

Standard CRM



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INTRODUCTION

Installing Standard CRM Application

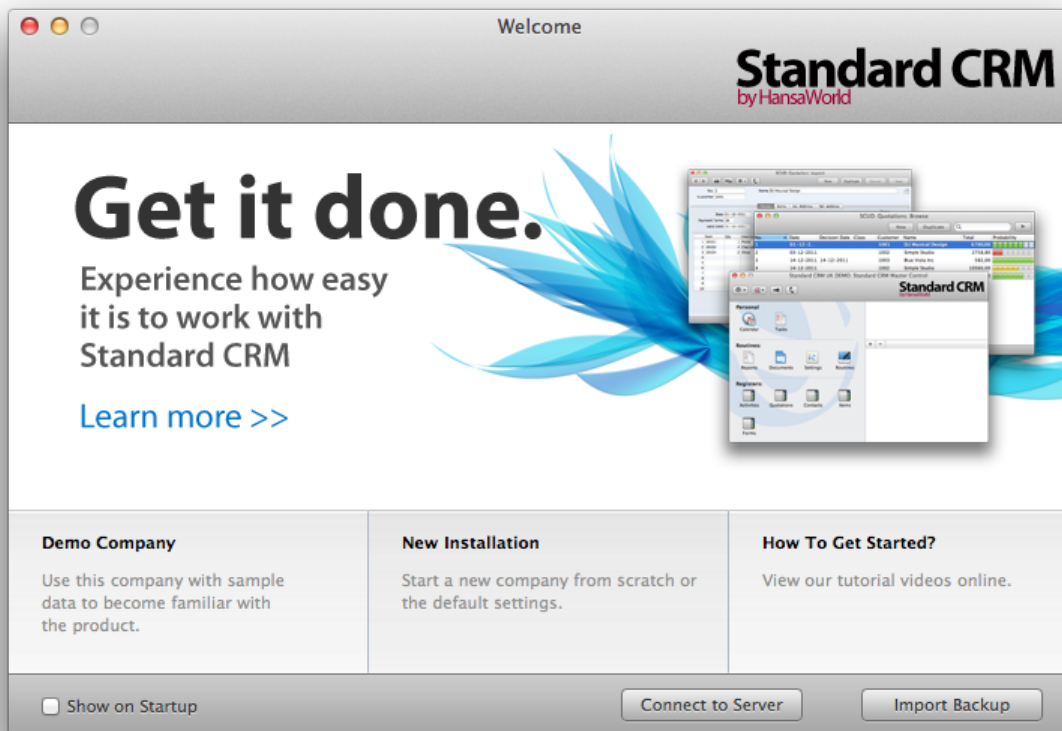
The application can be found on App Store, the main category Business. The application is installed by clicking the 'Buy' button.

The application is supplied as an automatic installation package: once downloaded from the App Store, the installation process starts. The application is installed into your Applications folder. The next step is to launch the application for the first time.

Starting the application for the first time

Standard Nominal Ledger is installed to you Applications folder. Start the application by double clicking the Application icon.

The Welcome window will be displayed. In this window you can choose how do you want to start working. With Demo Company in order to securely test different functions or with an empty database to start entering your own data.

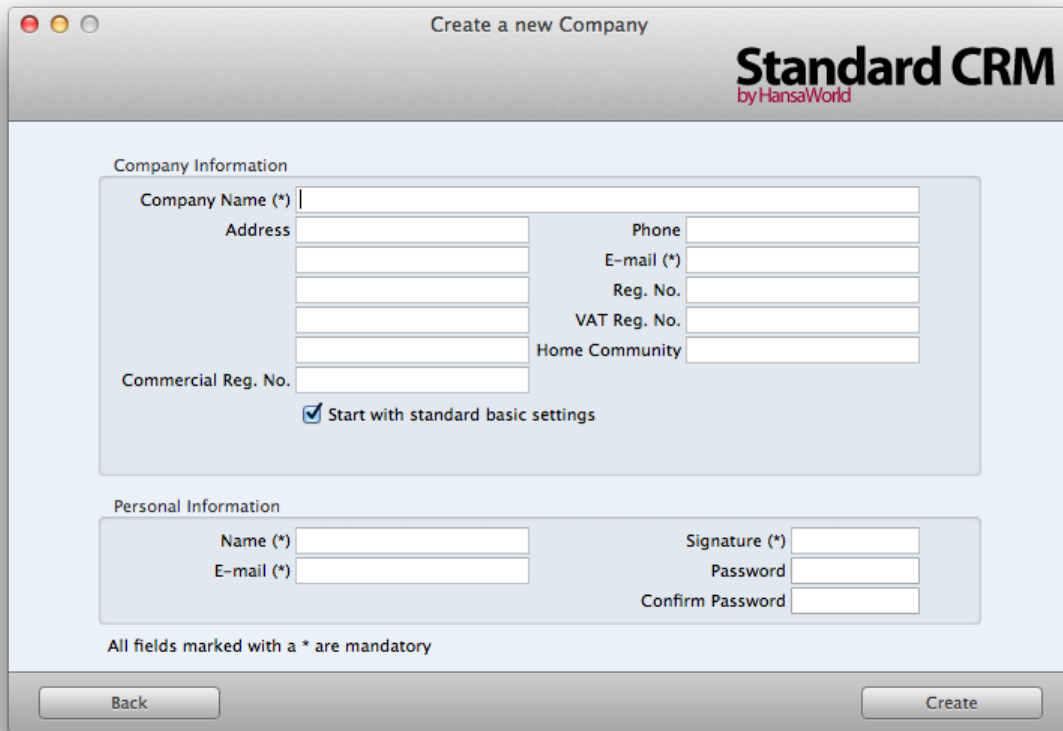


Demo Company

If you choose the Demo Company option, you can login with the User SJ and no password. You can test and practice functions with this demo.

New Installation

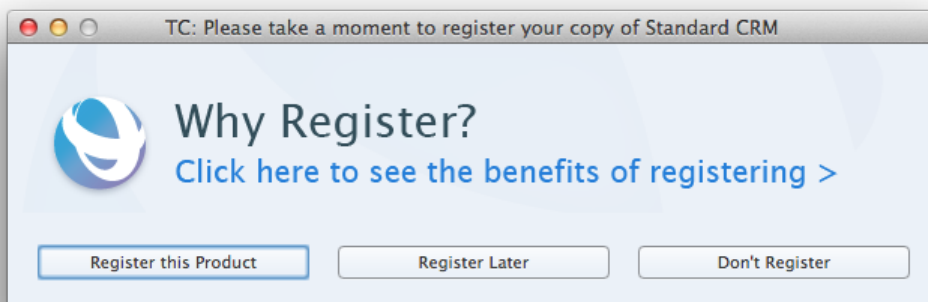
If you select the New Installation button, the 'Create a new Company' window will appear on screen.



Enter your company details in the upper section.

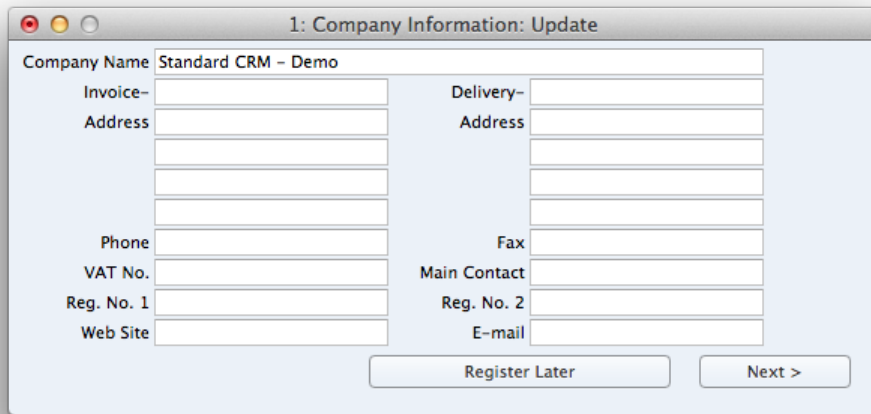
The information in the lower section will be used to create an User Account for yourself. You must enter your Name and a Signature before you can proceed to the next step, but the other information is optional. The Signature is the ID code that you will use to log in.

When the window is complete, click the [Create] button in the bottom right-hand corner of the window. After pressing the [Create] button, the 'Register Button', as shown bellow will appear:

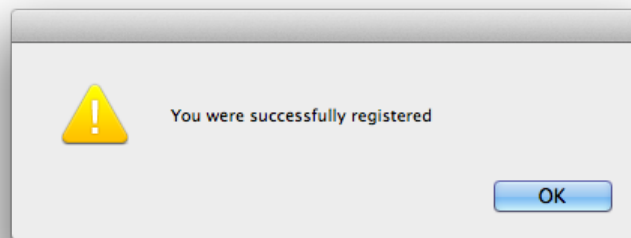


You can choose to Register the product, Register Later or Don't Register.

If you choose option 'Register this Product' following window will show:



After having all the information filled in, press button [Next], and the system will give you the message ' You were successfully registered'



press the [ok] button and the master Control Panel will show. You are now ready to start using the program.

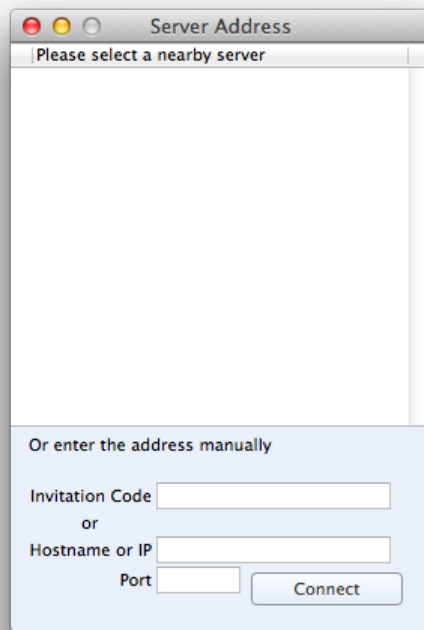
If you choose to Register later you will be taken directly to the Master Control Panel. Please refer to the 'Registering Your Product' section for more information about this option.

How to get started

Click this button to view tutorial videos online. A webpage with tutorials for Standard family of products is opened.

Connect to Server

If you select the Connect to Server button, the 'Server Address' window will appear on screen



Double-click the server in the list that you want to log in to, or click once and then click the [Connect] button. If the server is not listed in this window, enter the IP address of the server and port in the IP and Port fields, and press the 'Connect' button.

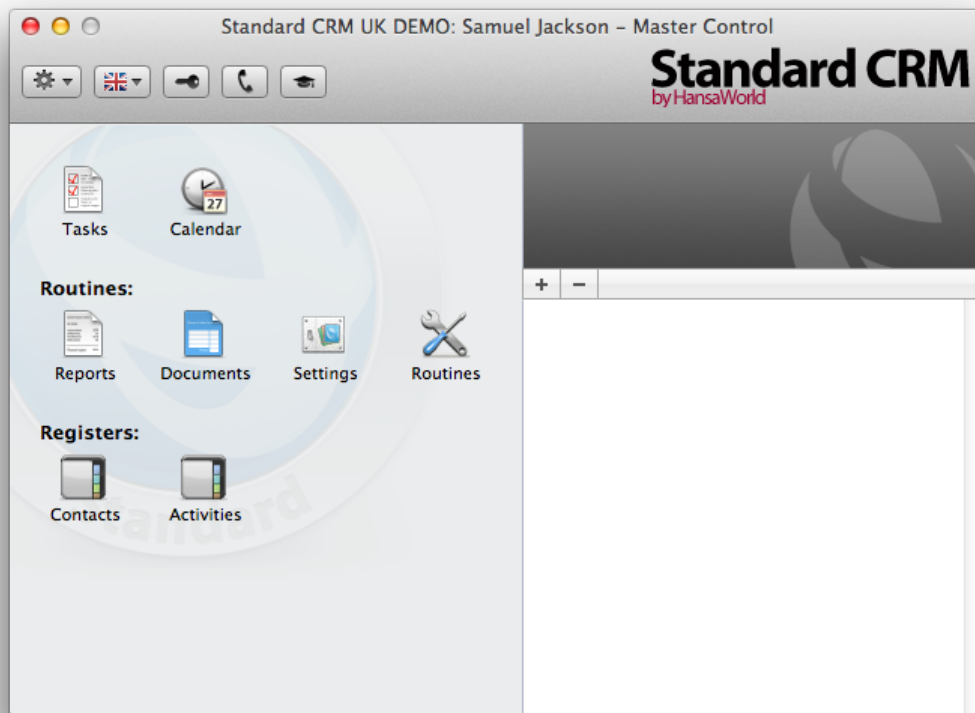
Import Backup

Click this button if you have already been using a Standard product before and you need to import a back-up file to a new database.

An Import dialogue window will be opened and you will need to select the backup file you want to import.

Master Control Panel

The Master Control panel is your main tool palette. This is where you can open different registers, settings, documents and reports.



You can open the Master Control panel, or bring it to the front at any time using the ⌘-M keyboard shortcut.

WORKING WITH RECORDS

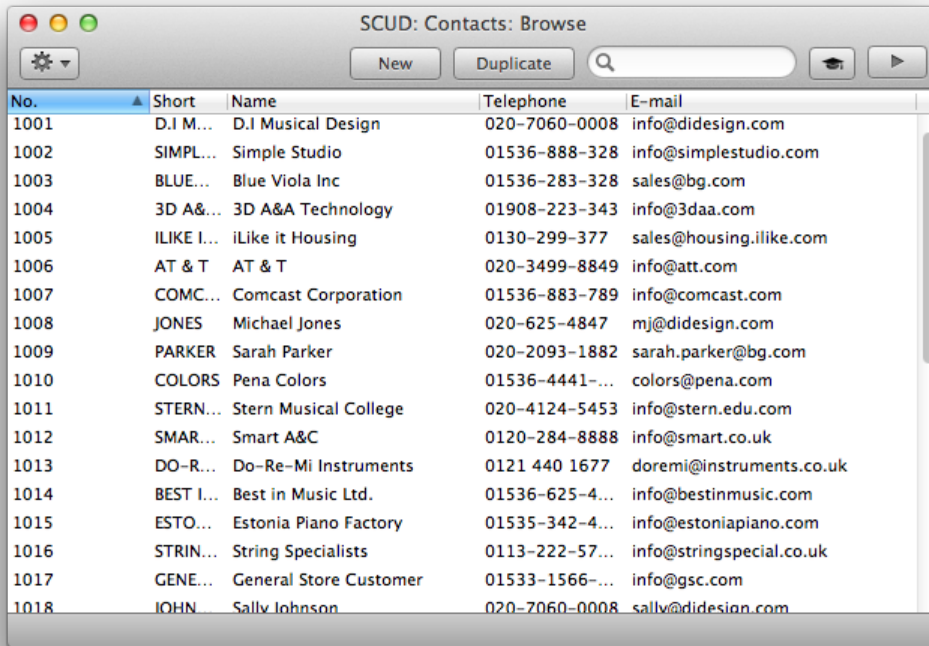
Registers

Standard CRM contains a number of registers in which information of a particular type is stored. For example, information about Customers is stored in the Contacts register, while information about Activities is stored in the Activities register.

You can open the registers by using the buttons in the Master Control panel.

Browse Windows

When you open a register, a browse window will open, listing all the existing records in the register.



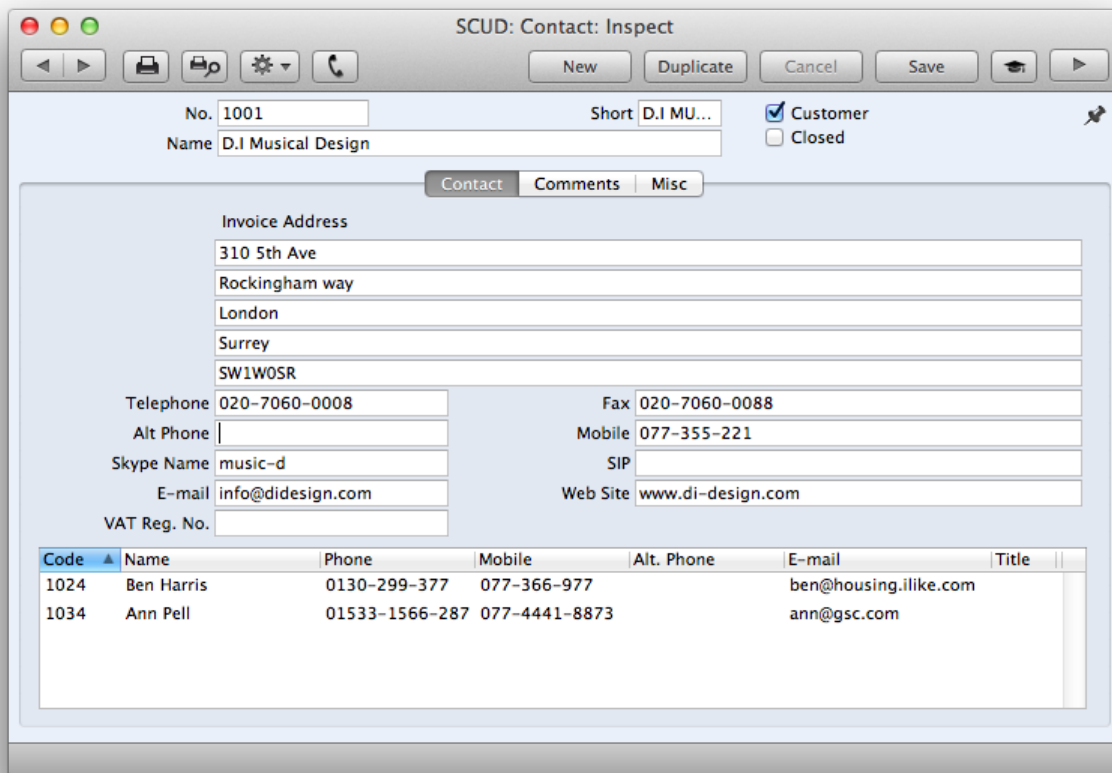
No.	Short	Name	Telephone	E-mail
1001	D.I M...	D.I Musical Design	020-7060-0008	info@didesign.com
1002	SIMPL...	Simple Studio	01536-888-328	info@simplestudio.com
1003	BLUE...	Blue Viola Inc	01536-283-328	sales@bg.com
1004	3D A&...	3D A&A Technology	01908-223-343	info@3daa.com
1005	ILIKE I...	iLike it Housing	0130-299-377	sales@housing.ilike.com
1006	AT & T	AT & T	020-3499-8849	info@att.com
1007	COMC...	Comcast Corporation	01536-883-789	info@comcast.com
1008	JONES	Michael Jones	020-625-4847	mj@didesign.com
1009	PARKER	Sarah Parker	020-2093-1882	sarah.parker@bg.com
1010	COLORS	Pena Colors	01536-4441-...	colors@pena.com
1011	STERN...	Stern Musical College	020-4124-5453	info@stern.edu.com
1012	SMAR...	Smart A&C	0120-284-8888	info@smart.co.uk
1013	DO-R...	Do-Re-Mi Instruments	0121 440 1677	doremi@instruments.co.uk
1014	BEST I...	Best in Music Ltd.	01536-625-4...	info@bestinmusic.com
1015	ESTO...	Estonia Piano Factory	01535-342-4...	info@estoniapiano.com
1016	STRIN...	String Specialists	0113-222-57...	info@stringspecial.co.uk
1017	GENE...	General Store Customer	01533-1566-...	info@gsc.com
1018	JOHN	Sally Johnson	020-7060-0008	sally@didesign.com

For example, if you click the [Contacts] button in the Master Control panel, the window that opens is a browse window, entitled 'Contacts: Browse'. This window lists all the Customers in the register:

In all browse windows you may sort the records in each column by clicking on the headings. To reverse any sort, simply click once again on the column heading. You can also scroll down the list with the scroll bars. Finally, you can search for a record by entering a keyword in the field in the top right-hand corner. Standard CRM will search for the first record matching the keyword in the highlighted column.

Record Windows

You will use record windows to enter, view and edit individual records. All data entry will be made in windows of this type. Shown below is a Contact in a record window:



SCUD: Contact: Inspect

No. 1001 Short D.I MU... Customer
 Closed

Name D.I Musical Design

Buttons: New Duplicate Cancel Save

Tabs: Contact Comments Misc

Invoice Address

310 5th Ave
 Rockingham way
 London
 Surrey
 SW1W0SR

Telephone 020-7060-0008 Fax 020-7060-0088
 Alt Phone Mobile 077-355-221
 Skype Name music-d SIP
 E-mail info@didesign.com Web Site www.di-design.com
 VAT Reg. No.

Code	Name	Phone	Mobile	Alt. Phone	E-mail	Title
1024	Ben Harris	0130-299-377	077-366-977		ben@housing.ilike.com	
1034	Ann Pell	01533-1566-287	077-4441-8873		ann@gsc.com	

All record windows feature the following buttons:

[New] Keyboard shortcut: ⌘-N

Click this button to save the current record and to close it. A new blank record will then be opened for data entry.

[Duplicate] Keyboard shortcut: ⌘-Y

Click this button to save the current record and to create a copy of it. The original record will be closed and the new copy opened. In many cases, the new record will contain the current date, not the date of the copied record.

[Cancel]

If you have not saved the current record (i.e. the window title is 'New'), click this button to cancel the data entry process and to close the record window. The record will not be saved. If you have previously saved the current record (i.e. the window title is 'Update'), click this button to discard all changes made since it was last saved. In this case, the record window will not be closed.

[Save] Keyboard shortcut: Shift-Enter

This button saves all changes to the current record but does not close it.

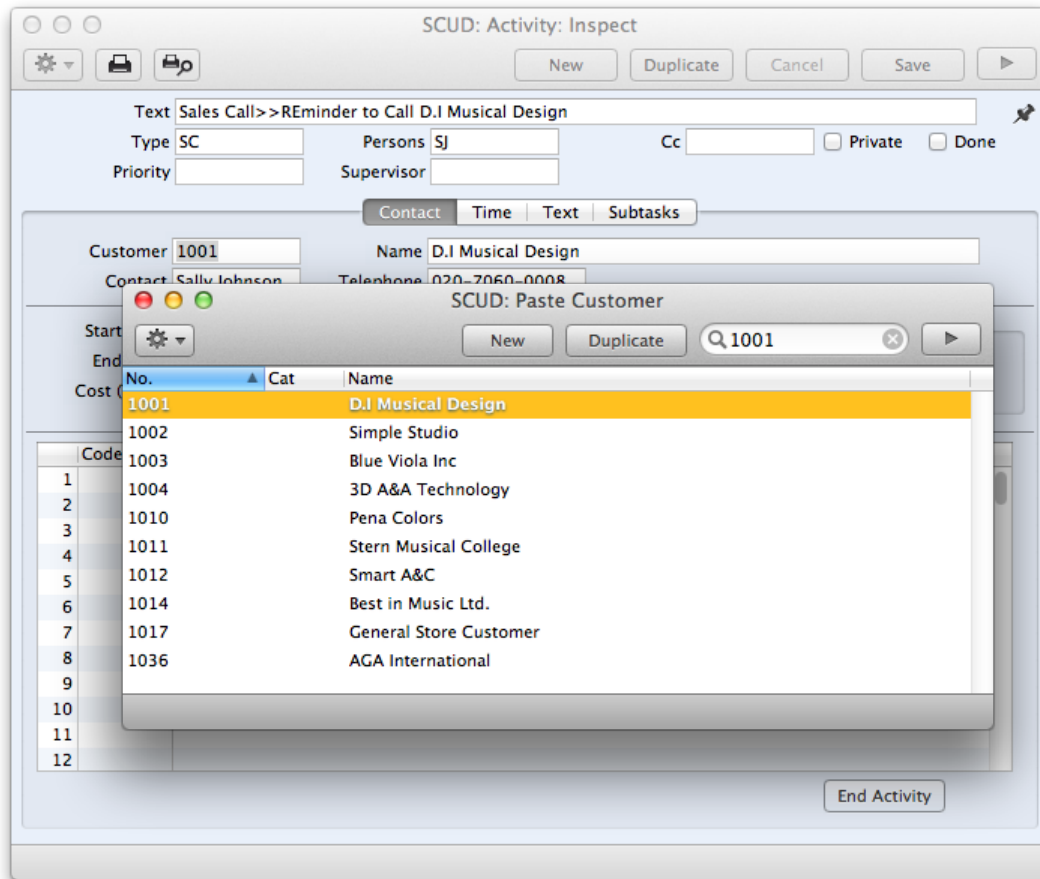
Click this button



to connect to our website, where you can see a short tutorial demonstrating how to use the register you are looking at.

Record Windows - Paste Special

You can use the 'Paste Special' feature in many fields to bring information into a record from another register or setting. For example, when you enter an Activity, you can use 'Paste Special' to choose a Customer. The following example shows how this feature works, pasting a Customer Number into an Activity:



Deleting Records

To delete a record, open it in a record window and select 'Delete' from the Record menu.

ATTACHMENTS AND PERSONAL DESKTOP

Attachments

You can connect files, notes or other records to any record in Standard CRM. These connected objects are known as "Attachments".

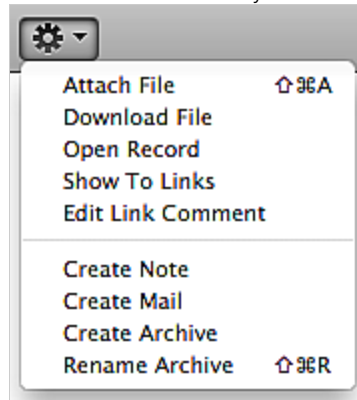
All record windows contain an [Attachments] button in the top right-hand corner:



If a record has at least one Attachment, the button has a different icon:



Click this button to work with Attachments. A list of objects currently attached to the record is opened. This list has its own Operations drop-down menu, which contains the functions necessary to attach, view and remove Attachments:



You must save a record at least once before you can add any Attachments. You can attach the following items to records of all kinds:

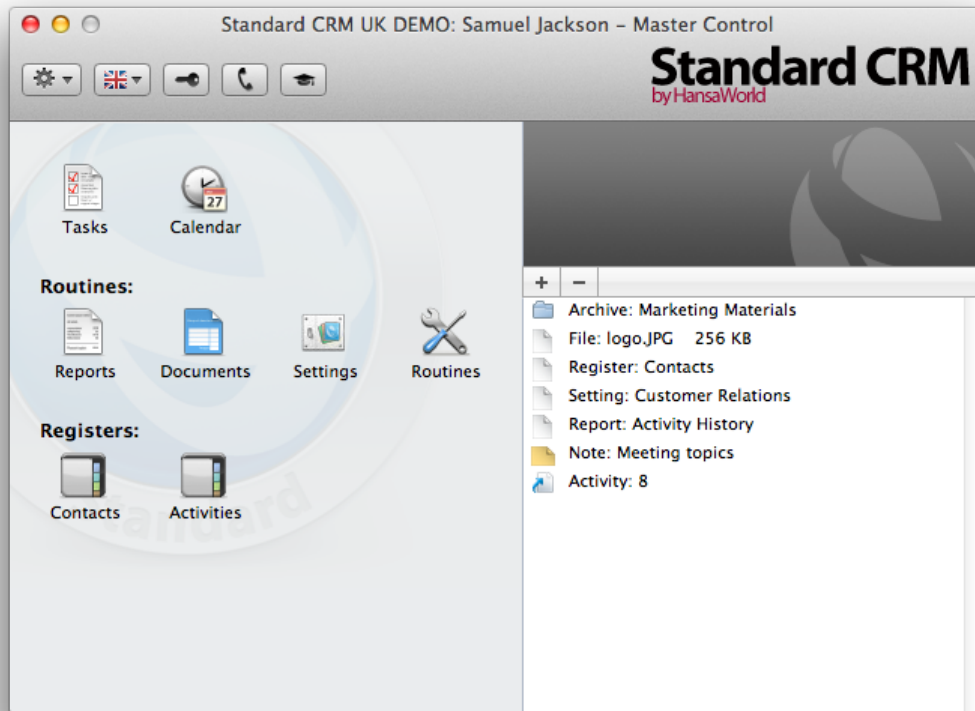
- Files** - Open the list of attachments and choose 'Attach File' from the Operations menu. A standard 'Open File' dialog window will open, allowing you to locate the file that you need.
- Notes** - Open the list of attachments and choose 'Create Note' from the Operations menu. A window will open, where you can type in your note/enter a Comment (the text that will identify the note in the list of Attachments).
- Records** - You can attach a record to another record by dragging it from its browse window onto the [Attachments] button of the other record. If the record is already open, drag its [Attachments] button onto the [Attachments] button of the other record.

To open or read an Attachment, double-click it in the list of Attachments or select 'Open Record' from the Operations menu. If the Attachment is a file, double-click it or choose Operations menu function 'Download File' to save it to your hard disk or use 'Open Record' to open it in the relevant application.

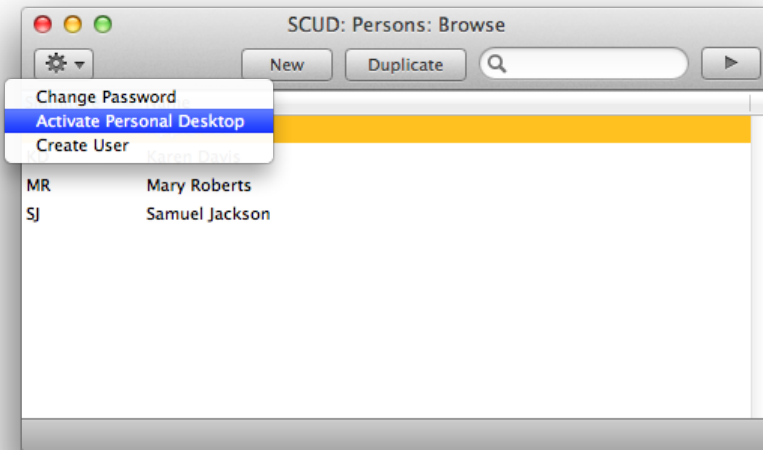
To remove an Attachment of any kind from a record, highlight it in the list of Attachments and select 'Clear' from the Edit menu.

Personal Desktop

As well as being able to connect files, notes or records to any record (as described above), you can also attach them to your Master Control panel. They will be listed in the area on the right of the Master Control panel, known as the "Personal Desktop". You can also place important reports, documents, settings and registers in the Personal Desktop. You can therefore configure your Personal Desktop so that it gives you immediate access to the areas that are most important to you. The Personal Desktop is therefore similar to a list of Bookmarks in a browser.



When you create the first User Account in a new database, the Personal Desktop will be activated for that User automatically. If you add extra Users to the Persons setting, you will need to activate the Personal Desktop for those Users yourself. Use the 'Activate Personal Desktop' function on the Operations menu of the 'Persons: Browse' window.



You can place the following items in your Personal Desktop:

Registers - Drag registers from the Master Control panel to the Personal Desktop.

Settings, reports, documents and export functions - Open the appropriate list window (e.g. the 'Reports' list or the 'Documents' list) and then drag an item from the list to the Personal Desktop.

Files - Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Attach File'. A standard 'Open File' dialog window will open, allowing you to locate the file that you need.

Web Links - Click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Create Web Link'. A window will open where you can specify a name for the link and the URL (web address). You should also choose "Inline" or "External" in the Open field, using 'Paste Special' (⌘-Enter). If you choose "Inline", the web page will be opened in a new window inside Standard CRM when you double-click the web link. If you enter "External", the web page will be opened in your default browser.

Organising Items in your Personal Desktop - Archives

When you have many items in your Personal Desktop, you can organise them into Archives. An Archive is a folder that can contain Attachments of all kinds, including other Archives.

To create an Archive, click the [+] button in the top left-hand corner of the Personal Desktop and choose 'Create Archive'. The 'Create Archive' window opens, where you can give the new Archive a name.

When you click the [Save] button, the new Archive will appear towards the top of the Personal Desktop.

To move the relevant items into the Archive, double-click on the Archive and drag and drop the item in the Archive window.

If you want to work with an item that is in an Archive, double-click the Archive. A new window will open, listing the items that are in the Archive.

If you want to rename the Archive, first open it as described above and then select 'Rename Archive' from the Operations menu.

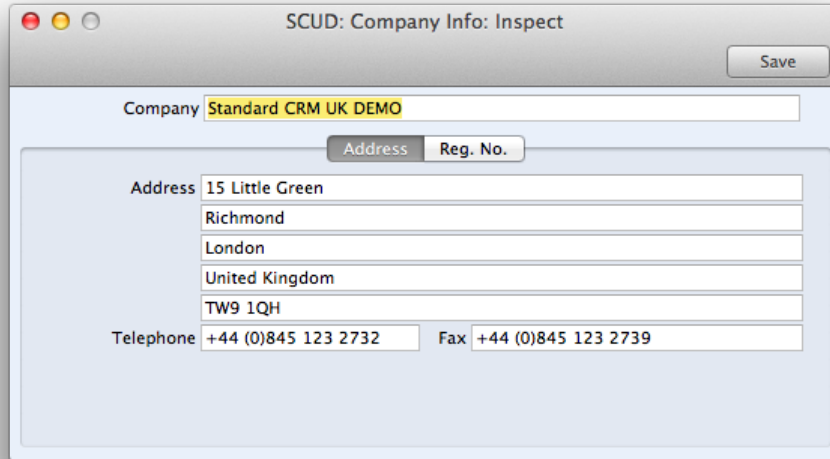
You can remove an item from an Archive in one of two ways. First, you can drag it to the Personal Desktop or to another Archive. Otherwise, to remove the item altogether, click on it and select 'Clear' from the Edit menu.

To remove an Archive, click on it in the Personal Desktop and select 'Clear' from the Edit menu. You can only remove empty Archives. To empty an Archive, you must remove its contents item by item as described above.

INITIAL SETUP

Company Info

Enter your company address and other information as appropriate:

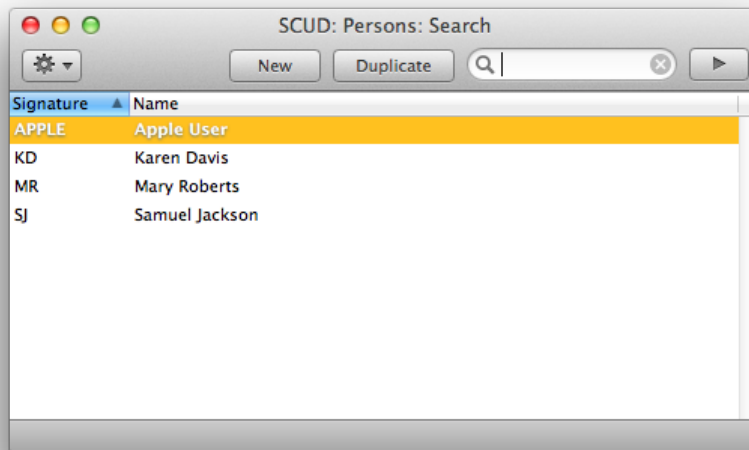


Click the button marked "Reg.No." towards the top centre of the window to see the other important fields in this setting. Here you can enter your company registration number and VAT Number.

Save the details in the Company Info setting by clicking the [Save] button in the top right-hand corner of the window. The window will be closed.

Persons

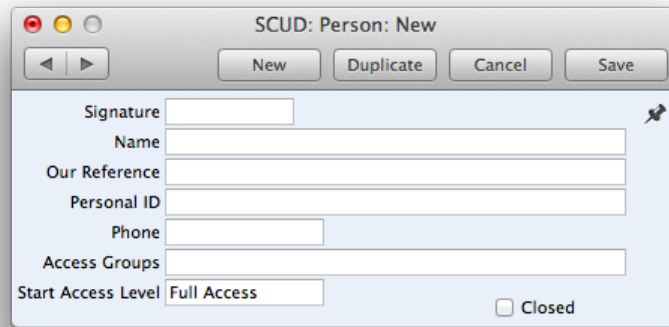
This setting holds information about Persons, i.e. Employees.



Signature	Name
APPLE	Apple User
KD	Karen Davis
MR	Mary Roberts
SJ	Samuel Jackson

To enter a new record, click [New] in the Button Bar or use the ⌘-N keyboard shortcut. Alternatively, highlight a Person similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Person: New' window is opened, empty if you clicked [New], or containing a duplicate of the highlighted Person.



SCUD: Person: New

Buttons: New, Duplicate, Cancel, Save

Signature:

Name:

Our Reference:

Personal ID:

Phone:

Access Groups:

Start Access Level: Full Access

Closed

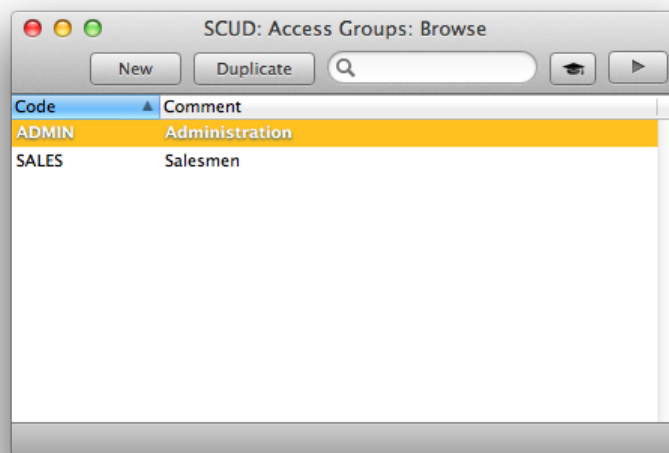
Enter the Person's initials to be used when logging on, or to identify the Person from elsewhere in the system. Type the person's name, phone number and choose Access Group with 'Paste Special'.

Personal ID: In countries where personal identity cards are carried, enter the Person's ID number from their card here.

Access Groups

Access Groups are a part of HansaWorld's security system. You can define a number of Access Groups, each of which can be allowed access to one or more parts of the program. Each member of personnel, when entered to the Persons register, can then be allocated to the relevant Access Group.

Double-click on 'Access Groups' in the 'Settings' list to open the 'Access Groups: Browse' window. A list of the defined Groups is shown:



SCUD: Access Groups: Browse

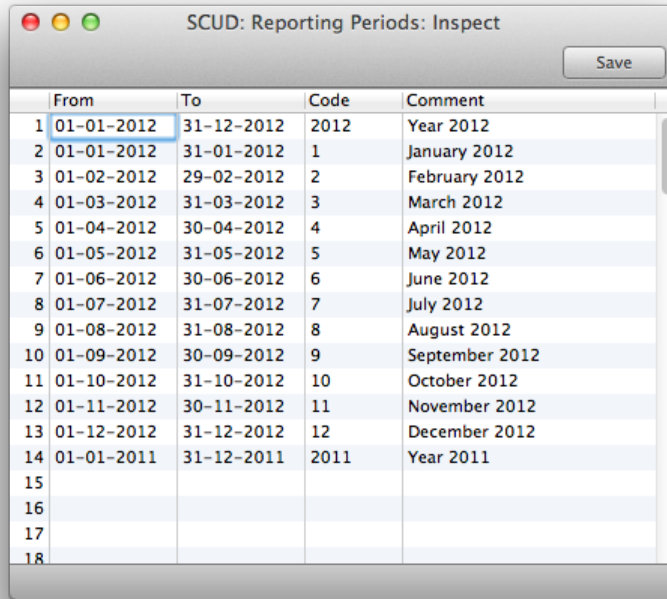
Buttons: New, Duplicate, Search, Home, Play

Code	Comment
ADMIN	Administration
SALES	Salesmen

To create a new Access Group, click [New] in the Button Bar. To edit an existing record, double-click one of the items in the list.

Reporting Periods

This setting allows you to name and define certain time periods. These should be the periods that you will commonly use when producing reports: using 'Paste Special' from the Period field of a report specification window will bring up a list of the Reporting Periods entered using this setting. For example, if you want to produce monthly reports you should define each month in the setting.



The screenshot shows a window titled "SCUD: Reporting Periods: Inspect" with a "Save" button in the top right corner. The window contains a table with the following data:

	From	To	Code	Comment
1	01-01-2012	31-12-2012	2012	Year 2012
2	01-01-2012	31-01-2012	1	January 2012
3	01-02-2012	29-02-2012	2	February 2012
4	01-03-2012	31-03-2012	3	March 2012
5	01-04-2012	30-04-2012	4	April 2012
6	01-05-2012	31-05-2012	5	May 2012
7	01-06-2012	30-06-2012	6	June 2012
8	01-07-2012	31-07-2012	7	July 2012
9	01-08-2012	31-08-2012	8	August 2012
10	01-09-2012	30-09-2012	9	September 2012
11	01-10-2012	31-10-2012	10	October 2012
12	01-11-2012	30-11-2012	11	November 2012
13	01-12-2012	31-12-2012	12	December 2012
14	01-01-2011	31-12-2011	2011	Year 2011
15				
16				
17				
18				

Once memorised, the Code can be used as a fast way of choosing a Reporting Period.

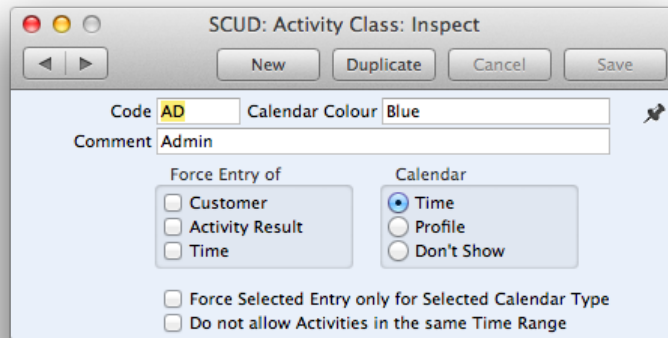
To enter a new Reporting Period, simply click in the first blank line and enter details as appropriate. Click [Save] to save and close, or the close box to close without saving changes.

Note that the Reporting Period in the first row of this setting will be offered as the default wherever a Reporting Period is required. You might therefore like to change the first row from time to time so that a useful option is always offered as a default.

OTHER SETTINGS

Activity Classes

Activity Classes are broad classifications of the various tasks recorded in the Activity register. Examples include: Sales, Marketing, Administration.



Calendar Colour: All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. Choose that colour using this field.

Force Entry of: Check one or more of these boxes if you would like it to be compulsory for a Customer, Result, Cost (Time) and/or Service Order to be entered to all Activities with Activity Types belonging to this Activity Class.

Calendar: These options are used to control how the Activities with Activity Types belonging to this Activity Class are shown in the Calendar. Please refer to the section below describing the 'Task Type' card of the Activity screen for details of each option.

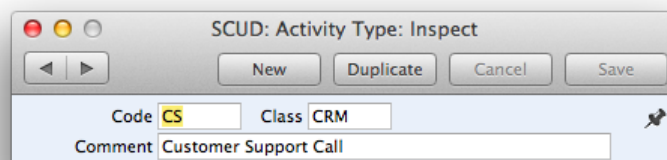
Force Selected Entry only for Selected Calendar Type: This option works with Force Entry and Calendar Type above. It disables the Force Entry options if you change the Calendar Type in an Activity.

Do not allow Activities in the same Time Range: Use this option if you want to prevent double-booking in the Calendar. You must also use the Force Entry of Time option above.

Activity Types

Activity Types are used to classify Activities. Each Activity Type should represent a specific job or task. All Activities recording the same task should be given the same Activity Type. The Activity Type can be used as a search criterion in many of the reports.

The number of Activity Types should be kept small, and great care should be taken to make them mutually exclusive. Activity Types of a broadly similar nature can be grouped together by assigning each one to the same Activity Class.



Code: Specify the code for the Activity Type.

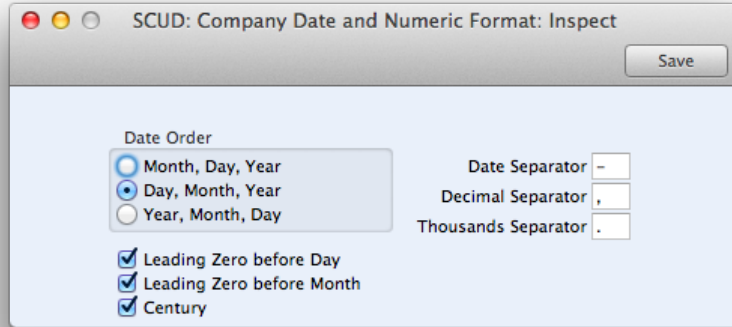
Class: All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar.

Comment: Assign a descriptive name to the Activity Type. This is shown in the 'Activity Types: Browse'

window and the 'Paste Special' list: so you should choose a name that will make the selection of the correct Activity Type easy for all users.

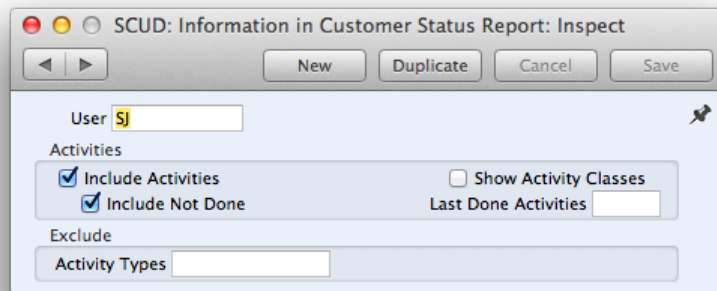
Company Date and Numeric format

Use this setting to ensure your Standard CRM installation uses your preferred date and number formats.



Info in Customer Status Report

The 'Info in Customer Status Report' setting is used to control the appearance of the Customer Status Report when called from the Operations menu function of the 'Contacts: Browse' and 'Contact: Inspect' windows. This setting can be set up for each individual user to show information related to his/her role in the company.



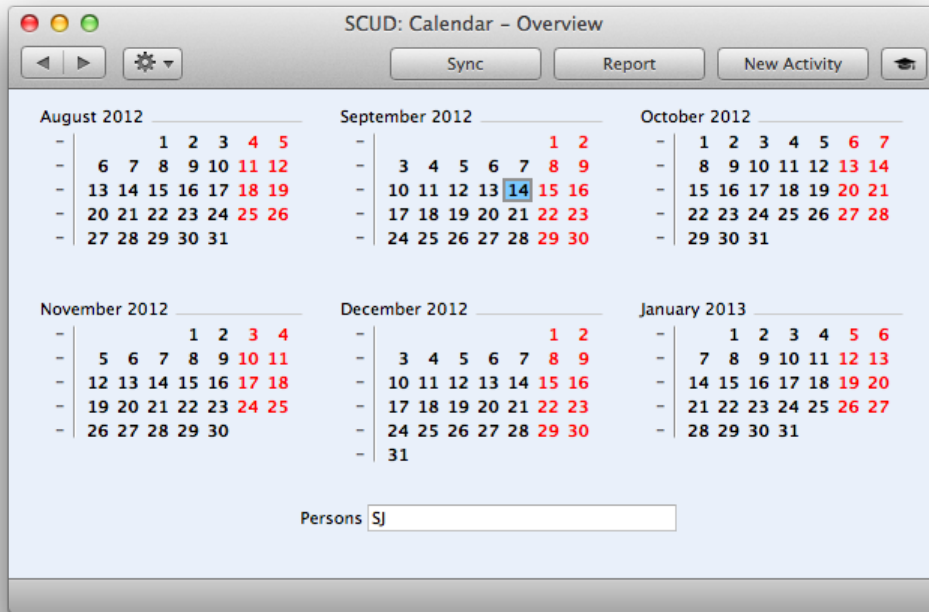
Check those types of information that you want to see on the Customer Status Report. Specify how many entries you want to see of that type or leave blank to see all.

When selecting 'Show Activity Classes', a summary of used Activity Classes will be shown instead of the individual activities (even if you have checked 'Include Activities').

YOUR CALENDAR AND TASK MANAGER

Overview of Calendar

Click on the Calendar icon in the Master Control Panel to open your Calendar. The calendar will be opened using a standard six-monthly format.

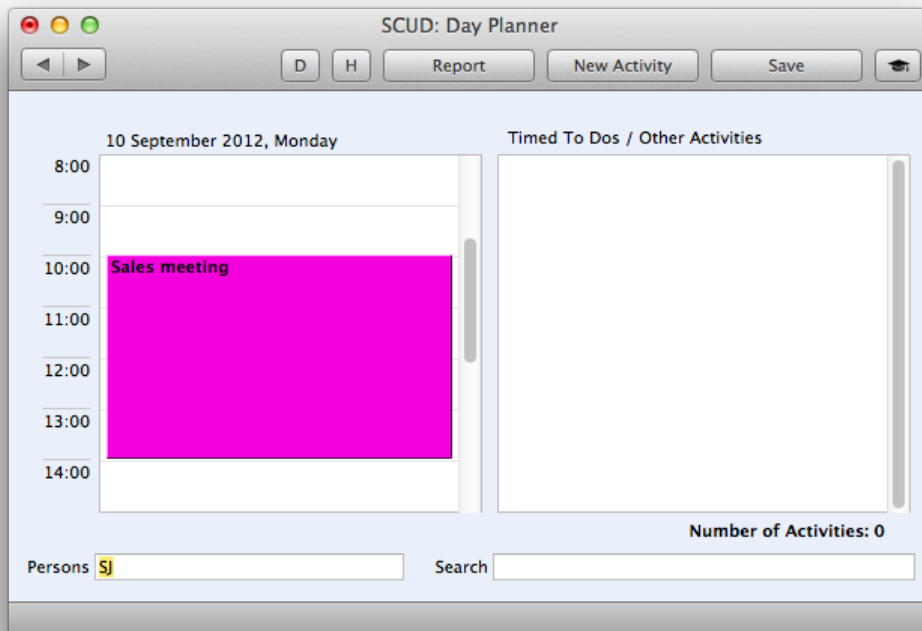


This is only one of four ways of viewing the Calendar. If you wish to see one month only, use the operations menu or just double-click any month name. Here you can see both your activities scheduled for the month and those already carried out during the month so far. As we mentioned in the previous topic, you can predefine different colours for each activity class. This makes it easy to understand the different kinds of activities that you can see in the calendar. For example, in the calendar we are showing below, all sales related work is coloured purple.

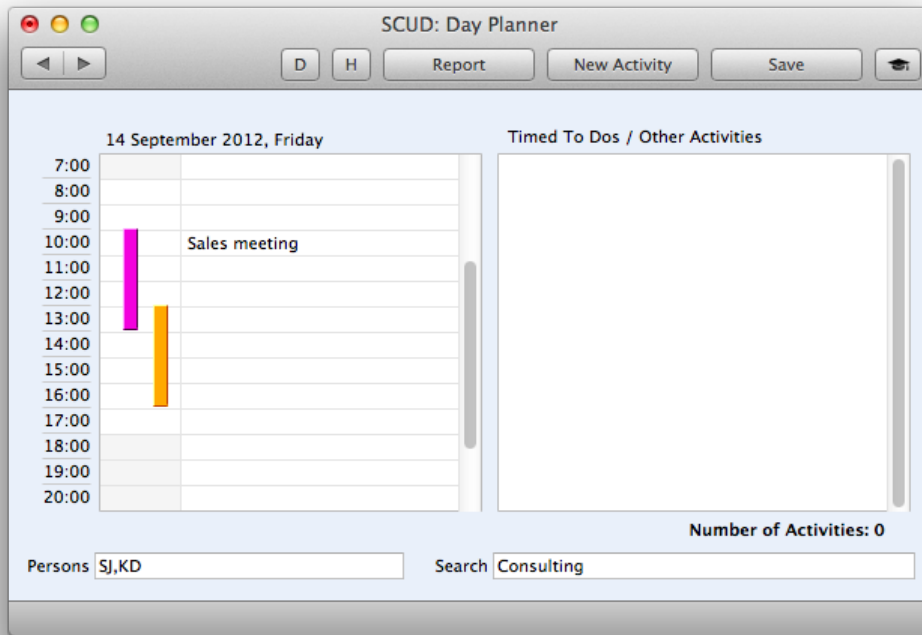


To move between months you can use the "next" and "previous" buttons.

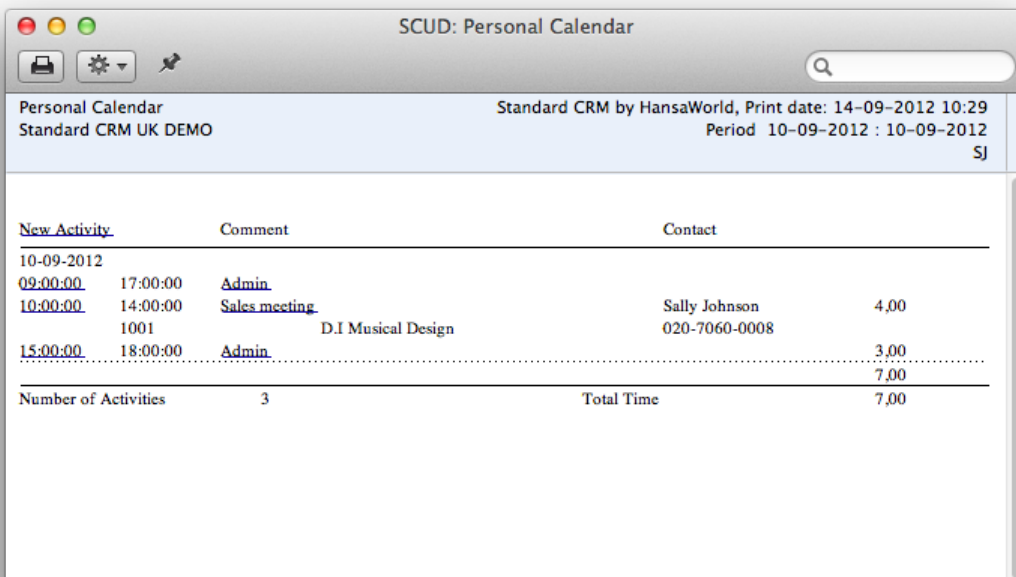
To open a weekly view, double-click any week number, and to see the calendar entries for a particular day you can of course double-click any day number. From there, you can even open an hourly view, by clicking the small H button.



Our Calendar also gives you the option to see the activities of several employees at the same time. To do this, just place a comma after the first person's code, and enter the next person, either by typing their signature, or using paste special.



This allows you, for example, to very quickly check which of your consultants is not yet booked for a particular day. All calendar views offer you the Report Button, which gives you a printable list of the tasks in the calendar view you are looking at, with time statistics.

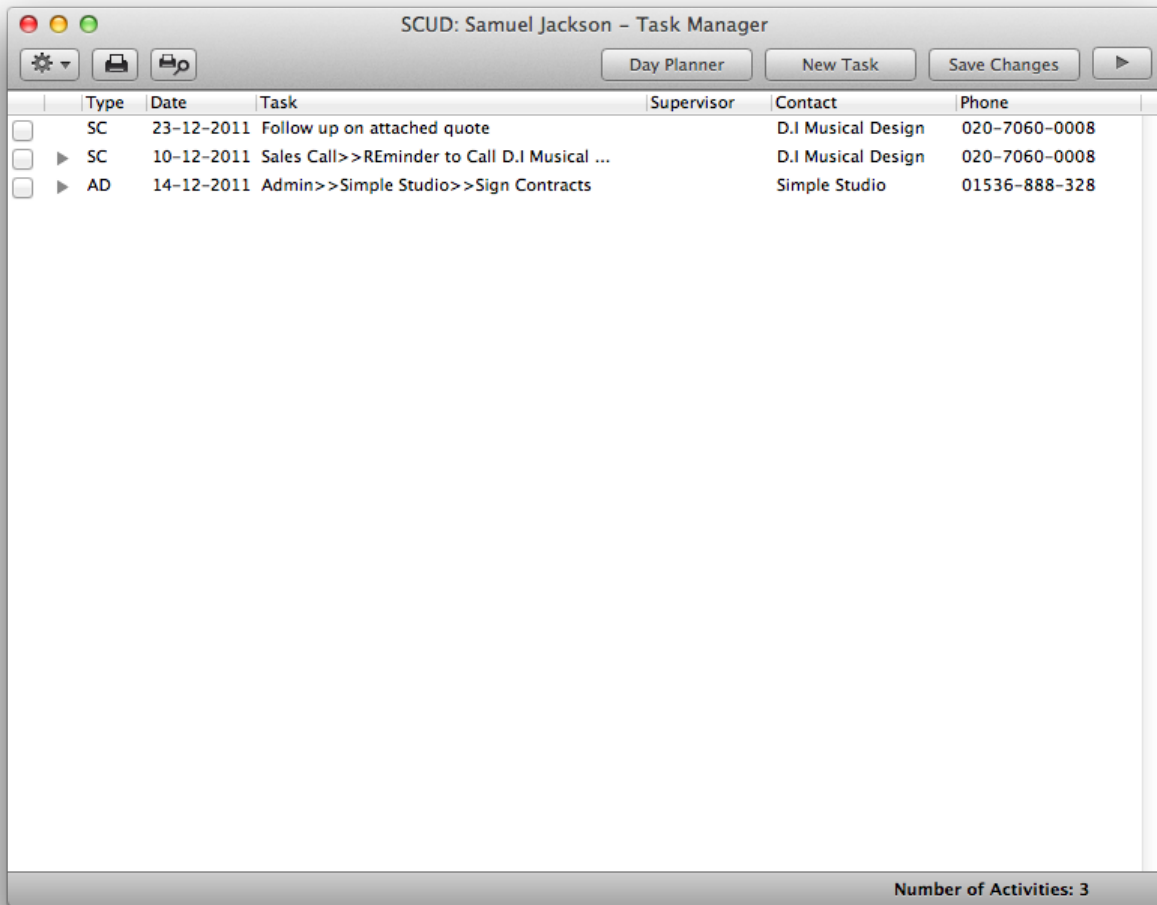


<u>New Activity</u>	Comment	Contact	
10-09-2012			
09:00:00	17:00:00	<u>Admin</u>	
10:00:00	14:00:00	<u>Sales meeting</u>	
	1001	D.I Musical Design	Sally Johnson 4,00
		020-7060-0008	
15:00:00	18:00:00	<u>Admin</u>	3,00
			7,00
Number of Activities	3	Total Time	7,00

As with many reports, this report has our HansaWorld drill-down functionality. When you print the report to screen, this allows you to open every activity to see more details, such as extra text that has been added, or attachments.

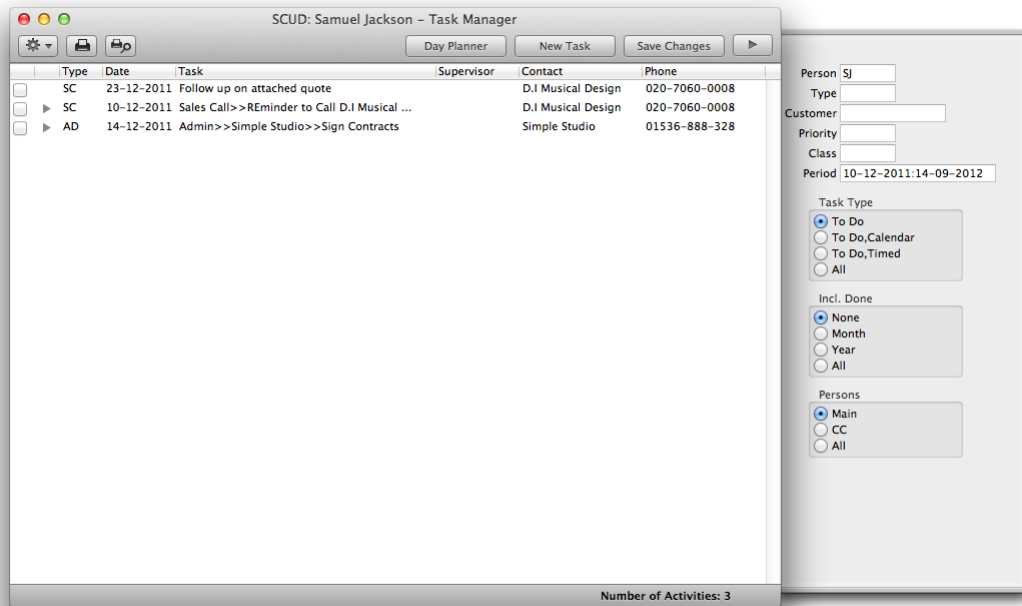
Overview of the Task Manager

Open your Task Manager by clicking Tasks icon on your master control panel.



Here you will see a list of To Do activities where the start date is the current date or earlier and where the done checkbox is not checked.

You can filter your task list by selecting a customer or by entering an activity class in the drawer of your task list. You can open the drawer by clicking the arrow button on the right top corner of the browse window.



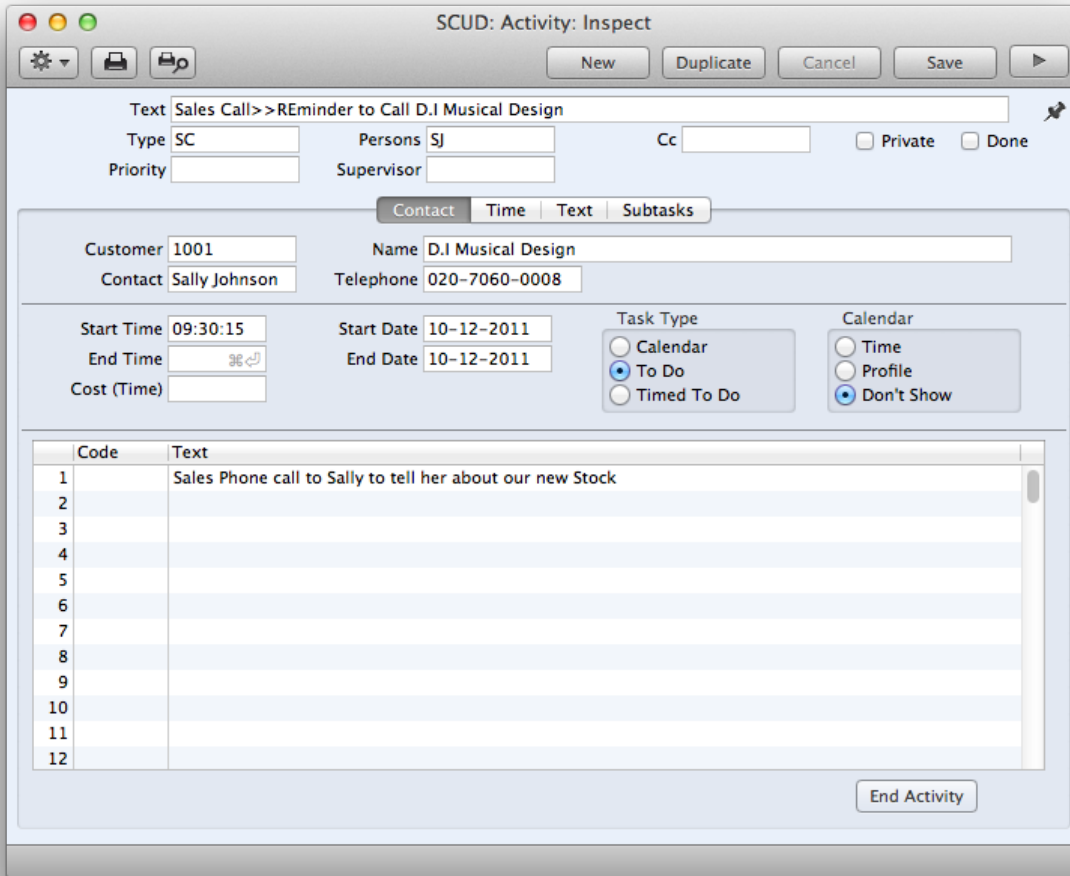
Only tasks in the specified period will be displayed.

You can further filter the list by using the radio buttons on the drawer. Select Task Type, for example, To Do or Timed To Do. By default only To Do activities will be shown in the task manager. Calendar activities will only appear in the calendar. Timed to do activities will be displayed on the right hand side of the calendar view. Select Persons, for example, to only see activities from other person.

To view the details of a specific task in your list you can double click on it and the activity record will open. When a task has been completed you can tick the Done checkbox. The activity will then be removed from your task list.

ENTERING ACTIVITIES

All business events, appointments and tasks can be recorded as Activities. Through the careful use of Activity Types and Classes, the Activity register can become a valuable source of information, recording many different types of customer and other business related operations. Both past and future events can be recorded, so the register can be used as an efficient diary management tool.

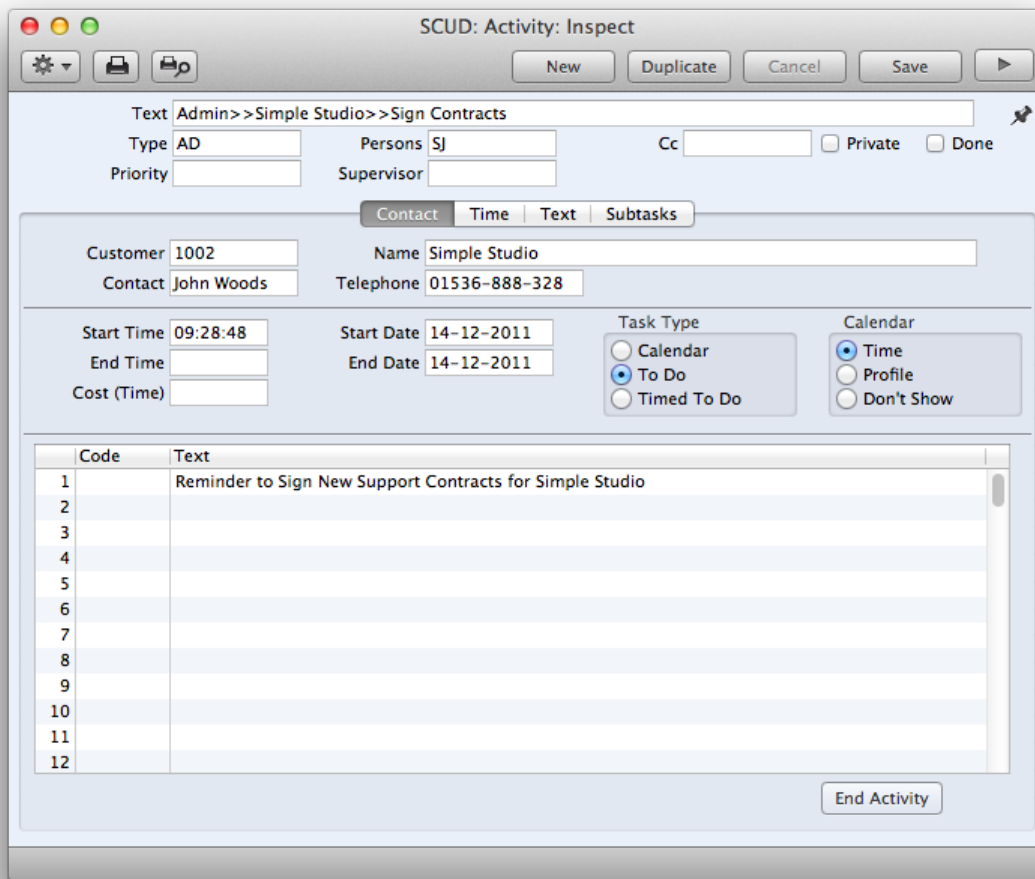


The screenshot shows the 'SCUD: Activity: Inspect' window. At the top, there are buttons for 'New', 'Duplicate', 'Cancel', 'Save', and a play button. Below these are input fields for 'Text' (Sales Call->REminder to Call D.I Musical Design), 'Type' (SC), 'Persons' (SJ), 'Cc', 'Priority', and 'Supervisor'. There are also checkboxes for 'Private' and 'Done'. Below this is a tabbed interface with 'Contact', 'Time', 'Text', and 'Subtasks' tabs. The 'Contact' tab is active, showing fields for 'Customer' (1001), 'Name' (D.I Musical Design), 'Contact' (Sally Johnson), and 'Telephone' (020-7060-0008). Below this are fields for 'Start Time' (09:30:15), 'End Time', 'Cost (Time)', 'Start Date' (10-12-2011), and 'End Date' (10-12-2011). There are also radio buttons for 'Task Type' (Calendar, To Do, Timed To Do) and 'Calendar' (Time, Profile, Don't Show). At the bottom, there is a table with columns 'Code' and 'Text'. The table has 12 rows, with the first row containing '1' and 'Sales Phone call to Sally to tell her about our new Stock'. An 'End Activity' button is located at the bottom right of the window.

Activities can be entered in many ways. Here are some examples:

1. Having printed the Personal Calendar report to screen, click the text "New Activity" at the top of the report.
2. Click the "New Activity" button in the Calendar overview window and the activity will be automatically created for the current day.
3. From the Task Manager window, click the 'New Task' button.
4. Activities can also be created from Customer records using the 'Create Activity' Operations menu function. In these cases, the new Activity will not be given a default Activity Type.
5. The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record.
6. From the Contacts browse windows, you can highlight customer record and select 'Create Activity' from the Operations menu. On selecting the function, the new Activity is created and saved, and also automatically opened for checking or modification.

To enter a new activity, click the "New Activity" button in the Calendar overview window and the activity will be automatically created for the current day. Alternatively, open the calendar for the day that you need and then create a new activity in the same way.



Header

Text: Use this free text field to describe the Activity.

Type: Enter an Activity Type to classify the Activity. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting).

Persons: The Person doing the Activity. The Signature of the current user is entered as a default.

If the Activity is to be carried out by more than one Person, enter all appropriate Signatures, separated by commas.

CC: Enter the Signature of anyone else that needs to know about the Activity (e.g. the person responsible for the Customer).

Priority: You can grade the importance of each Activity using the Priority field. In the case of To Do Activities, the Priority will be shown in the Task Manager: you can reduce the list in the Task Manager so that it only shows Activities with a particular Priority.

Supervisor: Enter the Signature of the Person ultimately responsible for the Activity here. The Activity will not appear in their Calendar, Personal Calendar report or Task Manager.

Private: Activities marked as Private and with your Signature will appear in your Personal Calendar and Activities, Contacts reports, in any Calendar view and in Task Manager when viewed by you, but not when viewed by any other user. They will also be excluded from most other reports when produced by other users.

Done: Use this check box to mark the Activity as done or finished. You should enter planned or scheduled Activities without checking the Done box. As you complete these Activities, check the Done box and perhaps enter some notes in the grid area on the 'Text' card. In this way, you can easily maintain a 'To Do' list. By default, To Do Activities that have been marked as Done will not be shown in the Task Manager.

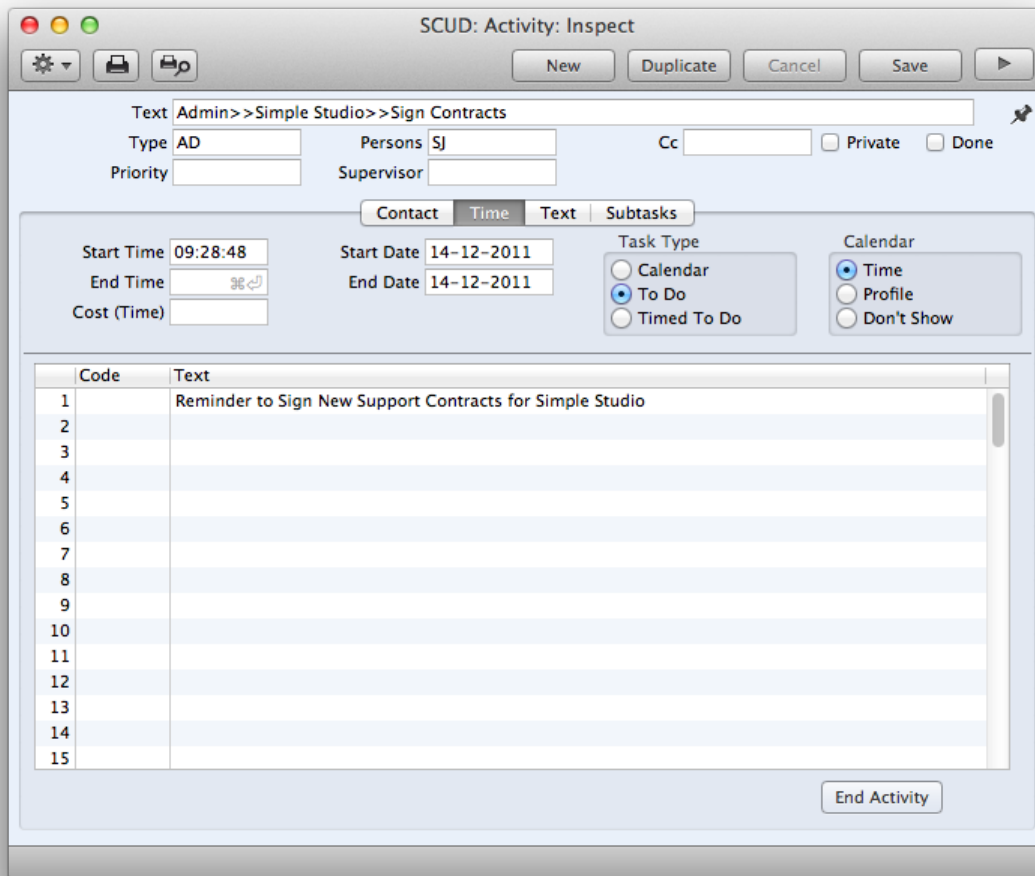
Once you have marked an Activity as Done and saved it, you will not be able to change many fields

such as the Start and End Dates and Times and the Person.

Contact card

Customer: Enter a Contact Number or use the 'Paste Special' function. When you press Return, the Customer's name, Primary Contact and Telephone Number will be entered into the fields below.

Time card



The screenshot shows a window titled "SCUD: Activity: Inspect". At the top, there are buttons for "New", "Duplicate", "Cancel", "Save", and a play button. Below these are several input fields: "Text" (Admin>>Simple Studio>>Sign Contracts), "Type" (AD), "Persons" (SJ), "Cc" (empty), "Priority" (empty), "Supervisor" (empty), "Private" (checkbox), and "Done" (checkbox). There are tabs for "Contact", "Time", "Text", and "Subtasks". Under the "Time" tab, there are fields for "Start Time" (09:28:48), "End Time" (with a refresh icon), "Cost (Time)" (empty), "Start Date" (14-12-2011), and "End Date" (14-12-2011). To the right of these are "Task Type" options: "Calendar", "To Do" (selected), and "Timed To Do". Further right are "Calendar" options: "Time" (selected), "Profile", and "Don't Show". At the bottom, there is a table with columns "Code" and "Text".

Code	Text
1	Reminder to Sign New Support Contracts for Simple Studio
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	

An "End Activity" button is located at the bottom right of the window.

Start Time, Start Date: The time and date when work on the Activity is to be, or was, started.

End Time, End Date: The time and date when work on the Activity is to be, or was, finished.

Cost(Time): The overall time required to complete the Activity, calculated by Standard CRM from the Start and End Times and Dates. If this is not a true figure (perhaps there was a break for lunch, for example), you can overwrite it with the correct figure.

Task Type: Use these options to specify the main purpose of the Activity:

- **Calendar:** Choose this option if the Activity is to appear in the Calendar.
- **To Do:** Check this box if you would like this Activity to be shown in the Task Manager. Usually this will be because the purpose of the Activity is to schedule a single task, such as a telephone call.
- **Timed To Do:** Choose this option if the Activity is to appear in the right-hand panel of the Day Planner.

In all cases, if the Calendar option to the right is Time or Profile, the Activity must have both Start and End Times before it can be saved. The Calendar option has no other effect if the Task Type is To Do or Timed To Do.

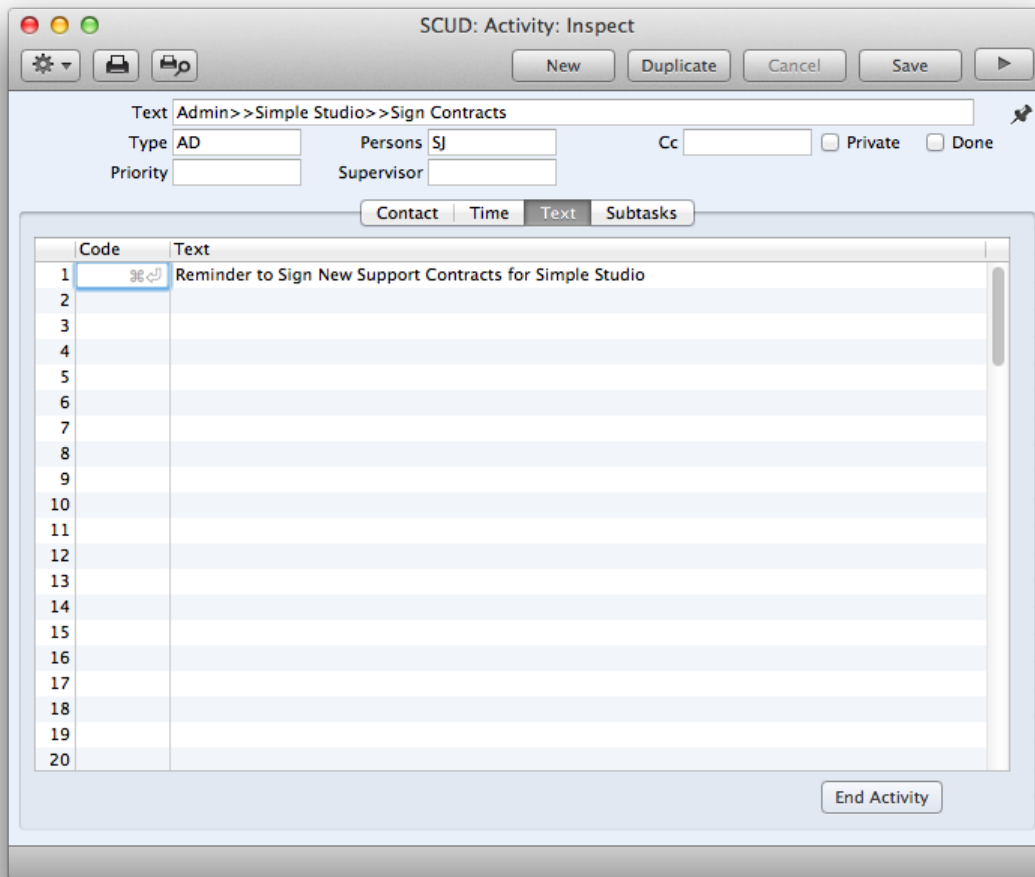
Calendar: These options are used to control how the Activity is shown in the Calendar. These options can even be changed after the Activity has been marked as Done and saved. Usually these options apply only to Activities whose Task Type (above) is Calendar. These options can be changed once the Activity has been marked as Done and saved.

- **Time:** This option should be chosen in an Activity that represents actual time spent in carrying out a task.
- **Profile:** This option can be used to book future time in the Calendar.
- **Don't Show:** Use this option if you don't want the Activity to be shown in the Calendar. It will still appear in the Personal Calendar report.

It can be difficult to return to a Don't Show Activity after it has been saved, because it does not appear in the Calendar. You can drill down to it from the Personal Calendar report, or you can use the 'Filter' card of the Task Manager. Choosing the correct Task Type option here will cause all Calendar Activities to be listed, even those marked as Don't Show.

If an Activity Type that belongs to an Activity Class is specified, the chosen Calendar option will change to that set in the Activity Class. You can choose another Calendar option in a particular Activity, but take care to note that another option may be selected if you then change the Activity Type.

Text card



SCUD: Activity: Inspect

Text: Admin>>Simple Studio>>Sign Contracts

Type: AD Persons: SJ Cc: Private Done

Priority: Supervisor: Done

Buttons: Contact | Time | **Text** | Subtasks

Code	Text
1	Reminder to Sign New Support Contracts for Simple Studio
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

End Activity

Code: The grid area is useful if you need to make notes about the Activity. Use the 'Paste Special' link to the Text Types setting to bring in certain generic comments, or leave the Code field blank and simply type some ad hoc text in the Text field. There is space for several rows of notes.

Text: This field will contain the text for the Text Type. You may add any free text as appropriate. If you need to enter more than one line of text, keep typing. The insertion point will move to the next line

automatically when necessary.

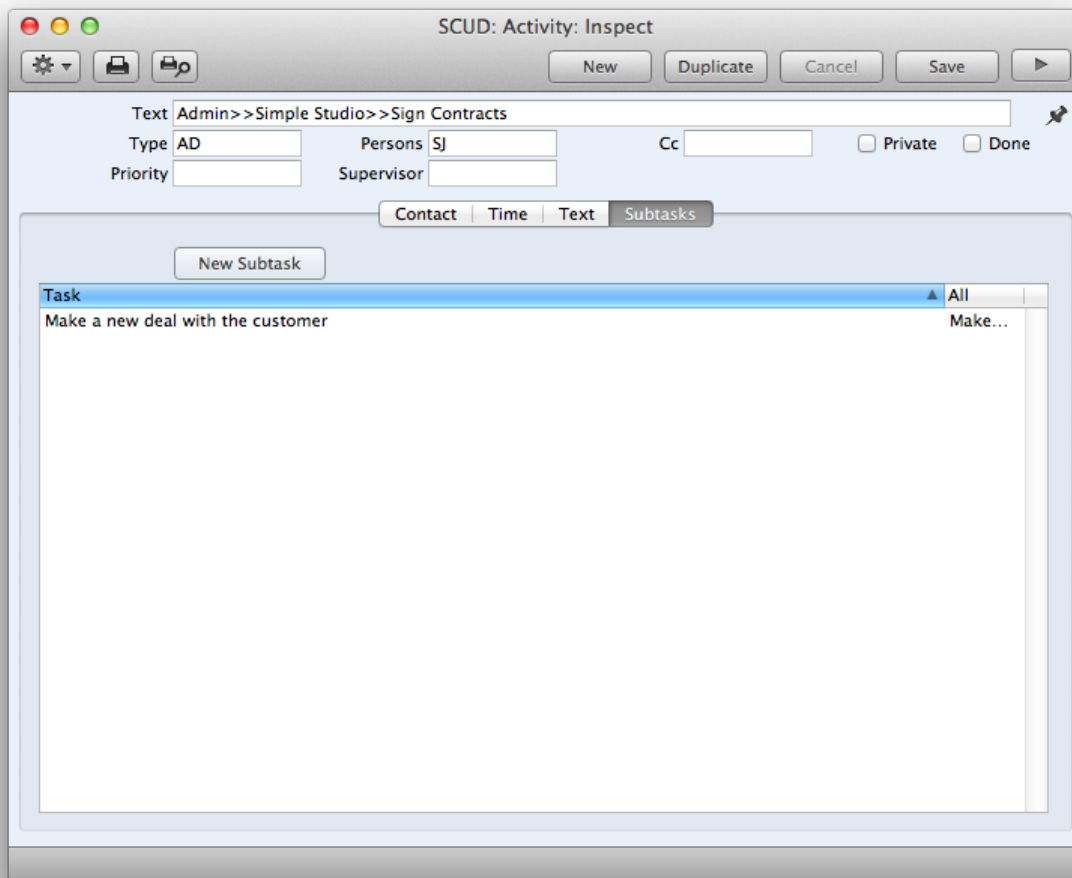
End Activity: This button will bring the current date and time into the End Date and End Time fields, overwriting what was previously there, and save the Activity.

Subtasks

If you press the 'New Subtask' button, under the 'Subtasks' tab, a new activity window record will show with the Person, Start Time and Start Date filled in by default, with your persons initials and actual time and date, the activity will also be set to type 'To Do' and Calendar type 'Don't Show'.

Here you can add sub-activities or subtasks associated to the main activity, and you can add as many of these as you'd like. These subtasks will be shown and listed on the Tasks grid once you've saved them. These will also be shown in the Tasks list.

In the SubTasks grid you will find two columns: the 'Tasks' column and the 'All' column. If you sort by 'Task' then it will only list not done activities that are Subtasks to the main Activity. If you sort by 'All', then both the not done Activity and it's Subtasks will be shown. Once those Subtasks are marked as Done and saved, then they will no longer appear in the grid.

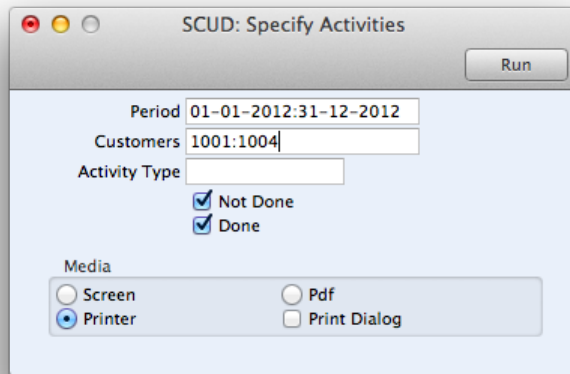


Printing activities

You can use up to three methods to print activities. These are:

1. Open the record that you want to print and click the Printer icon.
If you want to print to screen, click the Preview icon.
2. Open the register containing the record that you want to print, highlight it in the list and select 'Print' from the File menu. You can select a number of records by shift-clicking to print them all.
3. Use the [Documents] button in the Master Control panel or the CMD-D keyboard shortcut to open the list of documents. Double-click the document that you want to print. A dialog box (also known as a "specification window") will open, where you should specify the records that you want to print.

Specify the activity or activities that you want to be printed. If you want to print a range, separate the first and last records in the range using a colon as shown in the illustration.



SCUD: Specify Activities

Run

Period 01-01-2012:31-12-2012

Customers 1001:1004

Activity Type

Not Done

Done

Media

Screen Pdf

Printer Print Dialog

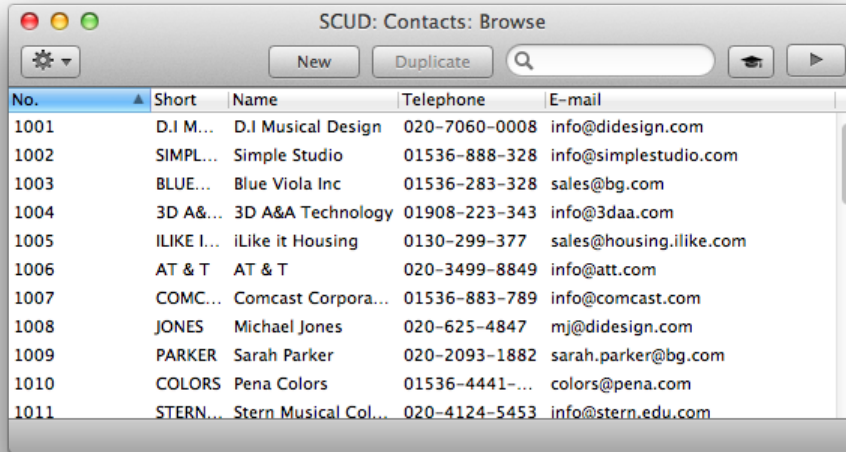
For example, to report on Customers 1001 to 1004, enter "1001:1004" in the Customers field.

Use the Media options to choose the destination of the printout. When printing documents, the only options you can use are Screen, Printer and Pdf, and if your database is in restricted mode, you can only use the Screen option.

Finally, click the [Run] button.

ENTERING A NEW CONTACT

Information about your Customers, Contact Persons and all other companies and individuals with whom you have some contact is stored in the Contact register. As soon as contact is established between your business and a potential client, you should record their details in the Contact register.



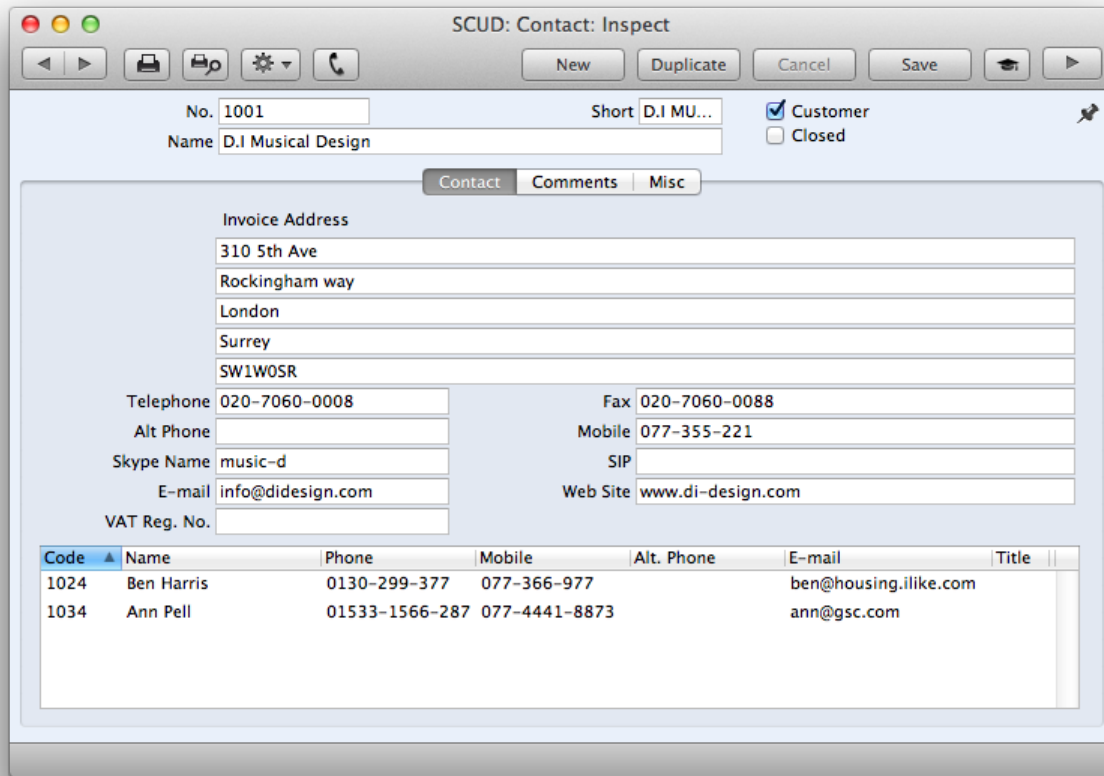
The screenshot shows a window titled "SCUD: Contacts: Browse" with a toolbar containing "New", "Duplicate", and a search field. Below the toolbar is a table with the following data:

No.	Short	Name	Telephone	E-mail
1001	D.I M...	D.I Musical Design	020-7060-0008	info@didesign.com
1002	SIMPL...	Simple Studio	01536-888-328	info@simplestudio.com
1003	BLUE...	Blue Viola Inc	01536-283-328	sales@bg.com
1004	3D A&...	3D A&A Technology	01908-223-343	info@3daa.com
1005	ILIKE I...	iLike it Housing	0130-299-377	sales@housing.ilike.com
1006	AT & T	AT & T	020-3499-8849	info@att.com
1007	COMC...	Comcast Corpora...	01536-883-789	info@comcast.com
1008	JONES	Michael Jones	020-625-4847	mj@didesign.com
1009	PARKER	Sarah Parker	020-2093-1882	sarah.parker@bg.com
1010	COLORS	Pena Colors	01536-4441-...	colors@pena.com
1011	STERN...	Stern Musical Col...	020-4124-5453	info@stern.edu.com

Entering a new Contact record

To enter a new record in the Contacts register, click [New] in the Button Bar or use the ⌘-N keyboard shortcut. Alternatively, highlight a record similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Contact: New' window is shown, empty if you clicked [New] or containing a duplicate of the highlighted record.



The screenshot shows a window titled "SCUD: Contact: Inspect" with a toolbar at the top containing buttons for "New", "Duplicate", "Cancel", "Save", and navigation icons. The main form area has a header with fields for "No." (1001), "Short" (D.I MU...), and checkboxes for "Customer" (checked) and "Closed" (unchecked). Below the header are tabs for "Contact", "Comments", and "Misc". The "Contact" tab is active, showing an "Invoice Address" section with fields for "310 5th Ave", "Rockingham way", "London", "Surrey", and "SW1W0SR". Other fields include "Telephone" (020-7060-0008), "Fax" (020-7060-0088), "Alt Phone", "Mobile" (077-355-221), "Skype Name" (music-d), "SIP", "E-mail" (info@didesign.com), "Web Site" (www.di-design.com), and "VAT Reg. No.". At the bottom, there is a table with columns: Code, Name, Phone, Mobile, Alt. Phone, E-mail, and Title.

Code	Name	Phone	Mobile	Alt. Phone	E-mail	Title
1024	Ben Harris	0130-299-377	077-366-977		ben@housing.ilike.com	
1034	Ann Pell	01533-1566-287	077-4441-8873		ann@gsc.com	

Header and Contact card

By clicking the tabs you can navigate between cards. The header is always visible, as a reminder of the Contact you are working with.

Enter the unique code you are assigning to this Contact. This is the means by which this Contact will be identified elsewhere in the system. The field holds up to 12 letters and/or numbers. A default will be offered, based on the Contact Number of the previous record entered.

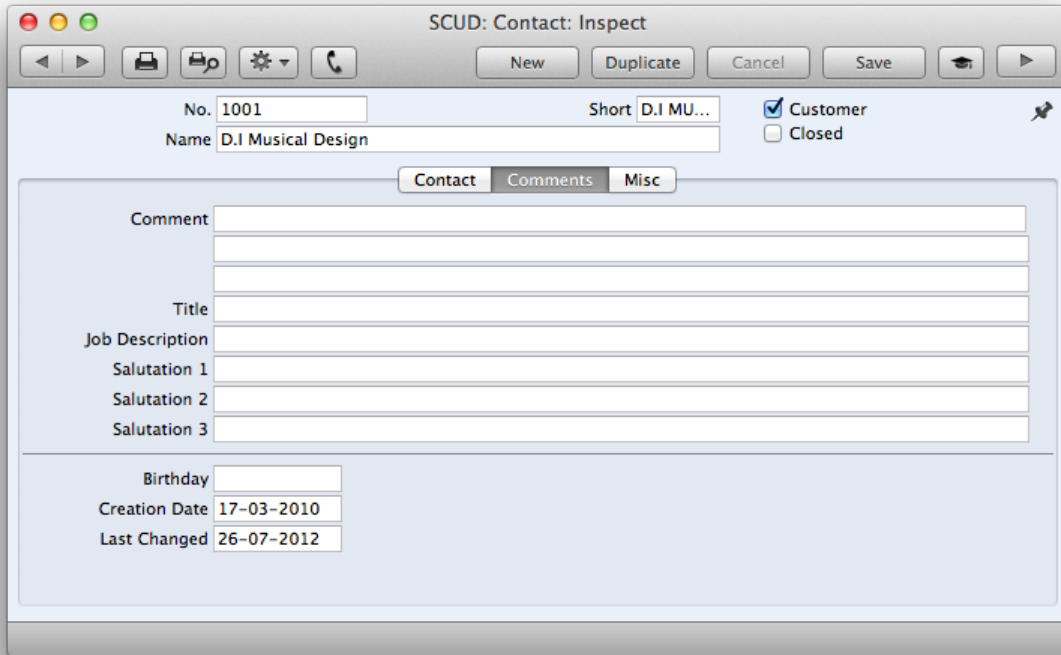
Once you have saved the record, you cannot change the Contact Number!

Mark the record as a Customer using the check box in the header. Leave the box unchecked for all other contacts.

Use the 'Short' field as an alternative means of identifying this Contact - information entered here appears in the Short column in the 'Contacts: Browse' window. Contacts of a similar nature (e.g. same industry) could be given the same Short Code so that they would be grouped together in the 'Contacts: Browse' window when sorted by the Code column.

Enter the Contact's address, main telephone, mobile and fax numbers, email and Skype name as appropriate.

Comments card



The screenshot shows a software window titled "SCUD: Contact: Inspect". At the top, there are navigation buttons (back, forward, print, copy, settings, phone) and action buttons (New, Duplicate, Cancel, Save). The main form contains the following fields:

- No. 1001
- Short D.I MU...
- Name D.I Musical Design
- Customer
- Closed

Below these fields are three tabs: "Contact" (selected), "Comments", and "Misc". The "Contact" tab contains several input fields:

- Comment (a large text area)
- Title
- Job Description
- Salutation 1
- Salutation 2
- Salutation 3

At the bottom of the form, there are three more fields:

- Birthday
- Creation Date 17-03-2010
- Last Changed 26-07-2012

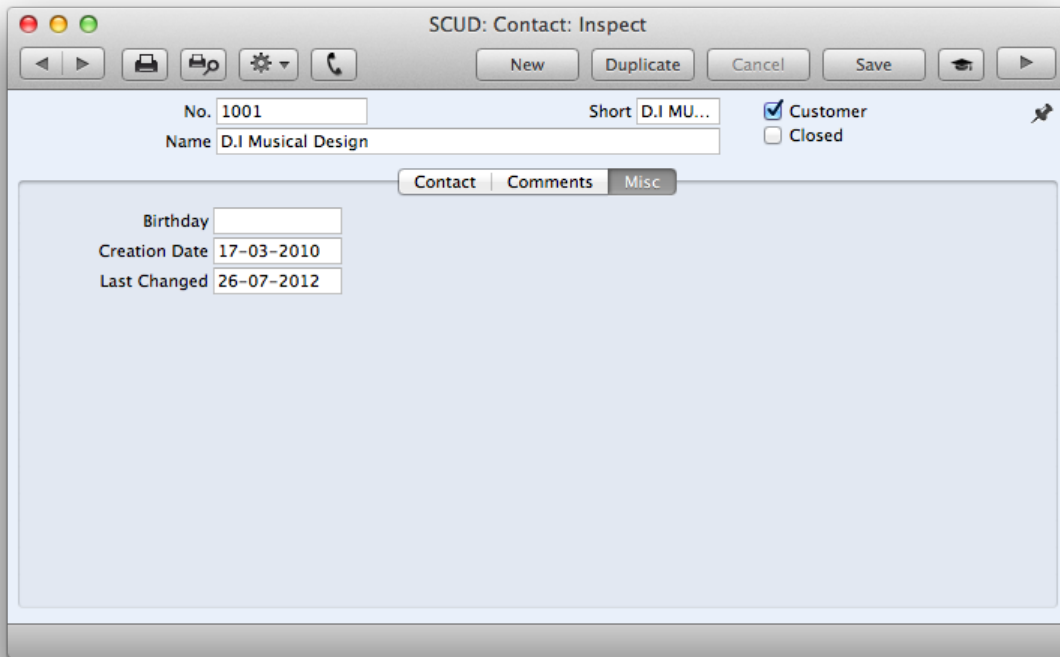
Comment: This field can be used to record any additional information about the Contact.

Title: The Job Title of the Contact, as it appears on their business card.

Job Description: This field is used to describe the role of the Contact within their company.

Salutation 1, 2 and 3: These fields can be used to record greetings with various degrees of formality. It is recommended that you enter Salutations in all three fields, even if they are the same.

Misc card



The screenshot shows a software window titled "SCUD: Contact: Inspect". The window has a standard macOS-style title bar with red, yellow, and green window control buttons. Below the title bar is a toolbar with icons for navigation and actions, and buttons for "New", "Duplicate", "Cancel", "Save", and a play button. The main content area is divided into sections. At the top, there are input fields for "No." (containing "1001") and "Short" (containing "D.I MU..."). To the right of these fields are two checkboxes: "Customer" (checked) and "Closed" (unchecked). Below this is a "Name" field containing "D.I Musical Design". A tabbed interface below the name has three tabs: "Contact" (selected), "Comments", and "Misc". Under the "Contact" tab, there are three rows of data: "Birthday" with an empty input field, "Creation Date" with the value "17-03-2010", and "Last Changed" with the value "26-07-2012".

Birthday: Enter the Contact's birthday here. This information will be used by the Birthday List report.

Creation Date: This field automatically records when this Contact record was added to your Standard CRM database and cannot be changed.

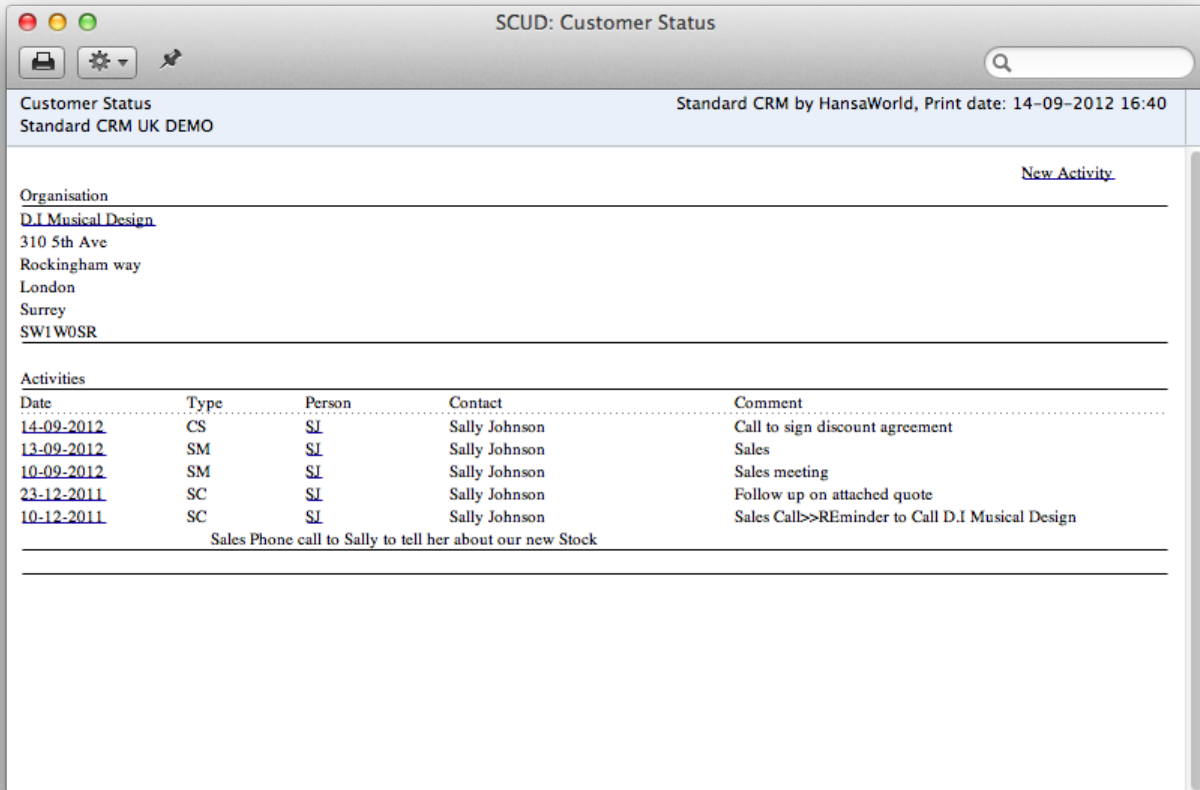
Last Changed: This Date is updated automatically whenever you make a modification to the Contact record on screen.

WORKING WITH EXISTING CONTACTS

Checking a contact's status

Open Contact record and choose 'Customer Status' function from the Operations menu. Alternatively, you can open Contacts browse window, highlight customer record and select 'Customer Status' from the Operations menu.

It prints a Customer Status report to screen.



Customer Status				
Standard CRM by HansaWorld, Print date: 14-09-2012 16:40				
Standard CRM UK DEMO				
Organisation				New Activity
D.I Musical Design				
310 5th Ave				
Rockingham way				
London				
Surrey				
SW1W0SR				
Activities				
Date	Type	Person	Contact	Comment
14-09-2012	CS	SJ	Sally Johnson	Call to sign discount agreement
13-09-2012	SM	SJ	Sally Johnson	Sales
10-09-2012	SM	SJ	Sally Johnson	Sales meeting
23-12-2011	SC	SJ	Sally Johnson	Follow up on attached quote
10-12-2011	SC	SJ	Sally Johnson	Sales Call>>REminder to Call D.I Musical Design
Sales Phone call to Sally to tell her about our new Stock				

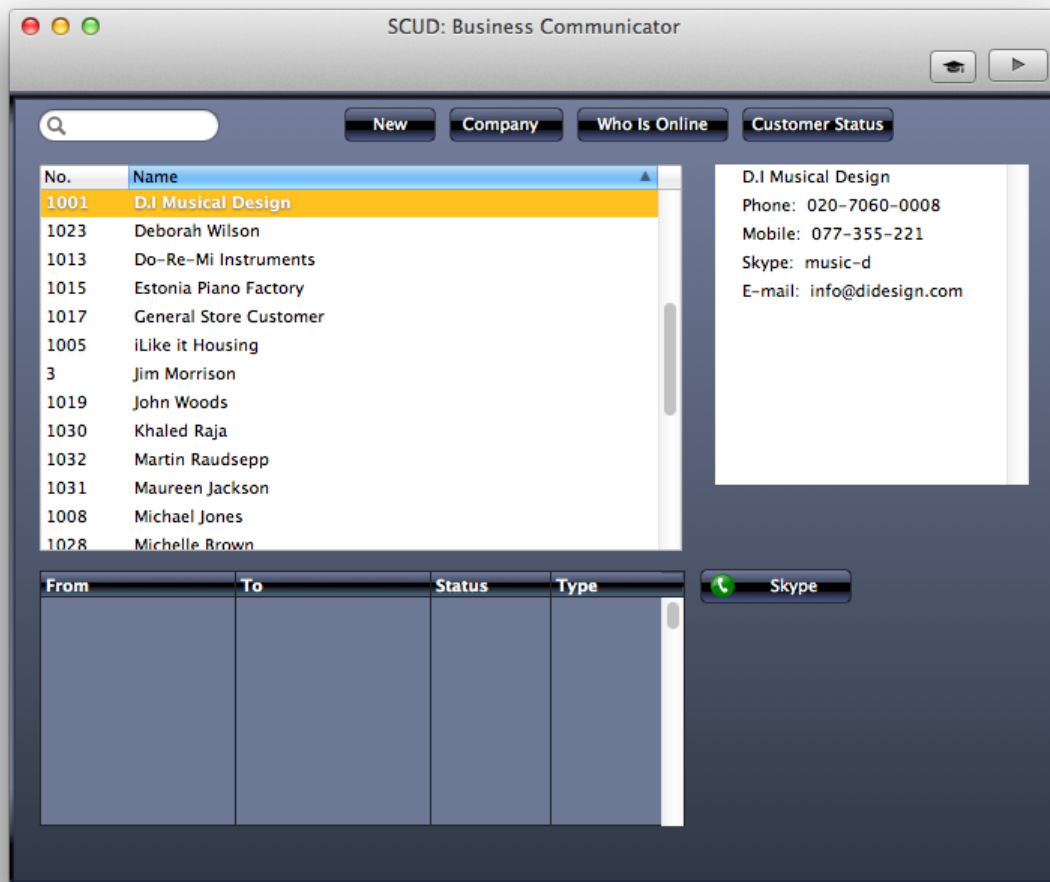
In its basic form, this report shows address and activities information and lists all Contact Persons for the Customer currently on screen or for those Customers highlighted in the browse window. However, if required, more information can be shown in the report. The 'Info on Customer Status Report' setting can be used to control how much additional information will be shown to different users.

With the drill-down functionality you can easily access the underlying records, which makes you much more effective in your decision making and customer service. You can easily go back and make some changes on the contact card. You can generate an activity to the customer and after that regenerate the customer status report once more. With the operations menu, select the option recalculate. Now you should be able to see the update on the customer status report.

Communicating with your Contacts

You can communicate with your customers through Standard CRM Business Communicator.

Open Contact record and click the Business Communicator button. Following window is opened:



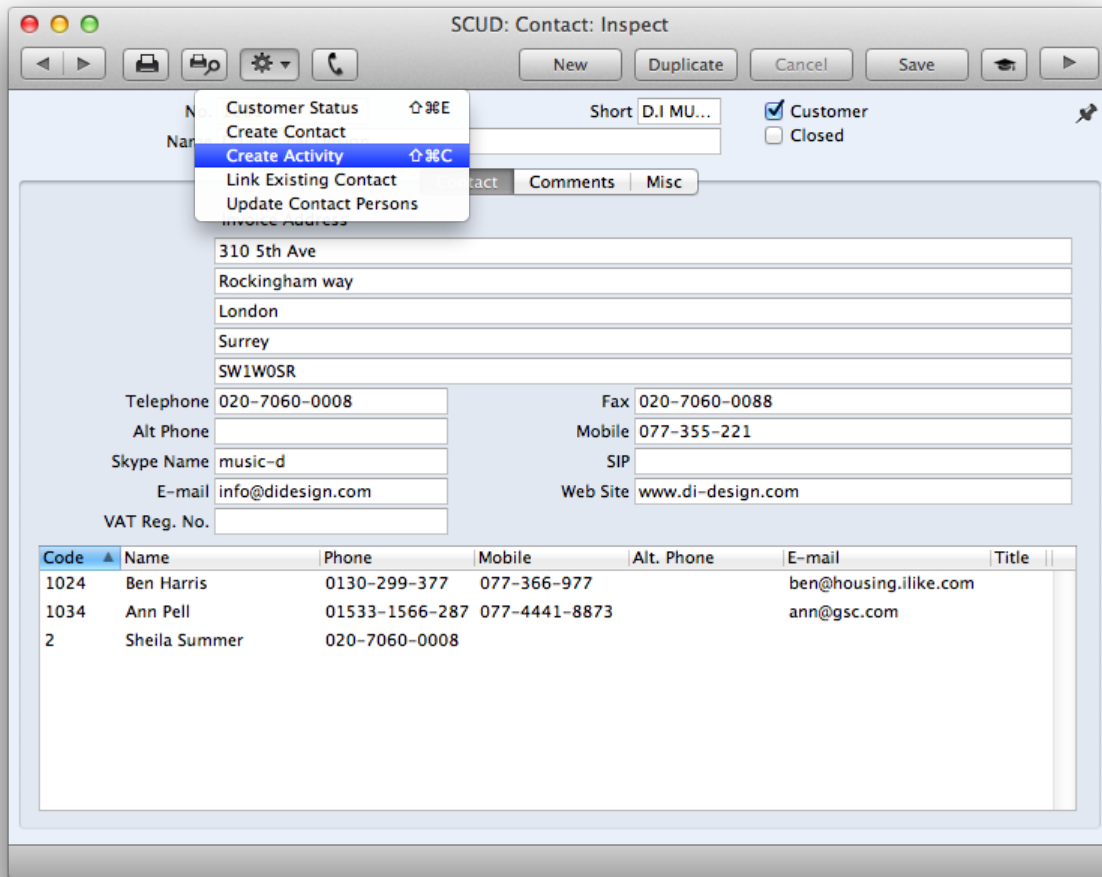
Search: Search in the Contact register.

New: Create new customer or contact person.

Who is Online: Look for who is logged in into Standard CRM.

Registering Activities with your Contacts

Open Contact record and choose 'Create Activity' function from the Operations menu. Alternatively, you can open Contacts browse window, highlight the customer record and select 'Create Activity' from the Operations menu.

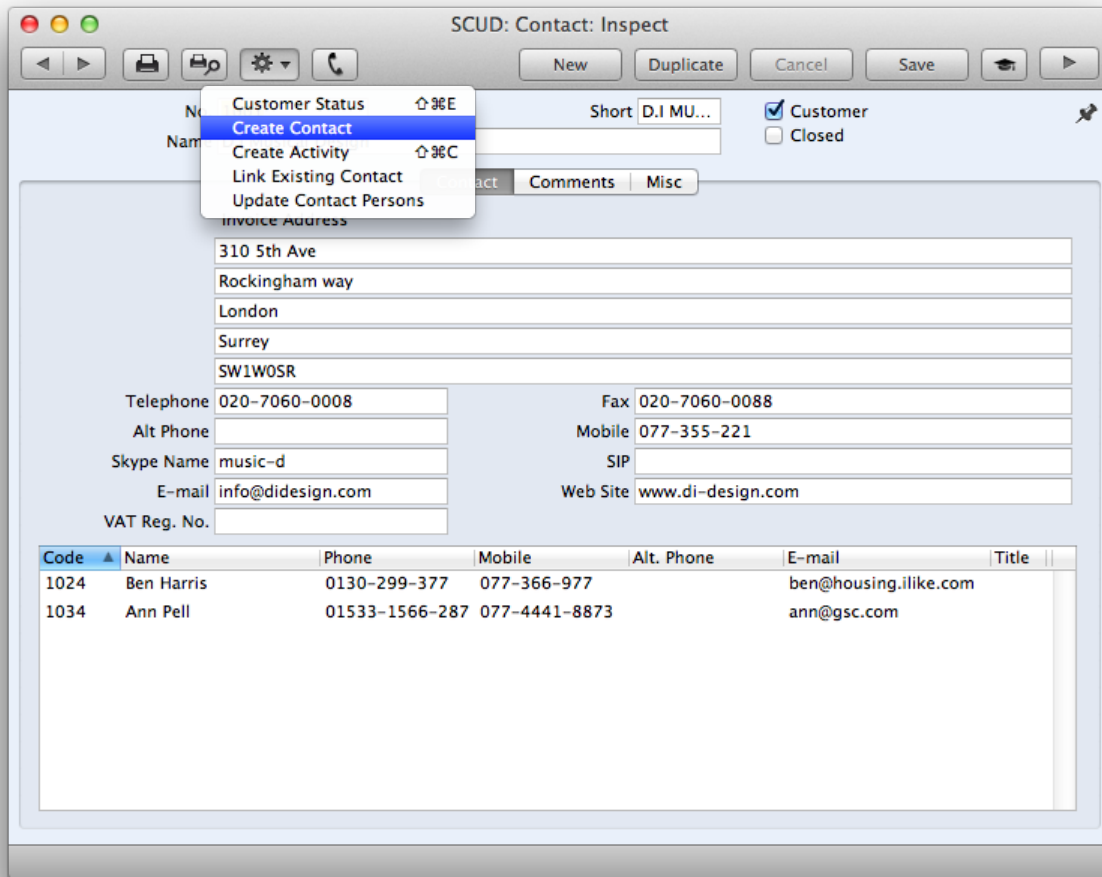


This function can be used to create records in the Activities register. The new record is opened in a window entitled 'Activity: Inspect'. This means that it has already been saved and is being opened for checking. The Customer Number, Name and Phone Number are brought in automatically from the fields on the 'Contact' card. No default Activity Type will be offered, while the Task Type will be To Do. The Start Date of the Activity will be the current date, and the Person will be the current user.

After amendment if necessary, save the record in the Activities register by clicking the [Save] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Activity, remove it using the 'Delete' function on the Record menu.

Registering Contacts to your Customers

Contacts can be arranged in hierarchies, a contact can have many other contacts connected to it. All the connected contacts will be shown in a list in the contact window. For example — a contact of type Customer might have a number of other contacts of type Contact Person connected to it. If you want to add a 'sub contact' to a contact, use the 'Create Contact' function on the Operations menu.

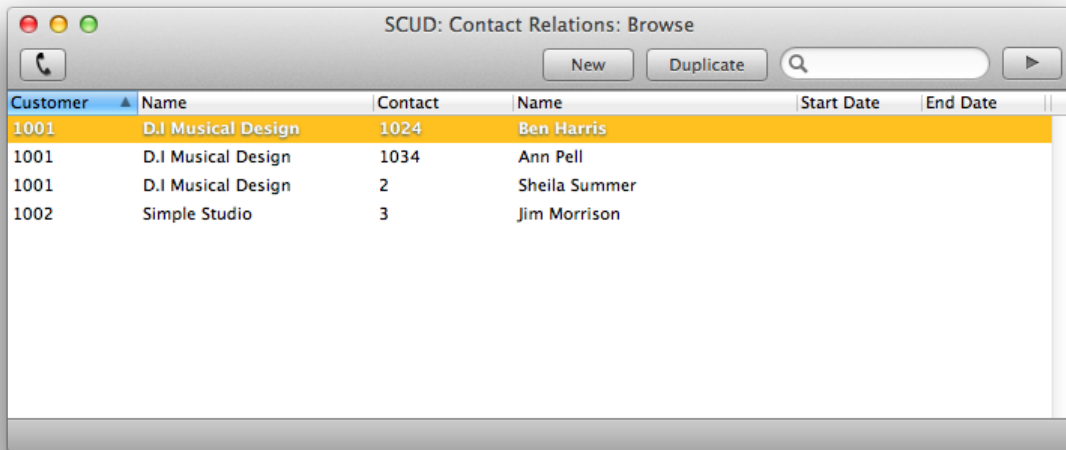


A new record will be created in the Contacts register and will be opened in a new window entitled 'Contact: Inspect'. This means the record has already been saved and is being opened to allow you to enter the Contact Person's name and contact details if these are different to those of the parent company.

The address details, telephone and fax will be copied from the parent company. Enter the Contact Person's name and appropriate contact information. As the Contact Person works for a company that has been marked as a Customer, you should not check this box in the Contact Person record.

When creating a contact this way the contact will be connected to the current contact and added to its contact person grid.

The relation between different contacts is stored in a setting called 'Customer Relations'.



The screenshot shows a window titled "SCUD: Contact Relations: Browse". It features a table with columns: Customer, Name, Contact, Name, Start Date, and End Date. The first row is highlighted in yellow.

Customer	Name	Contact	Name	Start Date	End Date
1001	D.I Musical Design	1024	Ben Harris		
1001	D.I Musical Design	1034	Ann Pell		
1001	D.I Musical Design	2	Sheila Summer		
1002	Simple Studio	3	Jim Morrison		

From the setting Contact Relations you can add specific email address per contact and company and when running the customer status report the activities that are created for this contact and company are shown.

Finding Contact persons to your Customers

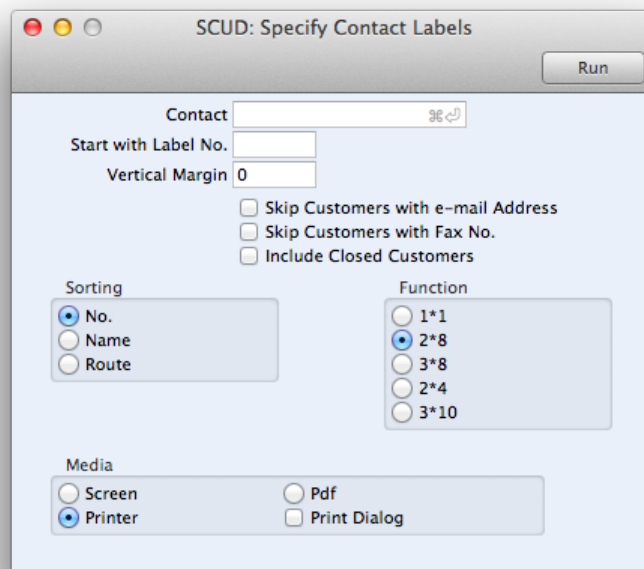
To find a specific Contact, you can sort the 'Contacts: Browse' window by the field you want to search (e.g. Customer No.) and type the string to search for into the search field. Further search functionality is available from the Operations menu of the Browse window (e.g. to search Contact by e-mail).

Reporting on Contacts

There are many reports on Contacts. More information about different reports is under Reports chapter.

Printing Contact Labels

You can use this function to print Addresses of contact who You have not reached by fax or e-mail and send them Customer Letter by regular mail. This document prints name and address labels to Customers. The Invoice Address on the 'Contact' card of each Customer record is used. You can print Contact Labels under the Documents icon, by selection 'Contact Labels' option.



The screenshot shows a dialog box titled "SCUD: Specify Contact Labels". It contains several input fields and options:

- Contact:** A text input field with a search icon.
- Start with Label No.:** A text input field.
- Vertical Margin:** A text input field with the value "0".
- Options:**
 - Skip Customers with e-mail Address
 - Skip Customers with Fax No.
 - Include Closed Customers
- Sorting:**
 - No.
 - Name
 - Route
- Function:**
 - 1*1
 - 2*8
 - 3*8
 - 2*4
 - 3*10
- Media:**
 - Screen
 - Printer
 - Pdf
 - Print Dialog

A "Run" button is located in the top right corner.

Closing Contacts

Switch on checkbox 'Closed' if the contact is no longer to be used. Closed contacts will appear in the 'Contacts:Browse' window but not in the contacts 'Paste Special' list. A closed contact can be opened again at any time.

REPORTS

Reporting on Contacts

Activities, Contacts

This report lists Activities of all Task Types, sorted by Customer. The Private Activities of the Person producing the report are marked with an asterisk (*). The Private Activities of other users are not shown in the report.

SCUD: Activities, Customers/Suppliers					
Activities, Customers/Suppliers			Standard CRM by HansaWorld, Print date: 17-09-2012 09:37		
Standard CRM UK DEMO			Period 01-01-2012 : 31-12-2012		
			Person:		
1 Samuel Jackson					
	Date	Activity	Person	Contact	Comment
38	14-09-2012		SI		
1001 D.I Musical Design					
	Date	Activity	Person	Contact	Comment
11	10-09-2012	4 SM	SI	Sally Johnson	Sales meeting
10	13-09-2012	SM	SI	Sally Johnson	Sales
42	13-09-2012	SM	*SI	Sally Johnson	Private
39	14-09-2012	CS	SI	Sally Johnson	Call to sign discount agreement
41	14-09-2012		SI	Sally Johnson	
4					
1002 Simple Studio					
	Date	Activity	Person	Contact	Comment
40	14-09-2012	CE	SI	John Woods	Make a new deal with the customer
1003 Blue Viola Inc					
	Date	Activity	Person	Contact	Comment
15	05-09-2012	2 CS	SI	Simon Black,Ann Taylor	Support
16	05-09-2012	4 SC	SI	Simon Black,Ann Taylor	Sales calls
14	06-09-2012	2 CS	SI	Simon Black,Ann Taylor	Support
34	07-09-2012	2 SM	SI	Simon Black,Ann Taylor	Sales meeting
35	07-09-2012	SM	SI	Simon Black,Ann Taylor	Sales meeting
10					


Birthday List

This report lists Contacts in the Contact Person register, together with contact details (telephone, fax and mobile numbers and email address).

Birthdays		Standard CRM by HansaWorld, Print date: 17-09-2012 09:40	
Standard CRM UK DEMO		Period 01-01-2012 : 31-12-2012	
DD/MM	Name	Title	Birthdays
Comp. Code	Company Name	Department	E-mail
Phone	Mobile	Fax	
10-04-2012	Ann Pell		10-04-2012
1001	D.I Musical Design		
01533-1566-287	077-4441-8873	01533-1566-288	ann@gsc.com
224 Main Street			Bedford
			Create Reminder in Day Planner
27-08-2012	Ben Harris		27-08-2012
1001	D.I Musical Design		
0130-299-377	077-366-977	0130-299-444	ben@housing.ilike.com
673 Green Street			Luton
			Create Reminder in Day Planner
14-09-2012	Sheila Summer		14-09-2012
1001	D.I Musical Design		
020-7060-0008		020-7060-0088	No E-mail address
310 5th Ave		Rockingham way	London
			Create Reminder in Day Planner

Contact List

This report is a simple listing of all the Customers in the Contacts register. You can also produce this report for an individual Customer by clicking the Printer icon when that Customer is open in a record window. In this case, it will be printed as if you are using the Include All Contact Persons option.



Customer: Use this field to limit the report to a single Customer in the Contact register, or range of Customers.

Salesman: To restrict the report to Customers assigned to a single Salesman, enter a Salesman's initials here.

New or updated since: This field refers to the Last Changed field on the 'Misc' card of the Contact record: you can use it to list recently entered or changed Customers.

Include all Contact Persons: As well as printing each Customer's details, this option will list the Contact Persons working for them.

Skip Contacts with E-mail Address/Fax No./Mobile: Check this box if you do not want Customers that have email addresses, fax numbers or mobile numbers to be shown in the report.

Sorting: These radio buttons control the sort order of the report. The default is to print the report in Customer Number order, but you can also print in Name, Category (note: Customer Category field might not be available on the Contact record, it depends on additional packages that you might have bought) or Telephone Number order.

Function: These radio buttons control the level of detail shown in the report.

- Detailed: This, the default option, prints a comprehensive report that includes virtually all the information stored for each Customer.
- Telephone: This choice produces a simple list showing the Contact Number, Name and Telephone Number of each Customer.
- Fax: This option is the same as the previous one, with the exception that Fax Numbers are printed instead of Telephone Numbers.
- E-mail: This is also the same as the Telephone option, with the exception that Email Addresses are printed instead of Telephone Numbers.

Include: Use these options to specify whether Closed Customers (Customers whose Closed box on the 'Misc' card is checked) are to be included in the report.

Click 'Run' to run the report.

SCUD: Customer List

Customer List Standard CRM by HansaWorld, Print date: 17-09-2012 10:13
 Standard CRM UK DEMO All Customers
 Overview All Salesmen
 Sorted by Number

No	Name Address	Contact
1001	D.I Musical Design 310 5th Ave Rockingham way London Surrey SW1 W0SR Delivery Address test Pay Terms: 30	Sally Johnson Tel: 020-7060-0008 Fax: 020-7060-0088 Mobile: 077-355-221 info@didesign.com
1002	Simple Studio 22 Meridian Road Rushden Northants NN133BY Delivery Address 53 London Road Rushden Northants NN133BY Pay Terms: 14	John Woods Tel: 01536-888-328 Fax: 01536-888-322 info@simplestudio.com
1003	Blue Viola Inc 19-75 West Melrose Street Northampton Northants NN14 4NS Pay Terms: 14	Simon Black,Ann Taylor Tel: 01536-283-328 Fax: 01536-888-111 Mobile: 077-577-999 sales@bg.com

The Contact List report has the Standard CRM Drill-down feature. Click on any Customer Number in the report to open the Contact record for that Customer.

Customer Status

For a 360° overview of all actions regarding a certain customer, go to the operations menu and run the customer status report. With this report you have all information in one place.

List Invalid Phone Numbers

You can use the List Invalid Phone Numbers report to list telephone and mobile numbers containing illegal characters. If you print the report to screen, you can drill down to each Contact to make the correction.

SCUD: List of Contacts with Invalid Phone Numbers

List of Contacts with Invalid Phone Numbers Standard CRM by HansaWorld, Print date: 17-09-2012 10:18
Standard CRM UK DEMO

Code	Name	Field	Phone Number
1016	String Specialists	Phone	0113-222-5777??
		Fax	0113-222-5778??
1033	Oliver Race	Phone	0113-222-5777*%
Number of Contacts:			39
Invalid Contacts:			2

Reporting on Time

Activities, Persons

This report lists Activities of all Task Types, sorted by Person.

SCUD: Activities, Persons

Activities, Persons Standard CRM by HansaWorld, Print date: 17-09-2012 10:20
Standard CRM UK DEMO Period 01-08-2012 : 31-08-2012
Person SJ

Activities					
SJ Samuel Jackson					
Date	Activity	Customer	Contact	Cost P	Comment
27-08-2012	LD			8,00	Vacation
28-08-2012	LD			8,00	Vacation
29-08-2012	LD			8,00	Vacation
30-08-2012	SC			8,00	Sales tasks
31-08-2012	SC			4,00	Sales tasks
			Time	36,00	Number of Activities
					5
				36,00	5

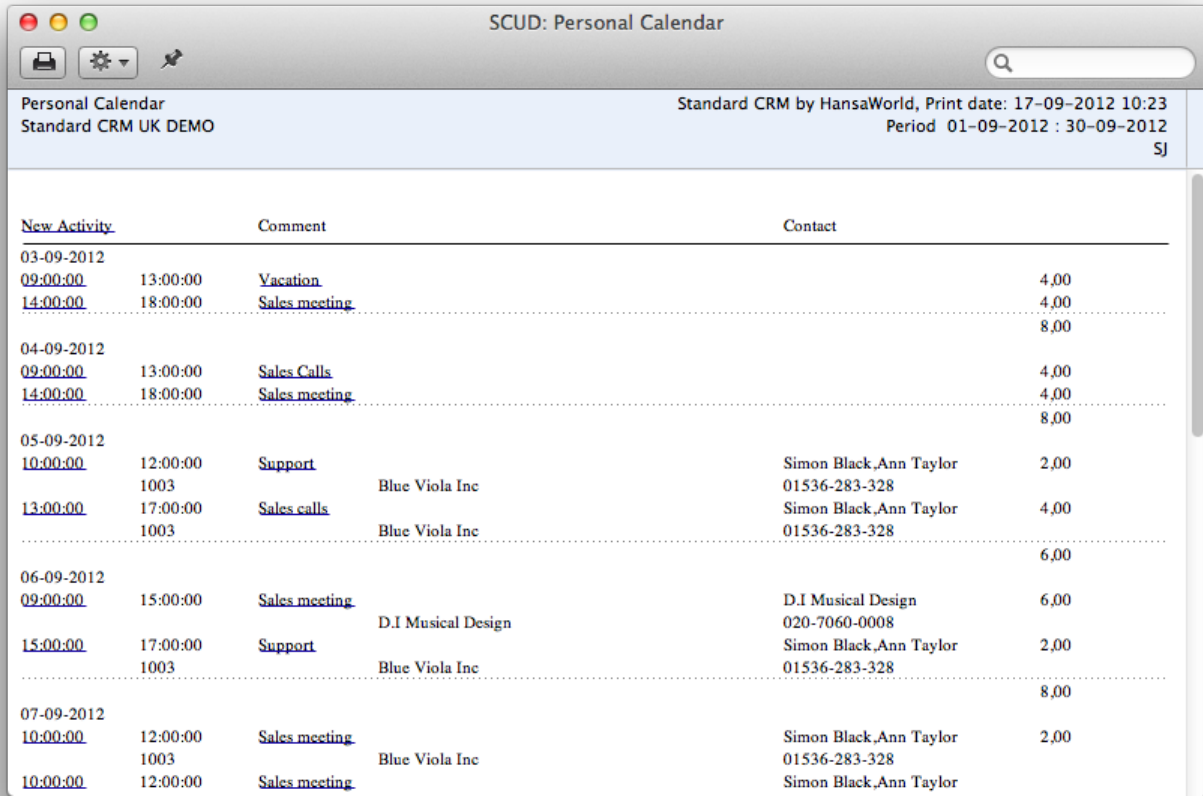
Activity History

Enter the period and customer number or leave it blank to show all activities for all customers in the specified period. This report will show a list of all activities created during the specified period, per customer, regardless of whether these activities are marked as done or not, and will list all Task Types and Calendar Types. The report will show for each activity the Start and End Times, the Contacts number and the comment that was written in the 'Text' field. You can drill down to each

individual activity record to see further information about the activity.

Personal Calendar

The Personal Calendar report is effectively a report version of the Calendar. As with the Calendar, it shows Calendar activities only. They are sorted into Start Date and Start Time order.

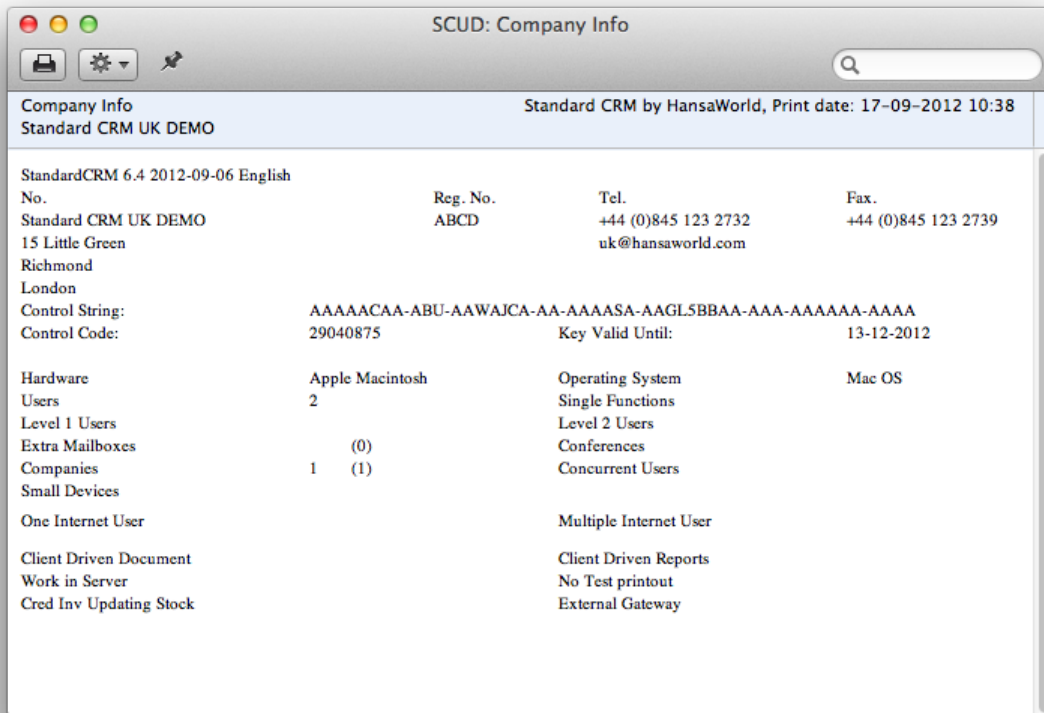


<u>New Activity</u>		<u>Comment</u>		<u>Contact</u>	
03-09-2012					
09:00:00	13:00:00	Vacation			4,00
14:00:00	18:00:00	Sales meeting			4,00
					8,00
04-09-2012					
09:00:00	13:00:00	Sales Calls			4,00
14:00:00	18:00:00	Sales meeting			4,00
					8,00
05-09-2012					
10:00:00	12:00:00	Support		Simon Black,Ann Taylor	2,00
	1003		Blue Viola Inc	01536-283-328	
13:00:00	17:00:00	Sales calls		Simon Black,Ann Taylor	4,00
	1003		Blue Viola Inc	01536-283-328	
					6,00
06-09-2012					
09:00:00	15:00:00	Sales meeting		D.I Musical Design	6,00
			D.I Musical Design	020-7060-0008	
15:00:00	17:00:00	Support		Simon Black,Ann Taylor	2,00
	1003		Blue Viola Inc	01536-283-328	
					8,00
07-09-2012					
10:00:00	12:00:00	Sales meeting		Simon Black,Ann Taylor	2,00
	1003		Blue Viola Inc	01536-283-328	
10:00:00	12:00:00	Sales meeting		Simon Black,Ann Taylor	

Reporting on your company

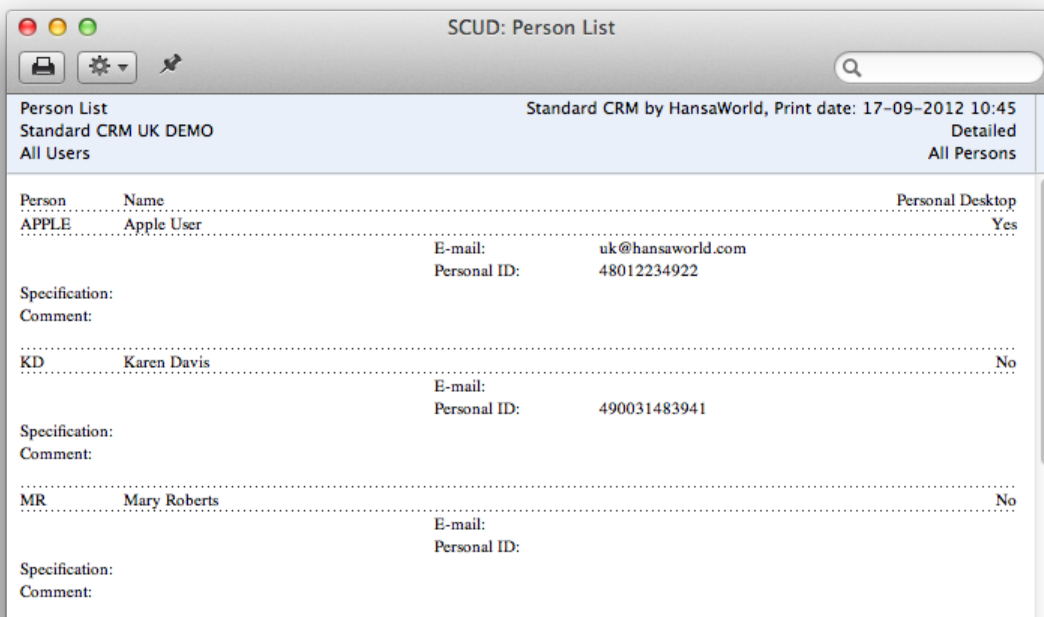
Company Info

This report is effectively a print-out of the Company Info setting. It also shows licensing information such as the Control String and Control Code.



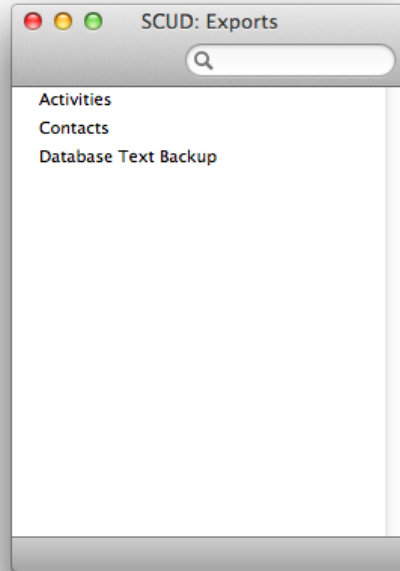
Persons List

This report lists the records in the Persons setting. As well as each Person's initials and name, the report also indicates whether the Person has Personal Desktop activated or not. And if you run the report with option 'Detailed' activated, then the Personal ID and Email Address will also be shown.



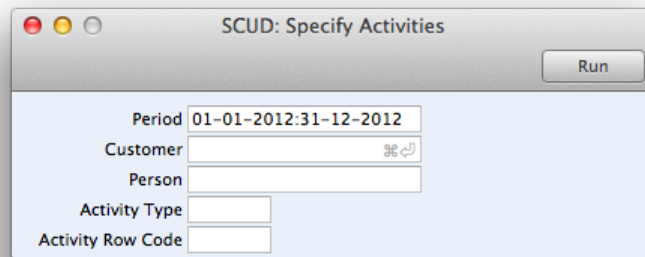
EXPORTING INFORMATION FROM STANDARD CRM

It is very simple to export information from Standard CRM to a text file. Click the 'Routines' icon to open a list of routines, and then click the 'Exports' icon to open a list of export functions. You can also use Cmd-E to open this list.



Activities

Double-click Activities Registers. With this function you can export activities. Enter the period and customer number or leave it blank to export all the activities from all the customers in the specified period. Click the 'Run' button.

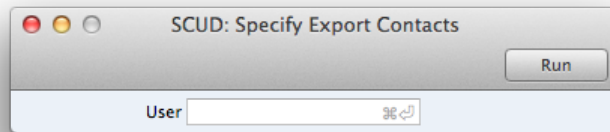


The standard 'Save' dialogue will appear, allowing you to name the backup file and decide where you want it to be saved.

When you click 'Save', a text file will be created and saved. You can open this file using any word processor, spreadsheet or text editing application. This file can also be imported again to other applications of HansaWorld, that have the same register.

Contacts

Double-click Contacts. With this function you can export Contacts. Enter the user or leave it blank to export all Contacts. Click the 'Run' button.



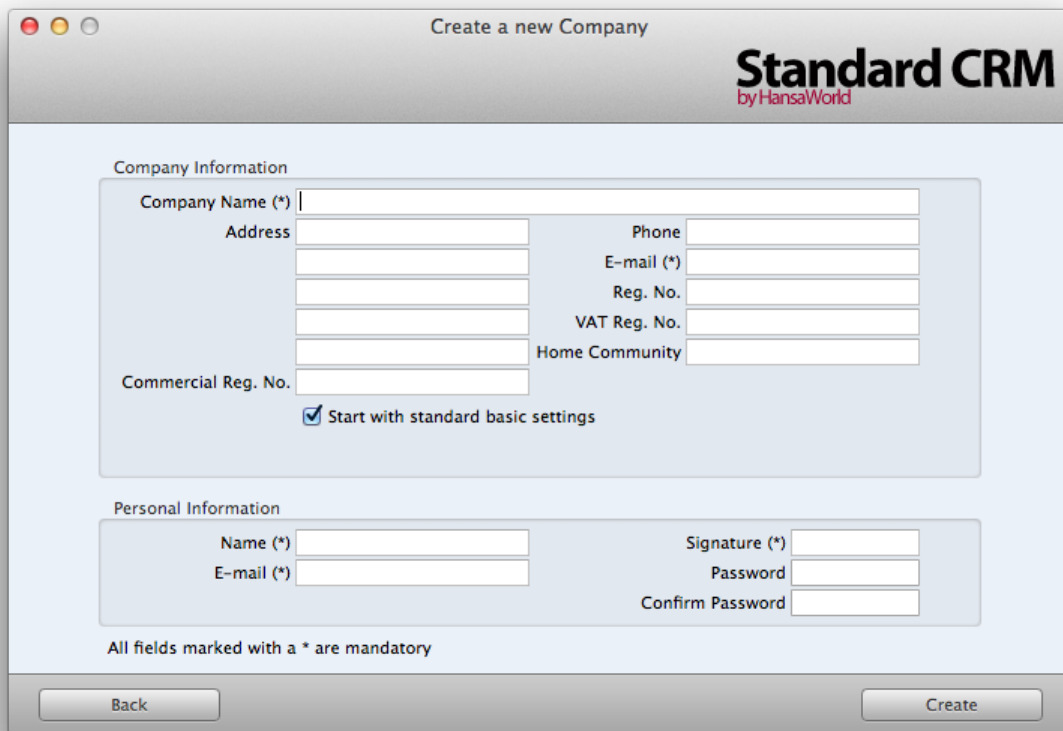
The standard 'Save' dialogue will appear, allowing you to name the backup file and decide where you want it to be saved. When you click 'Save', a text file will be created and saved. You can open this file using any word processor, spreadsheet or text editing application. This file can also be imported again to other applications of HansaWorld, that have the same register.

REGISTERING YOUR PRODUCT

After installing Standard CRM by HansaWorld, you should register it with HansaWorld. This registration process will provide you with an Enabler Key. When you install Standard CRM, this Key will be absent. The program will be fully operational for 30 days after installation. This allows time for the set-up work and to test the suitability of the software. After 30 days, if you have not registered to apply for your Key, the program will change to restricted mode: It will remain fully functional, but printing will be disabled.

Registering for an Enabler Key requires the computer containing Standard CRM by HansaWorld to be connected to the Internet.

After you've installed STD CRM by HansaWorld and choose option 'New Installation', the 'Create a new company' window will appear as follows:



Create a new Company

Standard CRM
by HansaWorld

Company Information

Company Name (*) |
Address | Phone |
| E-mail (*) |
| Reg. No. |
| VAT Reg. No. |
| Home Community |
Commercial Reg. No. |
 Start with standard basic settings

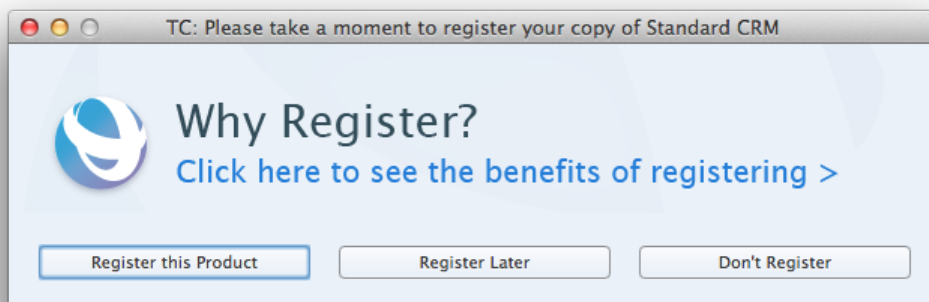
Personal Information

Name (*) | Signature (*) |
E-mail (*) | Password |
| Confirm Password |


All fields marked with a * are mandatory

Back Create

Once you've entered the details, when you press the [Create] button, you will be guided through the registration process, where the following window will show:



TC: Please take a moment to register your copy of Standard CRM

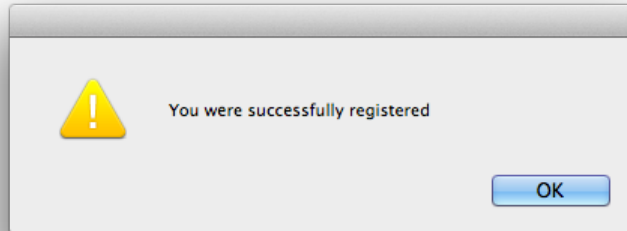
 **Why Register?**
[Click here to see the benefits of registering >](#)

Register this Product Register Later Don't Register

You can choose at this point of the installation to register the product, register the product later or not to register.

Register this Product Option:

If you choose to register the product at this point, then you should press option [Register this Product], the program will then show the 'company Information' window with details of your company, which you can complete if there are any blank fields, and press the [Next] button to proceed (at this point you can also press button [Register Later] if you choose to register later). You will then receive the message that you were registered successfully, press the [Ok] button to be taken to the Master Control Panel and start working immediately on Standard CRM by HansaWorld.

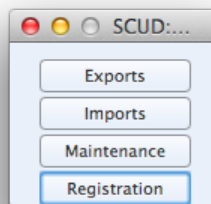


Register Later Option:

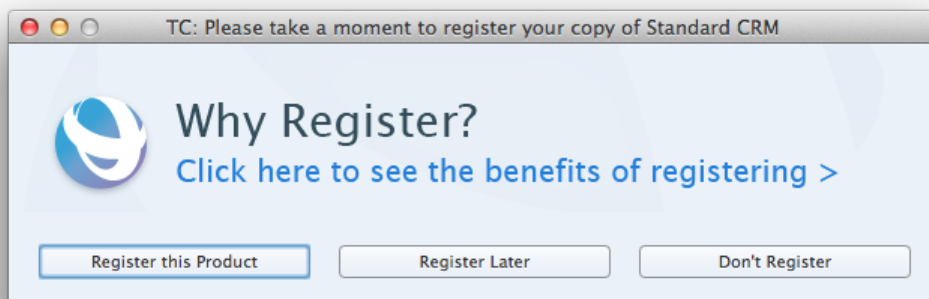
If you chose not to register the Product, but to rather register later, you will be taken to the Master Control Panel, and work normally.

When you decide to register the product follow these steps:

1. Click the [Routines] button in the Master Control panel. A window containing a separate button for each routine will appear:



2. Click the [Registration] button in the list of routines.



3. Click the [Register this Product] button.

4. The process will then proceed as described above.

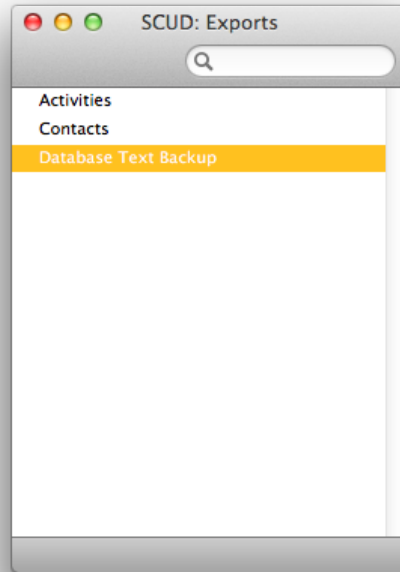
Once a month your copy of Standard CRM by HansaWorld will connect to the HansaWorld server automatically to get a new Enabler Key. The new Key will add one month to the Valid Until date.

BACKING UP AND RESTORING THE DATABASE

Creating a Database Text Backup

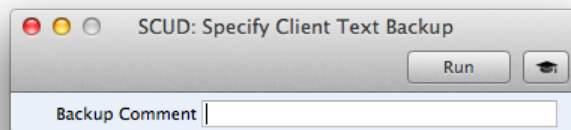
The method of backing up with Standard CRM is fast and economical. The data will be saved in a back-up file that takes up a minimal amount of space, and the back-up files are independent of the program versions. This means that restoring from a back-up file will be successful, even if you have updated the version of your application since doing the back-up. This is known as the "text back-up" method of backing up.

To create a text back-up, Click the [Routines] button in the Master Control panel and then [Exports]. Alternatively, use the ⌘-E keyboard shortcut.



In the Exports window, double-click 'Database Text Backup' to back up the whole database.

The 'Specify Client Text Backup' window appears. Here you can enter a description of the back-up file that you are about to create. You can use up to 40 characters. If you later need to restore from a back-up, this description will be shown in the list of importable files to help you select the correct one.



Enter an appropriate description and click [Run].

A dialogue box will open, allowing you to name and place the export file. Enter the name of the file in the filename area and locate it in the appropriate folder or directory in the usual way. The name of the back-up should include the date the back-up was made, in order to avoid confusion. For ease of importing later, it is recommended that you do not include spaces or other non-alphabetic characters in the name of your back-up file, and that you give it a .txt extension. Then, click [Save]. A message window informs you about the progress of the export.

When the export is finished, you are brought back to the 'Exports' list. Close it using the close box.

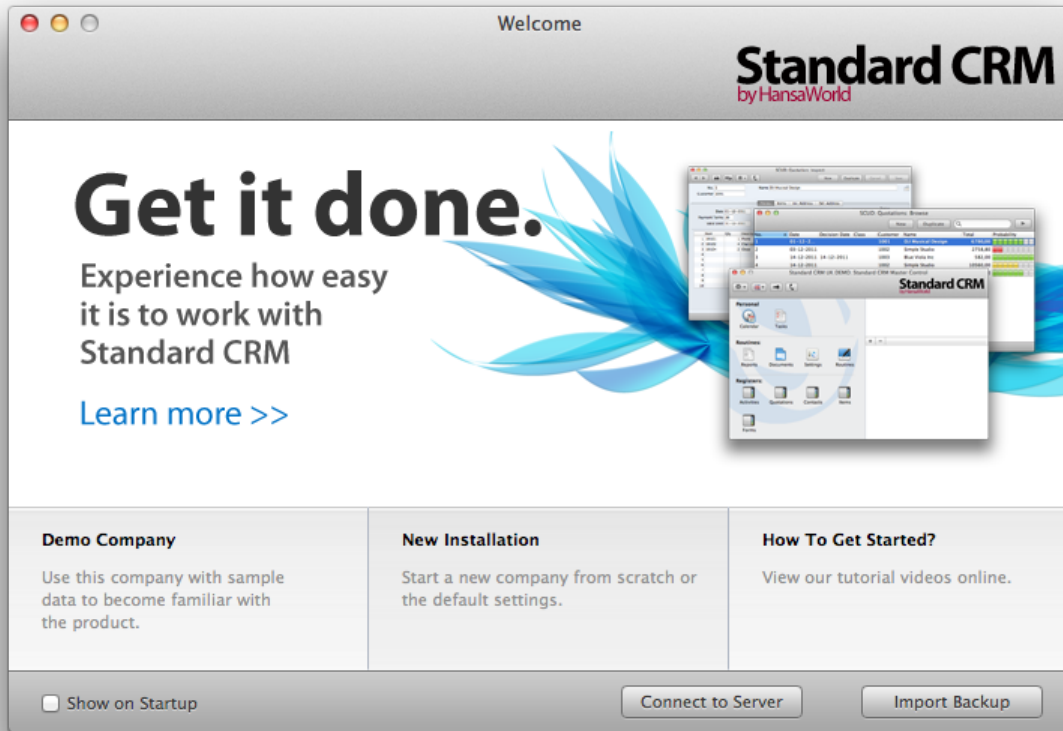
Restoring from a Backup

Follow these steps:

Locate the "com.hansaworld.stdcrm.uk.versionnumber" folder on your hard disk. If you have placed the Standard CRM

application in your 'Applications' folder the "com.hansaworld.stdcrm.uk.versionnumber" folder will be stored in Home/Library/Containers.

Delete this folder, then go back to the Applications folder and restart Standard CRM application, you will get the following window:



press [Import Backup] button, you will get a dialogue box to choose the backup file, so that the backup data will be imported, once you press the [Open] button.

APPENDIX

Terminology between different versions of english language

The language used in this material is British English. There can be slight differences between other versions of the English language, which can lead to confusion. This table should help to clear these up. It has been sorted alphabetically.

British	USA	Canada	Australia + New Zealand	Singapore
Cheque	Check	Cheque	Cheque	Cheque
Colour/coloured	Colour/coloured	Colour/coloured	Colour/coloured	Colour/coloured
Credit Note(CN)	Credit Memo (CN)	Credit Memo (CM)	Credit Note (CN)	Credit Note
Dialogue	Dialog			
Instalment	Instalment			
Jewellery	Jewellery	Jewellery	Jewellery	Jewellery
Licence (noun)	License	Licence	Licence	Licence
Mileage Claim	Miles	Way Lists	Mileage Claim	Mileage Claim
Miles	Miles	KM	KM	KM
Mobile	Cell	Mobile	Mobile	Mobile
Nominal Ledger (NL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)
Post Code	ZIP Code	Post Code	Post Code	Post Code
Purchase Ledger	Payable (PL = AP)	Payable (PL = AP)	Purchase Ledger	Purchase Ledger
Sales Ledger	Receivable (SL=AR)	Receivable (SL=AR)	Sales Ledger	Sales Ledger
Salesman	Salesperson	Salesperson	Salesman	Salesperson
Stock	Inventory	Inventory	Stock	Inventory
Stocktake	Inventory Count	Inventory Count	Stocktake	Inventory Count
Stock Depreciation	Inventory Adjustment	Inventory Adjustment	Stock Depreciation	Inventory Adjustment
Supplier	Vendor	Vendor	Supplier	Vendor
VAT	Sales Tax or Tax	Tax (ideally GST/PST)	GST	GST/SST/HST