



Customer Relationship
Management

CRM.Win Administrator Guide

Version 14.1

Notices

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Preface

For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	Fixed-width font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	Bold Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	Bold sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter <code>-LOGF</code> .
[]	Brackets enclose optional arguments.
{ a b c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

1

Introduction

This manual is intended for Aurea CRM win administrators.

This manual covers the following:

- Configuration of Aurea CRM win, see [Configuration Module](#) on page 14.
- Importing and exporting data for external systems, see [Import/Export](#) on page 17.
- Communication between stations to synchronize data (main office, branch offices, laptops etc.), see [Communication](#) on page 84.
- Customizing the Aurea CRM win user interface, see [User Interface](#) on page 168.
- Analyzing data in Aurea CRM win, see [Analysis Module](#) on page 313

Additional information is provided in the following manuals:

- For details on installing Aurea CRM win, refer to the [Aurea CRM win Installation Guide](#).
- The administration and configuration of Aurea CRM core functions (access rights, data model etc.) are described in the [CRM.core Administrator Guide](#).
- For more information on the user interface and basic functions in Aurea CRM win, refer to the [Aurea CRM win User Manual](#).
- For information on the Aurea CRM Business Logic, refer to the Business Logic Manual for your vertical.
- For details on the meaning and functionality of individual database fields, refer to the field help.

Information on the structure of the Aurea CRM database (tables, fields, indices etc.) can be found in the **Data Model** (in the Aurea CRM win **Maintenance** module). You can also output the database structure as text or XML files (see [mmba.exe Parameters](#) in the *Aurea CRM.core Administrator Guide*).

All available documentation can be found on the Aurea CRM support page at <https://support.aurea.com>.

If not mentioned otherwise, all examples in this manual apply to the BTB vertical.

Directory structure

The directory structure is required to start the individual modules.

Do not change the directory structure added during the installation.

When adding a new user, a directory with the same name as the user name is added automatically. The `\SU` directory is the supervisor's directory and is automatically created during installation.

In both stand-alone and network installations, each user is assigned a personal user directory. User settings, selections, mail-merge documents etc. are stored in this directory, see `<user name>` on page 11.

Access Rights

When a user starts a module, the system creates temporary files that are deleted when the module is closed.

You should therefore ensure that users have the privileges necessary to read, write and delete files in their sub-directories.

The following rights are required:

Data Directory	User Rights	Administrator Rights
<code>\<user name>\ db</code> <code>\<user name>\ frm</code> <code>\<user name></code>	Write, Erase, Create	Write, Erase, Create
<code>\system\ db</code>	Write, Create, Read, Modify	Write, Create, Read, Modify, Erase
Program Directory	User Rights	Administrator Rights
<code>\system\exe</code>	Execute	Execute
<code>\system\ frm</code>	Write, Create, Read	Write, Create, Read, Erase
<code>\system\sys</code>	Read	Write, Create, Read

\system

Learn about the `\system` directory structure.

The `\system\com\system\di`

and

`\system\ frm`

directories are required by Aurea CRM win in order to operate.

\system\exe

This directory contains:

- the program and library files, see [Aurea CRM win Modules](#) on page 12
- the online help
- the program icons (*.ico)
- the win_patch_history.txt file

\system\db

This directory contains:

- log files, see [Logs and Error Messages](#) in the *CRM.core Administrator Guide*.
- files containing information on the data structure and user interface, see [mmba.exe Parameters](#) in the *CRM.core Administrator Guide*
- the file mmsms.ini, used to send SMS as part of activities, see mmsms.ini File in the *User Manual*.

\system\sys

This directory contains the system settings:

- dokupfad.asc: global document directory, see [Directories](#) in the *User Manual*
- mm.ini: more system settings, see [mm.ini File](#)

\system\xml

This directory contains the graphics, XML and XSLT files used by reports and the print and XML views of formats.

- ..\calendars: XML file containing holidays, see *Defining Calendar Settings* in the *CRM.core Administrator Guide*
- ..\images: Icon files and style sheets for XML reports and XML views of formats, see *Reports and Formats* in the *CRM.Win User Manual*.

\<user name>

Whenever a new user is added, a corresponding directory with the same name as the user name is created.

This directory contains user-specific settings stored in the following files:

- pro*.cfg: Current UI settings (masks, lists, calendar, search results) for each module, see [Module Numbers](#) in the *CRM.core Administrator Guide*. Delete a user's pro*.cfg files to reset the user's settings.
- dokupfad.asc: User-specific document directory
- dokusys.asc: User-specific settings relating to the word processor and spreadsheet in use






- `*mtmp.doc`: Control files used to transfer data to the word processor, see [Word Processor](#) in the *User Manual*
- `mm.cfg`: User-specific settings configured by selecting **Extras > Other Options**.
- `mm.ini`: User-specific system settings required before Aurea CRM is started, see `mm.ini` file.
- `gm.ini`: Mask generator settings, see [Mask Generator](#) on page 169






\<user name>\frm

This directory contains log files (`merge<Link to Info Area>.txt`), created if an error occurs when merging companies/persons, see [Managing Companies and Persons](#) in the *User Manual*.

Aurea CRM win Modules

This topic has a list of CRM win modules.

Start Menu	exe	Description
	<code>mmba</code>	The Aurea CRM win main module: Customer data is added and managed in the main module, see <i>User Manual</i> .
	<code>mmpr</code>	The Print module, see <i>User Manual</i> .
	<code>mmri -w</code>	Use the Maintenance module to administer the database. You can add and update catalog values, info areas and fields, update or delete large numbers of records etc., see Maintenance Module in the <i>CRM.core Administrator Guide</i> .
	<code>mmim</code>	Use the Import module to import data into Aurea CRM from other systems, see Import/Export on page 17.
	<code>mmim -e</code>	Use the Export module to export data for use in other systems in a variety of formats, see Import/Export on page 17.

Start Menu	exe	Description
	mmco	Use the Communication module to transfer data between the main office and other stations (e.g. notebooks), see Communication on page 84.
	mmba -r	Use the Rebuild module to restore damaged database tables, see Rebuild Module in the <i>CRM.core Administrator Guide</i> .
	mmri	Use the Rights module to define Aurea CRM access rights, see Rights Module in the <i>CRM.core Administrator Guide</i> .
	mmcfg	Use the Configuration module to display license information and to configure user data such as the name, personnel number, initial password, module access rights etc., see Configuration Module on page 14.
	mmam	Use the Analysis to display marketing and sales-relevant information clearly, in either tabular or graphical form, see Analysis Module on page 313.

Starting Modules

Learn how to start modules.

You can start the Aurea CRM win modules in different ways:

- From the **Start** menu
- From other Aurea CRM win modules by selecting **Window > Modules** from the menu
- From the command line, [Aurea CRM Commands and Parameters](#) on page 343

Note: Users can only access modules if they have the necessary access rights, see [Module Access Rights, System Locks and Process Tracking](#) in the *CRM.core Administrator Guide*.

Configuration Module

Learn to manage users and allocate station number.

Use the **Configuration** module to to:

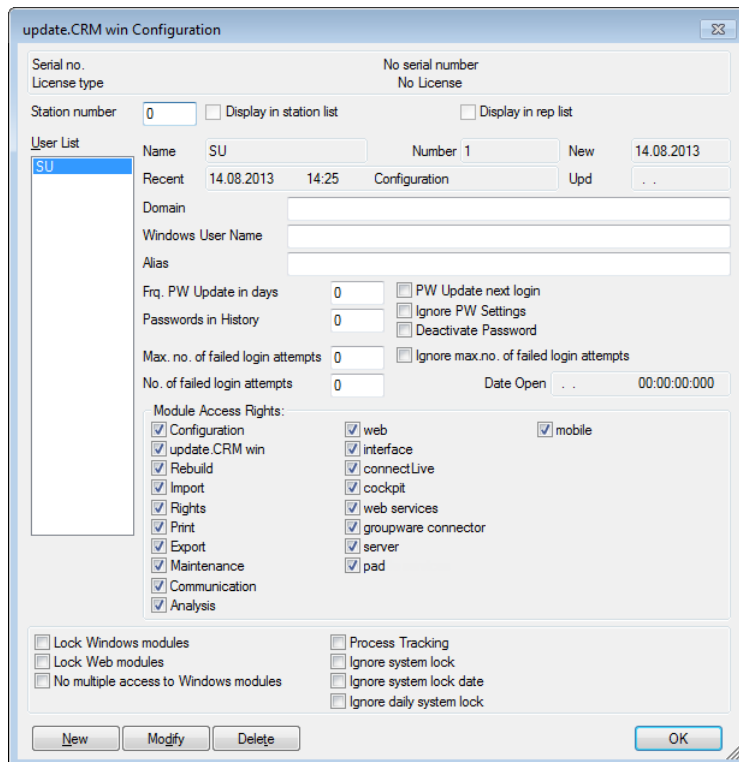
- Allocate a station number, see *Aurea CRM win Installation Guide*.
- Add users (user names and passwords), see [Adding, Editing and Deleting Users](#).
- Edit users' password settings and module access rights, see *Password Settings and Module Access Rights, System Locks and Process Tracking* in the **CRM.core Administrator Guide**.

Adding, Editing and Deleting Users

Aurea recommends adding your company's employees in the **Rep** info area, see [Defining Reps](#) in the **CRM.core Administrator Guide**. Select **Configure Login** from the context menu in the **Rep** info area to set their Aurea CRM user name and password, see [Configuring Logins](#) in the **CRM.core Administrator Guide**.

To add a user (login) without adding a rep:

1. Start the **Configuration** module, see [Starting Modules](#) on page 13.



2. Click the **New** button.

The **New update.CRM User** dialog box is displayed.

3. Enter the user name to be used to log on to Aurea CRM in the **Name** field.
The name is limited to a maximum of eight characters and may not contain spaces or special characters.
4. Enter a login password for the user in the **Password** field.
As administrator, you can assign passwords to each user. The maximum password length is 128 characters. For details on configuring password options and security, see [Password Security](#) in the *CRM.core Administrator Guide*.
Only the SU can change the SU password.
5. Click **OK**.
The user you added is displayed in the user list. A user directory with the same name (including the necessary sub-directories) is created.
6. Make any additional settings, see [Password Settings and Module Access Rights, System Locks and Process Tracking](#) in the *CRM.core Administrator Guide*.

Note: Users (apart from the SU) added in the **Configuration** module can only start the **Rebuild** module.

7. Click **OK** to close the **Configuration** module.

To change existing user information:

1. Start the **Configuration** module.
2. Select the user you wish to edit from the list of **Users**.
3. Click **Modify**.
4. Make any desired changes.
5. Click **OK**.
6. Edit any additional settings, see [Password Settings and Module Access Rights, System Locks and Process Tracking](#) in the *CRM.core Administrator Guide*.
7. Click **OK** to close the **Configuration** module.

To delete a user:

1. Start the **Configuration** module.
2. Select the user you wish to delete from the list of **Users**.
3. Click **Delete**.
4. Click **OK**.
5. Click **OK** to close the **Configuration** module.

Note: When you delete a user from the user list, the user is only removed from the user list. The user directory is not deleted. You can thus reuse existing user-specific settings for other users.

Creating the Program Group

If you did not carry out the installation procedure locally, you need to provide the user with corresponding icons and shortcuts on their local computer:

1. Start the Aurea CRM win main module on the user's local computer.
2. Log on with the user's name and password.
3. Select **Help > Create Program Group**.

The system adds the Aurea CRM win program group to the start menu with links to all modules that the current user has been granted access to.

2

Import/Export

Use the **Import** and **Export** modules to exchange data between Aurea CRM and external systems (databases, spreadsheets, etc.).

You can export Aurea CRM data to external files or to external databases directly. The supported databases are **Oracle** and **MSSQL**. Exporting and Importing in general follow the following steps.

1. Create an import or export format, see [Defining an Import/Export format](#) on page 19.

Note: If you are importing data, you also need to verify that you have met all the import requirements (see [Import and Export Requirements](#) on page 17) and define your match-up settings (see [Match-up](#) on page 58). You require read access to the data you wish to export.

2. Execute the import or export, see [Executing the Import](#) on page 79 and [Executing the Export](#) on page 81.

You can also execute imports and exports from the command line.

Imports can also be carried out in Aurea CRM web and via a CRM.server to-do or job, see [Import](#) in the *Aurea CRM web Administrator Guide* and [CRM.server](#) in the *CRM.core Administrator Guide*.

Exporting all catalog values using the export module only exports variable catalog values but not the fixed catalog values. Fixed catalog values are part of the data model and are stored in the database as binary data and cannot be retrieved directly.

To export fixed catalog values, see [Exporting Fixed Catalog Values](#) on page 57.

Import and Export Requirements

Learn about importing and exporting to external database.

User Rights

All restrictions defined for a rep in the rights format also apply during the import or export of data, see [Rights and Import/Export](#) in the *CRM.core Administrator Guide*.

Import File/Import Database

The **import file** needs to meet the following requirements:

- The file must be stored in a supported format, see [File Format](#) on page 36.
- The lengths of the individual import fields can be fixed or variable.

If you are using fixed field lengths, you need to define the exact length of each field in the import format in Aurea CRM.

If the field lengths are variable, you need to specify the separator character in the import format (e.g. comma, semicolon) or delimiters (e.g. all field contents in quotation marks).

- Records of variable length **must** be distinguished using a separator (e.g. line break). For records of fixed length a separator between records is optional.
- If a field is empty, a field separator must be included (in this case a semicolon).
Example: Smith & Co;;London
- The contents of fields in the import file do not need to correspond to the usual content in Aurea CRM. Text data can be transformed during the import process.
- If the import file contains fields whose content are not required in Aurea CRM, you can suppress these fields in Aurea CRM by replacing the contents with placeholders during the import process.
- Aurea advises against importing more than 300 fields at once.
- Imported records can only be added if data is available for all mandatory fields defined in the data model; e.g. the **Currency** field in the **Offer** info area.
- Additional mandatory fields can be defined for individual reps in their access rights. These mandatory fields are also tested for content during the import process.
- You can define default values that are used if mandatory fields are empty.
- To match up (and merge) imported data with existing data in Aurea CRM, the import file must contain unique key fields used to compare internal and external records, see [Match-up Logic for other Info Areas](#) on page 65. This is not always necessary for the **Company**, **Person**, **Person in Company** and **Property** info areas, see [Company Match-up](#) on page 59, [Person Match-up](#) on page 61 and [Property Match-up \(BTB only\)](#) on page 63.

The **import database** (external database) must meet the following conditions:

- The external database and Aurea CRM database must be of the same database type (MS SQL or Oracle).
- For Oracle databases, the same character set (NLS_CHARACTERSET) must be used as in the Aurea CRM database. The character set used by the Aurea CRM database is specified in the `mmdb.ini` file using `MM_NLS_CHARSET`.
- MS SQL databases can use a different character set from the Aurea CRM database. In this case, enable the **Perform translation for character data** option in the ODBC connection. Aurea recommends that you exhaustively test the transformations applied to the character data.

Export to External Database

Before exporting to an external database, ensure that the following conditions are satisfied:

- The external database and Aurea CRM database must be of the same database type (MS SQL or Oracle).
- For Oracle databases, the same character set (**NLS_CHARACTERSET**) must be used as in the Aurea CRM database. The character set used by the Aurea CRM database is specified in the `mmdb.ini` file using **MM_NLS_CHARSET**.
- MS SQL databases can use a different character set from the Aurea CRM database. In this case, enable the **Perform translation for character data** option in the ODBC connection.

Note: Aurea recommends that you exhaustively test the transformations applied to the character data.

Import and Territory Management (BTB)

For information on the behavior of the **City, Allocation** and **Sales Territory Management** info areas, see [Territory Management](#) in the *BTB Business Logic Manual*.

Defining an Import/Export format

You need to define a format for the specific data you want to import or export.

The formats can be defined for importing from or exporting to files and databases. The required format is defined in the corresponding module, see [Defining an Import Format for an External File](#) on page 19, [Defining an Import Format for an External Database](#) on page 21 and [Defining an Export Format to an External File](#) on page 26.

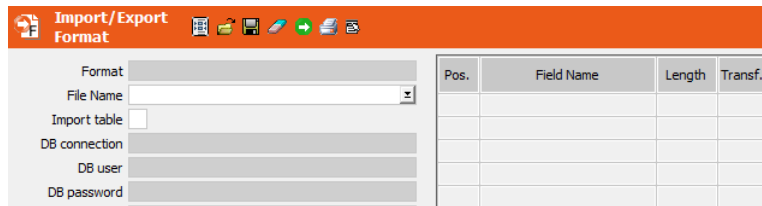
Note: A format defined for an external file can be used in the **Import** and **Export** modules, irrespective of where it is defined. A format defined for exporting to an external database can only be used for exporting to that database. Similarly, A format defined to import from an external database can only be used for importing from that database.

Defining an Import Format for an External File

Before you can import data, you need to replicate the structure of the import file in Aurea CRM as an import format.

To define an import format for an external file:


1. Start the Import module, see [Starting Modules](#) on page 13.





2. Select **File Name** from the context menu or double-click on the **File Name** drop-down list field.

Note: You can use the variables `$ InstallDir` and `$ UserDir` to refer to Aurea CRM's installation directory and user directory. If you do not enter a path, the file is searched for under `\system\db`. For information on the import file's requirements, see [Import File/Import Database](#).

3. Select **File Format** from the context menu to determine the import settings (separators, log files etc.), see [File Format](#) on page 36.
4. Select the import fields, see [Selecting Fields](#) on page 40.
The selected fields are listed in the **Field Name** column.
5. If you are using fixed field lengths, you need to enter the length of the external fields in the import format, see [Changing the Field Length](#) on page 43.
6. If you wish to transform the contents of fields during the import process, define the transformations, see [Transforming Field Contents](#) on page 43.
7. Select **Info Area Properties** and **Field Properties** from the context menu to determine how data is imported into Aurea CRM, see [Info area properties](#) on page 47 and [Field Properties](#) on page 51.
8. You can define conditions that records need to meet to be imported, see [Defining Import/Export Conditions on Records](#) on page 50. You can determine match-up conditions that have to be met by records in Aurea CRM to match up records, see [Match-up Conditions](#) on page 50.
9. Define or verify your match-up settings, see [Match-up](#) on page 58.
10. Select **Test Imp/ Exp** from the context menu to test the allocation of external fields to Aurea CRM fields and the results of transformations and case conversions (upper/lower), see [Testing the Import](#) on page 56. Import conditions, field links and match-up options are not tested.

-
11. To send an e-mail containing a status report or error message during/after the import process, select one or more of the following options:
- **E-mail Admin.:** E-mails are sent to the selected rep (provided an e-mail address is entered in either the **E-mail 1** or **E-mail 2** fields in the corresponding rep record). If you do not select a rep, the e-mails are sent to the current rep.
 - **E-mail (Start):** An e-mail is sent when the import begins.
 - **E-mail (Status in Min.):** Enter the interval (in minutes) in which e-mails should be sent containing status reports.
 - **E-mail (OK):** An e-mail is sent when the import is successfully completed.
 - **E-mail (Error):** An e-mail containing the error number is sent if an error occurs, see [Import/Export Error Codes](#) in the *CRM.core Administrator Guide*.
12. Click  (**Save**), see Saving, Loading and Deleting Formats in the *Aurea CRM win User Manual*.
-

Note: Click on  (**Load**) to load an existing format for editing. Click on  (**Delete**) to clear the current settings in the mask.

Defining an Import Format for an External Database

Learn to Define an Import Format for an External Database.

To define an import format for an external database:

1. Start the **Import** module, see [Starting Modules](#) on page 13.

Pos.	Field Name	Length	Transf.	Table column

2. Enable the **Import table** check box.
3. Enter the database connection settings in the following fields:
 - **DB connection:** Database connection (e.g. ODBC or Oracle)
 - **DB user** and **DB password:** Login details for the database
 - **DB name:** Name of the database

Note: This option has no function for Oracle databases.

Note: If you do not enter any details, the current Aurea CRM database is used.

4. **MS SQL only:** Alternatively, you can specify the database connection in the **Connection string** field. Use the following syntax:

```
Driver=SQL Server;Server=mmdm;Database=UPDATE7;UID=mm;PWD=MM;
```

or

```
Driver=SQL Server;Server=mmdm;Database=UPDATE7;Trusted_Connection=Yes;
```

Any installed ODBC driver can be specified as the driver, e.g. `Driver=SQL Server Native Client 11.0.`

Note: If **Connection string** is undefined, the values in **DB connection**, **DB user**, **DB password** and **DB name** are used.

5. Enter the name of the table in the **DB table** field (max. 64 characters).

Note: MS SQL: If the **DB connection** or **DB name** fields are left empty, enter the table using the following syntax:

```
[database].[schema].table
```

Oracle: Enter the name of the table in upper case. For information on the external database's requirements, see [Import File/Import Database](#).

When you leave the field (using either Enter or Tab), Aurea CRM verifies that it can access the external database.

6. Other optional settings:

- **Sort by index:** Select a unique index for the selected table.

Note: If you do not select an index, the first unique index in the table is used. If no unique indices exist, error codes cannot be output.

- **Error code column:** Column in the database to which error codes are written.

Note: Aurea recommends using a column of the type "int nullable" to store error codes. You can also use columns of the type string (char, nchar), with a minimum length of 32 characters and a recommended length of 64 characters. No other data types are supported.

Existing error codes are not deleted following a successful import.

For more information on error codes, see General Error Codes and Import/Export Error Codes in the *CRM.core Administrator Guide*.

- **SQL Where clause:** Enter the SQL code (the portion of the statement following "WHERE") to restrict the imported data using a condition. You can also use the command line parameter `-- sqlwhere`.

Note: External tables are imported with packet size = 32 by default. To change the import packet size, add a comment after the WHERE clause: `/*packetSize=500*/` changes the packet size to 500, `/*packetSize=-1*/` imports all data with one statement.

The maximum packet size is 1000. If there is not enough memory for this value, half of the requested value is used.

- **Only import rows without error codes:** Only applies to tables with a unique index. Rows that could not previously be imported and therefore contain an entry in the error code column are not imported.

Depending on the error code column's data type, an error code corresponds to the following:

- **type INT NULL (numeric):** If the import is successful, the NULL value is replaced by 0 (zero). Only records with a value of NULL in the error code column are interpreted as being without errors and imported.
- **type INT NOT NULL (numeric):** Only records with error code 0 are interpreted as being without errors and imported.
- **type NCHAR NULL (string):** If the import is successful, the NULL value is replaced by 0 (zero). Only records with a value of NULL, space character or empty in the error code column are interpreted as being without errors and imported.

- **Remove successfully imported rows:** Only applies to tables with a unique index. Successfully imported rows are deleted in the external database.

If the error code column is not empty before, the successfully imported rows are not deleted. To also delete successfully imported rows with an error code you can override this behavior with the **Delete error code column beforehand** option.

- **Clear field contents if DB value is NULL:** If a database value NULL is imported, the field becomes empty.
- **Clear field contents if DB value is 'null':** If a database string value 'null' is imported, the field becomes empty.
- **Ignore NULL values in DB:** The database value NULL is ignored during import, the field remains unchanged.
- **Ignore 'null' strings in DB:** The database string value 'null' is ignored during import, the field remains unchanged.
- **Ignore empty DB values:** The empty value is ignored during import, the field remains unchanged.

7. Select **File Format** from the context menu to define further settings, see [File Format](#) on page 36.

Note: The settings entered in the **Character Set, Field Length, Separator** and **Log Files** sections are ignored when importing data from an external database.


8. Select the import fields, see [Selecting Fields](#) on page 40.



The selected fields are listed in the **Field Name** column.

9. Click in the **Table Column** column to select the fields you wish to import from the external database.

-
10. You can adapt the length of fields in the import format to the length in the external database, see [Changing the Field Length](#) on page 43.
 11. If you wish to transform field contents when importing, define the transformations, see [Transforming Field Contents](#) on page 43.
 12. Select **Info area properties** and **Field Properties** from the context menu to configure the impact of the import on data in Aurea CRM, see [Info area properties](#) on page 47 and [Field Properties](#) on page 51.

Note: The log settings defined in the info area properties (**Log** columns) are ignored when importing from an external database. No logs are created.

13. You can define conditions that need to be met by records for the records to be imported, see [Defining Import/Export Conditions on Records](#) on page 50. You can define match-up conditions that need to be met by the Aurea CRM records for them to be matched up, see [Match-up Conditions](#) on page 50.
14. Define or verify the match-up settings, see [Match-up](#) on page 58.
15. Select **Test** from the context menu to test the mapping of external fields to internal fields and the effect of transformations and upper/lower case, see [Testing the Import](#) on page 56. Import conditions, links between fields and match-up options cannot be tested using this option.
16. To send e-mail containing a status report or error message during/after the import process, select one or more of the following options:
 - **E-mail Admin.:** E-mails are sent to the selected rep (provided an e-mail address is entered in either the **E-mail 1** or **E-mail 2** fields in the corresponding rep record). If you do not select a rep, the e-mails are sent to the current rep.
 - **E-mail (Start):** An e-mail is sent when the import begins.
 - **E-mail (Status in Min.):** Enter the interval (in minutes) in which e-mails should be sent containing status reports.
 - **E-mail (OK):** An e-mail is sent when the import is successfully completed.
 - **E-mail (Error):** An e-mail containing the error number is sent if an error occurs, see [Import/Export Error Codes](#) in the *CRM.core Administrator Guide*.
17. Click  (**Save**), see [Saving, Loading and Deleting Formats](#) in the *Aurea CRM win User Manual*.

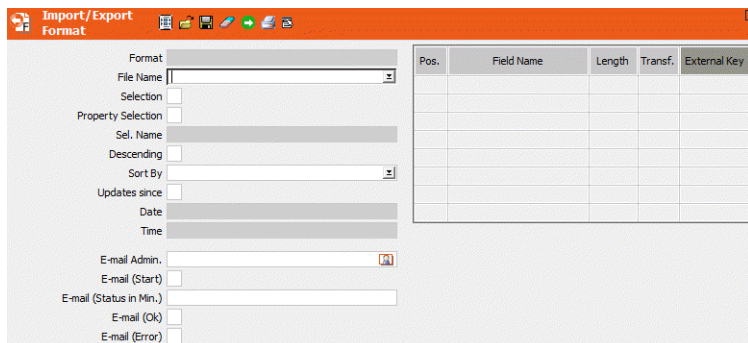
Note: Click on  (**Load**) to load an existing format for editing. Click on  (**Delete**) to clear the current settings in the mask.

Defining an Export Format to an External File

An export format defines the data and the format in which it is exported to a file.

To create an export format:

1. Start the **Export** module, see [Starting Modules](#) on page 13.



2. Either enter the path and name of the output file in the **File Name** field or click on the small arrow to the right of the field to select the desired file.

Note: If you do not enter a path, the file is output to the `\system\db` directory.

3. Select **File Format** from the context menu to define the format of the output file (separators, log file etc.), see [File Format](#) on page 36.
4. Select the fields to export, see [Selecting Fields](#) on page 40.
5. If you are using fixed field lengths, enter the corresponding field lengths in the table, see [Changing the Field Length](#) on page 43.
6. Enter any transformation to be applied to the selected fields, see [Transforming Field Contents](#) on page 43.
7. Enable the **Selection** check box to restrict the companies or persons exported to a specific selection instead of using the entire database. Click in the **Sel. Name** field to select a selection format, see [Selections](#) in the *CRM.win User Manual*.

Note: You can also select a property selection in the BTB version using the **Property Selection** check box.

8. You can also use conditions to restrict the data exported, see [Export Conditions](#) on page 55.
9. Select a field from the **Sort By** field to sort records in the first info area selected. By default, records are sorted in ascending order. Enable the **Descending** check box to sort in descending order.

-
10. **Updates since:** Use this option to log the output time and date in the export format. The next time you use this export format to export data, the log is used as a basis, and all data edited after the date and time entered in the **Date** and **Time** fields is exported.
 11. Enable the **External Key** column to export the external key instead of the contents of the field.

Note: When exporting rep fields, the external system entered in the **File Format** dialog box must correspond with the value entered in the **Ext. System** field in the rep record. The **External Key** column is disabled for rep ID fields. The external key can only be output for fields containing rep names (Z fields), see [Aurea CRM Field Types](#) in the *CRM.core Administrator Guide*.

12. Save the export format.

Note: Special Case - FS Vertical: If you export the **Activity, Support Intensity** and **Consultancy Items** info areas in this order, the export file contains all activity, support intensity and advice item records. If you change the order; for example, **Support Intensity, Advice Items, Activity**, then the result includes all the support intensity and advice item records, but no activities.

Defining an Export Format for an External Database

To export data to an external database you have to define a format and specify the data you want to export.

To export to external database, follow the below steps:

1. Start the Export module in one of the following ways:
 - From the **Start** menu
 - From other Aurea CRM win modules by selecting **Window > Modules** from the menu
 - From the command line, see [Aurea CRM Commands and Parameters](#) on page 343.

2. Select the **Export to DB** checkbox.
3. Enter the database connection settings as described below:

Any database:

- **DB connection:** Database connection (e.g. ODBC or Oracle)
- **DB user** and **DB password:** Login details for the database
- **DB name:** Name of the database

Note: This option has no function for Oracle databases.

Connection string (MSSQL Server only):

Alternatively, you can specify the database connection in the **Connection string** field. Use the following syntax:

```
Driver=SQL Server;Server=DBserverName;Database=DBname;UID=mm;PWD=MM;
```

or

```
Driver=SQL Server;Server=DBserverName;Database=DBname;Trusted_Connection=Yes;
```

Any installed ODBC driver can be specified as the driver, e.g. `Driver=SQL Server Native Client 11.0`.

Note: If **Connection string** is undefined, the values in **DB connection**, **DB user**, **DB password** and **DB name** are used.

4. Enter the name of the table in the **DB table** field (max. 64 characters).

Note: MS SQL: If the **DB connection** or **DB name** fields are left empty, enter the table using the following syntax:

```
[database].[schema].table
```

Oracle: Enter the name of the table in upper case.

For information on the external database requirements, see [Export to External Database](#).

When you exit the field, the connection details are verified to ensure that a connection can be established.

5. Provide the following optional details:

- **Sort by index:** Select a unique index for the specified table.

Note: If you do not select an index, the first unique index in the table is used. If no unique indices exist, error codes cannot be output.

- **Error code column:** Name of the Column created in the external database table to which error codes are written.

Note: Aurea recommends using a column of the type "int nullable" to store error codes. You can also use columns of the type string (char, nchar), with a minimum length of 32 characters and a recommended length of 64 characters. No other data types are supported.

Error codes generated during a previous export are not deleted.

For more information on error codes, see [General Error Codes](#) and [Import/Export Error Codes](#) in the *CRM.core Administrator Guide*.

- **Only Export rows without error code:** Select this checkbox to ensure that rows that could not previously be exported and contain error codes in the Error code column are ignored.

The type of the error code column determines the error codes rendered. The error codes for each column type and their interpretation are listed below:

- **type INT NULL (numeric):** If the export is successful, the NULL value is replaced by 0 (zero). Only records with a value of NULL in the error code column are interpreted as being without errors and exported.
- **type INT NOT NULL (numeric):** Only records with error code 0 are interpreted as being without errors and exported.
- **type NCHAR NULL (string):** If the export is successful, the NULL value is replaced by 0 (zero). Only records with a value of NULL, space character or empty in the error code column are interpreted as being without errors and exported.

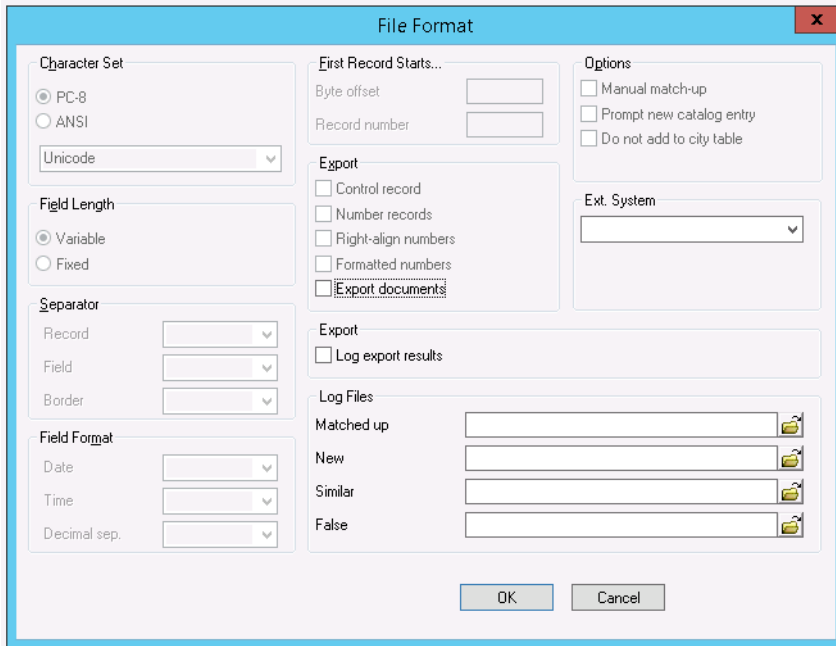
- **Remove successfully exported rows:** Successfully exported rows are deleted in the internal database. This works only if the table has a unique index.

If a successfully exported row contains an error code from a previous unsuccessful attempt then it is not deleted. To delete such rows select the **Delete error code column beforehand** option to ensure that the error code columns are cleared before the exported rows are considered for deletion.

- **Clear field contents if DB value is NULL:** If a database field with a value NULL is exported, the field in the exported table is rendered empty.
- **Clear field contents if DB value is 'null':** If a database field with a string value 'null' is exported, the field in the exported table is rendered empty.
- **Ignore NULL values in DB:** If a database field with a value NULL is exported, the field in the exported table is left unchanged.
- **Ignore 'null' strings in DB:** If a database field with a string value 'null' is exported, the field in the exported table is left unchanged.
- **Ignore empty DB values:** Any field with an empty value is ignored during export, the field in the exported database remains unchanged.

6. To configure some additional settings in the File Format window, perform the following:

- a. Select **File > File Format** .



b. You can configure the following options:

- **Export documents** (in the **Export** section): Documents in document records (**Document** and **Customer Document** info areas) are exported.

Note: Existing documents with the same name are overwritten if you repeat the export, and a warning is written to the log file.

- **Log export results:** Select this option to enable logging of the export results.
- **Log Files:** Log files contain records that are matched up, added, identified as similar or rejected by the export process, Logging is enabled in the info area properties (**Log*** options), see [Info area properties](#) on page 47.

Enter the path and name of the log files (e.g. C:\import\log.dat):

- **Matched up:** This log file contains records for which corresponding external records are found and which are merged (or would have been merged, if you do not have the right to update records).
- **New:** This log file contains all new records added by the export process.
- **Similar:** This log file contains those records for which similar (but not identical) records are found in the external database. These records are either not similar enough to be updated automatically, or more than one similar record is found.
- **False:** This log file contains those records that did not meet the export criteria (e.g. a mandatory field is missing, user access rights are

insufficient, import conditions are not met, supplementary information cannot be assigned to a company, etc).

Depending on the settings under **Info Area Properties**, the log files store the following information:

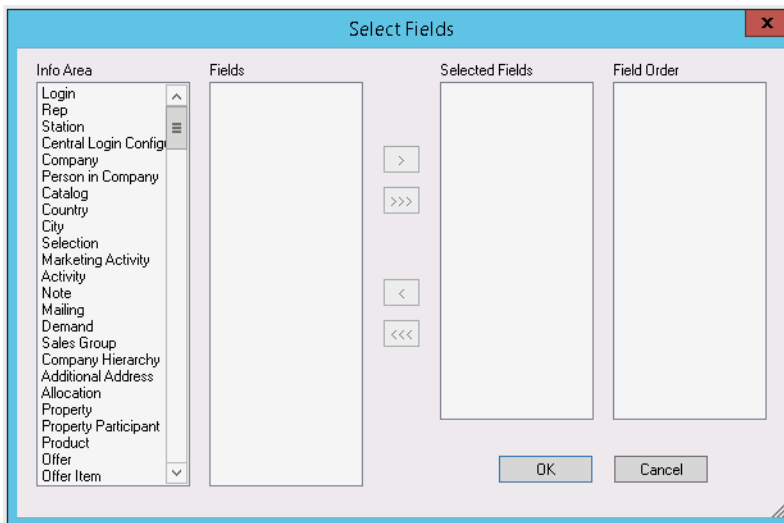
- Information on export processes that have been completed.
- Suggestions on how Aurea CRM would export individual records.

In this case, you can use the log file as the source for a further export with other settings. To preserve the log files, perform the following:

1. Copy the log file (as it might otherwise be overwritten by a new log file).
2. Import the copied file.

7. Select the fields you want to export, perform the following steps:

- a. Click  in the level header. The **Select Fields** dialog box displays.






- b. Select an info area under **Info Area**.

All the fields available in the info area are displayed under **Fields**.

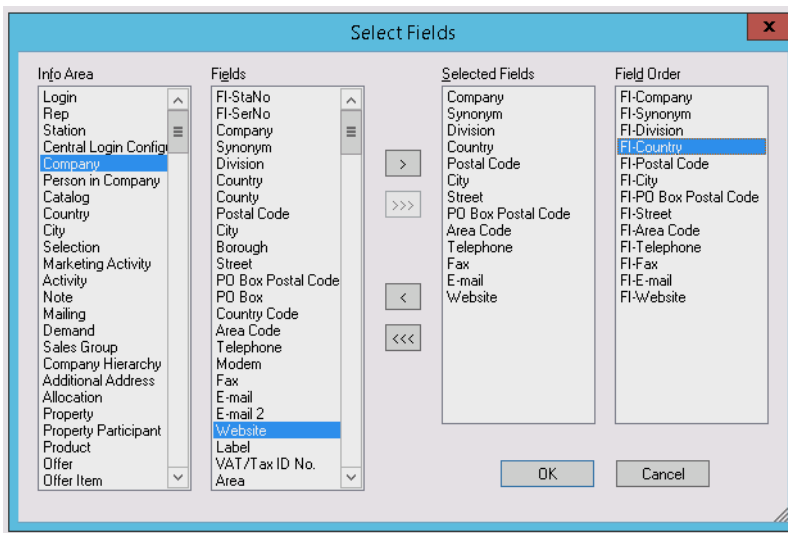
- c. Double-click on a field or select it and use the  button to select the field.

The field is displayed under **Selected Fields**.

- Use the  button to add all fields in the info area.
- Double-click on a field or select it and click on the  button to remove it from the list.
- Click on  to remove all fields from the list.

d. Continue until you have selected all the desired fields and info areas.

The fields you have selected are displayed under **Field Order** in the order you selected them. You can change the order, see [Changing the Field Order](#) on page 42.



e. Click **OK**. The fields are loaded to the table on the Export page.

Pos.	Field Name	Length	Transf.	External Key
0	FI-Company	120		
1	FI-Synonym	30		
2	FI-Division	40		
3	FI-Country	80		
4	FI-Postal Code	10		
5	FI-City	40		
6	FI-PO Box Postal Code	10		
7	FI-Street	100		
8	FI-Area Code	6		
9	FI-Telephone	40		
10	FI-Fax	40		
11	FI-E-mail	80		
12	FI-Website	60		

8. To change the length of a field, click on the **Length** column and enter the new value.

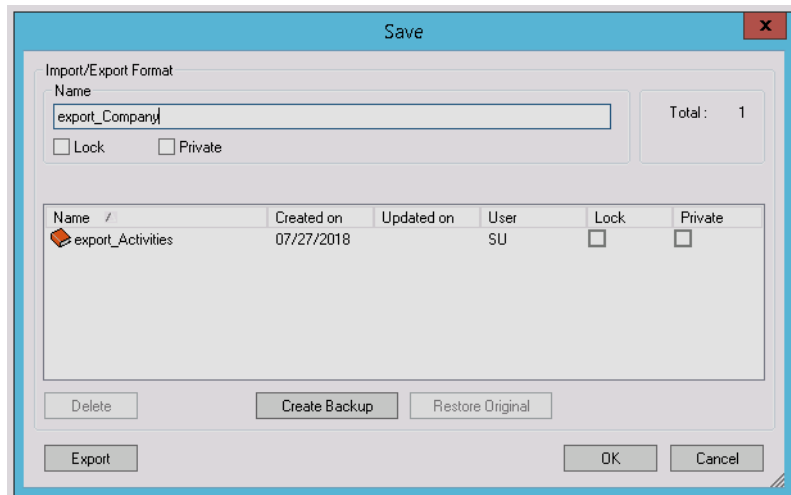
Note: If the field to export is longer than the field in the external database (e.g. **Company** field: 120 characters in Aurea CRM; 130 characters externally) enter the external length nonetheless. The characters that exceed the maximum field length are not exported.

9. To apply transformations on fields before exporting follow the steps described in [Transforming Field Contents](#) on page 43.
10. To define the conditions that apply before a record is exported follow the steps described in [Defining Import/Export Conditions on Records](#) on page 50.
11. To export records that have been deleted, select **Data > Export Deleted Records**



12.To send e-mail containing a status report or error message during/after the import process, select one or more of the following options:

- **E-mail Admin.:** E-mails are sent to the selected rep (provided an e-mail address is entered in either the **E-mail 1** or **E-mail 2** fields in the corresponding rep record). If you do not select a rep, the e-mails are sent to the current rep.
- **E-mail (Start):** An e-mail is sent when the import begins.
- **E-mail (Status in Min.):** Enter the interval (in minutes) in which e-mails should be sent containing status reports.
- **E-mail (OK):** An e-mail is sent when the import is successfully completed.
- **E-mail (Error):** An e-mail containing the error number is sent if an error occurs, see [Import/Export Error Codes](#) in the *CRM.core Administrator Guide*.

13.Click  (**Save**). The **Save** dialog box displays.



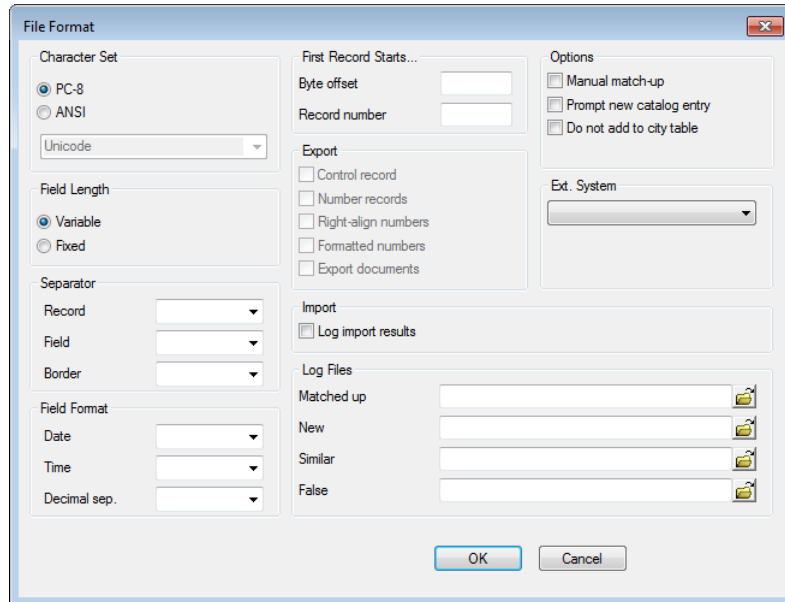
Enter a name for the format and click **OK**. The name is displayed in the **Format** field.

Note: Click on  (**Load**) to load an existing format for editing. Click on  (**Delete**) to clear the current settings in the mask.

For more information, see [Saving, Loading and Deleting Formats](#) in the *Aurea CRM win User Manual*.

File Format

Select **File Format** from the context menu or select **File > File Format** from the menu to determine the general settings used by the import/export process.



Character Set (only used when importing a file)

Character set used by the external file:

- **PC-8:** ASCII standard under DOS
- **ANSI:** Windows standard. Select the character set from the drop-down list (e.g. Unicode).

Field Length (only when importing/exporting a file)

- **Variable:** Field lengths in the file are variable. Fields are delimited using separators.
- **Fixed:** Each file in the import file has a fixed length.

Separator (only used when importing/exporting a file)

- **Record:** Separator used to delimit individual records in the file. You **must** specify the separator for records with variable field lengths. For records of fixed length the separator is optional.
- **Field:** Separator used to delimit individual fields in the file.
- **Border:** Fields in the file are surrounded by characters (e.g. an apostrophe in DBase files).

Default Separator Abbreviations in the drop-down lists: Cr (carriage return), Lf (line feed)

Note: You can use any character in the character set as a separator. Ensure that the separator cannot occur within a field. Pay special attention to the **Participants** field in the **Activity** info area. Participants are separated from one another in the field using a semicolon. If you export the contents of this field from Aurea CRM and then import it, do **not** use semicolons as separators.

Field Format

Format in the external file/database used for date, time or numeric fields:

- **Date:** The format used by date fields.

Aurea CRM uses the format DD/MM/YYYY. You only need to specify the format used externally if it differs from this.

- **Time:** The format used by time fields.

Aurea CRM uses the format HH:MM. You only need to specify the format used externally if it differs from this.

- **Decimal sep. :** The character used to separate decimal places.

If **Decimal sep.** is undefined, floating point numbers are imported incorrectly. If the integer and decimal places each take up a specific number of characters, you need to transform the data, see [Transforming Field Contents](#) on page 43.

You can also define the separator when exporting data. If you do not enter a separator, the separator entered in the user's regional settings is used.

First Record Starts...

- **Byte offset:** Enter the offset of the start of the first record. For example, if your file includes 40 characters of header data, enter "40".
- **Record number:** Enter the number of the first record that should be imported. The numbering of records starts with 0.

Export (Export module file only)

- **Control record:** The Aurea CRM field names are output at the start of the file.
- **Number records:** The records are numbered sequentially.
- **Right-align numbers:** Numbers are aligned to the right with leading spaces (default: left).
- **Formatted numbers:** Numbers are output using the current user's regional settings.
- **Export documents:** Documents in document records (**Document** and **Customer Document** info areas) are exported.
 - Path: export directory (containing the export file)
 - Document name: <info area abbreviation>_<StaNo>_<SerNo>_<title>
 - OLE documents and private documents belonging to other users are not exported. In this case, this is written to the log file, see [Logs and Error Messages](#) in the **CRM.core Administrator Guide**.

Note: Existing documents with the same name are overwritten if you repeat the export, and a warning is written to the log file.

Import (Import module only)

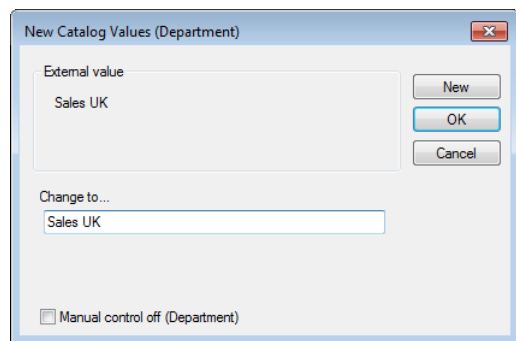
- **Log import results:** If enabled, import errors are logged in the **Import Results** info area (C5), see [Logging the Import/Export](#) on page 82.

Note: Creating **Import Results** records may affect the performance when importing large amounts of data.

For imports executed in Aurea CRM web the **Log import results** option is always enabled.

Options

- **Manual match-up:** Enable this option if you want to display and match up similar records already in the Aurea CRM database manually. You can decide whether to add the imported data as a new record or to merge it with an existing record, see [Executing the Import](#) on page 79.
- **Prompt new catalog entry:** Enable this option to be prompted when new catalog values are encountered. If new catalog values are encountered, these are compared to existing entries.



- The external catalog value is displayed. Enter the value that should be imported in the **Change to...** field.
- If you are using Aurea CRM in a language other than the catalog base language, you need to enter the value in the catalog base language (**Catalog Base Lang.** field) as well.
- Enable the **Manual control off** option to disable manual control for this catalog during the current import procedure.

- Click on the **New** button to add the catalog value (provided you have the necessary access rights).
- Click **OK**. A list of catalog values is displayed. Select a value to replace the value in the import file.
- **Do not add to city table:** Enable this option if cities entered in imported company records should **not** be added to the **City** info area in Aurea CRM if not yet present, see [City Info Area](#) in the *CRM.core Administrator Guide*.

Ext. System

Choose the external system from the drop-down list that should be used when importing reps, see [Field Properties](#) on page 51 and [Defining an Export Format to an External File](#) on page 26 (**External Key** column).

Log Files (Import module only, only used when importing a file)

Log files contain records that are matched up, added, identified as similar or rejected by the import process, see [Logging the Import/Export](#) on page 82. Logging is enabled in the info area properties (**Log*** options), see [Info area properties](#) on page 47.

Enter the path and name of the log files (e.g. C:\import\log.dat):

- **Matched up:** This log file contains records for which corresponding internal records are found and which are merged (or would have been merged, if you do not have the right to update records).
- **New:** This log file contains all new records added by the process.
- **Similar:** This log file contains those records for which similar (but not identical) records are found in Aurea CRM. These records are either not similar enough to be updated automatically, or more than one similar record is found.
- **False:** This log file contains those records that did not meet the import criteria (e.g. a mandatory field is missing, user access rights are insufficient, import conditions are not met, supplementary information cannot be assigned to a company etc.).

Note: If you do not enter a path, the log files are automatically written to the same directory as the import file. If you do not enter a file name, the name of the import file is used, with the following file extensions: *.abg (matched up), *.neu (new), *.sim (similar) and *.fal (false). You can also use variables to specify directories: \$InstallDir refers to the Aurea CRM installation directory \$UserDir refers to Aurea CRM's user directory

Depending on the settings under **Info Area Properties**, the log files store the following information:

- Information on processes that have been completed.
- Suggestions on how Aurea CRM would import individual records.

In this case, you can use the log file as the source for a further import with other settings:

1. Copy the log file (as it might otherwise be overwritten by a new log file).
2. Import the copied file.

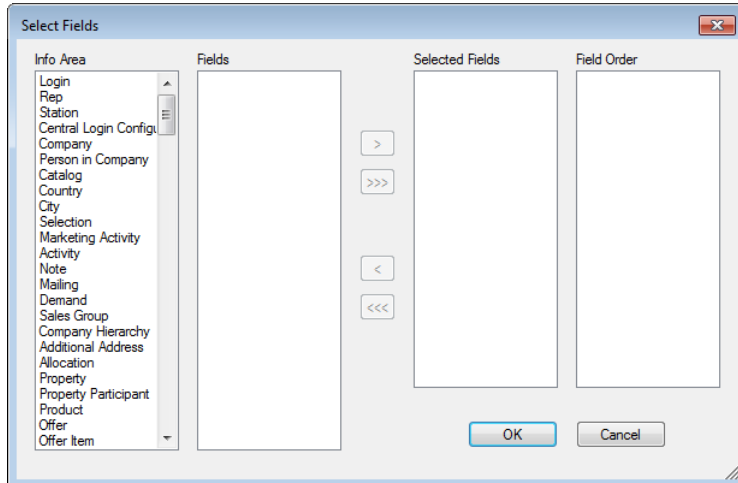
Selecting Fields

Learn how to select fields for import and export.

To select fields for the import or export:

1. Click on the  (**Fields**) button in the level header.

The **Select Fields** dialog box is displayed.






2. Select an info area under **Info Area**.

All the fields available in the info area are displayed under **Fields**.

3. Double-click on a field or select it and use the  button to select the field.

The field is displayed under **Selected Fields**.

- Use the  button to add all fields in the info area.
- Double-click on a field or select it and click on the  button to remove it from the list.
- Click on  to remove all fields from the list.

Note: If the external file for import contains fields that you do not wish to import into Aurea CRM, select the **Special Fields** entry from the **Info Area** list (the last entry in the list) and add the **Placeholder** field. You cannot apply conditions to placeholders.

4. Continue until you have selected all the desired fields and info areas.

The fields you have selected are displayed under **Field Order** in the order you selected them. You can change the order, see [Changing the Field Order](#) on page 42.

5. Click **OK**.

You can select the same field several times to write data from different fields in the import file into one field in Aurea CRM, see [Field Properties](#) on page 51. Fields that have been selected more than once are numbered (e.g. **FI-1-Street** if **FI-Street** is selected twice).

Catalog (KA)

To import language-dependent catalog values (**Catalog** info area), you also need to select the **Language No.** field, see [Catalog Info Area](#) in the *CRM.core Administrator Guide*. For further information on catalog values' external keys, see [Importing using External Keys](#) on page 76.

History (H0)

Records' histories are saved in a BLOB (Binary Large Object), see [History](#) in the *CRM.core Administrator Guide*. You can use the following virtual fields to output history records in XML reports or to export data in the history: **ID**, **Stat.No .**, **Date**, **Time**, **Rep ID**, **Rep**, **Windows User Name**, **Windows computer name**, **Version**, **Module**, **Field Number**, **Field Name**, **Old Value**, **New Value**, **Time Zone**.

Note: These fields are only available for XML reports and export purposes and otherwise have no function.

To export the history for deleted records:

1. Enable the **Archive History** option in the access rights, see [Enabling the History](#) in the *CRM.core Administrator Guide*.
2. Define an export format with the **History** info area as the first info area in the list, see [Info area properties](#) on page 47.

No history is displayed or output in reports for fields that the current user is unable to access due to their access rights.

You cannot import data into the **History** info area.

Item Master (AR) - BTB/OTC only

If available, **StatNo** + **SerNo** are used for matching up item master records during import. If these keys are not available, item master records can be matched up by **Item No.**

To import links to item master records you need to import their **Item No.** into the link's reference field, e.g. **AR_Link**. The linked item master record's primary key is automatically entered during import (**AR_StaNo** plus **AR_SerNo**).

Login (US)

Use the **Login** info area to import/export users and their module access rights. Also include the **Rep** info area in the import/export, and the **Group Allocation** info area as necessary. Reps are linked to users using the rep ID (**Rep/Group ID** in the Rep info area and **No.** in the **Login** info area).

Note: If you have enabled the **PW must contain upper and lower case** option in the **Station configuration** info area, you need to include the fields **Password** and **Encrypted Password** in the import/export format.

When importing US records, make sure the import user has access to the CRM process 1.5.2.2.1.6. "Manage Logins" (CRM process ID 70000310), see *Logins* in the [CRM.core Administrator Guide](#).

Participants

To import participants e.g. into activity (MA) records, use the following syntax:

```
<name>|<group>|<participation type>
```

Example

```
John Doe|Marketing|optional|Simon Seller|Sales|Required
```

You need to import this string into the text field **Participants** (MA:119).

Changing the Field Order

Learn how to change the field order.

To change the field order:

1. Click in the **Pos.** cell of the field you wish to reposition.
2. Enter the desired position and press Enter.

The fields are reordered.

Pos.	Field Name	Length
0	FI-Company	120
1	FI-Synonym	30
2	FI-Country	80
3	FI-Rep 1 ID	10

You can also change the field order using the mouse. Click the mouse button on the entry you wish to move, hold down the mouse button for a couple of seconds, and drag the field to the desired position.

Pos.	Field Name	Len
0	FI-Company	1
1	FI-Synonym	:
2	FI-Country	:
3	FI-Postal Code	:
4	FI-Gen. ID	:
5	FI-REVOC	:

Changing the Field Length

The length of the field is automatically displayed in the **Length** column after selecting a field.

If you are importing data with fixed field lengths, the length of the fields in the import format need to correspond exactly to the lengths in the import file. You can determine that only a certain number of characters are exported in your export format.

To change the length of a field:

1. Click in the **Length** column.
2. Enter the desired length.
3. Confirm your settings with either Tab or the cursor keys.

Note: If the external field for an import is longer than the field in Aurea CRM (e.g. **Company** field: 120 characters in Aurea CRM; 130 characters externally) enter the external length nonetheless. The characters that exceed the maximum field length are not imported. If you wish to import all characters into Aurea CRM, you need to import these characters into another field.

Transforming Field Contents

To edit field contents before importing/exporting the data, you can define one or more transformations per field.

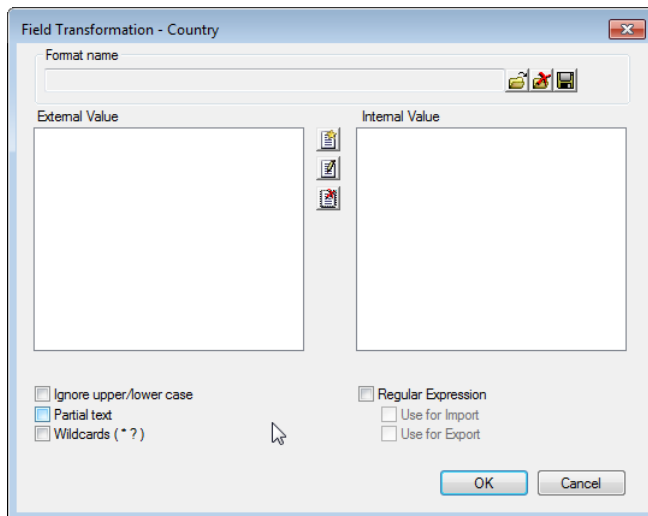
The following steps describe the transformation applied to field being imported from an external file or database. The same steps apply when transforming fields that are being exported to an external database. The transformations in this case is applied on the internal fields.

To define a transformation for a field:

1. Click in the **Transf.** cell.

Pos.	Field Name	Length	Transf.
0	FI-Ext. System	80	
1	FI-External Key	80	
2	FI-Company	120	
3	FI-Synonym	30	
4	FI-Country	80	✓
5	FI-Postal Code	10	

The **Field Transformation** dialog box opens.



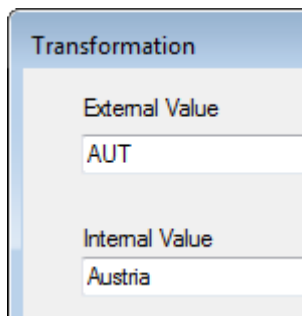
2. Click on  (**New**).

The **Transformation** dialog box opens.

3. Enter the field contents in the external file under **External Value**.

Note: You can use wildcards (see below) using the **Wildcards** option.

4. Enter the value to which the field contents should be transformed in the **Internal Value** field.



Note: To include a line break in internal value, use the code "\013\010" (\013 = CR, \010 = LF). Double-click in the **Internal Value** field for catalog fields to access the catalog entries.

5. Determine the following options:

- **Ignore upper/lower case:** Upper and lower case are ignored in the transformation.
- **Partial text:** The system also searches for and replaces substrings.
Example: The import file contains "& Co.". You wish to change this to "& Co" (without the final period). Enable the **Partial text** option and transform the external value "& Co." to the internal value "& Co".
- **Wildcards (* ?):** Use this option to replace values that can differ from record to record.

Note: Note: You can use literal character values of '*' and '?' using the escape sequences '*' and '\?'.

Example for *: The external file uses multiple abbreviations such as "Fr." and "Fra" that should be transformed into "France". Enable the **Wildcards** option and enter "Fr*" as the external value, and "France" as the internal value.

Example for ? : The external file contains values such "12A34", "57B75", "32A12". You only wish to import the last 2 digits. Enable the **Wildcards** option and enter "???" as the external value, and "*" as the internal value.

Transformations with ? text the text length exactly. If you wish to apply the transformation ?? -> ? to texts longer than two characters, you need to enable the **Partial text** option.

- **Regular Expression:** The external value contains a regular expression that described the pattern to be replaced. In an internal value is entered, the value is appended to the result of the evaluation of the regular expression. For more information on the syntax used by regular expressions, see [Regular Expressions Syntax](#) in the *CRM.core Administrator Guide*. An example can be found under [Regular Expressions in Transformations](#) on page 46.
 - **Use for Import/Export:** The regular expression is used when importing and exporting. If the check box is disabled, the line is ignored.
6. Enter all the desired transformations in this manner. The transformations are processed in the order they are displayed.

Note: The **Ignore upper / lower case**, **Partial text** and **Wildcards** settings are saved separately for each transformation in the list.

7. Save the format. You can use the same format for different fields.
8. Click **OK**.

Note: To define transformations that apply to all fields in the import file, select **Data > Global Transformation** from the menu.

Conditions are only tested after values have been transformed.

The values in the **Form of address** field must be transformed into the values used in Aurea CRM (Mr., Ms. and <empty>) to determine the title and greeting used in letters and labels.

Regular Expressions in Transformations

Learn how to use regular expressions in transformation.

In the following example, a rep's e-mail address (e.g. john.doe@example.com) is imported and the name of the rep is extracted from the e-mail address:

Pos.	Field Name	Length	Transf.
0	ID-First Name	20	✓
1	ID-Last Name	30	✓
2	ID-Name	80	✓
3	ID-E-mail	80	

Regular expressions for the transformation:

Field	External value	Duplicate previous field	Example results
First Name	s,[a-z]+	N	john
Last Name	s,[a-z]+,,,2	Y	doe
Name	t,([a-z]+)\.([a-z]+),'\$1 \$2',,,1,	Y	john doe
E-mail		Y	john.doe@example.com

Info area properties

Select **Info area properties** from the context menu or select **Data > Info Areas** from the menu to define if and how records are added to an info area.

Pos.	Info Area	Match	New	Upd	Delete	Manual Control	Log matches	Log new	Log similar	Log false	Match Options	Cond. Active	Match Active	Default Values	Package processing
0	Company														
1	Person in Compa														
2	Activity	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>				

- **Format:** The name of the saved format.
- **Pos.:** The order of the info area in the table, see [Match-up Order](#) on page 49.
- **Info Area:** The name of the info area into which data is imported.
- **Match:** Determines whether external data is matched up with internal data.

Company and person data can be matched up using a variety of methods (name, address, company or person number). Supplementary information is matched up using a fixed key.

If individual records are not matched up, they are added to the database if adding new records is permitted.

Further information can be found under [Match-up](#) on page 58.

- **New:** The external records are added to the Aurea CRM database as new records.
 - If new records are added without being matched up, external data is imported into the system without checking for duplicates.
 - Enable the **Match** cell to match up records before they are added to Aurea CRM.
- **Upd :** Data in Aurea CRM is updated by the import process.
- **Delete:** Enable this option to import records with external delete codes. If this option is disabled, records with delete codes set are not imported.
- **Manual Control:** Data is imported into this info area with or without manual control.
- **Log matches:** Creates a log file containing records identified as identical to records in the database.
- **Log new:** Creates a log file containing records that are added to the database.
- **Log similar:** Creates a log file containing records identified as similar (but not identical) to records in the database.

- **Log false:** Creates a log file containing records identified as false; i.e. records that are not imported.

Note: The log file always includes the entire record including all fields in the import file, even if one of the four **Log Files** options has only been enabled for a single info area.

You can specify paths for the log files, see [File Format](#) on page 36.

The log settings are ignored when importing from an external database. No log files are created.

- **Match Options:** Click in this cell to specify match-up options for companies and persons, see [Company Match-up](#) on page 59 and [Person Match-up](#) on page 61.
- **Cond. Active:** Select **Data > Define Condition** from the menu to define import conditions for individual info areas, see [Defining Import/Export Conditions on Records](#) on page 50.

Enable the **Cond. Active** cell to enable the conditions defined for an info area. Records in the import file need to meet these conditions in order to be imported. Otherwise the record is rejected as "false".

- **Match Active:** Select **Data > Define Match-Up Conditions** from the menu to define match-up conditions for individual info areas, see [Match-up Conditions](#) on page 50.

Enable the **Match Active** cell to enable the match-up conditions defined for an info area. Only those records that meet the conditions are matched up in Aurea CRM.

- **Default Values:** If fields in the import file are empty or not present, you can determine default values that are used instead, >> [Defining Default Values](#) on page 49. For example, if all the companies that you are importing are located in Germany, you do not need to specify the **Country** field in the import file, but can simply set the default value of **Country** to "Germany".
 - If the corresponding field in the import file is **empty**, the default value is entered instead (even if the field already contains a different value in the database).
 - If the corresponding field is **not present** in the import file, the default value is only entered if the record is added to the database as a new record. Existing fields in the database are unaffected in this case.

Note: If the import format is also used to export data, the default values are applied to fields that are exported, see [Export Conditions](#) on page 55.

- **Package Processing:** Records in the info area are imported in packages rather than individually. This can improve performance.

Note: Triggers are only executed after the entire package has been imported. To prevent unwanted results, ensure that no triggers or workflows are started that change or reference data in one of the info areas you are importing data into. However you can execute triggers that only affect the imported data without any side effects.

Package processing is not supported for the KP info area.

Package processing is not supported for imports using transactions.

Defining Default Values

Learn to define default values for info area properties.

1. Click in the **Default Values** cell or select **Data > Default Values** from the menu to define default values for an info area.

A list of all fields in the selected info area is displayed.

2. Enter the default values in the corresponding fields.
3. Save.

Match-up Order

The order of the fields in the import format determines the order in which info areas are matched up.

Pos.	Field Name
0	FI-Company
1	FI-Country
2	KP-Form of address
3	KP-First Name
4	KP-Last Name
5	MA-Type
6	MA-Starts on

Pos.	Info Area	Match	New	Upd	Delete
0	Company				
1	Person in Compa				
2	Activity				

If you wish to change the order of the info areas, enter the desired position in the **Pos.** column.

Pos.	Info Area	Match	New	Upd	Delete
0	Company				
1	Person in Compa				
2	Activity				

Defining Import/Export Conditions on Records

You can restrict the data imported to the internal database or exported to an external database using conditions.

Follow the below steps to define import/export conditions.

Note: While the steps to apply conditions on a record are the same, each format for import or export has its own set of conditions defined.

1. Select **Data > Define Conditions** from the menu.
2. Select the info area to which conditions should be applied.
3. Define the condition, see [Conditions](#) in the *CRM.Win User Manual*.

Note: Conditions can only be applied to fields that have been specified in the import format or those selected for export to an external database. You cannot apply conditions to placeholders.

If you have defined conditions that apply to catalog fields, the catalog values are added first, and then the condition is tested. If the record is refused, the database may therefore contain catalog values that are not used by any records.

Conditions are only applied after field contents have been transformed.

4. Select **Data > Activate Conditions** to activate the conditions for an info area.

Only those records that meet the conditions are imported to the internal database or exported to an external database. All other records are rejected as false.

Match-up Conditions

Match-up conditions can be used to restrict the volume of data that is matched up in Aurea CRM.

To use match-up condition, follow the below steps:

1. Select **Data > Define Match-Up Conditions** from the menu.
2. Select the info area to which the match-up conditions should apply.
3. Define the condition, see [Conditions](#) in the Win User Manual.

Note: The match-up conditions are ignored if the import format contains a unique key.

4. Select **Data > Activate Match-Up Conditions** to activate the match-up conditions for an info area.

Field Properties

Select **Field Properties** from the context menu to access a list of the selected fields.

Alternatively, select **Data > Field Properties**.

	Field Name	No Update	Update -> control	Update -> do not delete field	Update -> no defaults	Update -> append field	Update -> append spacing field	Link with prev. field	Link with prev. field + Space	Duplicate in other fields	Retain leading spaces	Reduce spaces to 1	First letter case	Duplicate previous field	External	Error -> Record false	Automatically add new catalogs
0	FI-Ext. System																
1	FI-External Key																
2	FI-Company																
3	FI-Country																
4	FI-Postal Code																

- **No Update:** Enable this cell if you do **not** want the internal field contents overwritten by the external value.
- **Update -> control:** Enable this cell to manually determine which contents to use if the external and internal field contents are different.
- **Update -> do not delete field:** Enable this cell if you do not want the internal field contents to be overwritten by an empty external value.
- **Update -> no defaults:** Enable this cell if you not want to replace empty fields with default values.
- **Update -> append field:** The internal field contents are not overwritten. The field data from the external file is appended to the internal value (without spaces). This takes place, irrespective of whether the two values are identical or not.
This option is generally used to import notes.
- **Update -> append spacing:** The internal field contents are not overwritten. The external value is appended to the internal value and separated by a space. This takes place, irrespective of whether the two values are identical or not.
This option is generally used to import notes.
- **Link with prev. field:** Enable this option if you wish to combine the contents of multiple external fields in a single internal field.
- **Link with prev. field + Space:** Same as **Link with prev. field**, except that a space is inserted between the two field contents.

Note: "Previous" refers to the previous identical field(s) selected. Use this to import data from several external fields and collate the values in a single internal field by selecting the same internal field for each of the external fields in the import format. By enabling one of these two options, field contents are combined and written to the same internal field. To include line breaks between field contents, use a transformation, see [Transforming Field Contents](#) on page 43.

Example:

External field name	Field name in import format	Link with prev. field (+ Space)	Contents
Street	FI-Street		Operngasse
Number	FI-1-Street	active	17-21

External field name	Field name in import format	Link with prev. field (+ Space)	Contents
Company	FI-Company		Aurea
Postal Code	FI-PostalCode		1040
City	FI-City		Vienna
Company 1	FI-1-Company	active	sales GmbH
Country	FI-Country		Austria
Company 2	FI-2-Company	active	Aurea software

- **Duplicate in other fields:** If several records are imported from one info area, a (key) field may only be output once, but you may still wish to use this data for other records.

Example: You import several activity records, all of which are entered on the same day, into one record. However, the date is only included in the first activity record. Enable this option to use the date for all following activity records that have no date entered.

- **Retain leading spaces:** Leading spaces are not removed by are retained as part of the imported field contents.
- **Reduce spaces to 1:** If spaces are present at the beginning of the field contents, these are reduced to a single space.
- **First letter caps:** Field contents written in upper case (e.g. UPDATE SALES) are written with an initial capital letter (e.g. Aurea Sales).

Note: Note that field contents, such as abbreviations, that are written in capitals is also converted (e.g. UNESCO -> Unesco).

- **Duplicate previous field:** Duplicates the previous field.

Example: The telephone numbers in the import file are in the format xxxx/xxx-xxx xxx. The number should be split amongst three fields (**Country Code**, **Area Code**, **Tel . 1**).

Check **Duplicate previous field** to copy the telephone number into these fields:

	Field Name	Duplicate previous field	External Ke	Error -> Record false	Automatic add new catalogs
0	FI-Ext. System				
1	FI-External Key				
2	FI-Telephone	[...]			
3	FI-Country Code	✓			
4	FI-Area Code	✓			
5	KP-Tel 1	✓			

Define transformations to strip the redundant information from each field, see [Transforming Field Contents](#) on page 43.

Field	External	Internal
FI-Country Code	*/*	*
FI-Area Code	*/*	/*
	/*_*	*
KP-Tel 1	*/*_*	/*_*
	/*_*	*_*
	_	_*
	_*	*

Result:

	Field Name	Duplicate previous field	External Ke	Error -> Record false	Automatic add new catalogs
0	FI-Ext. System				
1	FI-External Key				
2	FI-Telephone	[...]			
3	FI-Country Code	✓			
4	FI-Area Code	✓			
5	KP-Tel 1	✓			

- **External Key:** The **External Key** option is only available for rep and catalog fields.

You have the following options when importing rep fields:

- Importing into the rep ID field (e.g. **Rep 1 ID** in the **Company** info area) using the rep ID.
- Importing into the "normal" rep field using the **External Key** option.

To do so, select the external system (see [File Format](#) on page 36) and enable the **External Key** option for the rep field.

Example: You wish to import a company record containing a rep. The rep should be written to the **Rep 1** field in the **Company** info area. When creating the import format, enable the **External Key** option for the **Rep 1** field in the **Company** info area. Choose the corresponding external system in the **File Format** dialog box.

During the import process, the external key is searched for in the Aurea CRM database (**External Key** and **Ext. System** fields in the **Rep** info area). If a rep record is found containing the key, the corresponding rep is imported into the company record.

If you enable the **External Key** option for catalog fields, the import values are compared with variable catalogs' external keys and to fixed catalogs' internal codes. (By default, the value is compared to the text in the current language, or if no text is present, in the catalog base language.)

If no catalog value with the external key is found, the value is compared to the text in the current/base languages in a second step.

- **Error -> Record false:** This option is only available for variable catalog and rep fields.
 - **Catalog fields:**
 - **Error -> Record false** enabled: If a catalog value is not found in the Aurea CRM database and can not be created, the record containing the value is not imported but rejected as false.
 - disabled: If a catalog value is not found and can not be created, the record is imported with an empty catalog field.
 - **Rep fields:**
 - **Error -> Record false** enabled: If no corresponding rep record is found in the Aurea CRM database, the record referencing the rep is not imported but rejected as false.
 - disabled: If no corresponding rep record is found, the record is imported with an empty rep field.
- **Automatically add new catalogs:** This option is only available for variable catalog fields.

If this option is enabled, manual match-up is disabled for the corresponding field (>> [File Format](#) on page 36). Catalog values are added without being matched up manually if no matching value is found in the database.

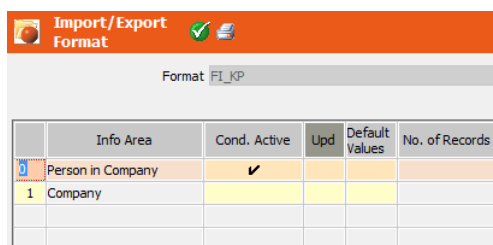
If the **External Key** option is also enabled, the catalog value is added as a text in the catalog base language and imported as an external key.

Export Conditions

Learn to define the conditions to be applied to exports.

To define conditions applied to the export:

1. Select **Data > Define Conditions** from the menu and define conditions applied to one of the info areas in your export format, see [Conditions](#) in the *CRM.Win User Manual*.
2. Select **Info areas** from the context menu.



	Info Area	Cond. Active	Upd	Default Values	No. of Records
0	Person in Company	✓			
1	Company				

3. Enable the **Cond. Active** cell for an info area to activate the conditions defined for that info area in step 1. Only those records that meet the conditions are exported.

Note: Alternatively you can select **Data > Activate Conditions** from the menu to activate the conditions.

4. The condition defined in the first row also affects subsequent rows.

Example: First row: **Person in Company** info area; condition "Department = Sales"; second row: **Company** info area, no condition. All persons with Department = Sales are exported, and all companies that contain such a person are exported.

To change the row order enter the desired row number in the left-most column. The rows are reordered accordingly.

5. To define that specific fields should be changed when exporting a record, enable the **Upd** cell for an info area and click in the **Default Values** cell to enter the desired field values. Changes to these fields may also initiate triggers.

Note: Defining default values can impact negatively on performance.

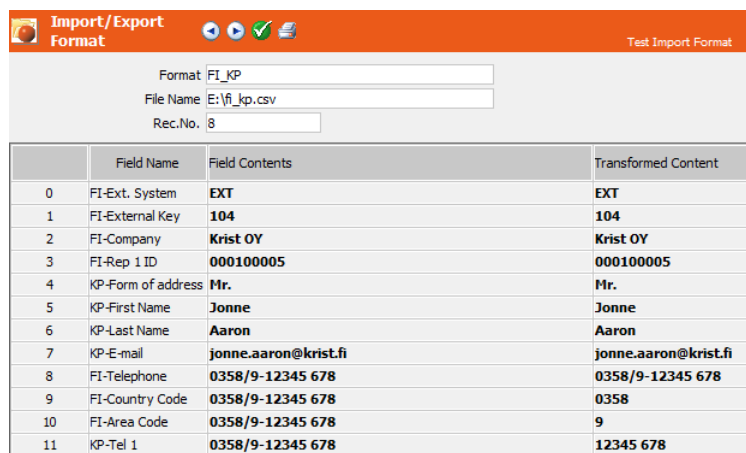
If the export format is also used to import data, the default values are applied to empty fields that are imported, >> [Info area properties](#) on page 47.

Testing the Import

Learn to test import settings.

To start a test import:

- Select **Test Imp/ Exp** from the context menu.
- Select **File > Test Imp/ Exp** from the menu.



	Field Name	Field Contents	Transformed Content
0	FI-Ext. System	EXT	EXT
1	FI-External Key	104	104
2	FI-Company	Krist OY	Krist OY
3	FI-Rep 1 ID	000100005	000100005
4	KP-Form of address	Mr.	Mr.
5	KP-First Name	Jonne	Jonne
6	KP-Last Name	Aaron	Aaron
7	KP-E-mail	jonne.aaron@krist.fi	jonne.aaron@krist.fi
8	FI-Telephone	0358/9-12345 678	0358/9-12345 678
9	FI-Country Code	0358/9-12345 678	0358
10	FI-Area Code	0358/9-12345 678	9
11	KP-Tel 1	0358/9-12345 678	12345 678

The following settings are tested:

- Field contents in the import file
- Field transformations
- Case conversions

The following settings are not tested:

- Conditions (and their results)
- Duplicate fields (fields selected several times and used to combine data in one internal field.
- Match-up options

Use the arrow buttons to navigate through all test results for the entire import file.

Numeric values that are not otherwise transformed are displayed using Aurea CRM's internal format. This makes it easier to spot errors caused by incorrect decimal symbols.

To change a transformation, click in the **Transformed Content** cell.

Exporting Fixed Catalog Values

Fixed catalog values are part of the data model and are stored as binary data in the database.

This prevents a direct export of fixed catalog values. To export them using the export module, you have to first populate the KX (Fixed Catalog (Export)) info area. Exporting the fixed catalog values after this follows the same steps as all infoareas.

To export the fixed catalog values, perform the following steps:

1. Run the following command from the command line shell:

```
mmba.exe --syncfixcattable
```

The KX (Fixed Catalog (Export)) info area is populated with the fixed catalog values for all languages.

2. Define the export format, see [Defining an Export Format to an External File](#) on page 26.
3. Execute the export, see [Executing the Export](#) on page 81.

Match-up

New records should not simply be added to Aurea CRM; they should first be compared to existing data in the database.

If an external record in the import file and an internal record in Aurea CRM are the same, you need to define how the data should be merged.

To determine the match-up options for companies and persons:

- Select **Data > Company Match-Up**, see [Company Match-up](#) on page 59.
- Select **Data > Person Match-Up**, see [Person Match-up](#) on page 61.
- Select **Data > Property Match-Up**, see [Property Match-up \(BTB only\)](#) on page 63.
- Select **Info area properties** from the context menu and click in the **Match Options** cell for the **Company**, **Person** or **Person in Company** info area.

Other info areas are matched up using fixed internal key fields, see [Match-up Logic for other Info Areas](#) on page 65.

You can also match up records using external keys, see [Importing with External Keys](#) on page 74.

Note: If conditions are applied to the import file (**Data > Define Conditions**), these are tested before data is matched up. If a record does not meet the conditions, it is rejected as false.

When matching up records using the primary key, a record is rejected if an existing record marked for deletion contains the same primary key. To import this record, you first need to complete the communication cycle so that the record is physically deleted from the database.

However, if you are not matching up records by primary key, a new record is added instead.

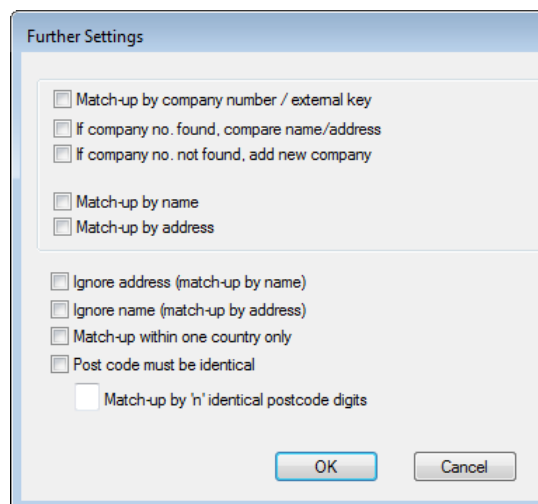
You can save the match-up settings as part of the import format.

For information on external match-up options, see [External Match-up](#) in the *CRM.core Administrator Guide*.

Company Match-up

Indices are used to match up similar companies in Aurea CRM.

There are three indices: Company number, name and address.



Enable at least one of the following check boxes to carry out the match-up procedure.

- **Match-up by company number / external key**

Note: Important: Companies and persons are best matched up using the primary key (company station and serial number). The company station number therefore also needs to be imported or set as a default value.

Use this option without any additional options, if the company number identifies the company record uniquely.

1. If Aurea CRM finds an internal and external record with identical customer numbers or external keys (>> [Importing with External Keys](#) on page 74), both companies are merged (even if the company names are not identical). Values in the external file overwrite internal values. If you have enabled the **Update -> Control** option for individual fields, you manually can determine whether to use the internal or external values for this field during the import process.

2. If no identical company number is found, companies are matched up using their name or address.

- **If company no. found, compare name/address**

This option is an extension of the **Match-up by company number / external key** option. Use these options together if the company numbers in the import file are not unique.

In this case, the system should not merge records with identical company numbers, but should match records up by name and address as well. You can then either decide manually how data should be treated or output the data to a log file.

- **If company no. not found, add new company**

This option is an extension of the **Match-up by company number / external key** option. Use both options if all company numbers are unique, and you can safely assume that a company is not stored in Aurea CRM if the company number is not found.

If no identical company number is found, the record is added to the database without being matched up further.

- **Match-up by name:**

Companies are matched up using the company name:

1. Only if the first 40 characters in the company name are identical or phonetically similar, is the company matched up any further. If not, the record is refused as false.
2. If the name of a company is found in the database, the system compares the addresses.
3. If both the company name and the address are similar, both records are recommended for merging.

- **Match-up by address:**

Companies are matched up using the company address:

1. The **Country, Postal Code** and **City** are compared, followed by the **Street**. If the two addresses are identical or phonetically similar, the search is continued.
2. The system checks whether the companies have a similar company number.
3. If both the company name and the address are similar, both records are recommended for merging.

Note: To increase the performance for large volumes of data, Aurea recommends only using the **Match-up by address** option, as the system only lists companies with similar addresses (identical **Country, Postal Code, City** and **Street**) and does not compare the company name and address phonetically.

- To match up the company by name only, without taking the address into account, enable the **Match-up by name** and **Ignore address (match-up by name)** options.

Companies are returned if the first 40 characters of the company name are identical. This results in more companies being returned (e.g. Aurea sales AG in both Germany and Austria), however, other similar companies might not be returned (e.g. Aurea software AG and Aurea sales GmbH, both at the same address).

-
- To only match up companies by address without taking the company name into account, enable the **Match-up by address** and **Ignore name (match-up by address)** options.

Companies at the same or a similar address are returned, even if their names differ.

Note: Using the Ignore-options (**Match-up by name + Ignore address / Match-up by address + Ignore name**) is only supported when importing with manual confirmation, i.e. if the **Manual match-up** option is enabled, see [File Format](#) on page 36. Automatic match-up would lead to unwanted results.

- **Match-up within one country only:** Match-up according to addresses can be further restricted using this option. Only companies in the same country are matched up.
- **Post code must be identical:** Match-up according to addresses can be further restricted using this option. Only companies with the same postcode are matched up.
- **Match-up by 'n' identical postcode digits:** Company records are matched up according to a specific number of identical postcode digits. If you do not enter a value, the value entered in the **Match Lgth** . Field in the in the **Country** info area in the **Maintenance** module is used (default: 3).

Person Match-up

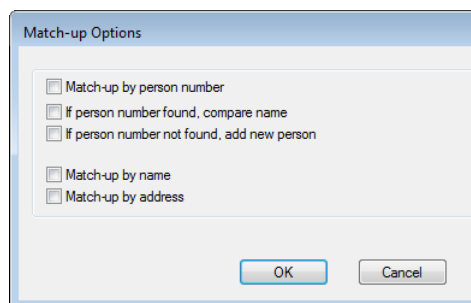
Learn about the person match up steps.

Persons (KP and PE) are matched up in 3 steps:

1. A person is allocated to a company (KP only).
2. The system checks whether the person already exists.
3. If so, the records are merged. If not, the person is added as a new record.

If you have not determined any match-up criteria for persons, persons are matched up (within the company) by last name, first name, form of address and address.

Note: If you import KP records with their primary keys (**KP- StaNo** plus **KP- SerNo**), the records are matched-up by this key irrespective of the selected match-up options. If person numbers in the database are not unique, you may need to import **PE_StaNo** or define a default value for it.



- **Match up by person number:**

Only use this option if person numbers are unique.

If Aurea CRM finds a person with an identical person number (**PE_SerNo**), both records are automatically merged (even if the surname is different). Values in the external file overwrite internal values. If you have enabled the **Update -> Control** option for individual fields, you can determine whether to use the internal or external values for this field during the import process.

If the person number is not found, Aurea CRM automatically matches up the person (within the company) using the surname. When importing manually, you can decide whether a new record should be added, the data should be merged, or identified as similar. You can use the log files generated by the process as a basis for further imports. This option is especially useful for processing the data rejected by an automatic import.

- **If person number found, compare name:**

This option is an extension of the **Match-up by person number** option. Use these options together, if the person numbers in the import file are not unique.

The system compares the names of the persons with identical person numbers, instead of merging them immediately. If the system cannot find the person number, the person is matched up using surnames (within the company). If you are importing manually, you can decide how to proceed. You can use the log files generated by the process as a basis for further imports. This option is especially useful for processing the data rejected by an automatic import.

- **If person number not found, add new person:**

This option is an extension of the **Match-up by person number** option. Use these options together, if the person numbers in the import file are not unique.

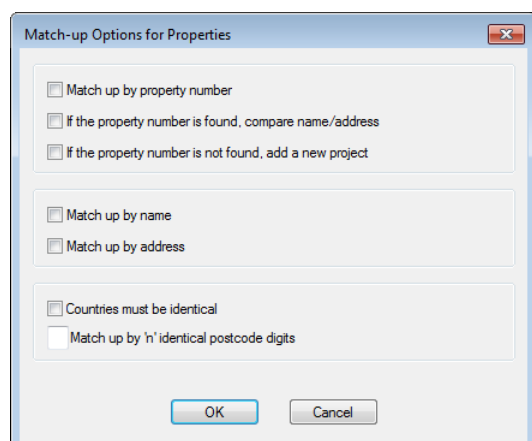
If no identical person number is found, the person is added to the database without being matched up further.

- **Match-up by name:** The person is matched up using the surname with all persons in the database.
- **Match-up by address:** The person is matched up using the address with all persons in the database.

Note: To manually match up data by name and address, enable the **Manual Control** column in the info area properties. If this option is not active, you can enable the **Log similar** option to determine that all persons identified as being similar are written to a log file. If this option is not enabled, similar persons are added to the system without prompting. For more information on these options, see [Info area properties](#) on page 47.

Property Match-up (BTB only)

The unique property key is composed of the station number and property number, and is automatically assigned by the system.



You need to select at least one of the following options when matching up properties: **Match up by property number**, **Match up by name**, **Match up by address**.

Match-up by property number

The system searches for similar properties based on the property number in the import file and either using the station number defined in the import file or the default value.

Only use this option if property numbers are unique.

1. If Aurea CRM finds records with an identical property number, the external and internal records are merged (even if the property name is not identical). Values in the external file overwrite internal values. If you have enabled the **Update** ->

Control option for individual fields, you can determine whether to use the internal or external values for this field during the import process.

2. If the property number is not found, the system continues matching up the property, this time by name and address.
 - If you have additionally enabled the option **If the property number is found, compare name/address**, Aurea CRM does not merge records if the property numbers are identical, but matches up the property using the name and address as well. Use this option if property numbers in the import file are not unique.
 - If you additionally enable the option **If the property number not found, add a new project**, Aurea CRM adds external records to the database without matching them up further if no identical property number is found.

Match-Up By Name

Properties are matched up by name.

1. Only if the first 20 characters of the property name are identical, is the property matched up further. The system tests whether the two names correspond by more than 50%. If not, the record is refused as false.
2. If the name of a property is found in the database, the system compares the addresses.
3. If both the property name and the address are similar, both records are recommended for merging.

Match-up by address:

Properties are matched up by address.

1. The **Country, Postal Code** and **City** are compared, followed by the **Street**. If the two addresses are identical, the search is continued.
2. Properties are then matched up using the name: If no similar record is found, then the record to be imported is either rejected as "false" or added as a new record.
3. If both the property name and the address are similar, both records are recommended for merging.

Note: To increase the performance for large volumes of data, Aurea recommends only using the **Match up by address** option, as the system only lists properties with similar addresses (identical **Country, Postal Code, City** and **Street**) and does not compare the property name and address phonetically.

Match-up within one country only: Match-up according to addresses can be further restricted using this option. Only properties in the same country are taken into account.

Match-up by 'n' identical postcode digits: Property records are matched up according to a specific number of identical postcode digits. If you do not enter a value, the value entered in the **Match Lgth** . Field in the in the **Country** info area in the **Maintenance** module is used (default: 3).

Note: You can also import objects using keys from external systems, see [Importing with External Keys](#) on page 74.

Match-up Logic for other Info Areas

Learn how data from one infp area is matched with data in other info area.

Other data from other info areas is also matched up, see [Match-up Rules for Dependent Info Areas](#).

The system first attempts to match up records using the primary key. If the primary key is not included in the imported record, there are three options:

- Data in certain info areas is matched up using specific indices, see [Match-up using Specific Indices](#).
- For certain info areas there are also specific match-up functions, see [Info Areas with Specific Match-up Logic](#) on page 68.
- Data in other info areas is matched up using the indices, one after another. The order of the indices can be found in the data model, see [Index](#) in the *CRM.core Administrator Guide*.

If no duplicate records are found in this manner, the imported record is added to the database as a new record.

Match-up Rules for Dependent Info Areas

When importing supplementary information, information needs to be provided with which the external data can be linked to companies and/or persons already in the Aurea CRM database. If the supplementary information is person-related, you need information on both the company and the person. If the information is company-related, you only need information on the company.

- If new data should be added to dependent info areas when importing, this data should either be matched up with data in the parent info area (with data in the dependent info areas being added as new records) or the parent record must first be added as a new record.
- If data is matched up in one info area, data in parent info areas is not updated. All info areas that receive imported data need to be matched up separately using a suitable match-up key.
- Some import keys are not tested by Aurea CRM to verify that they are unique. If several records with the same key are stored in the system, the first record that is found is used to match up the external data. In this case, the external system needs to guarantee that keys are unique (e.g. **Head Ext.Key** in the **Order** info area)

- If a match-up key does not contain the key of the parent info area, but the key has been defined in the import file, the external system needs to guarantee that these keys match. Otherwise the record is imported incorrectly; e.g. an order by company X is assigned to company Y after importing.
- If an info area is rejected as false in a match-up line, all subsequent dependent info areas are rejected as false in this line.
- Data for several info areas can be imported in one line in the import file. If the data in one info area is identical to the data in the line immediately above, the info area is automatically recognized as identical to the one in the line above, and is not displayed in the communication log file, irrespective of whether match-up is activated for this info area. If even a single field differs, the data is treated as a new record.
- If all of the fields in a line relating to a record are empty, the record is not included in the log file. Subsequent records in this line cannot be matched up via this record.

Match-up using Specific Indices

The following info areas are first matched up using the primary key. If the serial number used to form the primary key is not included in the imported record, the record is matched up using a specific index. If this index is not unique (`[DUPLICATE]` in the **Properties** column in the data model), the first record that is found containing the same index values is used to match up the imported record.

All indices for all info areas can be found in the data model, see [Index](#) in the *CRM.core Administrator Guide*. You can output all indices to a file using the `-m` or `--writexmldef` parameters, see [mmba.exe Parameters](#) in the *CRM.core Administrator Guide*.

Info Area	ID	Vertical	Index No.
Account	KT	FS	4
Account Manager	SB	OTC	1
Allocation	ZU	OTC	1
Asset Values	VW	FS	6
Bank A/C Details	BV	FS	3
Building Society Savings	BS	FS	4
Conditions	KD	BTB	1
Conditions	KD	OTC	2
Contract	VV	FS	1

Info Area	ID	Vertical	Index No.
Credit Control	KK	BTB	1
Demand	BF	BTB/FS/OTC	1
Expenses	B2	BTB/FS/OTC	2
Info1	X1	BTB/FS/OTC	3
Info2	X2	BTB/FS/OTC	3
Info3	X3	BTB/FS/OTC	3
Interest	IT	BTB/FS/OTC	1
Item Master	AR	BTB/OTC	1
Listing	LS	OTC	1
Loan	KR	FS	4
MV Insurance	KV	FS	4
Personal Insurance	VS	FS	4
Product Master	PS	FS	1
Product Mix	PM	FS	1
Property Insurance	NV	FS	4
Property Note	ON	BTB	1
Property Participant	OB	BTB	2
Refunding	VG	OTC	3
Rep	ID	BTB/FS/OTC	4
Revenue Statistics	SU	FS	1
Sales Area (Company)	VF	BTB/OTC	1

Info Area	ID	Vertical	Index No.
Sales Area (Item)	VA	BTB/OTC	1
Sales Group	SB	BTB/FS	1
Sales Sector	VB	BTB/OTC	2
SAP Company Code	BK	BTB	1
Securities Account	AL	FS	4
Security Title	WT	FS	4
Service	DI	FS	4
Special Offer	AT	OTC	1
Specialization	SP	BTB	1

Info Areas with Specific Match-up Logic

This topic has the list of info areas with specific match-up logic.

If the primary key is not included in the imported record, records in the following info areas are matched up as follows:

Activity/MA

All unique indices are tested in order.

If the system is unable to match up the data in this manner:

- Index 1 is used (**FI_StaNo** , **FI_SerNo** , **KP_StaNo** , **KP_SerNo** , **Starts on**, **Starts at**).
- If the **Type**, **AK_StaNo** and **AK_SerNo** match, the rep is also tested. If the rep is identical or empty in the imported record, the record is used to match up the imported data.

Additional Address/ZA (BTB only)

- Index 4 is used to match up data (**Ext. System**, **Ext.Key**).
- If **Ext. System** and **Ext.Key** are empty, index 1 is used to match up the data (**FI_StaNo**, **FI_SerNo**, **PE_StaNo**, **PE_SerNo**, **Address Type**, **OJ_StaNo**, **OJ_SerNo**).

Additional Address/ZA (FS and OTC)

- Index 3 is used to match up data (**Ext. System**, **Ext.Key**).
- If **Ext. System** and **Ext.Key** are empty, index 1 is used to match up the data ((**FI_StaNo**, **FI_SerNo**, **PE_StaNo**, **PE_SerNo**, **Address Type**).

Bank Code/BL (FS Only)

If the **Country** and **Postal Code** are included, index 1 is used (**Bank Code**)

The following fields in the imported sort code record must correspond identically to the data in the database:

- **Bank Code** and **Country**
- **Branch No.**, if the **Branch No.** is imported.
- **Branch**, if the **Branch** is imported and the **Branch No.** is not imported.
- Both **Branch** and **Branch No.** must be empty if neither is imported.

Company Hierarchy/FB (BTB only)

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

Competition Item/KU (OTC only)

- The system attempts to match up the record using the **KK_StaNo** and **KK_SerNo** fields in the parent info area and using the **Comp. Item No.** field.

Installed Base/IB (BTB Only)

- The system attempts to match up using the **Ext. Key Header** (index 7), if the external key is imported.
- If it is not possible to match up using the external key, and the **Host No.** is imported, index 4 is used (**Host No.**).
- If the **FI_StaNo** and **FI_SerNo** are identical, the record is matched up.

Note: By default, records are matched up using the **Host No.** across the entire database. You can restrict this to only match up records within the same company using a configuration entry (MC), see [Import](#) in the *CRM.core Administrator Guide*.

Installed Base/IB (OTC Only)

- The system attempts to match up using the **Ext. Key Header** (index 5), if the external key is imported.

Installed Base Item/KO (BTB Only)

- The system attempts to match up using the **Ext. Key Header** (index 3), if the external key is imported.
- If the system is unable to match up the record using the external key, the record is matched up using the **IB_StaNo** and **IB_SerNo** in the parent record and using the **SerNo** field.

Inst. Base Item/IP (OTC only)

- The system attempts to match up using the **Ext. Key Header** (index 5), if the external key is imported.
- The system attempts to match up the record using the **IB_StaNo** and **IB_SerNo** fields in the parent info area and using the **Inst. Base- PosNr** . field. The first record found is used to match up the imported data.

Mailing/BR

All unique indices are tested in order.

- If the system cannot match the data up in this manner, index 1 is used (**FI_StaNo** , **FI_SerNo** , **PE_StaNo** , **PE_SerNo** , **Date**).
- If **AK_StaNo** and **AK_SerNo** match, the record is used to match up the imported data.

Marketing Activity/AK

- If the **Key** field contains data, match up using index 4 (**Key**).
- If **Key** is empty, match up using index 3 (**Marketing Activity**, **Level**, **Variant**, **Starts on**).

Note/NO

All unique indices are tested in order.

- If the system cannot match up the data in this manner, index 1 is used (**FI_StaNo** , **FI_SerNo** , **KP_StaNo** , **KP_SerNo** , **Date**, **Rep ID**, **Note Type**).
- If the data in index 3 (generic link) is identical or not imported, the record is matched up.

Offer/PR (BTB only)

- The system attempts to match up using the **Ext. Key Header** (index 8), if the external key is imported.
- If it is not possible to match up using the external key, and the **PR- SerNo** is imported, index 4 is used **FI_StaNo , FI_SerNo , Y2_PE_StaNo, Y2_PE_SerNo, Offer No.**).
- The first record found is used to match up the imported data.

Offer/PR (OTC only)

- The system attempts to match up using the **Ext. Key Header** (index 5), if the external key is imported.
- If it is not possible to match up using the external key, index 3 (**Host No.**) is used instead.

Offer Item/AP (BTB only)

- The system attempts to match up using the **Ext. Key Header** (index 4), if the external key is imported.
- If the system is unable to match up the record using the external key, the record is matched up using the **PR_StaNo** and **PR_SerNo** in the parent record and using the **Item** field.

Offer Item/AP (OTC only)

- The system attempts to match up using the **Ext. Key Header** (index 3), if the external key is imported.

Offer Item Partial Delivery/AL (BTB Only)

- The system attempts to match up the record using the **AP_StaNo** and **AP_SerNo** fields in the parent info area and using the **Distribution No.** field. The first record found is used to match up the imported data.

Order/AU (BTB only)

- The system attempts to match up using the **Ext. Key Header** (index 5), if the external key is imported.
- If this is not possible to match up using the **Ext. Key Header** and the **Order No.** is imported, all orders with the same **FI_StaNo** and **FI_SerNo** are read. The first record found with the same **Order No.** is then used to match up the imported data.

Order/AU (OTC only)

- The system attempts to match up using the **Ext. Key Header** (index 6), if the external key is imported.
- If it is not possible to match up using the external key, index 3 (**Host No.**) is used instead.

Order Comment/UN (OTC only)

- The system attempts to match up the record using the **AU_StaNo** and **AU_SerNo** fields with the parent info area and using the **Number** field. The first record found is used to match up the imported data.

Order Item/UP (BTB only)

- The system attempts to match up using the **Ext. Key Header** (index 2), if the external key is imported.
- If the system is unable to match up the record using the external key, the record is matched up using the **AU_StaNo** and **AU_SerNo** in the parent record and using the **Item** field. The first record found is used to match up the imported data.

Order Item/UP (OTC only)

- The system attempts to match up using the **Ext. Key Header** (index 3), if the external key is imported.
- If the system is unable to match up the record using the external key, the record is matched up using the **AU_StaNo** and **AU_SerNo** in the parent record and using the **Order Item No.** field.

Participant/RO (BTB only)

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

Participant/PA (OTC only)

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

POS Monitoring Item/PP (OTC Only)

- The system attempts to match up the record using the **PS_StaNo** and **PS_SerNo** fields in the parent info area and using the **POS Item No.** field. The first record found is used to match up the imported data.

Product/OP (BTB Only)

- The system attempts to match up the record using the **OJ_StaNo** and **OJ_SerNo** fields from the parent info area and using the **Ser No.** field. The first record found is used to match up the imported data.
- The system searches for products with the same **OJ_StaNo** , **OJ_SerNo** , **Product Group** and **Ser No.** The first record found is used to match up the imported data.

Product Detailing Definition Item/SP (OTC Only)

- The system attempts to match up the record using the **SR_StaNo** and **SR_SerNo** fields in the parent info area and using the **Line No.** field. The first record found is used to match up the imported data.

Receipt/B4 (BTB Only)

- The system attempts to match up the record using the **B2_StaNo** and **B2_SerNo** fields from the parent info area and using the **Receipt No.** field. The first record found is used to match up the imported data.

Receipt/B4 (OTC Only)

- The system attempts to match up the record using the **B2_StaNo** and **B2_SerNo** fields from the parent info area and using the **Expenses Item No.** field. The first record found is used to match up the imported data.

Refunding Item/VP (OTC only)

- The system attempts to match up the record using the **VG_StaNo** and **VG_SerNo** fields with the parent info area and using the **Refunding Item No.** field. The first record found is used to match up the imported data.

Relationship/PB

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

Role/RL (FS Only)

- If the **Prod.Ser.No** . is entered, index 1 is used to match up data.
- If the **Prod.Ser.No** . is empty and the **Prod.No** . is entered, the first record found with identical **FI_StaNo**, **FI_SerNo**, **PE_StaNo**, **PE_SerNo**, **Role**, **Link to Info Area** and **Prod.No** . is used to match up the data.

Sales Area (Partner)/VP (BTB Only)

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

Sales Area (Partner)/VE (OTC Only)

- The system attempts to complete index 1 using the external key.
- Then index 1 is used to match up the data.

Special Offer Item/AA (OTC only)

- Records are matched up using the **AT_StaNo** and **AT_SerNo** fields in the parent record and using the **Special offer item no.** field.

Stock Control Item/BP (OTC only)

- The system attempts to match up the record using the **BV_StaNo** and **BV_SerNo** fields in the parent info area and using the **Stock Cont. Item No.** field. The first record found is used to match up the imported data.

Importing with External Keys

Learn how to communicate and import using external keys.

The following fields are used by Aurea CRM as unique fields for communication and importing:

- FI_StaNo** and **FI_SerNo** for companies
- PE_StaNo** and **PE_SerNo** for persons
- OJ_StaNo** and **OJ_SerNo** for properties (BTB only)

You can store additional "external" keys for companies, persons or properties in Aurea CRM that are used by external systems (e.g. accounting, mainframe) and use them as match-up criteria when importing data. The external key needs to be included in the import file to be able to identify the record. Any number of external keys can be assigned to each record.

You can define external key fields for other info areas in the data model (field type "ext.key"), see [Aurea CRM Field Types](#) in the *CRM.core Administrator Guide*.

Example: A company is maintained externally on 3 systems:

Company	System	Company number
European Inc.	AS 400	12
European Inc.	Accounting	511
European Inc.	Addresses	1100

The **Ext. Company Key** (XF) info area is used to match up the company imported data from the different systems with the company in Aurea CRM.

Company	FI_StaNo	FI_SerNo	Ext. System	Ext. Key
European Inc.	K	333	AS 400	12
European Inc.	K	333	Accounting	511
European Inc.	K	333	Addresses	1100

Note: External keys for persons and properties are stored in the **Ext. Person Key** (XP) and **Ext. Property Key** (XO) info areas. External keys for other info areas are stored in the **Generic external key** (XG) info area.

You can also enter an external key for catalog values. However, there is no info area for these external keys. You can therefore only define one external key, see [Editing Variable Catalogs](#) in the *CRM.core Administrator Guide* and [Importing Catalog Values using External Keys](#) on page 78.

Advantages of External Keys

Learn about the advantages of external keys.

No changes to the company key in Aurea CRM

The company key (**FI_StaNo + FI_SerNo**), person key (**PE_StaNo + PE_SerNo**) and property key (**OJ_StaNo + OJ_SerNo**) used in Aurea CRM does not need to be changed if you use external keys.

Any number of external keys

Any number of external keys can be assigned to each company, person or property (or other record, if defined).

If you are using several external sources (e.g. mainframe, address database etc.), you can synchronize all the various data sources with Aurea CRM.

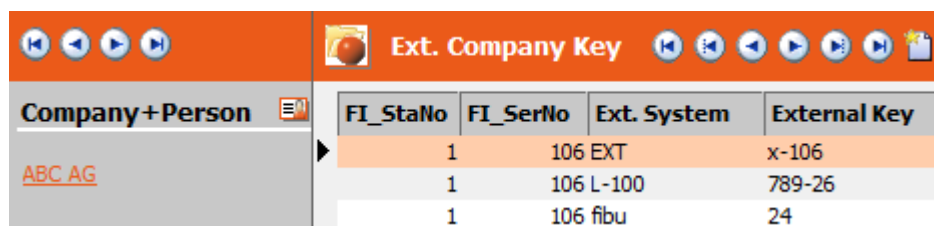
Defining External Keys

Learn how to define external keys.

To define an external key:

- Switch to a company and select **Info > Ext. Company Key** from the menu.
- Switch to a person and select **Info > Ext. Person Key** from the menu.
- Switch to a property (BTB) and select **External Key** from the context menu.

Switch to list view to display a list of all the external keys defined for the current record:



Company+Person	FI_StaNo	FI_SerNo	Ext. System	External Key
ABC AG	1	106	EXT	x-106
	1	106	L-100	789-26
	1	106	fibu	24

- Whenever a new external key is added, the following data from the current record (company, person or property) is automatically included in the external key record:
 - **FI_StaNo** and **FI_SerNo** for companies
 - (**FI_StaNo**, **FI_SerNo**), **PE_StaNo**, **PE_SerNo** for persons
 - **OJ_StaNo**, **OJ_SerNo** for properties
- The combination of **Ext. System** + **Ext.Key** is unique; i.e. each combination can only be used for exactly one person, company or property.

Note: The last key used when importing data is entered in the **Ext. System** and **Ext.Key** fields in the record. Do not define the external key in these fields manually; use the dedicated info areas instead.

Importing using External Keys

To import using external keys, include the **Ext. System** and **Ext.Key** fields in the import format.

Pos.	Field Name	Length
0	FI-Ext. System	80
1	FI-External Key	80
2	FI-Company	120
3	FI-Synonym	30
4	FI-Country	80

These two fields trigger the match-up procedure using the external key. If only the **Ext.Key** is included in the import file, the **Ext. System** must be defined using a default value.

Note: To import property participants using an external property key and external company/person key, import the external keys into the **Property** and **Company/Person** info areas. Import the other fields into the **Property Participant** info area. To import only CP records (without the linked PEs), you need to use the generic external key, i.e. you must add fields of type "ext.key" to CP in the data model and include these fields in the import format.

When matching up data using the external keys, the following steps are carried out:

1. If the **Ext. System** and **Ext.Key** fields are included in the imported record, Aurea CRM searches for these values in its database. If a record is found, this record is matched up.
2. Companies, persons and properties: If searching for the external key returns no results, but the "normal" match-up procedure (e.g. by name and address) finds a matching record, a new record is added to the corresponding external key info area (**Ext. Company Key, Person Key or Property Key**) and the imported **Ext. System** and **Ext. Key** are stored in this record.

Other records (generic external key): If searching for the external key returns no results, but the match-up by station number and serial number finds a matching record, a new record is added to the **Generic external key** info area using the imported **Ext. System** and **Ext. Key**.

3. If no record is found using the normal match-up procedure, a new record is added. A new record is also added to the corresponding external key info area (**Ext. Company Key, Person Key, Property Key or Generic external key**) and the imported **Ext. System** and **Ext.Key** are stored in this record.

Note: When importing using external keys, the corresponding external key info area (e.g. **Ext. Company Key** for companies) does not need to be included in the import format.

Caching External Keys on Import

By default, if an external key info area (X*) is used to match up records, a query `select count(*)` applied to the respective X* table is applied at the beginning of the import process.

The query returns the number of records in the external key table to determine whether the external keys should be cached.

If the external key table contains a large number of external records (several million), executing this query may take a long time.

To speed up the import process you can suppress this initial query for external keys by adding a parameter to the **SQL Where clause**:

Syntax

<code>/*cache:< infoAreaId >*/</code>	Records in the corresponding external key table are cached.
<code>/*notcache:<infoAreaId>*/</code>	Records in the corresponding external key table are not cached.

Available values for < infoAreaId >:

XG - Generic external key

XF - External company key

XP - External person key

XO - External property key (BTB version only)

X? - All of the above

Example

```
--sqlwhere "/*notcache:XG*/"
```

Records in the **Generic external key** (XG) info area is not cached.

Note: This option is available for both importing from a file or database table, see [Defining an Import/Export format](#) on page 19. To use it when importing from a file, you need to specify it in the `--sqlwhere` command line parameter.

Importing Catalog Values using External Keys

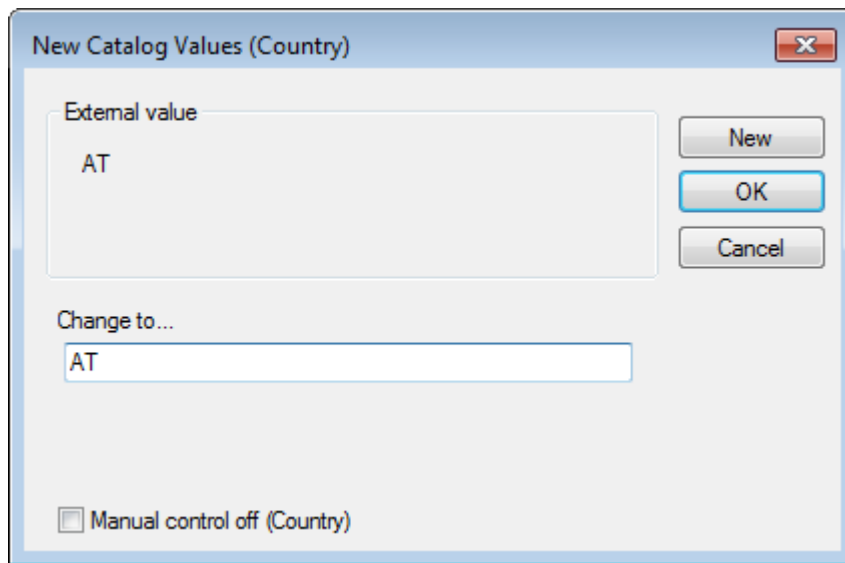
Learn how to import catalog values using external keys.

When matching up catalog fields using external keys, the following steps are carried out:

1. If the **External Key** option is enabled for the field (e.g. **Country** in the **Company** info area) in the field properties of the import format, the catalog value's external key is used to match up the record, see [Field Properties](#) on page 51.

Note: You can use a different external key for different language versions of the same catalog value if you start the **Import** module in the corresponding language: The system first matches up data using the external key of the catalog value in the current language. If this key is not present, the external key of the catalog base language is used instead. (If the key is not present in the catalog base language, the keys entered for other languages are **not used** to match up data.)

2. If step 1 is not successful, the catalog value's text is matched up, first in the current language and then in the catalog base language.
3. If step 2 is also unsuccessful, and the **Prompt new catalog entry** option is enabled in the **File Format** dialog, new catalog values are matched up using the **New Catalog Values** dialog, see [File Format](#) on page 36.



- Select **New** to add the value as an external key **and** text entry in the catalog base language.
- Select **OK** to select an existing value to be used instead of the imported value or to enter a new value. The external key is not imported.
- Select **Cancel** to prevent the catalog value from being added.

Note: You can disable the manual match-up of catalog values for individual fields by enabling the **Automatically add new catalogs** option in the **Field Properties**, see [Field Properties](#) on page 51.

Importing in the Catalog info area

The **Text in base language** field in the **Catalog** info area can store either the current catalog value's external key or the text in the catalog base language (in which case the content of the **External Key** is used to match up catalog values).

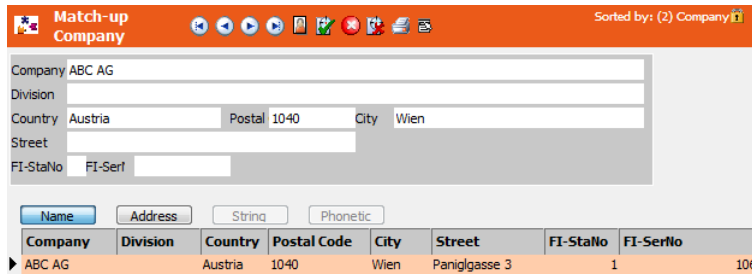
You can use the **1st Par. Cat. Text** field to import dependent catalog fields (e.g. **Interest**, dependent on the **Interest Group**) into the **Catalog** info area. This field can store either the external key or the parent catalog text in the base language. The parent key or text is first matched up, then the catalog value itself. If no corresponding entry is found for the parent catalog, the record is rejected as false.

Executing the Import

Learn how to execute an import.

1. Click the **Start** (→) button to start the import process.
2. If you have determined that records should be matched up automatically, you receive a confirmation message once the import is complete. You should then examine the log files.

- If you have determined that data should be matched up manually, the following mask is displayed if a similar record is found:

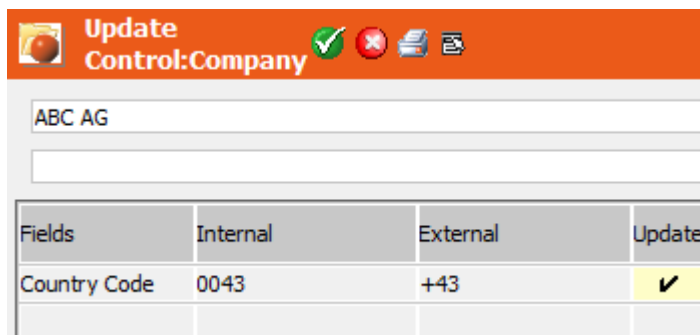


The upper section displays the record in the import file. The list below lists those records in the Aurea CRM database that are similar to the imported record.

- If one of the companies listed is the same as the imported company, select the company in the list and click on (**Found**). If the company is not listed, click on (**Not Found**).

The following options are available from the **View** menu:

- **External Mask:** Displays all the external data in the custom mask.
 - **Internal Mask:** Displays all the internal data in the custom mask.
 - **Close Mask:** Closes the external or internal mask.
 - **Define List Format** and **Load List Format:** You can configure the list used to display similar records in Aurea CRM, >> Lists in the User Manual.
- If you have not specified any match-up control options for fields in the info area, the companies are merged according to the defined match-up options. Internal data is overwritten by the external data.
 - If you have defined match-up control fields, the following dialog box is displayed:



- **Fields:** The field that is defined as a match-up control field.
- **Internal:** The internal data (in the Aurea CRM database).
- **External:** The external data from the import file.

7. Enable the **Update** cell if the external contents should be imported. Otherwise, the existing value is retained.
8. Select **Ignore All** if you wish to retain the entire internal record. External values are then ignored. The record is not rejected as false, however.
9. Select **Record Is Wrong** if you wish to reject the record as false. If you have enabled the log files, the record is output to the *.fal log file. If numerical values are imported which are too long for the internal fields, they are rejected as false. Rejected records are displayed in red in the test run.
10. Once the import procedure has been completed, a confirmation message is displayed and you can examine the log files.

The import procedure is also logged in the **Communication Logs** info area (C3), see [Logging the Import/Export](#) on page 82.

Executing the Export

Learn how to execute the export.

Click **Start** () to start the export.

The data is exported to the selected file or database.

The number of records exported is displayed in the **No. of Records** field for each info area.

Note: Select **Data > Export Deleted Records** from the menu to include deleted records in the export (i.e. those records where the **DelCd** field is enabled).

Exporting to a Database from the Command Shell

To export data from the command shell, create the export format for the external database.

For further details, see [Defining an Export Format for an External Database](#) on page 27. If the export format is already defined then you can find them in the FT infoarea.

Executing a single Export

If you wish to override the connection details of the external database defined in the export format, then keep the new connection details ready.

To execute a single format from the command line use the following command:

```
mmim.exe -e -u <User> -p <Password> -f "<Format Name>"
```

If there are any errors they are displayed on the console. For example:

```
Error 509: 'No import/export fields defined
```

Executing a batch of exports

To execute a series of exports sequentially:

1. Create a text file with the sequence of export jobs one per line. See the sample `batch.txt` file below:

```
-f export2db_Company  
-f export2db_Activities  
-f export2db_Person
```

2. Run the following command:

```
mmim.exe -u <User> -p <Password> -s c:\windows\batch.txt
```

Overriding the Connection Details

To override the connection details saved in the export format file, explicitly provide the connection details on the command, see the following sample command:

```
mmim.exe -e -u <User> -p <Password> -f "AUREASPECS-1210 valid" --DBconn <DB  
connection>  
--DBpass <DB password> --DBname <DB name> --DBtable <DB table>
```

Where `<DB connection>`, `<DB password>`, `<DB name>`, `<DB table>` are the values that override the corresponding connection parameter values saved in the export format.

Logging the Import/Export

Imports and exports are logged in the **Communication Logs** info area (C3).

For further details, see [Communication Logs](#) on page 144.

Depending on your settings in the import or export format (**Info area properties > Log*** options) log files containing records that are matched up, added, identified as similar or rejected during the import are created on the server, see [Info area properties](#) on page 47. You can specify a custom location for these files in the **File Format** dialog (**Log Files** area), see [File Format](#) on page 36.

In addition, you can determine that errors occurred during import or export are logged in the database. To do this, select the **Log import results** or **Log export results** checkbox in the **File Format** dialog.

Note: For imports executed in Aurea CRM web this option is always enabled.

If an error occurs during import, **Import Results** records (C5) are created and linked to the corresponding C3 record.

One C5 record per error is created. If no errors occur, no C5 records are created.

To view these records

- in Aurea CRM win: Select the context menu option **Import Results** in the **Communication Logs** level.
- in Aurea CRM web: Click on **Show log** in the **Import** popup or select **Administration > Jobs & Logs > Communication Log** and view the corresponding sub-list.

Communication Log from 19.08.2014

Menu Create Report

No. 1	Date 19.08.2014	Time 18:16:34
Stat. No.	Station	Output <input type="checkbox"/>
Execution Manual	Format #84163	Log Type Import
Status OK	Error No.	Error

Details

File Name C:\Docu\8.3\web_btb\web.data\temp\sessions\xa3rb1rb3cybwsp2dwtz02kc\fi3.csv	File Size
Destination: rece... <input type="checkbox"/>	Destination: input <input type="checkbox"/>
Quantity 1	Duration Min.
Created by Lisa Simpson	Updated by Lisa Simpson
Destination: error	Data Model

Related Data

Import Results ×

Row No.	Position	Info Area	Error no. 1	Error no. 2	Error message
1		Company	81		error=81, FI.37,
2		Company	532		error=532 (matchup-record not found)

For information on error codes, see [General Error Codes](#) and [Import/Export Error Codes](#) in the *CRM.core Administrator Guide*.

Import and Export Errors

Learn about the reject reasons for import and export.

Records can be rejected as false for the following reasons:

- Data is missing in **mandatory** fields: check whether the rejected records have anything in common (e.g. no entry in the **Currency** field for offer records). The mandatory fields must either contain data or a default value must be defined.
- Import or Export **conditions** are not met by the imported records.
- **User access rights:** Verify that the user that carried out the import procedure has the necessary access rights. The user may have been assigned access rights that prevent the addition of new data.

You can improve performance when importing new companies and persons by turning off the lead status log using the **Do not log lead status changes** configuration option, see [General Settings](#) in the *CRM.core Administrator Guide* and [Lead Status](#) in the *Business Logic Manual*.

3

Communication

Communication is the **exchange of data** between different Aurea CRM stations (**main office, branch offices**).

Communicating ensures that the necessary data is present on each station and is up to date.

The **station number** is central to the communication process. Each station has a unique station number used to identify the station when communicating. The station number is also used to form records' primary keys (e.g. station number + serial number for independent info areas), indicating which station the record is added on, see [Defining Stations](#).

A **data stock download** is used to initialize an empty Aurea CRM database with data. The data stock download must be created on the main office and imported on the branch office, see [Configuring Communication](#) on page 85.

All changes to data made on a station (adding, editing, deleting records) since the last communication session are tracked by the system and must be communicated to all other stations that work with the affected data. To communicate, a **communication file** is output by the **source station** and input on the **target station**, see [Communication Steps](#) on page 120.

Communication files can be transferred from the source station to the target station using telecommunications networks (LAN, FTP, e-mail (MAPI) etc.) or using external media.







Data in the communication file is compared to and merged with the data in the target database, see [Match-up](#).

Communication formats and **distributed logic** define which data is output and input by each station. For example, you can determine that the main office only outputs companies assigned to a notebook owner when communicating with notebooks, see [Communication Format](#) on page 89 and [Distribution Logic](#) on page 110. The **synchronization** process ensures that data required by a station (based on the communication format and distributed logic) is present on branch offices, see [Synchronization](#) on page 131.

Communication can be started **automatically** (from the command line) or manually (from the **Station** and **Communication** info areas), see [Starting Communication](#) on page 124.

Note: You can communicate with up to 1,000 stations in a single communication process.

Info Areas in the Communication Module

	<p>Stations are defined in the Station info area. Important information regarding communication processes (deletions, synchronization, catalog maintenance) is logged here see Station on page 87.</p>
	<p>Define communication formats in the C.Format info area to determine which is communicated under what conditions, see Communication Format on page 89.</p>
	<p>Use the Distribution Logic info area to further restrict the data communicated to this station, see Distribution Logic on page 110.</p>
	<p>Use the Communication info area to define the data connections between stations that should communicate with each other, and assign a communication format to the connection, see Communication Info Area on page 113.</p>
	<p>Communication processes are logged in the Communication Log info area, see Communication Logs on page 144.</p>
	<p>The Station Overview info area provides a graphical overview of the communication setup, showing stations and connection, see Station Overview on page 148.</p>

Configuring Communication

Learn the steps to configure communication.

To configure communication on the main office:

1. Switch to the **Rights** module:

- a. Define the stations that should communicate with each other, see [Station](#) on page 87.

Configure one station as the **main office** by enabling the **Main Office** field in the station record. The data model can only be edited on this station.

Configure one station as the **catalog maintenance station** by enabling the **Aut.Cat.Maintenance** field in the station record. The **Catalog Maintenance** (KW) info area is only maintained on this station. Changes to variable catalogs are communicated to all other stations by the catalog maintenance station, see [Communicating Catalogs](#) on page 139.

Define access rights for the remaining stations that prevent users from making changes to the **Catalog** info area, to prevent data inconsistencies, see [Defining Access Rights for Variable Catalogs](#) in the *CRM.core Administrator Guide*.

- b. Define the languages available in Aurea CRM and assign the desired languages to the stations, see [Defining Languages](#) and [Assigning Languages](#) in the *CRM.core Administrator Guide*.
 - c. Define reps and logins, see [Defining Reps](#) in the *CRM.core Administrator Guide*.
 - d. Define a communication user (e.g. "COM") and **only** assign this user (and the SU) access to the **Communication** module to ensure that data cannot be overwritten by concurrent communication processes, see [Module Access Rights, System Locks and Process Tracking](#) in the *CRM.core Administrator Guide*.
2. Switch to the **Communication** module:
- a. Use the **C.Format** and **Distribution Logic** info areas to determine which data to communicate, see [Communication Format](#) on page 89 and [Distribution Logic](#) on page 110.
 - b. Define the connections between stations in the **Communication** info area, and assign communication formats to the connections, see [Communication Info Area](#) on page 113.
3. Create a data stock download and input it on the branch offices, see [Data Stock Download](#) on page 117.

Once the data stock download has been input on the branch offices, changes to data can be automatically communicated between the stations, see [Communication Steps](#) on page 120.

Station

The **Station** info area stores information on the stations in your setup. Each station corresponds to a computer that hosts an Aurea CRM database.

Each station requires a station record that refers to the station itself, and records for all stations that the station communicates with:

1. Define all stations on the main office (see [Defining Stations](#)) and communicate the station records as part of the initial data stock download, see [Data Stock Download](#) on page 117.

The **Station** info area is available in both the **Rights** (see [Station](#) in the *CRM.core Administrator Guide*) and **Communication** modules. The two info areas are identical except for the context menu:

- The context menu in the **Rights** module contains the entries **Languages** and **Distribution Logic**, see [Assigning Languages](#) in the *CRM.core Administrator Guide* and [Distribution Logic](#) on page 110.
- The context menu in the **Communication** module contains the entries **Distribution Logic**, **Input**, **Output**, see [Starting Communication](#) on page 124.

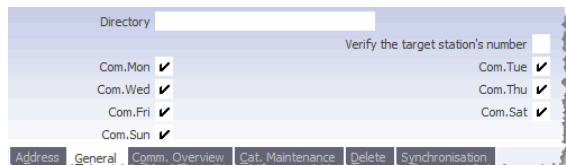
Defining Stations

To configure stations for communication:

1. Define the station as described in Defining a Station.

Station configuration form showing fields for Stat.No., Stat. Name, Main Office, Aut.Cat.Maintenance, Station Access Rights, Desktop Format, Default Telephone Profile, Telephone Profiles, Country, Postal Code, City, Street, E-mail addr., Country Code, Area Code, Tel 1, Tel 2, and Fax. The form is sorted by (1) Stat.No. and has a View button. The Address tab is selected, showing sub-tabs for General, Comm. Overview, Cat. Maintenance, Delete, and Synchronization.

2. Set one station as the **Main Office** and one station as the catalog maintenance station (**Aut.Cat.Maintenance** field), see [Communicating Catalogs](#) on page 139.
3. Enter the station's e-mail address in the **E-mail addr .** field on the **Address** tab for stations that communicate via e-mail, see [Communicating via E-mail](#) on page 128.
4. The following settings are available on the **General** tab:



- **Verify the target station's number:** Enable this option to determine that the system should verify that the communication file is intended for this station before inputting the file. If the station number in the communication file does not match the current station's number, the process is canceled.
- **Com.Mon - Com.Sun:** Enable these check boxes to determine the days of the week on which data can be output to this station. All days are enabled by default.

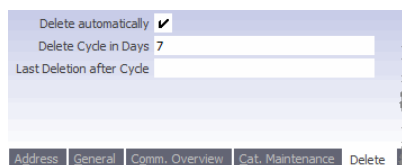
You can disable one or more days, for example to carry out maintenance.

Note: These days only affect communication initiated via the command line or from the **Station** info area. Manual communication (started from the **Communication** info area) is not affected, see [Starting Communication](#) on page 124. You cannot use default values (**View > Default Values**) to enter the communication days.

- **Directory:** By default, directories for communication files are named according to the station number, >> [Directory structure](#) on page 9. You can specify a different directory name here, e.g. to name directories according to the station's name (e.g. .. \main office\del instead of .. \1\del etc.).

Aurea recommends retaining the default settings.

- Information on the communication process and automatic catalog maintenance is entered by the system on the **Comm. Overview** and **Cat. Maintenance** tabs, see [Comm. Overview Tab](#) and [Communicating Catalogs](#) on page 139.
- Use the **Delete** tab to configure how deleted records are handled:



- **Delete automatically:** Enable this option to automatically delete records with an active delete code from the local database once the time period in the **Delete Cycle in Days** field has expired, see [Communicating Deleted Records](#) on page 137.
- **Delete Cycle in Days:** Once the number of days entered here (default:7) have expired, the system checks for records with an active delete code. If you do not enter a value here, records are deleted each time communication takes place.
- **Last Deletion:** The time records are last deleted is entered here automatically.

7. Use the **Synchronization** tab to determine how often databases at branch offices should be synchronized with the main office. Synchronization is used to ensure that branch offices have all the data they require, see [Synchronization](#) on page 131.

Enter the synchronization interval in the **Sync.Cycle (Days)** field in the branch office station records (e.g. every 28 days). If you do not enter a value, the databases are synchronized each time the stations communicate.

You only need to enter a synchronization interval for branch offices.

8. Select **Distribution Logic** from the context menu if you want to define conditions applied to the communication data for each station, see [Distribution Logic](#) on page 110.

Communication Format

The **C.Format** (Communication Format) info area is used to determine which data is output or input on a station.

You then need to define a connection between the communicating stations in the **Communication** info area and assign the communication format to the connection, see [Communication Info Area](#) on page 113. You need to define the connection between stations and a communication format before you can communicate.

The following general rules apply to communication:

- Data in an info area is only communicated if the **Output** and **Input** cells are enabled for the info area in the communication format.
- Dependent records are only communicated if the parent record is communicated.

Examples:

- Activities are only communicated if the activity's parent person or company is communicated.
- If the **Person** info area is not communicated, but the **Activity** and **Company** areas are, only company-related activity records are communicated.
- The **City** info area (**Maintenance** module) is not updated when inputting data, i.e. no new city records are added for the cities entered in communicated company records, see [City Info Area](#) in the **CRM.core Administrator Guide**.
- Records in the **WWW Interest** info areas (and any dependent records) are only communicated if company or person records have been generated based on the record, see [WWW Interest](#) in the *User Manual*.

If you do not wish to restrict the data that is communicated between stations, enable the **Output** and **Input** cells for all info areas by clicking on the column headers. Assign the communication format to all communication connections.

If you wish to restrict the communicated data (e.g. by area, rep, product group etc.), you can define conditions in the communication format and/or the **Distribution Logic** info area, see [Defining a Communication Format](#) on page 90 and [Distribution Logic](#) on page 110.

Conditions in the communication format and **Distribution Logic** info areas can be combined using a AND or OR, see [Combining Communication Formats and Distribution Logic](#) on page 112.

Defining a Communication Format

Learn how to define a C.Format.

To define a communication format:

1. Start the **Communication** module, see [Starting Modules](#) on page 13.
2. Switch to the **C.Format** info area.

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect	+Linked Via...	Input	Conditional Input	Field Properties	Match-up Control	Synchron
Key											
System Event											
Language											
Text											
Hierarchy Change											
[-] Tenant											
[-] Additional Tenant											
Configuration											

All available info areas are listed hierarchically in the **Info Area** column.

3. Click in a cell to define your settings, see [Tables](#) in the *User Manual*.

The following options are available:

- **Output:** Enable the **Output** cell for those info areas that should be output. Click on the column header to enable or disable all cells.

Note: Dependent records are only output and input if their parent record is also output or input.

- **Conditional Output:** Enable this cell (in addition to the **Output** cell) and define the conditions that determine which records in the info area should be output, see [Conditional Output](#) on page 92.
- **Bottom-Up Condition:** Use this option to restrict the output of records from parent info areas using conditions applied to child info areas. For example, you could define that a field rep only receives those company records for which an

activity exists where he is entered in the **Rep** field, see [Bottom-Up Condition](#) on page 94.

- **+Bottom-Up:** Use this option to combine conditions applied to child info areas with conditions applied to the parent info area using a logical OR (i.e. records are output if they meet either the parent conditions or the child conditions), see [+Bottom-Up](#) on page 96.
- **Bottom-Up Indirect:** Use this option to restrict the output of records in an independent info area (e.g. Marketing **Activity**) based on conditions applied to another independent info area (e.g. **Company**). Both info areas need to be linked to the same dependent info area (e.g. **Activity**), see [Bottom-Up Indirect](#) on page 97.

Note: **Bottom-Up**, **+Bottom-Up** and **Bottom-Up Indirect** conditions are not applied to records marked as deleted (see [Communicating Deleted Records](#) on page 137). At least one record in the child info area must not be marked as deleted for the condition to be applied to the parent record.

- **+Relationship:** Use this option to output records that are linked to another record in the same info area.

You can restrict the output records using conditions applied to the info area that contains the link (**Ticket**, **Relationship** etc.).

- **Input:** Enable this cell for those info areas that should be input. Click on the column header to enable/disable all cells.
- **Conditional Input:** Enable this cell and define a condition to restrict which records are input in this info area, see [Conditional Input](#) on page 99.
- **Field Properties:** Enable this cell to configure communication settings for individual fields, see [Field Properties](#) on page 99 .

By default, all fields in the info area are communicated. The **Field Properties** cell contains a tick if the settings have been edited.

- **Match-up Control:** By default, companies, persons and properties (BTB only) are matched up based on the primary key (as for all other records), see [Match-up](#). Use this option to define other match-up conditions for these records, see [Match-Up Control](#) on page 101.
- **Synchronization:** By default, the output conditions are used to synchronize, see [Synchronization](#) on page 131. Use the **Synchronization** option to additionally determine that the synchronization should use the input conditions for specific info areas, for example to remove outdated or redundant data from branch offices, see [Synchronizing using Input Conditions](#) on page 136. Input conditions need to be defined for the selected info area (**Conditional Input** column).

Note: Aurea recommends retaining the default settings (match up by primary key) for companies, persons and properties.

- Click on  (**Save**), see [Saving, Loading and Deleting Formats](#) in the *User Manual*.

Note: Use  (**Load**) to load and edit an existing format. Click on  (**Delete**) to clear the current settings. Select **File Print** from the menu to print the communication format, see [Printing Communication Formats](#) on page 109.

- Assign the communication format to one or more communication connections, see [Communication Info Area](#) on page 113.

Conditional Output

You can define conditions for each info area to determine which data in that info area is output.

For example, to restrict the output to companies located in Germany:

- Enable the **Output** cell for all info areas by clicking on the column header.
- Click in the **Conditional Output** cell of the **Company** info area.

The **Define Search Conditions** dialog box is displayed.

- Define the desired condition(s), e.g. **Country** = 'Germany', see [Conditions](#) in the *User Manual*.
- Click on **OK**.

Info Area	Output	Conditional Output	Bottom-Up Condition
[-] Company	✓	✓	
[-] Person (Company)	✓		
Contact Person			
Target Group (Marketing Activity)	✓	Country='Germany'	

- Save the communication format.

Only companies in Germany and their dependent records (persons, activities) are output.

The **Conditional Output** can also contain inactive conditions. As such, there are three possible states:

- No conditions:** The cell is empty. All records are output.
- Active conditions:** The cell contains a tick. Only those records are output that meet the conditions. This condition can also be used in **Bottom-Up** and **+Bottom-Up** conditions, see [Bottom-Up Condition](#) on page 94 and [+Bottom-Up](#) on page 96.

Info Area	Output	Conditional Output	Bottom-Up Condition	HF
Company	✓			
Person	✓			
Act. Target Group	✓			
Contact	✓	✓	Company	
Repetition	✓			
Contact Participant	✓	Rep ID = '000100029'		
Comments	✓			

Only those companies are output for which an activity record exists with rep 000100029, and only those activities are output where rep 000100029 is entered as the rep.

- **Inactive conditions:** The cell contains a grayed out tick. The condition is only used by **Bottom-Up** and **+Bottom-Up** conditions. All records are output for the parent record:

Info Area	Output	Conditional Output	Bottom-Up Condition	HF
Company	✓			
Person	✓			
Act. Target Group	✓			
Contact	✓	✓	Company	
Repetition	✓			
Contact Participant	✓	Rep ID = '000100029'		

Only those companies are output for which an activity record exists with rep 000100029, and **all** activities are output for these companies (irrespective of the rep entered in the activity).

Applying Variable Conditions to the Target Station

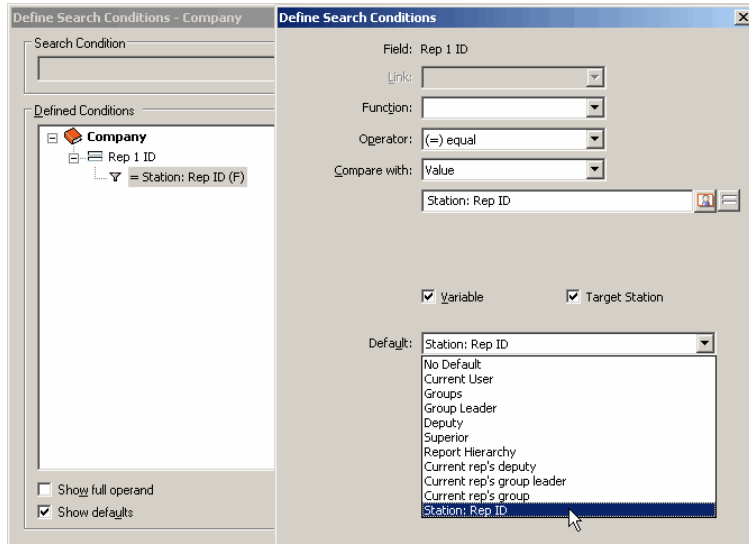
You can define variable output conditions applied to the target station in communication formats.

For example, to only output those companies where the rep assigned to the target station (i.e. the rep whose notebook is the target station) is entered as **Rep 1**.

1. Add a configuration entry to define that the **Rep ID** field in the **Station** info area can be used in variable conditions (**Variable default values for conditions** option in the **Configuration** info area), see [General Settings](#) in the **CRM.core Administrator Guide**.
2. Start the **Communication** module and switch to the **C.Format** info area.
3. Enable the **Output** column for all info areas (by clicking on the column header).
4. Click in the **Conditional Output** cell of the **Company** info area.

The **Define Search Conditions** dialog is displayed.

5. Define the following variable condition (see [Defining Variable Conditions](#) in the *User Manual*):



Use the **Target Station** option to determine that the **Rep ID** is not taken from the current station's record, but from the target station's record (i.e. the receiving station).

Note: The **Target Station** option is only taken into account when outputting communication data.

6. Click on **OK**.

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up	Bottom-Up Filter
Company	✓	✓			
Person	✓				
Act. Target Group	✓		Rep 1 ID='Station: Rep ID'		
Contact	✓				
Repetition	✓				

7. Save the communication format.

Only those companies are output where the rep entered in the **Rep 1** field is the rep entered in the target station's record.

Bottom-Up Condition

Bottom-up conditions allow you to restrict the output of parent records by defining conditions applied to child records.

For example, you could only output those persons for which a sales group record exists that contains a specific rep:

1. Enable the **Output** cell for all info areas by clicking on the column header.
2. Click in the **Conditional Output** cell of the **Sales Group (OTC: Account Manager)** info area.
3. Define the condition, e.g. **Rep 1 ID = '000100029'**.

4. Click on **OK**.

5. Click in the **Bottom-Up Condition** cell of the **Sales Group** info area.

All parent info areas are listed. Records are only output from the info area(s) selected here if the records meet the conditions defined in the corresponding info area's **Conditional Output** cell.

For the **Person** info area (PE) you can choose between the default link and link 500 to read only person-related child records: When outputting PE records, by default all child records linked to PE **and** KP are output. Use link 500 to output PE-related data only.

6. Select the **Person in Company** info area.

7. Click **OK**.

Info Area	Output	Conditional Output	Bottom-Up Condition	+
Company	✓			
Person (Company)	✓			
Contact Person	✓			
Target Group (Marketing Activity)	✓			
Activity	✓			
Repetition	✓			
Activity Participant	✓			
Note	✓			
Mailing	✓			
Demand	✓			
Sales Group	✓	✓	Person (Cor	

8. Save the communication format.

The following records are output:

- All companies
- All sales group records where the rep with ID 000100029 is entered as **Rep 1**.

Note: If you deactivate the conditions defined for the **Sales Group** info area (indicated by a gray tick), all sales group records are output, irrespective of the rep entered in field **Rep 1**, see [Conditional Output](#) on page 92.

- Persons are only output for which a sales group record exists where **Rep 1 ID** = 000100029.
- All the output companies and persons' child records (e.g. activities).

Conditions defined for the parent info area in the **Conditional Output** cell are combined with the bottom-up condition using a logical AND, i.e. the parent records need to meet both conditions to be output.

Use the **+Bottom-Up** option to link the conditions using a logical OR instead, see **+Bottom-Up** on page 96.

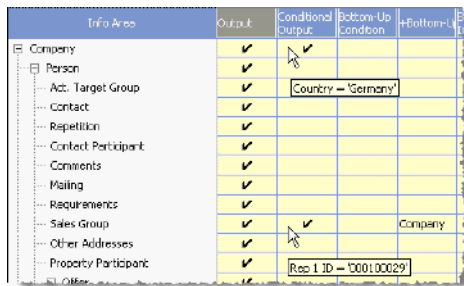
+Bottom-Up

If conditions are defined for a parent info area (**Conditional Output** cell), and you wish to define a bottom-up condition to output **additional** records in the parent info area, define a **+Bottom-Up** condition.

+Bottom-up conditions are applied to the parent info area using a logical OR, i.e. records in the parent info area are output if they meet the conditions defined for the parent info area and/or meet the conditions defined using the +bottom-up condition.

For example, to output all companies in Germany and all companies for which a sales group record exists:

1. Enable the **Output** cell for all info areas by clicking on the column header.
2. Click in the **Conditional Output** cell of the **Company** info area.
3. Define the condition **Country = 'Germany'**.
4. Click **OK**.
5. Click in the **Conditional Output** cell of the **Sales Group** (OTC: Account Manager) info area.
6. Enter the condition **Rep 1 ID = '000100029'**.
7. Click on **OK**.
8. Click in the **+Bottom-Up** cell of the **Sales Group** info area.
All parent info areas are listed.
9. Select the **Company** info area.
10. Click **Ok**.



11. Save the communication format.

The following records are output:

- All companies in Germany
- All sales group records where the rep with ID 000100029 is entered in the **Rep 1** field

Note: If you deactivate the sale group's **Conditional Output** (indicated by a gray tick), **all** sales group records are output, irrespective of the rep entered in the **Rep 1** field, see [Conditional Output](#) on page 92.

- All companies (in all countries) for which a sales group record exists where **Rep 1 ID** = '000100029'
- All the output companies' child records (persons, activities etc.)

Bottom-Up Indirect

Use **Bottom-Up Indirect** conditions to restrict the output of data in an independent info area using conditions applied to another independent info area.

The two independent info areas must be linked to the same dependent info area.

Example

The **Activity** info area is a direct child of the **Company** and **Person in Company** info areas and an indirect child of the **Marketing Activity** info area. All companies in Germany should be output, as well as all companies for which an activity record is added within the scope of a currently ongoing marketing activity.

Define the communication format as follows:

1. Enable the **Output** cell for all info areas by clicking on the column header.
2. Click in the **Conditional Output** cell of the **Company** info area.
3. Define the condition **Country** = 'Germany'.
4. Click on **OK**.
5. Click in the **Conditional Output** cell of the **Marketing Activity** info area.
6. Define the condition **Status** = 'In Progress'.
7. Click on **OK**.
8. Click again in the **Conditional Output** cell of the **Marketing Activity** info area.
The tick is displayed in gray indicating that the condition is only applied when using **Bottom-Up**, **+Bottom-Up** or **Bottom-Up Indirect** conditions, see [Conditional Output](#) on page 92.
9. Click in the **Bottom-Up Indirect** cell of the **Marketing Activity** info area.
All info areas are listed that are linked to the **Marketing Activity** info area.
10. Select the **Activity** info area.
11. Click **OK**.
12. Click in the **+Bottom-Up** cell of the **Activity** info area, see [+Bottom-Up](#) on page 96.
13. Select the **Company** info area.
14. Click **OK**.

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up
[-] Company	✓	✓		
[-] Person (Company)	✓			
Contact Person	✓		Country='Germany'	
Target Group (Marketing Activity)	✓			
Activity	✓			Company

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
[-] Marketing Activity	✓	✓			Activity
Execution (Marketing Activity)	✓				
Statistics (Marketing Activity)	✓		Status='In Progress'		
Rep (Marketing Activity)	✓				
Response (Marketing Activity)	✓				
Log (Marketing Activity)	✓				

15. Save the communication format.

The following records are output:

- All companies in Germany
- All companies (in all countries) for which an activity exists that is added for a marketing activity whose current status is 'In Progress'
- All the output companies' dependent records (persons, activities etc.)
- All activities

+Linked Via...

Aurea CRM contains several info areas that include multiple links to the same info area.

Use the **+Relationship** option to determine that all records linked in this manner should be output. You can restrict the records that are output by defining a condition applied to the info area containing the links.

By default, the **+Relationship** option is only available for the **Company** and **Rep** info areas:

- You can output companies entered in a ticket for a company that is output based on the conditions applied to the **Company** info area.
- You can output reps that are allocated to the same group (**Group Allocation** info area) as a rep that is output based on conditions applied to the **Rep** info area.

You can define additional links in the data model to extend this feature, see [Link](#) in the **CRM.core Administrator Guide**.

For example, to output all companies in Germany, as well as all companies linked to German companies via the **Relationship** info area:

1. Enable the **Output** cell for all info areas by clicking on the column header.
2. Click in the **Conditional Output** cell of the **Company** info area.

3. Define the condition **Country** = 'Germany'.
4. Click on **OK**.
5. Click in the **+Relationship** cell of the **Company** info area.

All info areas are listed that include more than one link to the **Company** info area.
6. Select the **Relationship** info area.
7. Click **OK**.
8. Click in the **+Relationship** cell of the **Relationship** info area.
9. Define the conditions for the relationship type, e.g. **Relationship type** = 'Corporate'

Info Area	Output	Conditional Output	Bottom-Conditional	+Bottom	Bottom-Indirect	Check-Linked	+Linked Persons	+Linked Via...	Input	Conditional Input	Field Properties
Company	✓	Country = 'Germany'							Relation		
Person	✓										
Act. Target Group	✓										
Contact	✓										
Relation	✓										
Survey	✓										
Survey result	✓										
PP-Post-Decks	✓										

10. Save the communication format.

The following records are output:

- All companies in Germany
- All companies linked to a company in Germany via the **Relationship** info area and where the **Relationship type** is 'Corporate'
- All these companies' child records (persons, activities etc.)

Conditional Input

Click in the **Conditional Input** cell to define a condition used to restrict the records that are input.

This option is generally used on the main office to filter data received from branch offices.

The **Conditional Input** is otherwise similar to the **Conditional Output** option, see [Conditional Output](#) on page 92.

You can additionally determine (per info area) that data should be synchronized using the input conditions, for example to remove redundant or outdated data on branch offices, see [Synchronizing using Input Conditions](#) on page 136.

Field Properties

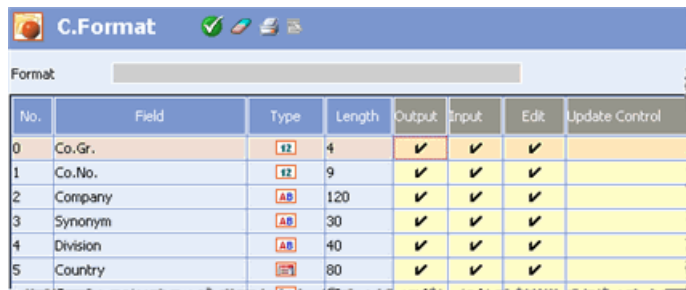
Use the **Field Properties** cell to configure the communication settings for each individual field in an info area.

By default, **all** fields are communicated. The **Field Properties** cell only contains a tick if you have changed the settings from the default.

To define field properties:

1. Click in the **Field Properties** cell of the desired info area.

A list of all fields in the info area is displayed.



The screenshot shows the 'C.Format' application window with a table titled 'Format'. The table has columns for 'No.', 'Field', 'Type', 'Length', 'Output', 'Input', 'Edit', and 'Update Control'. The rows represent different fields with their respective properties.

No.	Field	Type	Length	Output	Input	Edit	Update Control
0	Co.Gr.	I2	4	✓	✓	✓	
1	Co.No.	I2	9	✓	✓	✓	
2	Company	AB	120	✓	✓	✓	
3	Synonym	AB	30	✓	✓	✓	
4	Division	AB	40	✓	✓	✓	
5	Country	AB	80	✓	✓	✓	

2. Enable or disable the following options for the fields:

- **Output:** Enable this option to output the field contents.
- **Input:** Enable this option to input the field contents.
- **Edit:** Enable this option to update the field contents if the input file is more up-to-date.

If you disable this option, the field contents is never updated on this station.


Use the **Update priority** configuration option to prevent fields contents from being overwritten by newer contents, see [Communication](#) in the **CRM.core Administrator Guide**.

- **Update Control:** Enable this option to determine that a dialog box should be displayed if the field content is changed when inputting data. You can then decide whether to retain the existing field contents or overwrite the contents with the data in the communication file, see [Communication with Change Control](#).

Only enable this option in communication formats used to communicate manually, >> [Manual Communication](#) on page 129. This option is ignored when communicating automatically and field contents are always updated.

Note: Start communication from the command line using the `k` parameter to determine that the change control prompt should be displayed, see `mmco.exe`.

The **Output**, **Input** and **Edit** options are enabled by default.

3. Click on  (OK).
4. Save the communication format.

Match-Up Control

You can define specific match-up conditions for companies, persons and properties (BTB only).

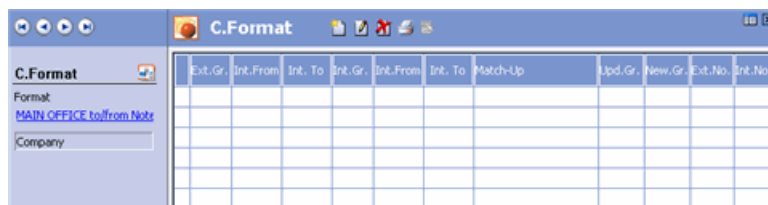
These conditions can extend or replace the default behavior (match-up by primary key), see [Match-up](#).

You can define rulesets used to match up records automatically or determine that similar records should be matched up manually.

Note: Aurea recommends using the default settings (match up by primary key) for companies, persons and properties.

To define your own match-up conditions:

1. Switch to the **C.Format** info area.
2. Load the communication format you wish to define the settings for or define a new format, see [Defining a Communication Format](#) on page 90.
3. Click in the **Match-up control** cell of the desired info area (**Company**, **Person**, **Person in Company** or **Property**).



4. Click on  (**New**).

The **Match-up Control** dialog box is displayed, see [Match-Up Control Options](#) on page 102.

5. Click on **OK** (without changing the settings) to define the default behavior (match up by primary key) as the first line.

Ext. Gr.	Int. From	Int. To	Int. Gr.	Int. From	Int. To	Match-Up	Upd. Gr.	New. Gr.	Ext. No.	Int. No.
0	0		0			No. found -> Change	0	0		

6. Define additional lines containing the desired settings, see [Match-Up Control Options](#) on page 102.

The lines are processed in the order they are listed. Edit the number in the first column to change the order of the lines.

7. Return to the **C.Format** info area.
8. Save the communication format and assign it to the desired communication connection, see [Defining Communication Connections](#).

Note: The match-up settings for FI and KP must be identical.

Match-Up Control Options

Learn about the Match-up controls options.

The **Match-Up Control** dialog box contains the following options:

Internal/External

- **Group:** The station number (company/person group). (Not available for PE.)

If you are matching up records by number, you do not need to enter any values in these fields.

If you are using a different match-up option, you can determine that external records with a certain group are compared to internal records in another group.

- **From no, / To no.:** Currently no function.

Match-up By

Select the desired match-up type from the drop-down list, see [Match-up Types](#) on page 103.

No Manual Control

Enable the **No Manual Control** option to execute the communication process without manual control, irrespective of the execution type entered in the **Execution** field in the **Communication** info area, see [Defining Communication Connections](#) and [Automatic Communication](#) on page 125.

New / Update

Currently no function.

Deny Deletion

- **By external:** External company or person records that have been marked for deletion do not cause the deletion of (identical) internal records, see [Communicating Deleted Records](#) on page 137.
- **By internal:** Internal records marked for deletion are deleted. They cannot be restored by inputting identical external records.

If **Deny Deletion by Internal** is enabled, internal records are physically deleted. External records are added as new records and data linked to these records is requested again.

Use external no./Retain internal no.

- **Use external no.:** If an identical company is found with different external and internal keys when matching up by name/address, the internal record is updated with the external key.
- **Retain internal no.:** If an identical company is found with different external and internal keys when matching up by name/address, the key is retained.

Priority during update

Determines which record is to be retained:

- **Date:** Default value; the more recent record has precedence.
- **External:** If the records have the same date, the external record has precedence.
- **Internal:** If the records have the same date, the internal record has precedence.

Note: Aurea recommends always using the **Date** option.

Match-up Types

Learn about the match-up types.

Select the desired match-up type from the **Match up By** drop-down list.

No. Found -> Change

The primary key of the external record is searched for in the local database.

- If a record is found with the same primary key, the external and internal records are merged, i.e. the internal record is updated with the most recent field contents.
- If no record is found with the same primary key, a new record is added. If further match-up conditions have been defined, these are applied.

Usage: Unique primary keys, no duplicates expected.

No. Found -> Compare Name/Addr.

The primary key and name and address of the external record are searched for in the local database.

- If a record is found with the same primary key, the name and address in the external and internal records are compared. The records are only merged if the

record is judged to be identical after comparing the name and address. Otherwise the record is rejected.

- If a record is found with the same primary key where the name and address **does not** match the data in the external record, the record is handled differently based on the execution type (**Execution** field in the **Communication** info area):
 - The record is rejected as false if the communication process is automatic and/or the option **No manual control** is enabled.
 - If the communication process is started directly from the **Communication** info area using manual and/or manual/automatic execution, and the option **No manual control** is disabled, you can merge the record with the internal record with the same primary key, see [Communication with Manual Match-up](#).
- If no record is found with the same primary key, a new record is added.

Usage: No unique primary keys.

No. not found -> New

The primary key of the external record is searched for in the local database.

- If a record is found with the same primary key, the external and internal records are merged, i.e. the internal record is updated with the most recent field contents.
- If no record is found with the same primary key, a new record is added without matching up the records further.

Usage: Unique primary keys, no duplicates expected.

Name/addr. identical -> Change

The name and address of the external record is searched for in the local database.

- If a record is found with the same name and address as the external record, the records are merged, i.e. the internal record is updated with the most recent field contents.
- If no record is found with the same name and address as the external record, the record is treated as follows depending on the execution type (entered in the **Execution** field in the **Communication** info area):
 - If the communication process is started automatically and/or the **No manual control** option is enabled, the record is added without a prompt.
 - If the communication process is started directly from the **Communication** info area, or the execution type is "Manual/Autom.", similar internal records are listed, see [Communication with Manual Match-up](#).

Name/addr. identical -> New

Use this option to check for records with the same name and address, and to add the record even if an identical record is found.

Usage: When individual companies should be present in the database multiple times (e.g. for billing purposes).

No. Similar -> Log

If the external and internal keys are identical but the name and address are different, the record is saved to a log file (`sim.*`). This file then needs to be manually imported and matched up, see [Inputting SIM files](#).

Name/Address Similar -> Log

If internal records are found with a similar name and address to the external record, the external record is saved to a log file (`sim.*`)

-> Log

Records are not matched up any further, but are immediately written to a log file (`sim.*`).

Communicating System Tables

For Aurea CRM to work correctly on all stations, info areas containing configuration settings need to be communicated.

Apply the following settings to your communication formats:

- **Key:** Enable the **Output** and **Input** cells to ensure that serial numbers are assigned correctly, see [Key Info Area](#).
- **Language:** Output the **Language** info area to all branch offices to ensure that all languages are available on all stations, see [Multi-Language Catalogs](#) in the *CRM.core Administrator Guide*. Deny access to the **Language** info area on branch offices in the **Rights** module, see [Defining Rights at the Info Area Level](#) in the *CRM.core Administrator Guide*.
- **Text:** Enable the **Output** and **Input** cells. Texts can be added and translated on branch offices, see [Text](#) in the *CRM.core Administrator Guide*.
- **Tenant and Additional Tenant:** Enable the **Output** and **Input** cells if you are working with tenants, see [Tenants](#) in the *CRM.core Administrator Guide*.
- **Configuration:** Always communicate the **Configuration** info area to branch offices, see [Configuration Info Area](#) in the *CRM.core Administrator Guide*.
- **Exchange Rate Table:** Enable the **Output** and **Input** cells if you work with multiple currencies, see [Working with Several Currencies](#) in the vertical-specific manuals.
- **Station and dependent info areas/Station Configuration:** Enable the **Output** and **Input** cells for the **Station** info area and child info areas, as well as for the **Station Configuration** info area. If your communication setup includes multiple tiers, communicate the main office's **Station** and **Station Configuration** to all branch offices, otherwise you are prompted to register your license, see [Aurea CRM License](#) in the *CRM.core Administrator Guide*.
- **Rep and dependent info areas:** Enable the **Output** and **Input** cells for the **Rep** info area and its child info areas. Use the **Central Login Configuration** info area

to define logins for users at branch offices, see [Central Login Configuration](#) in the *CRM.core Administrator Guide*.

To communicate logins, include the corresponding records in **both** the **Central Login Configuration** (ES) and **Rep** (ID) info areas in your communication format. The data in the **Central Login Configuration** (ES) info area is transferred to the **Login** (US) info area on the target station, and the corresponding users' directories are added.

The **Login** (US) info area itself is **not** communicated.

- **User Tracking:** Input the **User Tracking** info area from all branch offices, see [User Tracking](#) in the *CRM.core Administrator Guide*.
- **Country and City:** Enable the **Output** and **Input** cells. These info areas are also updated when adding new companies on branch offices, see [Country Info Area and City Info Area](#) in the *CRM.core Administrator Guide*.
- **Relationship Level:** Enable the Send and Receive cells if reciprocal relationships should be added automatically, see Relationships in the User Manual.
- **Format:** The **Format** info area contains a significant portion of Aurea CRM's configuration options (access rights, masks, triggers etc.), see [Formats](#) in the User Manual. Always output the **Format** info area to all branch offices.

Note: Save conditions and transfer formats as global formats so that users at branch offices can also use them, see [Global Formats](#) in the *User Manual*. The data model is always communicated to branch offices if it is changed (irrespective of your communication settings), see [Communicating Data Model Changes](#) in the *CRM.core Administrator Guide*.

If you want to communicate specific formats to specific branch offices, use the **Distrib . code** fields in the **Format** info area to further restrict the communication of certain format types (e.g. conditions).

- **History:** Input the **History** info area on all branch offices, see [History](#) in the *CRM.core Administrator Guide*.

Note: The **Catalog Maintenance** and **Catalog** info areas are **always** communicated. They are not available in the **C.Format** info area, see [Communicating Catalogs](#) on page 139.

- **CRM Process:** Enable the **Input** and **Output** cells for the **CRM Process** info area to ensure the system-wide CRM process configuration functions correctly on all stations, see [CRM Process Configuration](#) in the *CRM.core Administrator Guide*.
- **Stock, Stock Control** etc.: If you are using the stock-related info areas, you need to communicate all info areas containing stock-relevant data, see [Inventory Management](#) in the *Business Logic Manuals*.

The **Stock History** (BTB only) info area is **not communicated**; it is used to record changes to local stocks.

- **WWW Interest** (I1), **WWW Interest Configuration** (I9): Enable the **Input** and **Output** cells for these info areas to ensure that user-specific settings of <offline> users are correctly synchronized between online and offline mode, see [web <offline> Installation & Technical Guide](#).

Key Info Area

The **Key** info area stores the highest existing serial number for each info area and station (in this example for the **Company** info area):

Info Area Code	Index	No1	No2
FI	1	1	200
FI	1	101	10
FI	1	103	3
FI	1	104	1
FI	1	200	1

- **Info area code:** Info area ID
- **Index:** Access index, see [Link](#) in the *CRM.core Administrator Guide*.
- **No1:** Station number
- **No2:** The current highest serial number on this station

The **Key** info area **must** always be communicated for serial numbers to be assigned consistently, see [Communicating System Tables](#) on page 105.

Note: Primary keys can only be changed in the **Maintenance** module once data has been communicated successfully. If you change the primary key after having communicated, records may be output with the new key and may be duplicated.

Communicating Document (D1)

Learn how to control the sending of documents.

You have the following means of restricting the communication of **Document** (D1):

- Define conditions applied to the **Document** info area, see [Conditional Output](#) on page 92.
- Restrict the communication of general documents using the **Document Link** (D3) info area.

By default, D3 links are only communicated if the record entered in the link field is also communicated. A D3 link to an activity record is only communicated if the activity record meets the applicable communication conditions. Use the `D3DontCheck` parameter to disable this behavior, see [mmco.exe Parameters](#) on page 343.

To communicate documents based on the D3 link, you need to define the following settings applied to the **Document Link** info area in the communication format:

1. **Bottom-Up** or **+Bottom-Up** condition applied to the **Document** info area.
2. **Bottom-Up Indirect** condition applied to the Document info area.

Examples:

- To only output documents for which a D3 link exists:

Info Area	Send	Send Condition	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
Document link	✓		Documents		Documents
Documents	✓				

- To further restrict the communication of documents with D3 links:

Info Area	Send	Send Condition	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
Document link	✓		Documents		Documents
Documents	✓	✓			
Tasks	✓				
Tasks Confirmation	✓	Doc.Class = 'Offer'			

In this case, documents are only output if a D3 link exists OR the **Doc. Class** is "Offer".

- To output documents for which a D3 link exists OR whose Doc. Class is "General":

Info Area	Send	Send Condition	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
Document link	✓			Documents	Documents
Documents	✓	✓			
Tasks	✓				
Tasks Confirmation	✓	Doc.Class = 'General'			

Use this format to output general documents (e.g. mass mailing documents) with no D3 link, in addition to documents with D3 links.

- To only output documents for which a D3 link to a specific info area exists:

Info Area	Send	Send Condition	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
Document link	✓	✓	Documents		Documents
Documents	✓				
Tasks	✓	Link Type = 'MA'			

In this case, documents are only output if a D3 link to an activity record exists.

- To restrict the output of documents with D3 links based on the parent info area of the link record:

Info Area	Send	Send Condition	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect	Pe
Company	✓					
Person	✓					
Company Hierarchy	✓	Country = 'UK' OR Country = 'USA'				
Document link	✓		Documents		Documents	
Documents	✓					

Documents with D3 links are output under the following conditions:

If a D3 link exists to an activity record for a company in the UK or USA, the D3 link and corresponding document are output.

If the D3 link references an activity for a company in France, the link is not output (and consequently, neither is the document).

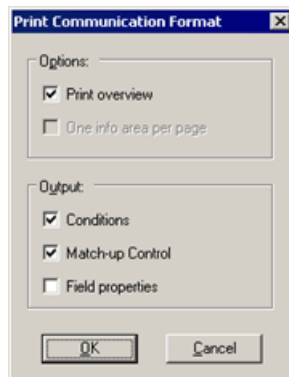
Note: Communicating documents based on D3 links can have a negative impact on performance.

Printing Communication Formats

Learn how to print a communication format.

To print a communication format:

1. Load the desired communication format, see [Saving, Loading and Deleting Formats](#) in the User Manual.
2. Select **File > Print** from the menu.



3. Choose **Print Overview** to print an overview, or print **One page per info area**.
4. Select the details to be included in the printout from the **Output** pane: The **Conditions** defined in the communication format, the **Match-up Control** settings and the defined **Field Properties**.
5. Click on **OK**.

Distribution Logic

Use the **Distribution Logic** info area to define conditions used to output records to a specific station.

These conditions and output conditions in the communication format can be combined using a logical AND or OR, see [Combining Communication Formats and Distribution Logic](#) on page 112.

AND use case: You can define a general communication format for multiple stations and define conditions that differ between stations (e.g. applied to **Rep** fields) in the **Distribution Logic** info area, see [Defining the Distribution Logic](#).

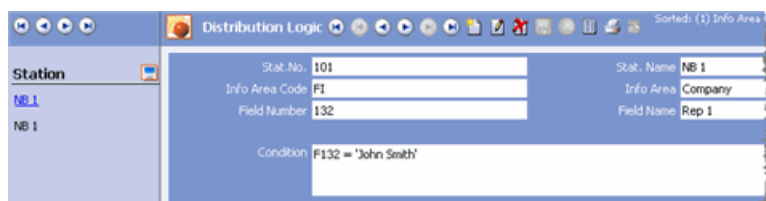
OR use case: You can define that companies are only output for reps if the rep is entered in the company record (communication format); but that all companies in a group leaders area of responsibility (country, area or similar) are output (distribution logic record using and OR link).

In contrast to communication formats, you can import distribution logic records, making them easier to administrate.

Defining the Distribution Logic

To define a distribution logic record:

1. Switch to the desired target station in the **Station** info area.
2. Select **Distribution Logic** from the context menu.



3. Select the **Info Area** you wish to apply conditions to.
You need to add a record for each info area you wish to apply conditions to.
4. Select the name of the field you wish to apply a condition to from the **Field Name** field.
5. Enter the condition in the **Condition** field, see [Distribution Logic Conditions Syntax](#).

Note: You can define conditions applied to multiple fields in a single distribution logic record. Use the **Field Name** or **Field Number** fields to look up the field numbers. The values selected in these fields are for your information only and not used in any conditions.

6. Click on  (**Save**).

In the above example, company records are only output to station 101 if John Smith is entered in the **Rep 1** field. This corresponds to defining the condition **Rep 1 = 'John Smith'** in the **Conditional Output** cell in the communication format.

You can also define similar conditions using variable output conditions in the communication format. For this to work, each station needs to be assigned to a single rep (e.g. notebooks for field staff), see [Applying Variable Conditions to the Target Station](#).

Distribution Logic Conditions Syntax

Use the following syntax to define conditions in the **Distribution Logic** info area:

- **F<Field Number> = 'Value'**, e.g. **F132 = 'John Smith'**.

Values that contain spaces must be enclosed in single quotes. If several values are linked using AND/OR, the values must also be enclosed in single quotes.

- The following **operators** are supported:

=, >, <, <>, >=, =<, [] (included), [] (not included).

Aurea CRM automatically ensures that a single space is present prior to and following operators when saving the record.

- You can use placeholders:

* represents any number of characters, ? represents a single character.

- Conditions can be combined using **AND** and **OR**, e. g. **F5 = 'US' OR F5 = 'UK'**.
- You can use brackets to group conditions, e.g. **F5= 'US' AND (F7 > '90000' AND F7 < '91000')** for US companies with a postal code between 90000 and 91000.
- Use a point as the decimal separator (e.g. **'3.1416'**).
- Format for date values: **'YYYYMMDD'**
- Format for time values: **'HHMM'**
- Format for Boolean fields: **'Y'** = true; **'N'** = false.
- Format for dependent catalog values: **'Catalog Value~Parent Catalog Value'**, e.g. 'Ink jet printer'~'Printer'.
- Syntax for tenant catalog values: **'Catalog Value{ {Tenant Number}}'** e.g. 'Printer{{300}}' for the "Printer" catalog value assigned to tenant 300, see [Tenants](#) in the *CRM.core Administrator Guide*.
- Syntax for tenant numbers in dependent catalog values: **'Catalog Value{{Tenant Number}}~Parent Catalog Value{{Tenant Number}}'**, e.g. 'Ink jet printer{{300}}~Printer{{3}}' for the catalog value 'Ink jet printer' assigned to tenant 300, and whose parent catalog value is 'Printer' assigned to tenant 3.

Note: If no tenant number is specified for catalog values in conditions, the catalog value is searched for in the following order:

1. A matching catalog value with the same tenant number as is entered for the communicating rep.
 2. A matching catalog value with no tenant number.
 3. No matching value. The search is terminated.
-

- Syntax for external keys for variable catalog values: '**#External Key**', e.g. '#4711' for catalog value 'Ink jet printer' with the external key '4711'.
- Syntax for fixed catalog values: '**Catalog Value~Code** ', e.g. 'Day~1' for Monday. These codes can be determined in the data model, see [Editing Predefined Fixed Catalogs](#) in the *CRM.core Administrator Guide*.

Combining Communication Formats and Distribution Logic

You can use a combination of communication formats and distribution logic to minimize administrative overheads when making changes to communication settings.

Following settings can be used:

- Define a general communication format (e.g. for all field staff) which communicates configuration settings and rep- and territory-independent data, see [Communicating System Tables](#) on page 105 and [Defining a Communication Format](#) on page 90.
- Add distribution logic records for the laptops used by field staff. Use the distribution logic records to distribute records based on companies, territories, sales group etc., see [Defining the Distribution Logic](#).

The output conditions in the communication format and distribution logic record are combined using a logical AND by default (i.e. records are only output if they meet both sets of conditions). Enable the **Link with OR** fields in the **Distribution Logic** info area to change this behavior.

You can define bottom-up conditions, for example, using distribution logic records. To do so, enter the desired bottom-up condition in the communication format and define the condition applied to the dependent info area for each station in the **Distribution Logic** info area.

In this example, the following data should be output for all reps:

- all companies where the rep is entered in a sales group
- all these companies' dependent records
- the expenses records of the rep
- all ongoing activities

Define the following settings:

1. Switch to the **C.Format** info area.
2. Enable the **Output** and **Input** cells for all info areas by clicking on the column header.
3. Click in the **Conditional Output** cell of the **Marketing Activity** info area.
4. Define the condition **Status** = 'In Progress'.
5. Click on **OK**.
6. Click in the **Bottom-Up Condition** cell of the **Sales Group** info area.

7. Select the **Company** info area.
8. Click on **OK**.

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect
Company	<input checked="" type="checkbox"/>				
Person	<input checked="" type="checkbox"/>				
Act. Target Group	<input checked="" type="checkbox"/>				
Contact	<input checked="" type="checkbox"/>				
Repetition	<input checked="" type="checkbox"/>				
Contact Participant	<input checked="" type="checkbox"/>				
Comments	<input checked="" type="checkbox"/>				
Mailing	<input checked="" type="checkbox"/>				
Requirements	<input checked="" type="checkbox"/>				
Sales Group	<input checked="" type="checkbox"/>		Company		
Other Address	<input checked="" type="checkbox"/>				

Activity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Act. Execution	<input checked="" type="checkbox"/>				
Act. Statistics	<input checked="" type="checkbox"/>				
Act. Rep	<input checked="" type="checkbox"/>		Act. Status = "In Progress"		

9. Save the communication format.
10. Switch to the **Station** info area.
11. Add two distribution logic records for each of the desired stations (i.e. the notebooks used by field staff), see [Defining the Distribution Logic](#):
 - For the **Sales Group (SB)** info area: **F97 = '<Rep>'** (determines that the specified rep must be entered in the **Rep 1** field)
 - For the **Expenses (B2)** info area: **F64 = '<Rep>'** (determines that the specified rep must be entered in the **Rep** field)

Communication Info Area


Use the **Communication** info area to define the communication connections between stations.

You need to define a record for each direction in which data is communicated (i.e. one record from station A to B, and one from B to A), see [Defining Communication Connections](#).

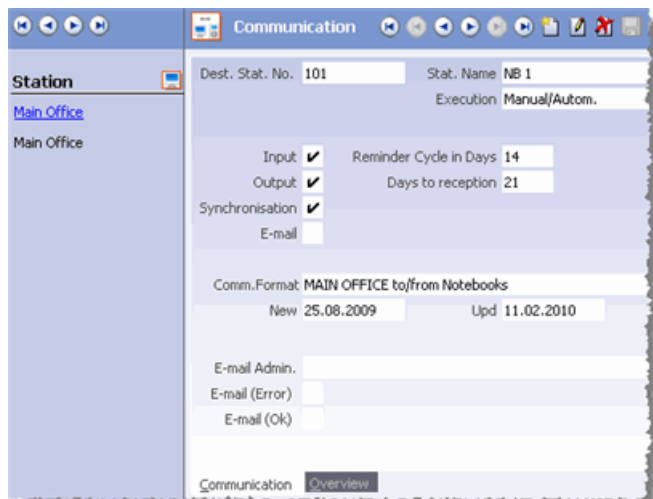
Use the **Output** and **Input** context menu entries to store the communication process, see [Starting Communication](#) on page 124.

Defining Communication Connections

To define a communication connection between two stations:

1. Switch to the **Station** info area in the **Communication** module.
2. Switch to the **source station's** record (e.g. the main office).
3. Open the **Communication** info area.
4. Click on  (**New**).

5. Enter the number of the **target station** in the **Dest . Stat. No.** (in this case notebook "NB 1" with station number 101).
6. Click in the **Comm.Format** field and select the desired communication format (e.g. the communication format defined in [Combining Communication Formats and Distribution Logic](#) on page 112).



7. The **Output** and **Input** check boxes are enabled by default. You can only start communicating using this connection from the command line or the **Station** info area if the Output and **Input** check boxes are enabled.

Note: These settings do not affect communication from the **Communication** info area (using the **Output** and **Input** buttons).

You can add separate communication records for input and output, if you wish to use different communication formats for input and output.

8. Enable the **Synchronization** check box to synchronize the database on the target station with the source station, see [Synchronization](#) on page 131.
9. Enable the **E-mail** check box if the stations should communicate via e-mail, see [Communicating via E-mail](#) on page 128.

Note: Only enable this check box once you have output the initial data stock download(s), or use the `- oe` parameter to output the data stock downloads, see [mmco.exe Parameters](#) on page 343.

10. Enter the number of days that the source station should wait for data from the target station in the **Reminder Cycle in Days** field, see [Reminder Cycle](#) on page 151.
11. Enter the number of days that the source station should wait for a receipt confirmation from the target station in the **Days to Reception** field, see [Confirmation](#) on page 124. If this time period is exceeded, the communication process is automatically repeated, see [Automatically Repeating Communication](#).


12. Use the **Execution** field to determine how companies, persons and properties (BTB only) that are input should be matched up, see [Match-Up Control](#) on page 101.

- **Manual/ Autom .** (default): The type of match up is determined by the mode of communication (manual or automatic). If communication is manual, records are matched up manually; if communication is automatic, similar records are written to SIM files.
- **Manual:** Data is matched up using manually.

Note: You cannot initiate "Manual" communication from the command line.

- **Automatic:** Records are not matched up manually. Similar records are saved to a SIM file.

When communicating automatically, communication connections defined with the execution type "Automatic" are used. If no such communication connection exists, communication takes place using a communication connection defined as "Manual/Autom.", see [Automatic Communication](#) on page 125.

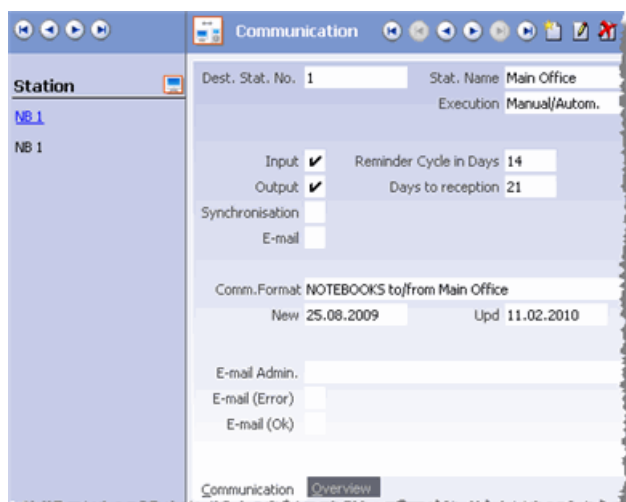
13. Click on  in the **E-mail Admin** field and select a rep to send communication logs to via e-mail, see [Communication Logs](#) on page 144. If no e-mail address is entered for this rep, the logs are not sent.

14. Enable the **E-mail (Error)** and **E-mail (Ok)** fields to determine that logs should also be sent if errors occur or the communication is successful respectively.

15. Save.

The main office (station number 1) can now output data to and receive data from branch office "NB 1" (station number 101). The communication connection in the opposite direction now also needs to be defined:

1. Switch to the target station's record in the **Station** info area (in this case notebook "NB 1" with station number 101).
2. Define the connection to the main office (in this case station number 1).



Note: The **Synchronization** check box does not need to be enabled for communication connections from branch offices to the main office, as only data on branch offices is synchronized, see [Synchronization](#) on page 131.

- Click in the **Comm.Format** field and select the desired communication format. If you choose a different communication format from the one used to communicate in the other direction, data input on the target station may be restricted further.

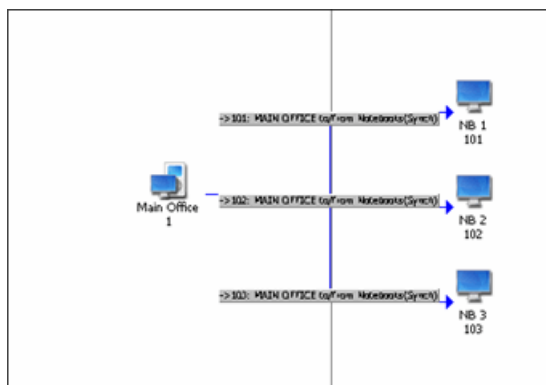
If you defined all input and output conditions in the communication format assigned to the connection **from** the main office **to** the branch office, the other direction only requires a communication format where the **Output** and **Input** cells are enabled for all info areas, as the data need not be filtered further on the branch office.

- Save.

Switch to the **Overview** tab to display a graphical overview of the connections you have defined, see [Overview Tab](#).

Overview Tab

The **Overview** tab in the **Communication** info area provides a graphical overview of all communication connections defined from the currently selected station:



In this example, communication connections are defined from the main office to 3 notebooks:

- Synchronization is enabled for all 3 connections, see [Synchronization](#) on page 131.
 - All 3 connections use the same communication format ("MAIN OFFICE to/from Notebooks"). Data is then further restricted using distribution logic records, see [Combining Communication Formats and Distribution Logic](#) on page 112.
- Right-click on the overview and select **Vertical**, **Horizontal**, **Circular** or **Centered** to change the appearance of the overview.

Note: If you define further connections on the **Communication** tab, you need to restart the **Communication** module for these changes to be reflected in the overview.

The **Station Overview** info area displays a graphical overview of the connections between **all** stations, see [Station Overview](#) on page 148.

Data Stock Download

To initialize an empty database at a branch office, a data stock download needs to be output on the main office and input on the branch office.

Prerequisites:

- Aurea CRM win must be installed on the branch office and a database connection must be configured, see [Installation Guide](#).
- The database on the branch office must be empty, see [Troubleshooting](#) on page 162.

To output a data stock download (e.g. for notebook "NB 1", station number **101**) and input it on the target station:

1. Define all the necessary communication settings on the main office (station number **1**), see [Configuring Communication](#) on page 85.

Ensure that the communication format includes all data necessary to communicate with the main office, see [Communicating System Tables](#) on page 105.

On the main office, define the reps that works on the branch office, see [Defining Reps](#) in the *CRM.core Administrator Guide*. Add logins for these reps in the **Central Login Configuration** info area, see [Central Login Configuration](#) in the *CRM.core Administrator Guide*. Once the data stock download has been input on the branch office, the reps can log on to the branch office and work with Aurea CRM win.

2. Start the communication module with the following command line (see [mmco.exe Parameters](#) on page 343):

```
mmco.exe -u com -p <Password> -k o,101,u
```

The **Communication** module is started and the `\101\` directory (corresponding to the branch office) is added to the data directory, see [Directory Structure](#). The communication file containing the data stock download is created and saved in the `\101\out` directory, see [File Names](#).

Note: You can output data stock downloads for several stations at once (`-k o ,101,102,103,u`). Use `-k o ,u` to create a data stock download for **all** stations for which a communication connection exists. Use the `--oe` parameter to output data stock downloads for stations that are configured to communicate via e-mail, >> [Communicating via E-mail](#) on page 128.

3. Add the directory `\1\in` to the data directory on the branch office.
4. Transfer the communication file to this directory, see [Transferring Communication Files](#) on page 122.

5. Start the **Communication** module with the following command line on the branch office:

```
mmco.exe -u com -p <Password> -k i,1,+
```

6. The data stock download is input: System data (station numbers, catalog values, formats, languages, stations, reps etc.) is input first, then customer data.

Once the input is complete, the branch office is ready for operation.

All communication sessions are logged in the **Communication Logs** info area, see [Communication Logs](#) on page 144.

Changes to data can now be communicated automatically, see [Communication Steps](#) on page 120.

Note: The access rights defined in the **Rights** module are ignored when communicating, see [Rights and Communication](#) in the *CRM.core Administrator Guide*.

Directory Structure

The first time you output communication on a station, several directories are added to the data directory.

Example: The main office (station number **1**) outputs data to notebook "NB 1" (station number **101**). The following directories are automatically added to the data directory on the main office:

```
101  \del
      \err
      \in
      \out
      \sim
```

del : Currently no function.

err : If input is canceled due to an error, the communication file that caused the error is saved in this directory, see [Failed Communication Sessions](#) on page 163.

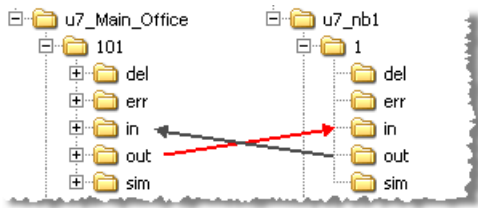
in : Communication files from "NB 1" (station **101**) that should be input on the main office (station **1**) must be copied to this directory, see [Communication Steps](#) on page 120.

out : Communication files for "NB 1" (**101**) are output to this directory.

sim : Log files generated when using the match-up options **No. Similar -> Log, Name/Address Similar -> Log** and **->Log** are stored in this directory, see [Match-up Types](#) on page 103.

Before you can input data on the target station, you need to add an `in` directory to the corresponding source station's directory (e.g. in this case `\1\in`).

The communication file output on the main office to the directory `\101\out` must be copied to the `\1\in` directory on "NB 1" and vice versa:



File Names

- **Communication files** are named according to the output date with a serial number (starting from 0) appended: For example, 20090331.1 is the second communication file output on 31 March 2009.

Communication files are saved using the extension `.part` until the output is complete (these are known as "temporary communication files").

- **Notification files**, created each time files are input, are named as follows: N0000143.2 is the **143rd** Notification created by a station confirming the receipt of the **2nd** communication file received on this day on this station, see [Confirmation](#) on page 124.
- **Log files** generated when using the match-up options **No . Similar -> Log, Name/Address Similar -> Log** and **->Log** are named as follows: `sim.0`, `sim.1` etc., >> [Match-up Types](#) on page 103 and [Inputting SIM files](#).

Quick Mode

If large amounts of data need to be available on offline stations, the time needed to create initial data stock download files for all stations may increase to more than a day.

To shorten the duration of outputting and inputting initial data stock download files, add the following setting to the global `mm.ini` file:

```
[Communication]
FastLoad=*
```

To create initial data stock download files for specific stations, specify the station numbers:

```
FastLoad=1000,1001,...
```

Using this entry shortens the time needed for outputting the communication files. Inputting these tuned files on the target stations also needs less time.

Note: The actually achievable gain of time depends on the environment and amount of data.

Please note the following **restrictions**:

- No other process must be active while inputting the communication file on the target station.
- Calculations are copied "as is": Info areas where calculations done by the business logic occur (e.g. all offer items for an offer) cannot be exported conditionally, i.e.

the communication format must not contain output conditions on info areas that are children of FI, KP or OJ (BTB only) and in which calculations occur.

- If a specially tuned file is input, the new quick input method is used only if the target database is empty (i.e. at least FI, KP and OJ (BTB only) must be empty) and if the + parameter is used (`mmco.exe -u com -p <Password> -k i , 1 , +`).

Communication Steps

Once a branch office has been initialized using a data stock download, the branch office can communicate with the main office.

The communication process involves the following steps:

- The main office inputs changes received from branch offices (see [Input](#) on page 122).
- The main office outputs changes for branch offices (see [Output](#) on page 121). The communication files are transferred to the branch offices (see [Transferring Communication Files](#) on page 122).
- The branch offices each input the changes received from the main office (see [Input](#) on page 122).
- The branch offices output changes made to data on the branch offices for the main office. These communication files are transferred to the main office.
- The main office inputs changes received from the branch offices etc.

Note: You can communicate with a maximum of 1,000 stations in a single communication session.

Communication processes can be completely asynchronous: data stored in the **Communication** module determines which data needs to be output in the next communication session, see [Output](#) on page 121.

Communication logs are created each time data is input or output, see [Communication Logs](#) on page 144. The logs also include information on whether output communication files are input successfully (see [Confirmation](#) on page 124), whether records are missing (see [Synchronization](#) on page 131) and whether the output needs to be repeated (see [Troubleshooting](#) on page 162).

Note: The access rights defined in the **Rights** module are ignored when communicating, see [Rights and Communication](#) in the *CRM.core Administrator Guide*. Consequently, no triggers are initiated when inputting communication files, see [Database Events](#) in the *CRM.core Administrator Guide*.

Output

Once a data stock download has been input on a branch office, only changes to data (new, edited and deleted records) since the last communication session are communicated.

This delta information is determined from the following:

- The **Station** info area stores the following information for each station:
 - The date, time and success of the last input and output (**Comm. Overview** tab), see [Comm. Overview Tab](#).
 - The ID of the last catalog maintenance record communicated to the station (**Cat. Maintenance** tab), see [Communicating Catalogs](#) on page 139.
 - The date on which deleted records are last communicated (**Delete** tab), see [Communicating Deleted Records](#) on page 137.
 - The date of the last synchronization (**Synchronization** tab), see [Synchronization](#) on page 131.
- The date and time of communication logs for output files are used to determine which changes have occurred in the database since the last communication file is output, see [Communication Logs](#) on page 144.
- System fields in each record store information on when, where and by whom the record is added or edited, and whether the record has yet been communicated, see [System Fields](#) in the *CRM.core Administrator Guide*.

Start the output as described in [Starting Communication](#) on page 124.

Comm. Overview Tab

The date, time and success of the last input and output is stored for each station that communicates with the current station on the **Comm. Overview tab** in the **Station** info area.

For example, the station record for "NB 1" (station number 101) on the main office could be similar to the following:

Station	
Stat.No.	101
Stat. Name	NB 1
Main Office	
Aut. Cat. Service	
Station Access Rights	SR_Standard
Desktop	
Default Telephone Profile	
Telephone Profiles	
Last Output Date	11.02.2010
Last Input Date	11.02.2010
Last Output Time	12:04:00
Last Input Time	12:03:57
Last Output Duration	
Last Input Duration	
Last Output OK	<input checked="" type="checkbox"/>
Last Input OK	<input checked="" type="checkbox"/>
New	11.09.2009
Address General Comm. Overview Cat. Service Delete Synchronisation	

The main office last output data to "NB 1" on 11/02/2010 at 12:04:00. The output is successful.

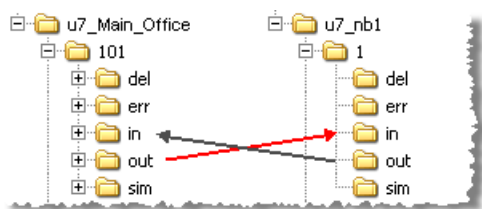
The main office last input data from "NB 1" on 11/02/2010 at 12:03:57. The input is successful.

Transferring Communication Files

Once output, communication files need to be transferred to the target stations.

You can transfer the files over a network (LAN, FTP, e-mail (MAPI) etc.) or use external media. Note that additional settings are required in Aurea CRM to be able to communicate via e-mail (MAPI), see [Communicating via E-mail](#) on page 128.

Ensure that the communication files are copied to the correct `in` directories on the target station (see [Directory Structure](#)):



Delete the communication files from the `out` directory once the file has been transferred to ensure that the same file is not inadvertently communicated and input twice.

Input

Learn about the input step of communication.

Inputting communication files on a branch office

1. Transfer the communication files to the directory `<source station number>\in` on the target station, see [Transferring Communication Files](#) on page 122.
2. Start the input, see [Starting Communication](#) on page 124.
3. Data is input in the following order:
 - a. The data model, if it has changed, see [Communicating Data Model Changes](#) in the *CRM.core Administrator Guide*.
 - b. Catalog maintenance records missing on the branch office (based on the entry in the **(In.) Cat.Maint . ID** field in the station record), see [Communicating Catalogs](#) on page 139.
 - c. All other data as determined by the communication format.

The input records are matched up with the records in the local database, see [Match-up](#).
4. If the communication format has changes since the last synchronization, a synchronization request is output, see [Synchronization](#) on page 131.

5. If records are to be deleted according to the delete cycle, they are now deleted, see [Communicating Deleted Records](#) on page 137.
6. Once the input is complete, a notification file is output which must be input on the source station to complete the communication cycle, see [Confirmation](#) on page 124.

Inputting communication files on the main office

1. Transfer the communication files to the directory `\<source station number>\in` on the target station, see [Transferring Communication Files](#) on page 122.
2. Start the input, see [Starting Communication](#) on page 124.
The input records are matched up with the records in the local database, see [Match-up](#).
3. If a synchronization request is sent by the branch office, the requested records are output in a separate communication file, see [Synchronization](#) on page 131.
4. If records are to be deleted according to the delete cycle, they are now deleted, see [Communicating Deleted Records](#) on page 137.
5. Once the input is complete, a notification file is output which must be input on the source station to complete the communication cycle, see [Confirmation](#) on page 124.

Note: When inputting values in combined date and time fields (type: "date,time"), the values are converted to the station's local time zone (`TIMEZONE` entry in the `mmdb.ini` file). Values in simple date or time fields are not converted, see [Data Model](#) in the *CRM.core Administrator Guide*. Use `mmba.exe --writeDateTime` to output a list of all combined date and time fields, see [mmba.exe Parameters](#) in the *CRM.core Administrator Guide*. To disable the automatic conversion of times, enter `v` in `mmdb.ini`, see [mmdb.ini and mmodbc.ini Files](#) in the *CRM.core Administrator Guide*.

Match-up

When inputting records from the source station, these records are matched up with the records on the target station. By default, records are matched up using the **primary key**. If records with identical keys are found, the records are merged. If no matching record is found, the record is added to the database.

Aurea CRM saves the modification date and time for each record and each field. When merging records with identical primary keys, these **time stamps** and the settings in the communication format determine which data is retained, see [Conditional Input](#) on page 99 and [Field Properties](#) on page 99.

Select **View > All Mask Fields** and click on  (**Show last change**) to display these time stamps for a record.

Use the **Update priority** configuration entry to prevent the contents of individual fields from being overwritten by newer contents, see [Communication](#) in the *CRM.core Administrator Guide*. This allows you to prevent data that is synchronized with external systems from being overwritten from data resulting from the communication with branch offices, for example.

You can define specific match-up settings for companies, persons and properties (BTB only) in the communication format, see [Match-Up Control](#) on page 101. Aurea recommends retaining the default settings (match up by primary key) for the **Company**, **Person**, **Person in Company** and **Property** (BTB only) info areas and to subsequently merge any duplicate records in Aurea CRM's main module, see [Managing Companies and Persons](#) in the Aurea CRM win User Manual.

Confirmation

One or more notification files are generated in the `out` directory whenever communication files are input.

For further details, see [File Names](#).

These notification files must be transferred to the source station and input there to confirm receipt of the communication file.

Once the notification file has been input on the source station, the **Destination: received** and **Destination: input** check boxes in the communication logs are enabled for the corresponding communication session, see [Communication Logs](#) on page 144.

If an error occurs while inputting data, only the **Destination: received** check box is enabled and the corresponding error number is entered in the **Destination: error** field, see [Failed Communication Sessions](#) on page 163.

Starting Communication

Learn how to start communication from command line and from CRM Win.

You can start communication as follows:

- From the command line, see [mmco.exe Parameters](#) on page 343, or automatically, see [Automatic Communication](#) on page 125.
- From the **Station** info area in the **Communication** module:
 1. Switch to the station record in the **Station** info area.
 2. Select **Input** or **Output** from the context menu.

Doing so starts communication with **all** stations that are configured to communicate with the current station (e.g. selecting **Output** on the main office creates communication files for all branch offices that communicate with the main office), see [Manual Communication](#) on page 129.

Note: Aurea recommends that you always communicate with all stations. You can only communicate via the command line or from the **Station** info area on

those days for which communication is allowed (**Com.Mon** – **Com.Sun** fields in the **Station** info area), see [Defining Stations](#).

- From the **Communication** info area in the **Communication** module:
 1. Switch to the current station's record in the **Station** info area.
 2. Switch to the desired record in the **Communication** info area.
 3. Select **Output** or **Input** from the context menu.

This allows you to communicate with a **single** station, see [Manual Communication](#) on page 129.

Note: Stations can only communicate if a communication connection is defined between the stations, see [Communication Info Area](#) on page 113.

Automatic Communication

Once a branch office has been initialized using a data stock download, the branch office can communicate with the main office automatically.

To use automatic communication without manual match-up requires:

- Always use the COM user to prevent concurrent communication sessions from overwriting data.

If you use the SU for automatic communication, you need to use the option `q` (`mmco.exe -u su -p <Password> -k o,q`), see [mmco.exe Parameters](#) on page 343. Otherwise you are prompted to register your license and the communication process is canceled.

- Use communication formats that require no user interaction:
 - Disable **Change control**, see [Field Properties](#) on page 99.
 - If you have customized the match-up behavior (default is match up by primary key, see [Match-up](#)), you need to enable the **No manual control** for each match-up line you define for the line to be applied, see [Match-Up Control](#) on page 101. Use match-up settings that log similar records, see [Automatic Communication with SIM Files](#) on page 129.

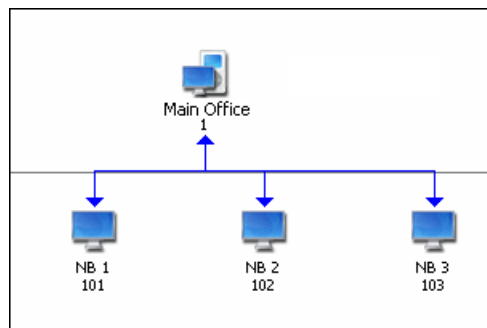
Note: Use the `m` and `k` parameters to communicate automatically with manual control. Messages are output, changes can be verified manually and records can be matched up manually, see [Communication with Change Control](#) and [Communication with Manual Match-up](#).

- Select **Automatic** or **Manual/ Autom .** as the **Execution** type (**Communication** info area) in communication connections that should support automatic communication, see [Defining Communication Connections](#).
- Start automatic communication sessions from the command line, see [mmco.exe Parameters](#) on page 343 and [Automatic Communication Examples](#) on page 126. Use batch files that start `mmco.exe` with the desired parameters and transfer communication files to where they can be accessed by the target station.
- Use time-controlled software (e.g. Windows' Task Planner) to start communication automatically.
- You can automate the transfer of communication files with update.transfer 2.0.

Automatic Communication Examples

An Example of automatic communication.

3 notebooks (**101, 102, 103**) communicate with the main office (**1**):



A data stock download has been input on all 3 notebooks. Automatic communication between the stations could be implemented as follows:

Outputting communication files on the branch offices

The output on each of the branch offices (**101, 102, 103**) is started using the following command line (>> [mmco.exe Parameters](#) on page 343):

```
mmco.exe -u com -p <Password> -k o,1 -c x:\move_com_files.bat
```

- The **Communication** module (`mmco.exe`) is started using the COM user (`-u, -p`).
- Changes to data are output for the main office (**1**), see [Output](#) on page 121. The communication files are written to the `1\out\` directory on each branch office.
- A batch file is used to transfer the communication files to a repository where the main office retrieves the files, see [Transferring Communication Files](#) on page 122.

Inputting communication files on the main office

The communication files from the branch offices need to be moved to the corresponding `in` directories on the main office:

```
..\101\in\20090907.0 etc.
```

```
..\102\in\...
```

```
..\103\in\...
```

Input the communication files using the following command line:

```
mmco.exe -u com -p <Password> -k i
,101,102,103,1
```

- The **Communication** module (`mmco.exe`) is started using the COM user (`-u, -p`).
- The communication files from stations 101, 102 and 103 are input (`i`), >> [Transferring Communication Files](#) on page 122.

Note: If you do not explicitly specify station number, available communication files are input for all stations for which a communication connection exists.

- Records marked as deleted are deleted (`1`), see [Communicating Deleted Records](#) on page 137.

Communication files that are input successfully are automatically deleted from the `in` directories.

A notification file is output to the corresponding `out` directories (`\101\out` etc.), >> [Confirmation](#) on page 124.

Output communication files on the main office

Output the communication files using the following command line:

```
mmco.exe -u com -p <Password> -k o,101,102,103 -c x:\move_com_files.bat
```

- The **Communication** module (`mmco.exe`) is started using the COM user (`-u, -p`).
- The communication files are output for stations 101, 102 and 103 (`o`), >> [Output](#) on page 121.

Note: Use the parameter `-k o` to output communication files for all stations for which a communication connection exists.

- The communication files are written to the following directories:

```
..\101\out
```

```
..\102\out
```

```
..\103\out
```

- A batch file is used to transfer the communication files to a repository where the branch offices retrieve the files, >> [Transferring Communication Files](#) on page 122.

Note: You can combine input and output operations:

```
mmco.exe -u su -p <Password> -k i,1 -k o
```

The station inputs communication files from all connected stations (i). Records marked as deleted are automatically deleted in the process (1). The station then outputs communication files for all connected stations (o).

Input communication files on the branch offices

The communication files and notification files need to be transferred to the `\1\in` directory on the branch offices.

The input is started using the following command line:

```
mmco.exe -u com -p <Password> -k i,1,1
```

- The **Communication** module (`mmco.exe`) is started using the COM user (`-u, -p`).
- The communication files from the main office (1) are input (i), see [Input](#) on page 122.
- Records marked as deleted are deleted (1), see [Communicating Deleted Records](#) on page 137.
- The information in the notification files is entered in the corresponding communication logs records, see [Confirmation](#) on page 124.

Communication files that are input successfully are automatically deleted from the `in` directories.

A notification file is written to the main office's `out` directory (`\1\out`).

Communicating via E-mail

You can send communication files using an e-mail client that supports MAPI.

The communication files are sent via e-mail. The receiving station identifies the files and inputs them automatically.

Prerequisites for communication via e-mail:

- Enter the corresponding e-mail address of the communicating stations in the station records (**E-mail addr .** field on the **Address** tab), see [Defining Stations](#).
- Enable the **E-mail** check box for the corresponding communication connections in the **Communication** info area, see [Defining Communication Connections](#).

Note: Only enable the **E-mail** check box once you have output the initial data stock download(s), or use the `-oe` parameter to output data stock downloads, see [mmco.exe Parameters](#) on page 343.

- If communication should be time-controlled (without any manual interaction), you need to define a settings that can be used by Aurea CRM to log on to the e-mail client. These settings depend on your e-mail client and version of Aurea CRM.

For further information, contact Aurea's support, see *Aurea Global Support* topic in the [Introduction](#) on page 9.

- You need to define a default profile that can be used by Aurea CRM to log on to your e-mail client.

Note: Errors that occur when communicating via MAPI are logged in the **System Event** info area, see [System Event Info Area](#) in the *CRM.core Administrator Guide*.

Automatic Communication with SIM Files

If you are using match-up settings that deviate from the default (match up by primary key) and wish to communicate automatically, use match-up settings that log similar records, and enable the **No manual control** option for each line in the match-up settings.

For further details, see [Match-Up Control](#) on page 101.

When inputting communication files, a log file containing similar records is written to the `sim` directory, for example to `\1\sim\sim.0`, `sim.1` etc. on the main office (station number 1).

These `sim` files need to be input manually (using a communication format with manual match-up), see [Inputting SIM files](#).

Note: Input the `sim` files before the next automatic input.

Manual Communication

Learn about manual communication in Win CRM.

Use manual communication:

- With communication formats where the **Change control** option is enabled, see [Field Properties](#) on page 99 and [Communication with Change Control](#).
- If you want to match up records manually, see [Match-Up Control](#) on page 101 and [Communication with Manual Match-up](#).
- To input `sim` files, see [Inputting SIM files](#).

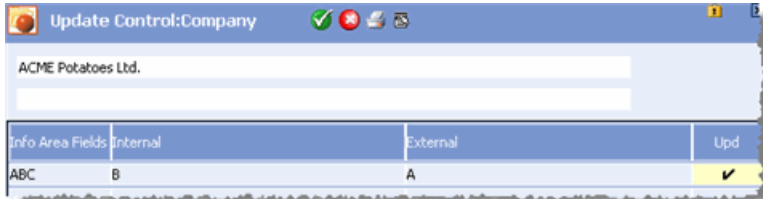
Prerequisites for manual communication:

- Select **Manual** or **Manual/ Autom** . as the **Execution** type (**Communication** info area) in communication connections that should support manual communication, see [Defining Communication Connections](#).
- If you are deviating from the default match-up behavior (match up by primary key, see [Match-Up Control](#) on page 101), ensure that the **No manual control** option is disabled if you want to match up records manually, see [Match-Up Control](#) on page 101 and [Communication with Manual Match-up](#).

Start the manual communication session from the **Communication** or **Station** info areas, see [Starting Communication](#) on page 124.

Communication with Change Control

If you input using a communication format where the **Change control** option is enabled (see [Field Properties](#) on page 99), a dialog is displayed for each change to a field's contents:



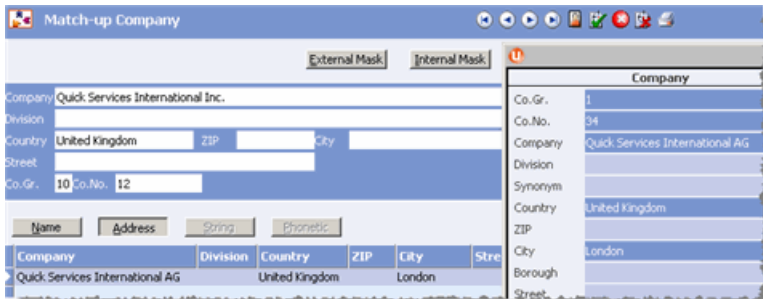
Disable the **Upd** cell to prevent a change from being applied to the local database.

Click (OK) to continue inputting the communication file.

Click (**Cancel**) to cancel the input process. The communication file is retained in the `in` directory and can be input at a later time.

Communication with Manual Match-up

If Aurea CRM finds a similar company (according to the match -up settings) when inputting data, the **Match-up** info area is opened:



Compare the external record (mask) with the internal records (list):

- Click **External Mask** or **Internal Mask** to display all fields in the external or internal record.
- Use the **Name** and **Address** buttons to display records with similar names or addresses.
- Select a record in the list and click on (**Found**) to merge the external record with the selected record.
- Click on (**Not Found**) to add the external record as a new record. (If you are using the **No. Found -> Compare Name/ Addr** . match-up option, the record is rejected as false instead of being added.)
- Click on (**Cancel**) to cancel the match-up process.

Inputting SIM files

Similar records that are logged as a result of automatic communication (**No. Similar -> Log, Name/Address Similar->Log, ->Log** options) must be input and matched up manually, see [Automatic Communication with SIM Files](#) on page 129.

1. Transfer the SIM files to the corresponding `in` directory. For example, if records from a branch office (station 101) have been logged on the main office (station 1), they need to be transferred from the `\1\sim` directory to the `\101\in` directory.
2. Switch to the corresponding communication connection in the **Communication** info area, see [Manual Communication](#) on page 129.
3. Select **Input** from the context menu.
4. Match up the records as described in [Communication with Manual Match-up](#).

Note: Input the `sim` files before the next automatic input.

Synchronization

The synchronization function regularly verifies that data stored on branch offices is complete.

The system checks that the branch office's database contains all the required companies, persons etc. and whether data needs to be deleted or requested. Synchronization takes place automatically at fixed intervals (**Sync.Cycle (Days)** field in the **Station** info area) within the scope of "normal" communication.

Independent info areas are synchronized if output conditions are applied to the info area in the communication format, see [Configuring Synchronization](#) on page 132. (Info areas used to manage stocks are subject to additional requirements, see [Synchronization and Stocks](#) on page 136).

The **Stock Control** info area (OTC) requires all stock-related data to be present on branch offices to correctly track the inventory. For this reason, records (e.g. companies) linked to stock-relevant data are not deleted when synchronizing.

Synchronization is required:

- if **field contents** are edited on the main office, and these fields are used as the basis for conditions defined in communication formats or distribution logic records
- if **communication formats** or **distribution logic** records are edited

Field changes

If the communication format contains the condition "Company, Rep = Smith", companies are only output to stations using the communication format where "Smith" is entered in the **Rep** field.

If the entry in the **Rep** field is changed from "Smith" to another rep, changes to these records are no longer communicated to branch offices.

Synchronization ensures that these records are nonetheless updated. Otherwise you would need to completely delete the database on the branch office and input a new data stock download to update the records.

Edited communication format

A communication format could be extended so as to communicate additional records to a station, e.g. the condition "Company, Rep = Jones" is added to the format and combined with the condition "Company, Rep = Smith" using a logical OR.

Company records that fulfill the condition "Rep = Jones" added before the communication format is changed can only be communicated to branch offices using the synchronization function.

Without synchronization, only newly added records and field changes would be output in the next communication session.

Configuring Synchronization

Learn how to configure synchronization.

To configure synchronization:

1. Start the **Communication** module, see [Starting Modules](#) on page 13.
2. Switch to the main office's record in the **Station** info area.
3. Switch to the **Communication** info area, see [Defining Communication Connections](#).
4. Enable the **Synchronization** check box for the desired connections.

Note: Branch offices area always synchronized by the station directly above them in the communication hierarchy. The **Synchronization** check box must always be enabled for connections **to** branch offices, but not in the opposite direction.

5. Enter the synchronization interval in the **Sync.Cycle (Days)** field on the **Synchronization** tab in the station records corresponding to the branch offices (e.g. every 28 days), see [Defining Stations](#).

If you do not specify an interval, synchronization occurs with each communication session.

6. Define conditions in the communication format that should be applied to the info areas to be synchronized, see [Defining a Communication Format](#) on page 90.

You can use dummy conditions (e.g. **New** <> <empty>, which is always true) to determine that info areas only restricted using distribution logic records should also be synchronized, see [Distribution Logic](#) on page 110.

Synchronization Process

In the following example, only companies in Germany are output to a branch office. The communication format is subsequently updated so that companies in both Germany and Switzerland should now be communicated to the branch office.

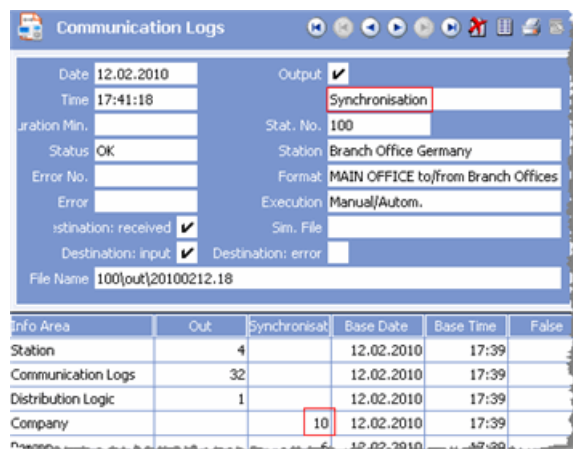
The next synchronization takes place according to values in the **Sync.Date** and **Sync.Cycle (Days)** fields in the branch office's record on the main office (or the branch office's immediate parent).

Note: The **Sync.Date** is not entered on branch offices.

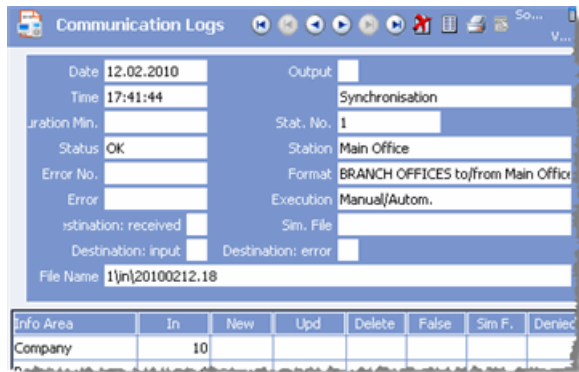
Synchronization occurs whenever a station communicates and the synchronization cycle has been exceeded:

1. The communication format output by the main office also includes synchronization data containing the keys of all records that should be present on the branch office according to the communication format in addition to the normal communication data.

The synchronization data and the number of records to synchronize are written to the communication logs, see [Communication Logs](#) on page 144.

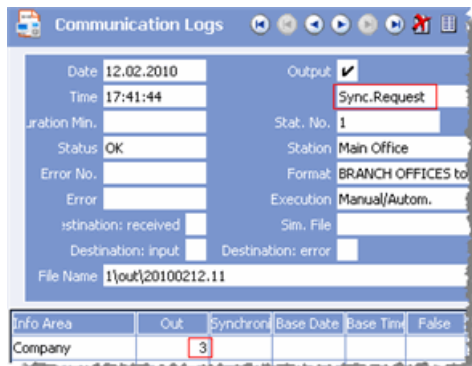


2. The communication file is input on the branch office. The "normal" communication data is input first, followed by the synchronization data. (In this example, 10 companies should be present on the branch office.)

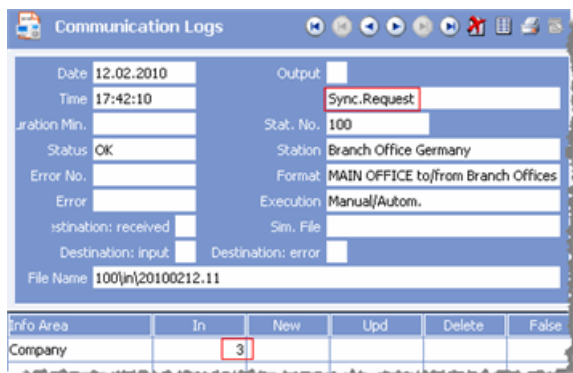


The keys output by the main office are compared to the keys on the target station: Records that should not be present on the target station according to the synchronization data are deleted immediately, see [Deleting Records when Synchronizing](#).

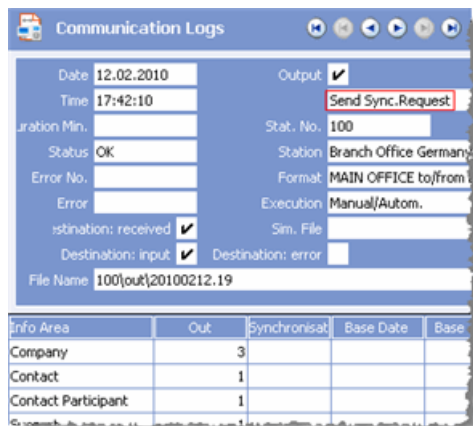
3. A communication file is output which includes a **synchronization request** for those records missing on the branch office. (In this example, the 3 missing Swiss companies are requested.)



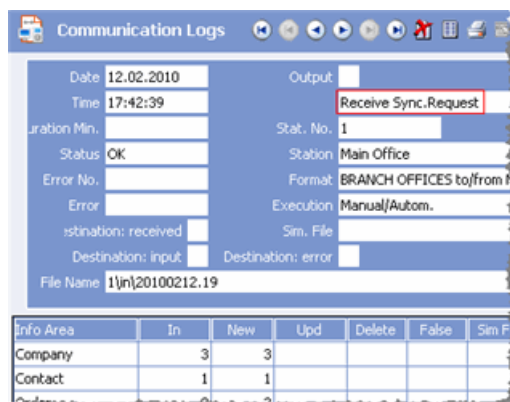
4. Transfer the communication file to the main office, see [Transferring Communication Files](#) on page 122.
5. The synchronization request is received by the main office when this communication file is input:



6. The missing records (and their dependent records) are automatically output by the main office:



7. Transfer the communication file to the branch office.
8. Input the communication file including the requested records on the branch office:



Synchronizing the branch office is now complete.

Deleting Records when Synchronizing

When synchronizing, the keys in the synchronization data are compared to the keys in the database on the branch office. All records whose keys are not included in the synchronization information are deleted from the database. Dependent records are also deleted. These records are only deleted on the branch office; **no** delete codes are set, see [Communicating Deleted Records](#) on page 137.

The following security mechanism is in place to handle records added on the branch office that meet the communication conditions but are not yet present on the main office:

- Records that have not yet been communicated (the **CmCd** field is disabled) are not deleted.
- If records have been communicated, the system checks when they are last communicated to the main office (**Date**, **Time** and **Status** of the last output log on the branch office, see [Communication Logs](#) on page 144): The record is only deleted if it has not been updated on the branch office since the last communication session.

Exceptions:

- The change or addition cannot have taken place on the same day as the synchronization is input. These records cannot be deleted by the synchronization process.
- The change takes place after the system checks for deleted record, as a result of inputting data from another station (in a multi-tier communication setup). These records are not deleted by the synchronization process.

Redundant or outdated data on branch offices can be deleted via synchronization by using input conditions, see [Synchronizing using Input Conditions](#) on page 136.

Synchronizing using Input Conditions

When synchronizing data using output conditions, dependent records can be retained on branch offices that should no longer be present according to the communication format.

Use the **Synchronization** option in the communication format to determine (per info area) that data at branch offices should be synchronized based on the input conditions to remove these redundant records.

1. Define an input condition in the communication format for the branch offices. For example, no activities should be input that are older than 3 months, see [Conditional Input](#) on page 99.

Info Area	Output	Conditional Output	Bottom-Up Condition	+Bottom-Up	Bottom-Up Indirect	Check-Linked	+Linked Persons	+Linked Via...	Input	Conditional Input	Field Properties	Match-up Control	Synchronisation
Company	✓								✓				
Person	✓								✓				
Act. Target Group	✓								✓				
Contact	✓								✓	✓			✓
Repetition	✓								✓				
Contact Participant	✓								✓		Date > {curDay-3m}		
Comments	✓								✓				

2. Enable the **Synchronization** cell for the **Activity** info area.
3. Save the communication format and assign it to the desired communication connection(s), see [Defining Communication Connections](#).
4. Enable the **Synchronization** field in the communication connection(s).

Synchronization takes place at predefined intervals (value in the **Sync.Cycle (Days)** field defined for the target station).

The branch office only inputs records that meet the input conditions. Records on the branch office that do not meet the input conditions are automatically deleted during the input process. Records added on the target station that do not meet the input conditions are automatically deleted the next time data is input.

Synchronization and Stocks

Aurea CRM's stock management features () require all stock-relevant data to be present locally on all branch offices to track stocks correctly.

For details on stock management, see [Inventory Management](#) in the *Business Logic Manuals*.

This is taken into account when synchronizing:

- Orders (BTB, OTC), material orders (FS), Refunds (OTC) etc. are only deleted by the synchronization process if stocktaking has been performed.
- Companies and persons for which stock-relevant records exist (i.e. orders etc. that have not been subject to stocktaking) are not deleted by the synchronization process.

You can disable this behavior using the **No Inventory** configuration entry, see [Communication](#) in the *CRM.core Administrator Guide*. If this configuration entry is active, data that directly affects stocks is also deleted during synchronization.

Alternatively, you can completely disable stock management by locking the "Inventory Management" process (see [CRM Process Configuration](#) in the *CRM.core Administrator Guide*). This is the approach recommended by Aurea.

Communicating Deleted Records

Learn how to delete records on stations that do not communicate.

If a station does not communicate with any other stations, records are deleted immediately. Child records are also deleted immediately.

Exceptions:

- The station number has been changed: The **Added on StNo .** field (number of the station the record is added on) in the deleted record does not match the station number. In this case, the delete code (**DelCd** field) is enabled and the record is **not** deleted physically, as with communicating stations (see below).
- A value has been entered or imported into the **CmCd** field (communication code) of the record: The record is treated as having been communicated. The delete code (**DelCd** field) is enabled and the record is **not** deleted physically.

If you enable the **Do Not Communicate Deleted Records** option in the **Delete** info area (**Maintenance** module), records are deleted physically. Records are **always** deleted without setting the delete code, even if the **CmCd** field in the record is enabled, or a station other than the current station number is entered in the **Added on StNo .** field.

Deleting records on stations that communicate

On stations that communicate with other stations, records that have already been communicated (**CmCd** field enabled) are not deleted physically, but instead the delete code (**DelCd** field) is enabled. Child records are deleted immediately.

The delete codes are then communicated to other stations as part of the next communication session. Dependent records are also deleted immediately on these stations.

Once the delete code has been communicated to all stations and the stations have confirmed receiving the record, the record is deleted on the main office, see [Deleting Records Automatically](#).

If you want to prevent companies, persons and properties (BTB only) from being deleted when communicating, enable the **Deny Deletions > By external** option in the match-up control settings, see [Match-Up Control](#) on page 101.

Select **Data > Display Deleted Records** from the menu to display all records marked as deleted.

If the record has not yet been communicated, you can undelete the record by disabled the **DelCd** field in the record.

Disabling the **DelCd** field does not restore identical records marked for deletion on branch offices. Manually restoring records by changing the delete code can therefore lead to inconsistent data. A record can be present on one station, whilst marked for deletion or even physically deleted on another.

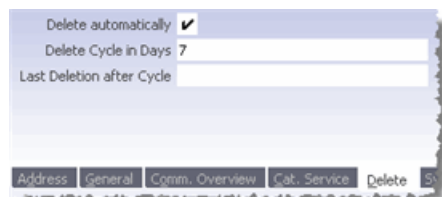
Note: Under no circumstances should records be deleted by enabling the **DelCd** field manually.

You can change the default behavior and determine that records are never deleted physically for specific info areas in the access rights (**Mark as Deleted** column). Instead of deleting the affected records, the delete code (**DelCd** field) is enabled in the record and the records are retained in the database even after communicating.

Deleting Records Automatically

The delete cycle determines when records are physically deleted on a station.

Define the delete cycle for each station on the **Delete** tab in the **Station** info area (see [Defining Stations](#)):



- **Delete Automatically:** Enable this check box to automatically (physically) delete records marked as deleted from the local database after the time period entered in the **Delete Cycle in Days** field has expired.
- **Delete Cycle In Days:** Once the time period entered here has expired (default: 7), records marked as deleted are deleted the next time records are communicated on this station.
- **Last Delete after Cycle:** The data on which records are last deleted is automatically entered here.

Records are deleted as follows:

1. A record is deleted on a station, the **DelCd** field is enabled.
2. The record is communicated to the other stations.
3. A delete prompt is displayed when starting the **Communication** module on communicating stations at the time determined by the entries in the **Delete Cycle in Days** and **Last Delete after Cycle**.
4. Answer the prompt with **Yes** to physically delete all records marked as deleted on this station (branch office).

Note: Always use the `-1` option when communicating automatically to ensure that the prompt is automatically confirmed, see [mmco.exe Parameters](#) on page 343 and [Automatic Communication](#) on page 125.

5. A record marked as deleted is only deleted on the main office once it has been physically deleted on all branch offices.

Communication logs from the last 12 months are used to determine whether the record can be deleted on the main office. If no receipt confirmation is received, the record is not deleted.

If a branch office confirms the receipt of a (new) data stock download, all prior communication logs for this branch office are ignored.

Deleting Logins on Branch Offices

Logins configured at the main office and communicated to branch offices cannot be deleted using the delete code as this does not delete the login record (**Login** (US) info area) on the branch office.

To delete logins on branch offices from the main office:

1. Switch to the desired record in the **Central Login Configuration** info area.
2. Delete the record.
3. Add a new record for the rep with the same login name.
4. Enable the **Remove login** check box on the **Password** tab.
5. Save.
6. The next time the main office communicates with the branch office the corresponding login record is deleted.

Communicating Catalogs

Learn about the fixed and variable catalogs.

Fixed catalogs are part of the data model and are therefore communicated automatically, see [Communicating Data Model Changes](#) in the *CRM.core Administrator Guide*.

Variable catalogs are stored in the **Catalog** info area, see [Catalog Info Area](#) in the *CRM.core Administrator Guide*. Catalog values can be added, edited and deleted in the **Catalog** info area, see [Editing Variable Catalogs](#) in the *CRM.core Administrator Guide*.

Changes to catalogs are stored in the **Catalog Maintenance** info area on the catalog maintenance station and are automatically transferred to other stations during communication, see [Automatic Catalog Maintenance](#) on page 140. The **Catalog Maintenance** info area is not updated on all other stations.

Note: Aurea recommends that you never add catalog values to the database directly, and that you prevent users from editing and deleting catalog values on all stations

other than the catalog maintenance station, see [Defining Access Rights for Variable Catalogs](#) in the *CRM.core Administrator Guide*.

If your communication hierarchy includes multiple tiers, stations on the second tier communicate catalog maintenance data to stations on the third tier etc.

When communicating, catalog values are matched up using the catalog value in the catalog base language and the tenant number. If catalog values can also be added on branch offices, new entries are communicated to the catalog maintenance station using the **Catalog** info area. The catalog maintenance station then communicates the changes to all other stations using the **Catalog Maintenance** info area.

Automatic Catalog Maintenance

The current status of catalogs is logged on the **Cat. Maintenance** tab in the **Station** info area for each station.

The system determines which catalog maintenance records need to be communicated to each station based on the entries in the **(Ext.) Cat.Maint . ID**, **(Ext.) Cat.Maint . Date** and **(Ext.) Cat.Maint . Time** fields.

Note: If this information is missing for a station, all catalog maintenance records are output the next time communication is initiated.

In this example, a few catalog values in the **Catalog** info area on the catalog maintenance station are edited (in this example the main office with station number 1):

1. Start the **Maintenance** module on the catalog maintenance station, see [Starting Modules](#) on page 13.
2. Switch to the **Catalog** info area, see [Catalog Info Area](#) in the *CRM.core Administrator Guide*.
3. Edit a few catalog values. (In this example, a value is added to the **Country** catalog, while an existing entry is edited and another deleted.)

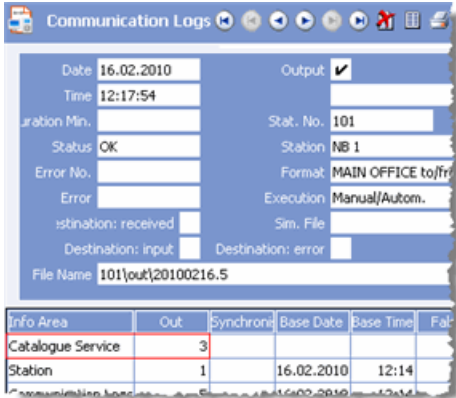
Corresponding records are added to the **Catalog Maintenance** info area:

KW ID	KW Catalog	KW Cat. No.	KW Modification	KW Text	KW Replaced
11	Country	2	N		Spain
12	Country	2	U	United States	USA
13	Country	2	L	Morocco	

These changes are communicated to branch offices (in this example "NB 1", station number **101**) by the catalog maintenance station. The catalog maintenance process is logged on the **Cat. Maintenance** tab in the **Station** info area.

1. Outputting on the Catalog Maintenance Station

The catalog changes are included in the next communication file generated by the catalog maintenance station, see [Output](#) on page 121.

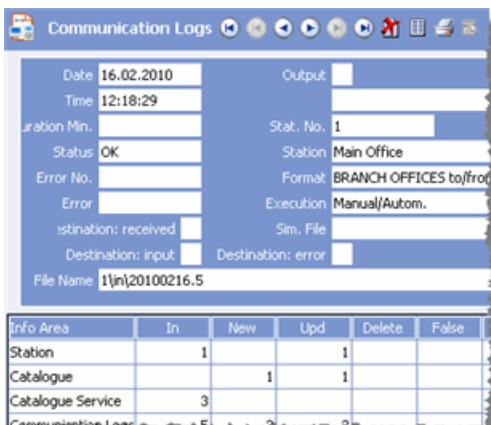


The **Cat. Maintenance** tab for stations 1 and 101 on the catalog maintenance station contains the following data after outputting the communication file:

	(Ext.)Cat. Maint . ID	(Ext.)Cat. Maint . Date	(Ext.)Cat. Maint . Time	(In.)Cat. Maint . ID	(In.)Cat. Maint . Date	(In.)Cat. Maint . Time
1	-	-	-	-	-	-
101	13	16.2.2010	12:17 (output to 1)	10	-	-

2. Inputting on the Branch Office

The catalog changes are applied to the branch office when the communication file is input, see [Input](#) on page 122. The catalog maintenance data is input first, and then the normal communication data.



The **Cat. Maintenance** tab for stations 1 and 101 on the branch office contains the following data after inputting the communication file:

	(Ext.)Cat. Maint . ID	(Ext.)Cat. Maint . Date	(Ext.)Cat. Maint . Time	(In.)Cat. Maint . ID	(In.)Cat. Maint . Date	(In.)Cat. Maint . Time
1	-	-	-	13	16.2.2010	12:18 (input to 101)
101	-	-	-	-	-	-

The notification file created when inputting the communication file confirms that the catalog values have been updated on the branch office, >> [Confirmation](#) on page 124.

3. Outputting on the Branch Office

The contents of the **Cat. Maintenance** tab for stations 1 and 101 on the branch office remain unchanged after outputting the communication file.

4. Inputting on the Catalog Maintenance Station:

The notification file is input as part of the next input process on the catalog maintenance station, see [Input](#) on page 122.

The **Cat. Maintenance** tab for stations 1 and 101 on the catalog maintenance station contains the following data after inputting the communication file:

	(Ext.)Cat. Maint . ID	(Ext.)Cat. Maint . Date	(Ext.)Cat. Maint . Time	(In.)Cat. Maint . ID	(In.)Cat. Maint . Date	(In.)Cat. Maint . Time
1	-	-	-	-	-	-
101	13	16.2.2010	12:17 (output to 1)	13	-	-

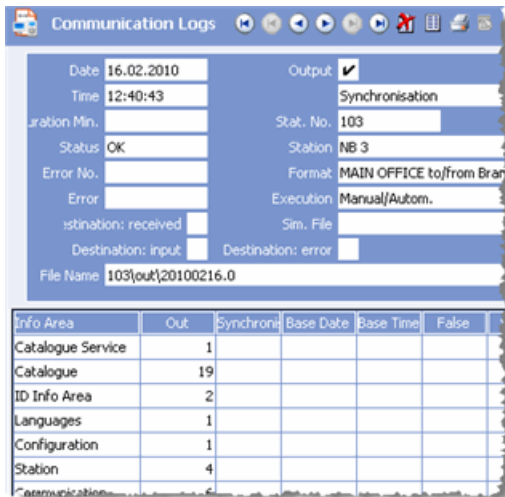
Once the **(Ext.)Cat . Maintenance ID** is the same as the **(In.)Cat . Maint . ID**, the catalogs on the branch office are up to date.

Note: The catalog maintenance station continues outputting catalog maintenance records (i.e. each time the station communicates) until a notification file is received confirming input on the other stations.

Catalog Maintenance and Data Stock Download

A data stock download only includes the most recent catalog maintenance record.

For further details, see [Data Stock Download](#) on page 117.



The ID of the last catalog maintenance record is sufficient to track the current status of catalogs on branch offices in the corresponding station records. All catalog values are output (**Catalog** info area).

You can use the `w` parameter to output all catalog values when communicating automatically ("catalog data stock download"), see [mmco.exe Parameters](#) on page 343. If you output data for several stations, and data has not previously been output for any of these stations (the corresponding fields are empty in the station records), a catalog data stock download is created automatically, even if you do not specify the `w` parameter.

Changing the Catalog Maintenance Station

To change the catalog maintenance station in a live system:

1. Ensure that the new catalog maintenance station contains up to date information on catalogs and catalog maintenance records, see [Automatic Catalog Maintenance](#) on page 140.
2. Disable the **Aut.Cat.Maintenance** check box in the station record of the old catalog maintenance station, see [Defining Stations](#).
3. Enable the **Aut.Cat.Maintenance** check box in the station record of the new catalog maintenance station.

Communicating Multi-language Catalog values

New catalog values should always be added in the catalog base language on the catalog maintenance station with translations entered in the corresponding columns.

For further details, see [Multi-Language Catalogs](#) in the **CRM.core Administrator Guide**.


If catalog values can also be added on other stations, they may not be added in the base language on those stations and need to be translated into the catalog base language on the catalog maintenance station.

In the following example, "Suisse" is added in French to the **Country** catalog on a branch office:

1. After inputting the communication file on the catalog maintenance station, the catalog value is displayed in the catalog base language's column in the **Catalog** info area:

The screenshot shows a software interface for catalog maintenance. At the top, there is a dropdown menu labeled 'Country (Rep)' and a text field containing 'records 8'. Below this is a table with the following structure:

Tenant	Lock	0001 English	Lock	0002 Deutsch	Lock	0003 Français	Lock	0004 Italiano
		Austria		Österreich		Autriche		
		France		Frankreich				
		Germany		Deutschland		Allemagne		
		Italy		Italien		Italie		Italia
		Spain		Spanien		Espagne		
		Suisse						
		United Kingdom		Großbritannien		Royaume-Uni		
		USA				États-Unis		

2. Click on the catalog value.
3. Click on  (**Edit**) and enter "Switzerland".
4. Click on **OK**.
5. Select **Apply Changes** from the context menu to apply the change to all records using this catalog value, see [Applying Changes to Catalogs](#) in the **CRM.core Administrator Guide**.
6. Enter translations in the other columns, see [Editing Variable Catalogs](#) in the **CRM.core Administrator Guide**.

The catalog value in all languages is communicated to branch offices the next time the catalog maintenance station communicates, see [Automatic Catalog Maintenance](#) on page 140.

Communication Logs

Communication logs are stored in the **Communication Logs** info area for each communication session and import for each station.

To display the communication logs:

1. Switch to the desired station in the **Station** info area in the **Communication** module.
2. Switch to the **Communication Logs** info area.

Communication logs are displayed for all communication sessions and imports involving the selected station. Records in the **Communication Logs** info area can only be deleted by the administrator (SU).

The communication logs contain information on the date, direction, communication format, errors etc. for each communication session. The number of records input or output is displayed for each info area in the table.

Info Area	Out	Synchroni	Base Date	Base Time	False	Sim F.	Denied
Station	3		12/02/2010	17:11			
Communication Logs	4		12/02/2010	17:11			
Distribution Logic	1		12/02/2010	17:11			
Company		7	12/02/2010	17:11			
Person		6	12/02/2010	17:11			
ID Info Area			12/02/2010	17:11			

Depending on the type of process (input, output, import), the table contains different columns:

Output

If the **Output** check box is enabled, records are output to the target station (**Stat. No.** field, in this case station 200) from the info areas listed in the **Info Area** column.

If synchronization information is output, "Synchronization" is displayed in the field below **Output**, see [Synchronization](#) on page 131.

Out: Number of records output.

Synchronization: Number of records that meet the conditions defined in the communication format, see [Synchronization Process](#) on page 133.

Base Date/Time: Time at which data is last output for the target station. All changes since this point in time are output.

Input

If the **Output** check box is disabled, records are input from the source station (**Stat. No.** field) in the info areas listed in the **Info Area** column.

Info Area	In	New	Upd	Delete	False	Sim F.	Denied
Station	2		2				
Communication Logs	6	3	3				
ID Info Area	10		10				
User Tracking	3		3				
Process tracking	36	33	3				

In: Number of records input.

New: Number of new records added.

Upd .: Number of updated records.

Delete: Number of deleted records.

False: Number of records rejected as false. The following records are rejected as false:

- Dependent records for which no parent record exists on the target station.
- Records marked as deleted that are not already present on the target station.

Sim F: Number of records written to the SIM file, see [Match-up Types](#) on page 103.

Denied: Number of unprocessed records. Unprocessed records are:

- Records marked as deleted that are already marked as deleted on the target station.
- Records that should not be input according to the communication format.
- After inputting changes to the data model ("new DM checked" is entered in the **Error** field), the data model format is rejected during the actual input process.

Import

A communication logs record is also added when data is imported, see [Logging the Import/Export](#) on page 82. In this case, "Import" is entered in the field below **Output**. The import format is entered in the **Format** field and the import file is entered in the **File Name** field.

Date	21/10/2009	Output	
Time	16:49:09	Import	
Duration Min.		Stat. No.	
Status	OK	Station	
Error No.		Format	IMP_FI
Error		Execution	Manual
Destination: received		Sim. File	
Destination: input		Destination: error	
File Name	d:\fi_1.csv		

Info Area	In	Match	New	Upd	Delete	False	Denied
Company	3		3				

Match: The number of records that are compared with existing data based on your match-up settings. The number of records actually changed as a result is displayed in the **Upd** column.

Result


The **Result** field (select **View > All Mask Fields** from the menu to access the field) contains a summary of the communication logs and can be output in an XML report, see [XML Format](#) in the *User Manual*.

The following fields in the **Communication Logs** info area contain information on the success or failure of the input/output procedure:

- **File deleted:** Boolean field. If true, the input file has been deleted. The communication file is automatically deleted from the IN directory if the input process is successful.
- If false, the input file is not deleted. The input process is terminated or the file may be corrupt, see [Troubleshooting](#) on page 162.
- **Error No.:** Number of any error that occurred, see [Communication Error Codes](#) in the *CRM.core Administrator Guide*.
- **Error:** A description of the error.
- **Status:** Status of the communication process (OK, Aborted, Error, Not relevant)
- **Retry date:** The date of the last retry.
- **Retry no.:** The number of times the system has retried outputting the file. The output process is repeated until the number of days entered in the **Days to reception** field in the **Communication** info area is exceeded, see [Automatically Repeating Communication](#).
- **Destination: received:** If this check box is enabled, the target station has received the output file (receipt confirmation).
- **Destination: input:** If this check box is enabled, the target station has input the output file (input confirmation).
- **Destination: error:** If an error occurred on the target station when inputting the file, the error number is written to the output logs on the source station, see [Communication Error Codes](#) in the *CRM.core Administrator Guide*.

Sending Communication Logs via E-mail

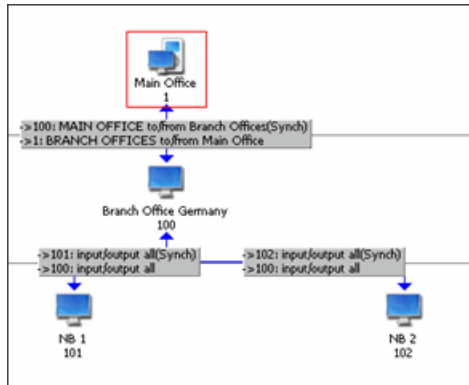
To send communication logs via e-mail:

1. Switch to the **Communication** info area.
2. Enable the **E-mail (Error)** and/or **E-mail (Ok)** fields for the desired connections to send logs via e-mail if errors occur or the communication is successful.
3. Click on  (**Rep List**) for each connection, and select the rep that should receive the logs. If no e-mail address is entered for this rep (in the **Rep** info area), the logs are not sent.

Note: This function requires an e-mail client that supports MAPI.

Station Overview

Stations and communication connections between stations are displayed graphically in the **Station Overview** info area



1. Right-click on the overview and select **Vertical**, **Horizontal**, **Pie Chart (Circular)** or **Centered** to change the appearance of the overview.
2. Select an entry from the **Info:** drop-down list (All Stations, Input/Output Date, Reminder Cycle, Failure) to display the selected information.

Station Icons



The station that you are currently logged on to.



The main office.

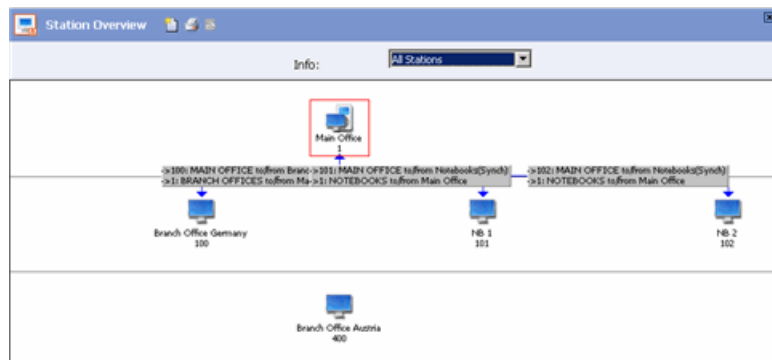


All other stations.

You can add stations and define new communication connections in the **Station Overview** info area, see [Adding Stations](#) and [Defining Communication Connections](#).

All Stations

Select "All Stations" from the **Info** drop-down list in the **Station Overview** info area to display all stations (including those for which no communication connections have been defined).



The text displayed for the connections contains information on the connection:

- Station numbers of the communicating stations.
- Communication formats used.
- "E-mail" is displayed if communication is conducted via e-mail, see [Communicating via E-mail](#) on page 128.
- "Synch" is displayed if synchronization is enabled, see [Synchronization](#) on page 131.

Double-click on the text to switch to the corresponding connection's record in the **Communication** info area, see [Communication Info Area](#) on page 113.

Double-click on a station to switch to the corresponding station's record in the **Station** info area, see [Station](#) on page 87.

Adding Stations

To define a new station in the **Station Overview** info area:

1. Click on  (**New**).



2. Select **New Station**.


The **Station** info area is opened in new mode.

3. Add the new station, see [Defining a Station](#) in the *CRM.core Administrator Guide*.
4. Save.

You are returned to the **Station Overview** info area and are asked if you want to add a communication connection, see [Defining Communication Connections](#).

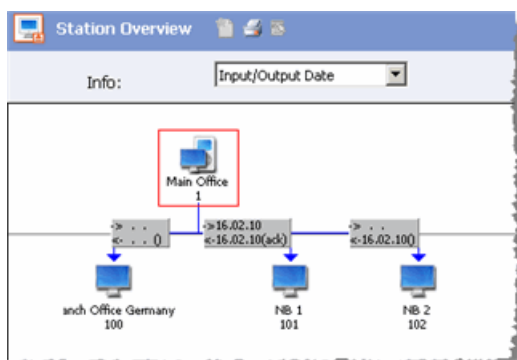
Adding a Communication Connection

To define a new communication connection in the **Station Overview** info area:

1. Click on  (**New**).
2. Select **New Communication**.
The mouse cursor changes.
3. Click on the source station in the overview.
A line is drawn between the station and the mouse cursor.
4. Click on the desired target station.
The **Communication** info area is opened in new mode.
5. Add the communication connection, see [Defining Communication Connections](#).
6. Save.
7. You are asked whether you wish to add a further communication connection.
8. Define the connection in the opposite direction.

Input/Output Date

Select "Input/Output Date" from the **Info** drop-down list to display when the stations for which a communication connection exists last communicated with one another.



The text displayed for the connections contains information on the connection:

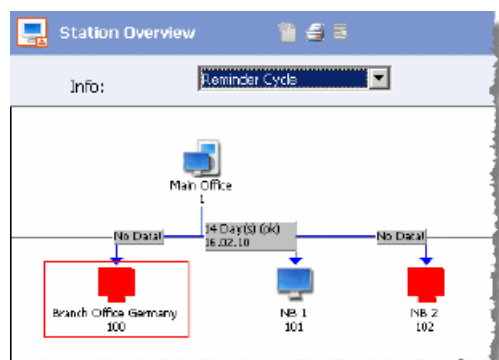
- First line: Date on which data is last input from this station.
- Second line: Date on which data are last output to this station.
- "inp" or "ack" is displayed for output processes if the target station has received the file or input it correctly.

Double-click on a connection's text to display the communication session's log in the **Communication Logs** info area, see [Communication Logs](#) on page 144.

Double-click on a station to switch to the corresponding station's record in the **Station** info area.

Reminder Cycle

Select "Reminder Cycle" from the **Info** drop-down menu to display which stations have exceeded the reminder cycle.



The reminder cycle interval is entered in the **Reminder Cycle Field in Days** in the **Communication** info area, see [Defining Communication Connections](#). A station must communicate within the time period entered here.

The connection texts containing the following information:

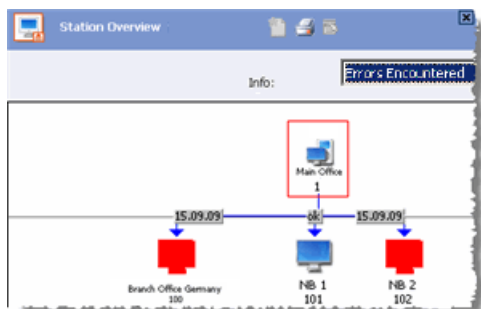
- The time period defined in the **Reminder Cycle in Days** field for this connection. If the station has communicated successfully within the defined time period, "ok" is displayed.
- If the specified time period has been exceeded without communicating, the station blinks and the date of the last input is displayed.
- If data has never been input from a specific station, the station blinks and "No data" is displayed.

Double-click on a connection's text to display the last communication session's log in the **Communication Logs** info area, see [Communication Logs](#) on page 144.

Double-click on a station to switch to the corresponding station's record in the **Station** info area.

Errors Encountered

Select "Errors encountered" from the **Info** drop-down list to display communication errors.



The connection texts containing the following information:

- Date: If an error occurred in the last 4 weeks, the date the error occurred is displayed and the station blinks.
- If no errors have occurred when communicating with a station, "ok" is displayed.

Double-click on a connection's text to switch to the corresponding communication log, see [Communication Logs](#) on page 144.

Double-click on a station to switch to the corresponding station's record in the **Station** info area.

Configuring Stations Automatically

You can largely automate the process of adding reps and their stations (offline stations) so that local administrators can set up users and stations for Aurea CRM web offline without requiring access to Aurea CRM win.

To do so, the following steps are required in Aurea CRM win:

1. Define communication formats used to communicate between the server and offline station, see [Communication Format](#) on page 89.
2. Configure the server to automatically add new offline stations, see [Configuring the Offline Server](#) on page 153.
3. Define station access rights for the offline stations and default values for the **Station**, **Central Login Configuration** and **Communication** info areas, see [Defining Access Rights and Default Values](#) on page 153.
4. Define the Z5 variable `update_OfflineSyncDefinition`, see [Defining a Synchronization Variable](#) on page 154.

Enable the **Offline user** field in the **Rep** info area to trigger the automatic creation of all necessary records required for the station (station, login, communication connections), see [Adding Offline Users](#) on page 154.

A data stock download is created the next time communication data is output, see [Configuring Offline Stations](#) on page 161.

Configuring the Offline Server

Define the station number range for offline stations in the station record of the server used to add and administrate offline users and stations.

To define station number range for offline stations, do the following:

1. Switch to the offline server in the **Station** info area.
2. Select **View > All Mask Fields** from the menu to display all fields and enter the desired number range in the **Offline Station No. from** and **Offline Station No. to** fields.

If you do not specify an upper limit, free station numbers up to 9,999 are assigned.

3. Save.

When automatically adding offline stations, the next free station number in the defined number range is assigned to the new station, see [Adding Offline Users](#) on page 154. If no station numbers are available, the process is canceled.

Further configuration is required on the server for Aurea CRM web offline users and stations, see [Aurea CRM web Offline Installation & Technical Guide](#).

Defining Access Rights and Default Values

Learn how to define access rights and set default value for the rights.

Define access rights and default values for the branch offices:

1. Define station access rights for the branch offices containing the necessary restrictions, see [Defining Access Rights](#) in the *CRM.core Administrator Guide*.
2. Define the necessary default values in the server's station access rights (see [Default Values when Adding Records](#) in the *CRM.core Administrator Guide*):
 - for the **Central Login Configuration** info area:
 1. Determine which modules should be available to offline users (e.g. **Aurea CRM** and **web**).
 2. Enter the server's station number in the **Template (Station No.)** field
 3. Save the default values.
 4. Click in the **Central Login Configuration's Create Default** cell again.
 5. Enable the **Manage password globally** check box.
 - for the **Station** info area: Select the **Station Access Rights** defined in step 1.
 - for the **Communication** info area: Select the communication format use to communicate between the **offline station and server** in the **Comm.Format**

field. If you have defined input conditions in the communication format used to synchronize data (see [Synchronizing using Input Conditions](#) on page 136), you also need to enable the **Synchronization** field.

3. Define any additional default values, triggers and workflows used to add records in these info areas.
4. Save the access rights.

When automatically adding offline users, stations and communication connections, corresponding records are added based on the defined default values, see [Adding Offline Users](#) on page 154.

Defining a Synchronization Variable

Define the variable `update_OfflineSyncDefinition` in the **Variable (Z5)** info area for the **Comm.Format** field in the **Communication** info area.

For further details, see [Variables](#) in the *CRM.core Administrator Guide*. Define a value that contains the name of the communication format used to communicate **between the server and offline station** (**Var. Text** field).

The variable must be defined so as to be applicable by all users that can add offline stations (e.g. a condition applied to the offline server's station number).

When automatically adding offline users, stations and communication connections, the communication format for the communication connection server -> offline station is read from this variable, see [Adding Offline Users](#) on page 154.

Adding Offline Users

Learn how to add an offline user and user's station.

To add an offline user and the user's offline station:

1. Switch to the desired rep in the **Rep** info area.
2. Enable the **Offline user** field (select **View > All Mask Fields** from the menu to access the field).
3. If no login record exists for the rep, you need to enter a **User name** (select **View > All Mask Fields** from the menu).
4. Save the record.
5. Aurea CRM automatically adds the following records:
 - A record in the **Station (AS)** info area for the new offline station:

If a station number is entered in the rep record (**Offline Station No.** field) and this station already exists, the existing station record is used. Exceptions: Main office, catalog maintenance station, current station, stations marked as deleted and stations where another rep is entered.

If a matching station is found, the offline user is entered as a rep and no new station is added.

Otherwise a new station is added: The next free station number in the number range is assigned to the new station, see [Configuring the Offline Server](#) on page 153. The station number is entered in the **Offline Station No.** field in the rep record.

If no station numbers are available, the process is canceled.

- One or more records in the **Station Languages** (01) info area, see [Offline Station Languages](#) on page 160.
- Two communication connections in the **Communication** (C1) info area: server -> offline station (communication format entered in the variable "update_OfflineSyncDefinition") and offline station -> server (communication format entered in the default values)

If one of the communication formats is missing, the corresponding record is not added.

If a corresponding communication connection already exists, the **Input** and **Output** fields in the record are enabled.

- If not already present (see above), a record is added to the **Login** (US) info area using the **User Name** entered in the rep record.
- Two records in the **Central Login Configuration** (ES) info area: One for the current station (server) and one for the offline station. The user name is taken from the offline user's login and rep records (see above), see [Default Values and Fallback Values for Offline Users and Stations](#) on page 156. The template's station number and all other values are taken from the default values you have defined, see [Defining Access Rights and Default Values](#) on page 153.

Note: If a login record (US) already exists for the rep, the values (including empty values) in this login record overwrite the default values when adding a new ES record for the current station (server).

The domain and Windows user in the ES record for the offline station can be edited despite a template station being defined (**Template (Station No.)** and optionally **Manage password globally**), and the domain and Windows user are not overwritten by the values in the main office's ES record if changes are made.

When adding records, the defined access rights are **ignored with the exception** of the default values. The default values also apply to the SU in this context.

If corresponding records exist, no new records are added. Existing records are not edited.

6. Aurea CRM enables the **Initialize offline station** in the offline user's rep record. This determines that a data stock download is automatically created for the offline

station the next time data is output, see [Configuring Offline Stations](#) on page 161. The field is automatically disabled once the output has taken place.

Note: When importing via CRM.cockpit, this function is **ignored**.

Default Values and Fallback Values for Offline Users and Stations

This topic has the list default and fallback values for offline users and stations.

Changes in the offline user's rep record (ID)

ID	Field in Rep info area	Source info area	Field	Comment
116	Initialize offline station			Automatically enabled when the Offline user field is enabled.
117	Offline Station No.	AS	Stat.No.	Transferred from the offline station's station record (see below).
118	Offline station	ID	Name	
119	user name	US	user name	If no login record is present and no value has manually been entered in the field in the rep record, the process is canceled.

2 new central login configuration records (ES) for the offline user

ID	Field in Central Login Configuration	Source info area	Field	Comment
9	Name	US, ID	User name	

New station record (AS) for the offline station

ID	Field in Station info area	Source info area	Field	Comment
0	Stat.No.			Generated automatically based on the number range defined for offline stations, see Configuring the Offline Server on page 153.
1	Directory	AS	Directory	
2	Main Office			Always left empty
3	Aut. Cat. Maintenance			Always left empty
6	Stat. Name	ID	Name	
7	Country	ID	Country	
8	Postal Code	ID	Postal Code	
9	City	ID	City	
10	Street	ID	Street	
11	Country Code	ID	Country Code	
12	Area Code	ID	Area Code	
13	Tel 1	ID	Tel 1	

ID	Field in Station info area	Source info area	Field	Comment
14	Tel 2	ID	Tel 2	
15	Fax	ID	Fax	
18	Com.Mon	AS	Com.Mon	
19	Com.Tue	AS	Com.Tue	
20	Com.Wed	AS	Com.Wed	
21	Com.Thu	AS	Com.Thu	
22	Com.Fri	AS	Com.Fri	
23	Com.Sat	AS	Com.Sat	
24	Com.Sun	AS	Com.Sun	
25	Mon Time1	AS	Mon Time1	
26	Mon Time2	AS	Mon Time2	
52	Sun Time4	AS	Sun Time4	
70	Delete automatically	AS	Delete automatically	
71	Delete Cycle In Days	AS	Delete Cycle In Days	
80	Verify the target station's number	AS	Verify the target station's number	
82	Sync.Cycle(Days)	AS	Sync.Cycle(Days)	
83	Sync.Date	AS	Sync.Date	
84	(Passive)Sync.Station	AS	(Passive)Sync.Station	

ID	Field in Station info area	Source info area	Field	Comment
85	(Passive)Sync.Date	AS	(Passive)Sync.Date	
86	E-mail addr.	ID	E-mail 1	
100	Desktop Format	AS	Desktop Format	
101	AS-TenNo	ID, AS	AS-TenNo	Search order: default values > ID > AS > tenant access rights
105	Default Telephone Profile	ID	Default Telephone Profile	
106	Telephone Profiles	ID	Telephone Profiles	
109	Rep ID	ID	Rep/Group ID	

Note: The data for the new station record is taken from the **current station's station record** or from the **offline user's rep record**.

2 new communication connections (C1)

ID	Field in Communication info area	Source info area	Field	Comments
0	Source Stat. No.	AS	Stat.No.	taken from the source station's station record
1	Dest. Stat. No.	AS	Stat.No.	taken from the target station's station record
3	Execution			Always "Manual/Autom."
4	Input			Always enabled
5	Output			Always enabled

ID	Field in Communication info area	Source info area	Field	Comments
6	Comm.format			Server -> offline station: taken from the variable 'update_OfflineSyncDefinition', see Defining a Synchronization Variable on page 154. Offline station -> server: taken from the default values, see Defining Access Rights and Default Values on page 153.
7	Synchronization			Server -> offline station: always enabled
8	E-mail	ID	E-mail 1	

Offline Station Languages

Learn about the languages generated when offline stations are automatically added.

When adding an offline station automatically, Aurea CRM generates the following station languages (**Station Language** (01) info area):

- The language assigned to the rep (**Language** field in the **Rep** info area) and its parent language (if applicable).
- The catalog base language.
- You can assign an additional language (and its parent language) to the station using the "update_OfflineLanguageCopy" variable:
 1. Define the variable "update_OfflineLanguageCopy" in the **Variable** info area for the **Language No.** field in the **Station Language** info area, see [Variables](#) in the *CRM.core Administrator Guide*.
 2. Select **Variable values** from the context menu and define a variable value with the desired language number (**Var. Number/Catalog** field). The variable must be defined so that it applies to all users that may add offline stations (e.g. apply a condition to the offline server's station number).

The language is assigned to the offline station when automatically adding an offline station.

Configuring Offline Stations

After automatically adding all necessary data, a data stock download is output the next time data is output for the offline station (i.e. you can start communication without needing to specify the `-u` parameter).

The **Initialize offline station** check box in the offline user's rep record is disabled once the data is output. All subsequent outputs thus generates "normal" communication files.

Setting up the offline station for Aurea CRM win is then identical to the process described in [Data Stock Download](#) on page 117.

When inputting a data stock download on the offline station, any existing data is deleted before the input process begins. Any older communication files that are present are also deleted.

Resetting existing offline stations

1. Enable the **Initialize offline station** in the offline user's rep record. (The **Offline user** field must also be enabled.)

When next outputting communication data for the station, a data stock download is created.

2. Output data from the offline station to the server before inputting the data stock download.
3. Input the data stock download. The database on the offline station is automatically deleted in the process.

Disabling offline users

If the **Offline user** check box in a rep record is disabled or if such a rep is deleted, the **Output** field in the corresponding communication connection (server -> offline station) is disabled automatically. Data is no longer output for the station.

The **Input** field remains enabled to be able to input the offline station's final data.

If a rep is set as **Inactive**, the **Offline user** field is also automatically disabled.

Troubleshooting

Troubleshooting communication issues.

Problems with Data Stock Downloads

Troubleshooting data stock downloads issue.

Data Already Present on Target Station

When inputting a data stock download on a branch office, Aurea CRM checks whether records are already present in the **Company, Person in Company** and **Property** (BTB only) info areas.

- If no records are present, the data stock download is input as per usual, see [Data Stock Download](#) on page 117.
- If records are present in one of these info areas, the + parameter is ignored, and records are match up during the input process, see [Input](#) on page 122.

Target Station not Present or has been Deleted

If the station record corresponding to the target station is not present on the target station itself or is marked for deletion, the input process takes place in two stages:

1. The **Stations, Communication, Languages, Formats** and **Catalog Maintenance** info areas are input, and a log file is created (the communication file is not deleted).
2. The remaining records are input.

Outputting a new Data Stock Download for an Existing Station

To output a data stock download for a station that is already in operation:

1. Delete all communication logs referring to the target station on the main office.
2. Switch to the target station in the **Station** info area.
3. Delete the contents of the **Last Output Date** and **Last Output Time** fields.
4. Start the **Communication** module with the following command line (see [mmco.exe Parameters](#) on page 343):

```
mmco.exe -u com -p <Password> -k o,101,r
```

A data stock download is generated for station number 101. Only the most recent catalog maintenance record is included, see [Communicating Catalogs](#) on page 139.

5. Transfer the communication file to the target station and input it as follows:

```
mmco.exe -u com -p <Password> -k i,1,+
```

Note: Only input the communication file that contains the data stock download. Do not input communication files from previous communication sessions.

Partial Data Stock Download

You can create a data stock download that only contains data from specific info areas:

```
mmco.exe -u com -p <Password> -k o,101,u:FI:KP:MA
```

The above example generates a partial data stock download for station number 101:

- All records in the specified info areas (**Company, Person in Company, Activity**) are output (according to the settings in the communication format or distribution logic).
- All child records of these companies, persons and activities are also output, provided that **Output** is enabled for the child info areas in the communication format, see [Defining a Communication Format](#) on page 90.
- Only those records that have been changes since the last communication session are output from other info areas – as for "normal" communication sessions.

Input the partial data stock download as for the full data stock download:

```
mmco.exe -u com -p <Password> -k i,1,+
```

If you create a partial data stock download that only includes dependent info areas (e.g. - u :MA:BR for activities and mailings), the records are assigned to their parent records (in this case companies and persons) during the import process. If the parent record cannot be found in the local database, the record is rejected as false, see [Communication Logs](#) on page 144.

Also output the **Format** (FT) info area in partial data stock downloads if the info areas in the data stock download can contain formats. This prevents data inconsistencies.

Failed Communication Sessions

Learn how to troubleshoot failed communication session.

You need to generate the communication file anew in the following situations:

- If the communication process is aborted (e.g. one of the communicating stations crashed).
- If an erroneous communication file cannot be input. Error codes (in the communication logs) provide information on the cause of the error, see [Communication Error Codes](#) in the *CRM.core Administrator Guide*.
- If a communication file is not transferred successfully.

If the source station has not received confirmation that the communication file has been input on the target station within the time period defined in the **Days to reception** field (see [Confirmation](#) on page 124), the communication process is treated as having failed, and the communication file is automatically output again, see [Automatically Repeating Communication](#).

You can also repeat the communication process manually to resolve these problems, see [Manually Repeating Communication](#).

Automatically Repeating Communication

If the source station has not received confirmation that the communication file has been input on the target station within the time period defined in the **Days to reception** field (see [Confirmation](#) on page 124), the communication process is treated as having failed, and the communication file is automatically output again.

- The system determines which records need to be output again based on the communication logs on the source station. Logs older than 6 months are ignored.
- The format entered in the communication logs must be selected in the current communication connection, i.e. communication is only repeated for formats which are in current use.
- For each communication connection and format, a "repetition file" is output, unless the communication file originally sent is still available and not older than 7 days.
- The new communication file is named according to the current date. This ensures that files are input on the target station in the correct order.
- New communication logs are added for any "repetition files". The status of unconfirmed communication logs is set to "not relevant" and these are no longer taken into account by the system.

If the data models on both stations are not identical (error 46), the communication process is also repeated automatically, see [Outdated Data Model at Branch Offices](#).

Outdated Data Model at Branch Offices

If a branch office communicates with the main office and the data model on the branch office is outdated, the data in the communication file may not be input on the target station (e.g. if fields and info areas in the data model have been deleted on the target station). Instead, the file is moved to the ERR directory.

The input process' communication log is assigned the **Status "Error" (Error No. 46)**. The notification file requests that the data be resent by the branch office.

The main office automatically outputs the current data model for the target station in the next communication process, see [Communicating Data Model Changes](#) in the **CRM.core Administrator Guide**.

When inputting the file on the branch office, the data model is updated first. Once the input process is complete, all changes since the last successful outbound communication process are output. The new communication file therefore includes both the changes in the communication file rejected by the main office **and** all changes made since then on the branch office.

Once the communication file is successfully input on the main office, the error has been resolved and the communication file that caused the error can be deleted from the ERR directory.

Once the branch office has input the confirmation receipt from the main office, the **Status** of the log referring to the failed communication session is set to "not relevant" on the branch office. The **Destination: received** and **Destination: input** fields are enabled and the date of the new output process is entered in the **Retry date** field.

As of versions 7.0.6.214 and 7.0.7.72, branch offices also automatically output their data model. Based on this information, data in info areas that have been changed in the data model on the target station can also be input, provided no fields or info areas have been deleted.

Manually Repeating Communication

To manually repeat a failed communication session:

1. Search for the last successful output process in the **Communication Logs** info area on the source station (**Status**: OK).
2. Navigate to the penultimate output to the affected target station.
3. Make a note of the values in the **Date** and **Time** fields.
4. Switch to the target station in the **Station** info area.
5. Enter the values you noted down into the **Last Output Date** and **Last Output Time** fields.
6. Output the file for the target station again.

A communication file containing all missing records since the last successful communication session is created.

Error Accessing the Temporary Communication File

Learn to troubleshoot errors thrown while accessing the temporary communication file.

Access to temporary communication files (*.part) can be denied if the file is being used by another application or your anti-virus software.

This error is logged at log level "Error" or above in the <User>_6.log file in the \system\ db directory (see [Logs and Error Messages](#) in the *CRM.core Administrator Guide*):

```
...com-out: tmp-file:'%s', cannot open"...
```

%s: Name of the temporary communication file.

Rectify the problem and repeat the output process.

Communication between Different Aurea CRM win Versions

Aurea does not recommend communicating between different release versions or service packs.

WWW Interest Info Area

WWW interest records cannot be communicated between versions containing the **WWW Interest** info area and versions not containing the **WWW Interest** info area.

In this case, communication is only possible between identical versions (same release and service pack).

Events Info Area

The **Events** info area is an independent info area that can be linked to the **Marketing Activity** info area, >> Events in the User Manual. Event records cannot be communicated between versions containing the **Events** info area and versions not containing the **Events** info area.

In this case, communication is only possible between identical versions (same release and service pack).

Inputting Communication Files from Version 7.0.03 in Version 7.0.02

Prior to version 7.0.02.63

Communication files input from version 7.0.03 are rejected. The communication file is moved to the ERR directory, see [Directory Structure](#).

From version 7.0.02.63

Communication files input from version 7.0.03 are rejected. The communication file is retained in the IN directory and can be input after installing Service Pack 3.

Inputting Communication Files from Versions 7.0.01 and 7.0.02 in Version 7.0.03 in Version 7.0.03

Communication files are input. The synchronization request is generated in a format that can be input on stations using version 7.0.01 or 7.0.02.

Error Messages

Learn how to troubleshoot different error messages.

Error Messages in the Station Info Area

Missing communication x -> y.

No communication connection has been configured from station x to station y.

- Define the communication connection, see [Communication Info Area](#) on page 113.

No input files found

The IN directory does not contain any communication files to be input on this station.

- Transfer the communication files to the target station, see [Transferring Communication Files](#) on page 122.
- Ensure that the communication files are stored in the correct IN directories on the target station.

Error Messages in the Communication Info Area

Already Exists

This error occurs if you try and add a communication connection between stations for which a connection has already been defined. Note that records marked for deletion but not yet physically deleted are also taken into account.

- Use an existing connection.
- Only one communication connection can be defined for each execution type.

Communication format missing or faulty

Enter a communication format for the connection or define a new one, see [Defining Communication Connections](#) and [Defining a Communication Format](#) on page 90.

Destination is Station No. x. Communicate anyway?

The communication file being input is meant for another station. This error only occurs if the **Verify the target station's number** option is enabled in the target station's record and you are inputting the communication file manually, see [Defining a Station](#) in the *CRM.core Administrator Guide*. Otherwise the (possibly incorrect) data is input without a prompt.

Common Error Messages in the Communication and Station Info Areas

No destination defined in mask

The IN directory contains a file that is not a communication file (e.g. a text document).

Data error in input file

The communication file you are trying to input is faulty. Communication logs **Status:** "Error".

Repeat the output process, see [Failed Communication Sessions](#) on page 163.

Automatic Communication Error Messages

Errors that occur during automatic communication are written to the file <USER>_6.log in the \system\ db directory, see [Logs and Error Messages](#) in the *CRM.core Administrator Guide*.

If automatic communication is aborted, the message "No station to communicate with found. Current station no. is 1" is written to the log file.

- Verify whether communication is enabled for the current day of the week in the station record of the target station, see [Defining a Station](#) in the *CRM.core Administrator Guide*.
- Verify that a connection has been defined with the target station and whether the **Output** option is enabled for the connection, see [Defining Communication Connections](#).

4

User Interface

You can customize Aurea CRM's interface to reflect your company's processes and the needs of your users.

The following options are available:

- Users can configure the appearance of Aurea CRM by selecting **View > Desktop Properties** from the menu, see [Configuring the Display](#) in the User Manual. Settings are automatically saved for each user in a format of the type "User Settings", see [Formats](#) in the User Manual.

You can deny users access to these options in the interface settings, see [User Rights Tab](#) on page 241.

- Users can select **Extras > Other Options** from the menu to configure settings relating to the header icons and popup notifications displayed for reminders and messages, see [User Interface](#) in the *User Manual*. These settings are saved for each user in the `mm.cfg` file.

You can deny users access to these options in the desktop settings, see [Configuring Menus](#) on page 222.

- Users can display data in mask and list view, configure lists, load custom masks etc., see [Masks](#) and [Lists](#) in the *User Manual*. These settings are saved for each user and module in the `pro*.cfg` files in the user directories. List settings can also be saved as formats.

You can prevent users from loading user-defined list settings for specific levels in the desktop settings (**Level Properties > Mask/List > Do not load last settings**).

- Users can save dashboards as formats, see [Dashboards](#) in the User Manual.

You can deny users access to the dashboard menu option in the desktop settings, see [Configuring Menus](#) on page 222.

- Use the Mask Generator to create and edit masks and lists, see [Mask Generator](#) on page 169. Masks and lists are saved as formats.
- Use the desktop settings to configure elements in the user interface, levels and info areas, as well as to define new levels, see [Desktop](#) on page 214. These settings are saved in formats.

Use access rights to prevent users, groups or stations from defining new levels, and accessing the Mask Generator and desktop settings, see [Defining Further Settings](#) in the *CRM.core Administrator Guide*.

Note: User-specific settings take precedence over dashboard and desktop settings.

Mask Generator

Use the Mask Generator to create and edit masks and lists in Aurea CRM win.

Masks and lists are saved as mask formats and can be integrated in desktop formats.

You can prevent users, user groups or stations from accessing the Mask Generator using access rights, see [Defining Further Settings](#) in the **CRM.core Administrator Guide**.

For more information on masks and lists, see [Masks](#) and [Lists](#) in the *User Manual*.

General Approach

Learn about the general approach for defining masks in the Mask Generator.

The general approach when defining masks in the Mask Generator is as follows:

1. Switch to the level whose mask/summary index card/list you wish to edit.
2. Select either **Extras > Edit Mask** or **Extras > Edit Summary Index Card** from the menu.

Note: These options are disabled if **View > All Mask Fields** has been selected in the level. If a mandatory mask has been defined for a level (see [Masks/Lists Tab](#) on page 252), only the SU can access the Mask Generator for that level.

The mask or list is displayed in the Mask Generator.

Select **File > New Mask** from the menu to define a new mask, see [Defining a New Mask](#) on page 173 and [Defining a New List](#) on page 173.

3. You can:
 - Edit the mask properties, see [Mask Properties](#) on page 175.
 - Edit existing elements, see [Resizing and Moving Elements](#) on page 178 and [Element Properties](#) on page 182.
 - Add new elements, see [Adding Elements](#) on page 179.
 - Delete elements, see [Deleting Elements](#) on page 181.
 - Layout the mask automatically, see [Automatic Layout](#) on page 208.

4. Select **File > Save** to save the mask, see [Saving, Loading and Deleting Formats](#) in the *User Manual*.
5. Select **File > Close and Test** to close the mask generator and to display the mask in the current level. Changes that have not been saved are still applied to the current mask, but is not present if the mask is loaded.

Select **File > Exit** to close the mask generator and to revert to the previous mask. Changes that have not been saved are lost.

Select **View > Load Mask** or **View > Load SIC** from the menu in the Aurea CRM win main module to load a previously defined mask, list or summary index card.

Select **View > Original Mask** or **View > Original Pre. Mask** to load the mask, list or summary index card defined for the level in the desktop settings.

Note: Mask formats are saved for specific info areas. You can only load a mask if the current level contains the corresponding info area.

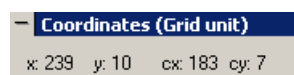
You need to install the corresponding Windows language packages (in the regional settings) to be able to use double byte characters in masks and lists.


If you edit an original mask, all masks that are loaded using buttons in the mask also need to be redefined. For example, if you edit the **Company Search** mask, you also need to save the extended search mask and enter it as the target for the **Extended Search** button. Otherwise no mask is loaded when you click on the button.

Toolbars

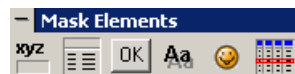
The Mask Generator includes the following toolbars:

- **Coordinates**



This toolbar displays the coordinates of the mask or currently active element in either pixels or grid units. To switch between pixels and grid units, click on the  symbol at the top left of the toolbar and select either **Pixel** or **Grid Unit** from the menu.

- **Mask Elements**



This toolbar contains buttons used to add elements to the mask, see [Adding Elements](#) on page 179.

You can also add elements using the **Elements** menu.

- **Mask Toolbar**



This toolbar contains the following buttons: **Load mask**, **Save mask**, **Save mask as...** and **New mask**.

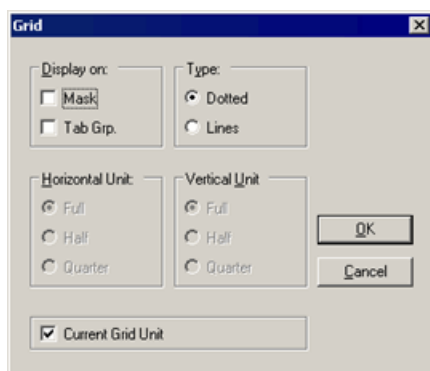
These options are also available from the **File** menu.

You can hide and show the toolbars using the **View** menu.

Grid Units

Use the **Grid** window to determine whether and how the grid is displayed on the mask to help you position elements. The settings in this window only affect the grid lines and have no effect on the units used for positioning elements. The grid units used to position elements are defined in the **Mask Properties** window (**Horizontal Grid** and **Vertical Grid** panes), see [Mask Properties](#) on page 175.

Select **View > Grid** from the menu to open the **Grid** window.



- **Display on:** Use these options to determine whether the grid should be displayed on the mask and tabs groups.
- **Type:** Grids can be displayed as either **Dotted** lines or solid **Lines**.
- **Horizontal Unit / Vertical Unit:** Defines whether the distance between the grid lines should be the entire, half or quarter of the font width. The font used to determine the size is taken from the following:
 - For masks, the largest font defined for either field names or contents is used. These fonts are defined in the following areas:
 - Mask Properties** window, **Text** and **Contents** fields.
 - Tab Group Properties** window, **Field Text** and **Field Contents** buttons.
 - For column type lists (see [Defining a New List](#) on page 173), the larger of the fonts defined for the list header and cell contents (**List Properties** window, **Header Font** and **Cell Font** buttons).
 - The following values are valid for mask type lists (see [Defining a New List](#) on page 173):
 - Font Width: Taken from the cell font (**List Properties** window, **Cell Font** button)
 - Font Height: The value entered in the **Minimum** field under **Horizontal grid** in the **List Properties** window. If this value is smaller or equal to 0, the cell font size is used instead (**Cell Font** button).

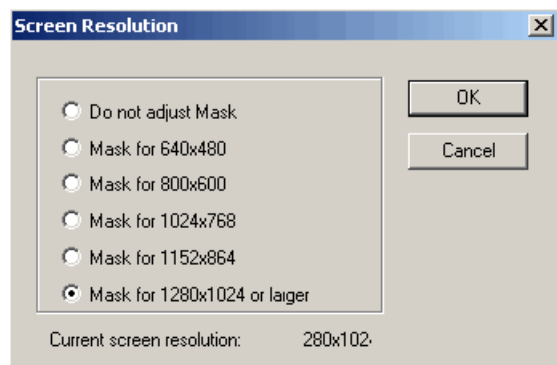
Grid units cannot be smaller than the specified minimum value (**Minimum** field in the **Horizontal Grid** and **Vertical Grid** panes).

- **Current Grid Unit:** Enable this check box to use the grid units defined in the **Mask Properties** window.

Screen Resolution

The current screen resolution is used automatically when defining a mask. If problems occur displaying the mask, open the **Screen Resolution** window to display the resolution the mask is defined with.

Select **Options > Screen Resolution** to open the **Screen Resolution** window.



The following options are available:

- **Do not adjust mask:** The mask is not adjusted and is always displayed in the same size.
- Available screen resolutions:
 - If no changes are made, the resolution the mask is defined for is used.
 - If you select a lower resolution (e.g. 640x480 instead 1280x1024), the mask size is scaled down accordingly.
 - If you select a higher resolution, the mask size is scaled up accordingly.

Use 640x480 for masks that should work under all resolutions.


Masks are only adjusted to the screen resolution if the **Full Screen Mask** option is enabled in the interface settings of the current desktop format, see [Masks Tab](#) on page 234 (**General** pane).

Note: For an optimal conversion between resolutions, enable the **Field text** and **Field contents** check boxes under **Length in Grid Units** in the **Mask Properties** window when defining a new mask.

Defining a New Mask

Learn how to define a new mask.

To define a new mask:

1. Switch to the level you wish to define a new mask for.
2. Click  (**Mask**) to switch to mask view.
3. Select either **Extras > Edit Mask** or **Extras > Edit Summary Index Card** from the menu.


The Mask Generator is opened.

4. Select **File > New Mask** from the menu.
5. Configure the mask properties, see [Mask Properties](#) on page 175.
6. Add the desired elements, see [Adding Elements](#) on page 179.
7. Save the mask format.


Defining a New List

Learn to define a new list.

To define a new list:

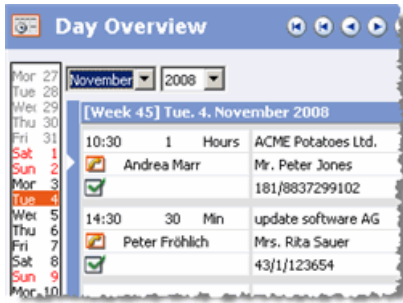
1. Switch to the info area for wish to define a new list for.
2. Click  (**List**) to switch to list view.
3. Select **Extras > Edit Mask** from the menu.

The Mask Generator is opened.

4. Select **File > New Mask**.
5. Configure the mask properties, see [Mask Properties](#) on page 175.
6. Click on  (**List**).

The **New List** window is displayed.

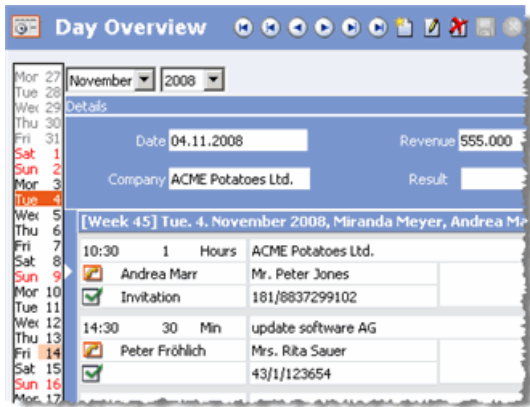
7. Select the type of list:
 - Select **Mask type** to display a list of records with individual masks for each record.



- Select **Column type** to define a standard list.

Company	Country	ZIP	City	Gen	Acad. Title	Last Name	First Name
ACME Potatoes Ltd.	UK	NW 2 3F	London	Mr.		Smith	John
Smith Consulting Ltd	UK			Mr.		Smith	John
Quick Services Ltd.	UK		London				
Twisted Taxis	UK		Peterborough	Mr.		Crowley	Isaac
New Meaning Communications Ltd.	USA		Minneapolis	Mrs.		Cartwright	Angela

- Click on **OK**.
- Configure the list properties, see [List Properties](#) on page 196.
- Configure any further settings:
 - For column type lists: Select **Options > Define List Format**, see [Defining Lists](#) in the User Manual.
 - For mask type lists, see [Defining Mask Type Lists](#).
- You can also include mask elements (e.g. a tab containing fields) in the list, as in the following mask list:





The company search is an example of a column type list that includes mask elements.

Note: The individual elements (fields, tabs etc.) can only be added to the mask outside of the list element.

- Save the mask format.

Defining Mask Type Lists

To define a mask type list:

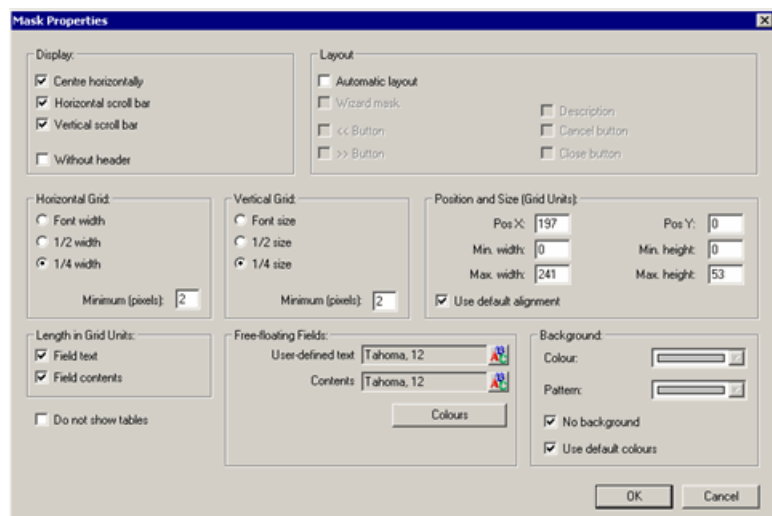
1. Switch to the info area for you wish to define a new list for.
2. Click  (**List**) to switch to list view.
3. Select **Extras > Edit Mask** from the menu.
The Mask Generator is opened.
4. Select **File > New Mask**.
5. Configure the mask properties, see [Mask Properties](#) on page 175.
6. Click on  (**List**).
The **New List** window is displayed.
7. Select **Mask type** and confirm with **OK**.
8. Configure the list properties, see [List Properties](#) on page 196.
 - Enter the desired **Row height** under **Rows and Columns**.
 - Click on **Header** or **Total Line** to define the desired **Height** of these elements.
You can also determine whether the header or total line is displayed as a **User-defined text** or **Mask**, see [Header Properties](#) on page 200 and [Configuring the Total Line](#) on page 200.
9. Select **Options > List Sub-unit > Header/Line/Total Line** to define masks for these elements.
10. Add the desired fields.
11. Select **Options > Mask Properties** to define the font type and size etc. used by field names and field contents, as well as the units used to determine the length of texts and fields (grid units or characters).
12. Select **Options > Mask** to return to the list.
13. Save the mask format.

Mask Properties

Learn how to set mask properties.

To open the **Mask Properties** window:

- Select **Options > Mask Properties** from the menu (Alt+Enter keyboard shortcut).
- Click on the mask to select it, and select **Elements > Properties** from the menu.
- Double-click on the mask.
- Right-click on the mask and select **Properties**.



The following settings can be defined in the **Mask Properties** window:

Display

- **Center horizontally:** The mask is centered horizontally within the level.
- **Horizontal scroll bar:** Determines whether a horizontal scroll bar is displayed if the window containing the mask is smaller than the value in the **Max. width** field.
- **Vertical Scroll Bar:** Determines whether a vertical scroll bar is displayed if the window containing the mask is smaller than the value in the **Max. height** field.
- **Without header:** Enable this option to minimize the header. The header can be opened by double-clicking on it.

Layout

The options in the **Layout** pane apply to the automatic layout function, see [Automatic Layout](#) on page 208.

Horizontal Grid

Use these settings to define the horizontal grid units, see [Grid Units](#). These values are used when an element is placed or moved on the mask.

- **Font width:** The font width is used as the horizontal grid unit.
- **½ width:** Half the font width is used as the horizontal grid unit.
- **¼ width:** A quarter of the font width is used as the horizontal grid unit.
- **Minimum (pixels):** Determines the minimum size of the horizontal grid units in pixels.

Vertical Grid

Use these settings to define the vertical grid units, see [Grid Units](#). These values are used when an element is placed or moved on the mask.

- **Font size:** The font height is used as the vertical grid unit.
- **½ size:** Half the font height is used as the vertical grid unit.

- **¼ size:** A quarter of the font height is used as the vertical grid unit.
- **Minimum (pixels):** Determines the minimum size of the vertical grid units in pixels.

Position and Size (Grid Units)

These options determine the size and position of the mask.

- **Pos X:** Horizontal distance of the mask from the left border of the window. If the **Center horizontally** check box is enabled, this value is determined automatically by the system.
- **Pos Y:** Vertical distance of the mask from the top border of the window.
- **Min. width:** The minimum width of the mask in grid units.
- **Min. height:** The minimum height of the mask in grid units.
- **Max. width :** The maximum width of the mask. A scroll bar is displayed if this value exceeds the size of the window (and the **Horizontal scroll bar** check box is enabled).
- **Max. height :** The maximum height of the mask. A scroll bar is displayed if this value exceeds the size of the window (and the **Vertical scroll bar** check box is enabled).

Note: The optimum values are calculated upon exiting closing this window. Select **Options > Adjust Mask Size (F7)** from the menu at any time to reduce the size of the mask to the minimum size to fit all elements.

- **Use default alignment:** The horizontal and vertical positions of the mask are taken from the desktop settings, see [Masks Tab](#) on page 234 (**General** pane).

Length in Grid Units

These settings determine whether grid units are used for the length of field names and field contents.

- **Field text:** Enable this option to calculate the length of field names in grid units.
- **Field contents:** Enable this option to calculate the length of field contents in grid units.

If the check boxes are disabled, the number of characters is used to determine the length instead.

Do not show tables

Enable this option to prevent tables from being displayed, e.g. to disable the table containing the times in the **Contact Times** info area (FS and OTC only).

Free-floating Fields

These settings apply to fields that are placed directly on the mask (i.e. outside of a tab group).

- **User-defined text:** The font type, size etc. used for field names.
- **Contents:** The font type, size etc. used for field contents.
- **Colors:** Click on this button to select from a number of predefined color schemes.

Background

- **Color:** Color of the mask.
- **Pattern:** Background pattern.
- **No background:** Enable this option to ignore the **Color** and **Pattern** settings.
- **Use default colors:** Enable this option to use the color settings defined in the current desktop format, see [Colors Tab](#) on page 224 and [Skins Tab](#) on page 226.

Resizing and Moving Elements

Learn to resize and move elements.

Resizing the Mask

The black frame represents the outline of the mask. Select **Options > Mask Properties** or double-click on the mask to enter the size in the **Max Width** and **Max Height** fields. Alternatively, drag the squares at the corners of the mask to the desired position.

Select **Options > Adjust Mask Size (F7)** from the menu to reduce the size of the mask to the minimum size to fit all elements.

Resizing Elements

1. Click on an element to select it.
2. Click on the squares at the corners and use the mouse to drag the element to the desired size.

This method cannot be used to alter the size of icons and lists.

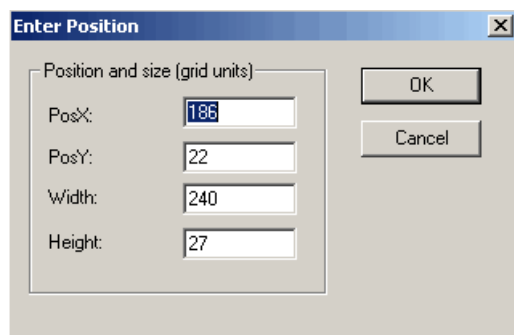
Resizing Lists

Double-click on the list and edit the size of the list in the **List Properties** window, see [List Properties](#) on page 196.

Repositioning Elements

To reposition an element within the mask:

- Drag it to the desired position with the mouse.
- Click on the element and use the cursor keys to move it.
- Click on the element and select **Elements > Enter Position** from the menu.



- **PosX** : Distance from the left border of the mask.
 - **PosY** : Distance from the top border of the mask
 - **Width**: Width of the element
 - **Height**: Height of the element
- Right-click on the element and select **Enter Position** from the popup menu.

An element cannot be placed on another element (exception: tab groups, see [Tab Groups](#) on page 201).

When moving a tab group, all tabs in the group are moved.

Note: Use the Esc key to cancel resizing and moving an element.

Adding Elements

Learn how to add elements.

To add an element:

1. Use the **Elements** menu (**Field**, **Tab**, **Button**, **Text**, **Icon** and **List** options).

Or click on one of the following buttons in the **Mask Elements** toolbar:



New field, see [Adding Fields](#)



New tab



New button, drop-down list or list field



New text

Note: Text elements are not suited to tab groups. Use text fields to define different text elements for different tabs in a tab group, see [Adding Fields](#).



New icon



New list, see [Defining a New List](#) on page 173.

Note: You can only define one list per mask.

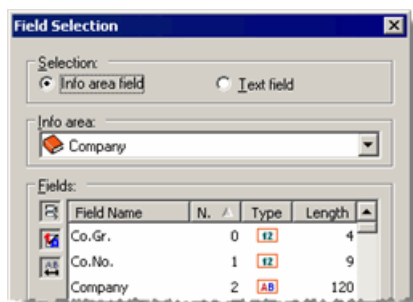
2. Click on the desired position in the mask.
3. Enter the desired element properties, see [Element Properties](#) on page 182.
4. Click on **OK**.

Adding Fields

To add a new field:

1. Click on  (**Field**).

The **Field Selection** window is displayed:



2. Select the field type:
 - **Info area field:** Select this radio button to include a database field. Select the info area from the **Info area** drop-down list and the field from the **Fields** list.

Note: If you are adding a field to the search or match-up masks for companies, persons or properties, two entries are available for each info area in the **Info area** list. Select the entry ending with (**Mask**). Otherwise, the fields in the mask cannot be edited.



- **Text field:** Use this option to add static text to a tab.

3. Click on **OK**.
4. Click on the desired position in the mask.

The **Field Properties** window is displayed, see [Field Properties](#) on page 182.

Note: Users can only add those fields that they are allowed to access according to their access rights, see [Defining Rights at the Field Level](#) in the **CRM.core Administrator Guide**. The same field can be added to a mask several times.

Deleting Elements

Learn how to delete elements.

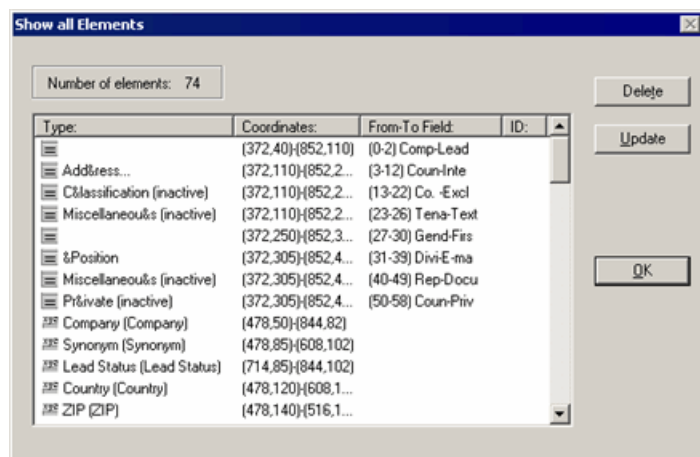
You can delete elements as follows:

- Click on the element and select **Elements > Delete** from the menu.
- Right-click on the element and select **Delete** from the popup menu.
- Click on the element and press the Del key.

Listing all Elements

Learn how to display all elements in the mask.

Select **Options > Show all Elements** from the menu to open a window displaying all elements in the mask:



- **Type:** Icon indicating the type and name of the element. Concealed tabs in a tab group are indicated with "(inactive)".
- **Coordinates:** Coordinates of the element.
- **From-To Field:** The number range of the fields in a tab group is displayed next to tab groups, see [View Tab](#).
- **ID:** Button IDs are displayed in this column, see [Button Properties](#) on page 188.

Select an element and click on **Delete** to delete it. Click on **Update** to edit the element's properties.

Select an element and click **OK** to select the element in the mask.

Element Properties

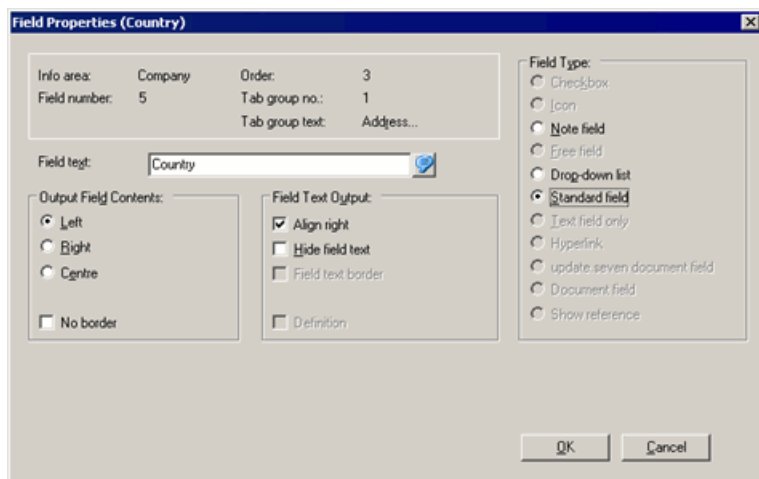
Upon adding a new element, the element's properties are displayed.

To display the properties of an existing element:


- Click on the element and select **Elements > Properties** from the menu.
- Double-click on the element.
- Right-click on the element and select **Properties**.
- Click on the element and press Alt+Enter.

Field Properties

A field's properties are defined in the **Field Properties** window.



The **Field Properties** window fields are defined below:

- **Info area:** Name of the info area containing this field.
- **Field number:** Field number
- **Order:** Tab order of the field in the mask.
- **Tab group no.:** The number of the tab the field has been assigned to, if applicable.
- **Tab group text:** Name of the tab
- **Field text:** Name of the field. Click on  (**Multi-language Input**) to edit the name of the field in the available languages.

Note: You can rename fields globally in the data model, see [Renaming Fields](#) in the *CRM.core Administrator Guide*.

Output Field Contents

These settings define the formatting of the field contents.

- **Left/Right/Center:** Select the alignment of the field contents.
- **No border:** Enable this option to display the field without a border.

Note: This setting takes precedence over the **No field border** option in the **Tab Group Properties** window.

Field Text Output

These settings define the formatting of the field name.


- **Align right:** Align field text to the right (default: left-aligned).
- **Hide field text:** Enable this option to prevent the name from being displayed.
- **Field text border:** This option is only available for fields in lists.
- **Definition:** Enable this check box to add a multi-language description field, see [Text Fields for Descriptions](#).

Field Type

These settings determine the field type:

- **Checkbox:** The field is displayed as a check box.
- **Icon:** The field contents are displayed as an icon. Choose this option for fixed catalogs that use icons.
- **Note field:** A field for notes that spans several lines. The **Output Field Contents** pane is grayed out when you select this option.

Note: This option is not available for document, link, e-mail and pure text fields.

- **Free Field:** A field whose contents are calculated and displayed using internal formulas. Do not change these fields' type.
- **Drop-down list:** The field is displayed as a drop-down list. This option is only available for catalog fields.
- **Standard field:** Aurea CRM standard field
- **Text field only:** This option is active if **Text field** is selected in the **Field Selection** window, see [Text Fields for Descriptions](#).
- **Hyperlink:** The field is displayed as a hyperlink. These fields can be used for web pages, e-mail addresses, links to Aurea CRM records and paths to documents, applications etc.
- **update.CRM document field:** Depending on the interface settings in the current desktop format (see [Masks Tab](#) on page 234), clicking on  (**Load**) icon either loads an external document or is used to select a document from within Aurea CRM's document management system. This option is active for fields defined as

document fields in the data model, see [Properties](#) in the *CRM.core Administrator Guide*.

- **Document field:** Users can click on  (**Load**) to enter an external document. The document is not stored in Aurea CRM's document management system.

Note: Select a field with at least 256 characters to display the path.

- **Show reference:** The record's reference is displayed in the field. References must be enabled using the **Show links** option in the interface settings, see [Misc. Tab](#) on page 237. This option is only available for fields in summary index cards.

Text Fields for Descriptions

To add an information field to a mask (or mask type list):

1. Click on  (**Field**).

The **Field Selection** window is displayed:

2. Select **Text field** in the **Field Selection** window.
3. Click on **OK**.
4. Click on the desired position in the mask.

The **Field Properties** window opens.

5. Enable the **Definition** check box in the **Field Properties** window.
6. Enter the desired text under **Field text**. Your text can include carriage returns.
7. Click on **OK**.



8. Resize the field using the mouse. If the text is longer than the space available in the field, a scroll bar is automatically displayed. A ToolTip containing the full text is displayed if the mouse cursor is positioned over the field.
9. Save the mask.

Note: You can determine how long (in milliseconds) ToolTips are displayed using the **ToolTips Duration** configuration entry, see [Mask](#) in the *CRM.core Administrator Guide*.

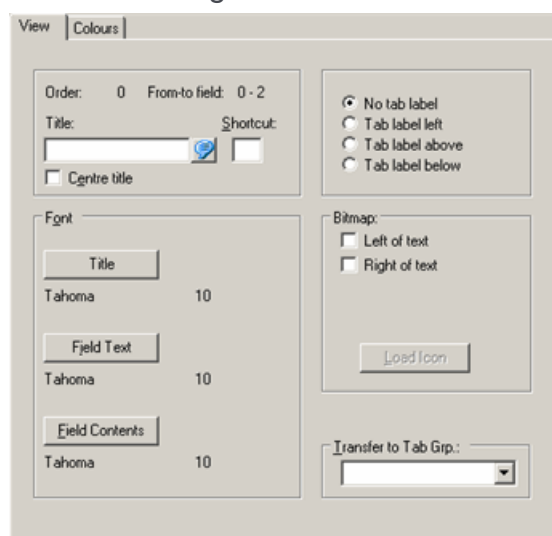
Tab Group Properties

A tab group's properties are defined in the **Tab Group Properties** window.

Tabs divide the mask into sections. Tab groups consist of several tabs. Users can switch between tabs within a tab group, see [Tab Groups](#) on page 201.

View Tab

These settings determine the how the tab is displayed:



- **Order:** The order in which the tabs are selected during editing. All tabs in the mask are numbered sequentially (starting from zero), see [Editing Tab Groups](#).
- **From-To Field:** The field numbers of the fields in the current tab. All fields in the mask are numbered sequentially (starting from zero).

Example: Order "4" and From- to field "13-17" indicate that the current tab is number "4" on the mask and there are 5 fields on this tab. If "-1 -1" is displayed, the tab does not contain any fields.

The tab order of the fields is determined by their position within the tab, see [Field Tab Order](#).

- **Title:** The name of the tab. If the tab is a member of a tab group, this text is displayed on the tab's label. Add the "&" character before the letter entered in the **Shortcut** field to underline the letter used to switch to the tab.
- **Shortcut:** Enter a letter to be used as a shortcut. Alt+Letter switches to the tab.
- **Center title:** Centers the title.
- **No tab label:** The tab group is displayed without a label.
- **Tab label left/above/below:** Determines where the label is displayed.

Font

- **Title:** The font type, size etc. used for the title.
- **Field Text:** The font type, size etc. used for field names.
- **Field Contents:** The font type, size etc. used for field contents.

Bitmap

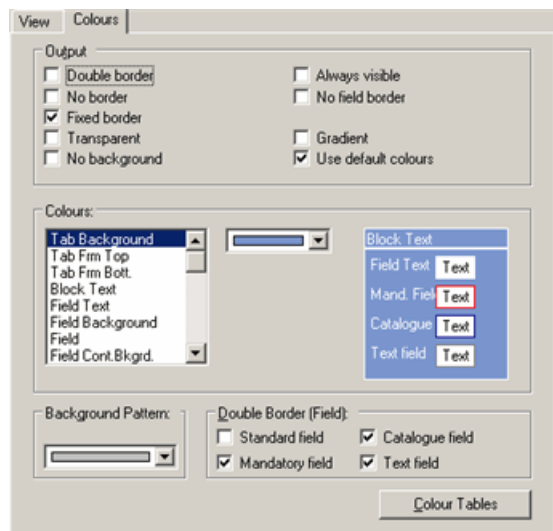
- **Left/Right of text:** Determines whether the selected icon is displayed to the left or right of the tab title.
- **Load Icon:** Click on this button to select an icon. You can only select Aurea CRM bitmaps. You need to select either **Left of text** or **Right of text** check box before you can click on this button.

Transfer to Tab Grp.

Use this option to select assign the tab to a tab group, see [Editing Tab Groups](#).

Colors Tab

These settings determine the colors, backgrounds and borders used by the tab:



Output

- **Double border:** Surrounds the tab with a double border.
- **No border:** The tab is displayed without a border.
- **Fixed border:** If this option is enabled, the double border remains unchanged when a field in the tab receives focus (in edit mode). This option only applies to the **Double border** option. This option has no effect on tabs with a label.
- **Transparent:** The tab is displayed transparently, but field colors are retained.

Note: The **Transparent** option is not suited to tab groups.

- **No background:** The background color of the tab is disabled. The current mask color is used instead.
- **Always visible:** The tab remains visible, even if it contains no visible fields. You can use this option to display the tab even if the user does not have the appropriate field access rights.
- **No field border:** All fields in the tab are displayed without a border.

Note: The **No border** setting for individual fields takes precedence over this setting.

- **Gradient:** The tab color is displayed with a gradient. The **Tab Background** and **2nd background color** colors are the 2 colors used.
- **Use default colors:** Enable this option to ignore the current settings and to use the color settings defined in the current desktop format instead, see [Colors Tab](#) on page 224 and [Skins Tab](#) on page 226.

Colors

To determine the colors of elements in the tab:

1. Select the corresponding element from the list.
2. Select the desired color from the drop-down list.

A preview is displayed to the right.

Background Pattern

Select the background to be used by the tab here.

Double Border (Field)

Use these settings to determine which fields are displayed with a double border. Double borders are only displayed in edit mode for mandatory, catalog and text fields.

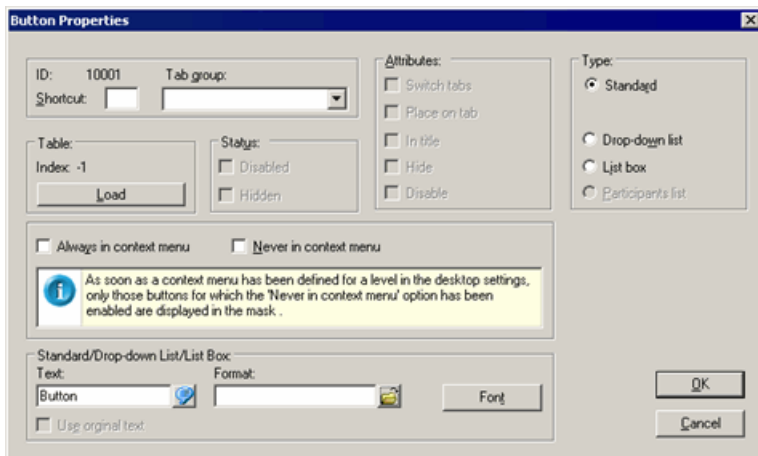
Color Tables

Click on this button to select from a number of predefined color schemes. A preview of the selected settings is displayed.

Click on **Tags** to assign the selected color scheme to several blocks. Blocks with no title are listed using the tab number (displayed under **Order** on the **View** tab), see [View Tab](#).

Button Properties

A button's properties are defined in the **Button Properties** window.



Fields of **Button Properties** window:

- **ID:** The button's ID is assigned automatically by the system.
- **Tab group:** Assign the button to a tab using the drop-down list. To use the button to switch between tabs, enable the **Switch tabs** option under **Attributes** as well.
- **Shortcut:** Enter a letter to be used as a shortcut. Use Alt+Letter as a shortcut instead of clicking on the button.

Table

- **Index:** ID of a predefined Aurea CRM button loaded using the **Load** button (-1 for user-defined buttons).
- **Load:** Loads a pre-defined Aurea CRM button.

Different buttons are available depending on the context, e.g. ">> Extended Search" and "<< Simple Search" (numbers 1265 and 1266) are available in the company search mask. Other buttons are available in all masks, e.g. "Add to Favorites" (number 1275).

Use the **Format** field under **Standard/Drop-down list/List Box** to assign triggers, workflows, reports etc. to a user-defined button, see [User-defined Buttons](#) on page 190.

Status

- **Disabled:** Automatically enabled for buttons used to switch between tabs and cannot be changed.
- **Hidden:** Automatically enabled for buttons used to switch between tabs and cannot be changed.

Attributes

Switch tabs: Enable this option to use the button to switch between tabs, >> .

- **Place on tab:** Places the button on the tab. The button can then only be moved within the tab.
- **In title:** Positions the button in the tab's title.

Hide: The button is not displayed when the corresponding tab is active. To make a button visible again, select **Options > Show all Elements**, double-click on the name of the button, and disable the option.

- **Disable:** The button is displayed as inactive when the appropriate tab is active. This option does not need to be enabled for buttons used to switch between tabs; these buttons are displayed as inactive by default when the appropriate tab is active.

Type

- **Standard:** Standard button.
- **Drop-down list:** The button is displayed as a drop-down list.

The following drop-down lists are predefined:

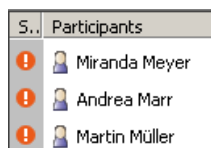
- For choosing a category in the mask in the **Document** info area (no. 1030)
- For choosing the month and year in the **Calendar** (nos. 1015 and 1016)
- BTB only: for choosing a rep in the **Opportunity Overview** info area (no. 4066)

You can also use drop-down lists to directly choose selections in the **Properties** (BTB) and **Company+Person** levels, see [Selections](#) in the User Manual. Choose the button "1237 Selection" using the **Load** button under **Table**.

- **List box:** The button is displayed as a list box.

The following list boxes are pre-defined:

- Define Print Format (no. 1033)
- **Participants list:** This option is only available in the **Activity** level and is used to display participants (no. 1082).



Use the **Load** button to load the **Participants** button.

Always/Never in context menu

You can determine whether buttons are displayed as mask buttons or context menu entries:

- **Always in context menu:** The button is displayed as a context menu entry.
- **Never in context menu:** The button is displayed as a button in the mask.

Note: If neither of these check boxes is enabled for a button, the **Move mask buttons to context menu** option in the current desktop's interface settings is applied, see [Masks Tab](#) on page 234 (**General** pane). If the current desktop format includes context menu entries for the level being edited in the Mask Generator, only those mask buttons are displayed where the **Never in context menu** option is enabled.


Standard/Drop-down List/List Box

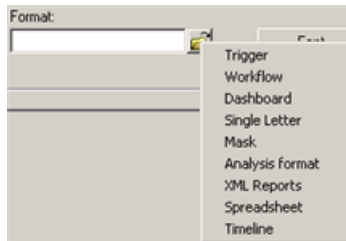
- **Text:** Name of the button, drop-down list or list. Add the "&" character before the letter entered in the **Shortcut** field to underline the letter.
Format: Format(s) executed by clicking on the button, see [User-defined Buttons](#) on page 190:
- **Font:** Use this button to specify the font settings for the button's text.
- **Use original Text:** This check box is available if you have loaded an Aurea CRM button using the **Load** button. Enable this check box to display the original button text in all languages.

User-defined Buttons

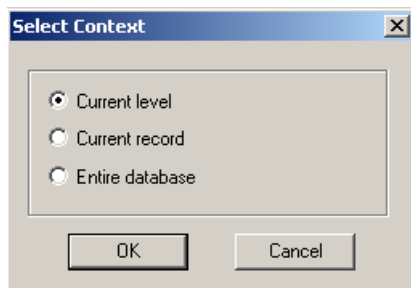
Learn how to define custom buttons.

To define buttons used to execute user-defined functions (triggers, workflows etc.):

1. Define a new button, see [Adding Elements](#) on page 179.
2. Click on  (**Select**) next to the **Format** field in the button properties.



3. Select the desired function from the popup menu, e.g. **Analysis format**.
4. Load the desired format and confirm, see [Loading, Saving and Deleting Formats](#) in the *User Manual*.
5. Depending on the selected function, you can determine further options, e.g. the context of the analysis:



6. Click on **OK**.

The name of the selected format is displayed in the **Format** field.



The first number is the internal number of the format type. The subsequent numbers represent the selected options (in this case: 0=Current level, 1=Current record, 2= Entire database).

7. Configure the rest of the button properties, if desired, see [Button Properties](#) on page 188.
8. Click on **OK**.
9. Save the mask.

Note: Buttons used to execute a format can only be used in the Aurea CRM win main module.

You can execute multiple user-defined functions one after another from a single button (e.g. multiple triggers, or combinations of different formats). Enter the formats in the **Format** field using the following syntax:

Format type ID;Options;Format Name@Format type ID;Options;Format Name@ etc.

Note: If you do not specify any options, the default settings are used.

Example: 22;Trigger1@22;Trigger2@7;2;1;1;Single letter

In this example, two triggers are executed one after another; a single letter is then sent by e-mail and saved in Aurea CRM's document management system.

Format Type IDs


No.	Format
1	Search condition
7	Single letter
18	Mask
22	Trigger
28	Workflow

No.	Format
30	Dashboard
34	Spreadsheet
44	XML Report
45	Analysis format
47	Timeline

Loading Conditions using a Button

Learn how to define a button used to enable conditions

Follow the below steps:

1. Define a new button, see [Adding Elements](#) on page 179.
2. Click on  (**Select**) next to the **Format** field in the button properties.
3. Select **Search Condition**.

If the current level includes multiple info areas (e.g. **Company + Person**), the available info areas are displayed in a list. Select the desired info area.

4. Load the desired (global or user-specific) condition, see [Loading, Saving and Deleting Formats](#) in the User Manual.

The selected condition is displayed in the **Format** field.



5. Configure the button's other properties, see [Button Properties](#) on page 188.
6. Click **OK**.
7. Save the mask.

When a user clicks on the button, the selected condition is enabled. The condition can be disabled by selecting **Data > Activate Conditions > <Info Area>**. Alternatively, you can define an additional button used to disable the conditions that accesses an empty condition.

Note: Buttons that activate conditions can only be used in the main module. When clicking on a button that activates conditions, any currently active conditions and autofilters are automatically disabled, see [Conditions](#) in the *User Manual*.

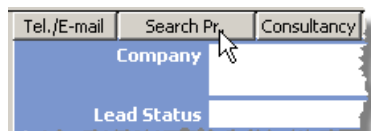
Special case: Product Search in the FS Vertical

You can customize the mask used to search for products based on the product number

For further details, see [Product Search](#) in the FS Business Logic Manual.

Select **Extras > Edit Mask** from the menu in the **Company+Person** level.

1. Double-click on **Search Pr..**



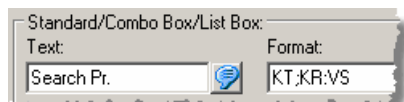
2. Enter the abbreviation of the product info area(s) to be displayed in the search in the **Format** field in the **Button Properties** window.

- AL: Securities Account
- BS: Bldg. Soc. Sav.
- DI: Service
- KR: Loan
- KT: Account
- KV: MV - Insurance
- NV: Other - Insurance
- VS: Personal Insurance
- WT: Security Title
- VW: Asset Values

Additional options:

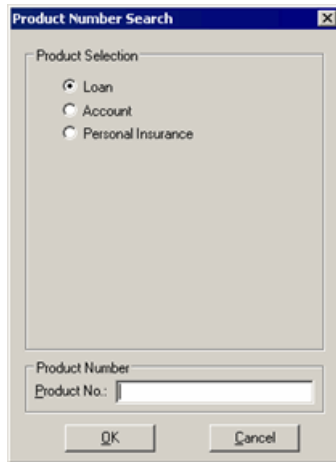
- PU: The **All** option is displayed in the search and users can search in all product info areas.
- FI: If a product is found in the product search based on the product number, the person associated with the product record is displayed, not the product record.

Separate abbreviations using a semicolon (;).

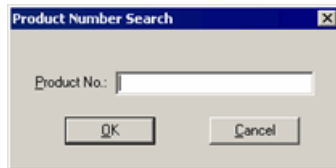


3. Save the mask.

If a user now selects **Search Pr.** in the **Company+Person** level, the defined search options are displayed:

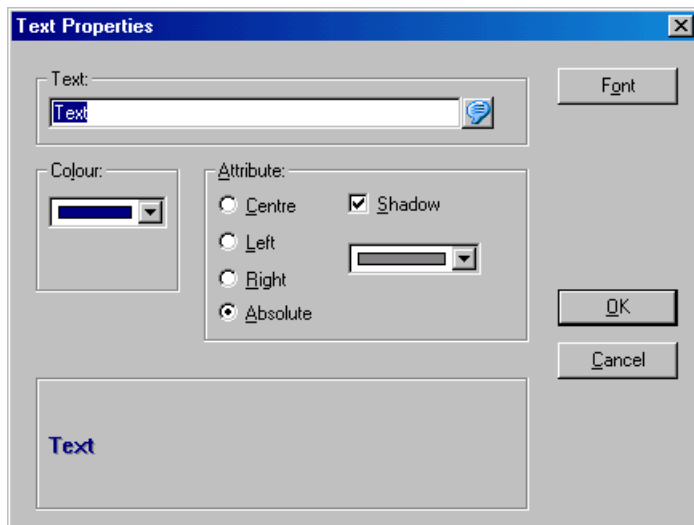


If you only entered the "PU" option, no radio buttons are displayed in the product search.



Text Properties

Text properties are defined in the **Text Properties** window.



Fields of **Text Properties** window:

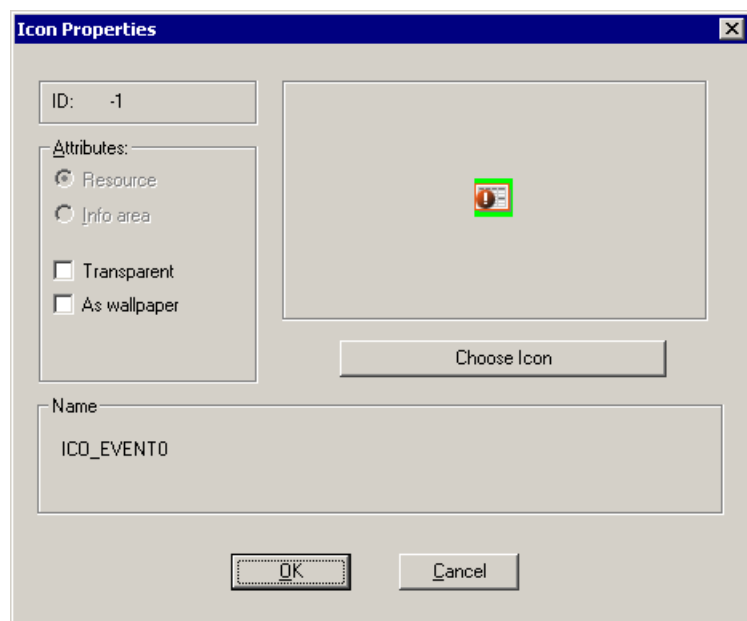
- **Text:** Enter the desired text here.
- **Color:** The color of the text.

Attributes

- **Center/Left/Right:** The alignment of the text relative to the mask.
- **Absolute:** Allows you to position the text freely by clicking on the desired position.
- **Shadow:** Enable this check box to select a color from the drop-down list below. The text is displayed with a shadow in this color.
- **Font:** Click on this button to define the font type, size etc.

Icon Properties

Icon properties are defined in the **Icon Properties** window.



Fields of **Icon Properties** window.

Attributes

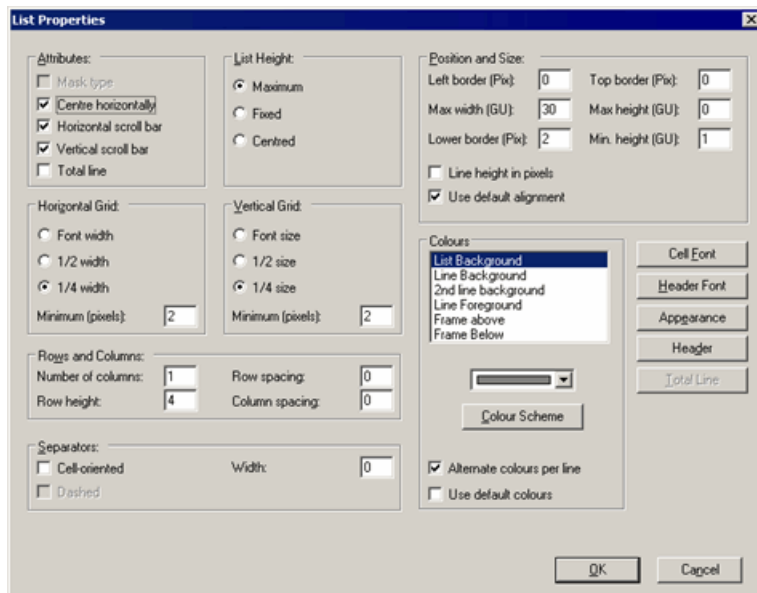
- **Resource:** This option is always grayed out. The option is enabled if you select a predefined Aurea CRM icon.
- **File:** This option is always grayed out. The option is enabled if you select a user-defined icon.
- **Transparent:** The icon's background color is set to transparent.
- **As wallpaper:** The icon is displayed as a background image behind other mask elements.
- **Choose Icon:** Click on this button to choose from the predefined icons or to load your own bitmap. The icon is displayed in its original size and cannot be changed.

Name

Displays either the name of predefined icons or the path and file name of custom icons.

List Properties

List properties are defined in the **List Properties** window.



Fields of **List Properties** window.

Attributes

- **Mask Type:** This check box is enabled automatically if you are editing a mask type list.
- **Center Horizontally:** The list is centered horizontally within the mask. Drag the list element in the mask generator to resize the list. Note that the Max width (GU) setting is ignored if
- **Horizontal/Vertical Scroll Bar:** Enable these options to display scroll bars if the list size exceeds the size of the mask.
- **Total Line:** A line containing the total is displayed at the bottom of the list.

List Height

- **Maximum:** The list height is automatically set to the maximum available in the window. The list is resized if the window is resized.
- **Fixed:** The maximum list height is set to **Max height (GU)**; the minimum list height is set to **Min width (GU)**. If both these values are equal, the list is always displayed with the same height. If the **Center horizontally** option is disabled, the width of the list is set to the value entered in the **Max width (GU)** field. If the list dimensions exceed the current size of the window, scroll bars are displayed.
- **Centered:** Adds a margin below the list. Enter the size of the margin in the **Lower border (Pix)**.

Horizontal Grid

Grid units are based on the current font.

- **Font Width:** The font width is used as the horizontal grid unit.
- **½ width:** Half the font width is used as the horizontal grid unit.
- **¼ width:** A quarter of the font width is used as the horizontal grid unit.
- **Minimum (pixels):** The horizontal grid unit is never smaller than the pixel size specified here.

Vertical Grid

- **Font size:** The font height is used as the vertical grid unit.
- **½ size:** Half the font height is used as the vertical grid unit.
- **¼ size:** A quarter of the font height is used as the vertical grid unit.
- **Minimum (pixels):** The vertical grid unit is never smaller than the pixel size specified here.

Changes to the vertical grid units affect the **Row Height** field.

Rows and Columns

- **No. Cols.:** Lists can be spread over several columns. Note that these columns are not list columns; each such column contains all the fields in the list.
- **Row Height:** The height of each row in grid units. This value is automatically converted to pixels or grid units if the **Line Height in Pixels** is enabled/disabled.
- **Row Spacing:** Increases the spacing between rows by this amount of pixels (color = background color).

Note: The **Row Spacing** setting only applies if the **Cell-oriented** options is also enabled.

- **Column Spacing:** The spacing between columns in pixels (color = background color).

Separators

- **Cell-oriented:** Surrounds each cell with a border. Enter the width of the border in the **Width** field.
- **Dashed:** Only applied if the **Cell-oriented** option is disabled. This check box is only available for mask type lists.
- **Width:** The width of the border surrounding cells if the **Cell-oriented** option is enabled.

Position and Size

- **Left border (Pix):** The size of the left hand margin in pixels. The margin has the same color as the list background.
- **Max width (GU):** Maximum width of the list in grid units (only applied if **Fixed** is selected under **List Height** and **Center Horizontally** is disabled under **Attributes**).
- **Lower border (Pix):** Specifies the height of the margin at the bottom of the list (if the **Centered** option under **List Height** is enabled).
- **Top border (Pix):** Top margin in pixels. The margin has the same color as the list background.
- **Max height (GU):** The maximum height of the list in grid units. If the window is resized, the height of the list does not exceed this value.
- **Min. height (GU):** The minimum height of the mask in grid units. If the window is resized, the list is never resized to be smaller than this value.
- **Line height in pixels:** Determines whether the line height is specified in pixels. The value in the **Row Height** field is automatically converted if this option is enabled/disabled.
- **Use default alignment:** The **Vertical Position (User Interface > Mask tab > Lists pane)** defined for lists in the current desktop format is applied, see [Masks Tab](#) on page 234.

Colors

To determine the colors of list elements:

1. Select the corresponding element from the list.
 2. Select the desired color from the drop-down list.
- **Color Tables:** Click on this button to select from a number of predefined color schemes.
 - **Alternate colors per line:** Rows in lists are displayed in two alternating colors (**Line Background** and **2nd line background**).
 - **Use default colors:** Enable this option to ignore the current settings and to use the color settings defined in the current desktop format instead, see [Colors Tab](#) on page 224 and [Skins Tab](#) on page 226.

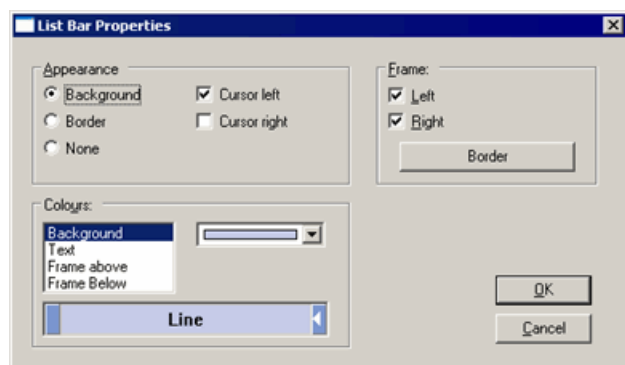
Buttons

- **Cell Font:** Click on this button to define the font type, size etc. used in rows in the list.
- **Header Font:** Click on this button to define the font type, size etc. used in the header.
- **Appearance:** Opens the **List Bar Properties** window, see [Configuring the Appearance of the Selected Record](#) on page 199.
- **Header:** Opens the **Header Properties** window, see [Header Properties](#) on page 200.
- **Total Line:** Opens the **List Summary Line Properties** window, see [Configuring the Total Line](#) on page 200. This button is only active if the **Total Line** option is enabled under **Attributes**.

Configuring the Appearance of the Selected Record

The appearance of the current record in the list is configured in the **List Bar Properties** window.

Click on **Appearance** in the **List Properties** window to configure the appearance.



Appearance

- **Background** The current record is displayed with the selected background color.

22.07.2003	13:00
22.07.2003	20:00

- **Border:** The selected record is displayed with a border in the selected color.

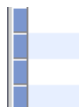
22.07.2003	13:00
22.07.2003	20:00

- **None:** The current record is not distinguished visually.
- **Cursor left/right:** Use these options to determine whether the cursor should be displayed to the left or right of the current row.



Frame

- Use these options to determine whether the **Left** and **Right** frames of the list should be displayed.



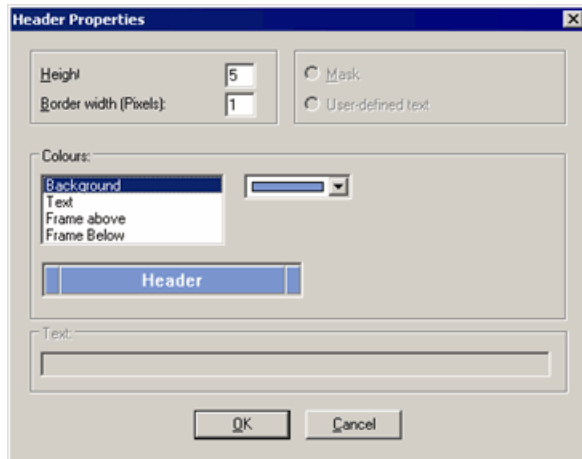
- Click on **Border** to define the properties of the frame:
 - **Dimensions:** Enter the width of the frame and the border within the frame.
 - **Colors:** Use these settings to configure the colors of the individual frame elements.

Colors

Define the colors used for the current record here.

Header Properties

Click on **Header** in the **List Properties** window to configure the header.



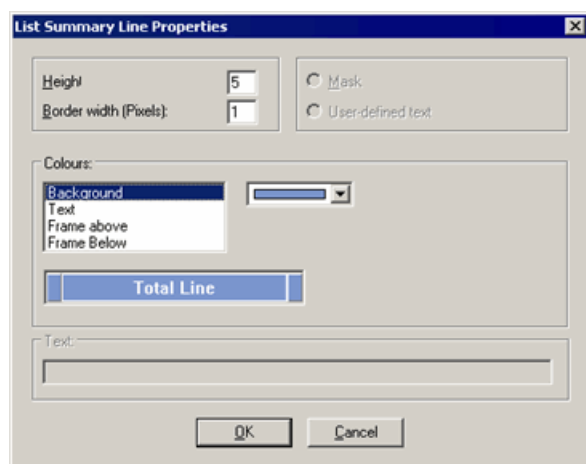
- **Height:** Height of the header in grid units.
- **Border width (Pixels):** Width of the border in pixels.
- **Colors:** Use these settings to define the colors in the header.
- **Mask/User-defined text:** These options are only available in mask type lists:
 - **Mask:** The header is defined as a mask. Select **Options > List Sub-unit > Header** to define the mask used by the header, see [Defining Mask Type Lists](#).
 - **User-defined text:** The header only contains text.

Enter the desired text in the **Text** field.

Configuring the Total Line

Enable the **Total Line** option in the **List Properties** window to include sum totals in your list.

Click on the **Total Line** button to define the appearance of the total line.




- **Height:** Height of the line in grid units.
- **Border width (Pixels):** Width of the border in pixels.
- **Colors:** Define the colors used in the total line here.
- **Mask/User-defined text:** These options are only available in mask type lists:
 - **Mask:** The total line is defined as a mask. Select **Options > List Sub-unit > Total Line** to define the mask used by the total line, see [Defining Mask Type Lists](#).
 - **User-defined text:** The total line only contains text.
Enter the desired text in the **Text** field.

Tab Groups

A tab group consists of several tabs.

To create a tab group:

1. Click on  (**Tab**).
2. Click on another tab on the mask.
3. A message is displayed. Confirm the message with **Yes**.

Editing Tab Groups

To switch to a specific tab in the mask generator:

- Select **Options > Show all Elements**, select the tab and click **OK**.
- Click on the tab group and use the Tab key to navigate between tabs in the group.
- Right-click on the tab group and select **Show Next Tab** from the popup menu.

- Click on the tab group and select **Options > Tab Group > Show Next Tab** from the menu.
- Select **Options > Test Mask/List** and click on the tab to test it. Select **Options > Edit Mask/List** to return to edit mode.

To remove a tab from a group or assign the tab to a new group using the mouse:

1. Navigate to the desired tab.
2. Hold down the Shift key and use the mouse cursor to drag the tab to the desired position.
 - Drag the tab to an empty area on the mask to remove the tab from the current tab group. Any buttons added to the mask and used to switch to this tab lose their function.
 - Drag the tab to another tab group to assign the tab to the new tab group. You are asked to confirm the assignment. Click on **Yes**.

The tab is assigned to the new tab group.

To remove a tab from a group or assign the tab to a new group in the **Tab Group Properties** window:

1. Navigate to the desired tab.
2. Open the **Tab Group Properties** window.
3. Select the target tab from the **Transfer to Tab Grp.** drop-down list.



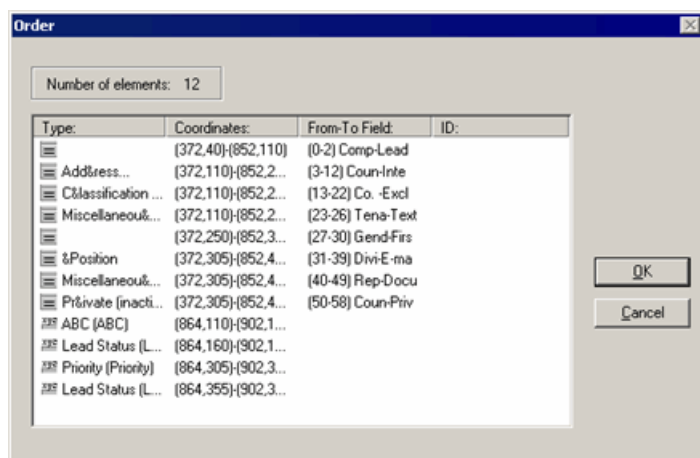
Select the empty entry (at the end of the list) to remove the tab from its current group. Any buttons added to the mask and used to switch to this tab lose their function.

4. Confirm the message to adjust the position.
5. Click on **OK**.

To change the order of tabs within a tab group:

1. Select **Options > Order** from the menu.

A list of all tabs and fields not assigned to tabs is displayed.

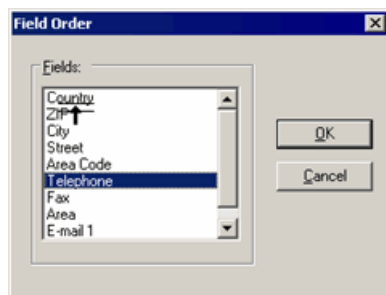


2. Click on the name of the tab you wish to move and drag the line to the desired position.
3. Click on **OK**.

Field Tab Order

To change the tab order of fields in a tab:

1. Navigate to the desired tab.
2. Select **Options > Tab Group > Field Order** from the menu.
3. Select the field whose position you wish to change.
4. Move the cursor to the desired position between two fields. Once the cursor changes, click to move the field.



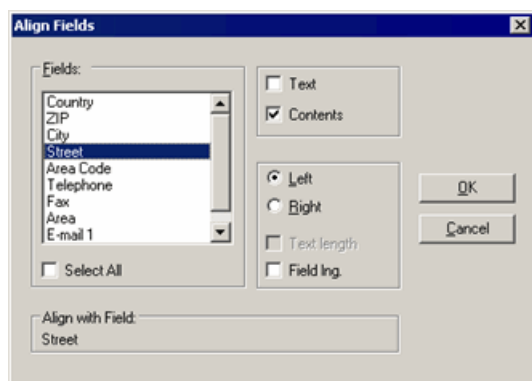
The selected field is moved.

5. Click on **OK**.

Aligning Fields

To align the fields in a tab:

1. Select the tab or a field to align the other fields with.
2. Select **Options > Tab Group > Field Order** from the menu.



If you selected a field in step 1, it is displayed under **Align with Field**.

3. Select all the fields you wish to align in the **Fields** list.
Enable **Select All** to select all the fields.
4. If you did not select a field in step 1, you can now determine how to align the fields.
 - **Left:** Fields are assigned the position of the field furthest to the left.
 - **Right:** The right field borders are aligned with the right edge of the field furthest to the right.
5. Determine the following settings:
 - **Text:** Field names are aligned.
 - **Contents:** Field contents are aligned.
 - **Text length:** All field names are set to the length of the longest field name. This option is only available if the **Text** check box is enabled.
 - **Field Ing :** All field lengths are set to the length of the widest field. This option is only available if the **Contents** check box is enabled.
6. Click on **OK**.

Defining Buttons to Switch Between Tabs

If you define tab groups without labels, you need to define buttons used to switch between the tabs:

1. Define a new button and do not assign it to a tab.
The **Button Properties** window opens.
2. Select the tab the button should activate from the **Tab group** drop-down list.
3. Enable the **Switch tabs** option under **Attributes**.
4. Enter a caption for the button in the **Text** field.
5. Click on **OK**.
6. Define further buttons for the remaining tabs in the tab group.
7. Save the mask.

Defining a Global Color Scheme

You can define a global color scheme for all masks, lists and tables in Aurea CRM and assign the corresponding desktop format to users, groups and stations.

For further details, see [Skins Tab](#) on page 226.

To define a global color scheme:

1. Start Aurea CRM win as SU.
2. Switch to the **Company+Person** level.
3. Select **Extras > Edit Mask** from the menu.
4. To change the background, open the **Mask Properties** window and change the settings in the **Background** pane, see [Mask Properties](#) on page 175.
5. Define the color settings (in the **Colors** and **Double Border (Field)** panes in the **Tab Group Properties** window, see [Tab Group Properties](#) on page 185) of the following tabs:

The screenshot displays two examples of tab groups in a CRM mask editor. The first group, labeled '1', contains three fields: 'Company', 'Lead Status', and 'Synonym'. The second group, labeled '2', contains a grid of fields: 'Gender', 'Last Name', 'Title', 'First Name', 'Division', 'Tel 1', 'Position', 'Fax', 'Job Title', 'Mobile Tel.', 'Influence', 'Priority', and 'E-mail 1'. Below the first group are three tabs: 'Address...', 'Classification', and 'Miscellaneous'. Below the second group are three tabs: 'Position', 'Miscellaneous', and 'Private'. A third group, labeled '3', is partially visible and contains fields for 'Country', 'Telephone', 'City', 'Fax', 'Street', 'Area', 'E-mail 1', and 'Internet'.

- The first tab without any tab labels (1)
- The second tab without any tab labels (2)

This setting is used for all tabs groups without tab labels, except for the first block (1). If only one block without tab labels is present in the mask, that tab's settings are applied to all tabs without labels.

- The first tab group with tab labels (3)

These settings apply to all tab groups with tab labels. If no tab group with tab labels is present in the mask, the settings defined for the second tab group without labels (2) are applied.

- The first transparent tab

To do so, define a transparent tab (**Tab Group Properties, Colors** tab, **Transparent** check box).

Global summary index cards are defined in the same manner as masks. The first tab's settings are applied to all tabs.

Settings for global lists are defined under **Horizontal Grid, Vertical Grid, Colors, Rows and Columns, Separators, Cell Font, Header Font, Appearance** and **Header** in the **List Properties** window, see [List Properties](#) on page 196.

Settings for global lists can also be applied to tables, see [Tables](#).

6. Save the mask or list and exit the Mask Generator.
7. Select **Extras > Define Desktop** from the menu, see [Defining a Desktop](#) on page 215.
8. Load the desktop format you wish to assign the global color scheme to.
9. Click on **User Interface** under **Global Settings**.
10. Switch to the **Skins** tab.
11. Load the desired formats under **Masks, Lists** and **Tables**, and enable the **Default** check box, see [Skins Tab](#) on page 226.
12. Save the format.

Tables

Tables in Aurea CRM win are similar to lists, but are used for other functions (selections, print formats, appointment distribution), >> Tables in the User Manual.

You can use list formats to customize the colors of tables. Colors are assigned to tables as follows (**Colors** and **Separators** panes in the **List Properties** window in the Mask Generator):

List	Table
List Properties (see User-defined Buttons on page 190) - Colors pane:	
List Background	Table background and grid color
Line Background	Cell background color, if the original color is white
2nd Line Background	Cell background color, if the original color is gray

List	Table
Line Foreground	Text color
Frame above	Upper cell frame color
Frame below	Bottom cell frame color
List Bar Properties (see Configuring the Appearance of the Selected Record on page 199) - Colors pane:	
Background	Background cell color while entering data or selecting a catalog value
Text	Text color in text and catalog cells during input
Frame above	Upper frame color of text and catalog cells
Frame below	Bottom frame color of text and catalog cells
Header Properties (see Header Properties on page 200) - Color pane:	
Background	Background color of the header
Text	Color of the header text
Frame above	Upper frame color
Frame below	Bottom frame color
List Properties - Separators pane:	
Width	Cell border width
List Properties - Rows and Columns pane:	
Row Spacing	Spacing between rows in the table
Header Properties:	
Border width	Header border width

Automatic Layout

You can use the automatic mask layout function to automatically arrange fields.

For further details, see [Automatic Layout Rules](#).

This function is not available for masks that contain lists or tables.

To use the automatic mask layout function:

1. Select **Options > Automatic Layout** from the menu or enable the **Automatic Layout** option in the **Mask Properties** window.

The current mask is automatically converted. "automatic layout" is displayed in the status bar.

The screenshot shows a form with the following fields and their layout:

- Act. StNo. (input field)
- Activity (input field)
- Act. No. (input field) and Level (input field)
- Rep (input field)
- Act. Variation (input field)
- Date (input field)
- Campaign (input field)
- Act. Status (input field) and Execution Status (input field)
- Act. Key (input field)
- Publ. Medium (input field)
- Code (input field)
- Publ. Name (input field)
- E-mail (input field)
- Publ. Date (input field)
- Country (input field)
- Publ. Time (input field)
- Area (input field)
- Document (input field)

The status bar at the bottom shows 'Activity Text'.

You cannot move mask elements using the mouse or keyboard or edit the mask size if the automatic layout option is enabled.

2. Edit the current mask or create a new mask, see [Layout Settings](#) on page 210 and [Creating a Mask Using the Automatic Layout Function](#).
3. Disable the **Automatic Layout** option once the mask has been converted.

Automatic Layout Rules

The following rules apply to the automatic mask layout function:

- Automatic layout mode uses one main tab in the upper portion of the mask and a tab group in the lower portion.

If the upper portion of the mask includes several tabs positioned next to one another, these tabs are grouped together in a single tab. The contents of the original tabs are separated by an empty line between them.

Note: The structure used by the **Company+Person** level, which uses two main tabs, is retained.

- All fields must be assigned to a tab group.
- Fields are arranged in two columns:
 - If a field is positioned entirely to the left of the center of a tab, it is assigned to the left-hand column.
 - If a field is positioned entirely to the right of the center of a tab, it is assigned to the right-hand column.
 - If the field spans the center of the tab, it spans both columns.
 - If several fields are next to each other in the same column (e.g. **Postal Code** and **City**), these fields are displayed over several lines, one above the other.
- Fields exceeding a certain length are either displayed spanning both columns or spanning several lines, see [Layout Settings](#) on page 210.
- All fields in summary index cards occupy a single column.
- Check boxes are displayed in their default size as a box.
- You cannot use icons or text elements.
- Icons used to indicate field contents are always added to a fixed pane to the right of the mask.
- A single text field can be added per mask for descriptions (information field, see [Text Fields for Descriptions](#)). This field is displayed to the right of any icons.
- No buttons are displayed; all options are available from the context menu only.

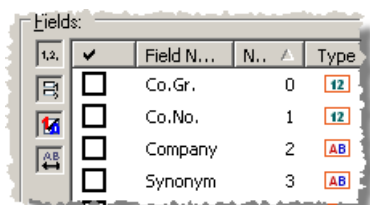
Creating a Mask Using the Automatic Layout Function

To create a new mask using the automatic layout function:

1. Switch to the level you wish to define a new mask for, and open the Mask Generator, see [Defining a New Mask](#) on page 173.
2. Select **Options > Automatic Layout** from the menu.
3. Select **File > New Mask** from the menu.

A new mask is created that contains two tabs.

4. Click on  (**Field**).



5. Enable the check boxes next to the fields you wish to display in the mask. Up to 15 fields can be added to a tab.
6. Click on **OK** and click on the desired tab.

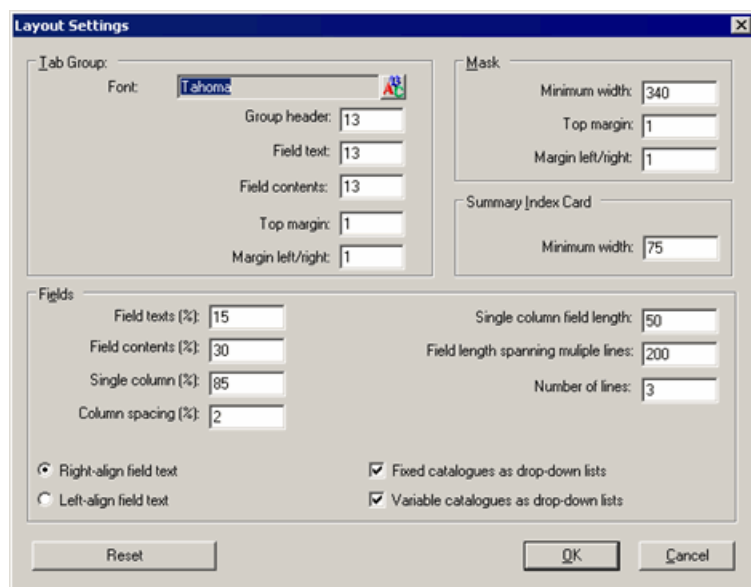
The fields are automatically laid out on the tab, see [Automatic Layout Rules](#).

7. Make any further settings, see [Layout Settings](#) on page 210 and [Automatic Layout Field Properties](#).
8. Save the mask.

Layout Settings

Learn how to set Layout settings.

Select **Options > Layout Settings** from the menu to configure the automatic layout settings.



Tab Group

- **Font:** Font for tab headings, field texts and contents.
- **Group header:** Font size of the tab headings.
- **Field text:** Font size of the field texts.
- **Field contents:** Font size of the field contents.

Note: You cannot configure fonts or font sizes in the **Tab Group Properties** window when using the automatic layout function.

- **Top margin:** Upper margin in the tab group in grid units.
- **Margin left/right:** Left and right margin in the tab group in grid units.

Mask

- **Minimum width:** The width of the mask in grid units.
- **Top margin:** Upper margin of the mask in grid units.
- **Margin left/right:** Left and right margins of the mask in grid units.

Summary Index Card

- **Minimum width:** The width of the summary index card in grid units.

Fields

- **Field texts (%):** Percentage of the total width of the tab for field names.
- **Field contents (%):** Percentage of the total width of the tab for field contents.
- **Single column (%):** Percentage of the total width of the tab fields spanning both columns.
- **Column spacing (%):** Percentage of the total width of the tab for the spacing between two columns.
- **Single column field length:** Fields longer than the length entered here (in characters) automatically span the entire width of the mask when they are added to the mask or the mask is converted.
- **Field length spanning multiple lines:** Fields that contain more characters than the number entered here automatically span the entire width of the mask and several lines.
- **Number of lines:** Enter the standard size (in lines) for fields spanning several lines.
- **Right/Left-align field text:** Determines whether field names are aligned to the right or left.

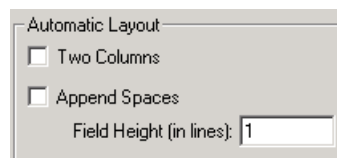
Note: The **Align** right and **Hide** field text options in the **Field Properties** window (under **Field Text Output**) are not available when using the automatic layout function.

- **Fixed/Variable catalogs as drop-down lists:** Determine whether fixed and variable catalogs are displayed as drop-down lists instead of windows.

The settings are automatically saved in a global "Mask Layout" format, see [Formats](#) in the *User Manual*.

Click **Reset** to revert to the default settings.

Automatic Layout Field Properties



The following options are available in the **Field Properties** window when using the automatic layout function:

- **Two Columns:** The field spans the entire width of the mask (i.e. both columns). The next field is moved to the following line.
- **Append Spaces:** An empty line is added after the current field. If a field is located to the right of this field, the second field is moved to the line after the empty line.
- **Field Height (in lines):** The size of fields spanning multiple lines.

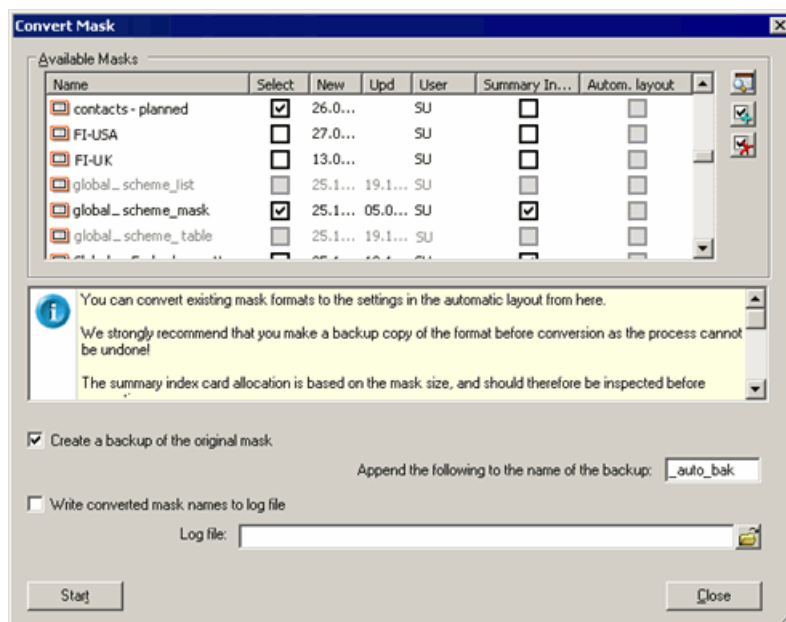
Note: If a field spans several lines, it automatically occupies the full width of the mask.

Converting Masks

Learn how to convert several saved masks to an automatic layout at once.



Follow the below steps:

1. Open the Mask Generator.
2. Select **Options > Convert Masks** from the menu.



All mask formats are listed.

3. Enable the check box in the Select column next to the masks you wish to convert.

Click on  (**Select All**) to select all masks; click on  (**Clear Selection**) to deselect all masks.

Note: Grayed out mask formats contain lists or tables and cannot be converted.

If the check box in the **Summary Index Card** column is enabled, the mask is converted like a summary index card, see [Automatic Layout Rules](#). The automatically enables this setting based on the mask size, but this can be changed.

The check box in the **Autom . layout** column is enabled for masks that have already been saved using the automatic layout feature.

4. Click on a mask and click  (**View**) to display the mask.

5. Enable the **Create a backup of the original** mask option and enter text in the **Append the following to the name of the backup** field. A backup of the converted masks is created in the process.

Note: The name of backups is limited to 60 characters.

If a backup already exists with the specified name, backups are numbered sequentially (from "_1" to "_99").

6. Enable the **Write converted mask names to log file** check box and specify a log file in the **Log file** field to create a log file.

These settings are saved for each user in the `gm.ini` file.

7. Click **Start** to begin the conversion.

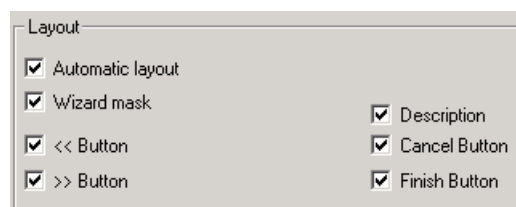
Wizard Masks

Wizards can be used to guide users through the entry of data.



To define a wizard mask:

1. Define a mask with the desired fields.
2. Open the **Mask Properties** window.
3. Enable the **Automatic layout** and **Wizard mask** check boxes in the **Layout** pane.
4. Select the elements for the wizard mask.



- **<< Button:** Back button
- **>> Button:** Next Button
- **Description:** Text field for descriptions and instructions
- **Cancel button:** Cancel button (cancels the entry without saving).
- **Finish Button:** Finish button (saves the data).

Note: By default, the **Cancel** and **Finish** buttons send the "cancel" or "save" command to the current level. They can also be used to load masks or initiate triggers or workflows, see [Button Properties](#) on page 188.

5. Click on **OK**.

The buttons are displayed under the mask.

6. If you have chosen to include a Description, double-click on the field to enter the text.

7. Click on **OK**.

8. Save the mask.

9. Define further wizard masks for subsequent steps.

10. Reload the first mask.

11. Double-click on the **Next ->** button.

The **Button Properties** window opens.

12. Click on  (**Select**) to the right of the **Format** field (under **Standard/Combo Box/List Box**).

13. Select a mask to be accessed by clicking on the **Next** button.

14. Define the previous and next masks in the same manner for all masks in the wizard. Note that the first mask may not contain a **<- Back** button and the last mask may not contain a **Next ->** button.

Desktop

Desktop formats allow you to configure user interface elements, levels and info areas, as well as define new levels.

The settings are saved in a format (see [Formats](#) in the *User Manual*) and can be assigned to users, groups and stations, see [Assigning Desktops](#).

You can:

- configure how users can navigate in Aurea CRM win (define start levels and provide access to levels, dashboards and workflows from the icon bar or **Info** menu), see [Navigation](#) on page 219.
- configure the menus in Aurea CRM win (rename or deny access to entries), see [Configuring Menus](#) on page 222.
- configure the user interface in Aurea CRM win (colors, skins, context menu, level headers etc.), see [Configuring the User Interface](#) on page 223.

- add buttons to the general toolbar (templates, search, print, program calls), see [Configuring the General Toolbar](#) on page 241.
- define level properties (masks, header, templates, conditions etc.), see [Level Properties](#) on page 248.
- define info area settings (references, search, filter masks, conditional formatting, tree view), see [Info Area Settings](#) on page 290.
- create parent desktops containing default settings that are extended by child desktops that contain settings for specific departments or users, see [Extended Desktops](#) on page 299.
- deny access to levels, see [Denying Access to Levels](#) on page 250.
- define new levels, see [Defining New Levels](#) on page 301.

Use access rights to prevent users, groups or stations from defining new levels and accessing the desktop settings, see [Defining Further Settings](#) in the **CRM.core Administrator Guide**.

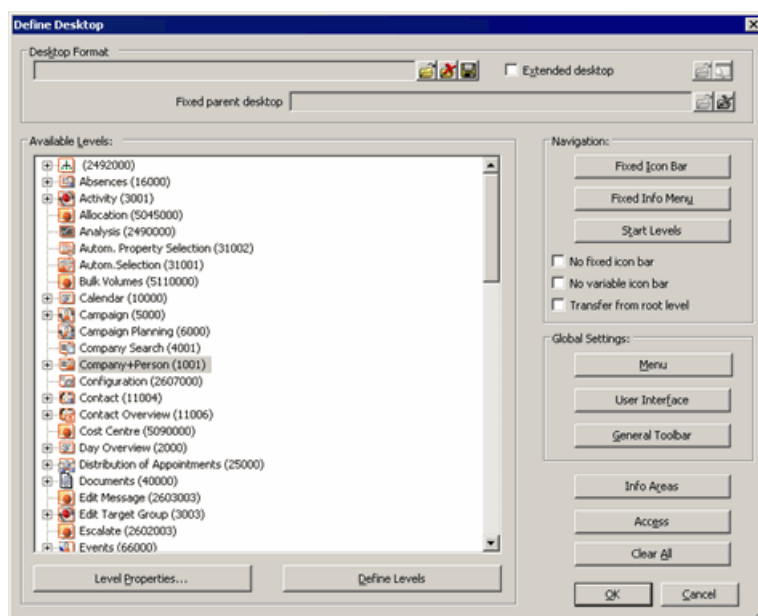
Defining a Desktop


Learn how to define a desktop.



To define a desktop:

1. Select **Extras > Define Desktop** from the menu.


All levels (and their dependent levels) available in Aurea CRM win's main module are displayed in the **Define Desktop** window along with their ID.



- Right-click in the list and select **Find** from the popup menu to search for a level. You can search for either a portion of the level's name or the level ID.
- Click on  (**Load**) next to the **Desktop Format** field to load a desktop format.

- Click on  (**Delete**) to remove the format name from the **Desktop Format** field.
 - Enable the **Extended desktop** to define the current desktop as a child desktop, see [Extended Desktops](#) on page 299.
 - Click on **Define Levels** to define new levels, see [Defining New Levels](#) on page 301.
2. Configure the navigation elements:
 - **Fixed Icon Bar/Fixed Info Menu/No fixed icon bar/No variable icon bar/Transfer from root level**, see [Fixed Icon bar](#) and [Fixed Info Menu](#).
 - **Start Levels**: Levels opened automatically when the desktop is loaded, see [Start Levels](#).
 3. Define the global settings:
 - **Menu**: Deny access to and rename menu entries, see [Configuring Menus](#) on page 222.
 - **User Interface**: User interface settings (colors, context menu, headers, masks, lists etc.), see [Configuring the User Interface](#) on page 223.
 - **General Toolbar**: Define which buttons are displayed in the toolbar, see [Configuring the General Toolbar](#) on page 241.
 4. Define level properties, see [Level Properties](#) on page 248.
 5. Define info area settings, see [Info Area Settings](#) on page 290.
 6. Click on **Access** to deny or allow access to the desktop by specific users, groups or stations, >> [Granting and Denying Access to Desktops](#).
 7. Click on  next to the **Desktop Format** field to save the format, see [Saving, Loading and Deleting Formats](#) in the *User Manual*.

Note: The interface and info area settings are saved in individual formats that are referenced by the desktop format. You therefore do not need to re-save the desktop format itself if you only edit the interface or info area settings.

Click on  (**View**) to display an overview of the desktop format, see [Viewing and Printing Formats](#) in the *User Manual*.

Click on **Clear All** to revert to the default settings.

8. Click on **OK** to close the window and use apply the desktop format immediately. Click on **Cancel** to close the window without applying the desktop.
9. Assign the desktop to the appropriate users, groups and stations, see [Assigning Desktops](#).

Note: The **Define Desktop** dialog always displays all elements (levels, menu commands etc.) irrespective of the currently valid CRM process configuration, see [CRM Process Configuration](#) in the *CRM.core Administrator Guide*.

Desktop Access

Desktops can be assigned to users, groups and stations

For further details, see [Assigning Desktops](#).

Users can load any desktop they are permitted to access by selecting **Extras > Load Desktop** from the menu, see [Granting and Denying Access to Desktops](#).

Assigning Desktops

To assign a desktop format to be loaded at startup to a user, group or station:

1. Open the **Rights** module, see [Starting Modules](#) on page 13.
2. Switch to the desired user, group or station record.
3. Select the desired desktop format from the desktop format field.
4. Save the record.

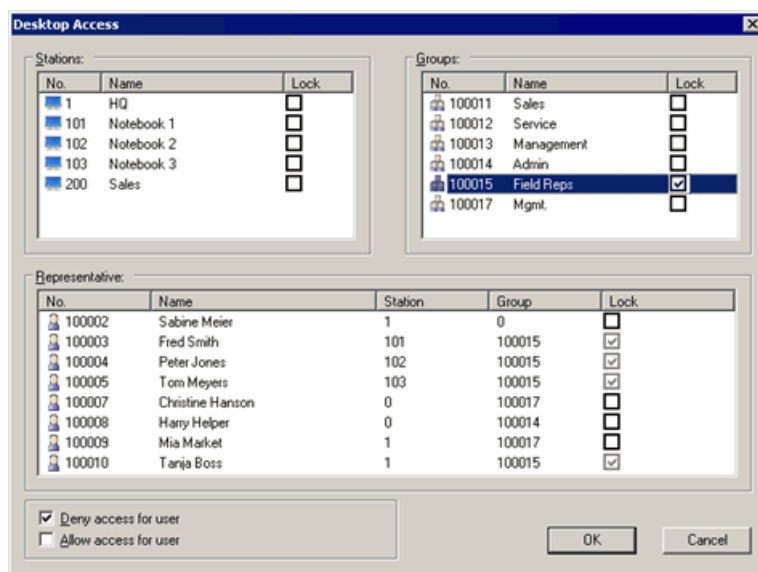
Desktop formats assigned to a user take precedence over desktop formats assigned to a group or station. Desktop formats assigned to a group take precedence over desktop formats assigned to a station. In other words, more specific settings take precedence over more general settings.

You can grant users, groups and stations permission to load other desktop formats in addition to their default desktop, see [Granting and Denying Access to Desktops](#).

Granting and Denying Access to Desktops

To deny or allow access to desktop formats for specific reps, groups and stations:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure access to.
3. Click the **Access** button.



All **Stations**, **Groups** and **Reps** are displayed.

4. Select one of the options at the bottom left:
 - **Deny access for user:** If this option is enabled, the **Stations**, **Groups** and **Reps** lists contain a column called **Lock**. Enable the check box to deny the station, group or rep access to the desktop format.
 - **Allow access for user:** If this option is enabled, the **Stations**, **Groups** and **Reps** lists contain a column called **Allowed**. Enable the check box to allow the station, group or rep to access the desktop format.

Note: **Deny access for user** is recommended if new users, groups and stations should generally be allowed to access the desktop. **Allow access for user** is recommended if new users, groups and stations should generally not be allowed to access the desktop.

5. Enable the appropriate check boxes in the **Stations**, **Groups** and **Users** lists.
If access is denied or permitted for a station or group, the access rights automatically apply to all the station or group's reps. In this case, the corresponding check boxes in the **Reps** list are enabled and grayed out.
6. Click on **OK**.
7. Save the desktop format.

Only those desktops a user is permitted to access are listed when selecting **Extras > Load Desktop** from the menu.

Navigation

The options under **Navigation** in the **Define Desktop** window are used to define start levels, the icon bar, and the **Info** menu in Aurea CRM win.

Fixed Icon bar

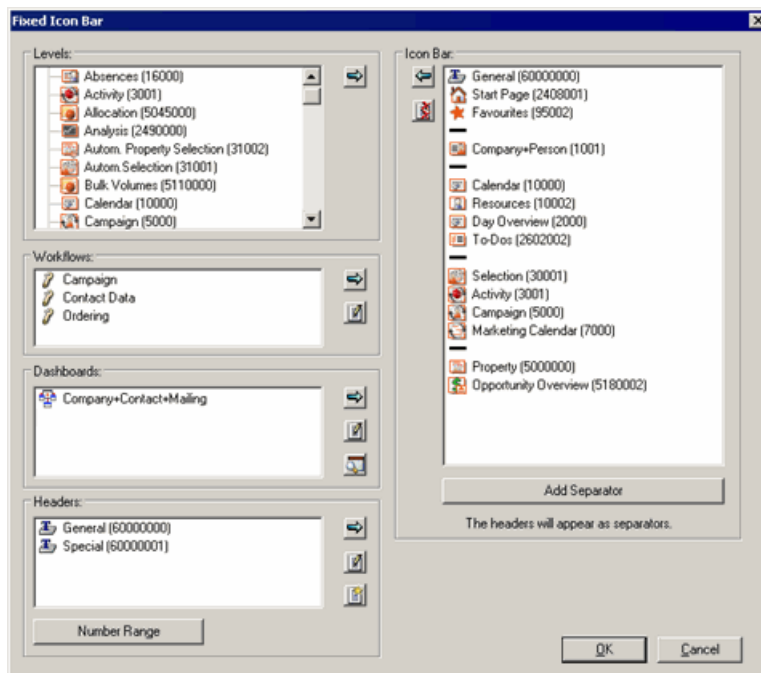
The icon bar contains a fixed section (top) and a level-dependent section (bottom). The fixed section is displayed on **every** level.

The following options are available from the **Navigation** section in the **Define Desktop** window:

- **No fixed icon bar:** Enable this option to restrict the icon bar to the level-dependent section.
- **No variable icon bar:** Enable this option to restrict the icon bar to the fixed section.
- **Transfer from root level:** Enable this option to determine that the level-dependent section is always transferred from the top-most level in the hierarchy (e.g. from the **Company+Person** level to the **Notes** level). If no level-dependent icon bar has been defined, the predefined Aurea CRM icon bar is used.




To configure the fixed section of the icon bar:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.
3. Click the **Fixed Icon Bar** button under **Navigation**.




- All independent levels that are accessible based on the desktop's settings are listed under **Levels**.
- All available **Workflows**, **Dashboards** and **Headers** are listed.



Select a dashboard in the **Dashboard** list and click on  (**View**) to display a preview, >> Dashboards in the User Manual.

- The current icons in the fixed section of the icon bar are listed under **Icon Bar**.
4. Click on  (**Properties**) next to the **Workflows**, **Dashboards** and **Headers** lists to edit the name and icon used by the entry, see [Element Properties](#).
The name and icon used by levels are defined in the level properties, see [Navigation Tab](#) on page 250.
 5. To define additional headers:
 - a. Click on  (**New**) to the right **Headers** list.
 - b. Enter the desired text in the **Text** field.
 - c. Click on **OK**.
 6. Click the **Number Range** button to define a range of IDs for headers in this desktop, to prevent overlaps in IDs between hierarchic desktops. Existing header IDs are adjusted accordingly, see [Extended Desktops](#) on page 299.
 7. You can determine that the headers (i.e. the individual menu groups) in the icon bars are minimized when Aurea CRM is started:
 - a. Select the desired entry under **Headers**.
 - b. Click on  (**Properties**).
 - c. Enable the **Contracted** check box.

Note: This setting is applied globally, irrespective of whether you enable the **Contracted** check box in the fixed icon bar settings, the fixed **Info** menu or level properties, see [Navigation Tab](#) on page 250.

- d. Click on **OK**.
8. Select an item in the **Levels**, **Workflows**, **Dashboards** or **Headers** list and click on  (**Add**) to add the entry to the icon bar. You can also double click on an item to add it to the icon bar.

Note: Workflows and dashboards are not displayed as active levels for technical reasons.

- Select an item in the **Icon Bar** list and click on  (**Delete**) to remove the entry.
- Click on  (**Delete all**) to delete all entries.
- Drag entries in the **Icon Bar** list to the desired position to change the order of the entries.
- Click on **Add Separator** to add a separator to the menu.

9. Click on **OK**.
10. Save the desktop format.


The level-dependent section of the icon bar is defined in the level properties, see [Navigation Tab](#) on page 250.

Fixed Info Menu


The **Info** menu contains a fixed and a level-dependent section.

The fixed section corresponds to the left portion of the **Info** menu. The fixed section is displayed on **every** level.

To configure the fixed section of the **Info** menu:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.
3. Click the **Fixed Info Menu** button under **Navigation**.
4. Levels, dashboards and workflows are added, deleted and ordered in the same way as in the fixed icon bar, see [Fixed Icon bar](#).
5. Select an entry in the **Workflows, Dashboards** or **Headers** list and click on  (**Properties**) to edit the name and icon used by the entry, see [Element Properties](#).

The name and icon used by levels are defined in the level properties, see [Navigation Tab](#) on page 250.


6. To insert a separator:
 - a. Click on  (**New**) to the right of the **Headers** list.
 - b. Enter the **Text**. (This text is **not** displayed in the **Info** menu.)
 - c. Click on **OK**.
 - d. Double-click on the entry to add it to the menu.
 - e. Drag the entry to the desired position in the **Info Menu** list.
A separator is displayed at this position in the **Info** menu.


7. Click on **OK**.
8. Save the desktop format.

The level-dependent section of the **Info** menu is defined in the level properties, see [Navigation Tab](#) on page 250.

Element Properties

To edit the properties of elements in the fixed icon bar or fixed **Info** menu:

1. Select the desired element in the window used to define the icon bar or **Info** menu.
2. Click on  (**Properties**) or right-click in the list and select **Properties** from the popup menu.
3. Enter the name of the new entry in the **Text** field.
Click on **Default Text** to revert to the original name.

4. Enter "&" preceding the letter to be used as a shortcut to access workflows and dashboards. (You need to use Ctrl+Shift+<letter> to access entries in the icon bar.)
5. Click on **Choose Icon** to select an icon to be displayed next to the text.
6. Choose a predefined icon from the list of **Available Icons** or click on  to load a bitmap.
Click on **Default Icon** to revert to the default icon.
7. Click on **OK**.

Start Levels

You can determine which levels, dashboards and workflows are opened automatically when the desktop is loaded:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.
3. Click the **Start Levels** button under **Navigation**.

All levels that are accessible based on the desktop's settings are listed under **Levels**.

4. Levels, dashboards and workflows are added, deleted and ordered in the same way as for the fixed icon bar, see [Fixed Icon bar](#).

Note: You need to first add any parent levels before you can add child levels. Otherwise you receive an error message.

5. Click on **OK**.
6. Save the desktop format.

Note: For users with a desktop format that includes start levels the **Load last settings** option at login has no effect. The defined start levels are loaded instead.

Global Settings

Learn how to configure global settings.

Configuring Menus

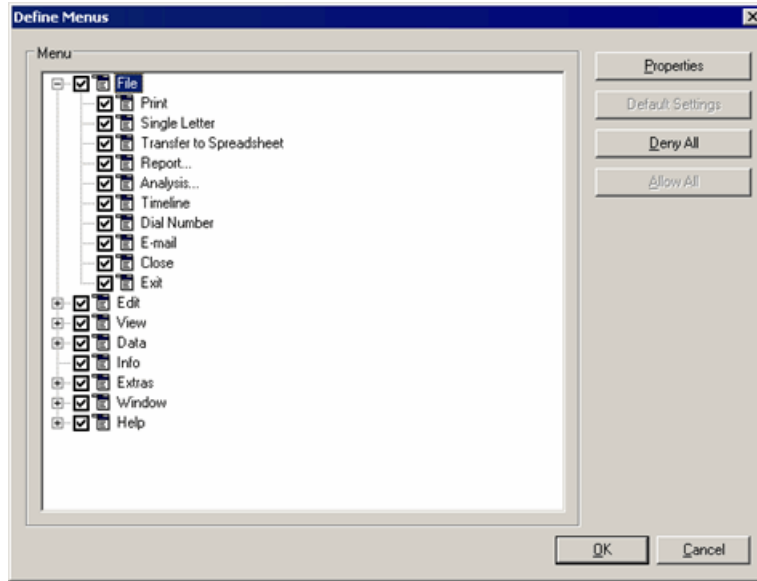
Learn how to configure and manage menus.

You can rename menu entries and prevent users from accessing them. Entries to which access is denied are grayed out in the menu.

To configure the menus in Aurea CRM win:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.

3. Click on **Menu** under **Global Settings**.



All available menu entries are listed under **Menu**.

4. Enable or disable the check boxes to grant or deny users access.

Click on **Deny All** to disable all entries. Click on **Allow All** to enable all entries.

5. To rename menu entries:

- a. Select the entry you wish to rename.
- b. Click on **Properties**.
- c. Enter the desired name in the **Text** field.
- d. Enter a **Hotkey**, if desired.

Click on **Default Settings** to revert to the default name and hotkey.

e. Click on **OK**.

6. Click on **Default Settings** in the **Define Menu** window to revert to the default settings at any time.

7. Click on **OK**.


8. Save the desktop format.

Configuring the User Interface

Learn how to configure and manage user interface.

To configure the Aurea CRM win user interface:

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.

3. Click on **User Interface** under **Global Settings**.
4. Define the necessary settings. The individual tabs are described below.
Click on **Reset All** to revert to the default settings.
5. Click on  (**Save**) next to the **Format Name** field to save the format, see [Saving, Loading and Deleting Formats](#) in the *User Manual*.
6. Click on **OK**.
7. Save the desktop format.

Note: If you are editing an existing format, you only need to save the user interface format and not the desktop format, as the desktop format only contains a reference to the user interface format.

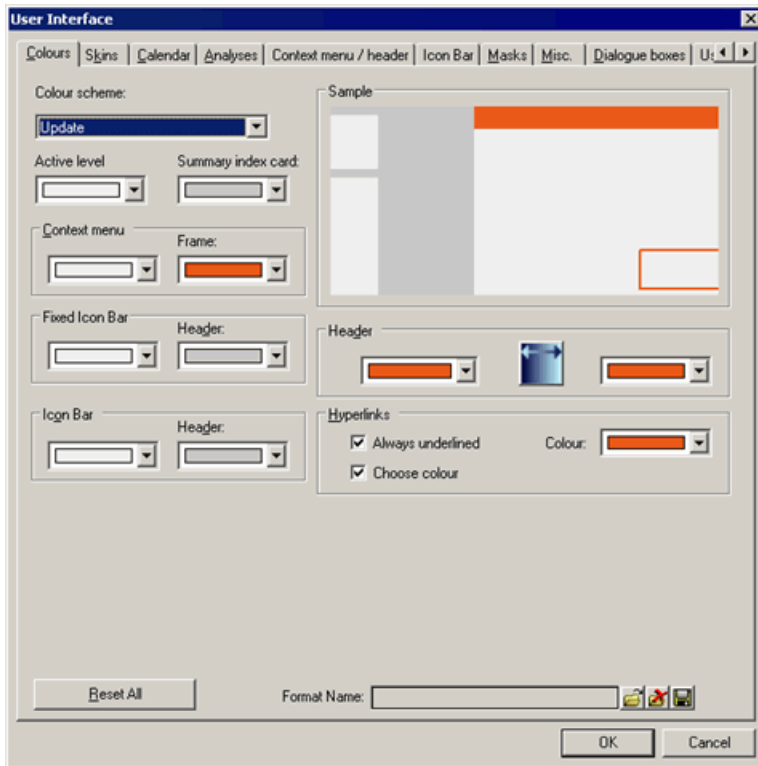
The settings are applied to all levels.


Users can configure some of the user interface settings themselves by selecting **View > Desktop Properties** from the menu, see [Configuring the Display](#) in the User Manual. These user settings are automatically saved for each user in an "Interface" format. The user settings take precedence over the desktop settings.

Colors Tab

Learn how to define the colors used by Aurea CRM win.

Use this tab to define the colors used by Aurea CRM win:



- **Color scheme:** Select a color scheme from the drop-down list.
- **Active level:** Background color of the active level.
The **Different background color for active info area** option on the **Misc.** tab must be enabled for this setting to take effect, see [Misc. Tab](#) on page 237.
- **Summary index card:** The color of the summary index card and the active level in the icon bar.
- **Context menu:** Background color of the context menu.
- **Frame:** Color of the context menu's border. Color of all-day appointments displayed in the calendar, see [All-day Appointments](#) in the *User Manual*.
- **Fixed Icon Bar:** Background color of the fixed icon bar and its **Header**.
- **Icon Bar:** Background color of the icon bar and its **Header**.
- **Sample:** Preview of your settings.
- **Header:** You can choose the colors used by the gradient in the header. Click on  to switch between a horizontal and a vertical gradient.
- **Hyperlinks:**
 - **Always underlined:** Determines whether links (e-mail address, URLs, links to other records) are always underlined.
 - **Choose color:** Enable this check box to be able to select a **Color** for hyperlinks.

Note: Users can change these color settings by selecting **View > Desktop Properties** from the menu. The user settings take precedence over the desktop settings. You can deny users' access to the **Colors** tab in the **Desktop Properties** window, see [User Rights Tab](#) on page 241.

To define a full color scheme, you also need to define settings for masks, lists and tables, see [Skins Tab](#) on page 226.

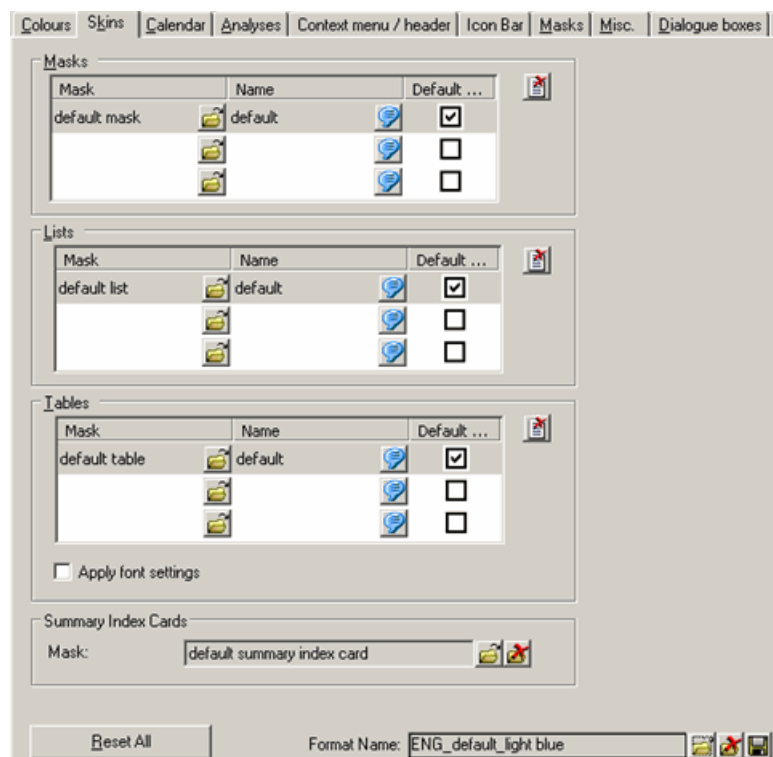
Skins Tab



Use the **Skins** tab to define global color schemes (skins) for masks, lists and tables.

For further details, see [Defining a Global Color Scheme](#) on page 205.


You can define up to three formats for each.

Users can change the color scheme by selecting **View > Desktop Properties** from the menu (**Colors** tab, **Global mask colors** section), see [Colors](#) in *Aurea CRM in the User Manual*.



1. Click on  (**Load**) in the **Mask** column to load an existing format. You can only select formats defined for the **Company+Person** level.
2. Click on  (**Multi-language input**) in the **Name** column and enter the name of the mask, list or table. If you do not enter a name, the mask, list or table is not listed in the **Desktop Properties** window.
3. Enable the check box in the **Default Value** column to determine which mask, list or table settings should be used by default.

Click on  (**Delete**) to delete the selected entry.

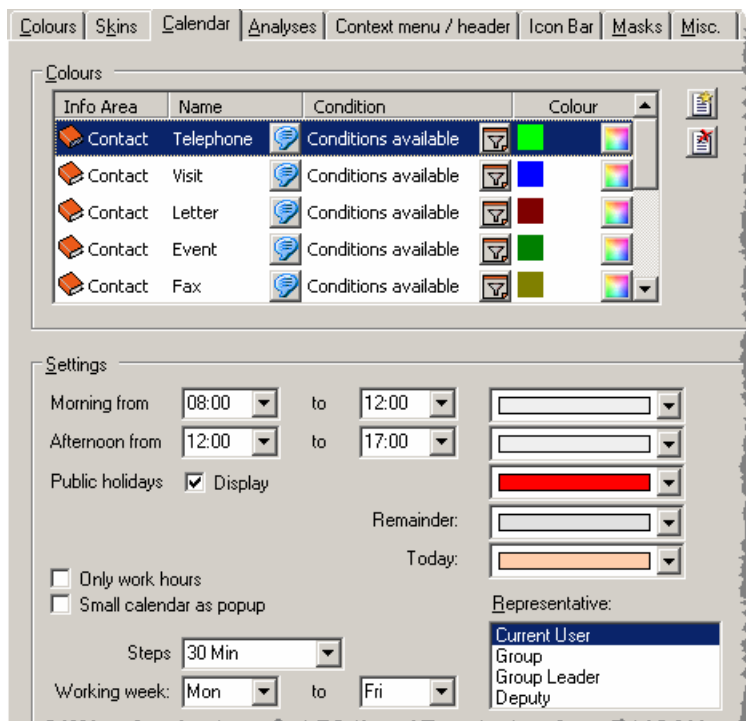
4. Enable the **Apply font settings** option in the **Tables** pane to apply the font settings defined for lists (list header and list rows) to tables, see [List Properties](#) on page 196.
5. Click on  under **Summary Index Cards** to load the summary index card to be used by default.
6. Save the format.

Calendar Tab

Use the **Calendar** tab to define the colors used by the calendar.




These settings are used in the **Calendar**, **Resource View** and **Overlapping Appointments** levels.

You can also define level-specific calendar settings, see [Calendar/Marketing Calendar Tabs](#) on page 284. If no specific settings have been defined for a level, the interface settings are used.



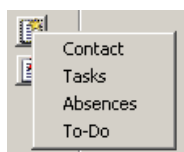
Colors

You can define different colors for the different types of appointments (activities, tasks, To-Dos, absences). A stripe in the chosen color is displayed to the left of the appointment. You can also define conditions to display appointments in specific colors if they meet certain conditions, e.g. "Visits" with the **Status** "Completed" are displayed in blue.

- Click on  (**Multi-language Input**) to edit the text of the appointment.
- Click  (**Condition**) to edit the condition.
- Click  (**Color**) to select the color.

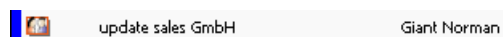
To define a color for a specific appointment type:

1. Click on  (**New**) and select the desired appointment type, e.g. **Activity**.




2. Enter a name for the appointment in the **Edit Text** window (e.g. "Visit") and click **OK**.
3. Define the condition, e.g. "Activity = Visit AND Status = Completed".
4. Select the desired color, e.g. blue.
5. Click on **OK**.
6. Save the interface format.

Visits with the status "Completed" are now displayed with a blue stripe in the calendar.



Settings



- **Morning from/to:** Determine the time period to be classified as morning and choose a color.
- **Afternoon from/to:** Determine the time period to be classified as afternoon and choose a color.
- **Public holidays:** Enable the **Display** check box and select a color to be used for public holidays.
- **Remainder:** Select a color to represent those times that are neither defined as morning nor afternoon etc.
- **Today:** Choose the color used to highlight the current date.
- **Only work hours:** Enable this check box to restrict the calendar display to those times defined as either morning or afternoon.

- **Small calendar as popup:** Enable this check box to determine that the small calendar is only accessible using  (**Popup Calendar**) in the appointment overview's command bar.

If this option is disabled, the small calendar is displayed at the bottom right.

- **Steps:** Determine whether the calendar should display intervals of 15 minutes, 30 minutes or 1 hour.
- **Working week/to:** Use these fields to determine which days of the week are considered workdays.
- **Representative:** Determine which appointments should be displayed in the calendar (the current rep's, the current rep's group's, the group leader's, and the current rep's deputy's appointments).

You can select multiple entries. If you do not select an entry, this is treated as selecting all entries.

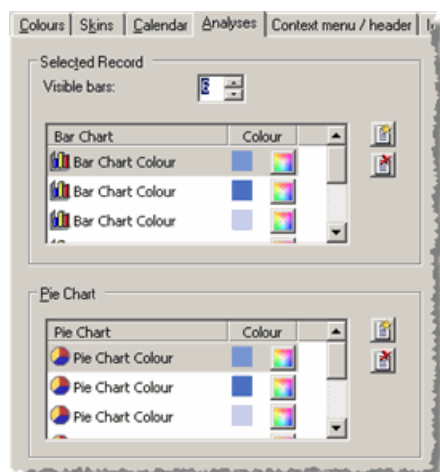
Note: Users can change these settings using the  (**Filter view**) and  (**Settings**) buttons in the **Calendar**, see [Appointment Settings](#) and [Calendar Interface Settings](#) in the User Manual. The user settings are saved in the `pro1.cfg` file in the user directory. The user settings take precedence over the desktop and interface settings.

You can deny users' access to the calendar settings, see [Calendar/Marketing Calendar Tabs](#) on page 284.

Analyses Tab




Use the **Analyses** tab to define the appearance of bar and pie charts in analyses.

These settings apply to all analyses (in the database and **Analysis** modules, and in the **Sales Funnel** info area in the BTB version).



- **Visible Bars:** Number of visible bars in bar charts. You can choose to display up to 10 bars.

This setting is ignored if you are using ComponentArt graphics.

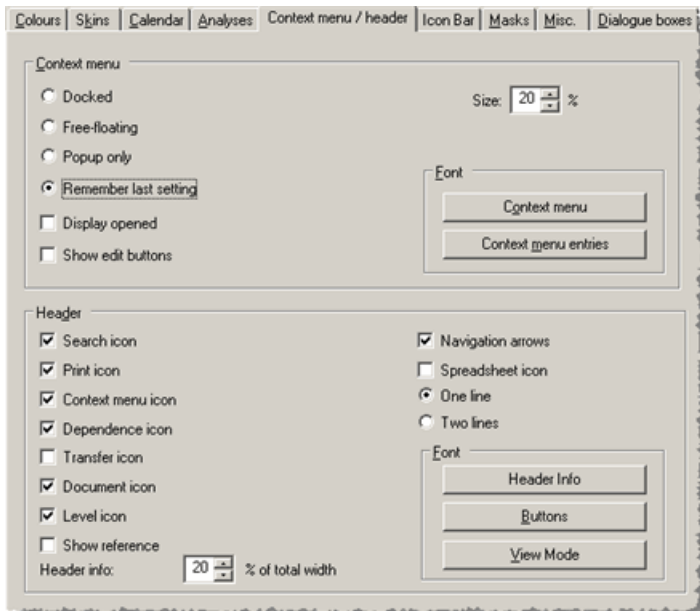
- Click on  (**New**) to define a new color for the bar or pie chart. The button is grayed out if you have already specified 10 colors, and you cannot define any further colors.
- Click on  (**Delete**) to remove the selected color from the list.
- Click on  to change a color.

Note: Users can change these settings by selecting **View > Desktop Properties** from the menu. The user settings take precedence over the desktop and interface settings.

You can deny users access to the **Analyses** tab in the **Desktop Properties** window, see [User Rights Tab](#) on page 241.

Context Menu/Header Tab

Use the **Context Menu/Header** tab to configure global settings for the context menu and header.



Context Menu

- **Docked:** The context menu is docked on the right edge of the mask when Aurea CRM is started.




The context menu can be positioned freely by dragging it to the desired position. If users switch to another info area and then return to the previous info area, the context menu is displayed at its last position.

- **Free-floating:** The context menu is displayed at the top left of the mask below the header when Aurea CRM is started.



The context menu can be positioned freely by dragging it to the desired position. If users switch to another info area and then return to the previous info area, the context menu is displayed at its last position.

- **Popup only:** Enable this option to determine that the context menu is only available as a popup menu and using the  (**Context Menu**) button.




Note: The context menu can always be accessed with a right-click in the mask or list, irrespective of the options enabled here.




- **Remember last setting:** The context menu is displayed in the same position as when Aurea CRM is closed when the application is started.
- **Display opened:** Enable this option to open the context menu when a level is opened.
- **Show edit buttons:** Determines whether the **Edit**, **Save**, **Load** and **Cancel** buttons are displayed in the context menu instead of as buttons in the header.

Note: You can also determine where the edit buttons are displayed for individual levels, see [Header Tab](#) on page 264. Level-specific settings take precedence over any settings made here.

- **Size:** Size of the context menu (between 20 and 40% of the width of the level).
- **Font:** Click the **Context Menu** button to configure the font, style, size, color etc. of the context menu's header. Click the **Context menu entries** button to configure the font, style, size, color etc. of the context menu entries.


Header

- **Search icon:** Determines whether the **Search** icon () is displayed in the header.
- **Print icon:** Determines whether the **Print** icon () is displayed in the header.
The **Print** button can also be displayed in the general toolbar, see [Configuring the General Toolbar](#) on page 241.
- **Context menu icon:** Determines whether the **Context Menu** icon () is displayed in the header.

- **Dependence icon:** Determines whether the **Dependence** icon () is displayed in the header.
- **Transfer icon:** Determines whether the **Transfer** icon () is displayed in the header.
- **Document icon:** Determines whether the **Document Overview** icon () is displayed in the header.
- **Level icon:** Enable this check box to display the corresponding icon next to the name of info area in the header.
- **Show reference:** Enable this check box to display the current record's reference in the header (e.g. "Company:<company name>" in the **Company+Person level**) instead of the name of the level.
- **Header info:** Determines what percentage of the entire width of the level header is taken up by the header info.

If the text is longer than the defined width, the text is truncated and "... " is appended to the text.

Note: If the **Only display icons** option is enabled for a level (see [Header Tab](#) on page 264), the **Level icon**, **Show Reference** and **Header info** settings are ignored.

- **Navigation arrows:** Determines whether the navigation buttons are displayed in the header. (This setting does not affect the navigation buttons in the summary index card, which are always displayed.)
- **Spreadsheet icon:** Determines whether the **Excel** icon () is displayed in the header.

Note: You can also determine whether the **Search**, **Print**, **Context Menu**, **Dependence**, **Transfer** and **Document Overview** buttons are displayed for individual levels, see [Header Tab](#) on page 264. Level-specific settings take precedence over any settings made here.

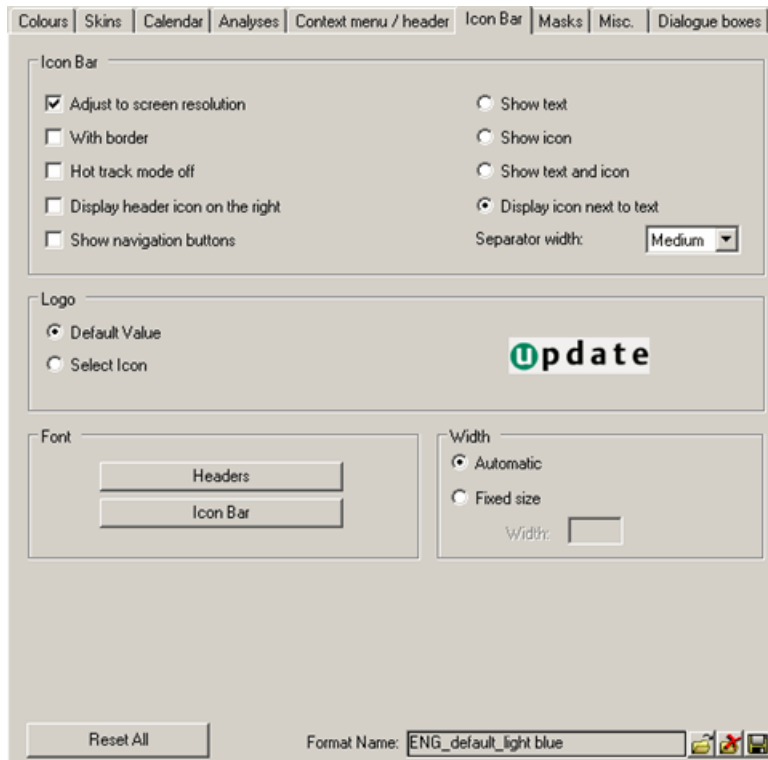
- **One line:** The header info is displayed in a single line.
- **Two lines:** The header info spans two lines.
- **Font:** Use these buttons to determine the font, size, color, etc. of the header info, header buttons and display information.

Note: Users can change some of these settings by selecting **View > Desktop Properties** from the menu. The user settings take precedence over the desktop and interface settings. You can deny users access to the **Context Menu/Header** tab in the **Desktop Properties** window, see [User Rights Tab](#) on page 241.

Icon Bar Tab

Learn how to configure the icon bar.

Use the **Icon Bar** tab to configure the icon bar:



Icon Bar

- **Adjust to screen resolution:** The width of the icon bar is adjusted according to the screen resolution.
- **With border:** The icons in the icon bar are displayed with a dark border (similar to buttons).
- **Hot track mode off:** Enable this option to display icons in color at all times. Otherwise icons are only displayed in color when the mouse cursor is moved over them or the corresponding level is active.
- **Display header icon on the right:** Determines that the header icon is displayed to the right of the header text (**General** -).
- **Show navigation buttons:** Enable this check box to use navigation buttons at the top and bottom of the icon bar to scroll the icon bar. If this option is disabled, a scroll bar is displayed to the left of the icon bar instead.
- **Show text:** Select this option to only display text entries the icon bar (left-aligned).
- **Show icon:** Enable this option to only display icons in the icon bar.
- **Show text and icon:** Both the text and icon are displayed in the icon bar (the text is centered beneath the icon).
- **Display icon next to text:** The text is displayed to the right of the icon.
- **Separator width:** The width of the separators between entries.

Logo

- **Default Value:** Enable this option to display the default Aurea logo at the top of the icon bar.
- **Change icon:** Enable this option to choose your own bitmap to display at the top of the icon bar.

Note: The maximum width of the logo is the width of the icon bar. The maximum height is 30 pixels. Larger images are scaled down accordingly.

Font

You can change the font, size, color etc. of the **Headers** (group titles) and entries in the **Icon Bar**.

Width

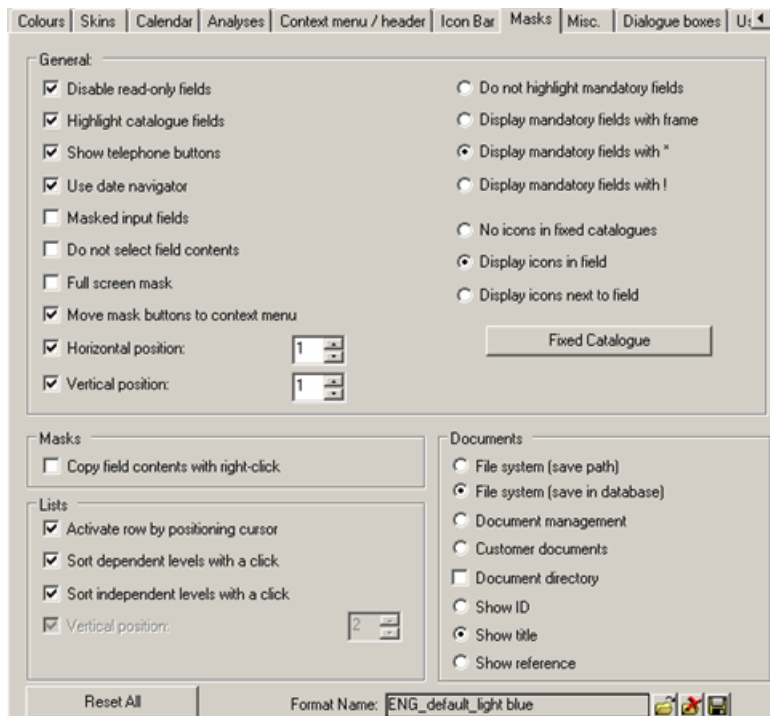
- **Automatic:** Select this option to determine the width automatically, based on whether the name, icon or both are displayed.
- **Fixed size:** Select this option to set the width of the icon bar to a fixed value. Enter the width in pixels in the **Width** field.

Note: Users can change some of these settings by selecting **View > Desktop Properties** from the menu. The user settings take precedence over the desktop and interface settings. You can deny users access to the **Icon Bar** tab in the **Desktop Properties** window, see [User Rights Tab](#) on page 241.


Masks Tab

Learn how to configure global settings for masks, lists and document fields.

Use the **Masks** tab to configure global settings for masks, lists and document fields:



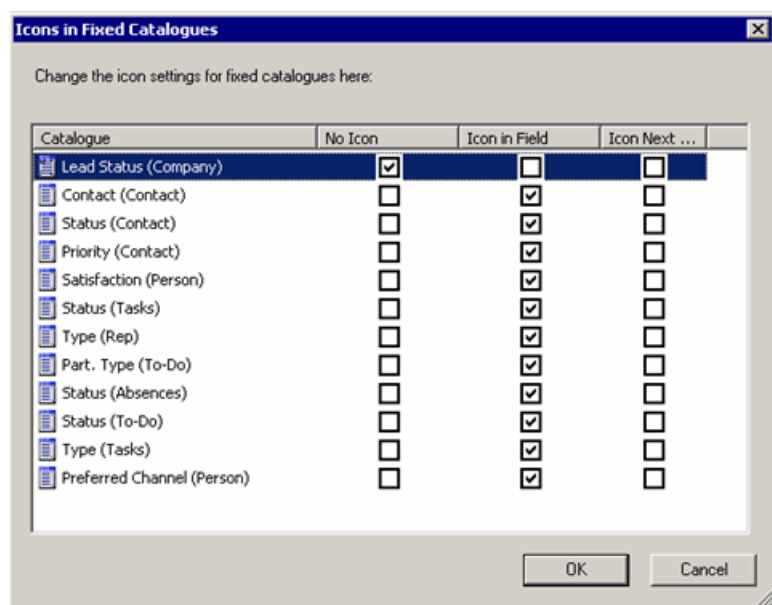
General

- **Disable read-only fields:** Determines whether read-only fields are displayed with a gray background in edit mode.
- **Highlight catalog fields:** Determines whether the color settings defined for catalogs in the mask (in the Mask Generator, **Tab Group Properties** window, **Colors** tab) are also applied to catalog fields in edit mode, see [Colors Tab](#) on page 224.
- **Show telephone buttons:** Determines whether the telephone icon is displayed in telephone fields. Click on  (**Make Call**) to dial the number. Note that CRM.phone must be installed.
- **Use date navigator:** Enable this option to use Aurea CRM's dedicated date and time fields, see [Entering the Date Directly](#) in the *User Manual*.
Disable the option to use normal input fields to enter date and time values.
- **Masked input fields:** Enable this option to use masks (input formats) defined for specific fields in the data model, see [Mask](#) in the **CRM.core Administrator Guide**.
- **Do not select fields contents:** Determines whether the field contents in masks, lists and tables are automatically selected when a field receives focus.
- **Full screen mask:** Enable this check box to adjust the mask to the screen resolution, see [Screen Resolution](#).
- **Move mask buttons to context menu:** Enable this option to determine that buttons defined in individual masks are only displayed as entries in the context menu. This setting can be overridden by individual buttons by enabling the **Never in context menu** option in the Mask Generator, see [Button Properties](#) on page 188.
- **Horizontal/Vertical position:** Determine how far (in grid units, see [Grid Units](#)) the mask should be displayed from the left and top edge of the window. This

settings can be changed for individual masks (**Position and Size** section) in the Mask Generator, see [Mask Properties](#) on page 175.

- **Do not highlight mandatory fields:** Mandatory fields are not highlighted.
- **Display mandatory fields with frame:** A frame is displayed surrounding mandatory fields. The color of the frame is defined in the Mask Generator (**Tab Group Properties**), see [Colors Tab](#) on page 224.
- **Display mandatory fields with *:** Mandatory fields are indicated using "*".
- **Display mandatory fields with !:** Mandatory fields are indicated using "!".
- **No icons in fixed catalogs:** Displays catalogs without icons.
- **Display icons in field:** Displays icons directly in catalog fields.
- **Display icons next to field:** Displays catalog icons to the right of catalog fields.

Click on **Fixed Catalog** to configure the icon settings for individual catalogs:



These settings take precedence over the global settings (**No icons in fixed catalogs**, **Display icons in field** and **Display icons next to field**).

Masks

Copy field contents with right-click: Enable this check box to allow users to copy the contents of read-only and link fields to the clipboard by selecting **Copy** from the popup menu.

Lists


- **Activate row by positioning cursor:** Enable this check box to allow users to select a record by positioning the mouse over the left border of the list.
- **Sort dependent levels with a click:** Enable this check box to allow users to sort dependent levels by clicking on column headers in list view, see [Sorting Records](#) in the *User Manual*.

-
- **Sort independent levels with a click:** Enable this check box to allow users to sort independent levels by clicking on column headers in list view, see [Sorting Records](#) in the *User Manual*.
 - **Vertical position:** Determines how far from the top edge of the window the mask should be displayed. The units are grid units, see [Grid Units](#).
-




Note: This option is only available if the **Vertical Position** option in the **General** pane is disabled.

Documents

Use these options to determine where users can search for documents and what information is displayed in document fields, see [Document Management](#) in the *User Manual*.

- **File system (save path):** Clicking on  (**Load**) in document fields allows user to search for documents in the file system. The path to the file is entered in the document field; the document is not uploaded to the database.
-

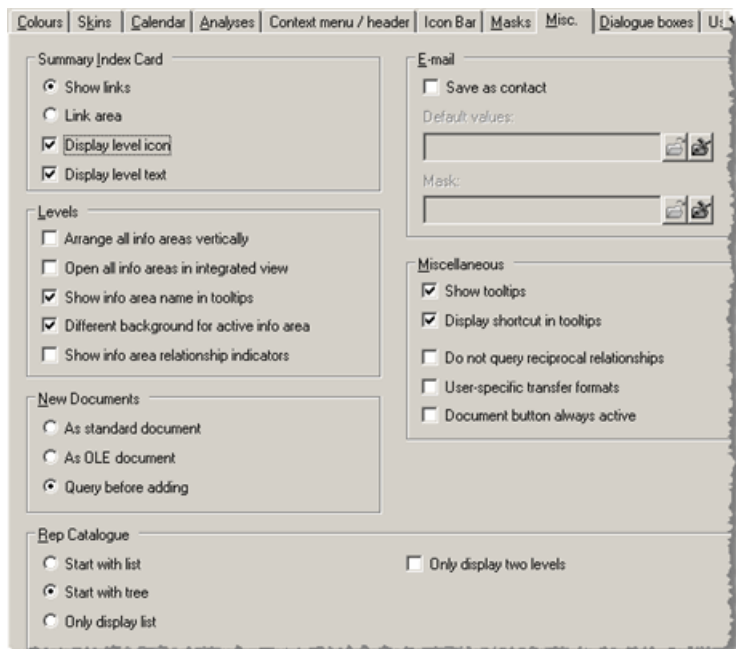
Note: Select a field with at least 256 characters to display the path.

- **File system (save in database):** Clicking on  (**Load**) in document fields allows user to search for documents in the file system. The selected document is saved in the database.
- **Document management:** Clicking on  (**Select Document**) opens the search mask for the **Document** info area.
- **Customer documents:** Clicking on  (**Select Document**) opens the search mask for the **Customer Document** info area. This is only possible if the current info area is dependent on the **Company** or **Person in Company** info area.
- **Document directory:** Enable this option to determine that the directory specified under **Extras > Document Directories** is opened when adding external documents. Otherwise the **My Documents** directory is opened.
- **Show ID:** Enable this option to display the document ID (e.g. A100-1) in document fields.
- **Show title:** Enable this option to display the name of the document in document fields. This setting only applies to view mode. The document ID is always displayed in new and edit mode.
- **Show reference:** Enable this option to display the document's reference in document fields. This setting only applies to view mode. The document ID is always displayed in new and edit mode.

Misc. Tab

Learn how to configure additional global interface settings.

Use the **Misc.** tab to configure additional global interface settings:



Summary Index Card

- **Show links:** Enable this option to determine that links to the parent record are displayed in the summary index card. Users can click on a link to switch to the parent level, >> Summary Index Card in the User Manual.
- **Link area:** Enable this option to determine that users can click anywhere in the summary index card to access the parent level. No links are displayed in the summary index card.
- **Display level icon:** Determines whether the parent level's icon is displayed in the summary index card.
- **Display level text:** Determines whether the name of the parent level is displayed in the summary index card.

Levels

- **Arrange all info areas vertically:** Enable this option to determine that the parent level is displayed to the left of child levels. If this option is disabled, the parent level is displayed above the child levels.
- **Open all info areas in integrated view:** Determines whether all levels are opened in integrated view, >> Integrated View in the User Manual.
- **Show info area name in tooltips:** Determines whether the name of the level is displayed when the positioned anywhere over the mask or list background.
- **Different background for active info area:** By default, levels are displayed with the background defined for the corresponding mask, see [Mask Properties](#) on page 175. If this option is enabled, the color selected under **Active Level** on the **Colors** tab in the user interface settings is used instead, see [Colors Tab](#) on page 224.
- **Show info area relationship indicators:** Enable this option to display a small arrow pointing from the parent to child info area in integrated view.

New Documents

You can determine whether document records should be added **As standard documents, As OLE documents** or whether the user should decide (**Query before adding**), see [Document Management](#) in the *User Manual*.

Rep Catalog

If the database contains a large number of reps, opening the rep catalog in tree view can impact on performance, see [Rep List](#) in the *User Manual*.

If more than 10,000 entries are present, a warning is displayed, and the user can decide to cancel the process. Only the first 70 dependent entries are displayed for each entry.

The following options are available:

- **Start with list:** The rep list is displayed as a list.
- **Start with tree:** The rep list is displayed as a tree.
- **Only display list:** The rep list is opened as a list, and users cannot switch to the tree view.
- **Only display two levels:** Enable this option to determine that the display is limited to two levels in the hierarchy: a user and that user's group. If this option is disabled, the hierarchy is not limited to two levels, and each branch can be expanded further.
- **Start with rep view:** When opening the rep list in tree view, reps are listed on the top-most level.
- **Start with group view:** When opening the rep list in tree view, groups are listed on the top-most level.

E-mail

- **Save as activity:** Enable this option to determine that the **Activity** level should be opened in new mode if a user clicks on the link or e-mail icon in an e-mail field.
- **Default values:** Specify any default values for activities added by clicking in e-mail fields, see [Defining Default Values](#) in the *User Manual*.
- **Mask:** Select the mask to be used when adding the activity record.

Miscellaneous

- **Show tooltips:** Determines whether tooltips are displayed, e.g. for entries in the general toolbar and icon bar.

Note: You need to select a Unicode font for tooltips in the Windows display settings to display double-byte characters in tooltips.

- **Display shortcut in tooltips:** Determines whether keyboard shortcuts are also displayed in tooltips.
- **Do not query reciprocal relationships:** Whenever a relationship is added, the system asks the user whether a reciprocal relationship should be added as well.

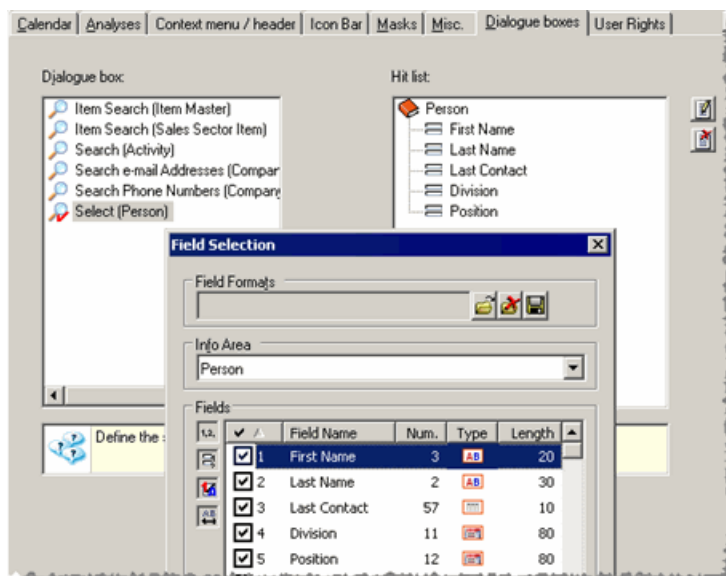
Enable this option to suppress the prompt. The reciprocal relationship is then added automatically, see Relationships in the *User Manual*.


- **User-specific transfer formats:** When loading transfer formats, the **Global formats** option is enabled by default, see [Global Formats](#) in the *User Manual*. Enable this option to determine that the **Global formats** option should be disabled by default.
- **Document button always active:** By default, the **Document** context menu entry (or button) is only active if documents are present for the current record. Enable this option to determine that the **Document** context menu entry (or button) should always be active. This setting can improve performance when switching between records, as the system no longer checks whether any documents are present for the current record.

Dialog Boxes Tab

Learn how to configure multiple search windows in Aurea CRM win.

Use the **Dialog boxes** tab to configure a number of the search windows in Aurea CRM win:



1. Select the desired search from the **Dialog box** list.
2. Click on  (**Edit**).

The **Field Selection** is displayed.

3. Select the fields to be displayed in the search results or load an existing field format.
4. Click on **OK**.

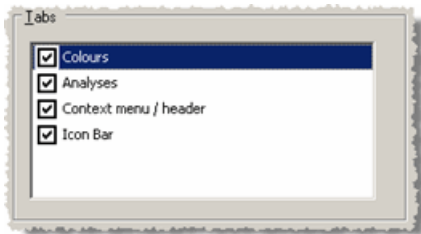
The selected fields are listed under **Hit List**.

5. Save the interface format.

User Rights Tab

Use the **User Rights** tab to determine which tabs users can access in the **Desktop Properties** window

For further details, see [Configuring the Display](#) in the User Manual.



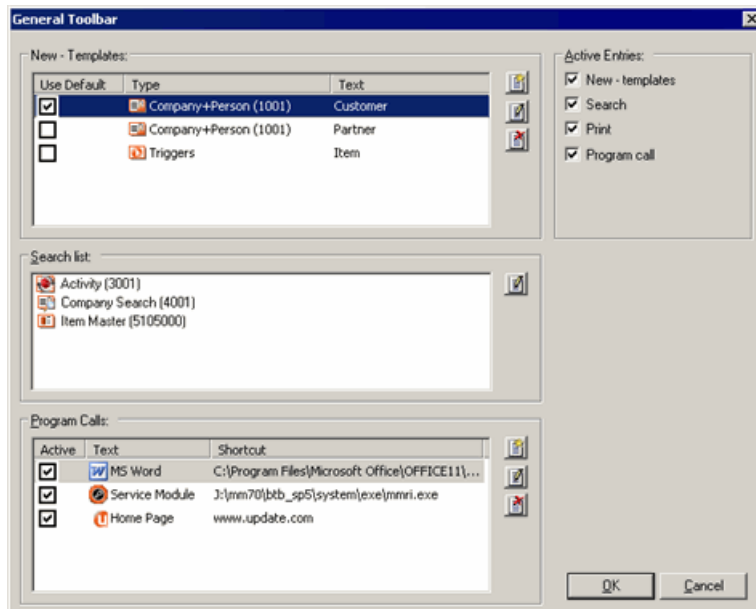
Enable the corresponding check box under **Tabs** to allow users to access the tab. If you deny access to all tabs, the **View > Desktop Properties** menu option is set inactive.

Configuring the General Toolbar





Learn how to define buttons in general toolbar.

To define the buttons in the general toolbar (see [General Toolbar](#) in the User Manual):

1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.
3. Click on **General Toolbar** under **Global Settings**.

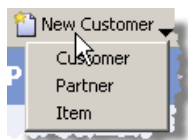


4. Define the desired buttons:

- Click  (**New**) under **New - Templates** to define a button used to add new records, see [New - Template](#) on page 242.
- Click  (**Edit**) under **Search list** to define a button used to search in specific levels, see [Search](#) on page 244.
- Use the **Print** check box under **Active Entries** to determine whether the  (**Print**) button is displayed in the general toolbar, see [Printing](#) in the User Manual.
- Click  (**New**) under **Program Calls** to define a new program call button, see [Program Calls](#) on page 245.

Drag entries in the **New - Templates** and **Program Call** lists to change their order.

5. Enable the corresponding **Use Default** check box under **New - Templates** to determine which template is accessed if a user clicks on the **New** button in the general toolbar directly (as opposed to selecting an entry from the list).



6. Enable and disable entries in the **Active Entries** pane to disable certain buttons without needing to remove them from the desktop format.
7. Use the **Active** check box under **Program Calls** to enable or disable individual entries.
8. Click on **OK**.
9. Save the desktop format.

The defined buttons are available in all levels.

New - Template

Global new templates allow users to add new records without needing to switch to the corresponding level.

For example, you could define new templates for different types of companies (customers, partners etc.) that open a mask with suitable default values.

New template buttons can only be added to the general toolbar for independent levels. (For details on defining level-dependent new templates, see [New - Templates Tab](#) on page 277.)

You can also use new template buttons to initiate triggers and workflows.

To define a new template button:

1. Click on  (**New**) under **New - Templates** in the **General Toolbar** window.

The screenshot shows the 'New - Templates' dialog box. It features a 'Name' input field at the top. Below this is the 'Default View' section, which includes a 'Level' dropdown menu currently set to 'Company + Person', a 'Mask' input field, and an 'Automatically save records' checkbox. A table below the 'Default View' section lists 'Info Area' (Company, Person), 'Default Value' fields, 'User Default Values' checkboxes, and 'Trigger' fields. At the bottom of the dialog are 'Trigger' and 'Workflow' sections, each with an input field and a button. A yellow tooltip is visible over the 'Trigger' field, containing the text 'Choose an interactive trigger for adding new records here.'

2. Enter a **Name**.
3. Select the **Level** the new record should be added in. You can only select independent levels.
4. Enable the **Automatically save records** check box to determine that records are added using the default values and saved automatically.

Example: Certain standard tasks (e.g. writing minutes for a meeting) can easily be created and saved with just a single click.

5. Select the **Mask** to be displayed when adding the record. If you do not choose a mask, the standard mask is used.
6. The info areas that new records can be added to are listed in the **Info Area** column. The available info areas depend on the selected **Level**. Enable the corresponding check boxes next to the info areas.

For example, the **Company** and **Person in Company** info areas are available in the **Company+Person** level. If you enable both **Company** and **Person in Company**, a new company with a new person is added. If you only enable **Person in Company**, only a new person is added (to the current company).

7. Load a set of **Default Values** for the new record or enable the **User Default Values** check box to apply the default values defined by the user, see [Defining Default Values](#) in the User Manual.

All default values are applied to the new record in the following order:


- a. user-defined defaults,
- b. default values defined in the **Rights** module,
- c. default values of triggers defined in the access rights, if no trigger is selected under **Trigger** (see below),
- d. the default values selected in the **Default Value** field or the default values assigned to the trigger selected under **Trigger** (see below).

8. You can choose a non-interactive trigger to be executed in the mask, see [Defining Triggers](#) in the *CRM.core Administrator Guide*.

Note: You can only select triggers defined for the corresponding info area. Alternatively, enable the **Trigger** radio button and select a non-interactive new template trigger.

9. Click on **OK**.
10. Save the desktop format.

To start interactive triggers or workflows using a new template button:

1. Click on  (**New**) under **New - Templates** in the **General Toolbar** window.
2. Enter a **Name**.
3. Enable either the **Trigger** or **Workflow** radio button.
4. Load the desired format.

Note: You can only load interactive triggers that contain the **Action** "Add new", see [Add New](#) in the *CRM.core Administrator Guide*.

5. Click on **OK**.
6. Save the desktop format.

Note: If you define a global new template for the **Resources** level, you can also access the **Search** drop-down list, see [Special Case: New Templates in the Calendar](#).

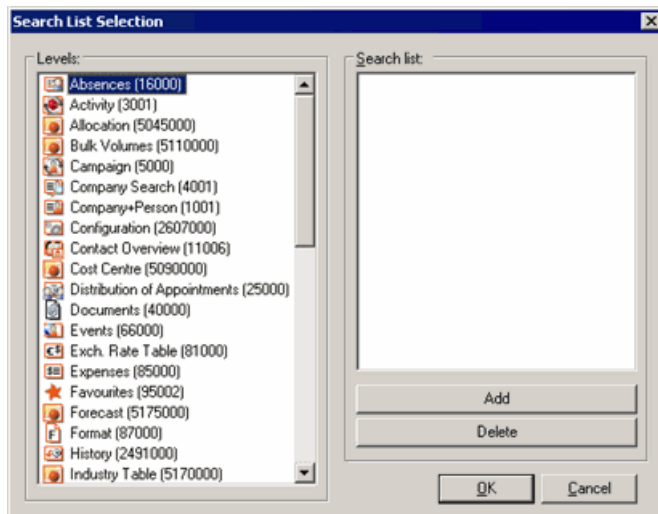
Search

You can add buttons to the general toolbar used to search in certain levels.

This allows users to search for specific information (e.g. companies or activities) from within any level. If a special search exists for the level (e.g. the company search), this search is opened, otherwise the default search mask for the level is opened, see [Searching](#) in the User Manual.

To define a search button:

1. Click on  (**Edit**) under **Search list** in the **General Toolbar** window.



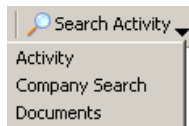
2. Select the **Level** to search in using the button.
3. Click **Add**. (Alternatively, double-click on the desired entry.)

The selected level is listed under **Search list**.

Double click on an existing entry, or select the entry and click on **Delete** to remove the entry again. Drag entries in the **Search list** to change their order.

4. Click on **OK**.
5. Save the desktop format.

A search button is displayed in the general toolbar that provides access to the selected entries:

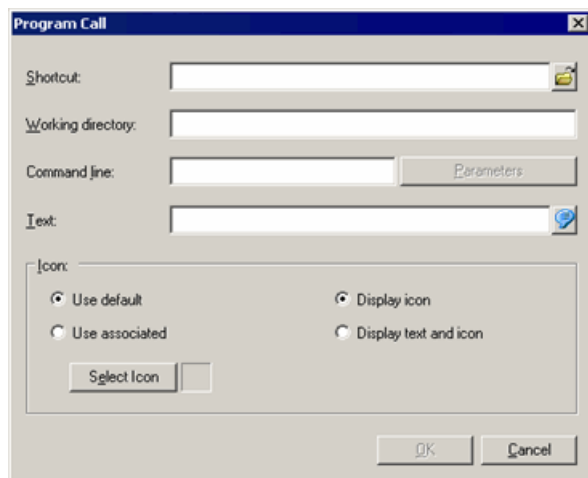


Program Calls

You can add buttons to the general toolbar that open external applications, other Aurea CRM modules or web pages. You can define up to 20 program call buttons.


To define a program call button:

1. Click on  (**New**) under **Program Calls** in the **General Toolbar** window.

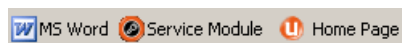


2. Enter the path to the desired application in the **Shortcut** field or click on  (**Load**) to select the target file (*.exe, *.com or *.bat) .

To open a web page, enter the target URL in the **Shortcut** field. (Leave the **Working directory** and **Parameters** fields empty in this case.)



3. If you selected a target using the  (**Load**) button, the **Working directory** is entered automatically. Otherwise enter the desired path.
4. Enter any parameters in the **Parameters** field.
5. Enter the **Text** to be displayed on the button.
6. Determine what should be displayed on the button under **Icon**:
 - **Use default:** The default icon for program calls is displayed.
 - **Use associated:** The icon associated with the application is displayed.
 - **Select Icon:** Click on this button to choose from the predefined icons or to load your own bitmap.
7. Enable the **Display icon** option to display just the icon. Enable the **Display text and icon** option to display both the text and the icon.
8. Click on **OK**.
9. Click on OK in the **General Toolbar** window, and save the desktop format.

The program calls are displayed in the toolbar:



Opening Documents

You can open documents using buttons in the general toolbar:

1. Click on  (**New**) under **Program Calls** in the **General Toolbar** window.
2. Click on  (**Load**) to the right of the **Shortcut** button.
3. Select the desired document.
4. Enter a **Text** for the button and select and configure the **Icon** settings.
5. Click on **OK**.
6. Click on **OK** in the **General Toolbar** window, and save the desktop format.


The button is displayed in the general toolbar: 

Accessing Records

You can access Aurea CRM records that are required frequently using buttons in the general toolbar:

1. Switch to the desired record.

Note: You can only access records in independent info areas from the general toolbar.

2. Select **Edit > Copy Link to Clipboard** from the menu.
3. Select **Extras > Define Desktop** from the menu.
4. Load the desktop format you wish to configure.
5. Click the **General Toolbar** button.
6. Click on  (**New**) in the **Program Calls** pane.

Click in the **Shortcut** field and press Ctrl+V or select **Paste** from the popup menu to paste the link to the record.

7. Enter a **Text** for the button and select and configure the **Icon** settings.
8. Click on **OK**.
9. Click on **OK** in the **General Toolbar** window, and save the desktop format.

The button is displayed in the general toolbar: 

Level Properties

Levels display data from one or more info areas (e.g. **Company+Person**).

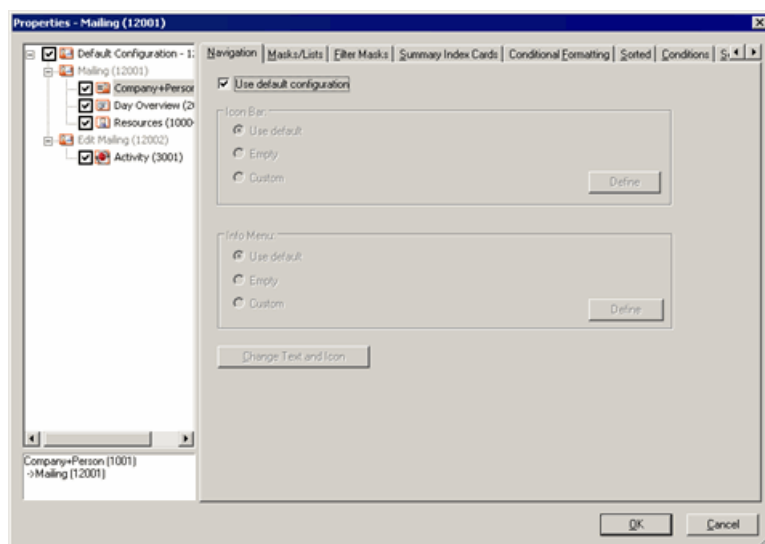
You can customize levels in the Aurea CRM win main module:

1. Switch to the level you wish to configure.
2. Select **Extras > Define Desktop** from the menu, see [Defining a Desktop](#) on page 215.
3. Load the desktop format you wish to configure.

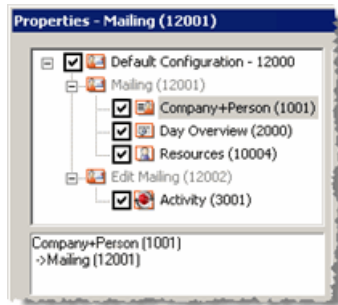
If a level's properties have been configured, a small red tick is displayed below the level icon.

4. Click the **Level Properties** button or double-click on the desired level in the list of **Available Levels**. (You can also right-click on the level and select **Properties** from the popup menu.)

The **Properties - <Level (ID)>** window is opened.



5. All "variations" of the selected level are displayed to the left:



- The level class as "Default Configuration" (in this case with ID "12000" for **Mailing**).
- The levels included in this level class (in gray): in this case **Mailing** and **Edit Mailing** (IDs "12001" and "12002").
- The parent levels: The **Mailing** level can be opened from the **Company+Person**, **Day Overview** and **Resources** levels; the **Edit Mailing** level can be opened from the **Marketing Activity** level.

The currently active combination of parent levels and levels is displayed below the tree.

6. Select the desired entry:
 - Click on the **Default configuration** entry to change common settings for all variations of the selected level.
 - Click on one of the available parent levels to change the settings (e.g. buttons) for that combination of parent level and level **only**.
7. You need to disable the **Use default configuration** check box before you can configure settings for a specific combination of level and parent level.
8. Configure the desired settings. The individual tabs are described in the following sections.

Note: Not all tabs are available for all levels. For example, you cannot access the **Search** tab for levels without a search function (e.g. **Appointment Overview**, **Calendar**, etc.).

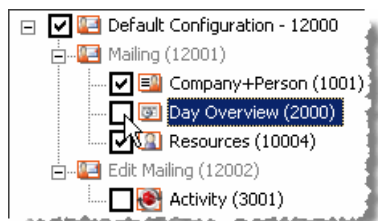
9. Click on **OK** in the **Properties - <Level (ID)>** window.
10. Save the desktop format.

Denying Access to Levels

Learn how to deny access to specific levels in the desktop settings.

These settings are cumulative, i.e. if access is denied to levels in a parent desktop, access is also denied to these levels in any child desktops, see [Extended Desktops](#) on page 299.

- Disable the appropriate check boxes to deny access to the combination of levels:



In this example, the user cannot access the **Mailing** level from the **Day Overview** level, nor the Edit **Mailing** level from the **Marketing Activity** level.

If you disable the check box next to the **Default Configuration** entry, the user cannot access the level at all.

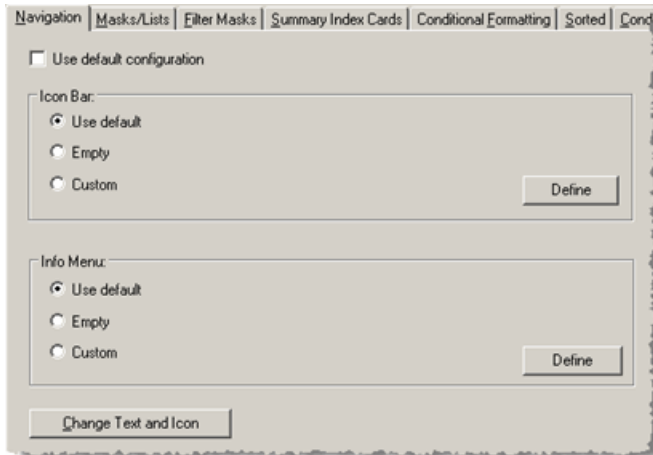
Note: These desktop settings only deny access to levels, not to info areas. Info area access is defined in the **Rights** module, see Defining Rights at the Info Area Level in the *CRM.core Administrator Guide*. If you deny access to the **Activity** info area, access is automatically denied to all levels that display activity data (**Day Overview**, **Activity Overview** etc.).

You can grant access to processes (levels, menu options, buttons) in the **CRM Process Configuration** level, either across the entire system or for specific roles, see [CRM Process Configuration](#) in the *CRM.core Administrator Guide*.

Navigation Tab

Use the **Navigation** tab to configure the level-dependent section of the icon bar and **Info** menu.

Level dependent sections are only displayed in the specific level they are defined for. The level-dependent section of the icon bar is displayed below the fixed section; the level-dependent section of the **Info** menu is displayed to the right of the fixed section.



Icon Bar/Info Menu

- **Use default:** Determines that the default Aurea CRM settings are used.
- **Empty:** Determines that the level-dependent sections of the icon bar and **Info** menu are not displayed.
- **Custom:** Click the **Define** buttons to configure the level-dependent section of the icon bar and **Info** menu. Define entries in the same way as for the fixed section, see [Fixed Icon bar](#) and [Fixed Info Menu](#).

You can add the following levels to the icon bar and **Info** menu:

- all independent levels,
- all levels that are children of the current level,
- the current level's parent level.

You can copy the icon bar and **Info** menu settings to other levels:

1. Select the level whose settings you wish to copy in the **Define Desktop** window.
2. Select **Copy Icon Bar and Info Menu** from the popup menu.
3. Select the level you wish to apply the settings to.
4. Select **Insert Icon Bar and Info Menu** from the popup menu.

Note: Entries that open dependent levels are not copied if the levels are not dependent on the target level. Example: The **Company+Person** icon bar accesses the **Activity** level; this entry is not copied to the **Absence** level.

Change Text and Icon

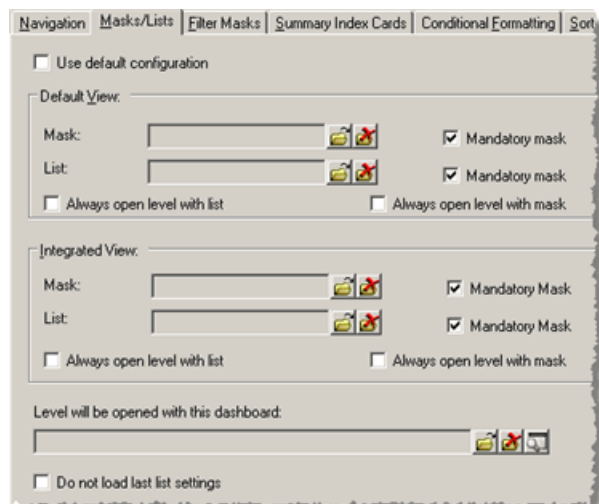
Click the **Change Text and Icon** button to change the keyboard shortcut and the text and icon displayed. Configure the text and icon as for the fixed section of the icon bar and **Info** menu, see [Element Properties](#).

Masks/Lists Tab

Use the **Masks/Lists** tab to determine the mask and list formats.

used by the **Default View** (each level in a separate window) and **Integrated View** :

For further details, see [Integrated View](#) in the *User Manual*.



Default View/Integrated View:

Mask: Select the original mask (accessible via **View > Original Mask** from the menu).

List: Select the list to be used.

Mandatory mask: Enable the **Mandatory mask** check box to determine that the user cannot load another mask. If the check box is disabled, the mask is defined as the original mask. The original mask is loaded the first time a level is opened, and can be reloaded at any time by selecting **View > Original Mask** from the menu.

Note: By default, all settings defined by users under **View > Define List Format** (font, number and contents of columns, sum total etc.) are applied from the user's settings. Enable the **Do not load last list settings** check box to prevent user settings from being applied.

Always open level with list: Determines whether the level is always opened in list view.

Always open level with mask: Determines whether the level is always opened in mask view.

Note: These options are not available in levels that do not provide an integrated or mask view (e.g. the company search, **Day Overview** etc.).

For more information on masks and lists, see [Masks](#) and [Lists](#) in the User Manual.

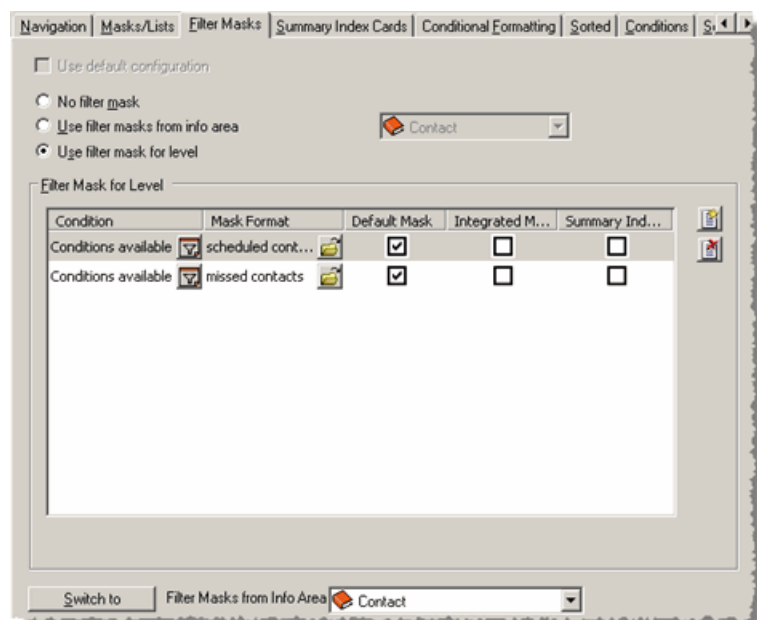
Level is opened with this dashboard: Select the dashboard the level should be opened with.

Do not load last list settings: Enable this option to prevent user-specific list settings (font, number and contents of columns, total lines etc.) from being applied the next time the level is opened, see [Lists](#) in the *User Manual*.

Filter Masks Tab

Use the **Filter Masks** tab to define filter masks for the level.

Filter masks are masks that display suitable information based on conditions such as the type and status of records. For example, you could determine that activities are displayed with different fields, colors etc. in the **Activity Overview** depending on whether the activity's status is "Missed" or "Scheduled".



The following options are available:


- **No filter mask:** No filter mask is used.
- **Use filter masks from info area:** The filter masks defined for an info area in the level are used, see [Filter Masks Tab](#) on page 296.
- **Use filter masks for level:** The filter masks defined for the level are used.

To use filter masks defined in the info area settings:

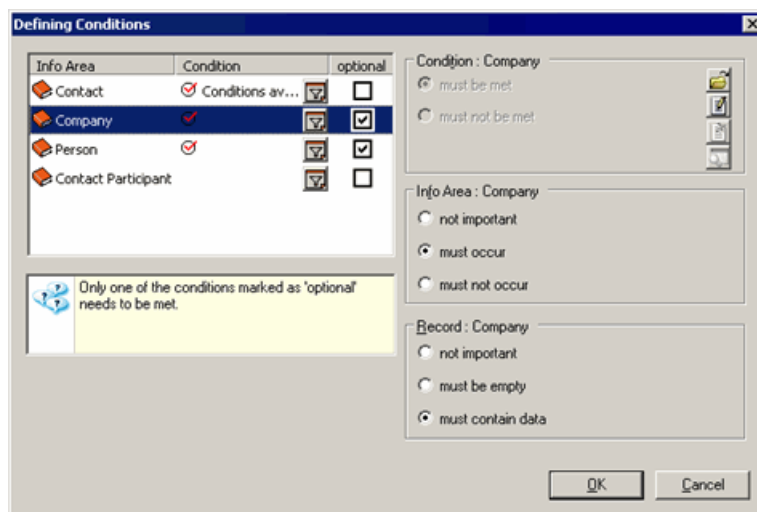
1. Enable the **User filter masks from info area** option.
2. Select the info area whose settings you wish to use from the drop-down list. (Alternatively, select an info area from the **Filter Masks From Info Area** drop-down list and click on **Switch to** to display and edit the settings for the info area.)
3. Click on **OK**.
4. Save the desktop format.

Note: If the desktop is an extended desktop, enable the **Inherit configuration** option to inherit the filter masks from the parent desktop as opposed to from the info area settings, see [Extended Desktops](#) on page 299.



To define filter masks for a level:

1. Enable the **User filter masks for level** option.
2. Click on  (**New**) to the right of the **Filter Mask for Level** list.
3. Select **Default Mask**, **Integrated Mask** or **Summary Index Card** from the popup menu.

The **Define Conditions** window opens.



The info areas present in the level are displayed to the left.

4. Click on  (**Condition**) next to an info area and define a condition (see [Conditions](#) in the User Manual). Alternatively, click on  (**Load**) under **Condition: <Info Area>** to load a condition.
5. Enable the **optional** check box to link info areas using a logical OR (only one of the info areas for which the **optional** check box is enabled needs to meet the condition for the filter mask to apply).

Note: The **optional** check box applies to the condition and all other settings in this window.

6. You can define filter masks for the "Default configuration" that display different data in different variations of the level:

- Determine whether the condition **must be met** or **must not be met** under **Condition: <Info Area>**.
- Use the settings under Info Area: <Info Area> to determine whether the info area **must occur** in the level, **must not occur** in the level, or whether this is **not important**.

This allows you to determine that a filter mask is only applied if a level contains a certain info area. For example, the filter mask for missed activities is only displayed if the **Activity Overview** level includes the **Company** and **Person in Company** info areas. If the **Activity Overview** is accessed from the **Offer** level, the filter mask is not applied.

- Use the options under **Record: <Info Area>** to determine whether a record must be present (**must contain data**), must not be present (**must be empty**) or whether this is **not important**.



For example, this allows you to display a different mask in the **Company+Person** level if no person records exist for a company.

7. Click on **OK**.

8. Select the desired mask format.

9. Click on **OK**.

Your settings are displayed under **Filter Mask for Level**.

- Click on  (**Condition**) to edit the settings.
- Click on  in the **Mask Format** column to load a different mask.
- Enable or disable the check boxes in the **Default Mask**, **Integrated Mask** and **Summary Index Card** columns to determine which view the mask should be used in.

The lines are processed sequentially. The first condition that a record fulfills is applied. Edit the order by dragging entries with the mouse.

10. Click on **OK**.

11. Save the desktop format.

Summary Index Cards Tab

Learn how to configure a level's summary index cards.

Use the **Summary Index Cards** tab to configure a level's summary index cards:

- **For Summary Index Cards:** Select the mask to be used if this level is displayed in the summary index card.

Enable the **Mandatory mask** check box to determine that the user cannot load another mask.

Enable the **Overwrite predecessor levels** check box to only display the summary index card for the current level's immediate parent, if the current level has several parents.

Example: Company - Offer - Offer Item

If the **Overwrite predecessor levels** check box is enabled for the **Offer** level, the company is not displayed in the summary index card of the **Offer Item** level.

- **Summary Index Cards:** Select the summary index card for the current level. Enable the **Mandatory mask** check box to determine that users cannot load another mask.

Note: The **Summary Index Card** settings are only available if the current level has a parent.

Conditional Formatting Tab

Use the **Conditional Formatting** tab to determine that fields should be displayed in different colors depending on their content.

The following options are available:



- **Do no use conditional formatting:** No conditional formatting is applied.
- **Use conditional formatting from info area:** The conditional formatting defined for an info area in the level is applied, see [Conditional Formatting Tab](#) on page 296.
- **Use conditional formatting for level:** The conditional formatting defined for the level is applied.

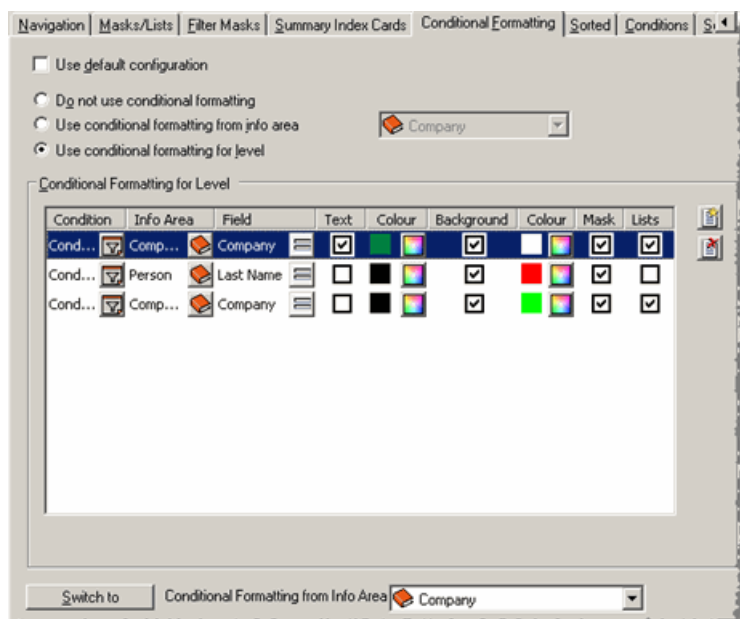
To use conditional formatting from the info area settings:

1. Enable **Use conditional formatting from info area**.
2. Select the info area whose settings you wish to use from the drop-down list. (Alternatively, select an info area from the **Conditional Formatting from Info Area** drop-down list and click on **Switch to** to display and edit the settings for the info area.)
3. Click on **OK**.
4. Save the desktop format.

Note: If the desktop is an extended desktop, enable the **Inherit configuration** option to inherit the conditional formatting from the parent desktop as opposed to from the info area settings, see [Extended Desktops](#) on page 299.

To define conditional formatting for the level:

1. Enable **Use conditional formatting for level**.
 2. Click  (**New**) next to the **Conditional Formatting for Level** list.
The **Define Conditions** window opens.
 3. Click on  (**Condition**).
 4. Define the condition(s).
 5. Click on **OK**.
- A new line is displayed under **Conditional Formatting for Level**.



- **Condition:** Use this column to edit or display the condition.
- **Info Area:** Select the info area that the conditional formatting applies to. If you do not specify an info area, the formatting is applied to the entire mask or row in lists.
- **Field:** Select the field that the conditional formatting applies to. If you do not specify a field, the formatting is applied to all fields in the info area. To apply formatting to more than one specific field in an info area, define additional lines for these fields.
- **Text:** Enable the check box in the **Text** column to display the text in the selected color.
- **Background:** Enable the check box in the **Background** column to display the background in the selected color.
- **Color:** Click (**Color**) to select the font or background color.
- **Mask/Lists:** Enable the corresponding check boxes in the **Mask** or **Lists** column to determine whether conditional formatting should be applied in mask or list view.

Note: Performance may suffer when outputting a large volume of data in lists using conditional formatting. The currently active row uses the defined text colors; the background color is only used if the **Background** option is enabled in the **List Bar Properties**, see [Configuring the Appearance of the Selected Record](#) on page 199.

The lines are processed sequentially. The first condition that a field fulfills is applied. Edit the order by dragging entries with the mouse.

6. Click on **OK**.
7. Save the desktop format.

Sorting Tab

Learn how records are sorted in a level.

Use the **Sorting** tab to determine how records are sorted in a level:

Predefined Sort

To use a predefined sort index:

1. Select the info area to sort by in the top **Sort Order** pane.
2. Select the field to sort records by lower **Sort Order** pane.
3. Determine whether records should be sorted in **Descending** or **Ascending** order.

Note: Predefined sort indices are only available for independent levels (e.g. **Company+Person**).

Custom Sort

To define a customer sort order:

1. Click the **Sort** button under **Fields**.
2. Select the fields that records should be sorted by (up to 5 fields per info area).
3. Enable the **Always open level with this sort order** check box to activate the settings.

Note: If you want loaded selections to remain active, disable this option for the **Company+Person** and **Property** (BTB only) levels.

Enable the **Always open level with these sort fields** check box to only load the sort fields when the level is opened. If you do not enable this option and users change the sort order, the user settings are applied.

Allowing Users to Sort

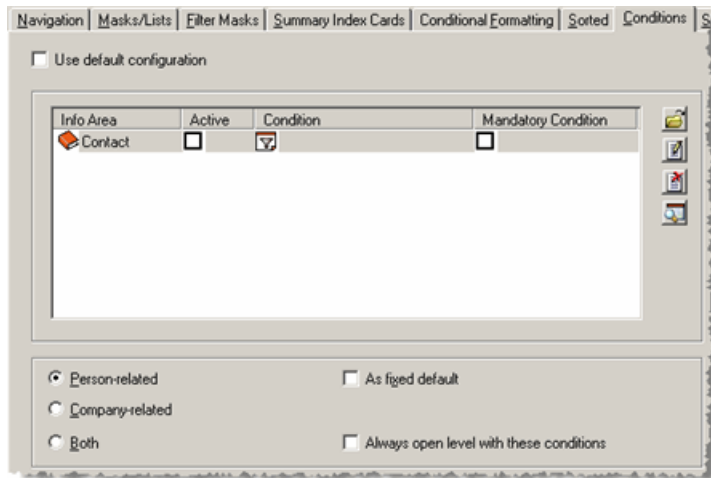
You can determine (for each level) whether users can sort records using the menu (**Data > Sort**) or by clicking in the list header:



- **Allow sorting:** Disable this check box to prevent users from sorting in general. If this option is enabled, users can search using the menu (as well as sort lists by clicking on the column header if **Click on header to sort** is enabled).
- **Click on header to sort:** Enable this check box to determine that users can sort records by clicking on the list header. If this option is disabled, users can only search using the menu. If the check box and tick are grayed out, the settings defined under **Lists** in the **Masks** tab of the interface settings are applied, see [Masks Tab](#) on page 234.




Conditions Tab

Learn how to define conditions that determine which records are displayed in a level.

Use the **Conditions** tab to define conditions that determine which records are displayed in a level:



1. Double-click on  (**Condition**) to define a condition (see [Conditions](#) in the User Manual), or click on  (**Load**) to load an existing condition.

Click on  (**Edit**) to edit the selected condition. Click on  (**Delete**) to delete the selected condition. Click on  (**View**) to display the condition.

2. You can apply the condition to the info area as follows:
 - No additional settings: The condition is inactive. Users can activate the condition by selecting **Data > Activate Conditions > <Info Area>** and edit the condition by selecting **Data > Define Conditions > <Info Area>**.
 - The **Active** check box is enabled: The condition is active. Users can deactivate the condition by selecting **Data > Activate Conditions > <Info Area>** and edit the condition by selecting **Data > Define Conditions > <Info Area>**.
 - The **Mandatory Condition** check box is enabled: The condition is active and cannot be deactivated or edited by users.

Note: These conditions affect the display of records in a specific level. Use the **Rights** module to define conditions affecting the display of records in info areas, see [Conditional Access to Info Areas](#) in the *CRM.core Administrator Guide*.

3. The lower section of the mask contains settings applicable to child levels of the **Company+Person** level:
 - **Person-related/Company-related/Both:** Determine which option is enabled by default when the level is opened. Users can change this setting in the **Data** menu.

This setting is only applied if you also enable the **Always open level with these conditions** option.


- **As fixed default** The level is opened with the selected setting (**Person-related/Company-related/Both**). Users cannot change this setting in the **Data** menu.
- **Always open level with these conditions:** If this option is enabled, the level is always opened with the selected setting (conditions and **Person-related/Company-related/Both**). If the option is disabled, the settings are loaded when the user opens the level for the first time. Once the user changes the settings, the user settings are applied the next time the level is opened.

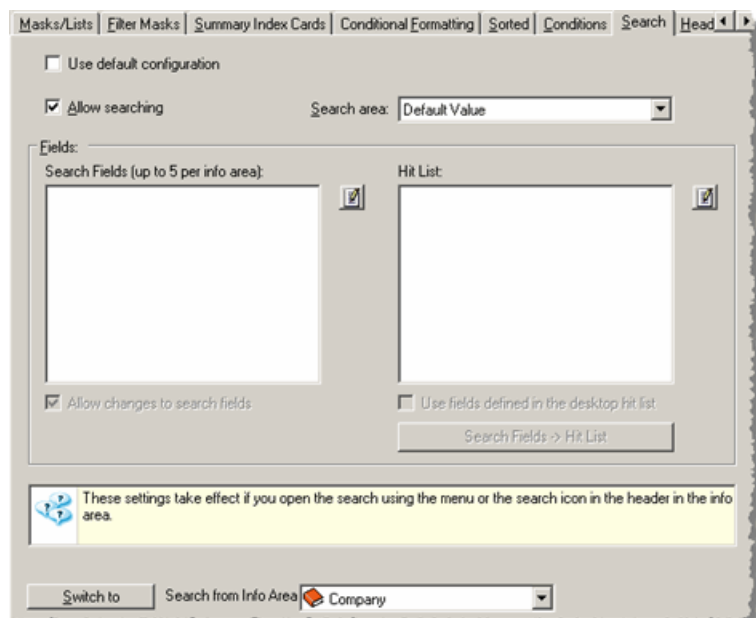
4. Click on **OK**.

5. Save the desktop format.


Search Tab

Use the **Search** tab to configure the search for a level.


For further details, see [Searching](#) in the User Manual. Users can load these settings using the  (**Predefined search fields**) button in the search mask.



To configure the search for a level:

1. Enable the **Allow searching** check box. If this option is disabled, users cannot access the **Data > Search** menu entry or the  (**Search**) button in the level header.
2. Determine the **Search area**:
 - **Default Value**: The default search area defined for the search mask is used.
 - **Current context**: The search is executed in the context of the current parent record. For example, the search is only applied to activities linked to the current person.
 - **Entire database**: The search is executed across the entire database.

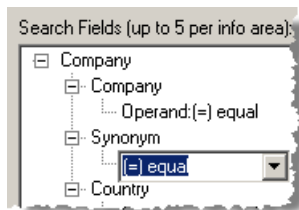
Changes made to the search area by users are **not** saved in the `pro1.cfg` file, i.e. the level settings are reloaded each time Aurea CRM win is started.


3. Click on  (**Edit**) to the right of the **Search Fields** list.
4. Select up to 5 fields in the **Field Selection** window or load an existing format. These fields are entered in the search mask by default.

The number to the left of the selected field shows the order in which the fields have been selected and are displayed in the search mask.

5. Click on **OK**.

The selected fields are listed under **Search Fields**.




6. Double-click on an operator to change it.
7. Enable the **Allow changes to search fields** check box to allow users to choose other fields in the search.
8. Define the **Hit List**:
 - Click on **Search Fields -> Hit List** to transfer the search fields to the hit list. Any existing fields in the hit list are removed in the process.
 - Click on  (**Edit**) to the right of the **Hit List** and select the fields that should be added to the hit list, or load an existing format. Click on **OK**.

The hit list is loaded when the user first opens the search. If the user changes the hit list, the user settings are loaded in the search from then on.

9. Enable the **Use fields defined in the desktop hit list** check box to load this hit list each time the search is started. In this case, user-specific hit lists are not saved.
10. Click on **OK**.
11. Save the desktop format.

Search settings can also be defined per info area, see [Search Tab](#) on page 295. Select an info area from the **Search from Info Area** drop-down list and click on **Switch to** to open the **Search** tab of the info area's properties.

Note: If no level-specific configuration is defined for the search, the info area specific configuration is used.

If you have defined both level-specific and info area-specific search settings, the level settings are used (in addition to any search criteria defined for the info area). If the search is accessed from a link field using , the info area settings are applied.

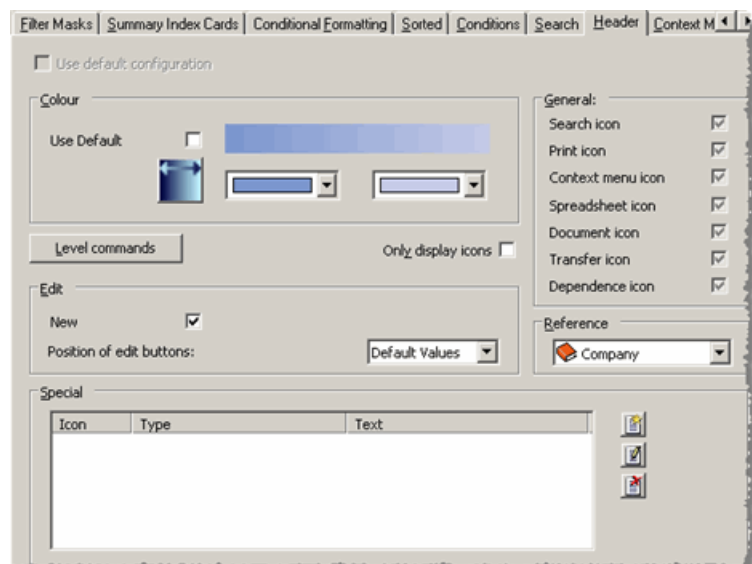
Special search masks (**Select Person**, **Search Activity**) are defined in the user interface settings, see [Dialog Boxes Tab](#) on page 240. You can edit the special search masks used by the **Company**, **Person in Company** and **Property** (BTB only) info areas in the Mask Generator, see [Mask Generator](#) on page 169.

Use the **Links** tab define which data in source levels should be used as search criteria when searching for records to link to, see [Using Field Contents as Search Criteria](#). These settings take precedence over the search fields defined for the info area in the info area settings.

Header Tab


Learn how to configure the appearance of the level header and its entries.

Use the **Header** tab to configure the appearance of the level header and its entries:



Color


Enable the **Use default** check box to use the global interface settings, see [Colors Tab](#) on page 224.

Disable the check box to edit the color and gradient of the level's header. Click on  to switch between a horizontal and a vertical gradient.

General

Use the check boxes to determine which buttons should be displayed in the header. If the check boxes are gray, the user interface settings apply, see [Context Menu/Header Tab](#) on page 230.

Level Commands

To display or remove level-specific buttons (e.g. the  (**Person**) button in the **Company+Person** level) in the level header:






1. Click the **Level Commands** button.
A window is opened listing all the level-specific buttons.
2. Use the check boxes next to the buttons to determine which buttons should be displayed.
3. Click on **OK**.

Note: The **Level Commands** button is not available in custom levels and the "Default Configuration".

Only display icons

Enable this check box to display only the level icon in the header without any text. This setting takes precedence the **Level icon**, **Show reference** and **Header Info** options in the user interface settings, see [Context Menu/Header Tab](#) on page 230.

Edit

- **New:** Determines whether the  (**New**) button is displayed in the header.
- **Position of edit buttons:** Use this setting to determine where the  (**Edit**),  (**Save**),  (**Delete**) and  (**Cancel**) buttons are displayed.
 - **Default Values:** The global user interface settings are applied, see [Context Menu/Header Tab](#) on page 230.
 - **Header:** The edit buttons are only displayed in the header.
 - **Context Menu:** All edit buttons are only displayed as entries in the context menu.

Reference

If you are displaying the reference in the header, select the info area whose reference should be displayed in a level containing multiple info areas, see [Reference Tab](#) on page 292.

Special

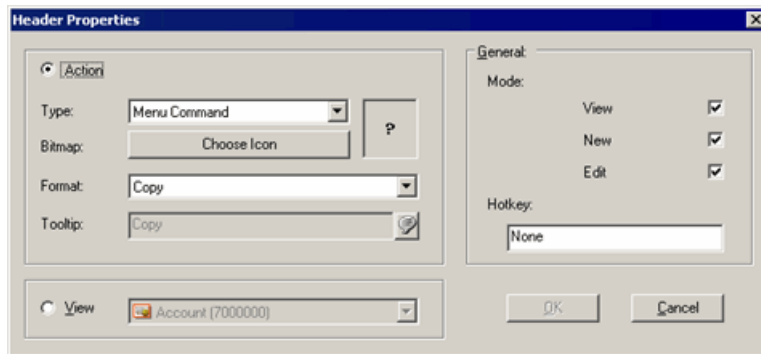
Define any additional buttons that initiate certain actions (menu commands, workflows, triggers etc., see [Defining Actions Buttons](#) on page 266) or access other levels (see [Accessing Levels with Buttons](#)).

Defining Actions Buttons

Learn how to define action buttons used to access header items.

To display text or define buttons used to access menu commands, workflows, dashboards, triggers, single letters in the header:


1. Click on  (**New**) under **Special** in the **Header** tab.



2. Select the desired **Type**.
3. Click on **Choose Icon** to choose a predefined icon or load your own bitmap.
4. Select the desired menu command or format in the **Format** field.

Note: If you are defining a button for the "Default Configuration", ensure that you only select actions that require info areas that are present in all variations of the level.

5. The **Tooltip** field contains the same text as the **Format** field. Edit the text to display a different tooltip.
If you selected "Text" in the **Type** field, enter the text to display in the header.
6. Determine which modes the button is active in (**View**, **New** and **Edit**).
7. Enter a letter in the **Hotkey** field. This defines the keyboard shortcut Ctrl+Letter for the button.
8. Click on **OK**.

The defined buttons are displayed under **Special** and can be edited and deleted using the  (**Edit**) and  (**Delete**) buttons.

Accessing Levels with Buttons

To define buttons used to access other levels:

1. Click on  (**New**) under **Special** in the **Header** tab.

The **Header Properties** window opens.

2. Enable the **View** option.
3. Select the desired level from the drop-down list. All levels linked to the current level are listed.

If the desired level is unavailable:

- Define a new dependent level, see [Defining New Levels](#) on page 301.
- Define a link to the desired target level, see [Links Tab](#) on page 273.

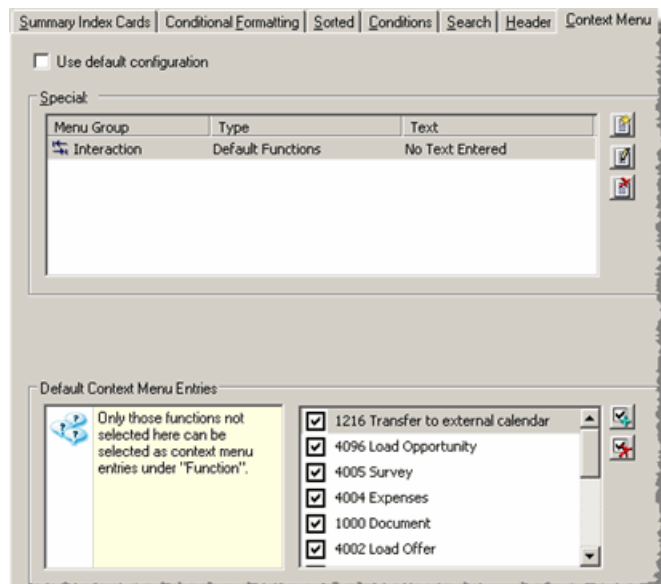
4. Determine which modes the button is active in (**View**, **New** and **Edit**).
5. Enter a letter in the **Hotkey** field. This defines the keyboard shortcut Ctrl+Letter for the button.
6. Click on **OK**.

The defined buttons are displayed under **Special** and can be edited and deleted using the  (**Edit**) and  (**Delete**) buttons.

Note: Buttons are not displayed if they access levels to which access is denied or info levels which have been deleted in the data model.

Context Menu Tab

Use the **Context Menu** tab to configure a level's context menu.



You can:

- Add entries used to access menu commands, workflows, triggers etc., see [Adding Actions to the Context Menu](#) on page 269.
- Add entries used to access other levels, see [Accessing Levels with the Context Menu](#) on page 270.
- Add the links defined on the **Links** tab, see [Adding Links to the Context Menu](#) on page 271.
- Add entries used to display the history or tree view, see [Accessing the History from the Context Menu](#) on page 271 and [Accessing the Tree View from the Context Menu](#) on page 272.
- Add separators and text entries to structure the menu, see [Structuring the Context Menu](#) on page 272.

Default Context Menu Entries

Certain functions are defined as entries in the context menu in specific levels (e.g. **Transfer to external calendar** in the **Activity** level).

1. Disable the corresponding check boxes under **Default Context Menu Entries** to remove entries from the context menu.

Click on  (**Select all**) or  (**Clear selection**) to select or disable all entries.

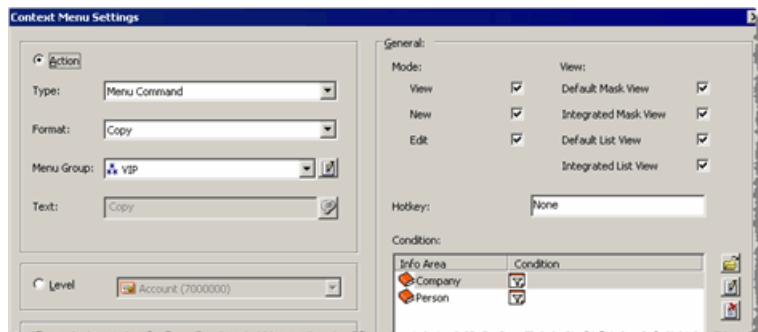
Note: These settings are unavailable in the "Default Configuration".

Adding Actions to the Context Menu

Learn how to add actions to context menu.

To add actions to the context menu:

1. Click on  (**New**) under **Special** on the **Context Menu** tab.



2. Select the desired **Type**.

Select "Function" from the **Type** drop-down list to add functions not assigned to the level by default. For example, you can add the **Add to Favorites** entry to the context menu in levels containing records whose key is composed of the station number and serial number.

Select "Separator" or "Text" to add entries used to structure the menu, see [Structuring the Context Menu](#) on page 272.

3. Select the desired menu command or load the desired format in the **Format** field.

Note: If you are defining the context menu for the "Default Configuration", ensure that you only select actions that require info areas that are present in all variations of the level. You need to use global formats for actions of the **Type** "Single Letter" and "Search Condition", see [Global Formats](#) in the *User Manual*. If you wish to access conditions in a level that contains multiple info areas, you also need to select the target info area.

4. Assign the option to a **Menu Group**, see [Structuring the Context Menu](#) on page 272.

Entries in the same menu group are grouped together in the context menu. The group's icon is displayed next to the first entry in a menu group, see [Context Menu](#) in the *User Manual*.

5. The **Text** field contains the same text as the **Format** field. Edit the text to rename the menu option.
6. Determine which modes the option is active in (**View**, **New** and **Edit**).
7. Use the options under **View** to determine which views the context menu entry is available in (mask/list/default/integrated).

8. Enter a letter in the **Hotkey** field. Ctrl+Alt+Letter can then be used to access the context menu option.
9. Define a **Condition** for one or more info areas in the level, to determine under what conditions the menu option should be active, see [Conditions](#) in the *User Manual*.

Note: Options such as **Document** or **Survey** are only available if a document or questionnaire is entered in the record. Conditions have no effect on these options.

10. Click on **OK**.

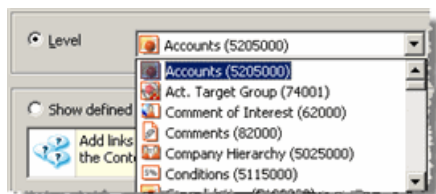
The defined context menu options are displayed under **Special** and can be edited and deleted using the  (**Edit**) and  (**Delete**) buttons.

Accessing Levels with the Context Menu

Learn how to define a context menu entry.

To define a context menu entry used to access other levels:

1. Click on  (**New**) under **Special** on the **Context Menu** tab.
2. Enable the **View** option.



3. Select the desired level from the drop-down list. All levels linked to the current level are listed.

If the desired level is unavailable:

- Define a new dependent level, see [Defining New Levels](#) on page 301.
- Define a link to the desired target level, see [Links Tab](#) on page 273.

4. Define your settings, as described under [Adding Actions to the Context Menu](#) on page 269.
5. Click on **OK**.


The defined context menu options are displayed under **Special** and can be edited and deleted using the  (**Edit**) and  (**Delete**) buttons.

Note: Context menu options are not displayed if they access levels to which access is denied or info areas which have been deleted in the data model.

Adding Links to the Context Menu

Learn how to add the links defined on the **Links** tab to the context menu, enable the links on the **Context Menu** tab.

Follow the below steps:

1. Click on  (**New**) under **Special** on the **Context Menu** tab.
2. Select **Show defined links**.
3. Determine the **Mode**, **View** and **Condition** under which the link is displayed in the context menu, see [Adding Actions to the Context Menu](#) on page 269.
4. Click on **OK**.

A "Hyperlink" entry is added to the **Special** list. Click on  (**Edit**) or  (**Delete**) to edit or delete the entry.

Accessing the History from the Context Menu

Learn how to access the history in the Aurea CRM win main module, you need to add a context menu entry for each level and info area.

Follow the below steps:

1. Click on  (**New**) under **Special** on the **Context Menu** tab.
2. Select **History**.



3. Select the desired **Info Area**.
4. Enter a name for the entry in the **Text** field (e.g. "Company History").
5. Define your settings, as described under [Adding Actions to the Context Menu](#) on page 269.
6. Click on **OK**.

A "History" entry is added to the **Special** list. Click on  (**Edit**) or  (**Delete**) to edit or delete the entry.

Note: You can also configure access to the history from the fixed or level-dependent section of the icon bar, see [Fixed Icon bar](#). The current record's history is opened when users select the entry. The history needs to be activated for each info area in the [Rights module](#), see [Enabling the History](#) in the **CRM.core Administrator Guide**.

Accessing the Tree View from the Context Menu

Learn how to access the tree view in the Aurea CRM win main module, you need to add a context menu entry for each level and info area.

Follow the below steps:

1. Click on  (**New**) under **Special** on the **Context Menu** tab.
2. Select **Tree View**.



3. Select the desired **Info Area**.
4. Enter a name for the option in the **Text** field.
5. Define your settings, as described under [Adding Actions to the Context Menu](#) on page 269.
6. Click on **OK**.

A "Tree View" entry is added to the **Special** list. Click on  (**Edit**) or  (**Delete**) to edit or delete the entry.


Note: You can also configure access to the tree view from the fixed or level-dependent section of the icon bar, see [Fixed Icon bar](#). The current record is displayed in the tree view when a user selects the entry.

You can configure the tree view for each info area, see [Tree View Tab](#) on page 297.

Structuring the Context Menu

Learn how to make entry to context menu and reorder/manage the existing entries.

Adding Text Entries and Separators

1. Click on  (**New**) under **Special** on the **Context Menu** tab.
2. Select either "Text" or "Separator" from the **Type** drop-down list.
3. Select the desired **Menu Group**.
4. If you selected "Text", enter the entry's **Text**.
5. Click on **OK**.




Reordering Entries

To reposition an element within a menu group:

1. Click on an entry in the **Special** list and drag it to the desired position.

Repositioning Menu Groups

To change the order menu groups in the context menu:





1. Click on  (**New**) or  (**Edit**) next to the **Special** list.
2. Click on  (**Edit**) next to the **Menu Group** field under **Action**.
3. Drag the menu groups to the desired positions.
4. Click on **OK**.

Note: These settings are applied globally, not just to the context menu in a specific level.

Changing Icons

An icon is assigned to each menu group. The icon is displayed next to the first entry in the group. (No icons are displayed if the context menu is only displayed as a popup menu, see [Context Menu/Header Tab](#) on page 230.)

To assign a different icon to a menu group:

1. Click on  (**New**) or  (**Edit**) next to the **Special** list.
2. Click on  (**Edit**) next to the **Menu Group** field under **Action**.
3. Double-click on the desired entry.
4. Choose a predefined icon from the list of **Available Icons** or click on  to load a bitmap.
5. Click **OK** to exit the **Choose Icon** and **Edit Menu Group** windows.

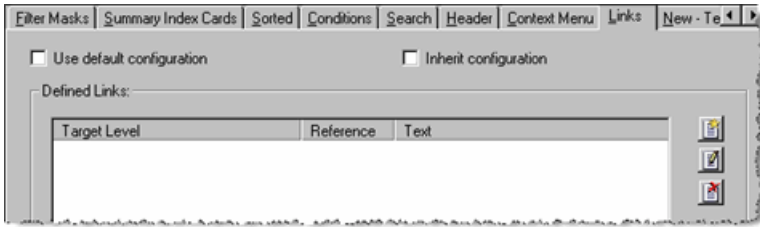
Note: These settings are applied globally, not just to the context menu in a specific level.

Links Tab

Use the **Links** tab to define links between levels for which no direct link exists in the data model.

One of the info areas in the source level must however contain a custom link or a link to an info area in the target level, see [Link](#) in the **CRM.core Administrator Guide**.

Links must be defined to link records and display linked records.



You can:

- Define links between levels, see [Defining Links](#).
- Define the target info area of custom links, see [Defining Target Info Areas](#).
- Define default search criteria for link fields, see [Using Field Contents as Search Criteria](#).

Add a context menu entry with the option **Show defined links** enabled to display the links defined here in the context menu as well, see [Adding Links to the Context Menu](#) on page 271.

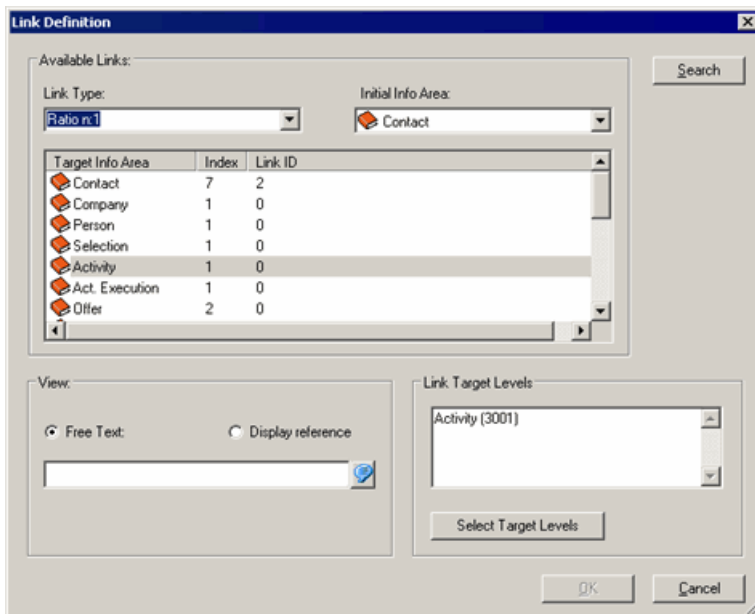
When a user clicks on a link (or selects the context menu option), the linked record is opened in the target level.

Defining Links

To define a link (e.g. from the activity mask in the calendar to the **Marketing Activity** level):

1. Click on  (**New**) under **Defined Links**.

The **Link Definition** window is displayed.



2. Select the type of link in the **Link type** field (1:1, 1:n or n:1).
3. Select one of the info areas in the source level under **Source** info area (in this case, the **Activity** info area in the **Calendar** level).

All info areas linked to the source info area in the data model using the selected link type are listed in the **Target Info Area** column. If the desired info area is not listed, you need to add a link to the data model, see [Link](#) in the *CRM.core Administrator Guide*.

The index is displayed in the **Index** column, see [Index](#) in the *CRM.core Administrator Guide*.


The ID of the corresponding link in the data model is displayed in the **Link ID** column, see [Link IDs](#) in the *CRM.core Administrator Guide*.

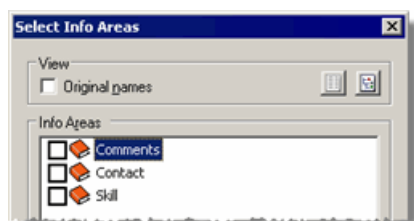
Defining Target Info Areas

You can define the possible target info areas for custom links in levels. If you do not specify any info areas, all info areas whose key is composed of the record and station number are available. (Exception: Available target info areas for links in the **Task** level are predefined. However, you can add further info areas.)

To define the target info areas:

1. Define a link to the desired target levels, see [Defining Links](#).

If a user clicks on  (**Find**) in the source level (e.g. **Ticket**), only the defined target info areas can be selected:



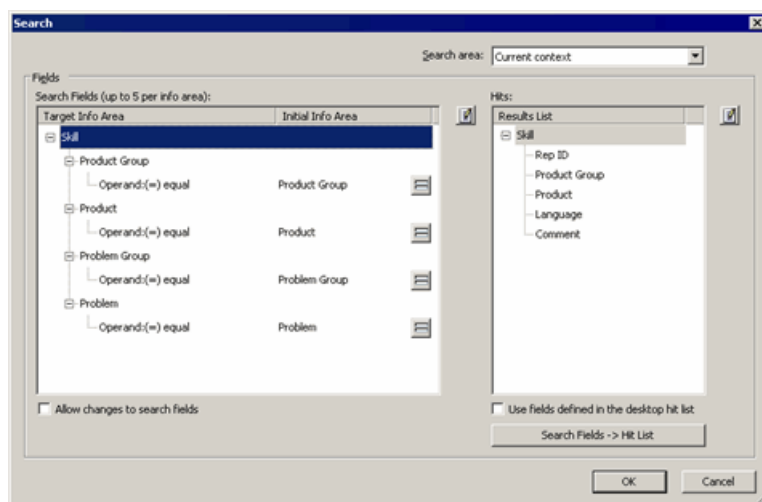
2. Define search default values for these links, if desired, see [Using Field Contents as Search Criteria](#).

Using Field Contents as Search Criteria

You can use the contents of fields in the source info area as search criteria when linking a record via a link field. These settings take precedence over the info area settings, see [Search Tab](#) on page 295.

To use field contents in the source info area as search criteria in the target info area:

1. Define a link, see [Defining Links](#).
2. Click on **Search** to define the search fields and values.



3. Determine the **Search area**:

- **Default Value:** The default search area defined for the search mask is used.
- **Current context:** The search is executed in the context of the current parent record.
- **Entire database:** The search is executed across the entire database.

4. Click on (**Edit**) to the right of the **Search Fields** list.

5. Select up to 5 fields that should be transferred the search mask by default.

6. Click on **OK**.

The selected fields are listed in the **Target Info Area** column in the **Search Fields** list.

The default operator is displayed for each field.

7. Double-click on an operator to change it.


8. Click on (**Select Field**) in the **Initial Info Area** column.

The **Field Selection** window opens.

9. Select a corresponding field in the target info area for each of the fields selected in the source info area. The content of the field in the source info area is used as the default comparison value.

10. Enable the **Allow changes to search fields** check box to allow users to choose other fields in the search.


11. Define the **Results List**:

- Click on **Search Fields > Hit List** to transfer the search fields to the hit list. Any existing fields in the hit list are removed in the process.
- Click on  (**Edit**) to the right of the **Hits** list and select the fields to be displayed in the results list from the available info areas. Alternatively, load an existing format. Confirm your settings with **OK**.

The hit list is loaded when the user first opens the search. If the user changes the hit list, the user settings are loaded in the search from then on.


12. Enable the **Use fields defined in the desktop hit list** check box to load this hit list each time the search is started. In this case, user-specific hit lists are not saved.

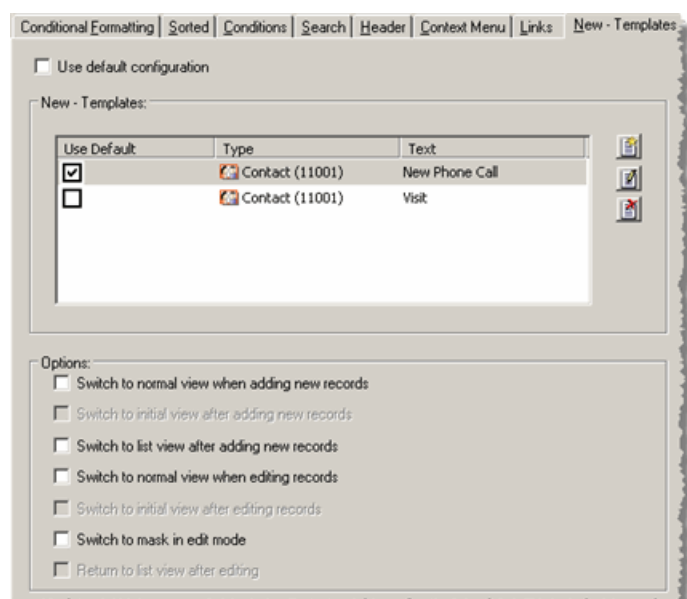
13. Click on **OK**.

These default values are transferred to the search mask when a user clicks on the  (**Search**) button.

New - Templates Tab

Use the **New - Templates** tab to define templates used when new records are added in a level.

The templates are available from a drop-down list next to the  (**New**) button in the header.



For example, you can define templates that use different masks and default values for various activity types (e-mails, telephone calls, visits etc.).

You can also use new template buttons to initiate triggers and workflows.

Defining level-specific template buttons is done in the same way as defining buttons for the general toolbar, see [New - Template](#) on page 242.

Enable the check box in the **Use Default** column to determine which template should be used when a user clicks directly on the **New** button in the header.

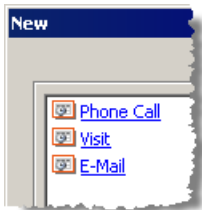
Enable the **New** check box on the **Header** tab to display the **New** button in the header, see [Header Tab](#) on page 264.

You can configure further display **Options** that affect how records are added and edited:

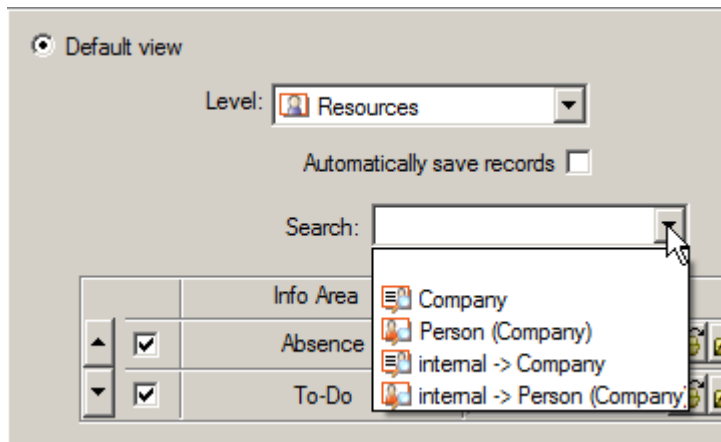
- **Switch to normal view when adding new records:** Determine whether the view automatically switches from integrated view to normal view when adding records.
- **Switch to initial view after adding new records:** Determines whether the view is returned to integrated view once the record has been saved.
- **Switch to list view after adding new records:** Determines whether the view is returned to list view once the record has been saved.
- **Switch to normal view when editing records:** Determine whether the view automatically switches from integrated view to normal view when editing records.
- **Switch to initial view after editing records:** Determines whether the view is returned to integrated view once the record has been saved.
- **Switch to mask in edit mode:** Determines whether the view is switched from list to mask view when editing records.
- **Return to list view after editing:** Determines whether the view is returned to list view once the record has been saved.

Special Case: New Templates in the Calendar

If you define new templates for the **Calendar, Resources or Overlapping Appointments** levels, double-clicking in the mask opens a window with all the available templates (also available from the drop-down list next to the **New** button in the header).



Use the **Search** drop-down list to determine the context of the new appointment.

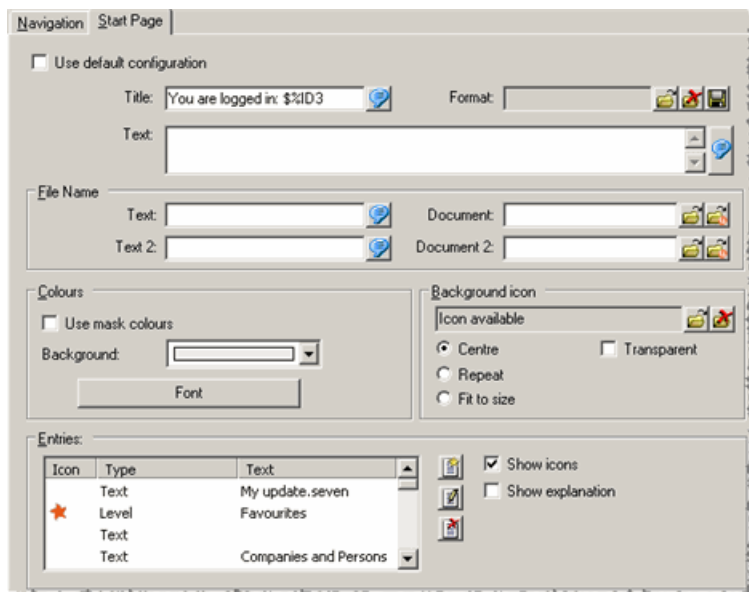


The following options are available:

- **Company:** The company search is opened when the template is accessed. The user can then search for the company that the activity should be added for.
- **Person in Company:** The person search is opened when the template is accessed. The user can then search for the person that the activity should be added for.
- **internal -> Company:** An activity is added to the company entered in the **FI_StaNo** and **FI_SerNo** fields of the current rep when the template is accessed. This allows a rep to add internal records for his company. If these fields are empty in the rep record, the company search is opened instead.
- **intern -> Person in Company:** An activity is added to the person entered in the **FI_StaNo**, **FI_SerNo**, **PE_StaNo** and **PE_SerNo** fields of the current rep when the template is accessed. This allows a rep to add internal records for himself. If the **KP_StaNo** and **KP_SerNo** fields are empty, the person search is opened instead.

Start Page Tab

Use the **Start Page** tab to configure the Aurea CRM win start page. You can add links to independent levels, workflows, dashboards, analyses, reports, search areas, documents and web pages to the start page.








Depending on your vertical version, several start page levels are available. You can also define additional levels as start pages, see [Defining New Levels](#) on page 301. Integrate the start level in the icon bar or configure it as a start page, see [Fixed Icon bar](#) and [Start Levels](#).

To define a start page:

1. Double-click on the desired start level in the **Define Desktop** window.
2. Switch to the **Start Page** tab.
3. Enter the **Title**.

You can include data from the current rep's record. Use "\$%IDx" to include a field ("x" = field number).

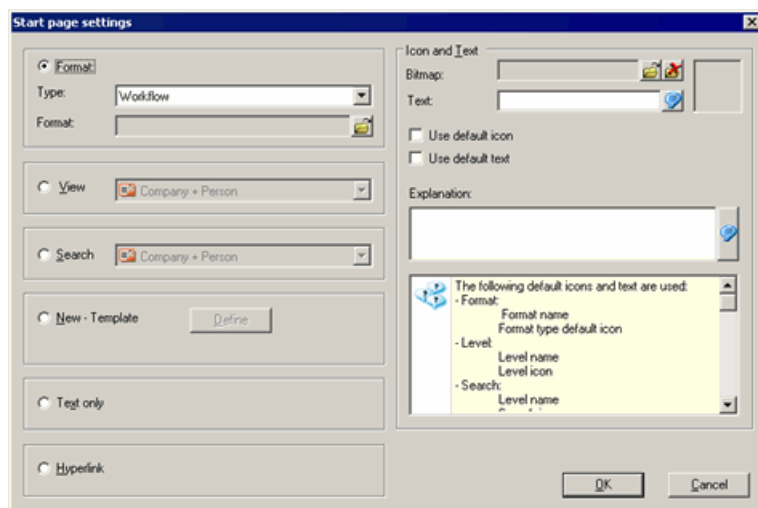
Example: "You are logged in as \$%ID3." > "You are logged in as John Smith."

4. Enter a **Text** to be displayed on the start page. You can also include rep data in the **Text**.
5. Determine whether any documents can be accessed from the start page (**Document** and **Document 2** fields).
 - **Text/Text 2:** Enter a description for the document here
 - **Document/Document 2:** Click on  (**Load**) to load a document or click on  (**Select Document**) to select a document from the Aurea CRM win database. The first document is displayed as a hyperlink above the main area; the second document is displayed below.
6. Configure the **Background** color and **Font** on the start page under **Colors**. Enable the **Use mask colors** check box to apply the interface settings.
7. Select a background for the start page under **Wallpaper**:
 - a. Click on  (**Load**).
 - b. Choose a predefined icon from the list of **Available Icons** or click on  (**Load**) to load a bitmap.
 - c. Click on **OK**.
 - d. Determine how the image should be displayed:
 - **Center:** The image is centered on the start page.
 - **Repeat:** The image is tiled.
 - **Fit to size:** The image is resized to fill the entire start page.
 - **Transparent:** Enable this option to display the image with a transparent background.
8. Configure the links displayed on the start page under **Entries**, >> [Defining Entries](#).
 - **Show icons:** Determines whether the corresponding icons are displayed next to links.
 - **Show explanation:** Determines whether a descriptive text is displayed next to links.
9. Click on  (**Save**) next to the **Format** field to save the start page as a separate format, see [Saving, Loading and Deleting Formats](#) in the *User Manual*.
10. Click on **OK**.
11. Save the desktop format.

Defining Entries

To add an entry to the main area of the start page:

1. Click on  (**New**) under **Entries** on the **Start Page** tab.



2. Select the type of entry:


- **Format:** Select **Format** and choose the desired **Type** to add a link to a workflow, dashboard, analysis or XML report to the start page.

Click on  (**Load**) to select the desired format.

- **View:** Enable the **View** option and select the level to add a link to the level to the start page. All independent levels are available.

Note: If you add an entry for a level that is locked, the entry is not displayed on the start page.



- **Search:** Select **Search** and choose the desired level to add a link to the search mask to the start page.
- **New - Template:** Select **New - Template** and click on **Define** to create a new template, see [New - Template](#) on page 242.
- **Text only:** Select **Text only** and enter the **Text** under **Icon and Text** to add a text entry. This allows you to divide the start page into several sub-sections. If you select the **Text Only** option without entering any text, an empty line is added.
- **Hyperlink:** Select **Hyperlink** and enter a URL in the **Text** field under **Icon and Text** (e.g. www.aurea.com).

3. Click on  (**Load**) next to the **Bitmap** field under **Text and Icon** and select the icon to be displayed next to the link. If you select icons of different sizes, all icons are resized to the size of the first icon (maximum size: 24x24 pixels).

Enter a **Text** for the entry.

Enable the **Use default icon** or **Use default text** check boxes to use the default text or icon.

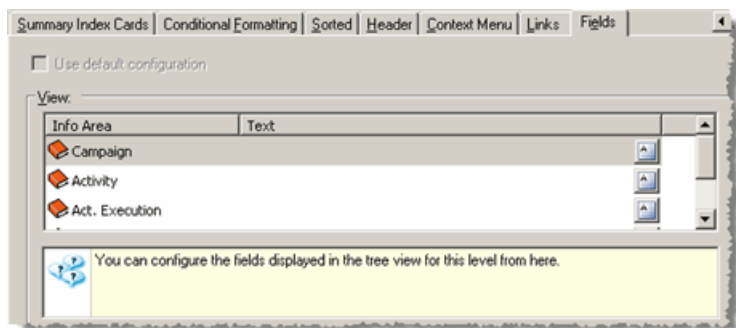
4. You can enter an **Explanation** of the entry.
5. Click on **OK**.

The entry is listed under **Entries** and can be edited and deleted using the  (**Edit**) and  (**Delete**) buttons.

Edit the order by dragging entries with the mouse.

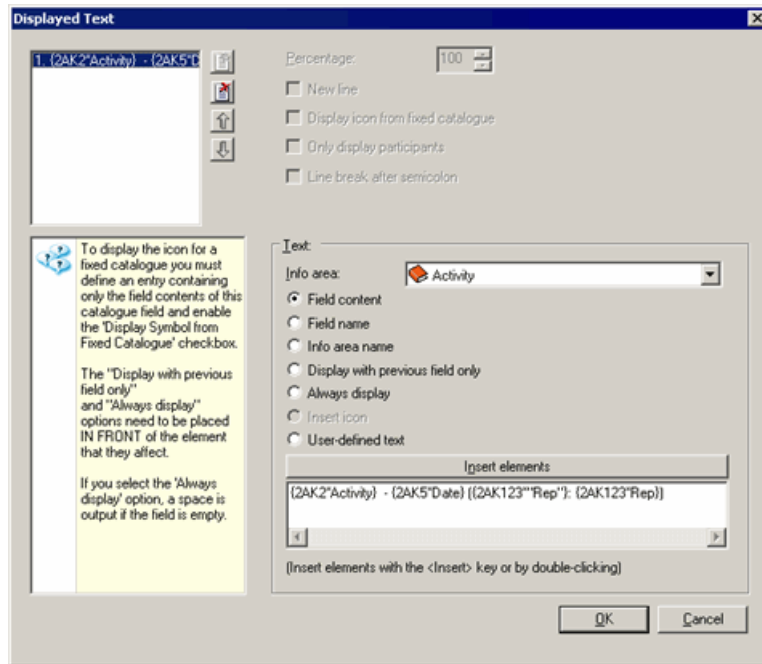
Fields Tab



Use the **Fields** tab to determine which information is displayed in the tree view in hierarchic levels (**Relationship Hierarchy, Installed Base** (BTB and OTC), **Campaign Planning, Ticket** and custom hierarchic levels).



To define the text displayed in the tree view:

1. Click on  (**Text**) next to the info area you wish to display data from.

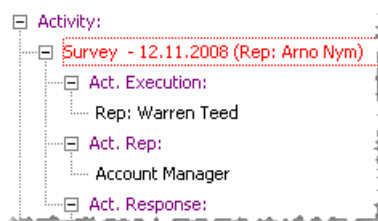


2. Click on  (**New**). Click on  (**Delete**) to delete existing entries.
3. Select an **Info Area** from the drop-down list to include data from the info area in the text.
4. Add elements as for references, see [Reference Tab](#) on page 292.

Note: You can include data from both the **Company**, **Person in Company** and **Relationship** info areas in the **Relationship hierarchy** level. Use the company and person fields in the **Company** and **Person in Company** info areas, not in the **Relationship** info area. Only use fields in the **Relationship** info area to display details of the relationship (e.g. the type of relationship).

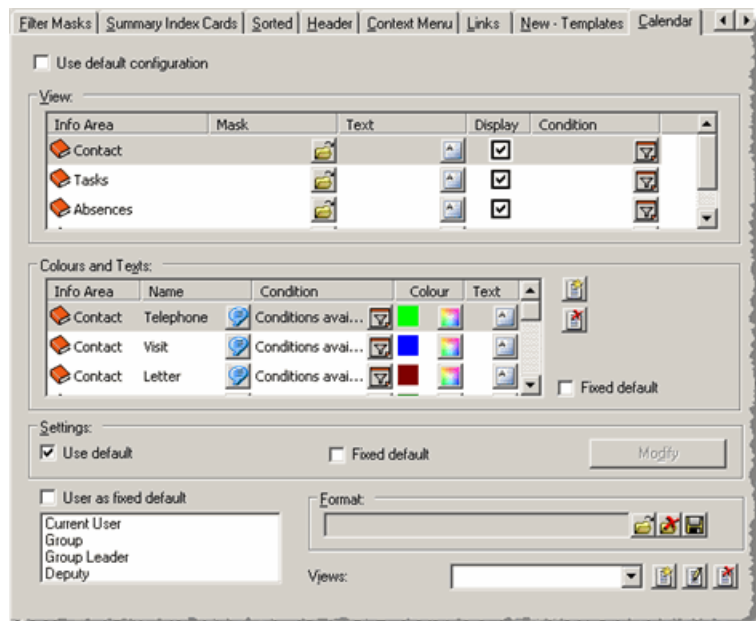
5. Click on **OK**.

The corresponding information is displayed in the tree view:



Calendar/Marketing Calendar Tabs



Use the **Calendar** and **Marketing Calendar** tabs to configure the calendar.



The **Calendar** tab is only available in the **Calendar**, **Resources** and **Overlapping Appointments** levels.

Note: The **Marketing Calendar** tab is available for the **Marketing Calendar** level. You can configure the marketing calendar in the same manner as the normal calendar, i.e. define colors, texts and masks for campaigns, activities and responses.

You can also define calendar settings in the interface settings, see [Calendar Tab](#) on page 227. If no specific settings have been defined for a level, the interface settings are used.

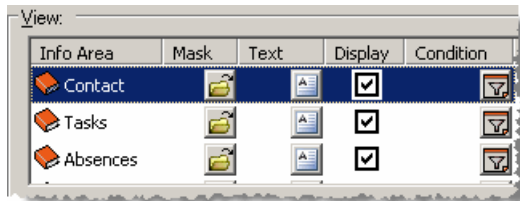
Users can change these settings using the  (**Filter view**) and  (**Settings**) buttons in the **Calendar**, see [Appointment Settings](#) and [Calendar Interface Settings](#) in the User Manual. The user settings are saved in the `pro1.cfg` file in the user directory. The user settings take precedence over the desktop settings.

Enable the **Fixed Default** and **User as Fixed Default** options to prevent users from being able to change the calendar settings, see [Colors and Texts](#) and [Settings](#).

Calendar settings can be saved as a separate format, see [Formats](#) in the User Manual.

View

Use the options under **View** to define masks, texts and conditions that determine how and which **Activity**, **Task**, **Absence** and **To-Do** records are displayed in the calendar:



- Click on (**Load**) in the **Mask** column to load a mask to be used by the appointment type. The mask is displayed at the bottom left when a user clicks on an appointment, see [Calendar](#) in the *User Manual*. If you do not choose a mask, the default mask is used.

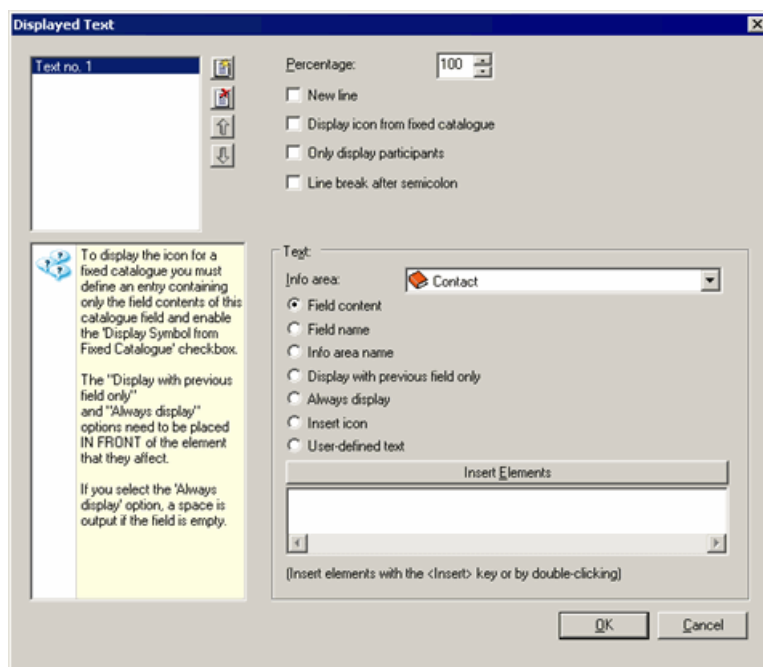
Note: If the mask contains links (e.g. the -> **Marketing Activity** field in the activity mask), you need to define a link to the corresponding target level for the link to function, see [Defining Links](#).


- Click (**Text**) in the **Text** column to define the text displayed in calendar entries, see [Defining the Text Displayed in Calendar Entries](#).
- Enable the **Display** check box to determine that appointments of the corresponding type are displayed in the calendar. For example, disable the **Display** check box for the **Activity** info area to determine that no activities should be displayed. User-defined appointment settings (**Status, Type, Priority**) are ignored in this case.
- Click on (**Condition**) to define a condition that determines which appointments should be displayed (e.g. only To-Do records whose **Status** is "Open"), see [Conditions](#) in the User Manual.

Defining the Text Displayed in Calendar Entries



To define the text displayed in a calendar entry:

1. Click on (**Text**) in the **Text** column of the desired **Info Area** under **View** on the **Calendar** tab.

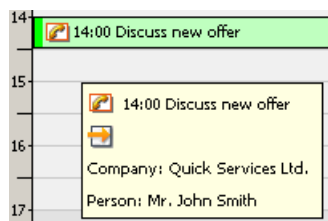


2. Click on  (**New**).
3. Select an **Info Area** from the drop-down list to include data from the info area in the text.
4. Add elements as for references, see [Reference Tab](#) on page 292.
5. Determine the following for each text:
 - **Percentage:** Enter the percentage of the width of the appointment the text should cover.
 - **New Line:** Enable this check box to determine that the text should begin on a new line.
 - **Display icon from fixed catalog:** Enable this check box to determine that the corresponding icon should be displayed instead of catalog values.

Note: To display the icon, you need to define a separate text including only the field.

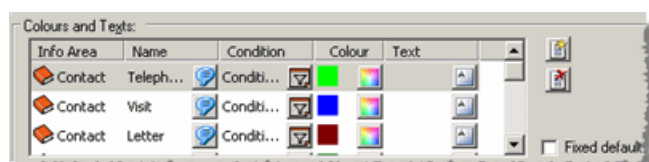
- **Only display participants:** Affects the **Participant ID** field. Enable this option to display the names of reps instead of the rep and group IDs.
 - **Line break after semicolon:** Enable this check box to add a line break after each semicolon.
- Click on  (**Delete**) to delete the selected entry.
 - Use the arrow buttons to change the order of entries.
6. Click on  (**New**) to add further entries.
 7. Click on **OK**.


The appointments are displayed in the calendar with the defined settings; in this case an activity in the **Calendar**:



Colors and Texts

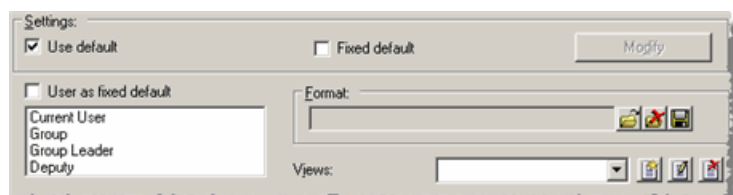
Use the settings under **Colors and Texts** to configure the color and texts displayed for individual appointment and activity types. For example, you could display "Completed" activities in a different color from "Scheduled" activities.




- Define the name, conditions and colors used by calendar entries as in the interface settings, see [Calendar Tab](#) on page 227.
- Click in the **Text** column to define the text displayed in calendar entries, see [Defining the Text Displayed in Calendar Entries](#).
- Enable the **Fixed Default** check box to deny access to the  (**Settings**) button in the level header. This prevents users from changing the color settings in the calendar.

Settings

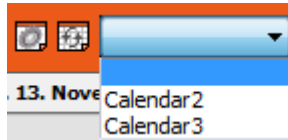
Use the options under **Settings** to define the following calendar settings:




- **Use Default:** Enable this check box to determine that the work hours and colors defined in the interface settings should be used, see [Calendar Tab](#) on page 227. Disable the **Use Default** check box and click on **Modify** to define level-specific settings. The window that opens when you click on **Modify** contains the default Aurea CRM settings, not the current interface settings.
- **Fixed Default:** Enable this check box to prevent users from being able to edit the calendar settings. The  (**Settings**) button is then disabled.
- **User as Fixed Default:** Enable this check box to prevent users from being able to change the settings defined in the list below (the **Rep** and **Active Reps** lists in the **Appointment Settings** window and the **Representative** list in the calendar settings are disabled).

If you select entries in the list but leave **User as fixed default** disabled, the settings are applied until changed by the user.

- **Views:** You can define additional calendar views that users can select from a drop-down list in the calendar's header:



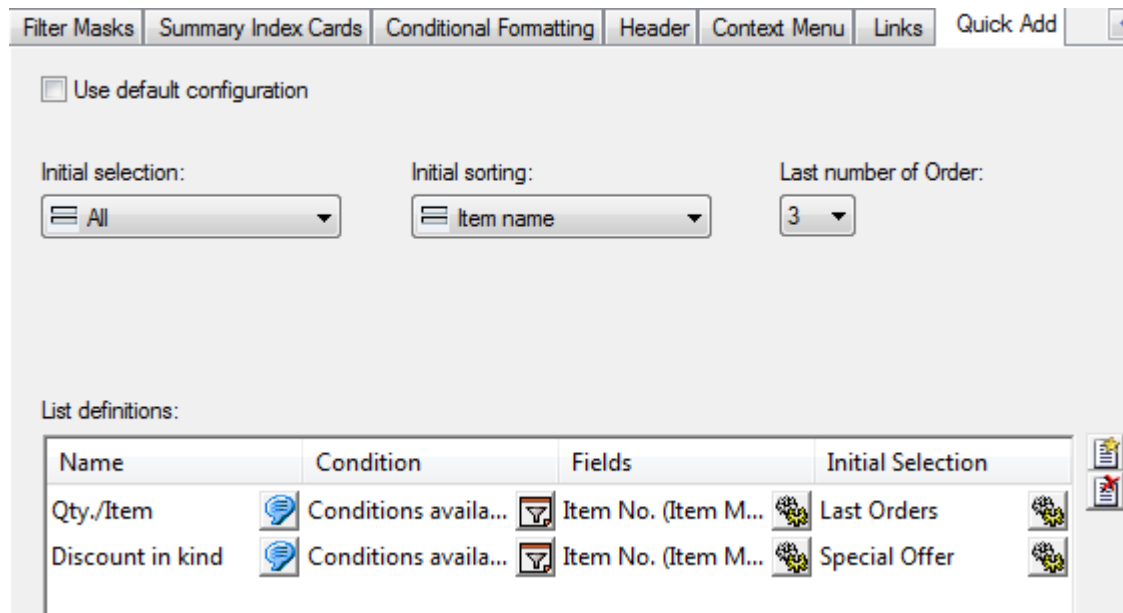
To define additional views:

1. Click on  (**New**) to the right of the **Views** field.
The **Define View** window opens.
2. Define the desired settings.
3. Enter a **Name** for the view.
4. Click on **OK**.

Quick Add Tab (OTC only)

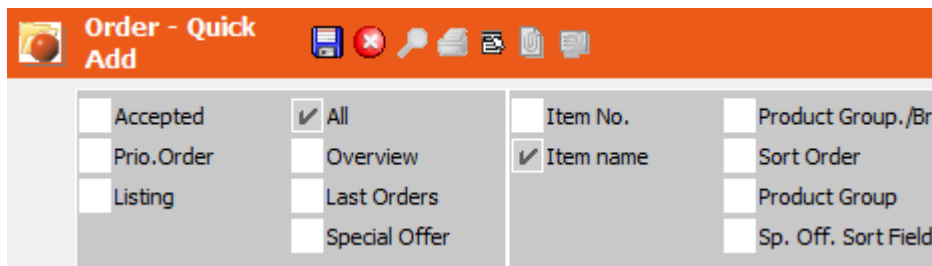
Use the **Quick Add** tab to define default values and lists used by the quick add functionality (e.g. for orders).

For further information on the quick add functionality, see [Quick Add](#) in the OTC Business Logic Manual.



Initial selection/Initial sorting

Users can determine which items should be displayed and how items are sorted during quick add.



To define default values, select the desired option from the **Initial selection** and **Initial sorting** drop-down lists.

Last number of Order

The **Last Orders** option in the **Order - Quick Add** info area displays all items used in the most recent orders. Determine the number of recent orders to take into account in the **Last number of Order** field (up to a maximum of 3).


These settings are also available for the **POS - Quick Add** and **Competition - Quick Add** info areas.

List definitions

You can determine that different lists are displayed depending on the contents of the parent record, e.g. you can display a list used to enter quantities and discounts in kind for orders containing a special offer, see [Defining Lists for Quick Add Levels](#).

Defining Lists for Quick Add Levels

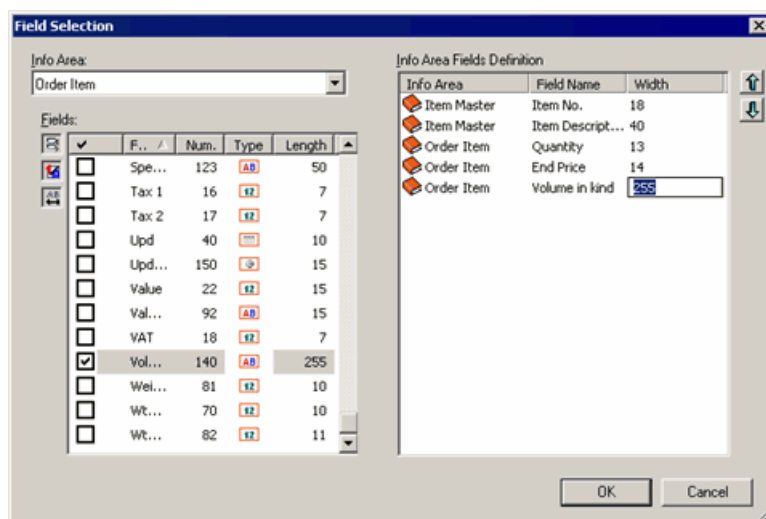
To define a list for a quick add level

1. Click on  (**New**) next to the **List Definitions** field on the **Quick Add** tab.
2. Enter a name for the list in the **Edit text** window.
3. Click on **OK**.

The **Field Selection** window opens.

4. Select a field and define a condition that determines when the list should be displayed, >> Conditions in the User Manual.
5. Click on **OK**.

The **Field Selection** window opens.



6. Select the quick add fields. All fields in the **Item Master** and current info area are available. Use the arrow button to change the field order. Click on an entry in the **Width** column to change the column width (max. 255).

7. Click on **OK**.

The **Define Initial Selection** window is displayed.

8. Select the desired setting. This value replaces the value selected on the **Quick Add** tab.

9. Click on **OK**.

The list is listed under **List definitions**. Click on the icons in the list (**Name**, **Search Crit.**, **Info Area Fields**, **Initial Selection**) to edit your settings.

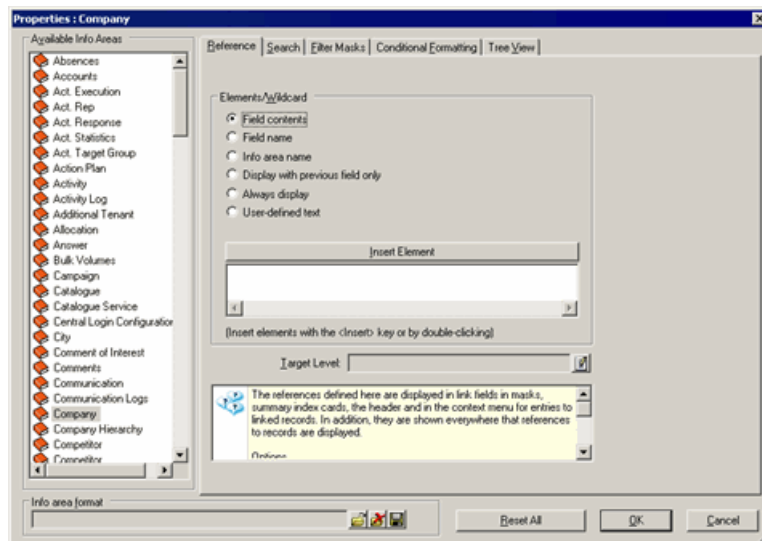
The lines are processed sequentially. The list defined for the first condition a record fulfills is used. You can edit the order by dragging entries with the mouse.

Info Area Settings


Learn how to define user interface settings for individual info areas.

Follow the below steps:


1. Select **Extras > Define Desktop** from the menu.
2. Load the desktop format you wish to configure.
3. Click the **Info Areas** button in the **Define Desktop** window.



All info areas you can access based on your access rights are listed under **Available Info Areas**.

4. Click on  (**Load**) next to the **Info Area Format** field to load an existing format.
5. Select the info area you wish to configure.

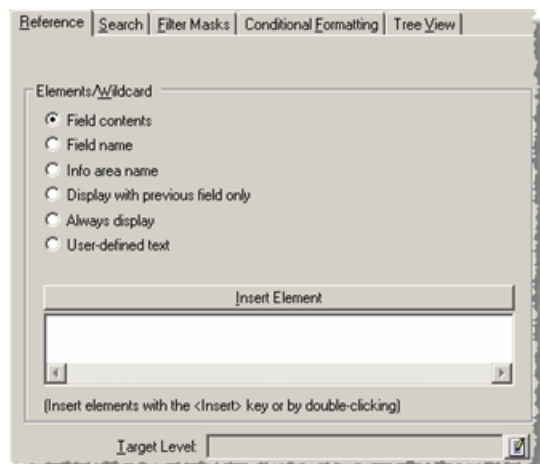
Info areas for which settings have already been configured are indicated with a red tick below the info area icon.

6. Define the desired settings:
 - **Reference:** Use the **Reference** tab to define references displayed in the header, link fields etc., see [Reference Tab](#) on page 292.
 - **Search:** Use the **Search** tab to configure the search settings for the info area, see [Search Tab](#) on page 295.
 - **Filter Masks:** Use the **Filter Masks** tab to define filter masks for the info area, see [Filter Masks Tab](#) on page 296.
 - **Conditional Formatting:** Use the **Conditional Formatting** tab to configure the appearance of the info area based on the contents of records, see [Conditional Formatting Tab](#) on page 296.
 - **Tree View:** Use the **Tree View** tab to configure the tree view, see [Tree View Tab](#) on page 297.
7. Click on  (**Save**) next to the **Info Area Format** field to save the format, see Saving, Loading and Deleting Formats in the User Manual.
8. Click on **OK**.
9. Save the desktop format.

Note: If you are editing an existing format, you only need to save the user interface format and not the desktop format, as the desktop format only contains a reference to the user interface format.

Reference Tab

Use the **Reference** tab to define references and target levels.



The reference is the text displayed for a record in link fields, links in the context menu and in e-mails, in summary index cards and in the tree view.

By default, the name of the level is displayed in the header (e.g. **Company+Person**). Level names can be changed on the **Navigation** tab, see [Navigation Tab](#) on page 250.

To display the reference in the header instead of the level name, disable the **Show reference** option on the **Context Menu/Header** tab in the user interface settings, see [Context Menu/Header Tab](#) on page 230. If a level contains several info areas, select the info area whose reference should be displayed in the header on the **Header** tab in the level properties, see [Header Tab](#) on page 264.

The default reference is displayed if you enable the **Show reference** option but have not defined a reference for the info areas in the level (e.g. "Company: <company name>" is displayed in the **Company+Person** level).

You can also define references directly in the data model using corresponding configuration entries, see [Data Model](#) in the *CRM.core Administrator Guide* (**Reference Text** option). The desktop settings take precedence over settings in the **Configuration** info area.

To define a reference:

1. Select the desired info area under **Available Info Areas**.
2. Switch to the **Reference** tab.

Add the desired elements under **Elements/Wildcard**. You can freely combine elements.

The following options are available:

- **Field Content:** Select this option and click on **Insert Elements** to open a list of fields in the selected info area. Enable the check box next to the field whose contents should be displayed in the reference and click on **OK**.
- **Field Name:** Select this option and click on **Insert Elements** to open a list of fields in the selected info area. Enable the check box next to the field whose name should be displayed in the reference and click on **OK**.
- **Info Area Name:** Select this option and click on **Insert Elements** to open a list of available info areas. Enable the check box next to the info area whose name should be displayed in the reference and click on **OK**.
- **Display with Previous Field Only:** Select this option and click on **Insert Elements** to add the "{<}" placeholder. The next element added to the reference is then only displayed if the element before the placeholder is not empty.

Example (Person in Company info area): "{2KP0*Form of address}{<} {2KP3*First Name} {2KP2*Last Name}": The space between the form of address and first name is only displayed for records containing a form of address.

- **Always Display:** By default, text elements are only displayed if the following element is not empty. Select this option and click on **Insert Elements** to add the "{.}" placeholder. The next element you add is then displayed even if the following element is empty.

Example: "{2KP}{.}: {2KP0*Form of address}{<} {2KP3*First Name} {2KP2*Last Name}": The text element ": " following the info area name is displayed even if the **Form of address** field is empty.

- **User-defined Text:** Select this option and click on **Insert Elements** to add text (including punctuation and spaces), see [Defining Multilingual References](#).

3. Save the info area format.

The reference

```
"{2KP}{.}: {2KP0*Form of address}{<} {2KP3*First Name} {2KP2*Last Name} - {2KP11*"Department"}: {2KP11*Department}"
```

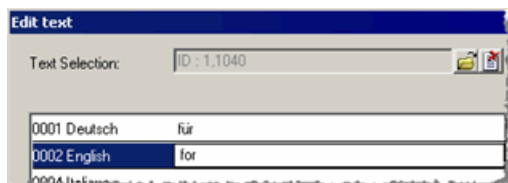
is displayed as:

[Person: Mr. Peter Parker - Division: Development](#) .

Defining Multilingual References

To display references correctly in all languages, you need to define the text elements for all languages. To define a reference in several languages, such as "Reminder: <Subject> for <Rep>" for the **Reminder** info area:

1. Select the desired info area (e.g. **Reminder**) under **Available Info Areas**.
2. Switch to the **Reference** tab.
3. Select the **Info Area Name** option.
4. Click the **Insert Elements** button.
5. Select "Reminder" from the list and confirm with **OK**.
6. Select the **Text** option and click on **Insert Elements**.
7. Enter the text in the available languages (e.g. " for ", " für " etc.).



Note: Include the spaces in the text element. If you add the space directly (i.e. not using the **Insert Elements** button), the space is only displayed in the current language.

8. Click on **OK**.
9. Select the **Field Content** option and click on **Insert Elements**.
10. Select the **Rep/Group** field and click **OK**.
11. Save the info area format.

The reference is displayed as follows (e.g. as a tooltip):

Reminder for Andrea Marr or Erinnerung für Andrea Marr

Selecting the Target Level

You can determine which level an info area is opened in by default in the **Reference** tab.

1. Click on  (**Edit**) next to the **Target Level** field and select a level.

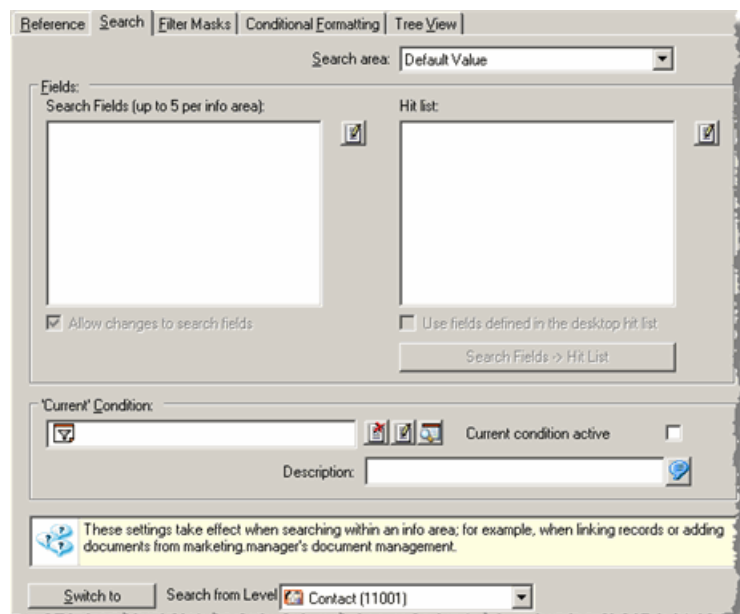
The target level is used by the following functions:

- Link in reports
- Custom links

This setting is only used by levels for which you have **not** defined a target level on the **Links** tab in the level properties, see [Defining Links](#).


Search Tab

Use the **Search** tab to configure the info area's search.



The search is configured in the same manner as for levels, see [Search Tab](#) on page 262.

In addition, you can define search conditions for each info area. This allows you to exclude certain records from the search, for example inactive person records or appointments that have been missed.

1. Double-click on  in the '**Current Condition**' field, see [Conditions](#) in the *User Manual*.
2. Define the condition.
3. Enable the **Current condition active** check box to activate the condition when the search is opened.
4. Enter a **Description** of the condition. It is displayed as a tooltip for the **Current condition active** check box in the search mask, see [Searching](#) in the User Manual.

Search settings can also be defined per level, see [Search Tab](#) on page 262. Select a level from the **Search from Level** drop-down list and click on **Switch to** to open and edit the level-specific search settings.

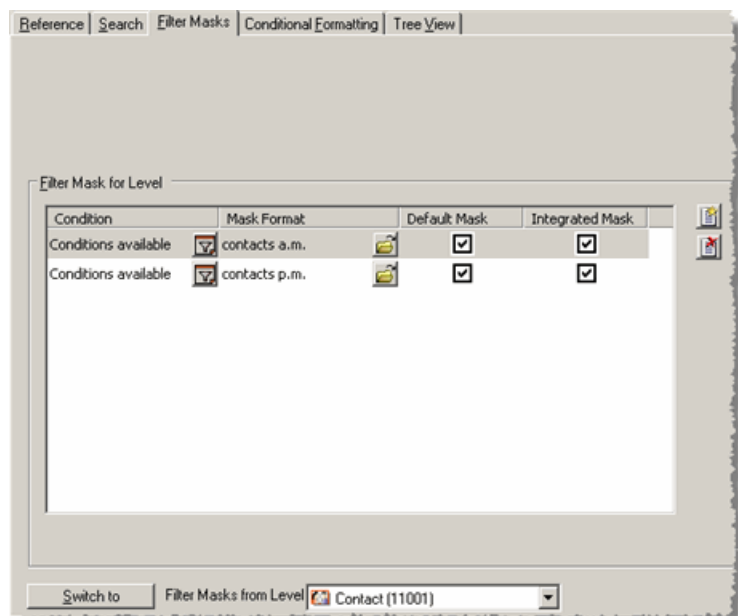
Note: If you have defined both level-specific and info area-specific search settings, the level settings are used (in addition to any search criteria defined for the info area).

If the search is accessed from a link field using , the info area settings are applied.

Use the **Links** tab to define record contents in the source info area to be used as search criteria when linking records, see [Using Field Contents as Search Criteria](#). This setting takes precedence over the search fields defined for the info area in the info area settings.

Filter Masks Tab

Use the **Filter Masks** tab to define filter masks for the info area.



Filter masks for info areas are defined in the same manner as for levels, see [Filter Masks Tab](#) on page 253.

To use filter masks defined for an info area in a level, enable the **Use filter masks from info area** option on the **Filter Masks** tab in the level properties, and select the info area from the drop-down list.

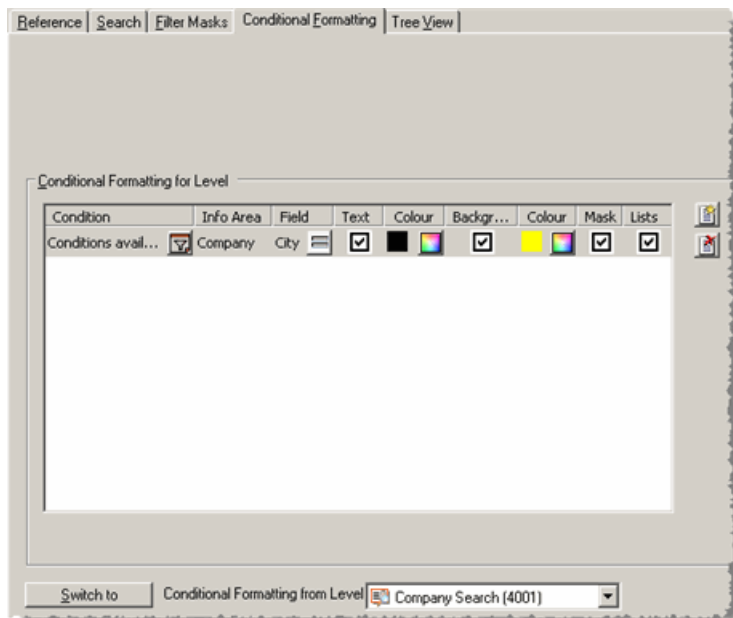
Available filter masks are automatically applied to the details view in the tree view, see [Tree View Tab](#) on page 297.

Select a level from the **Filter Masks from Level** drop-down list and click on **Switch to** to open and edit the level-specific filter masks.

Conditional Formatting Tab

Use the **Conditional Formatting** tab to configure the appearance of the info area based on the contents of the current record.

Conditional formatting for info areas is defined in the same manner as for levels, see [Conditional Formatting Tab](#) on page 256.



To use conditional formatting defined for an info area in a level, enable the **Use conditional formatting from info area** option on the **Conditional Formatting** tab in the level properties, and select the info area from the drop-down list.

Select a level from the **Conditional Formatting from Level** drop-down list and click on **Switch to** to open and edit the level-specific conditional formatting.

Note: The **Use conditional formatting** from info area setting must be enabled for workflow levels to use conditional formatting in workflows.

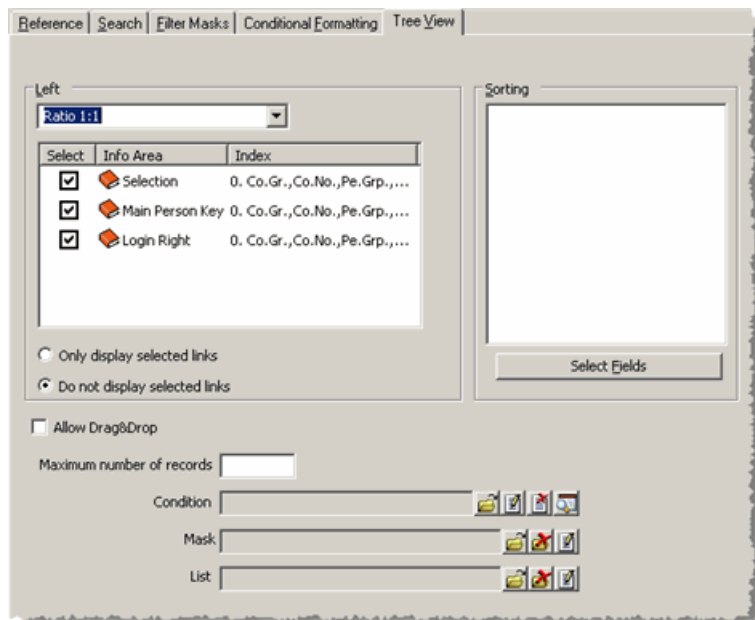
Tree View Tab

Use the **Tree View** tab to configure the info area's tree view.

The tree view depicts relationships between records (parent and child records are displayed), see [Tree View](#) in the *User Manual*.

To configure the tree view for an info area (e.g. **Person**):

1. Select the desired info area under **Available Info Areas**.
2. Switch to the **Tree View** tab.



3. Select one of the following options:

- **Only display selected links:** Determines that the info areas for which the check box is enabled in the **Select** column **are** displayed in tree view.
- **Do not display selected links:** Determines that the info areas for which the check box is enabled in the **Select** column **are not** displayed in tree view.




4. Select a ratio under **Links** to display the linked info areas. Determine which info areas should be displayed in tree view.

Only records in the selected info areas are displayed when the tree view is opened (e.g. for a person record).

5. Determine how records are displayed in the tree view:

- Select an info area under **Available Info Areas** (e.g. **Activity**).
- Switch to the **Tree View** tab.
- Click the **Select Fields** button under **Sorting**.
- Select (up to 5) fields used to sort records in the selected info area.
- Click on **OK**.
- Enable or disable the **Allow Drag&Drop** check box as desired. If the option is enabled, users can move records in this info area between parent nodes (e.g. move an activity from one person to another), as well as merge companies and persons.

If the check box is gray, the setting defined in the **Configuration** info area applies, see [General Settings](#) in the *CRM.core Administrator Guide* (**Drag&Drop in Tree View** option).

- g. Determine the **Maximum number of records** in this info area to be displayed in the tree view. If you leave the field empty, all records are displayed.
- h. Click on  (**Edit**) next to the **Condition** field to define a condition that determines which records should be displayed in the tree view (e.g. only activities whose **Status** is "Open"), [Conditions in the User Manual](#).
- i. Click on  (**Edit**) next to the **Mask** or **List** fields to load a mask or list to be used by records selected in the tree view, see [Mask Generator](#) on page 169. Alternatively, click on  (**Load**) to load an existing format.

If you do not specify a mask, the custom mask is displayed. If you do not specify a list, the **List** option is unavailable from the context menu in the tree view.

Loading a list has no effect on 1:1 links, and the **List** option is always available.

If you have defined filter masks for the selected info area, the filter masks are used instead of the mask entered in the **Mask** field, see [Filter Masks Tab](#) on page 296.

6. Configure any further info areas.

7. Save the info area format.

In order for users to be able to access the tree view, you need to add a link to the **Tree View** level to either the icon bar or define a context menu for each info area, see [Accessing the Tree View from the Context Menu](#) on page 272.

Records are displayed using the references defined in the info area settings, see [Reference Tab](#) on page 292.

The text and background color of the root node is taken from the list bar colors in the current color scheme, see [Configuring the Appearance of the Selected Record](#) on page 199.

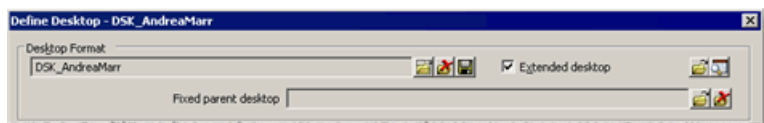
Extended Desktops

You can create hierarchies of desktop formats and inherit settings that should apply globally.

You then only need to define a small subset of changes to the format for individual departments or users.

To define a desktop as an extended desktop:


1. Select **Extras > Define Desktop** from the menu.
2. Load the desired desktop format.
3. Enable the **Extended Desktop** check box.

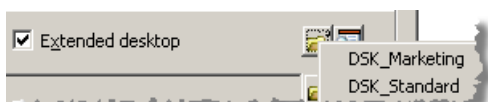


4. You have the following options:

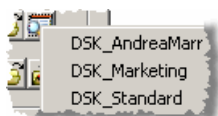
- If you enable only the **Extended desktop** check box, the extended desktop inherits settings based on where the desktop is assigned. Extended desktops defined for login roles inherit the settings defined for the rep; extended desktops defined for reps inherit the group desktop settings; extend group desktops inherit the station desktop settings.

Settings in desktops assigned to roles are inherited according to the priority entered in the login role.

- Enable the **Extended Desktop** option and select a desktop in the **Fixed parent desktop** field to define the current desktop as a child of the selected desktop.
- Click on  (**Load parent desktops**) to load and edit the parent desktop's settings.



- Click on  (**View**) to display a print preview of the desktop format:



5. The **Inherit configuration** check box is displayed in the windows in the desktop settings and is enabled by default.

The settings in the parent desktop are applied to the extended desktop.

Note: The **Inherit configuration** check box is not present in the **Icon Bar Properties** window. The names of levels, workflows and dashboards in the child desktop are used. If no name has been defined for an element, the name is applied from the parent desktop.

Note: The global interface settings are **not** inherited, see [Configuring the User Interface](#) on page 223. The interface format defined in the current desktop is always used.

6. Disable the **Inherit configuration** check box and make the desired settings.

If you enable the **Inherit configuration** check box on the **Links** and **Context Menu** tabs in the level properties, the **Group links** or **Group menus** check box is displayed. Enable the check box to combine the links and context menu options in both the parent and current desktop, instead of only applying those defined in the child desktop.

The type, format and level are compared for context menu entries; the link type, source and target info areas are compared for links. If duplicate entries exist, the entry defined for the current desktop is used.

Example: The current desktop contains a context menu entry of the type **Level**, which is only displayed in view mode, see [Context Menu Tab](#) on page 268 (**Mode > View**). The same context menu entry is active in the parent desktop in display, new and edit mode.

In this case, the current desktop's settings are applied, and the entry is only displayed in view mode.

7. Save the desktop format.
8. Click on **OK**.

Defining New Levels

You can define new info areas in the **Data Model** in the **Maintenance** module.

For further details, see [Adding New Info Areas](#) in the ***CRM.core Administrator Guide***.

You need to include new info areas in a level to access the info area in Aurea CRM win.

Level definitions are automatically saved in a format of the type "Defined levels", see [Formats](#) in the *User Manual*.

To define a new level:

1. Select **Extras > Define Desktop** from the menu.
2. Click the **Define Levels** button.

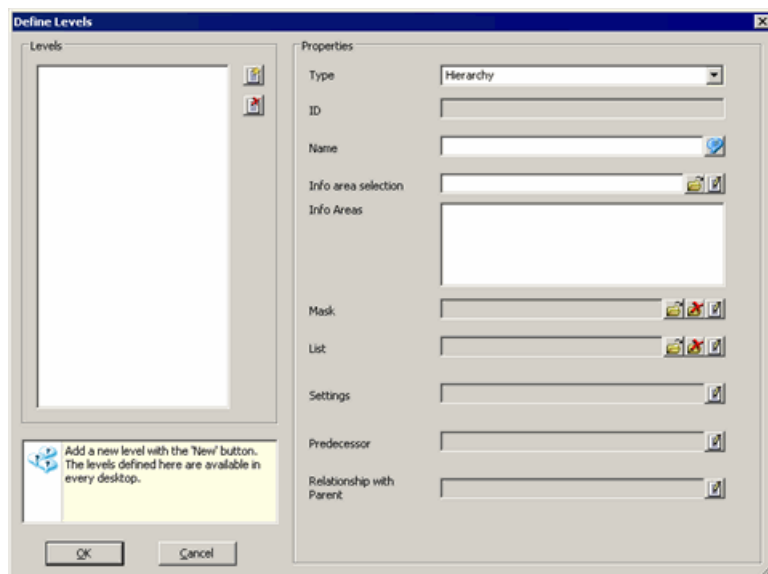
The **Select User Group** window is displayed.

3. Specify whether you are an **Aurea** employee, a **Partner** of Aurea, or a **Customer**. Level IDs are assigned from different number ranges depending on your choice.

Note: You require a password for the **Aurea** and **Partner** options.

4. Click on **OK**.

The **Define Levels** window is displayed.



5. Click on  (**New**) to the right of the **Levels** list.

The **Edit ID** window opens.

The level ID is generated automatically. To change the ID, select the **User Settings** option and enter the desired number. Any number divisible by 1,000 in the applicable number range is allowed (e.g. 200,000,000 - 299,999,000 for customers).

6. Click on **OK**.



The **Edit text** window is displayed.

7. Enter the name of the level.

8. Click on **OK**.

The new level is listed under **Levels**.



Select a level from the list and click on  (**Delete**) to delete the level.

Note: The  (**New**) and  (**Delete**) buttons are only available on the main station. If a level no longer exists, all links to the level are deleted when the desktop is loaded. The IDs of deleted levels are not reused.

9. Select the **Type** of level (**Standard Level**, **Start Page** or **Hierarchy**).

Note: You do not need to define a mask or list for start pages. The level commands (e.g. navigation buttons etc.) are unavailable in the level settings for start pages, and the corresponding flags are also unavailable.

For details on defining hierarchic levels, see [Defining Hierarchic Levels](#) on page 310.



10. Click on  (**Edit**) next to the **Info area selection** field to define a transfer fields format. Alternatively, click on  (**Load**) to load an existing format.

The transfer field format must contain all info areas to be displayed in the level, >> Transfer Fields in the User Manual. Only one info area in the transfer format may be defined as a root info area. All other info areas need to be dependent on the root info area.


The following settings in the transfer fields format are used to display data: info areas, index relationships, conditions, sort order and the maximum number of records. You do not need to select any fields.

Note: If you wish to access the level using a custom link, you need to select the corresponding **Index** in the transfer field format (link IDs 126 or 127).

The info areas in the transfer format are listed under **Info areas**.

11. Click on  (**Edit**) next to the **Mask** or **List** fields to define a list to be used by the level, see [Mask Generator](#) on page 169. Alternatively, click on  (**Load**) to load an existing format.

Click on  (**Delete**) to remove the selected format.

12. Click on  (**Edit**) next to the **Settings** field to configure the general settings for the level, see [Level Settings](#) on page 304.

13. If you are defining a dependent level:

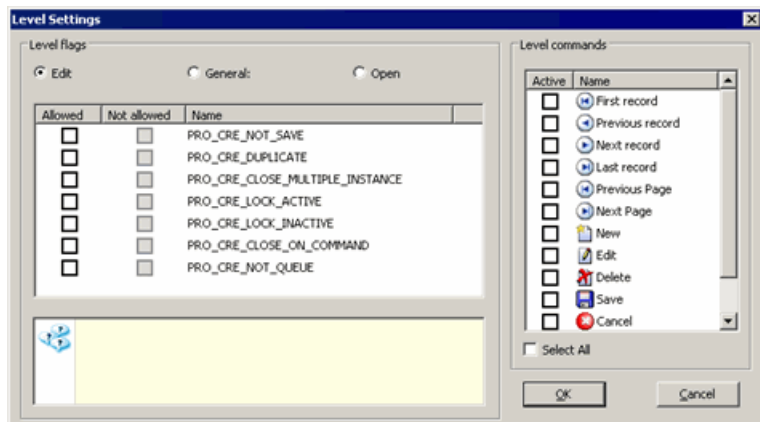
- Click on  (**Edit**) next to the **Predecessor** field to configure the parent level, see [Defining Parent Levels](#) on page 309.
- Alternatively, click on  (**Edit**) next to the **Relationship with Parent** to define valid parent levels based on the info areas in the parent level, see [Defining the Relationship with the Parent Level](#) on page 309.

14. Click on **OK**.

The new level is listed under **Available Levels** as a child of the parent level. The level can be configured in all desktop formats, see [Accessing the Level](#) in the *CRM.core Administrator Guide* and [Level Properties](#) on page 248.

Level Settings

The **Level Settings** window is used to determine general settings for the level.



Follow the below steps:

1. Choose one of the categories: **Edit**, **General** or **Open**. For each option in the list, determine whether the option is **Permitted** or **Not permitted**, see [Edit Options](#), [General Options](#) and [Open Options](#).
2. Enable the check boxes under **Level commands** to determine which buttons are displayed in the level header. Enable **Select All** to select all options.

Note: Include only the buttons required based on your settings in step 1. These settings are applied to all variants of the level, irrespective of the parent level.

3. Click on **OK**.

Edit Options

PRO_MULTIPLE_INSTANCES	The level can only be opened once.
PRO_SAVE	Not allowed: The last settings used are not saved for this level (i.e. mask, conditions, sort criteria).
PRO_FILTER	Not allowed: Conditions cannot be applied to the level. The corresponding options in the menu are disabled. However, you can still apply autofilters.
PRO_SEARCH	Not allowed: The search is disabled for this level. The Search options in the header and menu are disabled.
PRO_MODE_SCROLL	Not allowed: View mode is disabled for the level. The level is opened in either new or edit mode.
PRO_MODE_INSERT	Not allowed: New mode is disabled for the level. Clicking the New button has no effect.
PRO_MODE_UPDATE	Not allowed: Edit mode is disabled for the level. Clicking the Edit button has no effect.
PRO_NEW	Not allowed: Templates cannot be defined for new records in the New - Templates tab in the desktop settings.

General Options

PRO_UI_MASK	Not allowed: Mask view is disabled. The level is loaded with the custom mask. The menu options used to load masks are disabled and corresponding entries in the desktop settings are disabled.
PRO_UI_LIST	Not allowed: List view is disabled. The List button in the level header is disabled.
PRO_UI_MASK2	Not allowed: The custom mask is disabled for this level. The menu option used to load the custom mask is disabled.
PRO_UI_INTEGRATE	Allowed: The level is always displayed in integrated view. Not allowed: The level may not be displayed in the integrated view. The button used to switch to the integrated view in the level header is not displayed.
PRO_UI_INTEGRATE_CHILD	Allowed: Child levels are always displayed in integrated mode. Not allowed: Child levels cannot be displayed in integrated mode.
PRO_UI_INTEGRATE_HORZ	Allowed: Dependent levels are integrated horizontally when they are first opened.
PRO_UI_INTEGRATE_VERT	Allowed: Dependent levels are integrated vertically when they are first opened.
PRO_UI_LIST_TOTAL	Not allowed: Sum totals are not permitted in lists.
PRO_UI_LOAD_PMASK	Not allowed: The summary index card cannot be loaded; the corresponding menu option is disabled.
PRO_UI_LOAD_MASK	No masks can be loaded in mask view.
PRO_UI_LOAD_LIST	No masks can be loaded in list view.
PRO_UI_MASK_HEADER	Not allowed: The level is displayed without the level header. The Header tab in the desktop settings is no longer displayed.

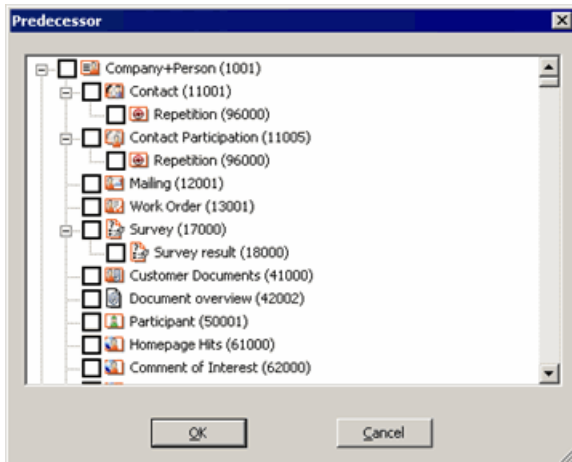
PRO_UI_MASK_CONTEXT	Not allowed: The level is displayed without a context menu. The Context Menu tab in the desktop settings is no longer displayed.
PRO_UI_INFOBAR	Not allowed: The level is displayed without the icon bar.
PRO_UI_NOVGSCROLL	Not allowed: Prevents scrolling between records in parent levels using the summary index card.

Open Options

PRO_CRE_NOT_SAVE	Allowed: The settings last used by the level are not restored when the level is reopened.
PRO_CRE_DUPLICATE	Allowed: A new instance is created each time the level is opened.
PRO_CRE_CLOSE_MULTIPLE_INSTANCE	If multiple instances are not permitted, open instances are automatically closed before opening the new instance.
PRO_CRE_LOCK_ACTIVE	Allowed: No other level can be given focus whilst this level is open.
PRO_CRE_LOCK_INACTIVE	Allowed: The level cannot be given focus.
PRO_CRE_CLOSE_ON_COMMAND	Allowed: Clicking on OK , Save or Cancel automatically closes the level.
PRO_CRE_NOTQUEUE	Allowed: The level is not stored in the history (i.e. you cannot return to the level using the Back and Forwards buttons).

Defining Parent Levels

Learn how to define parent levels for info areas.



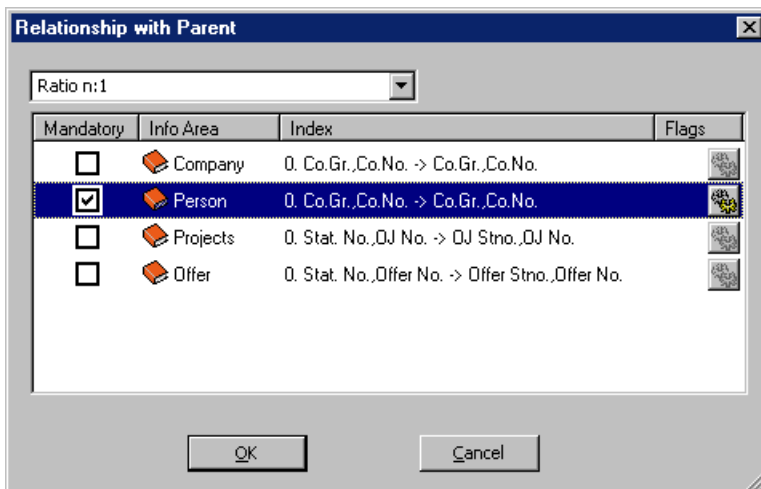
All levels containing an info area linked to the current level's parent info area are displayed. Select one or more levels and confirm with **OK**.

The new level can only be opened if one of the defined parent levels is opened.

Defining the Relationship with the Parent Level

You can determine which info areas and indices are used to link to the parent level.


A valid parent level is then determined at runtime.



1. Choose a link type (1:1, 1:n or n:1).

A list of all info areas linked to the current level's parent info area via the selected link type is displayed.

The index is displayed in the **Index** column.

2. Enable the **Mandatory** check box for the desired info areas.
3. Click on  (**Flags**) to determine when the level is a valid parent level:
 - PRO_PREL_MUST: The info area must be present in the parent level.
 - PRO_PREL_MUSTNOT: The info area must not be present in the parent level.
 - PRO_PREL_INCLUSIVE: At least one of the info areas with this setting enabled must be present in the parent level.
 - PRO_PREL_EXCLUSIVE: At most one of the info areas with this setting enabled may be present in the parent level.
 - PRO_PREL_MUST_POS1: This info area must be the first info area defined in the parent level (in the order specified under **Data > Sequence**).
 - PRO_PREL_MUSTNOT_POS1: This info area may not be the first info area defined in the parent level.
 - PRO_PREL_KEY: The info area is used to form the key. The system automatically uses the station number and serial number entered in the corresponding parent record when adding new records.

Defining Hierarchic Levels

You can display records in the tree view in hierarchic levels.

For further information on hierarchic levels, see [Hierarchic Levels](#) in the User Manual.

To define hierarchic sub-levels for a level:

1. Define an n:1 link from the info area to itself in the data model, see [Link](#) in the **CRM.core Administrator Guide**.
2. Apply the changes to the current data model.
3. Select **Extras > Define Desktop** from the menu.
4. Define a new level, see [Defining New Levels](#) on page 301.
5. Select "Hierarchy" in the **Type** field under **Properties**.
6. Select the info area contained in the parent level under **Info area selection** (e.g. the **Property** info area (BTB only) for the property hierarchy).

If no **Index** is defined in the settings in the transfer field format, Aurea CRM will search for a suitable index at runtime. If no suitable index is found, the level is not opened.

7. Define a **Mask** with any number of tab groups. The first tab with the following properties is used for the tree view, see [Tab Group Properties](#) on page 185:
 - the tab group must be empty (no fields etc.)
 - the **No tab label** option on the **View** tab must be disabled
 - the **Always visible** option on the **Colors** tab must be enabled
8. Select the desired parent level under **Predecessor** (see [Defining Parent Levels](#) on page 309) and/or define the **Relationship with Parent**, see [Defining the Relationship with the Parent Level](#) on page 309.
9. Click on **OK**.
10. Add an option to the context menu in the parent level used to access the hierarchic view, see [Accessing Levels with the Context Menu](#) on page 270.
11. Save the desktop format.

5

Additional Modules and Applications

Explore additional special features and functions in CRM.Win.

Configuration

Learn about the configuration settings that apply to Aurea CRM win only.

For information on configuration settings of Aurea CRM, see [Configuration](#) in the *CRM.core Administrator Guide*.

mm.ini File

[Communication]

To shorten the duration of outputting and inputting initial data stock downloads, use the following setting in the global `mm.ini` file:

```
[Communication]
FastLoad=*
```

To create initial data stock download fields for specific stations, specify the station numbers:

```
FastLoad=1000,1001,...
```

For details, see [Quick Mode](#).

[SMTP]

The entries for SMTP define the **Aurea CRM win** settings used when:

- Sending e-mails by clicking on an e-mail address field or using the **File > E-mail** or **File > Single Letter** menu options.

The SMTP settings entered in the `mm.ini` file are displayed as the default settings the first time a mail is sent. These values can be changed however, see [SMTP Connection Settings](#) in the *CRM.core Administrator Guide*. Users can save their login data using the **Store credentials** option. The login data is saved in the `smtp.cfg` file in the user directory, and the dialog box containing the connection settings is no longer displayed when sending mails.

The **Connection Settings** dialog is then no longer automatically displayed when sending e-mails. The **Connection Settings** dialog can still be accessed by holding down Shift while selecting **File > E-mail** from the menu.

If a suitable configuration entry is present, the **Connection Settings** dialog is also not displayed.

- Sending mass mailings and e-mails via triggers.

The SMTP settings entered in the mm.ini file are used if no suitable configuration entry or smtp.cfg file is found, see [SMTP Connection Settings](#) in the *CRM.core Administrator Guide*.

To use SMTP, you need to enter "SMTP" as the **E-Mail Client** under **General Settings** in the **Configuration** info area, see [General Settings](#) in the *CRM.core Administrator Guide*.

Mandatory mm.ini entries:

```
smtpHost=<SMTP server name or IP Address>
smtpUser=<SMTP user name>
smtpPass=<SMTP password>
smtpSenderAddr=<The user's e-mail address>
smtpSenderName=<The user's name>
```

Optional entries:

```
smtpPort=<port>
```

The default port is 25.

```
smtpAuth=<Login method>
```

The following login methods are available:

```
0 = AUTH_NONE
1 = AUTH_CRAM_MD5
2 = AUTH_LOGIN
3 = AUTH_PLAIN
4 = AUTH_NTLM
```

Analysis Module

Learn to analyse data and obtain results in Aurea CRM.win.

The **Analysis** module allows you to:

- Analyze data in info areas using your own using criteria.
- Display the results of the analysis as a table, bar or pie chart.
- Export the results to a spreadsheet.

You can also start the analysis module from the command line, see [mman.exe Parameters](#) on page 343.

Users can access the **Analysis** module if they have the necessary access rights, see [Module Access Rights, System Locks and Process Tracking](#) in the *CRM.core Administrator Guide*. However, users may still only access the data they have been granted access to (in the **Rights** module).

Users can define their own analyses in Aurea CRM's main module, see [Analyses](#) in the *User Manual*.

Note: By default, the graphics library from ComponentArt is used. If Aurea CRM is started over the network or .NET Framework 2.0 is not installed, bar and pie charts are displayed using Aurea's graphics. You can define that charts should always be

displayed using Aurea's graphics, see [Analyses](#) in the *CRM.core Administrator Guide*.

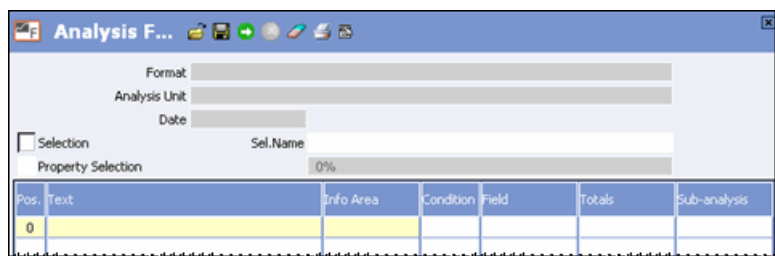
When using the predefined color schemes in Aurea CRM, the colors used by analyses are selected to match the color scheme (ComponentArt bar charts only use one color per row). If you are using a custom color scheme, you should also configure the analysis colors. To do so, select **View > Desktop Properties** from the menu and switch to the **Analyses** tab.

Defining an Analysis

Learn how to define an analysis.

To define an analysis:

1. Start the **Analysis** module, see [Starting Modules](#) on page 13.



2. Enable the **Selection** or **Property Selection** (BTB only) check boxes to restrict the analysis to a predefined selection. Double-click in the **Sel.Name** field to choose a selection.
3. Click in the **Info Area** cell in the first row of the table and select the info area you wish to analyze (e.g. **Company**) and click on **OK**.

Note: To remove an info area from the analysis, click in the **Info Area** column and disable the check box next to the info area. The info area is removed from the table.

4. Click in the **Text** column and edit the text if you wish to change the header used in tables and charts (e.g. "Company Revenue").
5. To restrict the analysis to records that meet specific conditions, click in the **Condition** column and define the condition, see [Conditions](#) in the User Manual.
6. Click in the **Field** column and select the field to be used as the analysis unit, and click **OK**.
7. Define the analysis unit, see [Defining the Analysis Unit](#) on page 315.
8. Click in the **Totals** column to calculate sum totals for each analysis unit. Select the desired field (e.g. "Revenue").

Pos.	Text	Info Area	Condition	Field	Totals	Sub-analysis
0	Company Revenue	Company	✓	Country	Revenue	
1						

9. Click in the **Sub-analysis** cell If you wish to add another analysis unit (e.g. to analyze revenue per country per sector), see [Creating a Sub-analysis](#) on page 317.
10. If you wish to analyze a further info area, define additional lines in the analysis format.

Note: Edit the value in the **Pos.** column to change the order of the info areas. The order of the info areas in the table corresponds to their order in the analysis.

11. Click on  (**Save**), see [Saving, Loading and Deleting Formats](#) in the *User Manual*.

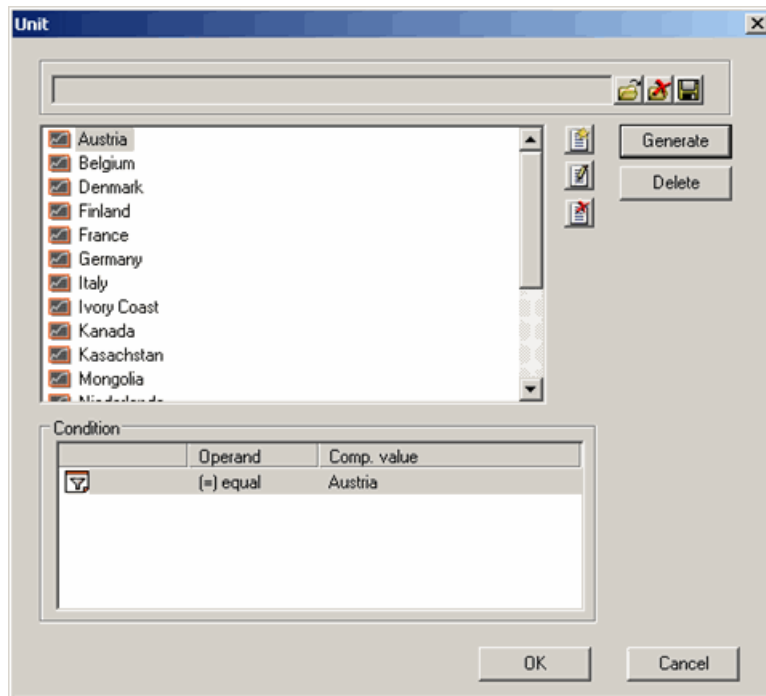
Note: Load an existing format with  (**Load**). Click  (**Delete**) to clear the mask.




Defining the Analysis Unit

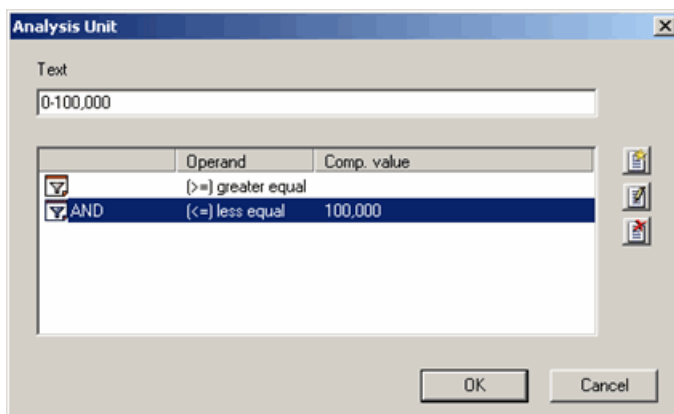
The analysis units you define determine the number of bars in bar charts, slices in pie charts and rows in tables.




To define an analysis unit:

1. Select **Analysis Unit** from the context menu. The **Unit** dialog box is displayed.
2. Click on **Generate**. The **Generate Scale** dialog box is displayed.
3. Enter a value in the **Maximum** field to limit the number of analysis units.
4. Depending on the type of field:
 - **Catalog fields:** Click **OK** if you have selected a catalog field to include all catalog values as analysis units.
 - **Numeric fields:** Enter the upper and lower thresholds in the **From** and **To** fields and enter the interval in the **Intervals** field to generate an automatic scale.
5. The generated scale is displayed. The analysis units are displayed in the upper section. The corresponding condition used to define the analysis unit is displayed under **Condition**.



6. Select an analysis unit and click  (**Delete**) to delete it.
7. Click  (**New**) to add a new analysis unit above the selected one, or click  (**Edit**) to edit the currently selected unit:
 - a. Enter the name of the unit in the **Text** field in the **Analysis Unit** dialog box.



- b. Add or edit conditions used to define units by clicking on  (**New**) or  (**Edit**) respectively. Select the logical operator (AND or OR) used to combine conditions under **Link** and enter the **Comparison value**. Click **OK**.
8. Drag analysis units within the list to change the order in which they are displayed.
9. Click  to save your settings.
10. Click **OK**.

Creating a Sub-analysis

Sub-analyses allow you to refine an analysis using an additional field.

To create a sub-analysis:

1. Click in the **Sub-analysis** column.
2. Select the desired field and click **OK**.
3. Click on **Generate** to define the analysis units, see [Defining the Analysis Unit](#) on page 315.

The main analysis mask is displayed again. The selected field is displayed in the **Sub-analysis** cell.

Executing the Analysis

Learn how to execute the analysis and display results.

Click  (**Start**) to execute the analysis.

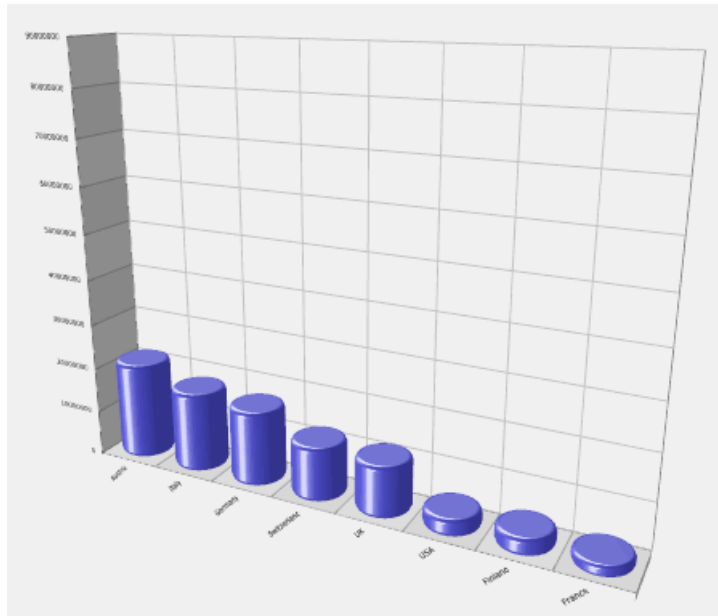
The results of the analysis are displayed in a table.

Analysis Unit	Company Revenue
0. Austria	4
1. Finland	1
2. France	1
3. Germany	20
4. Italy	22
5. Switzerland	4
6. UK	41
7. USA	6
Sum	271,980,900
Sum Total	271,980,900

- **Sum:** The sum total for all records that fall within the defined range of possible values defined for your analysis unit.
- **Sum Total:** The sum total for all records, including those outside the range (in the example above, this would be companies in other countries from those listed).

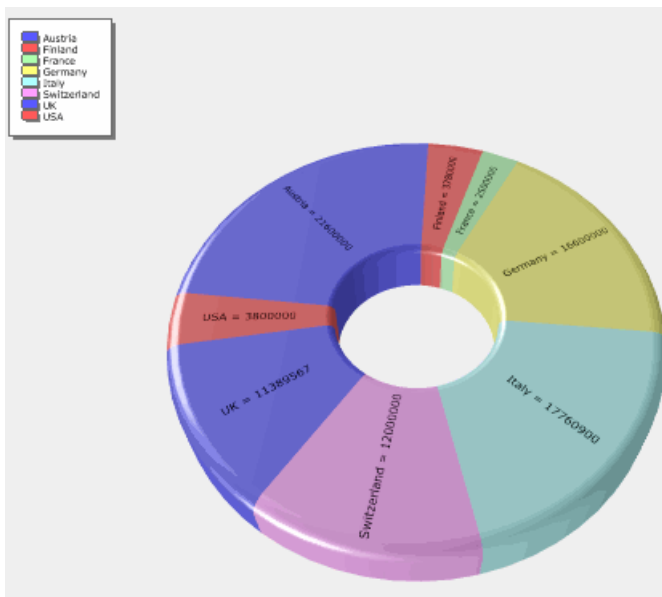
Use the following options to change the view:

- Select **Percent**, **Absolute** or **Totals** from the drop-down list to determine the data displayed in the table.
- Select **<** or **>** from the context menu to edit the table width.
- Select **Diagram** from the context menu to display the analysis as a bar chart:




The following buttons are available when displaying a chart:

- **Options:** Opens the **Options** dialog box, see [Options](#) on page 319.
- **Zoom:** Opens the chart in a second window which can be resized.
- **Pie Chart / Bar Chart:** Switches between a bar chart and pie chart.



- **Percent / Absolute:** Switches between displaying percentages and absolute values.
- **Sub-analysis:** Switches to the results of the sub-analysis. The **<**, **>**, **Diagram** and **Transfer** options are again available from the context menu in the sub-analysis.

Analysis Unit	Hardware	Services	Software	Sum
(0) Austria		7	93	11
(1) Finland			100	1
(2) France				
(3) Germany	69		31	4
(4) Italy	90	10	0	5
(5) Switzerland	100			1
(6) UK		100		4
(7) USA				
Sum	34	59	7	26

- **Transfer:** Transfers the chart and data to your spreadsheet.
- Click  (**Level back**) to return to the **Analysis Format** info area. The date the analysis is last carried out is entered in the **Date** field. The following options are available from the context menu to export the results or display them again: **Table**, **Diagram**, **Sub-analysis**, **Transfer**.

Options

The options available depend on whether you are displaying a bar chart or pie chart.

Below options are available:

Sort

These options are used to determine how the data in the charts are sorted.

- **Ascending / Descending:** Data in the chart is sorted in ascending or descending order.
- **Alphabetical:** Data is sorted alphabetically.
- **Fixed:** Data is sorted according to the order of the lines in the analysis unit format.

Display decimal places

Determines whether decimal places are displayed.

Alignment Legend/Levels (only pie charts)

- **Left/Right:** Displays the legend to the left or right.
- **Top/Bottom:** Displays the legend at the top or bottom (only for charts using the ComponentArt graphics).
- **Show legend:** Displays the legend.
- **Sum total in legend:** Sum totals are displayed in the legend next to the analysis unit (only for charts using Aurea's graphics).
- **Display labels on pie charts:** Labels are additionally displayed on the chart (only for charts using the ComponentArt graphics).

Text/Caption (only pie charts using Aurea's graphics)

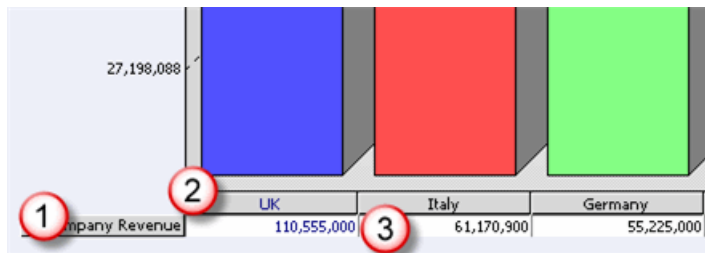
- **Border:** Displays text with a border.
- **Background:** Displays text with a different background color from the chart.

Bar (only bar charts)

- **Scale on the side:** Displays the scale on the left of the chart (only for charts using Aurea's graphics).
- **Scale on background:** The unit of analysis can be shown in the background in addition to or as an alternative to showing the unit of analysis at the side (only for charts using Aurea's graphics).
- **Maximum bar height:** The highest bar value is used to limit the size of the bar chart.
- **Relative bar height:** The cumulative total across all columns is used to limit the size of the bar chart.
- **Visible bars:** Determines the maximum number of bars displayed at once (only for charts using Aurea's graphics).
- **Show totals:** Displays sum totals at the bottom of the chart (only for charts using Aurea's graphics).
- **Split levels:** Levels (several bars behind one another) are split into separate charts (only for charts using Aurea's graphics).

Settings (only bar charts using Aurea's graphics)

Click on the **Levels, Classes and Totals** buttons to define the colors and font used in the following parts of the table (1=Levels, 2=Classes, 3=Totals):



Determine the color of the **Background, Text, Top frame, Bottom frame** as well as the **Font** settings.

protocol.exe

The `protocol.exe` file is included with Aurea CRM. Upon starting Aurea CRM for the first time, the file is registered as the protocol handler for all links that start with `update :/ /`. Executing the exe file also registers it.

When calling such links, `protocol.exe` checks whether the Aurea CRM win main module is running. If so, the contents of the link are transferred to that instance. If the Aurea CRM win main module is not running, the system attempts to start the Aurea CRM win main module from the directory containing `protocol.exe`.

Aurea CRM uses these functions:

- For links in e-mails that open records (**Edit > Send Record as Link to**).
- For popup windows with links to messages or reminders.
- In reports defined using the **Output link** option. A link is created for each record in the report.

You can also:

- Call links from other applications if Aurea CRM is installed and `protocol.exe` is registered.
- Create reports that include links to other levels and serves as a start page.

Loading Records in Aurea CRM

Learn how to load records in Aurea CRM.

Call

```
update://mmba/Navigate/Goto?Key=Rel-KeyFields&Pro=ProId&No=Station
```

Parameters

Rel : Info area abbreviation

KeyFields : The values in the primary key fields, separated by '-'

ProId : The level in which the record should be opened.

Station: The current station number (optional)

Example

```
update://mmba/Navigate/Goto?Key=FI-100-1256
```

Restriction

When targeting dependent levels, it is not possible to guarantee that all parent levels are already opened or is open automatically.

This link can also be generated in Aurea CRM by selecting **Edit > Copy Link to Clipboard** from the menu.

Opening Levels

Learn how to open levels in Aurea CRM.

Call

```
update://mmba/Navigate/Goto?Pro=ProId
```

Parameters

ProId : The level that should be opened

Example

```
update://mmba/Navigate/Goto?Pro=1001
```

Restriction

When targeting dependent levels, it is not possible to guarantee that all parent levels are already opened or opens automatically.

Opening Websites in Aurea CRM

Learn how to open websites in Aurea CRM.

Call:

```
update://mmba/Navigate/Goto?Pro=2410000&Url=URL
```

Parameters:

URL: Address of the website to be opened

Example:

```
update://mmba/Navigate/Goto?Pro=2410000&Url=www.google.at/search?hl=de&q=Sunshine%20%20AG
```

Loading Formats

Learn how to load formats in Aurea CRM.

Call

```
update://mmba/Format/Goto?Name=FormatName&Type=FormatNumber
```

Parameters

FormatName : Name of the format to be opened.

FormatNumber : The number of the format type.

Example

```
update://mmba/Format/Goto?Name=FI_KP_Timeline&Type=30
```

Restriction

The following formats are supported: Workflows (28), dashboards (30), analysis formats (45), XML reports (44). All formats must be level-independent or have an independent level as the root level.

Starting the Search

Learn how to start the search in Aurea CRM.

Call

```
update://mmba/Search/Goto?Pro=ProId
```

Parameters

ProId : The level to be searched. The special searches available for the **Company+Person** and **Property** levels is started. In the case of the **Company+Person** level, either the person or company search is started, depending on which is last active. You can also enter the level number of the special search for companies, persons and properties.

Restriction

When targeting dependent levels, it is not possible to guarantee that all parent levels are already opened or opens automatically.

Displaying Selections

Learn how to display selection in Aurea CRM.

Call

```
update://mmba/Selection/Goto?Name=SelectionName?Key=OJ
```

Parameters

SelectionName : The name of the selection format (must be present for the current user).

Key=OJ: Needs to be included if the selection contains properties (only in the BTB vertical).

Example

```
update://mmba/Selection/Goto?Name=NewProperties?Key=OJ
```

Creating or Expanding a Selection

Learn how to create and expand selection.

Call

```
update://mmba/Selection/Create?Name=SelectionName&File=FileName&Mode=Mode
```

Parameters

SelectionName : The name of the selection to be added or expanded for the current user.

FileName : The name of the file containing the list of record IDs to be included in the selection. This file must be stored in the current user's Aurea CRM directory. The list of record IDs needs to be formatted as follows: Info area abbreviation;Record ID; Record ID ;Info area abbreviation;Record ID;... If you enter the company or person abbreviations, the target is a normal selection; otherwise the selection contains properties.

Mode: There are two possible parameters:

- new: A new selection is created. If a selection with the same name already exists for the current user, the existing selection is overwritten.
- update: An existing selection is expanded to include the transferred records.

Example

```
update://mmba/Selection/Create?Name=MySelection&File=data.txt&Mode=new
```

Chart Structures

Charts allow you to depict relationships between records.

The default configuration of Aurea CRM does not however support the display of charts, which must instead be implemented using an add-on.

Aurea CRM win allows you to generate XML reports that can contain the following data:

- A corporation's structure
- All functions/positions of persons in a company, and all functions that are missing
- Information on properties, including sub-properties, opportunities and participants

The following steps are necessary in Aurea CRM win:

1. Define the chart format, see [Defining a Chart Format](#) on page 325. The chart format determines the name of the chart, and the info area or record type from which the report/chart can be generated.
2. Define the individual chart elements in the chart structure, see [Defining Chart Elements](#) on page 326. The elements determine which records are searched for and how they are included as elements in the report and their relationships with one another.
3. Define an XML report based on the chart structure, see [Defining Reports](#) on page 328.
4. Create the XML report, see [Creating Reports](#) on page 328.

The XML file can be used to display the chart (requires the programming of an add-on).

The following examples cover the most important options when defining charts:

- [Example: All Persons in a Company with Activities](#) on page 330
- [Example: All Persons in a Company with Department Heads](#) on page 332
- [Example: All Persons in a Company with Activities or Notes](#) on page 335
- [Example: Ticket Hierarchy](#) on page 339

Defining a Chart Format

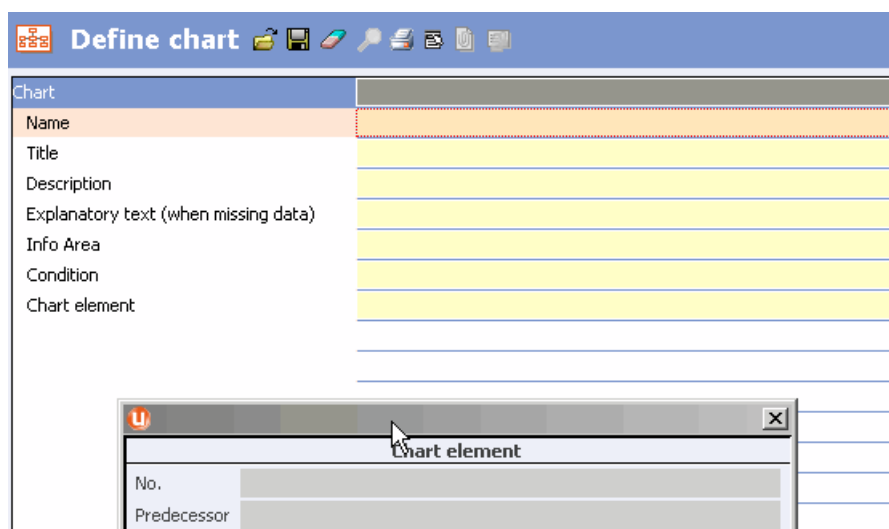
Learn how to define a chart format.

To define a chart format:

1. Open the **Define chart** level in the main module (select **Info > Define chart** from the menu in the Aurea CRM win main module).

Note: The **Define chart** level is disabled by default in the CRM process configuration and is only enabled for the SU. If other users should be able to access this CRM process, you need to grant access to the "Define chart" CRM process in the **CRM Process configuration** level in the **Rights** module, see [CRM Process Configuration](#) in the *CRM.core Administrator Guide*.

2. The window containing all fields in the mask is also opened. Reposition the window so you can enter information on the chart.

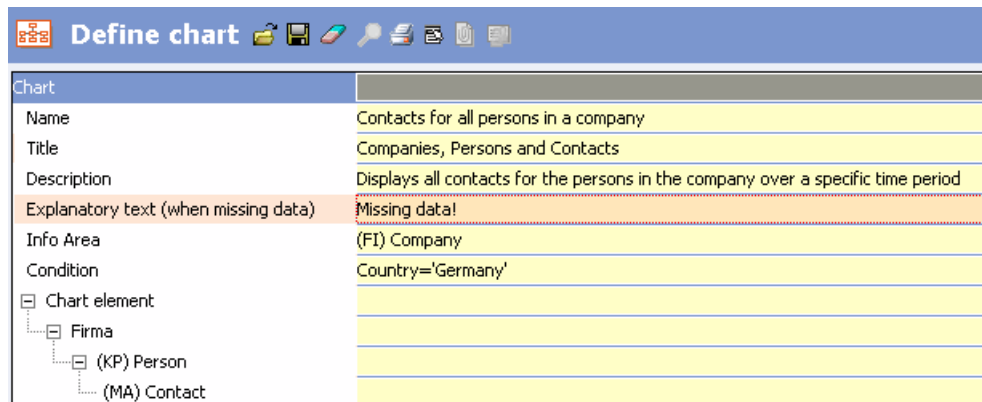


3. Enter the following:
 - **Title:** The chart's title (multi-language text field)
 - **Description:** A description of the chart (multi-language text field)

- **Explanatory text (when missing data):** This text is displayed if no data could be determined to be used in the chart (multi-language text field)
- **Info Area:** The info area that the chart can be accessed from
- **Condition:** A condition that must be met by the record in order for the chart to be accessed (optional parameter)

4. Click on  (**Save**) to save the format.

The name of the format is displayed in the **Name** field. Chart formats are saved in the **Format** info area (**Type:** "Chart")



Define chart	
Chart	
Name	Contacts for all persons in a company
Title	Companies, Persons and Contacts
Description	Displays all contacts for the persons in the company over a specific time period
Explanatory text (when missing data)	Missing data!
Info Area	(FI) Company
Condition	Country='Germany'
Chart element	
Firma	
(KP) Person	
(MA) Contact	

Defining Chart Elements

Chart elements determine which records are read from the database and which record data is used by nodes in the XML output or chart.

To define the elements in a chart format:

1. Click on the **Chart element** entry and select **New** from the context menu.

A new chart element is added.

2. Click on the arrow icon in the **Title** field and enter a title.

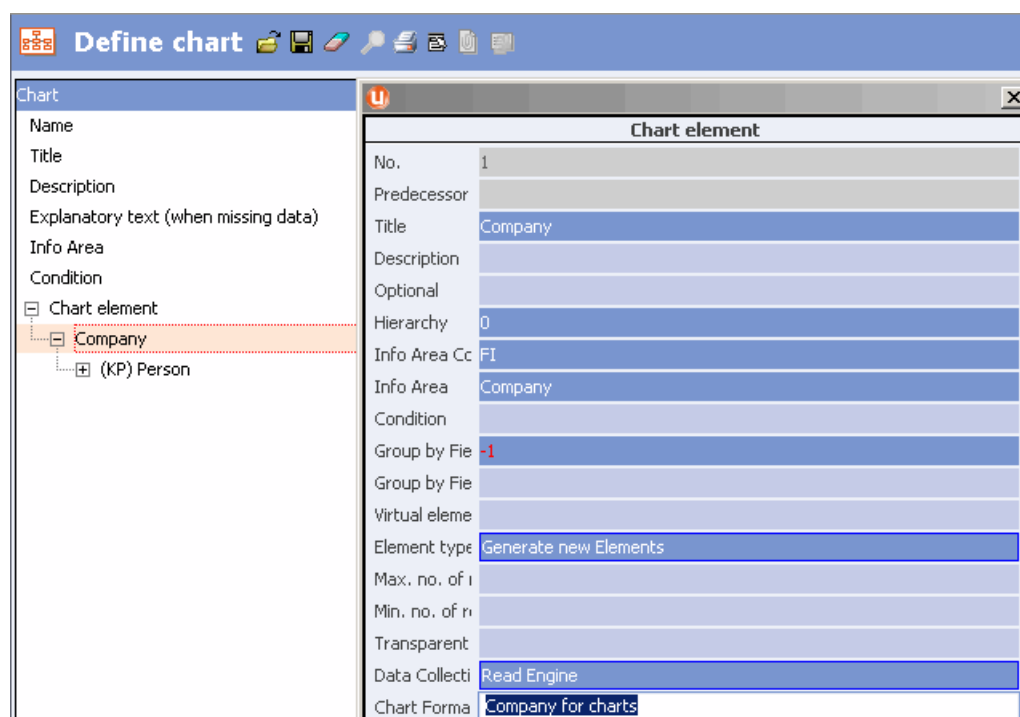
This title is displayed in the hierarchical view of the chart element instead of the automatically assigned ID (**No.** field).

3. Use the following fields to define how the root node of the chart should be determined:

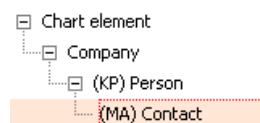
- **Info Area:** Specify the target info area to search for records.
- **Element type:** Determine how records that are found are handled in the report:
 - **Generate new Elements:** A new element (node) is created for the record.
 - **Saves Records:** All records found are grouped in a single element.

- **Data Collection:** Determine whether the data in the chart is determined using transfer fields ("Read Engine") or a global query (Aurea CRM web only).
- **Chart Format:** Double-click in this field and define the fields that should be transferred to the report in a transfer fields format, or select the query.

For more details on transfer fields, see Transfer Fields in the User Manual.



- Use the following fields to define how the root node's children are determined:
 - **Chart Data (Children):** Determine whether the data in the chart is determined using transfer fields ("Read Engine") or a global query (Aurea CRM web only).
 - **Chart Format (Chart Format (Children)):** Double-click in this field and define the fields that should be transferred to the report in a transfer fields format, or select the query.
- You can add additional chart elements to the root node and other chart elements (by selecting **New** from the context menu), allowing you to depict your structure. There is no restriction on the number levels in the hierarchy.



For more information on the individual fields in chart elements, refer to the online field help. You can:

- Define conditions that must be met by records
- Group nodes by catalog value

- Recursively determine the records in the chart
- Link the report to workflows, triggers or Aurea CRM web wizards.

You can use drag & drop to move chart elements within the structure.

Note: Select **View > All Mask Fields** to display the window containing all fields in the mask.

While it is possible to include a variable condition in the chart's definition, the dialog used to enter the variable value is **not** displayed when generating the report.

Defining Reports

Learn how to define reports.

To define a report containing a chart format:

1. Select **Extras > Define Report Format** from the menu.
2. Enter the chart type in the **Select Chart** field.

Note: The **Select Chart** field is used in chart reports instead of the **Select transfer fields** option.

3. Save.

If you have enabled the **Shorten tags and attributes** option, the following chart-specific node names are abbreviated as follows in the XML output:

- "nodes" > "nds"
- "node" > "nd"
- "level" > "lv"
- "groupBy" > "grBy"

For a description of this option and other options used to define reports, see [Defining Report Formats](#) in the *User Manual*.

Creating Reports

The info area and condition defined in a chart format determine the type of record from which the report can be created.

To create a report containing a chart format:

1. Switch to the desired record.
2. Select **File > Report** from the menu.
3. Select the desired report format and confirm with **OK**.

The XML report is displayed.

All texts defined in multiple languages are displayed in the current language.

The following XML elements are used in chart reports:

- <diagram>: Root node, contains all data



```

<?xml version="1.0" ?>
- <diagram>
+ <Version>
  <Headertext />
+ <LocaleSettings>
  <nodes />
+ <definition>
</diagram>

```

- <nodes>: Contains the data structure

```

- <nodes>
- <node id="1" level="0">
  - <tables>
    - <table tableshort="KP" prefix="KP" recid="429496729601">
      <field fieldno="0" fid="0" catNo="0" catval="2">Ms.</field>
      <field fieldno="3" fid="3">Geraldine</field>
      <field fieldno="2" fid="2">Torger</field>
    </table>
  </tables>
</node>
- <node id="1" level="0">
  - <tables>
    - <table tableshort="KP" prefix="KP" recid="429496729608">
      <field fieldno="0" fid="0" catNo="0" catval="1">Mr.</field>
      <field fieldno="3" fid="3">Klaus</field>
      <field fieldno="2" fid="2">Maier</field>
    </table>
  </tables>
</node>

```

- <definition>: Contains the chart's definition

```

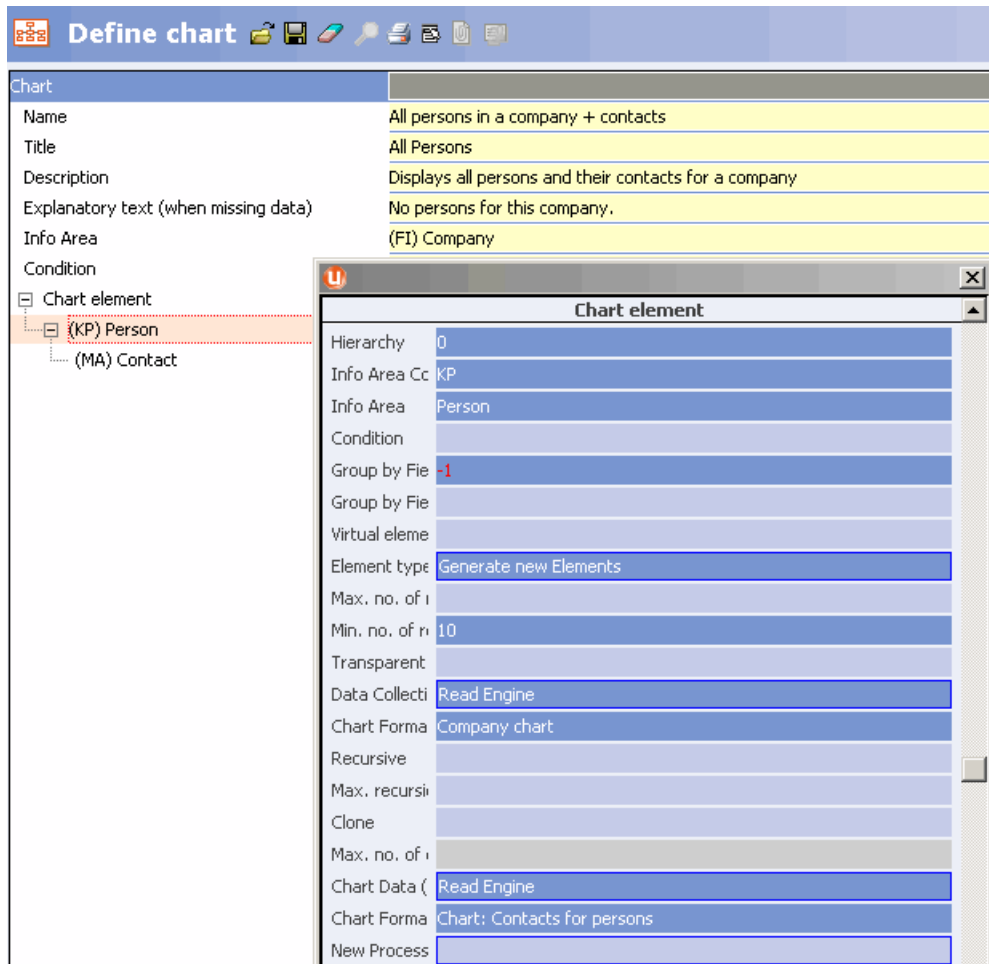
- <definition>
  <title>All Persons</title>
  <description>Shows all persons for a company</description>
  <error>No persons for this company.</error>
- <nodes>
  - <node id="1">
    - <fields>
      <field fieldno="6" fid="6">KP</field>
      <field fieldno="7" fid="7">Person</field>
      <field fieldno="9" fid="9">-1</field>
      <field fieldno="12" fid="12" catNo="0" catval="1">Generate new
        Elements</field>
      <field fieldno="16" fid="16" catNo="0" catval="1">Read Engine</field>
      <field fieldno="17" fid="17">company</field>
    </fields>
  </node>
</nodes>
</definition>

```

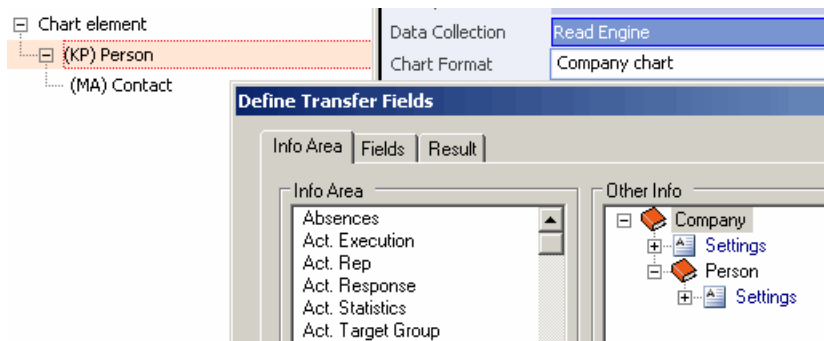
Example: All Persons in a Company with Activities

The following report can be generated from a company and displays all persons in the company and their activities.

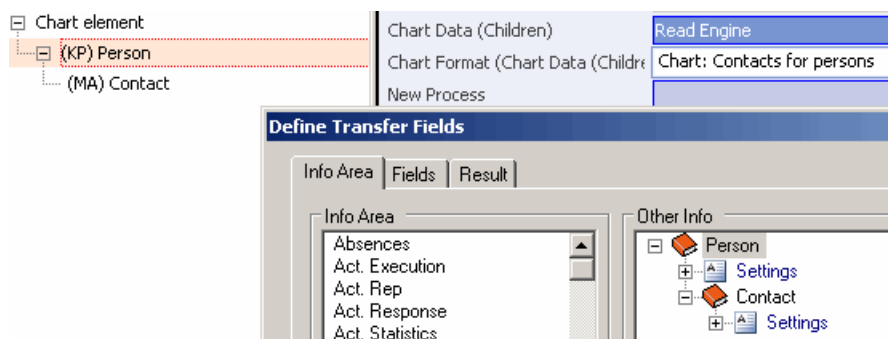
Chart element for persons, that generates nodes for all persons in the company:



The chart element for persons uses two transfer fields formats that define the structure of the data transferred to the chart:

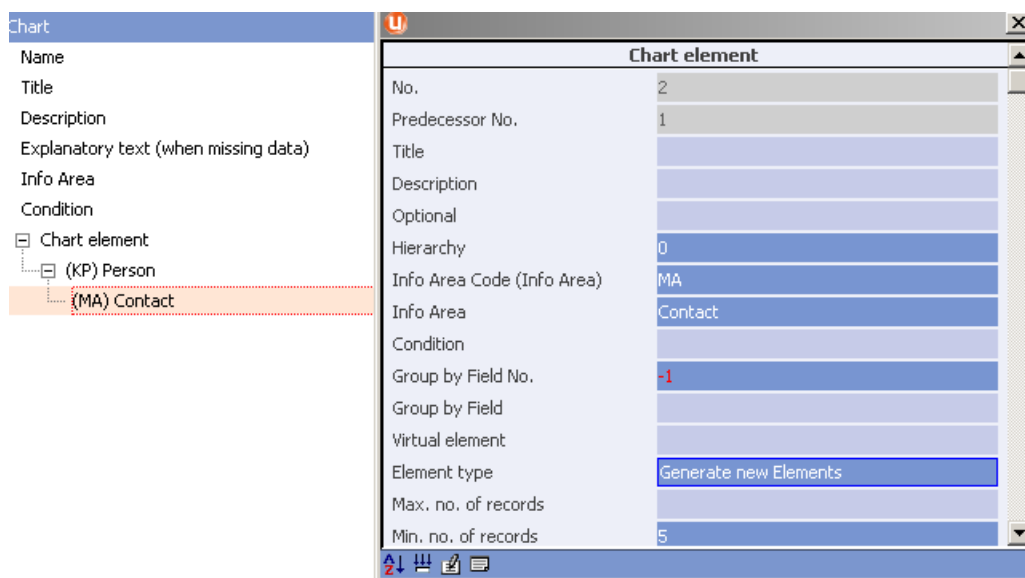


Use the **Fields** tab to determine the fields to be transferred for persons.



Use the **Fields** tab to determine the fields to be transferred for activities.

Chart elements for activities that generates nodes for all activities for a person:



The XML report contains all persons in the company and all their activities:

```

- <nodes>
- <node id="1" level="0">
- <tables>
- <table tableshort="KP" prefix="KP"
  recid="429496729601">
  <field fieldno="0" fid="0" catNo="0"
    catval="2">Ms.</field>
  <field fieldno="3" fid="3">Geraldine</field>
  <field fieldno="2" fid="2">Torger</field>
  </table>
</tables>
- <nodes>
- <node id="2" level="1">
- <tables>
- <table tableshort="MA" prefix="MA"
  recid="429496729603">
  <field fieldno="103" fid="103">New Feature
    Meeting</field>
  <field fieldno="2" fid="2">20101006</field>
  <field fieldno="3" fid="3">1747</field>
  </table>
</tables>
</node>
+ <node id="2" level="1">
+ <node id="2" level="1">
+ <node id="2" level="1">
+ <node id="2" level="1">
</nodes>
</node>
- <node id="1" level="0">
- <tables>
- <table tableshort="KP" prefix="KP"
  recid="429496729608">
  <field fieldno="0" fid="0" catNo="0"
    catval="1">Mr.</field>
  <field fieldno="3" fid="3">Klaus</field>
  <field fieldno="2" fid="2">Maier</field>
  </table>
</tables>
- <nodes>
- <node id="2" level="1">
- <tables>
- <table tableshort="MA" prefix="MA"
  recid="429496729607">
  <field fieldno="103" fid="103">Review
    Meeting</field>
  <field fieldno="2" fid="2">20110117</field>
  <field fieldno="3" fid="3">1425</field>

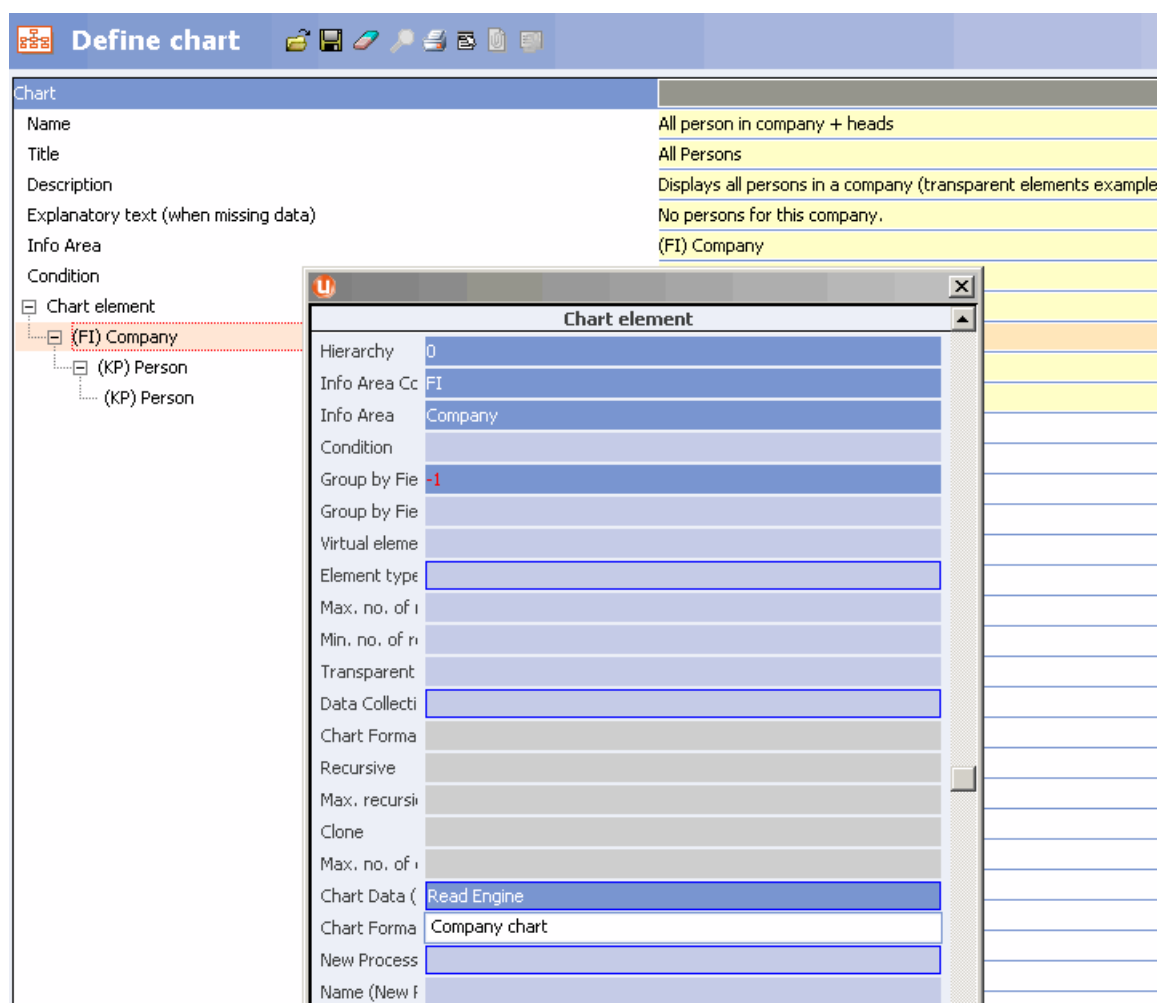
```

Example: All Persons in a Company with Department Heads

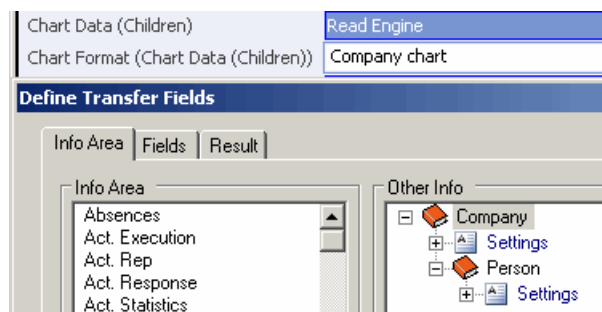
The reports in this topic can be generated from a company and displays all persons in the company.

Persons whose position is "Department head" are additionally displayed in a separate node. The **Transparent element** option is used to transfer data within the structure. Persons are additionally grouped according to the entry in the "Department" field.

Chart element for the company nodes:



Transfer fields format for companies and persons:



Use the **Fields** tab to determine the fields to be transferred for companies and persons.

Definition of the person node used for department heads: all employees (including the department head) are transferred to the next level (using the **Transparent element** option):

Chart element	
No.	3
Predecessor No.	2
Title	
Description	
Optional	
Hierarchy	0
Info Area Code (Info Area)	KP
Info Area	Person
Condition	
Group by Field No.	-1
Group by Field	
Virtual element	
Element type	
Max. no. of records	
Min. no. of records	
Transparent element	✓
Data Collection	

Condition for the department head: nodes are generated on this level for department heads:

Info Area: Person
 Condition: ✓

Define Search Conditions - Person

Search Condition: [Empty field]

Defined Conditions:

- Person
 - Position
 - Department head

Definition of the person node for employees in the departments: employees are grouped by department on this level (**Group by Field** option):

Chart element	
No.	1
Predecessor	3
Title	
Description	
Optional	
Hierarchy	0
Info Area Code	KP
Info Area	Person
Condition	
Group by Field No.	11
Group by Field	Division
Virtual element	
Element type	Generate new Elements
Max. no. of records	

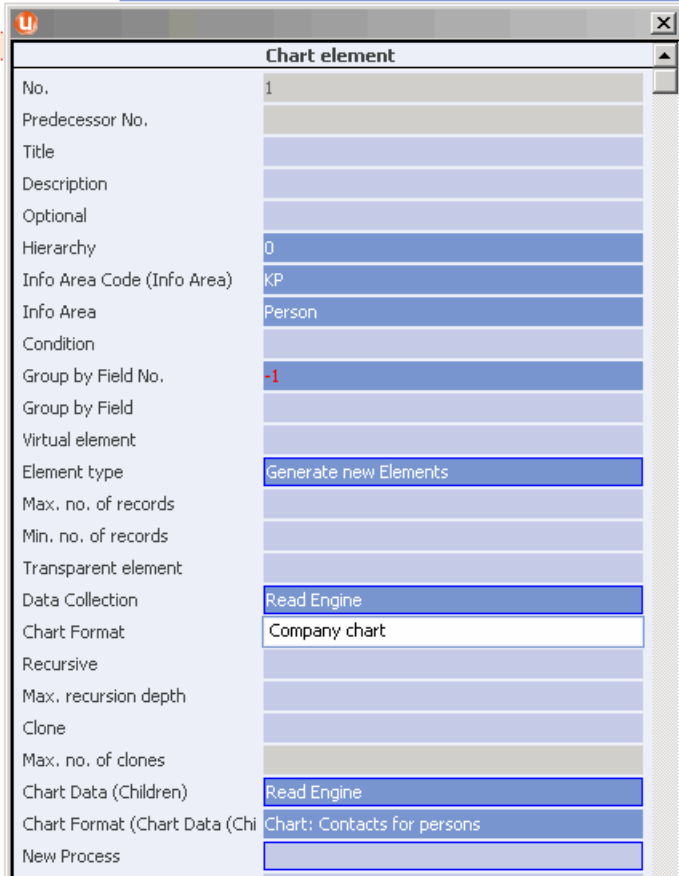
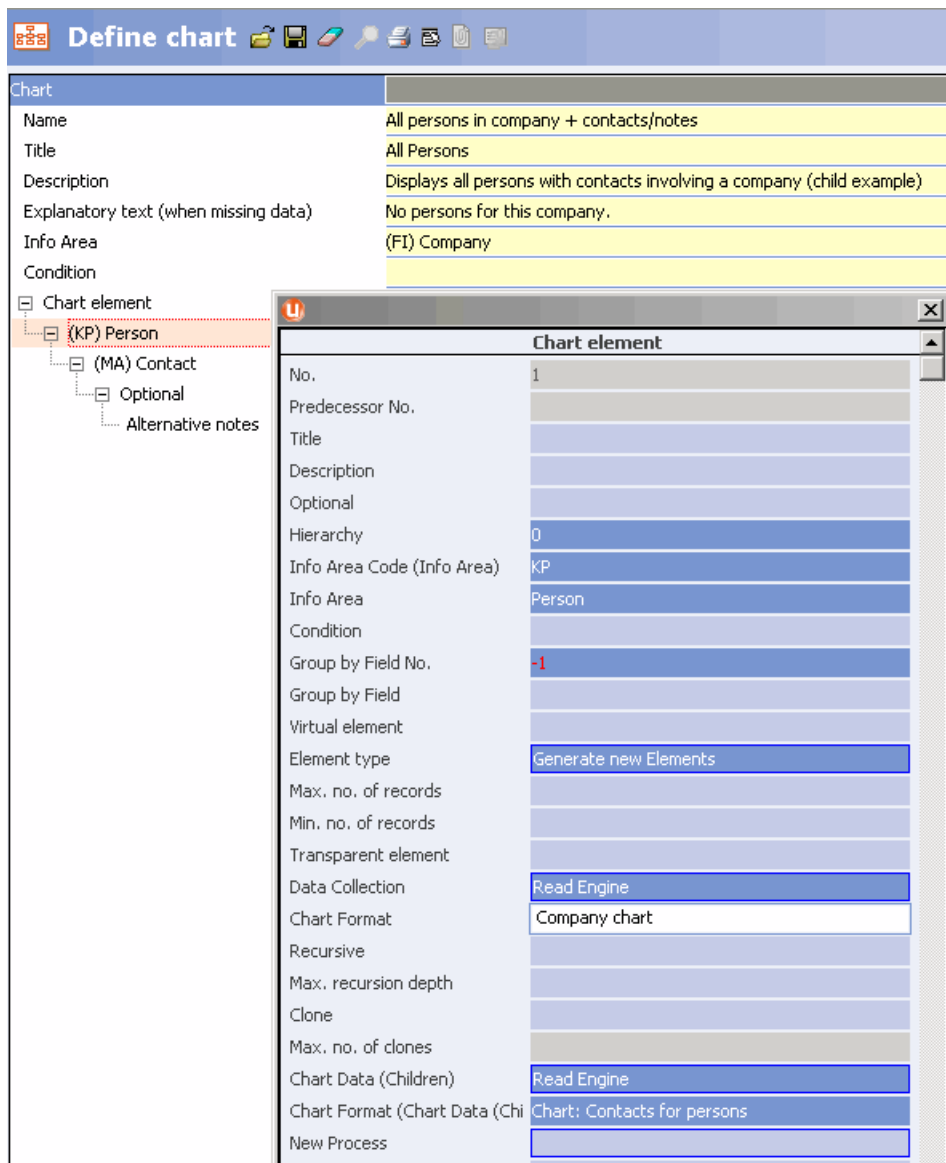
XML report: a department head is found and is displayed at the start. All employees are then grouped by department below the department head:

```
- <nodes>
- <node id="2" level="0">
  - <tables>
    <table tableshort="FI" prefix="" recid="429496729601" />
  </tables>
- <nodes>
- <node id="3" level="1">
  - <tables>
    - <table tableshort="KP" prefix="KP" recid="429496729608">
      <field fieldno="0" fid="0" catNo="0" catval="1">Mr.</field>
      <field fieldno="3" fid="3">Klaus</field>
      <field fieldno="2" fid="2">Maier</field>
    </table>
  </tables>
- <nodes>
- <node id="1" level="2">
  - <groupBy>
    <field fieldno="11" fid="11" catNo="6"
      catval="1">Marketing</field>
  </groupBy>
  - <tables>
    - <table tableshort="KP" prefix="KP" recid="429496729601">
      <field fieldno="0" fid="0" catNo="0"
        catval="2">Ms.</field>
      <field fieldno="3" fid="3">Geraldine</field>
      <field fieldno="2" fid="2">Torger</field>
    </table>
  </tables>
</node>
- <node id="1" level="2">
  - <groupBy>
    <field fieldno="11" fid="11" catNo="6" catval="4">Human
      Resources</field>
  </groupBy>
  - <tables>
    - <table tableshort="KP" prefix="KP" recid="429496729608">
      <field fieldno="0" fid="0" catNo="0"
        catval="1">Mr.</field>
      <field fieldno="3" fid="3">Klaus</field>
      <field fieldno="2" fid="2">Maier</field>
    </table>
    - <table tableshort="KP" prefix="KP" recid="429496729611">
      <field fieldno="0" fid="0" catNo="0"
        catval="1">Mr.</field>
      <field fieldno="3" fid="3">Isidor</field>
      <field fieldno="2" fid="2">Perger</field>
    </table>
  </tables>
</node>
```

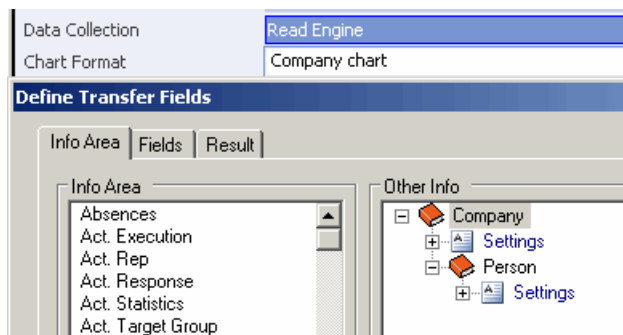
Example: All Persons in a Company with Activities or Notes

The report in this topic can be generated from companies and contains all persons and their activities.

If no activities are present for a person, notes are displayed instead (**Optional** setting).

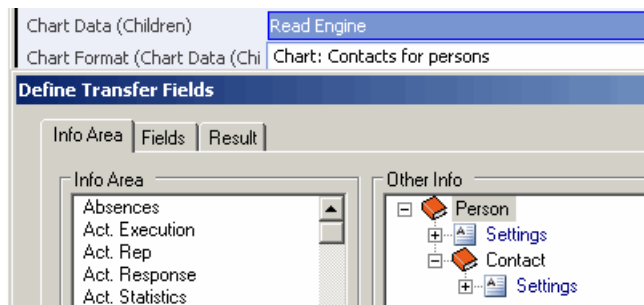


Transfer fields format for companies and persons:



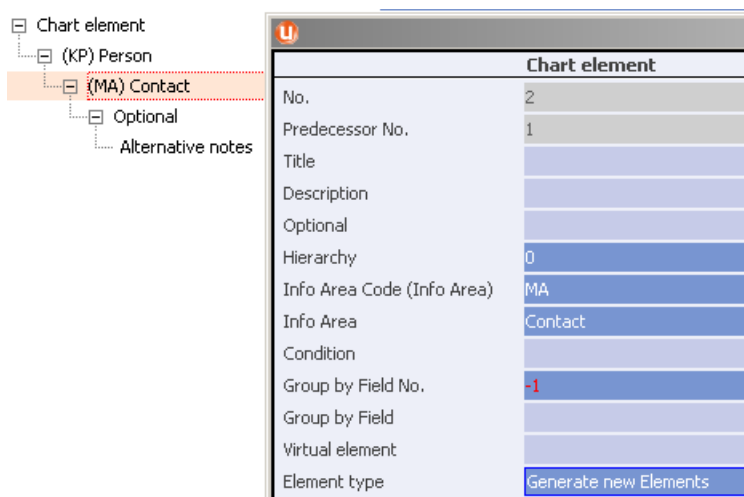
Use the **Fields** tab to determine the fields to be transferred for persons.

Transfer fields format for persons and activities:

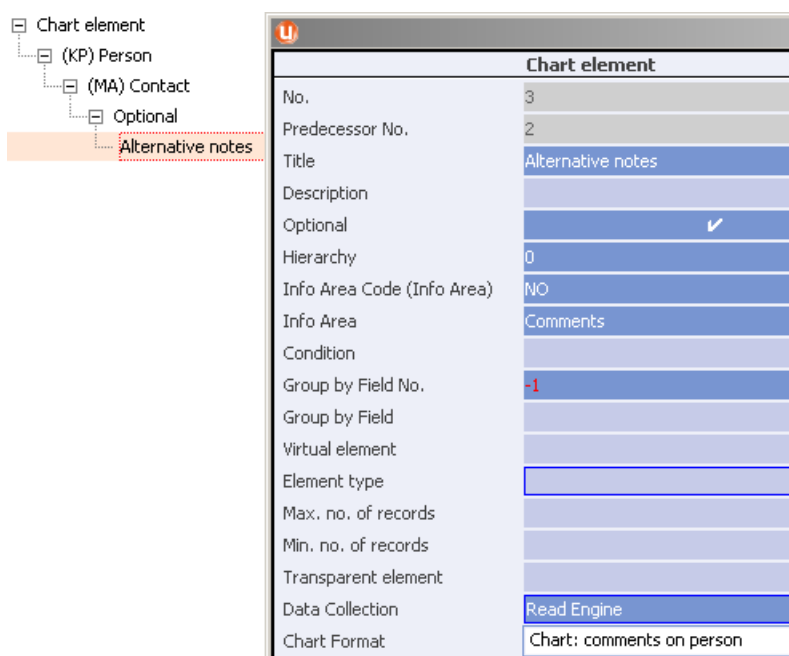


Use the **Fields** tab to determine the fields to be transferred for activities.

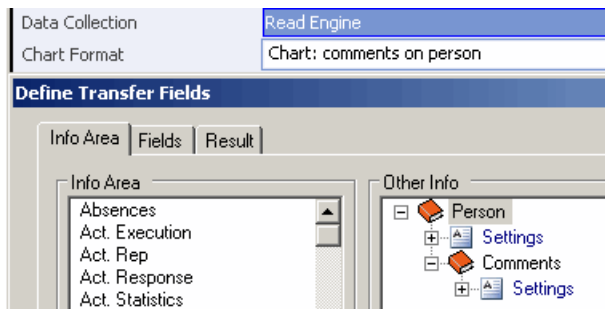
Chart element for activities:



Optional chart element for notes: if the parent node cannot be added (i.e. there are no activities), nodes are created for all notes instead:



Transfer fields format for notes:



Use the **Fields** tab to determine the fields to be transferred for notes.

The XML report contains all persons in the company and their activities:

```
- <nodes>
- <node id="1" level="0">
- <tables>
- <table tableshort="KP" prefix="KP"
  recid="429496729601">
  <field fieldno="0" fid="0" catNo="0"
    catval="2">Ms.</field>
  <field fieldno="3" fid="3">Geraldine</field>
  <field fieldno="2" fid="2">Torgor</field>
  </table>
</tables>
- <nodes>
- <node id="2" level="1">
- <tables>
- <table tableshort="MA" prefix="MA"
  recid="429496729603">
  <field fieldno="103" fid="103">New
    Feature Meeting</field>
  <field fieldno="2" fid="2">20101006</field>
  <field fieldno="3" fid="3">1747</field>
  </table>
</tables>
</node>
- <node id="2" level="1">
- <tables>
- <table tableshort="MA" prefix="MA"
  recid="429496729604">
  <field fieldno="103"
    fid="103">Postmortem</field>
  <field fieldno="2" fid="2">20101102</field>
  <field fieldno="3" fid="3">1815</field>
  </table>
</tables>
</node>
```

If no activities are present for a person, the notes are displayed:

```

- <node id="1" level="0">
- <tables>
- <table tableshort="KP" prefix="KP"
  recid="429496729613">
  <field fieldno="0" fid="0" catNo="0"
    catval="2">Ms.</field>
  <field fieldno="3" fid="3">Hermine</field>
  <field fieldno="2" fid="2">Käser</field>
  </table>
</tables>
- <nodes>
- <node id="3" level="1">
- <tables>
- <table tableshort="NO" prefix="NO"
  recid="429496729602">
  <field fieldno="49" fid="49">Super
    User</field>
  <field fieldno="7" fid="7">0</field>
  <field fieldno="15" fid="15" />
  </table>
</tables>
</node>

```

Example: Ticket Hierarchy

The report in this topic can be generated from a ticket and displays all tickets linked to the current ticket in the ticket hierarchy.

In the first step, the system searches recursively for the root ticket (**Recursive** option). In the second step, nodes are generated for all the root ticket's child tickets (**Clone** option). Relationships between tickets are established using indices.

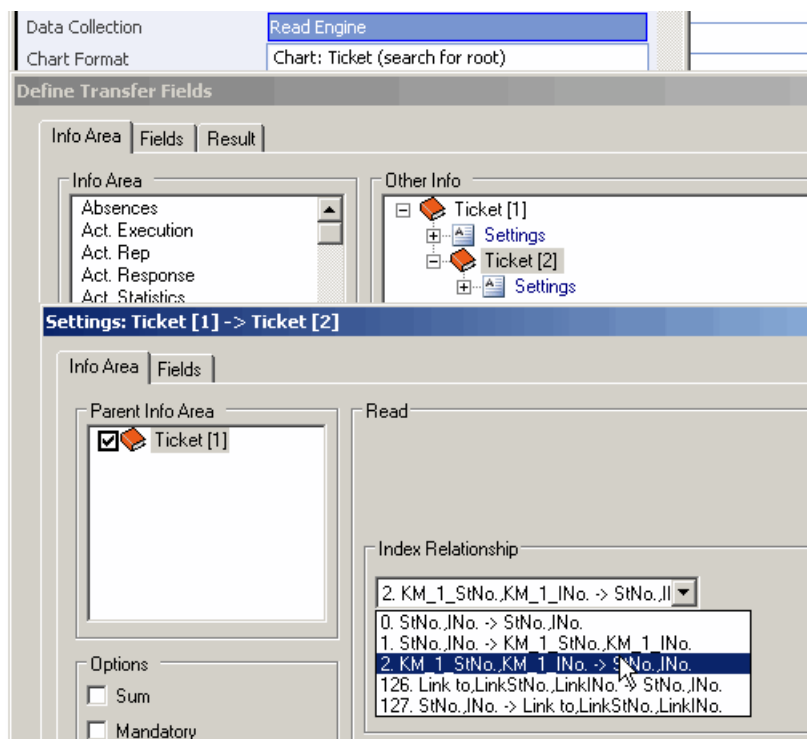
Chart elements used to search recursively for the top-most ticket in the ticket hierarchy (**Recursive** option):

Define chart

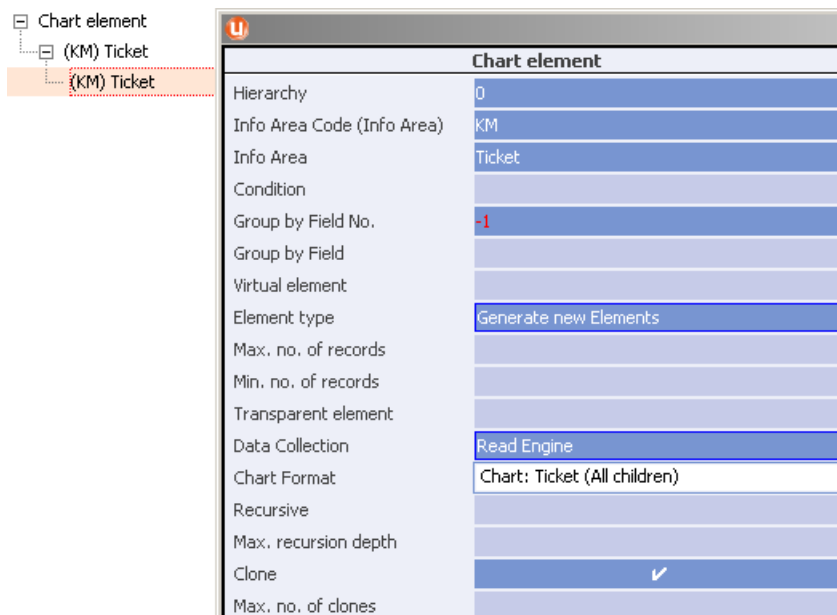
Chart	
Name	Ticket hierarchy
Title	All tickets
Description	Ticket hierarchy (recursive example)
Explanatory text (when missing data)	
Info Area	(KM) Ticket
Condition	
Chart element	
<ul style="list-style-type: none"> Chart element <ul style="list-style-type: none"> (KM) Ticket <ul style="list-style-type: none"> (KM) Ticket 	

Chart element	
No.	1
Predecessor No.	
Title	
Description	
Optional	
Hierarchy	0
Info Area Code (Info Area)	KM
Info Area	Ticket
Condition	
Group by Field No.	-1
Group by Field	
Virtual element	
Element type	
Max. no. of records	
Min. no. of records	
Transparent element	
Data Collection	Read Engine
Chart Format	Chart: Ticket (search for root)
Recursive	<input checked="" type="checkbox"/>

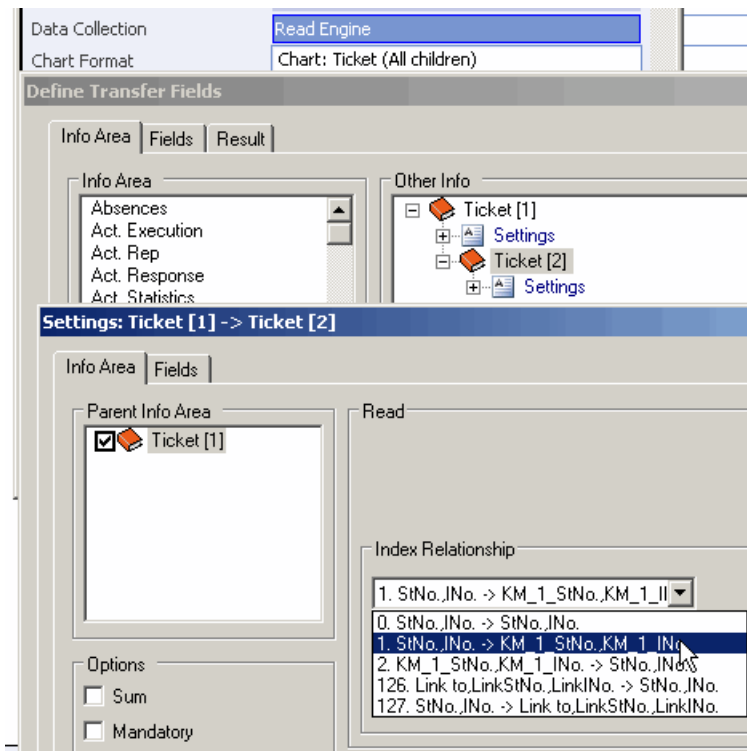
Transfer fields format for the root ticket: search upwards in the hierarchy using index 1:



Use the **Fields** tab to determine the fields to be transferred for the top-most ticket. Chart elements for child tickets: search recursively for all child tickets. A node is added for each ticket that is found (**Clone** option):



Transfer fields format for the child tickets: search using index 2:



Use the **Fields** tab to determine the fields to be transferred for the child tickets. The XML report contains the entire ticket hierarchy:

```

- <nodes>
- <node id="1" level="0">
- <tables>
- <table tableshort="KM" prefix="KMKM1" recid="429496729601">
  <field fieldno="25090" fid="90">Ticket Root</field>
  <field fieldno="4" fid="4" catNo="324" catval="0" />
  <field fieldno="5" fid="5" catNo="325" catval="0" />
  <field fieldno="50" fid="50">Italienischer Bearbeiter</field>
</table>
</tables>
- <nodes>
- <node id="2" level="1">
- <tables>
- <table tableshort="KM" prefix="KMKM1" recid="429496729602">
  <field fieldno="25090" fid="90">Sub Ticket 1</field>
  <field fieldno="4" fid="4" catNo="324" catval="1">Produkt</field>
  <field fieldno="5" fid="5" catNo="325" catval="2">web</field>
  <field fieldno="50" fid="50" />
</table>
</tables>
- <nodes>
- <node id="2" level="2">
- <tables>
- <table tableshort="KM" prefix="KMKM1" recid="429496729604">
  <field fieldno="25090" fid="90">Sub Sub Ticket 1</field>

```

6

Aurea CRM Commands and Parameters

Here is the list of Aurea CRM commands and parameters.

For information on the usage of command line parameters, see [Aurea CRM Parameters](#) in the *CRM.core Administrator Guide*.

mman.exe Parameters

-a

Executes the specified analysis:

```
mman.exe -u <User> -p <Password> -a "Revenue 2009"
```

-f

Loads the specified analysis format:

```
mman.exe -u <User> -p <Password> -f "Revenue 2009"
```

-s

Use this parameter to execute multiple analyses sequentially:

```
mman.exe -u <User> -p <Password> -s c:\windows\script.txt
```

Contents of the text file (ASCII, Unicode, UTF8):

```
-a "Revenue 2005"  
-a "Revenue 2006"  
-a "Revenue 2007"  
-a "Revenue 2008"
```

mmco.exe Parameters

-k

Starts the input or output of a communication file, see [Communication Steps](#) on page 120.

```
mmco.exe -u com -p <Password> -k I,101,102,1 -k o,101,102
```

The following options are available:

- **i**: Input communication file
- **o**: Output communication file
- **101,102 etc.**: Numbers of the stations to communicate with. If no station numbers are specified, communication takes place for all stations for which a communication connection exists, see [Defining Communication Connections](#).

You can also enter number ranges: `mmco.exe -u com -p <Password> -k o,10-1000` outputs communication files for stations 10 to 1000.

- **1**: Use this option to delete records marked as deleted automatically, without requiring the deletion to be confirmed manually, see [Communicating Deleted](#)

[Records](#) on page 137. The number of days entered in the **Delete Cycle in Days** field in the **Station** info area is taken into account when deleting records.

```
mmco.exe -u com -p <Password> -k i,l
```

- **u**: Output a data stock download, see [Data Stock Download](#) on page 117.

```
mmco.exe -u com -p <Password> -k o,101,u
```

Outputs a data stock download (-k o ,u) for station 101.

Use info area codes to output a data stock download for specific info areas, e.g.

u :FI:KP:MA, see [Partial Data Stock Download](#).

- **+**: Inputs a data stock download.

```
mmco.exe -u com -p <Password> -k i,l,+
```

Inputs the data stock download (-k i ,+) generated on the main office (1).

- **r**: Use this option to create a new data stock download for an existing station to reset the station, see [Outputting a new Data Stock Download for an Existing Station](#).

```
mmco.exe -u com -p <Password> -k o,101,r
```

Outputs a new data stock download for station 101.

- **w**: Use this option to output all catalog values. By default, only catalog values that have changed are output.

```
mmco.exe -u com -p <Password> -k o,101,w
```

Catalogs are output for station 101 (o ,101). All catalog values are output (w).

- **n**: Use this option to prevent catalog values that are added on a branch office from being input on the catalog maintenance station.

```
mmco.exe -u com -p <Password> -k i,101,n
```

Data is input from station 101 (i ,101). No catalog changes are input (n), i.e. catalog values added or edited on the branch office. Exception: If a new or edited catalog value is used in a record on the branch office and this record is also communicated. In this case, the catalog value is input.

- **m**: Use this option to execute an automatic communication process using a communication connection with the **Execution** set to "manual", see [Defining Communication Connections](#).

```
mmco.exe -u com -k ein,101,m
```

Data is input from station 101 (i ,101). The communication connection defined as "manual" is used (m). Change control and manual match-up options are ignored. Combine this parameter with the parameter **k** to determine that the change control and manual match-up dialogs should be displayed.

- **k**: Use this option to execute automatic communication with manual control.

```
mmco.exe -u com -k ein,101,m,k
```

Data is input from station 101 (i ,101). The communication connection defined as "manual" is used (m). Messages are output, changes can be verified manually and records can be matched up manually (k), see [Communication with Change Control](#) and [Communication with Manual Match-up](#).

-
- **q**: Use this option to suppress the license registration request. Use this option if you use the SU user for automatic communication. Otherwise the communication process is aborted.

```
mmco.exe -u com -p <Password> -k i,101,n
```

- **z**: By default, the delta is determined (time stamp comparison) by writing all data to a temporary file, which prevents further access to the database. However, this requires free disk space equivalent to the size of the database.

Use this option to minimize the memory required by the communication process: the delta is determined by querying the database and written directly to the communication file. When using the **z** parameter, the disk space requirements are lower, however this can negatively impact on the performance of the communication process.

```
mmco.exe -u com -p <Password> -k o,1,z
```

A branch office outputs data for the main office (**o**, **1**). The memory used by the communication process is minimized (**z**).

- **WriteRecTmp**: By default, records are output in a compressed format. Use this option to output records in an uncompressed format.

```
mmco.exe -u com -p <Password> -k o,101,WriteRecTmp
```

- **D3DontCheck**: Use this option to prevent the system from checking whether records entered in link fields are also output when outputting D3 links:

```
mmco.exe -u com -p <Password> -k o,101,D3DontCheck
```

- **b**: This option (benchmark) is only for test purposes.

-c

Starts an external application after the communication process:

```
mmco.exe -u com -p <Password> -k i,1 -k o -c x:\move_com_files.bat
```

Use the **-c** parameter a second time to specify a working directory for the application.

--oe

Use this parameter to suppress communication via e-mail, >> Communicating via E-mail on page 77. The input or output is started without the Mapi.dll file. This parameter takes precedence over the settings in the **Communication** info area.

For example, `mmco.exe -u com -u com -p <Password> -k o,101,u --oe` creates a data stock download for station 101. Communication does not take place via e-mail, irrespective of the settings entered in the communication connection.

-s

Use this parameter to execute multiple communication processes sequentially:

```
mmco.exe -u <User> -p <Password> -s c:\windows\script.txt
```

Contents of the text file (ASCII, Unicode, UTF8):

```
-k o,101,u  
-k o,102,u  
-k o,200,u
```

In this example, data stock downloads are created for multiple stations.

--DmMerge

Use this parameter to suppress the confirmation prompt when merging data models. The data models are merged, see [Merging Data Models](#) in the *CRM.core Administrator Guide*.

mmim.exe Parameters

Importing or exporting data using the command line requires:

- An import or export format, see [Defining an Import/Export format](#) on page 19.
- The external file containing the import data (at the location specified in the format), see [Import File/Import Database](#).

Check the log files immediately after each automatic import. The log files are overwritten by the next import.

-e

Starts the **Export** module. If this parameter is not used, the **Import** module is started.

-f

Specifies the import or export format:

```
mmim.exe -u <User> -p <Password> -f "Import Companies"
mmim.exe -e -u <User> -p <Password> -f "Export FI/KP"
```

-d

Path and name of the import or export file. Used instead of the file entered in the format.

```
mmim.exe -u <User> -p <Password> -f "Import Companies" -d
"c:\MyDocuments\companies_csv"
```

Note: Allowed max. length of path and name: 259 characters. If the string passed with `-d` exceeds this limit, `mmim.exe` is not started and a message is written to the log file.

-c

This parameter applies to export only. If the target export file exists, the file is not overwritten, but a new file is created. The files are numbered sequentially (*.0, *.1 etc.).

You can speed up the export process by selecting the **Upd** field in the **Sort By** field and starting the export with `-c`.

```
mmim.exe -e -u <User> -p <Password> -f "Export Companies" -c
```

-n YYYYMMDD

This parameter applies to export only. Records are only exported if they are entered on or after the specified date.

```
mmim.exe -e -u <User> -p <Password> -f "Export Companies" -c -n 20090815
```

-k

This parameter applies to import only. The import is executed using manual control, see [Executing the Import](#) on page 79.

```
mmim.exe -u <user> -p <Password> -f "Import Companies" -d c:\companies_csv -k
```

Note: The parameters `-d`, `-k`, `-n` and `-c` apply to the previous format specified with `-f`:

```
mmim.exe -e -u <User> -p <Password> -f "Export Companies" -n 20090815 \  
-d c:\fi0815.csv -f "Export Activities" -n 20090901 -d c:\ma0901_csv
```

--lkz

This parameter applies to export only. Records marked as deleted are also exported (**DeICd** field enabled).

```
mmim.exe -e -u <User> -p <Password> -f "Export Companies" --lkz
```

-s

Use this parameter to execute multiple imports or exports sequentially:

```
mmim.exe -u <User> -p <Password> -s c:\windows\script.txt
```

Contents of the text file (ASCII, Unicode, UTF8):

```
-f IMP_FIKP  
-f IMP_AK  
-f "Import Activities"
```

If an error occurs during batch import, `mmim.exe` returns the following error codes:

525	Format not found
526	Format could not be loaded / format defect
502	No access to source file
504	No connection to source table or field(s) in the source table wrong
510	SQL error

--abortOnError

To cancel a batch import as soon as one of the imported files causes an error, use `-- abortOnError` together with `-s`.

--sqlwhere

Use this parameter to restrict the imported data using an SQL WHERE clause (in double quotes). This parameter can be used in conjunction with the following parameters:

- `-f`
- `-s`

If the **Import table** option is not enabled for the format specified the parameter is ignored and a message is written to the log file.

When using `-- sqlwhere` together with packet size, you need to specify the packet size in the command line as well.

```
mmim.exe -u <User> -p <Password> -f "Import Companies" --sqlwhere "WHERE PLZ=1040  
/*packetSize=1000*/"
```

--transactional

Use this parameter to use transactions: Each row is imported within a database transaction. If one of the records in a row contains incorrect data, the entire row is rolled back, e.g. if the import of an offer for a company fails, the related company is not imported as well.

If user input is required during the import of a record, the transaction is aborted.

Note: When importing with transactions the **Package processing** option is not supported, see [Info area properties](#) on page 47.
