

YODA: May the sales force be with you !

March 2011



With YODA you can :

- Quickly enter companies coordinates and addresses
- Add an unlimited number of contacts for each company
- Reach the Web sites instantaneously
- Send instantaneously an email to your contacts
- import or export your data towards Excel
- etc....

In spite of its modest and inoffensive air, YODA knows everything and YODA remembers everybody. Discrete but effective, it will help you to conquer new galaxies!

1 Installation

1.1 PC Configuration

- YODA needs Windows XP, Vista or Seven.
- It also needs Framework 2.0 or later, which is installed with Windows, or can be loaded from microsoft sites.
- YODA uses data Jet 2.0 engine from Microsoft which is installed automatically with Excel
- To send emails, YODA uses your default mail client (like Outlook) with its in and out mail storage.

1.2 Files

Only very few files are required to run YODA:

YODA.exe	The program file on which you have to click to start application
YODA.ini	File containing your personal parameters.
YODA.mdb	ACCESS data base file, containing all date. Make copies of this one to secure your data.

1.3 Installation

1. Download the ZIP file to your desktop

2. Uncompress ZIP file
3. Click right on the YODA “application” file and create a shortcut
4. Move the shortcut to you’re your desktop

Yoda is ready to use!

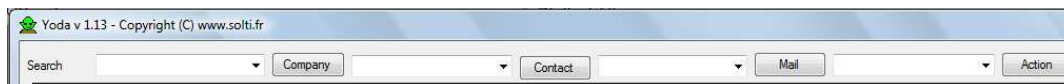
2 Company form

2.1 General description

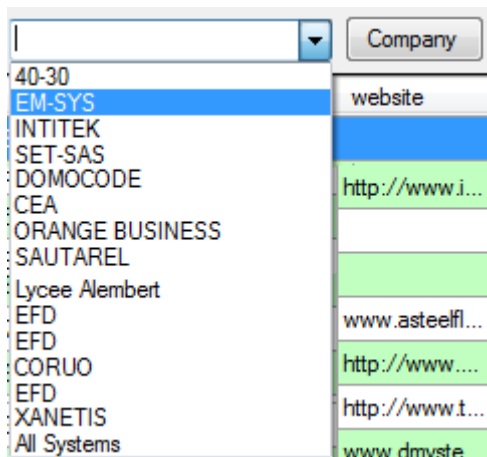
The home page is composed of 3 areas:

- Search panel on the top
- Data grid in the middle
- Command buttons on the right

2.2 Search panel



It is possible to find instantaneously any record, simply by entering part of the desired text string. To look for a company name, use the first combo box, for contact use the second, for a mail address the third and the last for any word contained in the dairy texts.



The last searched names always are stored in the list to save your time.

To restore the complete display of all companies, use the refresh button or enter a single character in any of the search combobox

2.3 Data grid

Each company is listed in a row. When you click on the top of each column, you change the order of the list.

When you click into a company description, you open the contact form, to see the detailed information or to modify something.

When you click on the Website cell you open a browser on the company site.

When you click on the Documents cell, you open a browser on the local company documents directory.

	id	name	website	activity	status	lmeeting	rmeeting	address	zip	city	state	country	documents	actions
	618	EM-SYS		Embedded	0	17/03/2011	17/03/2011		0	Genève				17/03/...
	617	DOMOCODE	http://www....	RADIO	0	17/03/2011	17/03/2011		0					DOMOCODE S.A...
	616	SAUTAREL	http://xtrema...		0	16/03/2011	16/03/2011		0					DJ virtuel sur IPO...
	615	XANETIS	www.croque...		0	15/03/2011	15/03/2011		0					15/03/...
	609	ORTHOTAXY	www.orthota...		0	14/03/2011	14/03/2011	63 ro...	38410			SAIN...	C:\	Suite a votre can...
	608	PRESTATAIRE			0	14/03/2011	14/03/2011		0				C:\	16/03/...
	607	McPhy	http://www....		0	14/03/2011	14/03/2011		0				C:\	15/03/...
	606	CORIAL	www.corial.net		0	14/03/2011	14/03/2011	11, ...	38240			MEYL...	C:\	14/03/...
	605	partners			8	11/03/2011	11/03/2011		0				C:\	DotNet DBA VBA...
	604	SOPRAGROUP	www.sopragr...		0	03/03/2011	03/03/2011		0				C:\	03/03/...
	603	REXOR	www.rexor.c...		0	02/03/2011	02/03/2011		0				C:\	02/03/...
	602	Binet	http://www....	Simulation d...	0	01/03/2011	01/03/2011		0				C:\	04/03/...
	601	PLASMA Solutions	http://www....		0	21/02/2011	21/02/2011		0			UK	C:\	21/02/...
	600	IDEAS laboratory	http://www.i...		0	21/02/2011	21/02/2011		0			GRE...	C:\	Bonjour Ideas La...
	599	CREMHyG		Laboratoire	0	19/02/2011	19/02/2011		0					Directeur du labo...
	598	PHILOG		SSI	8	18/02/2011	18/02/2011	46, r...	75009			Paris		22/02/...
	597	AstelFlash Developpem...	www.asteeff...		0	17/02/2011	17/02/2011		0			MEYL...		20 personnes @...
	596	BOBST	http://www....	Automatismes	0	16/02/2011	16/02/2011		0			Lausa...		Lean Project Ma...
	595	Deltadore Trilogie	http://www.t...	Domotique	0	15/02/2011	15/02/2011		38240			MEYL...		15-2-2011Ancien...
	594	Dmysteam	www.dmyste...		0	14/02/2011	14/02/2011		0					JINN Corp http://...
	593	CS			0	14/02/2011	14/02/2011		0					J'ai vu une offre ...
	592	Softetservices	http://www.s...	SSI	0	09/02/2011	09/02/2011	1161...	13720			Vitrolles		Suite a notre con...
	591	EL SYS Design	www.elus-d...		0	04/02/2011	04/02/2011		0					Mouvement pour...

ID

Identification number. It cannot be modified. It makes possible to change the name of a company, without moving the people inside !

Name

Company name.

Website

Company URL

Activity

A couple of words to describe company business. There is no limitation or controls on this field.

Status

Simple numerical indicator from 1 to 8, that can be used to know how far you have been with this company. 0 stand for no contacts yet, 8 can be used for urgent action required!

Last meeting

The day you actually made the last contact: phone, mail or interview

Next meeting

The day planned to make a new action

Adresse, Zip, City, State

Complete address.

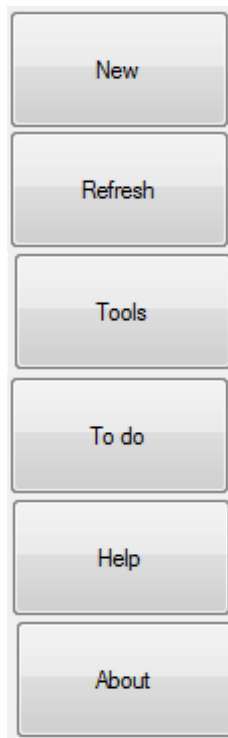
Actions

This is the place where you can type anything you want. Usually, you add a block of text every time you do something.

You can cut and paste any part of documents such as mails, word, etc..

You can always rewrite, modify or clean the text of your "actions diary" to keep it simple and updated.

2.4 Buttons



This button is used to create a new company

This button is used to refresh data when YODA is shared in your local network.

This button is only for experts which needs to execute advanced functions

This button searches for companies that have a status over 7 (urgent action required) or a Next meeting planned for a passed day.

This buttons displays this help document

This buttons displays editor information, number of companies and contacts recorded

3 Contacts form

3.1 General description

The contact page is composed of 4 areas:

- Company data on the top
- Contacts data in the middle
- Actions diary at the bottom
- Command buttons on the right

The screenshot shows a web application window titled 'Modifier'. It contains the following elements:

- Company data section:** Fields for Company (Solti), Activity (Software Company), Address (37 rue des muriers), Zip code (38180), City (Seyssins), State, Country (FRANCE), Status (8), Previous meeting (06/03/2011), and Next meeting (13/04/2011). There are also buttons for 'Web site' (www.solti.fr) and 'Documents'.
- Contacts section:** A table with columns: id, lname, fname, current_position, mail, tel1, tel2, id_compan. It lists three contacts: 895 (ISS, Laurent, Gérant), 896 (GERNIER, Emmanuel, Manager), and 897 (VALLES, Christine, Dir Commerci...). Contact 897 is selected.
- Actions section:** A text area containing a diary of actions, including dates like 06/03/2011 and 06/03/2010, and descriptions of company activities.
- Right sidebar:** A vertical stack of buttons: 'Delete contact', 'Mail', 'Copy', 'New action', 'Save', and 'Close'.

3.2 Company data

The company data can be anything you want. A the unique ID is used for management, you can change company name, address, etc..

without any danger for your data security. The Document button enables you to assign a local directory to store documents attached to this company.

3.3 Contacts data

Just by entering text in the blank line, you create a new contact.

The number of contacts is unlimited, although the screen is designed for 5 or 6, you need to use the scroll bar.

For a large company, you can create company departments in order to reduce number of contacts in a group.

A click on the heading of each column changes the order of the list.

ID

Identification number. It cannot be modified. It makes possible to change the name of a contact, without changing data attached.

LName

Last name of the contact.

FName

First name of the contact.

Current_Position

Position, function of the contact

Mail

Mail address, used by the "Send mail" button.

Tel1, Tel2

Phone numbers

Company_id

Company unique identifier. By changing it, you can attach the contact to another company.. be careful!

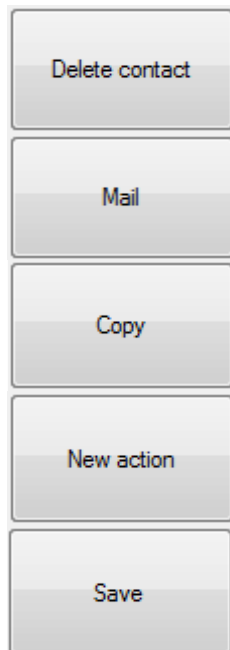
Actions

This is the free text zone. You can cut and paste text from any other application.

It is recommended to adopt some simple filling rules to keep things clean and ordered.

Is is recommended not to use " , ' or any special character that the date base manager may not like.

3.4 Buttons



This button is used to delete a contact. To do so, you must first selected it clicking on the left header of selected line.

This button calls your default mail client and opens a new mail, ready to send with the address filled. You can use the cut/paste feature of Windows to move parts of your mail into the actions text area.

This button enables you to put all the text of this form into the clipboard for future use in a mail or in any document...

This button enters a date and a separator into the diary text area, to organize your text notes.

This buttons makes sure that you do not lose the data modified. Closing the form also saves data.

4 Tools form

4.1 General description

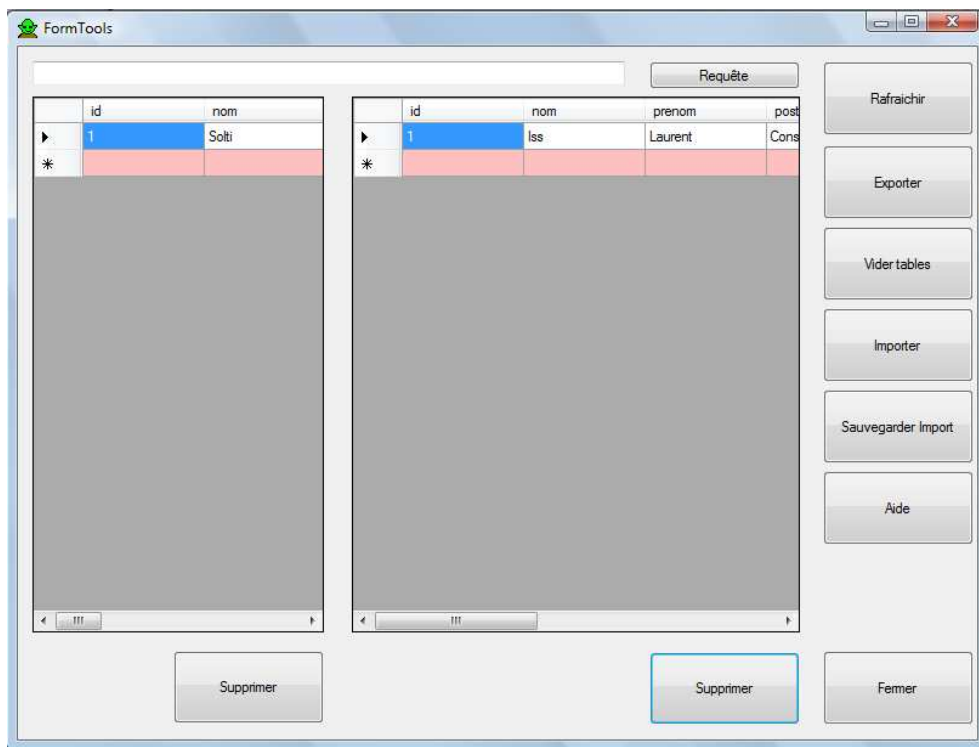
This page is for experts only.

It gives access to powerful but dangerous operations that may damage your data.

The tools form is composed of 3 areas:

- Send an SQL request on the top
- Display and modify data in the middle
- Command buttons on the right

As a beginning, just use the Refresh and Export buttons which do not change contained data.

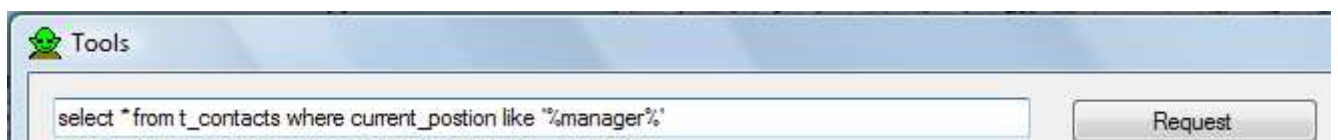


4.2 SQL requests

The text window is used to type in the request. You need to be familiar with SQL syntax.

The table's names are t_companies and t_contacts.

SQL enable you to make almost any kind of search or modification.

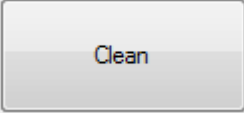
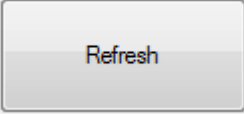
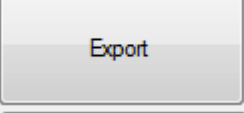
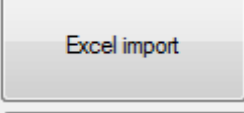
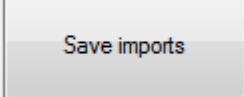


4.3 Data area

Using Import and refresh button, you can read data from CSV files.

The file format has to comply the table formats displayed when you try the import button. Manual changes are not accepted, only delete commands are effective.

4.4 Command buttons

	Removes all the content of tables. To use only if you control the importation/exports or if you have a copy of YODA.mdb.
	This button is used to refresh date when YODA is shared in your local network.
	Send all data to an Excel file. This file can be used as a model for importation.
	Reads data from an Excel file. ID in double are refused. Try Export first to check your Excel file format.
	When the imported data are correctly displayed, this button carries out the effective writing into data base. Make small tests with a couple of lines before launching a large integration.

5 Maintenance

Carry out regular backups of your database.

You just need to copy the YODA.mdb file towards another support, or to rename it.

To print reports/ratios, states or other... you can use Excel export.

For advanced features, you can use ACCESS, included in Professionals Microsoft Office.

For any question, about YODA and its upgrades, contact info@implesoft4all.com

6 FAQ

6.1 Why ?

YODA meets 3 different needs:

- It replaces Excel, adding friendliness and reliability
- It enables you to share your contacts within your network
- It opens your data to the exciting SQL database world, which enables connection with the entire world

Advantages of Excel sheets are:

- low cost, simple, efficient, easy to display and to print

Disadvantages of Excel sheets are:

- dangerous to type in data, hard to write and maintain macros, difficult to share

Advantages of advanced CRM are:

- integrates anything you need, connected to all your company's data and colleagues
- Disadvantages of advanced CRM are:
- complex, expensive, requires training and administration

YODA groups 80% of the functions you need to manage your commercial contacts.

Based on Windows .Net standards, it is a totally open solution which evaluates from a simple Excel data sheet to powerful and intelligent agent integrated into you IS.

6.2 How to print ?

Printing is not ecological. You probably have your own company formats and you do not want to spend time configuring a print tool.

That is why we suggest to use an Excel export that you can integrate in your own documents.

6.3 Multi-users ?

The use of YODA on a shared data base does not require any special knowledge or hardware.

We also provide synchronization tools for people using YODA on remote computers, in disconnected mode.

6.4 Limitations?

The free YODA is limited to 50 companies.

The number of contacts is unlimited.

With a professional license, you can have an unlimited number of companies and contacts.

6.5 Why this name?

YODA is small thing that does not look impressive, but is always with you to provide information in a simple click.

YODA is a registered trademark of LucasFilms.

6.6 Evolutions ?

YODA is an open solution which has already been enriched with specific features such as :

- connection to your own company servers
- customized data format
- optimized user interfaces for specific activities
- customized SQL search requests

Everything is possible, for very reasonable development costs.

Using « agile » methodology, you are sure to get exactly what you want.

You don't have to pay for extras you won't use

7 Maintenance

Make regular backups of your data, as mdb file copies or using Excel Exports.

YODA application can easily be moved to another PC, you just have to copy the complete working directory.

Regularly check for new version on www.simplesoft4all.com.

For any question, do not hesitate to contact us info@simplesoft4all.com