XRMS
Open Source CRM

User Manual

Version

July 14, 2005

Version 3

- Added Plugin Information

Version 4

- Added ACL – many thanks to Aaron van Meerten for co-authoring this section.

Table of Contents

Overview

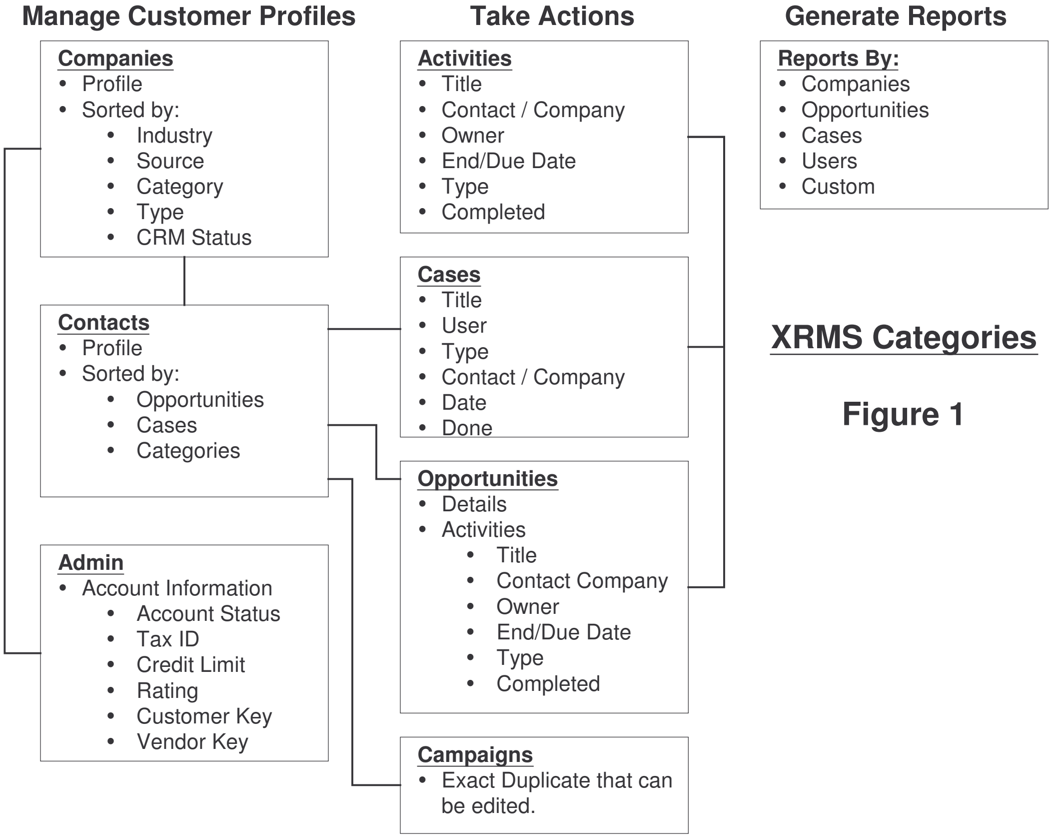
XRMS is a fully-integrated suite web-based Customer Relationship Management (CRM), Sales Force Automation (SFA), and business intelligence (BI) tools, allowing companies to integrate and manage their sales, service, and marketing data into a single information store.

It provides the ability to:

- Manage Companies and Contacts within a company.
- Initiate and manage Campaigns.
- Initiate and manage Cases, Opportunities and Activities related to Companies and Contacts.
- Upload files to Campaigns or Cases.
- Generate activity reports.
- Customize and administer the environment.

XRMS runs as a web application and requires PHP and MySQL. It runs in either a Windows or Linux environment.

Description of Components



XRMS Categories

Figure 1

XRMS is arranged in three major categories:

1. Management of Customer Profiles.
2. Take action on activities. Activity types include Activities, Cases, Opportunities and Campaigns.
3. Generate reports. Reports can be generated by Companies, Opportunities, Cases, Users and Custom.

Manage Customer Profiles (Companies and Contacts)

Customers consist of a Company, and Contacts within that Company.

Illustration 1

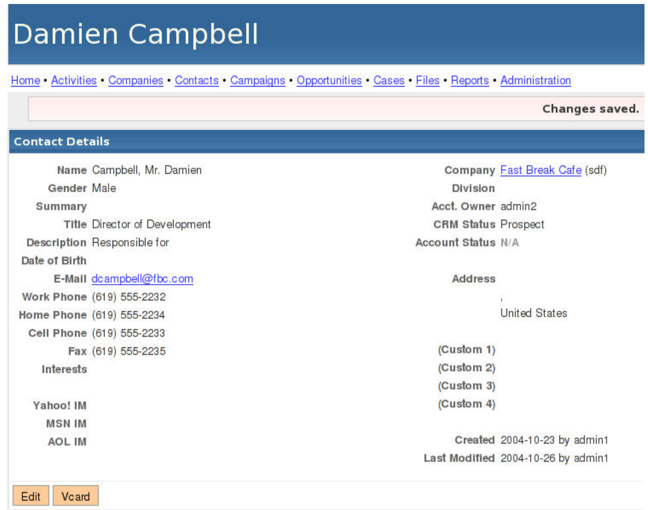


Illustration 2

XRMS displays your customers as Companies and Contacts. Company information (Illustration 1) includes the company name, address, telephone, fax, credit worthiness, relationship to other vendors and other information about your company client. Company has eight buttons (Illustration 3) to add, delete or modify information.

Illustration 3

Company Configuration Buttons

Edit – Modify the core of the Company information such as the Company name, CRM Status, telephone numbers, URL, etc.

Admin – Modify issues related to credit worthiness such as account status, federal tax ID, credit limit, rating, etc.

Clone – Exact copy of the current company. For use when one client has multiple entities providing different services from the same location, under different names.

Mail Merge – Send emails to the Contacts of this Company using the standard template, or your newly designed template.

News – Google News search for this Company.

<u>Relationships</u> – List associations of this Company to other Companies. Typical examples are that this company is a consultant, supplier for, or subsidiary for another Company. For each XRMS relationship there is an equal, opposite relationship. For example, if this Company shows a relationship of "retains consultant," the other Company will show a relationship of "Consultant for."

<u>Addresses</u> – Create and modify addresses for each Company location. Each Company can have an unlimited number of addresses. After Addresses are configured,

<u>Divisions</u> – List and create Divisions for each Company.

Contact information (Illustration 2) lists information about the people that work for the Company. All Contacts are associated with a Company. Contacts cannot exist outside of a Company. The detailed information for Contacts includes the name, address, telephone, fax, title, division and other relevant information.

Lead Management

XRMS provides for several types of actions related to a Contact or Company which include:

1. <u>Activities</u> – are actions of a user such as a telephone call or email to a Contact. All Activities are related to a Company or Contact. Activities may also be related to Cases, Opportunities and Campaigns. Activities include making telephone calls, sending emails or letters or having meetings. Activities can be related to a Contact, Company, Opportunity or Case.

2. <u>Cases</u> – are used for support issues for a client.

3. Cases must be associated with a Company and a Contact within a Company. If no Contact is selected the Company default Contact is assumed. Activities can be initiated related to Cases.

4. <u>Opportunities</u> - which are typically sales related Opportunities must be related to a Company and a Contact within a Company. If no Contact is selected the Company default Contact is assumed. . Activities can be initiated related to Opportunities.

5. <u>Campaigns</u> - which are typically marketing related like a mailing to Companies /Contacts where a fixed length of time and a fixed budget. Opportunities can be associated to a specific Campaign.

Starts and Ends dates for activities are in days. Either the popup calendar can be used to select Starts and Ends or a user can type in the number of days to Starts or Ends. XRMS will interpret the users input and calculate the correct date. Examples of free form dates that can be entered are:

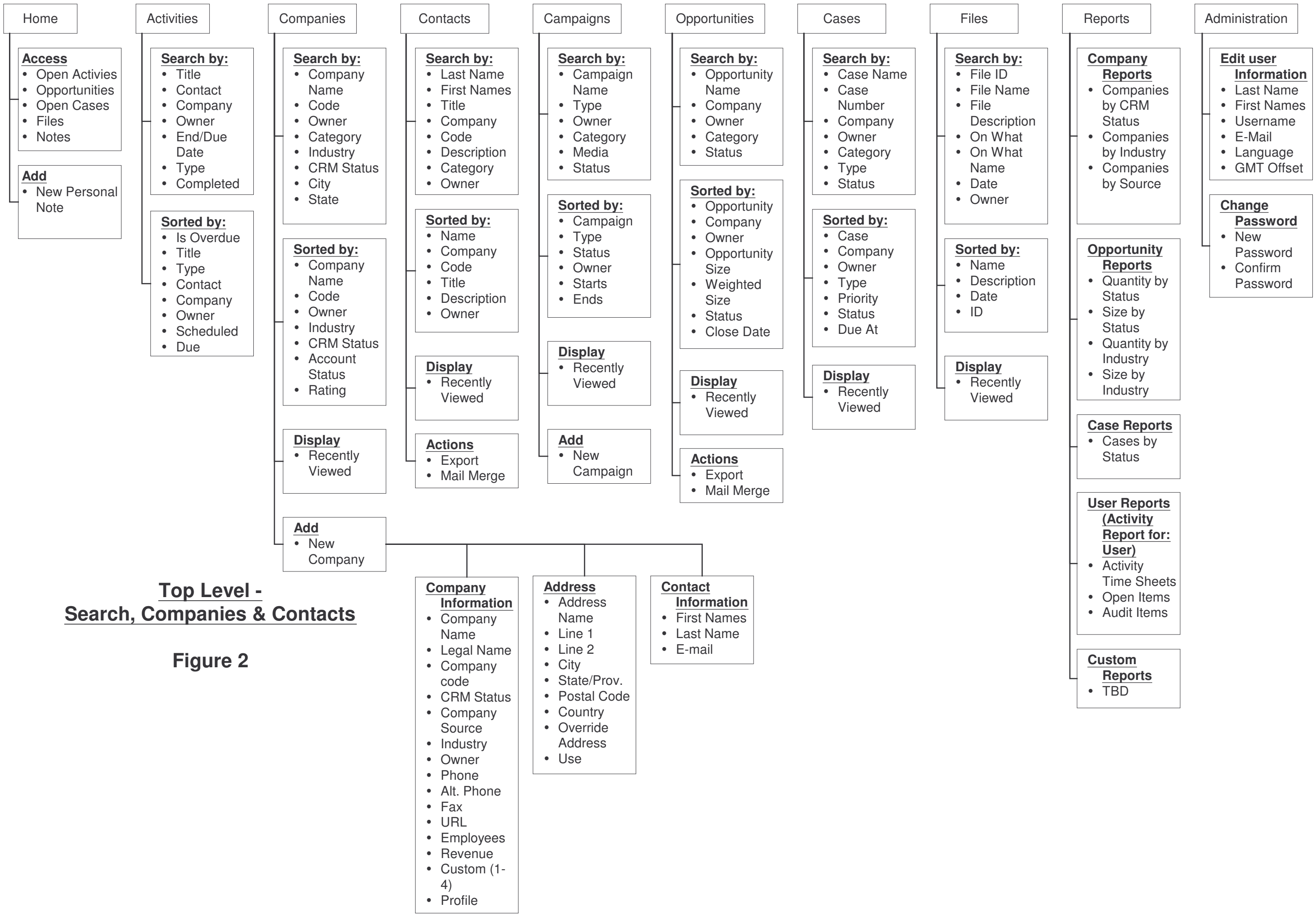
- 10 (means 10 days)
- 10 days
- 2 weeks
- 1 month
- 1 year
- next Tuesday (in newer versions of PHP)

Generate Reports

XRMS provides to generate reports by:

1. Companies
2. Opportunities
3. Cases
4. Users
5. Custom

Top Level Windows



Top Level - Search, Companies & Contacts

Figure 2

The top tabs to the windows mainly provide the ability to search for a Companies, Contacts, Opportunities, Cases, Files, Reports. All searches can contain multiple criteria's and are exclusively or'ed. The Administration tab provides the ability to customize the various components of XRMS if administrative rights have be granted to the user. If not, the user can only change their profile.

All additions to Companies Contacts and Cases must to done under the Companies tab. Campaigns can be added under the Campaign tab since they are not related to a specific Company.

Home

The Home window provides easy access to a users:

- Opportunities
- Open Cases
- Files
- Notes

The user can access any of the above by clicking on it.

Activities

The Activities window provides the ability to search for Activities by Title, Contact, Company, Owner, End/Due Date, Type or Completed.

Activities can be sorted by Is Overdue, Title, Type, Contact, Company, Owner, Scheduled or Due.

Activities can be independent of Companies / Contacts or associated with Companies / Contacts, Opportunities or Cases.

Companies

The Companies window provides the ability to:

- Search for a company based on variety of search options; Name, Code, Owner, Category, Industry, CRM Status, City, State. The search results are displayed in the same window.
- Add new company.
- Easy access to Recently Viewed companies.

The resulting search list can be sorted by Company Name, Code, Owner, Industry CRM Status, Rating.

Contacts

The Contacts window provides the ability to:

- Search by Last Name, First Names, Title, Company, Code, Description, Category, Owner.

The resulting search can be sorted by Name, Company, Code, Title, Description, Owner.

Recently viewed Contacts are also displayed in this windows.

New Contacts can only be entered under the Companies window by selecting or adding a company and then by adding the Contacts under that company. The system is driven by Companies not Contacts.

Campaigns

The Campaign window provides the ability to:

- Add new campaigns.
- Search for existing campaigns by Campaign Name. Type, Owner, Category, Media, Status.

Recently viewed campaigns are also displayed.

Opportunities

The Opportunities window provides the ability to:

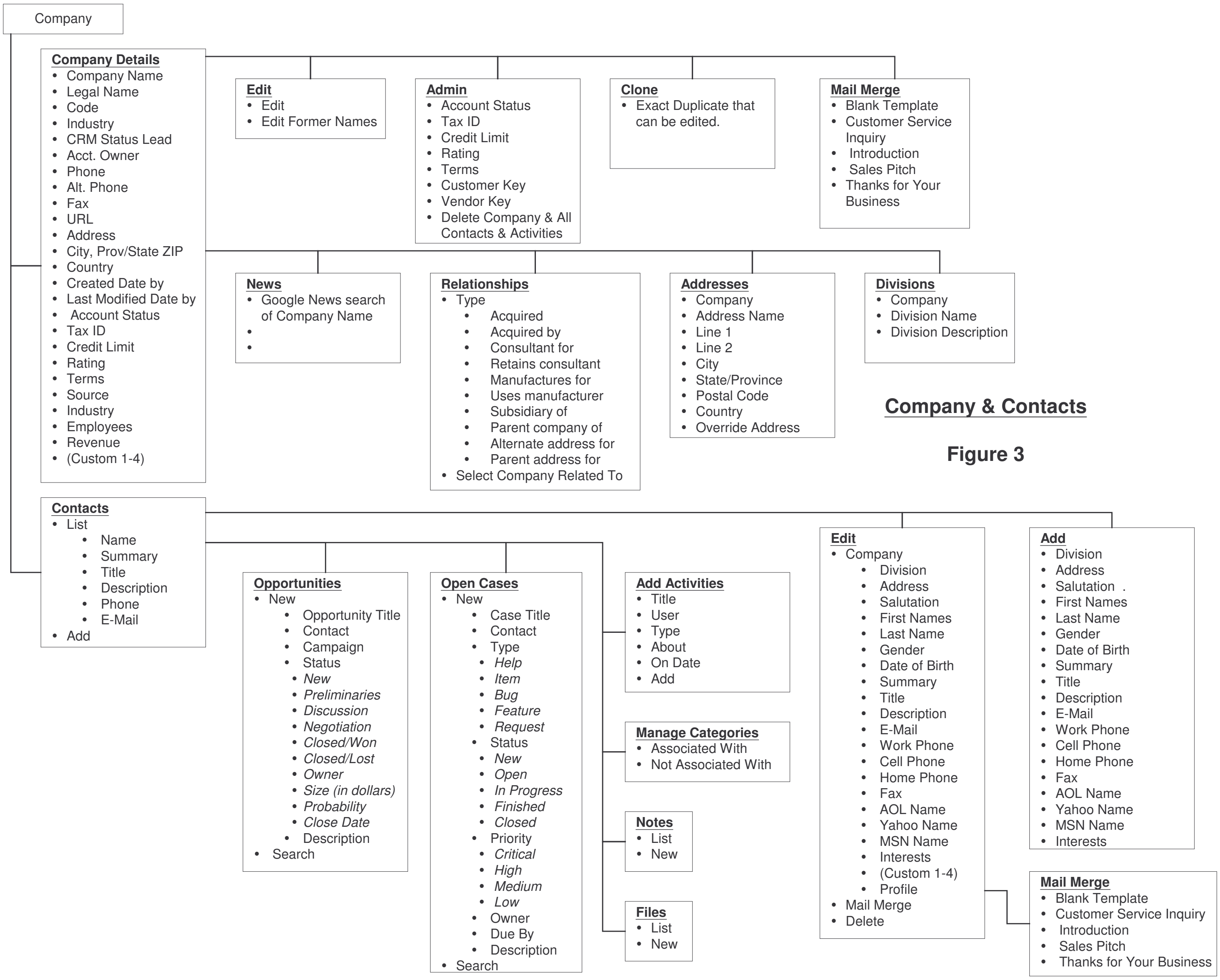
- Search by Opportunity Name, Company, Owner, Category, Status.
- Export the Opportunities into an spreadsheet.
- Create a mail merge from a template. The templates available are a Blank Template, Customer Service Inquiry, Introduction, Sales Pitch or Thanks for Your Business.

Resulting searches can be sorted by Opportunity, Company, Owner, Opportunity Size, Weighted Size, Status, Close Date.

Recently viewed Opportunities are also displayed.

Opportunities can only be added under the Company window.

Company and Contacts



Company & Contacts

Figure 3

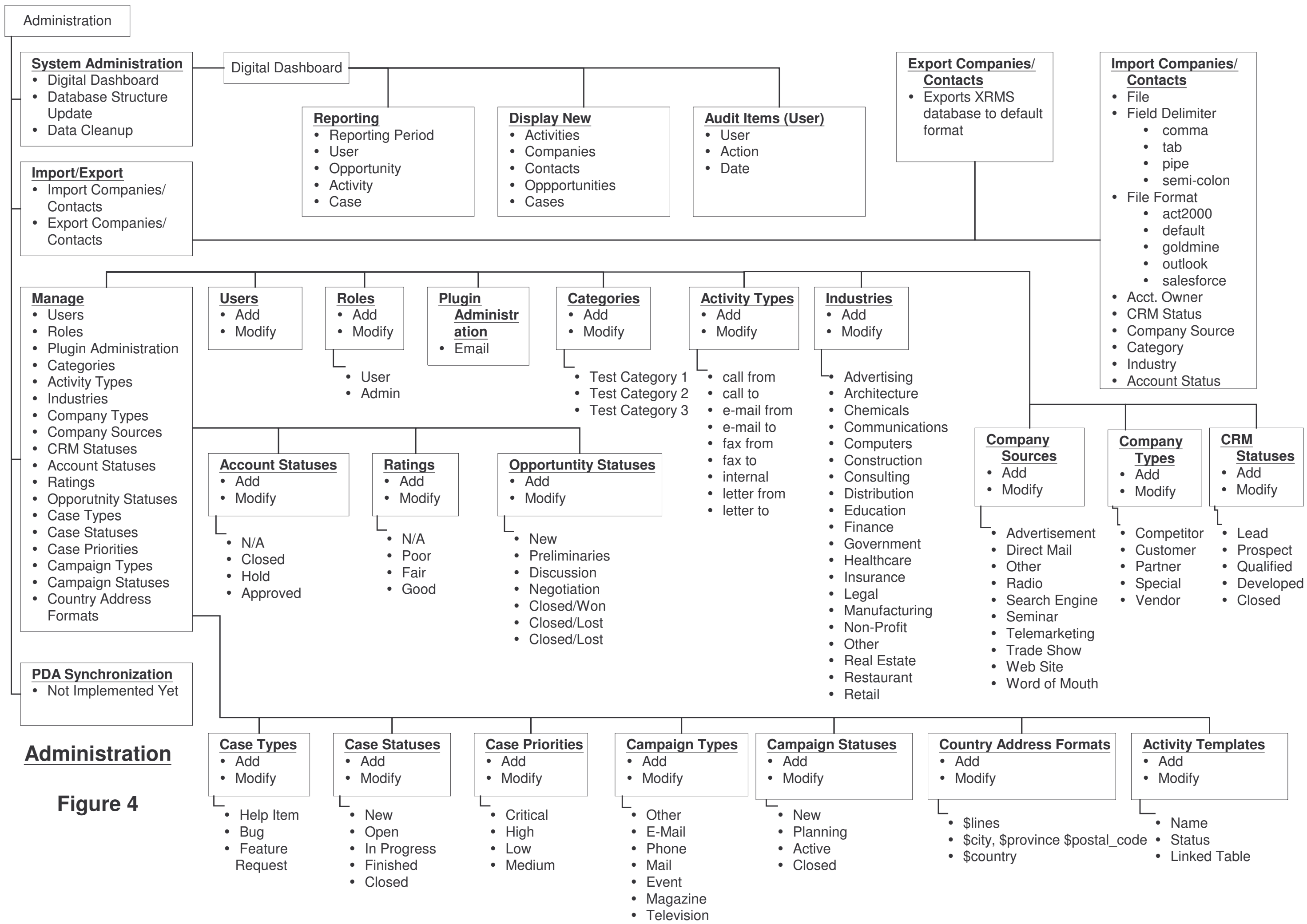
All data management of the Company, Contacts, Opportunities, Cases, Activities, Categories, Notes and Files can be accessed from the Company & Contacts section. This includes editing, deleting, adding or modifying information.

Remember, Contacts are always related to Companies. A Company must to be added to add any Contacts.

Opportunities, Cases, Activities can be added or edited under Contacts for a specific Company. Notes and Files can also be added and attached to Contacts and Companies.

An email can be sent to a Contact with the Mail Merge feature. Boilerplate emails are provided or a Blank Template can be used.

Administration



Administration

Figure 4

System Administration

System Administration consists of:

- Digital Dashboard:
  - Provides various reports by User, Opportunity, Activity and Case.
  - Displays new Activities, Companies, Contacts, Opportunities and Cases.
  - Displays Audit Reports of Users.
- Database Structure Update - which updates the database structure.
- Database Cleanup - which cleans up the database.

Data Management

XRMS provides the ability to import and export data into the XRMS database.

Import Companies/Contacts

Imports data from a delimited form, comma, tab, pipe or semi-colon. File structures supported are act2000, goldmine, salesforce, outlook or the default format of XRMS. The default format is defined in the Appendix 2 - Default Import Format.

Imported data is imported with the following criteria:

- Acct. Owner
- CRM Status
- Company Source
- Category
- Industry
- Account Status
- Rating

Unless specified, the import of data assigns the default country to be the USA if there is no country indicated in the country field associated with that Company. To change the default country, see Appendix 1 - Country Code List.

The default Gender is male.

The imported data is first displayed so the user can preview the data. You will notice that only one Company record is put into XRMS with the Contacts of each Company related to the Company record.

Once the data is previewed it can be submitted to the XRMS database.

Export Companies/Contacts

Export provides the ability to export all data in the XRMS database to a delimited file. It is exported in the default format.

User Setup

Users can be added to XRMS and granted access or turned off.

Roles can be added or modified. The default Roles are:

- Admin, which provides access to the Administration functions;
- User which does not have Administration functions.

Additional Roles can be added.

Setup

Before starting with XRMS, the various defaults should be reviewed and edited appropriately. The following can be modified, added to or deleted. Once deleted, the action cannot be reversed so be careful, all associations with Companies, Contacts, Cases and Campaigns will be lost.

- Categories,
- Activity Types,
- Industries,
- Company Types,
- CRM Statuses,
- Account Statuses,
- Ratings,
- Opportunity Statuses,
- Case Types,
- Case Statuses,
- Case Priorities,
- Campaign Types,
- Campaign Statuses,
- Country Address Formats,

The defaults provide a basic example of the function of each. There is no limit on the number of items that can added under each group.

Access Control List (ACL)

Overview

The ACL is a set-based permission system. It has individual entities made up of Users, Roles, Groups, Permissions, and Controlled Objects. The intersections of these sets make up the permission system.

Users are assigned a Role in a Group. Users may have more than one Role in any Group, and can be a member of more than one Group. Groups may contain other Groups as members, so if a User has a role in a Group, and that Group also contains a sub-Group, the User has the role in the sub-Group as well.

Groups can also contain Controlled Objects. These are called Group Members. Any Controlled Object that is a member of a Group will get any Group-scoped permissions that are applied to that Controlled Object.

Controlled Objects are the entities which permissions are applied to. These can be table-based entities (like Companies, Contacts, etc) or page/logic entities like Administration.

Controlled Objects are related to one another through Controlled Object Relationships. These describe the type of relationship between the objects. The simplest of these simply specifies which Object is the Parent and which Object is the Child. For instance, a Company is the Parent object to a Contact. Since Company is specified to have an identifying field of ‘company_id’, the ‘company_id’ in Contacts is used to determine which Company Controlled Object to use in determining the permissions.

A more complex Controlled Object Relationship is one called 'Singular'. This denotes the relationship that a Child Object has the 'on_what_table' and 'on_what_id' fields, that can connect it to any other Object, but only one. Marking Singular as one (1) in the interface will cause this relationship to be examined.

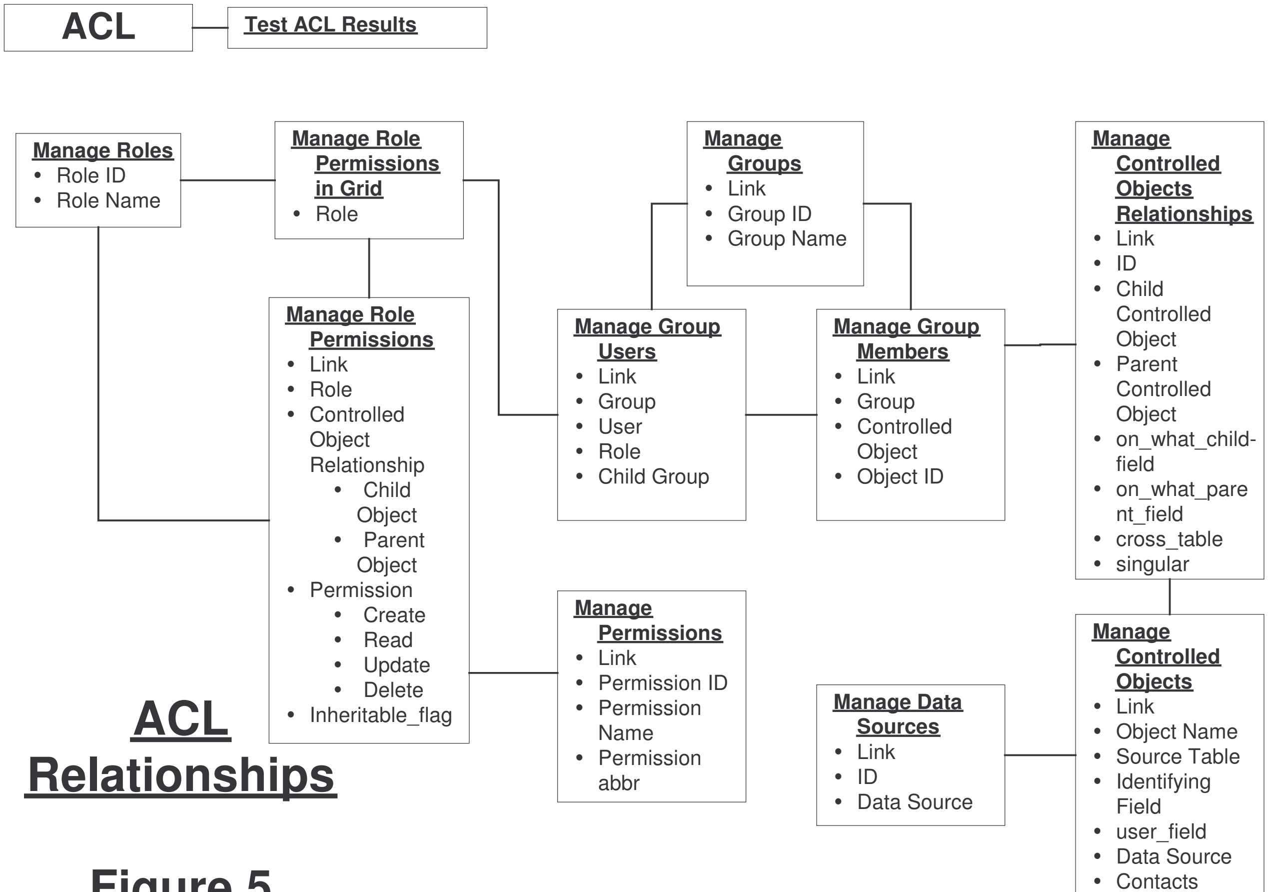
Another complex Controlled Object relationship is the cross_table. This allows a relationship with a third table between two other Controlled Objects, where lookups between them can occur. XRMS currently does not implement any cross_table relationships, but they are fully functional.

Permissions are granted to Roles on Controlled Object Relationships. This means that for any given Role, permissions (Create, Read, Update, Delete and Export) can be set on a Controlled Object Relationship, with a scope of World, Group, or User and also marked as inheritable.
An example would be granting World Read on top level Companies. Since Companies are in a Relationship as a Child Object with a NULL parent, this means it is a top level Object. Granting Read on it at the World level means that any Object which is in a relationship that can be traced back up to Company at the top level will also be assigned this permission, as long as the permission is set to be inheritable. All permissions are inheritable by default, and must have inheritance disabled in the Manage Role Permissions interface if inheritance is not desired.

Another example would be to set Group Read on Activities attached to Cases. This would give Read permissions to users with this Role, only on Activities attached to Cases which are in the Group for which they have been assigned this role.

A third example would be to set User Update on Companies. This means that Users with this Role will be given Update permission on those Controlled Objects where the ‘user_id’ field is set to their user ID.

ACL Relationships



ACL Relationships

Figure 5

The above Figure 5 defines the relationships between the components of ACL.

The main components of ACL are:

- Roles
- Groups
- Controlled Objects
- Permissions

The relationships are:

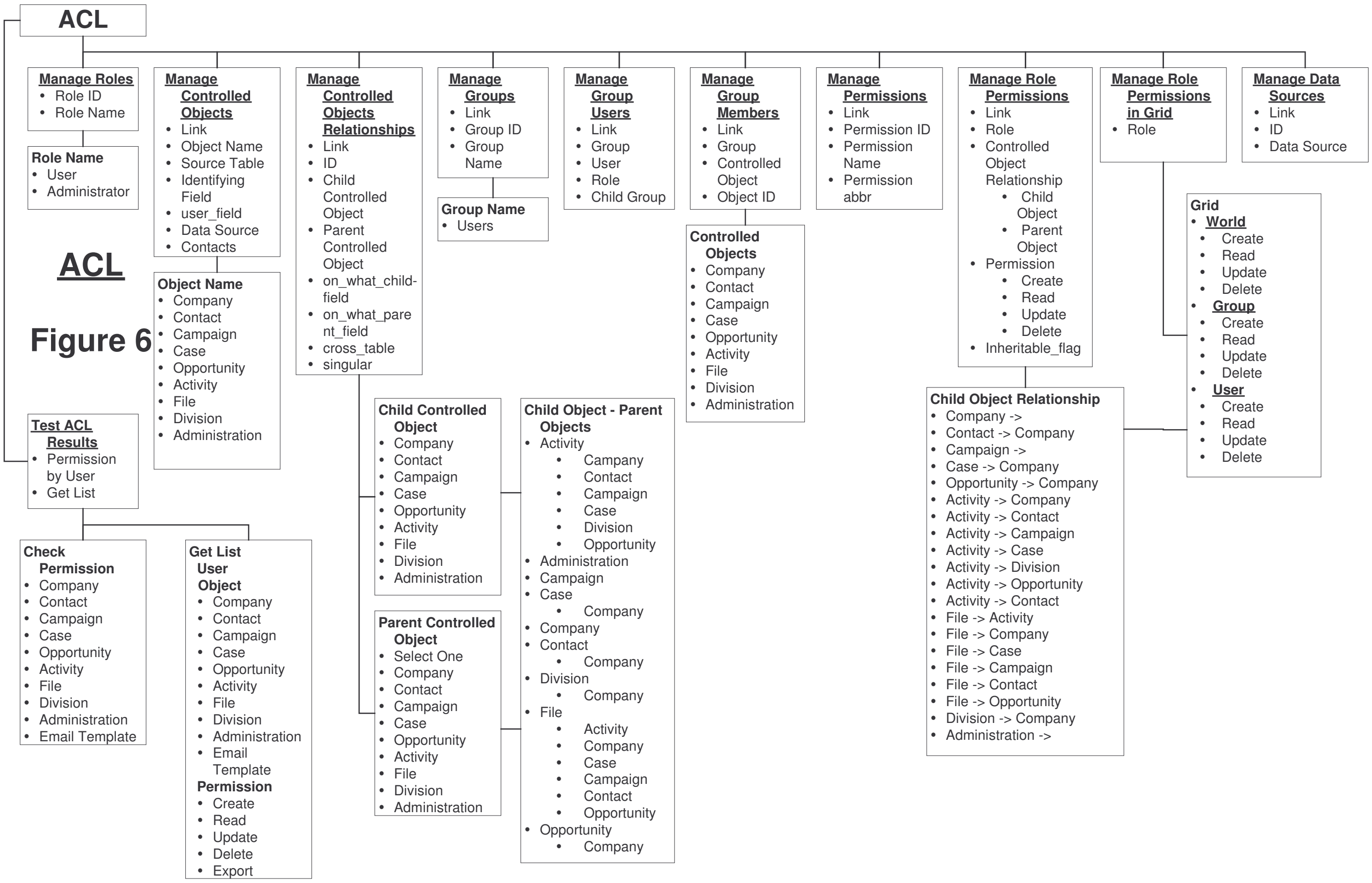
- Roles are related to Groups and Permissions.
- Groups are related to Controlled Objects.

XRMS's ACL provides the ability to assign Permissions by Users and Groups. Permissions can be Create, Update, Read, Export and Delete. It also provides the ability to restrict or add access to Controlled Objects. Controlled Objects that can be restricted are Company, Contact, Campaign, Case, Opportunity, Activity, File, Division and Administration.

To fully understand the power of ACL you must have an understanding of the XRMS database structure since the ACL manages the relationships between the database tables and table fields.

Although restricted access can be set for any Controlled Objects the menu items may still appear. If access has been restricted any action on that Controlled Object will generate a message indicating that the user cannot be authenticated for that action. For example, if a User has only read access to Companies and tries to add a New Company the message "You are not authorized to perform this function." will be displayed.

ACL Functions



The above, Figure 6, defines the functions available in ACL.

Manage Roles

The standard roles in XRMS are User and Administrator. Here you can add a Role type.

Manage Controlled Objects

Controlled Objects are objects that Access Controls can be assigned too. The default Controlled Objects in listed in the above Figure 6 as Object Name. This function allows you to add additional Controlled Objects and modify the database relationships against the Controlled Objects.

The above list identifies the current Controlled Objects in XRMS and there database relationships.

Manage Controlled Object Relationships

Each Controlled Object can have relationships with other Objects and a Child Relationship can be inherited from a Parent Relationship. For example, a Parent Object – Case is related to Activities and Files.

Manage Groups

The default Group in XRMS is Users. Here you can add additional Groups.

Manage Group Users

This allows you to assign Users and Roles to a Group.

Manage Group Groups

This allows you to assign a Child Group to a Parent Group.

Manage Group Members

This allows you to assign a Group to a Controlled Object.

Manage Role Permissions

This allows you to edit or add Permission types; the standard ones in XRMS are Create, Read, Update, Delete and Export.

Manage Role Permissions in Grid

This provides an easier way to assign Permissions to Roles, displayed in a grid. It lists all the Controlled Objects and their Parent/Child relationships, provides a method to assign Permissions to these Controlled Objects and to assign World, Group and User access. World means that it controls access for both Group and User. This is the best way to setup permissions once you have defined Roles, Controlled Objects, Controlled Object Relationships and Groups.

Manage Data Sources

This allows you to add database sources (databases) to XRMS. These data sources have the unique name which also corresponds to the key in the ACL authentication array, provided at run-time by any plugins which use the ACL, to allow the ACL to query into their data sources.

Test ACL Results

This test function allows you to:

- Check Permissions on an Object for a User.
- Get list of Objects for a user.

This allows you to identify what Permissions a User would have on what Objects. Permissions can be a combination of Create, Read, Update, Delete and Export.

You must have had some activity to test ACL since the test function looks at actual activity of a User.

Examples

Add a Role with Permissions View Companies and Contacts and Add Activities and Cases.

Okay let's add some new permissions to XRMS. Our example, will add a Role Viewer with the Role having the ability to Read only Companies, add Contracts and update Activities and Cases. The steps are:

1. Add a Role – Viewer: ACL → Manage Roles → Add New → Role Name: Viewer
2. Edit Permissions for Role – Viewer: Manage Role Permissions in a Grid → Role: Viewer → Manage Permission for Role → Select the following under World – Company → Read; then check the following:
    a. Company → Read;
    b. Contact->Company → Create, Update;
    c. Case->Company → Update;
    d. Opportunity->Company → Update;
    e. Then save by selecting Assign Permissions.
3. Create a New User with the Role = Viewer.

This is a very simple example but should give you a basic understanding of ACL and how it works.

Plugins

Here is a list of the plugins available in XRMS and what they provide. Plugins provide a convenient and easy way to link other applications into XRMS. Plugins are activated in the Administration Panel and some require installation of other programs or components.

Plugin Name	Activation	Stable	Description
apb as of July 14, 2005 - doesn't work	Requires installation of apb.	No[1]	Active PHP Bookmarks provides a function for users to bookmark websites and share these bookmarks.
autostatus	Requires installation of Autostatus.	??	Provides status of servers and network devices. This is good to provide a quick status report for users of the critical systems that would impact their operations.
censusfactsheet	Administration Panel only.	Yes	Queries US census website with address information of Contact information.
cti	Installation required.	??	Connection to the Asterisk Open Source PBX http://www.asterisk.org/ voicemail system.
demo	Administration Panel and addition of a webpage demo.php	Yes	Provides a link to a demo page within XRMS. The demo page would have to be provided.
dunfinder	Installation required.	Yes	Dial Up Number Finder for the US.
idphoto	Administration Panel only.	Yes	Displays id photo of contact. Upload photos 120x160 with File Upload and name id_photo_### where ### is the contact_id=###
info	Installation required.	No	Additional tables to track characteristics of computers.
mapquest	Administration Panel only.	Yes	Passes address to mapguest.com to provide an address lookup. Cannot have both whereis and mapquest activated at the same time.
mrtg	Installation required.	???	Multi Router Traffic Grapher
opportunitynotes	Administration Panel only.	Yes	Adds the ability to add notes to an Opportunity.
phone	Administration Panel	Yes	Search for phone numbers in Company or Contact.

[1] Potential security risk since uses register_globals=On

Plugin Name	Activation	Stable	Description
radtest	??	??	Uses freeradious.org to authenticate dialup users.
serverinfo			Obsolete Plugin replaced by info plugin.
sitewx	Requires installation and weather station hardware connection.	??	Weather station plugin to provide real-time and graphical weather information.
tavi			Wiki
useradmin	Administration Panel only.	No	User admin plugin - NOT RECOMMENDED SINCE CREATES A SECURITY RISK.
vcard	Administration Panel only.	Yes	Creates a vcard of the Contact
voicemail	Installation of voicemail system required.	??	Provides link to a voicemail web page.
webcalendar Discontinued by development team.	Requires installation of Webcalendar.	Yes	Link to Webcalendar - Webcalendar is a shared calendar application - very nice.
webform	Installation required.	Yes	Creates a webform on your external website.
Weblinks	Administration Panel only.	Yes	Provides links to google and googlenews from the Company page.
Whereis	Administration Panel only.	Yes	Same as mapquest but link to whereis.com.au - Australia Cannot have both whereis and mapquest activated at the same time.
Owl Integration	Installation of Owl required.	Yes	OWL is a document management system. This will add a link to the Owl application within XRMS.

Glossary

Term	Association	Description
Account Status	Companies	Status of a Company's account - N/A, Closed, Hold, Approved.
Activities	Activities	Any Activity with a Company - must include description, be assigned to a User, include a Type (call from, call to, e-mail from, e-mail to, fax from, fax to, internal, letter from, letter to), can be associated to a Contact within a Company, can be about a Case, has a start date. Can be completed (grey) or uncompleted (pink).
Activity Time Sheet	Reports	List of Activities by User - lists Start and End Date, Duration, User Name, Company and Contact that Activity was for, link to Activity Detail.
Activity Types	Activities	Call from, call to, e-mail from, e-mail to, fax from, fax to, internal, letter from, letter to.
Administration	Administration	Administration of XRMS includes the ability customize fields, generate reports and add, modify and delete Users.
Audit Items	Administration	Detailed Audit by user of all actions executed on the XRMS System.
Campaign	Campaigns	Several related operations aimed at achieving a particular goal. Usually for a specified period of time. Usually not related to a specific Company.
Campaign Status	Campaigns	New, Planning, Active or Closed.
Campaign Types	Campaigns	E-Mail, Event, Magazine, Mail, Other, Phone, Television
Case	Cases	An occurrence of something related to a specific Company. Case Types can be Help Item, Feature, Request. Case Types can be added and modified by the Administrator. Activities can be related to a specific Case.
Case Priorities	Cases	Level of urgency - Critical, High, Low, Medium. Case Priorities be added and modified by the Administrator.
Case Status	Cases	New, Open, In Progress, Finished, Closed. Case Status be added and modified by the Administrator.
Category	Companies Contacts	A custom field that can be related to Contacts, Companies, Campaigns and Cases. Categories can be added and modified by the Administrator.

Term	Association	Description
Company	Companies	Any Company that is in the XRMS database. Contacts can only be associated to Companies. Companies can be associated with Cases and Activities.
Company Code	Companies	A unique code that can be assigned to a Company by any User.
Company Source	Companies	Source where the Company found your business - Advertisement, Direct Mail, Other, Radio, Search Engine, Seminar, Telemarketing, Trade Show, Web Site, Word of Mouth. Company Sources can be added and modified by the Administrator.
Company Types	Companies	Type of company - Competitor, Customer, Partner, Special, Vendor. Company Types can be added and modified by the Administrator.
Country Address Formats	Administration	Format that the address is displayed, varies from
Country Code	Companies	Code identifying the default country. See Country Code List.
Created Date	Companies Contacts	Date that a Company or Contact profile was created.
Credit Limit	Companies	Credit limit in XRMS. Can be entered and modified by any User.
CRM Status	Cases	Status of a Case - Lead, Prospect, Qualified, Developed, Closed. CRM Status can be added and modified by the Administrator.
Customer Key	Companies	Unique number that is related to a Company. Can be modified or entered by any User
Digital Dashboard	Reports	Overview screen for Administrators that provides access Reports and displays new Activities, Companies, Contacts, Opportunities and Cases. Also provides audit reports by User.
Divisions	Companies	Divisions within a Company. A Division can have its own address, profile and contact information. It is always linked to a Company.
Employees	Companies	Number of Employees of a Company. Can be edited and entered by any User.
Export	Administration	Ability to export the XRMS database.
Files	Contacts Campaigns	Any file that is uploaded to XRMS, they can be word documents, spreadsheets, pdf files or any other file type.
Former Names	Companies	A Companies former name(s).
Import	Administration	Ability to import Company and Contact information into the XRMS database.

Term	Association	Description
Industry	Companies	Industry that a Company operates within (i.e. - Automotive, Healthcare, etc.). Industries can be added and modified by the Administrator.
Legal Name	Companies	Companies legal name. Typically the same as Company name but can be different. Can be edited and entered by any User.
Mail Merge	Companies Contacts	Ability to send emails to a Company or Contact. Boiler plate forms are provided or a Blank Template can be used. Mail Merge can be initiated from Company Details or from an
Modified Date	Companies Contacts	Date a Company or Contact record was modified.
News	Companies	Initiates Google news search of Company name.
Open Activities	Activities	Activities that are not closed or completed.
Open Cases	Cases	Cases that are not closed or completed.
Open Items	Cases	Activities or Cases that still require Activities to complete and Close.
Opportunity	Companies	An Opportunity with a Company or Contact.
Override Address	Companies	Alternate Company address that is used as the primary address, over-riding the primary address.
Owner	User	Owner of the Company and Contact information. Usually the User who entered or provided the information.
PDA Synchronization	Companies Contacts	Ability to synchronize Company and Contact information with XRMS. Currently not implemented.
Priority	Case	
Profile	Company Contact	A Companies or Contacts profile.
Rating	Company	A Companies Rating - Fair, Good, Poor, N/A. Typically credit rating.
Reports	Reports	Reports generated by XRMS.
Revenue	Company	Companies annualized revenue.
Roles	User	Type of Users. Standard are Admin User and User where the Admin User can modify the Administration features of XRMS.
Tax ID	Company	Tax ID. Can be added or edited by any User.

Term	Association	Description
Terms	Company	Payment Terms, net xx days. Edited from the Admin panel under Company.
User	User	A XRMS User that can add, modify, delete Companies, Contacts, Cases, Opportunities and Activities.
Vendor Key	Company	Unique field that can be added or modified by a User.

Appendixes

Appendix 1 - Country Code List

Country	Code		Country	Code
	1		Cape Verde	40
Afghanistan	2		Cayman Islands	41
Albania	3		Central African Republic	42
Algeria	4		Chad	43
American Samoa	5		Chile	44
Andorra	6		China	45
Angola	7		Christmas Island	46
Anguilla	8		Cocos (Keeling) Islands	47
Antarctica	9		Colombia	48
Antigua and Barbuda	10		Comoros	49
Argentina	11		Congo	50
Armenia	12		Cook Islands	51
Aruba	13		Costa Rica	52
Australia	14		Croatia	53
Austria	15		Cuba	54
Azerbaijan	16		Cyprus	55
Bahamas	17		Czech Republic	56
Bahrain	18		Democratic People's Republic of Korea	57
Bangladesh	19		Democratic Republic of the Congo	58
Barbados	20		Denmark	59
Belarus	21		Djibouti	60
Belgium	22		Dominica	61
Belize	23		Dominican Republic	62
Benin	24		Ecuador	63
Bermuda	25		Egypt	64
Bhutan	26		El Salvador	65
Bolivia	27		Equatorial Guinea	66
Bosnia and Herzegovina	28		Eritrea	67
Botswana	29		Estonia	68
Brazil	30		Ethiopia	69
British Virgin Islands	31		Faeroe Islands	70
Brunei Darussalam	32		Falkland Islands (Malvinas)	71
Bulgaria	33		Federated States of Micronesia	72
Burkina Faso	34		Fiji	73
Burundi	35		Finland	74
C?d?Ivoire	36		France	75
Cambodia	37		France, metropolitan	76
Cameroon	38		French Guiana	77
Canada	39		French Polynesia	78

Country	Code		Country	Code
Gabon	79		Liberia	119
Gambia	80		Libyan Arab Jamahiriya	120
Georgia	81		Liechtenstein	121
Germany	82		Lithuania	122
Ghana	83		Luxembourg	123
Gibraltar	84		Macau	124
Greece	85		Madagascar	125
Greenland	86		Malawi	126
Grenada	87		Malaysia	127
Guadeloupe	88		Maldives	128
Guam	89		Mali	129
Guatemala	90		Malta	130
Guinea	91		Marshall Islands	131
Guinea-Bissau	92		Martinique	132
Guyana	93		Mauritania	133
Haiti	94		Mauritius	134
Holy See	95		Mayotte	135
Honduras	96		Mexico	136
Hong Kong Special Administrative Region of China	97		Monaco	137
Hungary	98		Mongolia	138
Iceland	99		Montserrat	139
India	100		Morocco	140
Indonesia	101		Mozambique	141
Iran	102		Myanmar	142
Iraq	103		Namibia	143
Ireland	104		Nauru	144
Israel	105		Nepal	145
Italy	106		Netherlands	146
Jamaica	107		Netherlands Antilles	147
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Jordan	109		New Zealand	149
Kazakhstan	110		Nicaragua	150
Kenya	111		Niger	151
Kiribati	112		Nigeria	152
Kuwait	113		Niue	153
Kyrgyzstan	114		Norfolk Island	154
Lao People's Democratic Republic	115		Northern Mariana Islands	155
Latvia	116		Norway	156
Lebanon	117		Oman	157
Lesotho	118		Pakistan	158

Country	Code		Country	Code
Palau	159		Switzerland	199
Panama	160		Syrian Arab Republic	200
Papua New Guinea	161		Taiwan	201
Paraguay	162		Tajikistan	202
Peru	163		Thailand	203
Philippines	164		The former Yugoslav Republic of Macedonia	204
Poland	165		Togo	205
Portugal	166		Tonga	206
Puerto Rico	167		Trinidad and Tobago	207
Qatar	168		Tunisia	208
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Republic of Moldova	170		Turkmenistan	210
Romania	171		Turks and Caicos Islands	211
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Rwanda	173		Uganda	213
R□ion	174		Ukraine	214
Saint Helena	175		United Arab Emirates	215
Saint Kitts and Nevis	176		United Kingdom	216
Saint Lucia	177		United Republic of Tanzania	217
Saint Pierre and Miquelon	178		United States	218
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Sao Tome and Principe	194			
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Suriname	196			
Swaziland	197			
Sweden	198			

Appendix 2 - Default Import Format

Category	Default Import	Column #	Category	Default Import	Column #
//company info	company_name	1	//contact info	first_name	22
	legal_name	2		last_name	23
	division_name	3		email	24
	website	4		work_phone	25
	tax_id	5		home_phone	26
	extref1	6		fax	27
	extref2	7		division	28
	extref3	8		salutation	29
	company_custom1	9		date_of_birth	30
	company_custom2	10		summary	31
	company_custom3	11		title	32
	company_custom4	12		description	33
	employees	13		cell_phone	34
	revenue	14		aol	35
	credit_limit	15		yahoo	36
	terms	16		msn	37
	company_profile	17		interests	38
	company_code	18		contact_custom1	39
	phone	19		contact_custom2	40
	phone2	20		contact_custom3	41
	fax	21		contact_custom4	42
				contact_profile	43
				gender	44
			//address info	address_name	45
				line1	46
				line2	47
				city	48
				state	49
				postal_code	50
				country	51
				address_body	52
				use_pretty_address	53

If you wish to use the default template, name the columns in your .csv file as the columns are named above. Don't worry if your file doesn't have all the columns, or if the columns are in a different order.
The import routine uses the column names to determine which fields to map things to, but it doesn't assume 'perfect data'. Company names are required. If you want to import an address, City is required. All other data will be handled safely if it is missing (we think).
You may also create your own templates, and submit them for inclusion with XRMS.

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```
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