C E N T U R I A

SMB iCRM database

SMALL BUSINESS

CUSTOMER RELATIONSHIP MANAGEMENT

User Guide & CRM Navigation

IBM Business Partner

More information: info@centuria.co.uk

Download Demo Version of SMB iCRM database: http://www.centuria.co.uk

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Overview

The SMB iCRM system provides a complex management suite of advanced tools to aid in managing and developing business contacts and clients. The crm is a powerful system suitable for different small business companies (SMB).

It allows creating and managing of several types of documents/records such as: Companies, Contacts, and Communication etc. The application provides the ability to create and maintain company Mailing Lists, Tasks, Documents, Contracts, Invoices, Projects, and more.

Almost all parameters in the application are customisable. You can even customize your SMB iCRM workspace/homepage. For example, if you need the Document Management option but you do not need the Mail or Calendar options you can disable or enable these features and fully customize your workspace in Setup panel.

All activities may be integrated with MS Office applications. You can create and maintain MS Word, Excel, Paintbrush, and PowerPoint documents. You can transfer your data to/and from MS Excel spreadsheets and work directly with your MS Outlook mail and calendar from within SMB iCRM database.

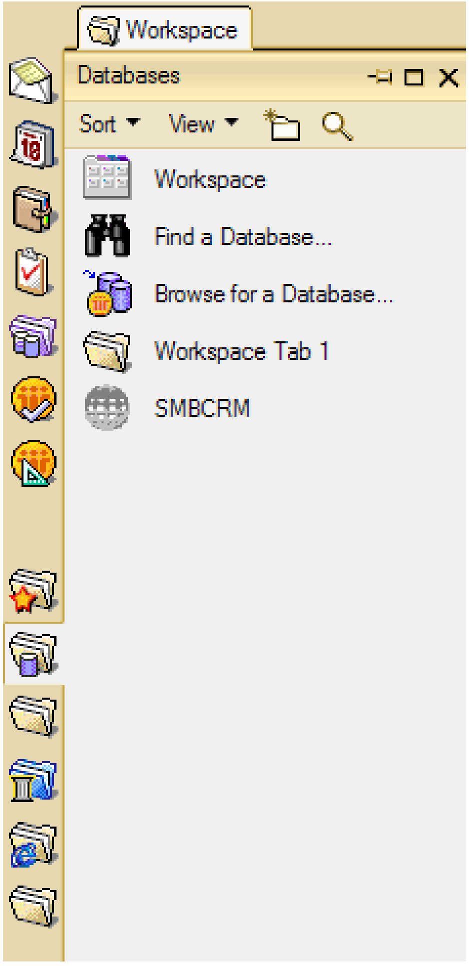
If you have any queries whilst using SMB iCRM database, please do not hesitate to contact us: info@centuria.co.uk.

We are always looking to develop the functionality of the database, so if you have any further requirements or feedback we would like to hear from you.

Navigation

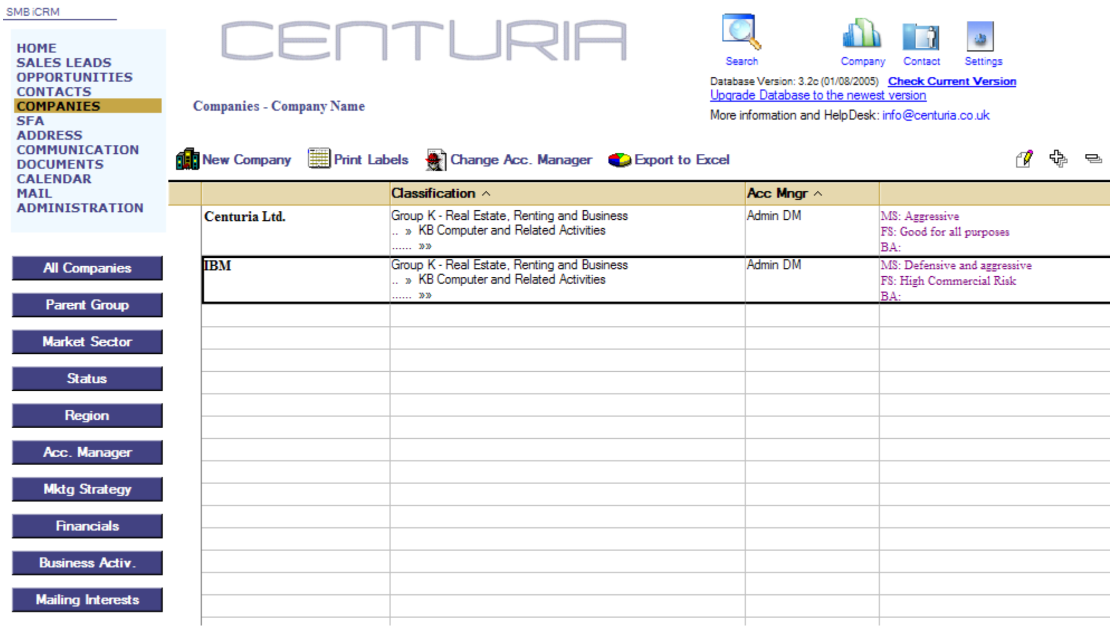
Getting Started

To access SMB iCRM, open Lotus Notes Client and find and click SMBCRM icon on your bookmarks page.



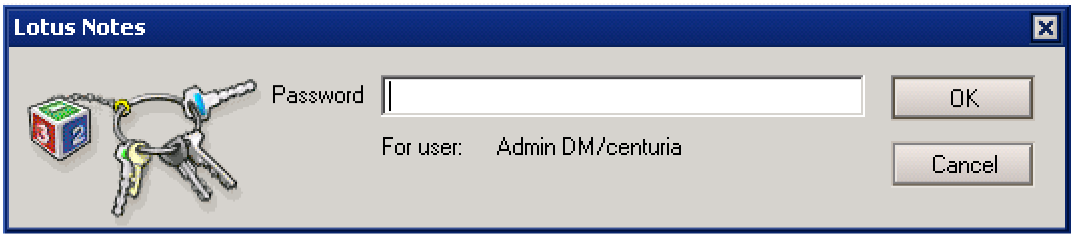
SMB iCRM Homepage

The SMB iCRM allows users to access their individually customized homepage.



Password protection

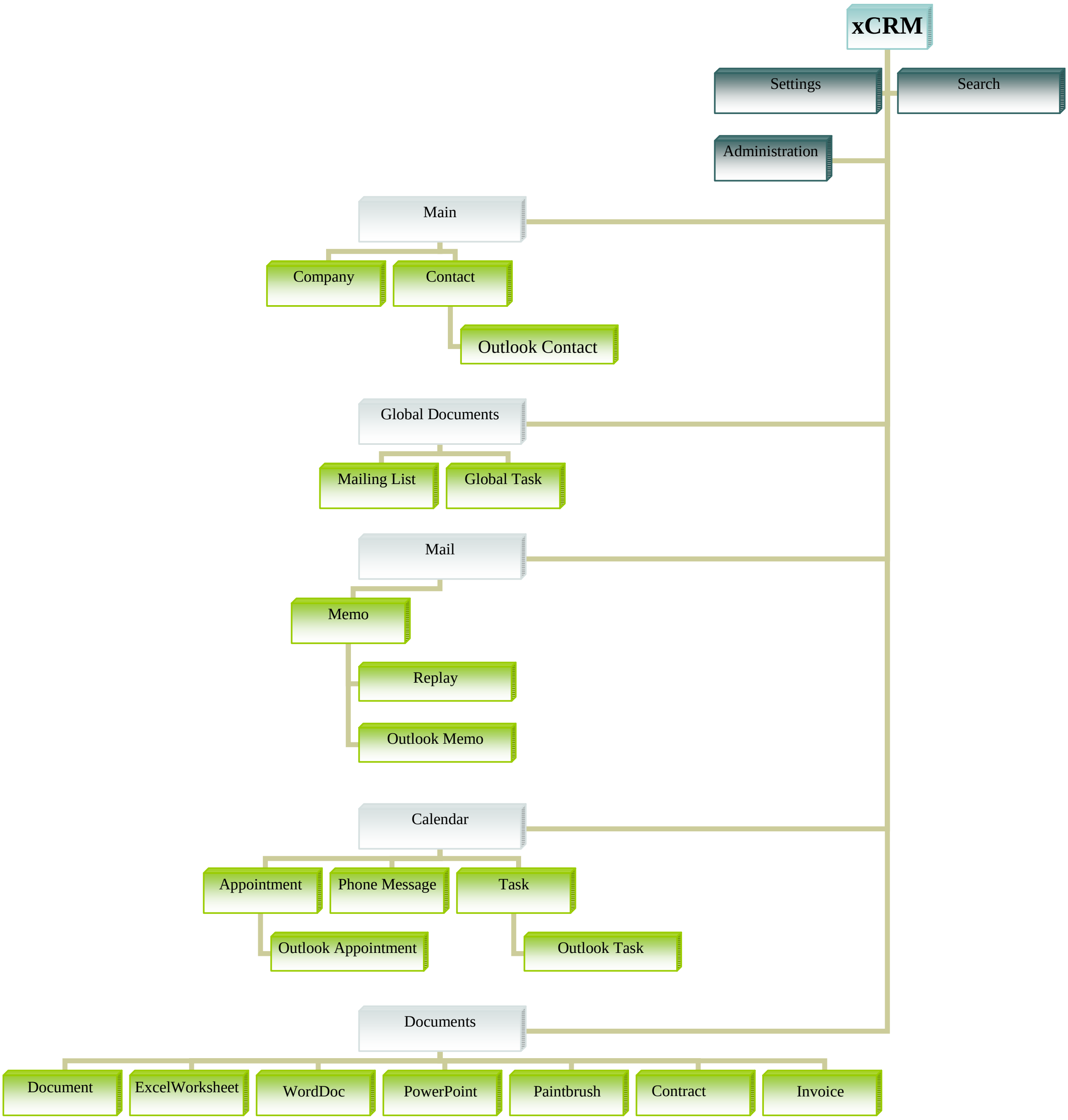
If your Lotus Notes ID file is supplied with a password, a box appears requesting you to enter it while trying to enter database.



Your username and password will determine whether you are allowed access to that database and upon entry into the database, what information you can see and edit.

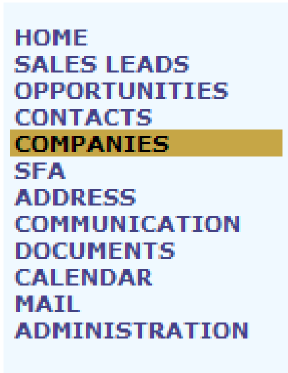
System Structure

The structure of SMB iCRM database has been designed to ensure that navigating around the system is simple for users whilst also ensuring system integrity and consistency.



Viewing information

SMB iCRM database has a Navigator Bar on the left hand side of the screen, which allows users to sort the information contained within the database in a variety of different views



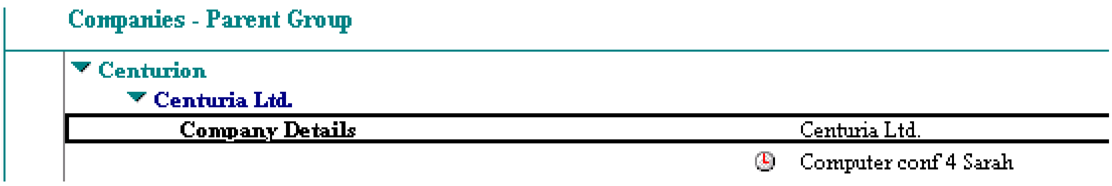
All views are grouped into a set list of categories. Selecting a category name will change the available view options.

Selecting an appropriate option on the Navigator Bar will rearrange/change the records in the main view.

Entering forms

Having entered the database and selected an appropriate view to work with, the forms within SMB iCRM database and information they contain can be accessed.

Entering a form will allow a user to view or edit the selected form



The triangle icons, also referred to as toggles, (shown below) will allow you to

expand and collapse records within a view. To do this, simply single click on the 'toggle'

A toggle facing downwards illustrates that the record has been fully expanded.

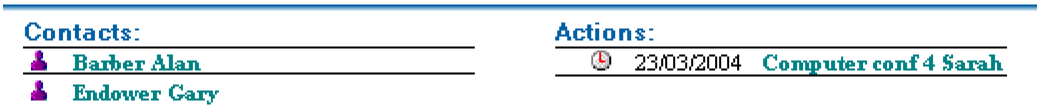
To enter a form, simply highlight and double-click on the relevant form.
(move mouse pointer over highlighted company)

Having entered and displayed the appropriate form in SMB iCRM database, the following form sections appear:

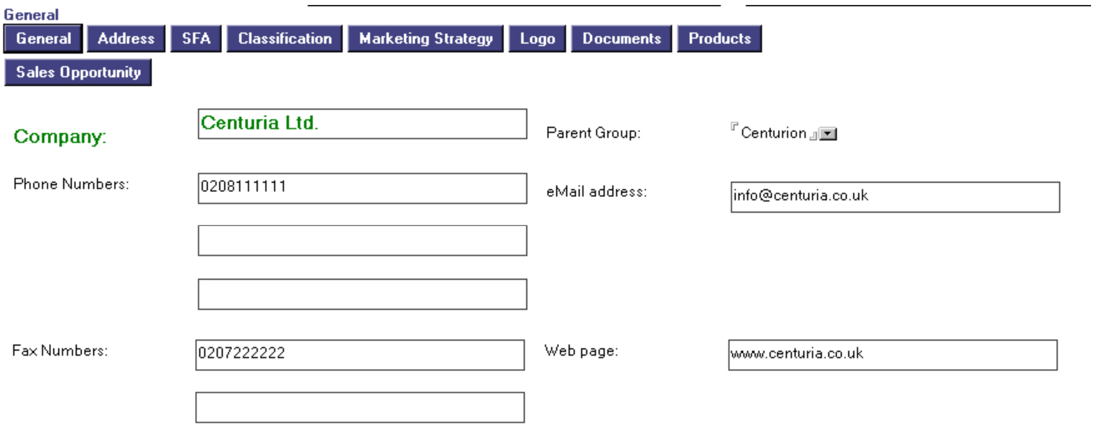
Icons: Allows doing specific actions on the document and/or on the database.

Business Card: Shows short descriptions in Company or Contact form.

Related Documents (Company and Contact form only): This section displays summaries for all the related documents to the form – each document can be accessed accordingly.

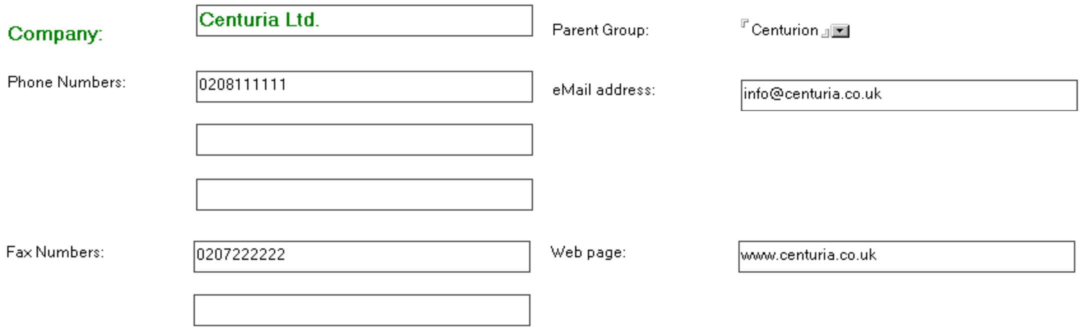


Editable Details: This section displays some groups of fields which allows user to enter details to the form (in Edit mode only).



Editing forms

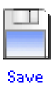
Once a user has entered a form, it would be in edit mode.



To close a form, click on the Close icon.

Using icons

The following form icons are used for creating, viewing and maintaining records within the database.

Icon	**Short Description**	Full Description
	**Compose Company**	The icon is used for adding new company form
	**Compose Contact**	The icon is used for adding new contact form
	**Assign**	The icon is used for assigning a document to existing Company or Contact
	**Close Document**	The 'Close Document' icon is used to close the current window
	**Delete Document**	The 'Delete Document' icon is used for deleting the current record and is only available once the record is in edit mode
	**Save Document**	The 'Save Document' icon is used for saving any changes that are made to the document and is only available once the document is in edit mode

	**Email**	The ‘Email’ icon is used for either creating a new Memo document or for opening user’s Mailbox folder
	**Appointment**	The ‘Appointment’ icon is used for creating a new Appointment, Phone Message or ToDo document
	**Document**	The ‘Document’ icon is used for creating a new Document, Excel Worksheet Document, Paintbrush Document, PowerPoint Document or WordDoc Document
	**Settings**	The ‘Settings’ icon is used for changing the database configuration
	**Open Web Site**	The ‘Open Web Site’ icon is used for opening the main Web address entered into the document
	**Compose Contract**	The ‘Compose Contract’ icon is used for creating the new Contract document
	**Compose Invoice**	The ‘Compose Invoice’ icon is used for creating the new Invoice document
	**Outlook Contacts**	The ‘Outlook Contacts’ icon is available only in Contact form and is used for: Creating New Outlook Contact, Creating Outlook Contact from current Contact document (with copied details), Creating a hidden Outlook Contact from current Contact document, Creating Outlook Contact from current Contact document with link, Opening Outlook Contacts.
	**Outlook Mail**	The ‘Outlook Mail’ icon is available only in Memo form and is used for: Creating New Outlook Mail, Creating Outlook Mail from current Memo document with copied details, Creating Outlook Mail from current Memo document with link, Opening the Outlook Inbox.

	**Outlook Calendar**	The ‘Outlook Calendar’ icon is available only in Appointment and Phone Message forms and is used for: Creating a New Outlook Calendar Entry, Creating an Outlook Calendar Entry from current Appointment or Phone Message document with copied details, Creating a hidden Outlook Calendar Entry from current Appointment or Phone Message document, Creating an Outlook Calendar Entry from current Appointment or Phone Message document with link, Opening the Outlook Calendar.
	**Outlook Tasks**	The ‘Outlook Tasks’ icon is available only in the ToDo form and is used for: Creating a New Outlook Task Entry, Creating an Outlook Task Entry from current ToDo document with copied details, Creating a hidden Outlook Task Entry from current ToDo document, Creating an Outlook Task Entry from current ToDo document with link, Opening Outlook Tasks.
	**Help**	The ‘Help’ icon will launch the help text
	**Search**	The ‘Search’ icon allows you to search for records using criteria from Company or Contact form fields, e.g. company name or company status.

In some forms and views you can find additional action buttons at the top of the form. For example, there might be a New Memo button in Mail view or a Reply To button in saved Memo form.

SMB iCRM forms

SMB iCRM database contains the following forms:

- Company
  Company document should contain all available information about the company and a description of all that is relevant to marketing and sales processes.
  The document is divided into the following sections:
  - General (company basic contact details)
  - Address (company address details, including additional addresses)
  - SFA (Sales Force Automation)
  - Classification (company status: Client, Prospect, …; Standard Industrial Classification; internal and marketing classification; competitors)
  - Marketing Strategy (marketing and financial information; campaign management)
  - Logo
  - Documents (all other documents related to the company)
  - Products (all products sold to the company)
- Contact
  Contact document should contain all available information about the person.
  The document is divided into the following sections:
  - General (contact basic details)
  - Marketing Strategy (marketing information and personal interests)
  - Personal Details (address details, additional personal information)
  - Business Address
  - Documents (all other documents related to the contact person)
- Contract
- Document
- Group (Mailing List)
- Global Task
- Invoice
- Memo
- ExcelWorksheet Document
- Paintbrush Document

- PowerPoint Document
- WordDoc Document
- Market Sector Category
- Market Classification
- Parent Group
- Profile Form
- Reply
- Response
- Response to Response
- Task
- Search
- Calendar Entry
- Phone Message

Database Search

There is a search engine built inside the database, which is designated to allow making a simple search for Company and Contact documents.

To start search engine click Search icon.

Now, you can select either Company or Contact form for searching.

Fill in only those fields you would like to search for and click Search button. Empty fields will be ignored.

Database Configuration

! To make any changes in the Database Configuration you must access database with appropriately configured ACL - database should be on a server or if it's a local copy you will have to find and click: *Enforce a consistent Access Control List across all replicas* in *Advanced* tag of the ACL window. Also the current user should be assigned to *Admin* role in the ACL.

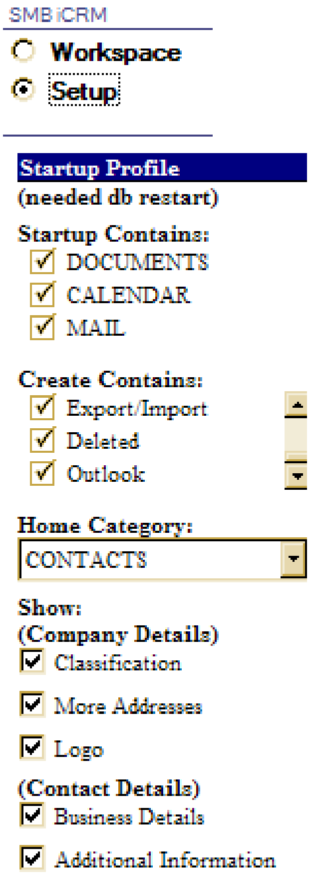
There are three areas of the database dedicated for configuration purpose:

- Database Setup
- Database Settings
- Administration Panel

Database Setup

Click *SMB iCRM* section.

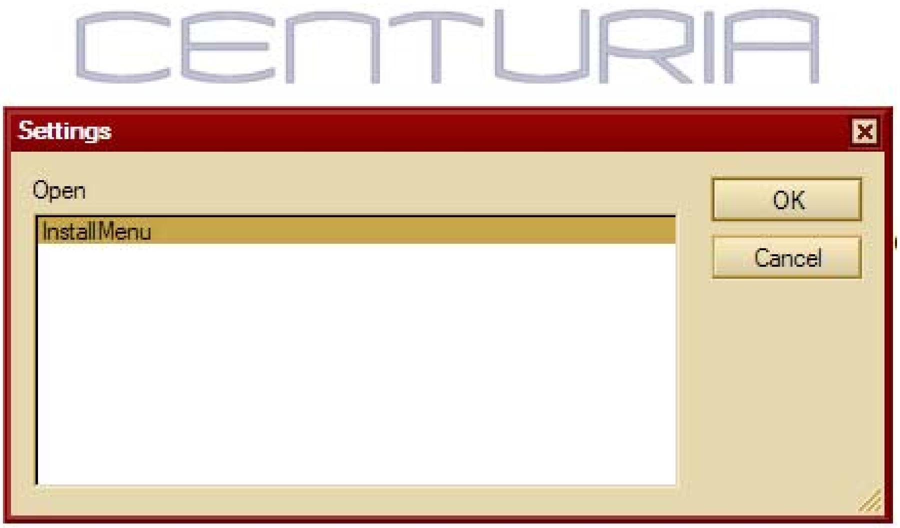
Select *Setup*.



You will be able to configure what particular segments of the database you would like to have access to. You can also see some database properties.

Database Settings

To access database settings click Settings icon:



Click OK.

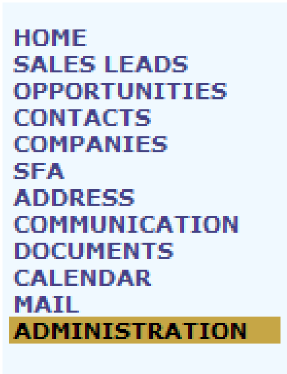
The Settings window will open.

Now you can do the following:

- Configure SMB iCRM database (do it once only - when you open the database for the first time)
- Open *Database Profile* (here you can set up all database specific parameters)
- Create *Market Sector Category* and *Market Classification* documents
- Create *Parent Group* (you can create a new Parent Group document for a group of companies)
- *Schedule Newsletter* Agent – Daily, Weekly, or Monthly (you can enable scheduled newsletter agent to have email notifications every time when Account Manager tasks reach or exceed theirs due date)

Administration Panel

To access Administration Panel select Administration from view category list.



The following views are available in the Administration Panel:

- Parameters
- Labels Configuration
- Export / Import Companies
- Export / Import People
- Authors
- Our Profile
- Mailing Lists
- Mailing Lists By Members
- Deleted Documents
- Conflicts

Parameters

The Parameters view allows you to:

1. Add and change the following profile settings (click Profile Form action button; note that not all options are currently used in the database):
    a. Company Status
    b. Market Sector
    c. Internal Sector
    d. Site Type
    e. Location Type
    f. Region
    g. Company Marketing Profile
    h. Financial Situation
    i. Business Activities
    j. Agreement Type
    k. Marketing Strategy
    l. Visit Frequency

m. Contract Type
n. Rejection Reason
o. Gain Reason
p. Loss Reason
q. ISO Certification
r. Brands
s. Current Supplier
t. Job rank
u. Job role
v. Other Influence
w. Mail List Interests
x. Responsible for
y. Certificates / Licences
z. Courses
aa. Education
bb. Surveys
cc. Title
dd. Location
ee. Department
ff. Marketing Activities
gg. Sales Lead Source
hh. Opportunity Type
ii. Business Type
jj. Product Category
kk. Product Subcategory
ll. Product Family
mm. Warranty
nn. Price Class
oo. Provider
pp. Units
qq. Countries

2. Create a new and modify existing *Market Sector Category* and *Market Classification* documents. You can create those documents when you want to add a list of *Market Sector Category* and *Market Classification* options for previously added *Market Sector* in the *Profile Form* document.
3. Create a new and modify an existing *Parent Group* document. Parent Groups are names of groups of companies. For instance IBM ® might be a parent group name for IBM ® UK, Lotus ® Software, and Tivoli ® Software.
4. Create a new and modify an existing *Product* document. *Product* documents describe our products, which we are going to sell (or already sold) for our customers. This information we can use in the Company document in the Products section.

Labels Configuration

In the *Labels Configuration* view you have some predefined configuration documents. You can edit and create new documents and use them later for creating mail labels for selected companies or contacts.

Export / Import Companies

This view is designated to export and import companies to and from Excel Workbook.

Export / Import People

This view is designated to export and import contacts to and from Excel Workbook.

Authors

For statistical reasons we also have available *Authors* view. It allows us to track who created how many documents, when they were created, and what documents were created by every user.

Our Profile

In the *Our Profile* view you should create a Company document containing all your own company details.

Mailing Lists

In the *Mailing Lists* view you can create and edit Mailing List documents (explained later).

Mailing Lists by Members

In the *Mailing Lists by Members* view we have all Mailing Lists categorized by member names.

Deleted Documents

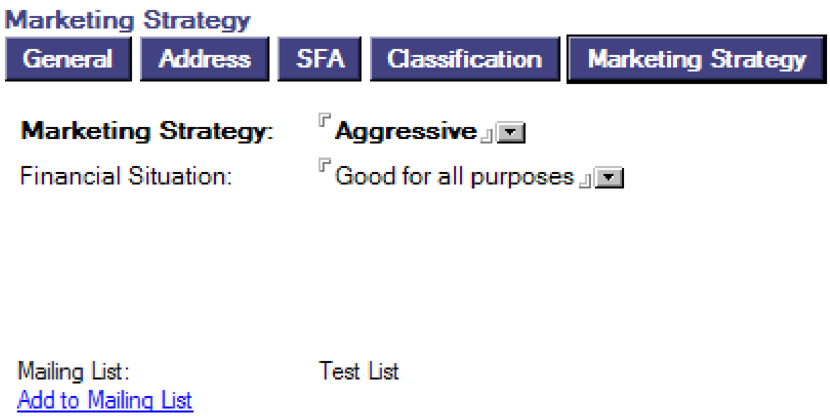
If you have properly configured database security settings, (see Database Security section) users should have the author access to the database without document deletion rights. Then if a user deleted a document using Delete Document icon, the document would be moved to Deleted Documents view. The Database Administrator can remove permanently or undelete this deleted document.

Conflicts

It is strictly administration view designated to manage replication and save conflicts in the database (see Lotus Notes Help for more information).

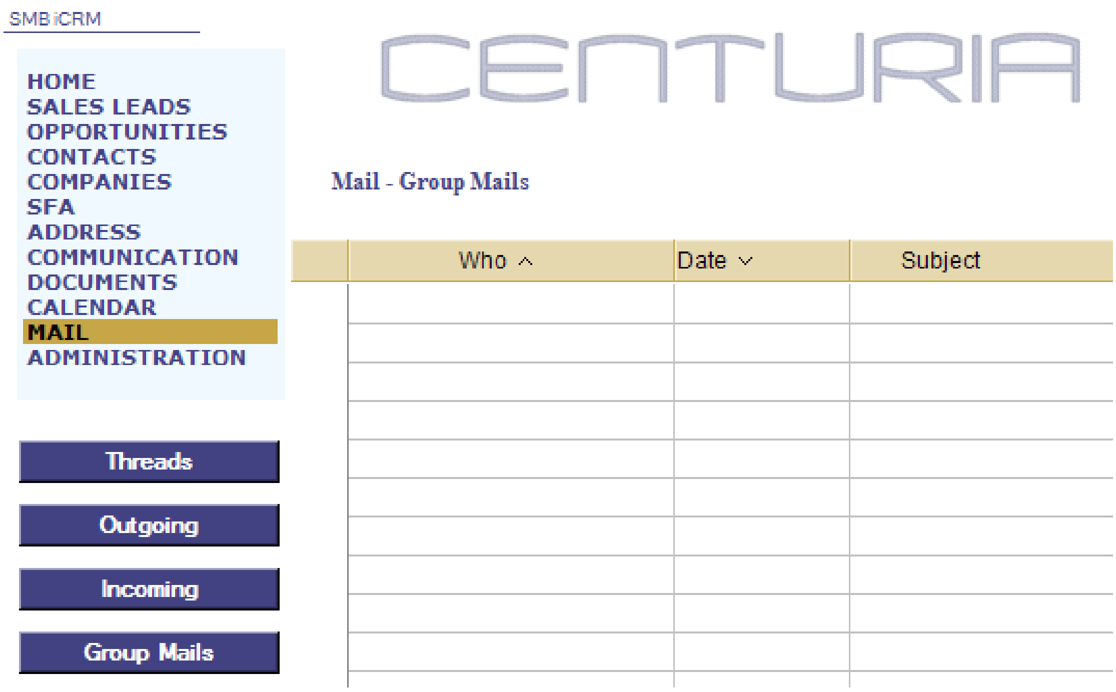
Mailing Lists

Mailing List are documents containing all necessary information for preparing, managing, and sending group mails. You can create it in the Mailing Lists view in the Administration section. For already created Mailing List documents you can add entries directly from Company and Contact documents.



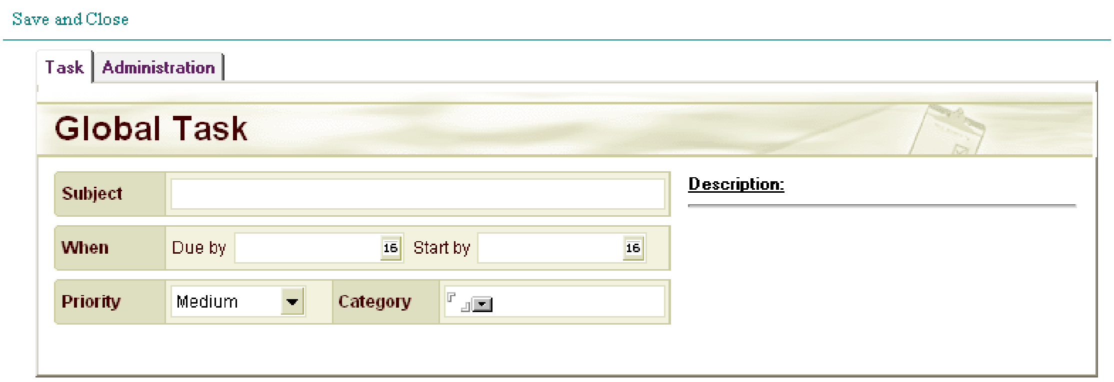
From specific Mailing List you can create new group mails (also from a stationery document) and send it directly from the database.

All group mails sent in this way you can find in Group Mail view in the Mail section.



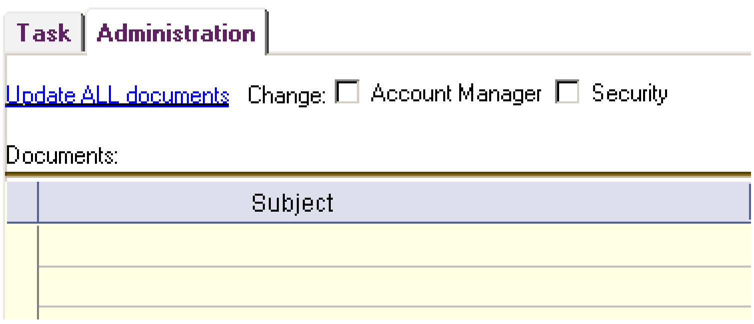
Global Tasks

Global Tasks are designated to allow you to create a group of tasks for a group of companies/contacts and manage all of them from the one configuration document.



To build a Global Task document:

1. Select group of company or contact documents in a view.
2. Click New Global Task action button.
3. Enter basic task description in the Task section. If you have Administrator access for the database you could also change Account Manager and configure access rights for the document.
4. Go to the Administration section.

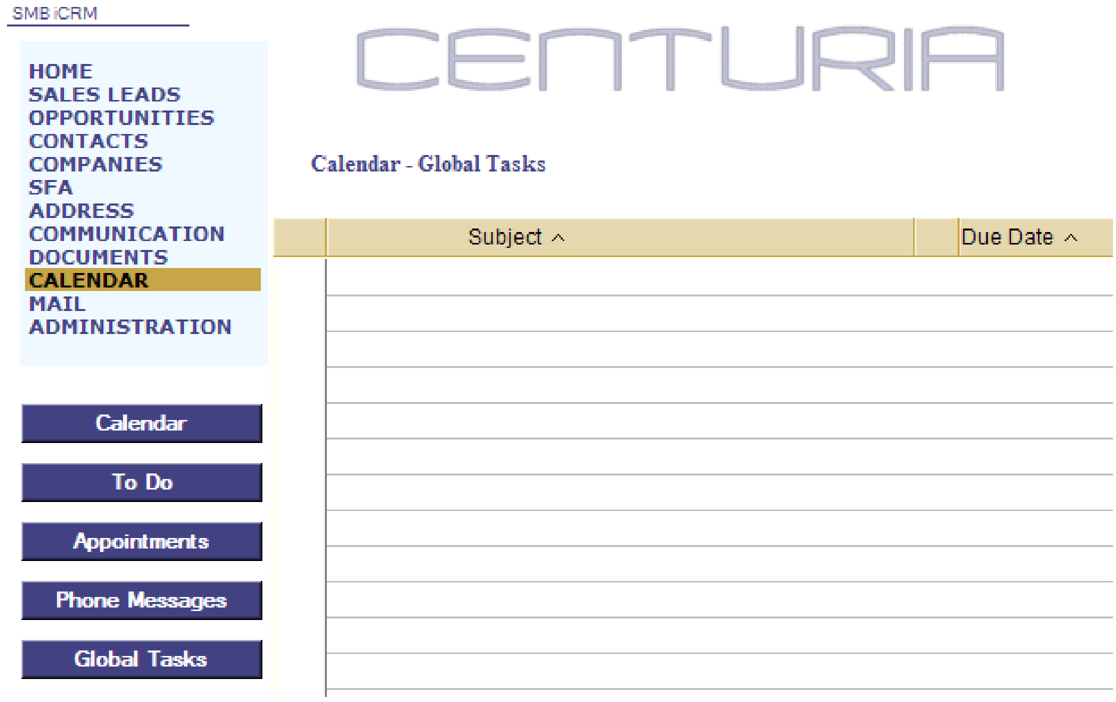


In the Administration section you should be able to see all newly created task documents that are dependant on this Global Task document.

1. If you would like to update Account Manager from the Global Task document click *Account Manager* option.
2. If you would like to update security settings from the Global Task document click *Security* option.
3. Click *Update ALL documents* link.

All dependant documents will be updated automatically.

You will be able to find Global Task documents in the Global Tasks view, which is in the Calendar section.

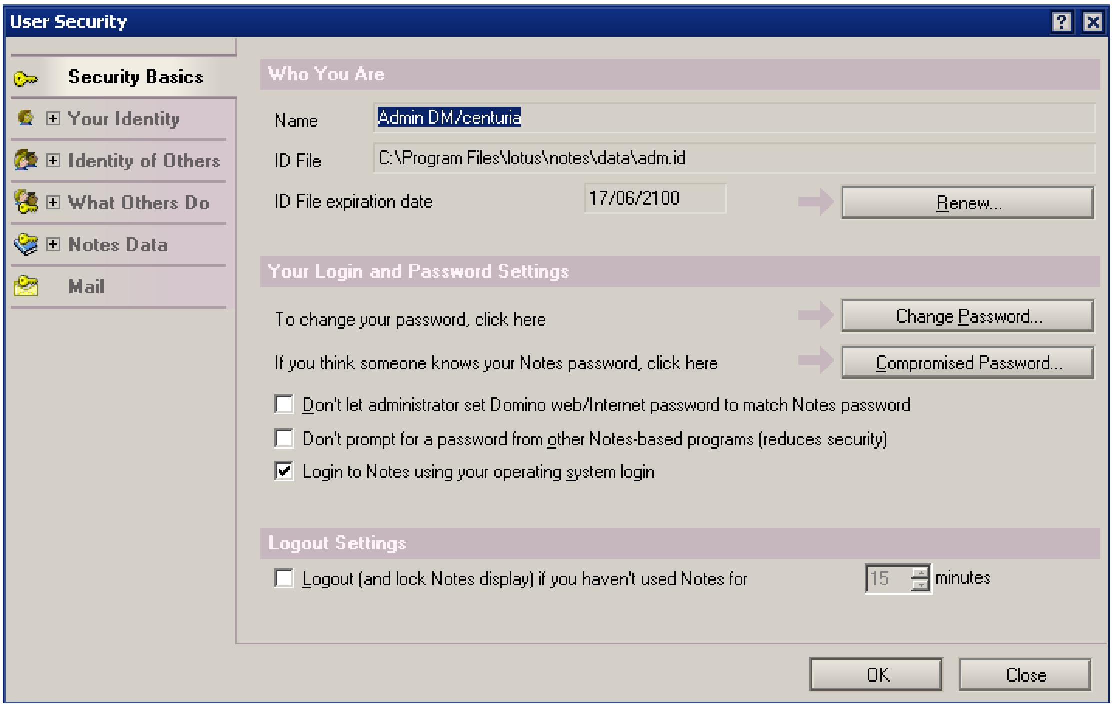

SMB iCRM
CENTURIA
HOME
SALES LEADS
OPPORTUNITIES
CONTACTS
COMPANIES
SFA
ADDRESS
COMMUNICATION
DOCUMENTS
CALENDAR
MAIL
ADMINISTRATION
Calendar
To Do
Appointments
Phone Messages
Global Tasks
Calendar - Global Tasks
Subject
Due Date

Database Security

Database Security is built on the basis of Lotus Notes & Domino security system. Every user connected to the database should have his/her own user ID (user name and password). User ID is defined during the configuration process (see Lotus Notes / Lotus Administration help for more details).

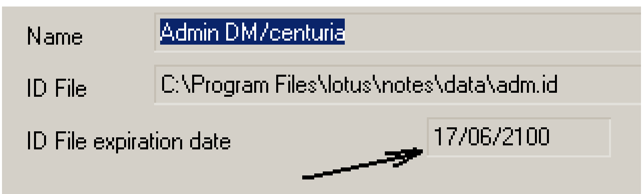
User ID

You can check your security settings by selecting from Lotus Notes menu: File – Security – User Security.



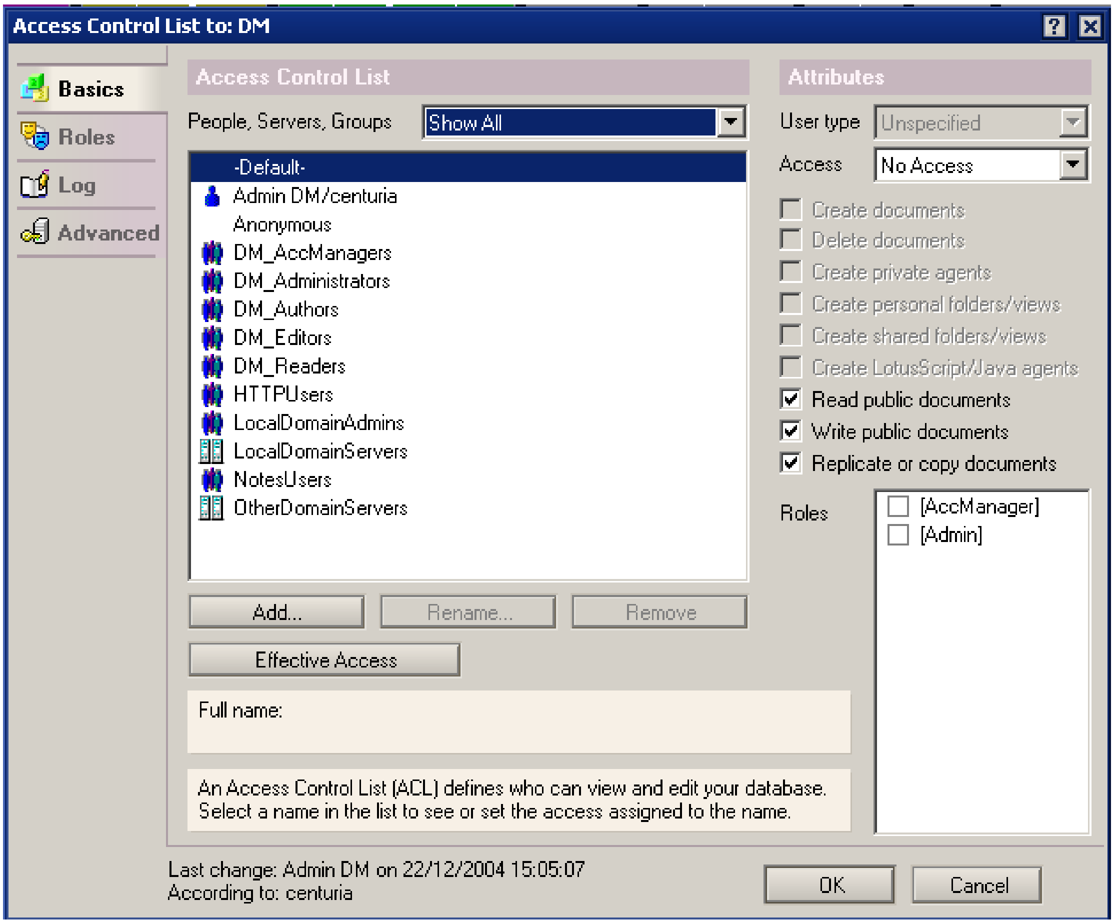
To change your password, click Change Password button.

While using the database, please take care to check your *ID File expiration date*. If your ID has expired you should ask your System Administrator to renew it.

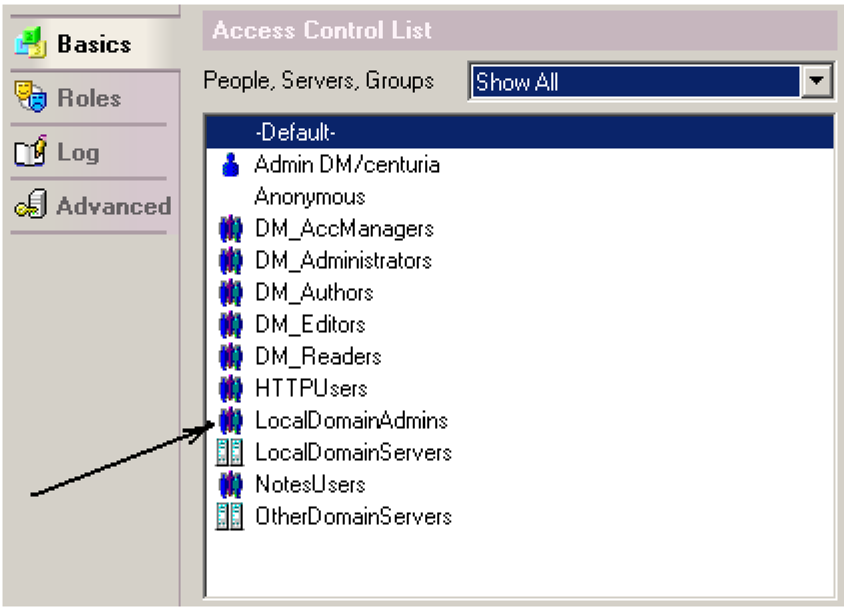


ACL Settings

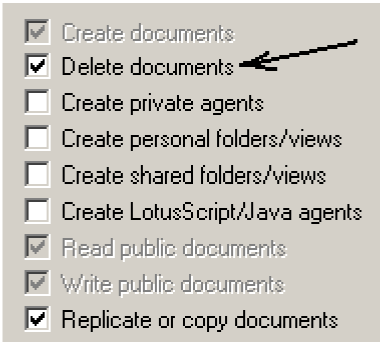
Access Control List (ACL) is a group of settings allowing you to define database specific security settings.
To access ACL, select from Lotus Notes menu: File – Database – Access Control…

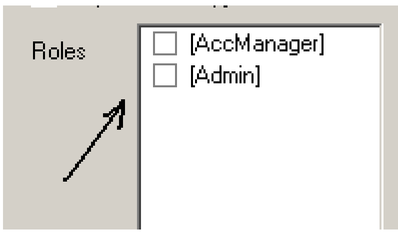


In the Access Control List you have all people, servers, and groups that have defined access to the database.

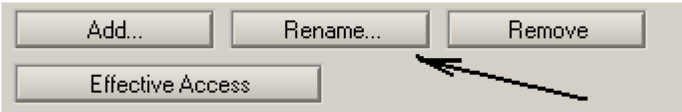


In the Attributes section you can define User type, User Access, and some other privileges. For example, you can give deletion rights for a user.





Using the following buttons, you can add, rename, and remove entries in ACL:



Attributes

1. Create documents
2. Delete documents
3. Create private agents
4. Create personal folders/views
5. Create shared folders/views
6. Create LotusScript/Java agents
7. Read public documents
8. Write public documents
9. Replicate or copy documents

Roles

In the Roles field you can check what roles are assigned to the particular user, server, or group and you can assign any specific roles to every entry.

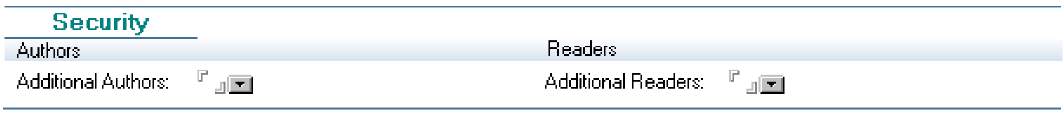
1. [AccManager]
2. [Admin]

ACL Entries

Entry/Group	Access Level	Usage/purpose	Attributes	Roles
-Default-	No Access	to prevent unauthorised access		
Admin DM/centuria	Manager	full right to edit any documents in the database, external recovery access	1,2,3,4,5,6, 7,8,9	1,2
Anonymous	No Access	to prevent unauthorised access from the Internet	9	
DM_AccManagers	Author	to give author access to all Account Managers	1,7,8,9	1
DM_Administrators	Manager	full right to edit any documents in the database, ACL modification rights (Full ACL)	1,2,3,4,5,6, 7,8,9	1,2
DM_Authors	Reader	to give author access to all users allowed to modify theirs own documents	1,7,8,9	
DM_Editors	Editor	full right to edit any documents in the database	1,7,8,9	
DM_Readers	Reader	to give reader access to all other users of the system	7,8,9	
HTTPUsers	Reader	to give reader access to all internet users of the system	7,8,9	
LocalDomainAdmins	Manager	Full ACL	1,2,3,4,5,6, 7,8,9	2
LocalDomainServers	Manager	Full ACL, for replication to work between local servers	1,2,3,4,5,6, 7,8,9	
NotesUsers	Reader	to give reader access to other Notes users	7,8,9	
OtherDomainServers	Reader	to give reader access to other Domino servers, for one way replication with other Domino servers	7,8,9	

Document Security

For document security configuration you can add any available user names to Additional Authors and Additional Readers fields, which usually you would find in the bottom of the document.



Conclusion

SMB iCRM (SMALL BUSINESS CUSTOMER RELATIONSHIP MANAGEMENT)

1. Centuria SMB iCRM™
   The price for this product is for unlimited number of desktops and servers in your whole organization and it is the one time payment with 1-year maintenance included (every upgrade during the year following the purchase date).
   Additional Options in this module are:
   - Simple and easy upgrade
   - Sales Leads and Opportunity Management
   - Contracts and Invoices Repository
   - No advertisements
   - 1 year maintenance

2. Data Miner for Lotus Notes and Domino v. 1.1

   Complex data mining and reporting solution.

   It provides everything what you need to create any possible reports and data analyses. You can retrieve data from any other Lotus Notes/Domino databases and compare/mix it with the data received from SMB iCRM system.

   You will have also:
   - Full access to all database designs with predefined views
   - Export to Excel agent
   - Easy to manage and user friendly reporting system

However, if you or your company would like to have a fuller advantage of this application we could make any specific modifications that you ask us to do for a contracted payment.
If you send us a list of your requirements we would be able to prepare a quotation and send it back to you.

As we mentioned at the beginning of this document, we are always looking to further develop the functionality of the database, so if you have any further requirements or feedback we would like to hear from you.

For any queries please contact us: info@centuria.co.uk.

We really appreciate your interest in this application and would like to hear you again.

If you find this database useful or maybe if you would just like to know about new releases, we strongly advise you to check our web site for news and for new versions of the database:

http://www.centuria.co.uk

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