

XRMS User Manual

DRAFT 2

June 04, 2004

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Table of Contents

Overview	6
Description of Components	7
Manage Customer Profiles.....	7
Take Actions	8
Generate Reports.....	8
Top Level Windows.....	9
Home	9
Activities	10
Companies.....	10
Contacts.....	10
Campaigns.....	10
Opportunities.....	11
Company and Contacts	12
Administration	13
System Administration.....	13
Data Management	14
Import Companies/Contacts.....	14
Export Companies/Contacts.....	14
User Setup.....	14
Setup	15
Glossary	16
Appendixes	19
Appendix 1 - Country Code List.....	19
Appendix 2 - Default Import Format.....	22

Overview

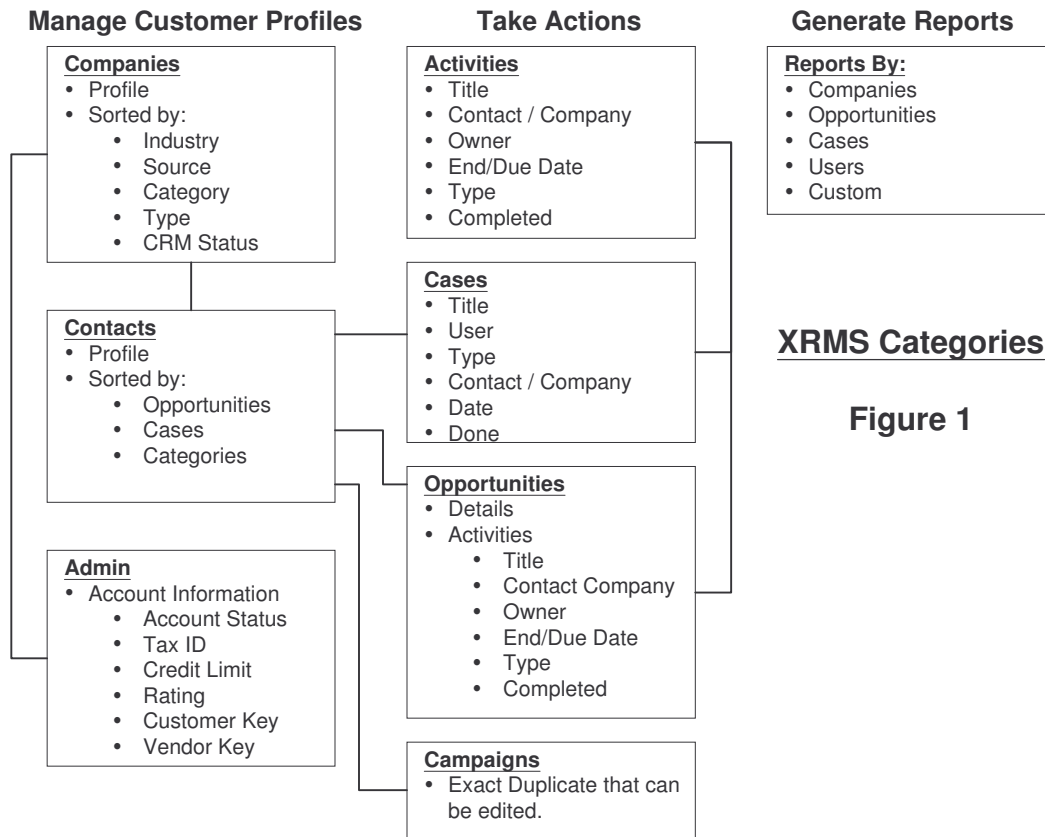
XRMS is a fully-integrated suite web-based Customer Relationship Management (CRM), Sales Force Automation (SFA), and business intelligence (BI) tools, allowing companies to integrate and manage their sales, service, and marketing data into a single information store.

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 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

The Companies profile is the main contact management section of XRMS for all Company, Contact and Admin (Account) information. Companies can be added and edited.

Contacts can only be added to a Company profile. Contacts must be related to a Company.

The Admin component provides the ability enter a Companies account information which includes Account Status, Tax ID, Credit Limit, Rating, Customer Key, Vendor Key.

Take Actions

The types of actions (activities) that XRMS provides are:

1. Activities - which can be any Activity that a User can initiate. Activities do not have to be related to a Company or Contact.
2. Cases - which are typically Company/Contact initiated, like service calls. 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.
3. Opportunities - 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.
4. Campaigns - 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:

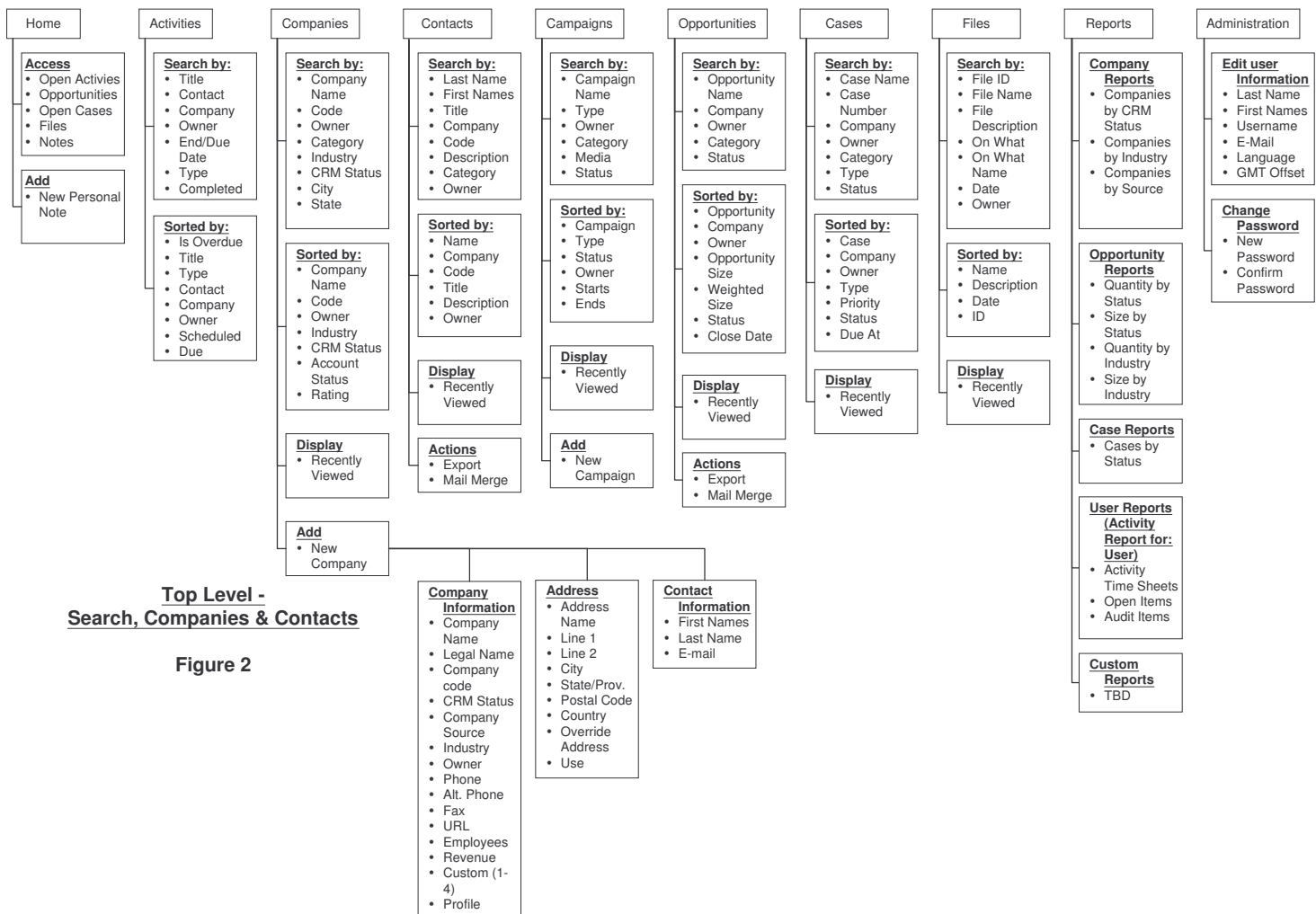
- 10 (means 10 days)
- 10 days
- 2 weeks
- 1 month
- 1 year
- next Tuesday (in newer versions of PHP)

Generate Reports

XRMS provides to generate reports by:

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

Top Level Windows



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:

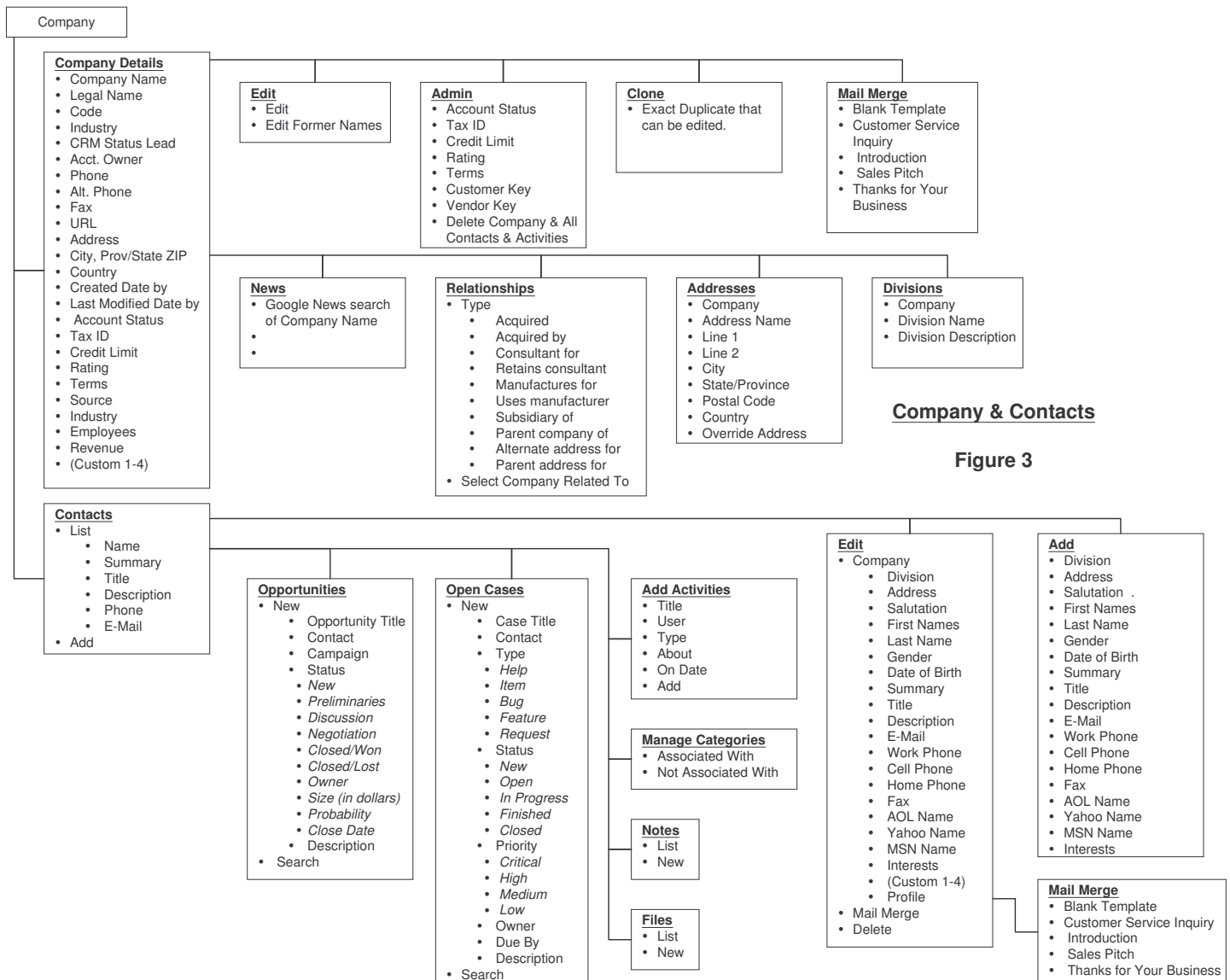
- Search by Opportunity Name, Company, Owner, Category, Status.
- Export the Opportunities into an spreadsheet.
- Create a mail merge from a template. The templates available are a Blank Template, Customer Service Inquiry, Introduction, Sales Pitch or Thanks for Your Business.

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 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

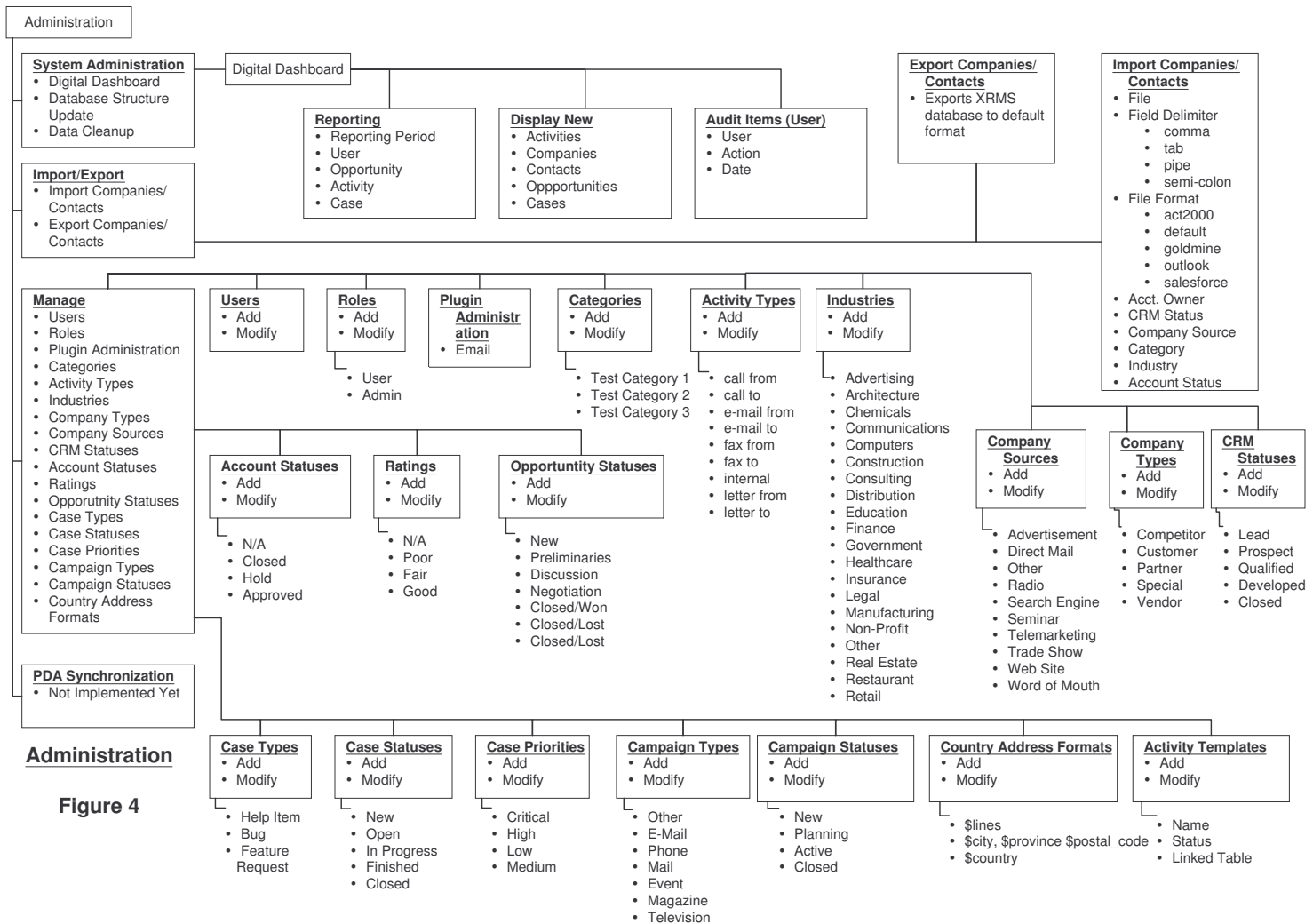


Figure 4

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.

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.
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	Administration	Format that the address is displayed, varies from

Term	Association	Description
Address Formats		
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.
Custom	Reports	
Custom Reports	Reports	
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.
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		
Opportunity		An Opportunity with a Company or Contact. Opportunity t
Override Address	Companies	Alternate Company address that is used as the primary address, overriding the primary address.
Owner	User	Owner of the Company and Contact information. Usually the User who entered or provided the information.
PDA	Companies	Ability to synchronize Company and Contact information with XRMS.

Term	Association	Description
Synchronizat ion	Contacts	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.
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
Japan	108		New Caledonia	148
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
Republic of Korea	169	Turkey	209
Republic of Moldova	170	Turkmenistan	210
Romania	171	Turks and Caicos Islands	211
Russian Federation	172	Tuvalu	212
Rwanda	173	Uganda	213
R ^o 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
Saint Vincent and the Grenadines	179	United States Virgin Islands	219
Samoa	180	Uruguay	220
San Marino	181	Uzbekistan	221
Saudi Arabia	182	Vanuatu	222
Senegal	183	Venezuela	223
Seychelles	184	Viet Nam	224
Sierra Leone	185	Yemen	225
Singapore	186	Yugoslavia	226
Slovakia	187	Zambia	227
Slovenia	188	Zimbabwe	228
Solomon Islands	189		
Somalia	190		
South Africa	191		
Spain	192		
Sri Lanka	193		
S ^o Tom ^o nd Principe	194		
Sudan	195		
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.