Crm Customer Relationship Management

CRM Win User Manual

Version 14.1

Aurea

Unlimited Possibility

Notices

You are hereby placed on notice that the software, its related technology and services may be covered by one or more United States (“US”) and non-US patents. A listing that associates patented and patent-pending products included in the software, software updates, their related technology and services with one or more patent numbers is available for you and the general public’s access at https://markings.ip-dynamics.ai/esw/ (the “Patent Notice”) without charge. The association of products-to-patent numbers at the Patent Notice may not be an exclusive listing of associations, and other unlisted patents or pending patents may also be associated with the products. Likewise, the patents or pending patents may also be associated with unlisted products. You agree to regularly review the products-to-patent number(s) association at the Patent Notice to check for updates.

Table of Contents

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.
Italic Fixed-width	*Italic Fixed-width* 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.
Italic serif	In text, *italic serif* 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`-LOGFILE` parameter in a command, you only need to enter `-LOGF`.
[ ]	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 athttps://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 Users.

What is Aurea.CRM?

Aurea.CRM is the CRM Suite from Aurea.

CRM (Customer Relationship Management) is a strategic decision by your enterprise to tailor your business processes to meet the needs of your clients. Aurea.CRM is a comprehensive and flexible CRM software solution. It is optimally suited to your enterprise if you desire short project durations, sector-specific business processes and modern system architecture paired with tried and tested functionality.

Our business solutions cater to the demands of businesses of all sizes, providing services to both small departments and multinational corporations. All marketing, sales and service processes are depicted in the system, helping you provide your clients with comprehensive CRM – from the initial contact with a client to offering optimal support and targeted services.

Aurea.CRM win is the windows client in the Aurea.CRM product suite. It can be implemented without any programming knowledge and configured to meet your internal processes. This, in turn, improves your planning options, accelerates implementation and helps you recoup your Return on Investment quickly.

Documentation

Content of Aurea CRM Win User Manual.

This manual includes information on Aurea.CRM win's essentials functions:

- Starting and **logging on** to Aurea.CRM win.
- Components in the Aurea.CRM win **user interface** (menus, masks, lists, field types) and using and configuring them.
- **Basic functions**, such as adding new records, searching, sorting, printing. These functions are similar across many info areas.
- Appointment management in the **calendar, daily overview**, and resource view.
- Carrying out automatic **marketing activities** and **campaigns** (e.g. e-mail distribution).
- Carrying out **surveys.**

- **Document management** for general and customer documents.
- Using Aurea.CRM win with **third-party software**, such as your word processor or e-mail client.
- Creating **selections** used to generate target groups from the database.
- Displaying **analyses**, **timelines** and **reports** that provide you with an overview of your activities.

Information on the vertical-specific **business logic** can be found in the vertical-specific manuals (Business Logic BTB, FS and OTC) available from https://support.aurea.com.

Information for **system administrators** can be found in the Aurea.CRM win Administrator Guide and the CRM.core Administrator Guide.

If your administrator has copied the **PDF files** to the **\Manuals** directory of your Aurea.CRM installation, you can open the Aurea.CRM win documentation by selecting **Help** > **Manual** from the menu.

If your version of Aurea.CRM win includes context-sensitive **field help**; you can obtain information on individual fields in the database:

- Press F1 when in a field to display the field help for that field.
- Press Ctrl+F1 to display the field help for the first info area in the first info area in the current level. Click on the links to view the field help for individual fields. Use Alt+Left to return to the index.

This manual describes the standard functions included with Aurea.CRM win. The product can be configured to meet your requirements; Aurea or your system administrator can change the appearance of data in masks or change Aurea.CRM win's behavior using workflows and triggers. You may therefore experience some deviation from the masks and functions described in this manual in your installation of Aurea.CRM win.

Typographical Conventions

Learn how to use this document.

The following formatting is used in this manual:

- Gray and bold: Menu commands, menu names, titles of dialog boxes, check boxes, radio buttons, info area names, names of fields and buttons are written **like this**.
- Menu commands: "Select **View** > **All Mask Fields** from the menu" means that you should select **All Mask Fields** from the **View** menu.
- Bold: Particularly important information is written in **bold.**

- Keyboard shortcuts: Simultaneous key strikes are identified by placing a plus sign between the key designations, e.g. Alt+D.
- Notes and tips:

Note: Notes and tips are displayed like this in the text.

Database Structure

Aurea.CRM's **database** contains various **info areas** that represent **records** of various types.

Each record contains a number of **fields** that are displayed and edited in a mask or list.

The data in the database is displayed in **levels**. A level can contain one or more info areas and associated functions; for example, the **Company+Person** level includes both the independent **Company** info area containing company data and the related (virtual) **Person** info area containing data on contawct persons. Persons not linked to a company or assigned to multiple companies are available in the **Person** info area, see Customer Data on page 11.

Customer Data

Data such as the company name, address, telephone and fax numbers of your clients and potential clients are stored in the **Company** info area.

You can store information on persons in the following info areas:

- The **Person** info area is used to store the actual data concerning persons, e.g. their name, date of birth, private address etc.

Use the **Person** info area to store private bank customers, or doctors that have both a practice and are also employed at a clinic, for example.

- The **Contact Person** info area is used to store person data related to companies, e.g. department, position, telephone extension etc.
- The **Person in Company** info area displays all person data in the context of a specific company by combining information in the **Person** and **Contact Person** info areas.

For more information, see Managing Companies and Persons on page 125 and **Managing Companies and Persons** in the CRM.core Administrator Guide.

Data in Child Info Areas

A wide range of additional information can be stored for companies/persons in **child (dependent) info areas**.

If you are viewing a company or person and switch to a child info area, you can edit and display the records linked to the company or person. For example, switching to the **Activity** info area from a company record would display the activity records added for the company.

These additional records are always linked to a company and/or person. Child records are displayed in **child levels** for the company/person. Select **Person-Related Info**, **Company-Related Info** or **Both** from the **Data** menu to determine whether records in a child info area should be displayed for the parent person, company or both.

Data in Independent Info Areas

Independent info areas (e.g. **Marketing Activity**, **Item Master** or **Campaign**) are used to store general information that is not hierarchically below any other info area in the database.

However, the data in these info areas can still be associated with other info areas.

For example, campaigns are independent, rather than stored for a specific person or company. Nonetheless, you can assign persons to campaigns as part of the campaign's target group.

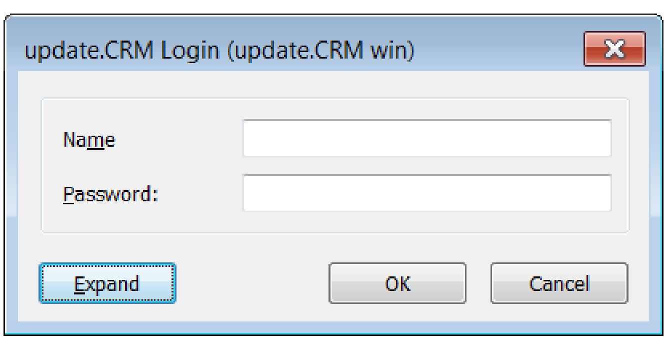
Logging on to Aurea.CRM win

Starting Aurea.CRM win

Learn how to start and exit CRM.win.

To start Aurea.CRM win:

1. Double-click the **Aurea.CRM** icon .



Note: If you receive a message concerning your license, please contact your administrator for further help.

2. The default language when you start Aurea.CRM win is German. To change the language, click on **Erweitern** and select the language you want to work in from the drop-down list. You can also set the default language for Aurea.CRM win to English creating a shortcut and starting the application with "**mmba.exe -l:1**".

   Note: Your administrator may already have configured your shortcut to start Aurea.CRM win in a specific language.

   Once you make this selection the **Login** dialog box and all other screens and labels in Aurea.CRM win are in the language you chose if that language is available. Only English and German are distributed with every version of Aurea.CRM win. Additional languages are available from Aurea.

   To set English as the default language on start up, see Setting the Default Language to English on page 15.

3. Enter your user name and password.

   These should have been provided by your administrator.

4. Click **OK**.

Note: The user name is automatically converted to upper case in order to avoid errors. You must pay particular attention to special characters, however.

Exiting Aurea.CRM win

To exit Aurea.CRM win, do any of the following:

- Select **File** > **Exit** from the menu.
- Double-click the little Aurea.CRM icon in the top left-hand corner of the window.
- Click the close button at the top right of the window.
- Press ALT+F4.

Changing Your Password

Learn to change your password on CRM.win.

If you want to change your password, you can do so when you log on to Aurea.CRM win.

1. Start Aurea.CRM win.
2. Enter your user name and current password.

3. Click on **Expand**.
4. Activate the **Change Password** check box.
5. Click **OK**. The **Change Password** dialog box opens.
6. Enter a new password and click **OK**.
7. Enter the password a second time and click **OK**.

If the passwords you enter in steps 6 and 7 are not identical, your password is not changed and a corresponding message is displayed.

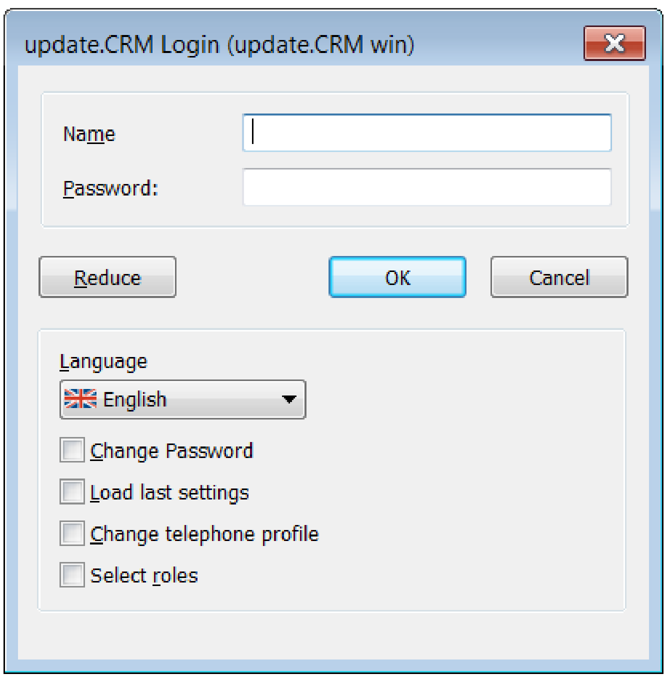
If you entered the same password twice, Aurea.CRM win opens.

Note: Your administrator can determine that passwords must be changed on a regular basis, as well as other password restrictions, such as whether the password may contain your user name, or whether it must contain certain types of characters or be of a certain length, see Password Security in the *CRM.core Administrator Guide*.

Expanded Settings

Learn how to choose language, change password and choose roles before login.

1. Click on the **Expand** button in the login window.



2. If several languages are configured on the current station, you can select the language you wish to work in from the **Language** drop-down list.
3. Enable the **Load last settings** check box in the expanded **Login** dialog box to access the settings you specified during your last session (open windows, loaded

selections, etc.). Leave **Load Last Settings** disabled to use the original settings when you next access Aurea.CRM win.

Note: This setting has no effect if start levels have been defined.

4. Enable the **Change telephone profile** check box if you wish to switch between telephone profiles.
5. Enable the **Select roles** check box to select one or more of the predefined roles available to you.

Setting the Default Language to English

Aurea.CRM win normally starts with German as the default language.

You can configure Aurea.CRM win to start with English as the default language.

1. Create a shortcut for Aurea.CRM win on your desktop.For instructions on creating a shortcut consult your Windows documentation. You may want to consider consulting your administrator about the location of the Aurea.CRM win executable file.
2. Right-click the shortcut. This opens a popup menu.
3. Select **Properties**.This opens the **Shortcut to mmba.exe Properties** dialog box.
4. Click the **Shortcut** tab.
5. Add "-L:1" to the end of the target string.

   The whole target string would then read as follows:

   ```
   ...\MM\SYSTEM\EXE\MMBA.exe -L:1
   ```

   Note: Depending on your version of Aurea.CRM win, the exact name of the executable (**mmba.exe**) may vary. In addition, the path to the file (**..\MM\SYSTEM\EXE**) may vary depending how the Aurea.CRM win is installed. Consult your administrator if you need help.

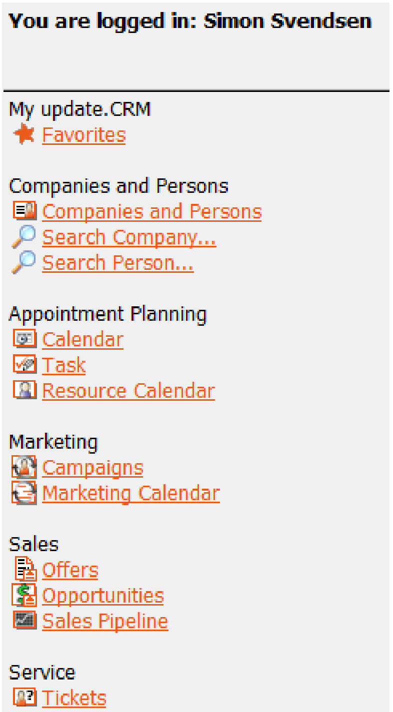
6. Click **OK**.

   The next time you start Aurea.CRM win the **Login** dialog box opens in English.

Start Page

The start page is displayed once you start Aurea.CRM win.

From here, you can access a variety of options.



Click on a hyperlink to access the associated level, document, web page or search.

A default start page is provided with Aurea.CRM win. However, your administrator can configure your start page for you and include levels, workflows, dashboards, documents and links to web pages, see Desktop in the *Aurea.CRM win Administrator Guide*.

If you access documents or web pages from the start page, the start page remains open. If you click on a link to a level or search, the start page is closed.

You can also access the available links from the context menu by right-clicking on the start page.

Keyboard Shortcuts

Aurea CRM win keyboard shortcuts.

Shortcuts for Masks and Lists

Keys	View	Mode	Action
Cursor Keys:			
Up	Mask, List	View	Next record up
	Mask	Edit	Previous field unless it is an edit field with several lines or a list field
	List	Edit	Previous line
Down	Mask, List	View	Next record down
	Mask	Edit	Next field unless it is an edit field with several lines or a list field
	List	Edit	Next line
Left	Mask, List	View	Previous record in parent level
	Mask, List	Edit	Previous character in edit field
Right	Mask, List	View	Next record in parent level
	Mask, List	Edit	Next character in edit field
Shift+Up	Mask, List	View	Next record up
	Mask	Edit	Highlights previous field in edit field with several lines
	List	Edit	Previous line
Shift+Down	Mask, List	View	Next record down
	Mask	Edit	Highlights next field in edit field with several lines

Keys	View	Mode	Action
	List	Edit	Next line
Shift+Left	Mask, List	Edit	Highlights previous character in edit field
Shift+Right	Mask, List	Edit	Highlights next character in edit field
Ctrl+Left	Mask, list with horizontal scrollbar	View	Scrolls window contents to left
Ctrl+Right	Mask, list with horizontal scrollbar	View	Scrolls window contents to right
Ctrl+Up	Mask, list with vertical scrollbar	View	Scrolls window contents up
	Mask	Edit	Previous record
	List	Edit	Previous record or line
Ctrl+Down	Mask, list with vertical scrollbar	View	Scrolls window contents down
	Mask	Edit	Next record
	List	Edit	Previous record or next line
Ctrl+Shift+Left	Mask, list with horizontal scrollbar	Edit	Scrolls window contents to left
Ctrl+Shift+Right	Mask, list with horizontal scrollbar	Edit	Scrolls window contents to right
Ctrl+Shift+Up	Mask with vertical scrollbar	Edit	Scrolls window contents up
Ctrl+Shift+Down	Mask with vertical scrollbar	Edit	Scrolls window contents down

Keys	View	Mode	Action
Alt+Down	Focus in edit field with Help button	Edit	Same effect as double-clicking in the edit field or clicking on the Help button
Tabulator:			
TAB	Mask, List	Edit	Next field
Shift+TAB	Mask, List	Edit	Previous field
Page Up, Page Down:			
Page Up	List	View, edit	Scrolls one page up
Page Down	List	View, edit	Scrolls one page down
Ctrl+Page Up	Mask with vertical scrollbar	View	Scrolls window contents up one page
	List	View, edit	Scrolls one page up
Ctrl+Page Down	Mask with vertical scrollbar	View	Scrolls window contents down one page
	List	View, edit	Scrolls one page down
Ctrl+Shift+Page Up	Mask with vertical scrollbar	Edit	Scrolls window contents up one page
Ctrl+Shift+Page Down	Mask with vertical scrollbar	Edit	Scrolls window contents down one page
Other			
Enter	Mask, List	Edit	Next field when not in an edit field with several lines

Keys	View	Mode	Action
Esc			Cancel button in the command bar
F6	Custom mask	View, edit	Toggles between blocks (e.g. switches between company and person in custom mask, View > Custom Mask)

Shortcuts for Tables

Keys	View	Mode	Action
Cursor Keys:			
Up		Edit	One line up
	Current line is first line in table	Edit	Focus in last field in mask which can be edited
Down		Edit	One line down
	Current line is last line in table	Edit	Focus in first field in mask which can be edited
Left	Focus on edit field in table	Edit	Previous character in edit field
	Focus not on edit field in table	Edit	Previous field in table
Right	Focus on edit field in table	Edit	Next character in edit field
	Focus not on edit field in table	Edit	Next field in line
Ctrl+Left	Horizontal scrollbar present	Edit	Scrolls table contents one column to left
Ctrl+Right	Horizontal scrollbar present	Edit	Scrolls table contents one column to right
Ctrl+Up	Vertical scrollbar present	Edit	Scrolls table contents one line up
Ctrl+Down	Vertical scrollbar present	Edit	Scrolls table contents one line down
Ctrl+Shift+Left	Horizontal scrollbar present and focus in edit field	Edit	Scrolls table contents one column to left
Cursor Keys:			

Keys	View	Mode	Action
Ctrl+Shift+Right	Horizontal scrollbar present and focus in edit field	Edit	Scrolls table contents one column to right
Ctrl+Shift+Up	Vertical scrollbar present and focus in edit field	Edit	Scrolls table contents one line up
Ctrl+Shift+Down	Vertical scrollbar present and focus in edit field		Scrolls table contents one line down
Tabulator:			
TAB		Edit	Next field which can be edited in line
Shift+TAB		Edit	Previous field which can be edited in line
Page up, Page down:			
Ctrl+Page Up	Vertical scrollbar present	Edit	Scrolls table contents one page up
Ctrl+Page Down	Vertical scrollbar present	Edit	Scrolls table contents one page down
Enter	Field is a check box	Edit	Toggles the field
	Field is neither an edit field nor a check box	Edit	Same as clicking with the mouse
Other			
Space	Field is a check box	Edit	Toggles the field
F6		Edit	Switches between mask and list view

Blocks with tabs on upper, lower or left hand edge

Key	View	Mode	Action
Cursor Keys:			
Alt+Up	Focus on tab on upper, lower or left hand edge	View, edit	Displays previous block or, if focus is on first block, last block
Alt+Down	Focus on tab on upper, lower or left hand edge	View, edit	Displays next block or, if focus is on last block, first block
Alt+Left	Focus on tab on upper or lower edge	View, edit	Displays previous block or, if focus is on first block, last block
Alt+Right	Focus on tab on upper or lower edge	View, edit	Displays next block or, if focus is on last block, first block
Tabulator:			
TAB	Focus on tab on upper or left hand edge	View	Displays next block or, if focus is on last block, first block
Shift+TAB	Focus on tab on upper or left hand edge	View	Displays previous block or, if focus is on first block, last block
Hotkeys:			
Alt+Letter		View, edit	Displays the corresponding block In edit mode, the focus is set to the first field in the block

Other Keyboard Shortcuts

Key	View	Mode	Action
F2	Integrated view		Switches to the next level
Shift+F2	Integrated view		Switches to the previous level
Ctrl+Shift+Letter			Shortcuts for the icon bar
F3			Toggles between integrated view and separate window
F4	Integrated level		Closes current level
Ctrl+Tab			Switches between windows open in Aurea.CRM
Alt+Ctrl+Letter			Button in the mask, entry in the context menu
Ctrl+Insert		View	Mark button in command bar
F6	Mask with analysis window		Toggles between analysis and mask
F11	CRM.phone is installed		Accept call
F12	CRM.phone is installed		End call
Shift+Alt+Home			Focus on the first button in the mask
Alt+Left			Same as clicking on the Back button in the general toolbar
Alt+Right			Same as clicking on the Forward button in the general toolbar

Key	View	Mode	Action
Application Key			Opens the context menu in the mask/list
Ctrl+ApplicationKey			Opens the context menu in the command bar (for the current level)
Ctrl+Shift+Application Key			Opens the icon bar's popup menu
Ctrl+Alt+Application Key			Opens the general toolbar's popup menu
Ctrl+Letter			Command bar shortcut (for the current level)
F5			Refresh, same as clicking the Refresh button in the general toolbar
Alt+Insert			New, same as clicking on the New button in the general toolbar
F7			Collapse/expand header
Ctrl+Enter			Adds a line break when defining reference texts.

2

Basic Functions

Know about the basic functions you can perform in Aurea CRM.win.

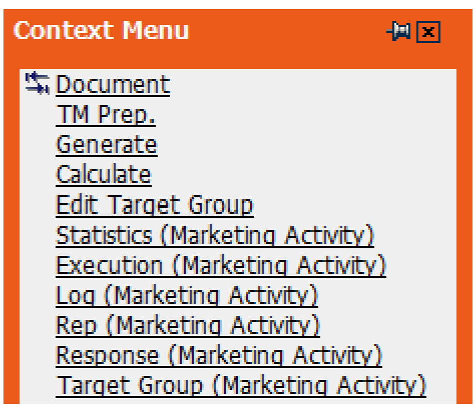
Displaying Records

Learn how to display records in Aurea CRM.win

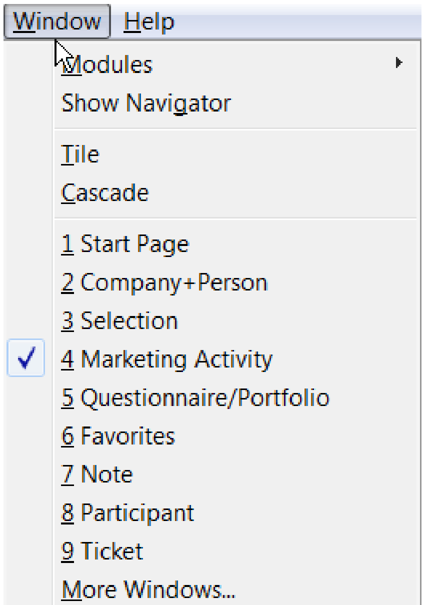
You can display records using the following methods:

- Select the corresponding info area from the **Info** menu, and use the navigation arrows (and) to navigate to the desired record.
- Select the corresponding info area from the **Info** menu, and use the **Find** buttons (or) in the header to search for a record, see Searching on page 43.

In many info areas, you can access dependent records using the context menu, see Accessing the Context Menu.



Select an independent info area from the **Window** menu to switch between open views.



- In the **Company+Person** level, you can choose which part (**Company** or **Person in Company**) of the mask to display by selecting **View** > **Mask Area** from the menu. By default, both options are enabled; i.e. both company and person data is displayed.
- Select **Data** > **Person-Related Info** or **Data** > **Company-Related Info** from the menu to limit the display to either company-related or person-related records.

Note: If you add data to a company for which no person is stored, the **Company-Related Info** and **Person-Related Info** options have no effect. In this case the record is always added for the company and all dependent records are displayed.

Tree View

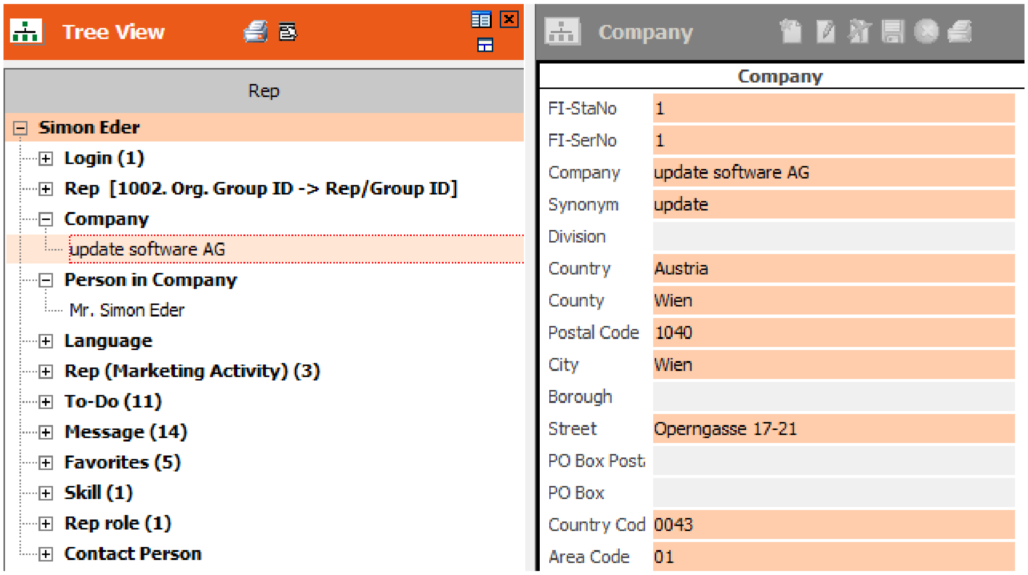
The tree view allows you to depict the hierarchic relationships between records by displaying parent and child records.

The tree view can be configured for all info areas by your administrator, see Tree View Tab in the Aurea.CRM win Administrator Guide.

To display records in the tree view:

1. Switch to the desired record.
2. Select the context menu or click on the button defined by your administrator. (Select **Data > Tree View** to display the tree view in the **Rights, Maintenance** and **Communication** modules.)

   The **Tree View** level is opened.



The current record is displayed as the root node. Info areas containing records linked to the current records are grouped according to the links.

3. Move the mouse cursor over an info area node to display a tooltip containing the number of records, details on the link (type and index), active conditions and sort order.

   The tree view is updated accordingly if you navigate within the parent level.

4. The following context menu options are available:

   - **Mask:** A mask is displayed to the right of the tree view. Click on a record in the tree view to display and edit the record's details in the mask.
   - **Lists:** A list is displayed to the right of the tree view. Click on an info area in the tree view to list and edit the corresponding records.

     Note: This option is only active if your administrator has defined a list. This option is always inactive for 1:1 links.

   - Display dependent records: Click on a record or info area and select this option to display all records dependent on the selected record or the records in the selected info area (as further nodes in the tree). Alternatively, double-click on an entry in the tree.
   - Load all records: If the number of records displayed in the tree view has been restricted in the desktop settings, the number of records in the info area is displayed with a plus sign (e.g. "5+"). Select this option to load all remaining dependent records.
   - Continue loading: Continues loading records if you canceled loading.
   - Retain current record: If you select this option, the tree view is not updated when navigating in the parent level in the summary index card.

- Add current record: If Retain current record is enabled, you can navigate to other parent records while retaining the tree view. Select this option to add the current parent record to the tree view as a further root node.
- Load record: The selected record is loaded in a new level.

Note: This option is only available in the main Aurea.CRM win module.

If no default level can be found, your administrator needs to define a target level, see Reference Tab in the *Aurea.CRM win Administrator Guide*.

- Display info area abbreviations: Displays the info area abbreviation in addition to the name.
- Sort links alphabetically: Sorts info area nodes alphabetically.
- Display links without records: By default, only those info areas are displayed in the tree that contain records linked to the root record. Select this option to list all info areas in the tree.
- Expand all/Collapse all: Expands or contracts all branches in the tree below the current node.

5. You can add, edit and delete records in the mask or list to the right of the tree view.

If your administrator has configured the tree view accordingly, you can move records from one node to another (e.g. move an activity from one person to another), as well as merge companies and persons, see Managing Companies and Persons on page 125.

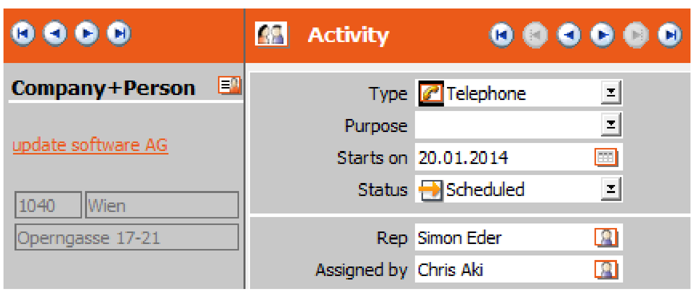
Navigation

The arrows in the command bar allow you to browse through the records in the current info area.

For example - arrows in the command bar is used to browse between activities added for a person.

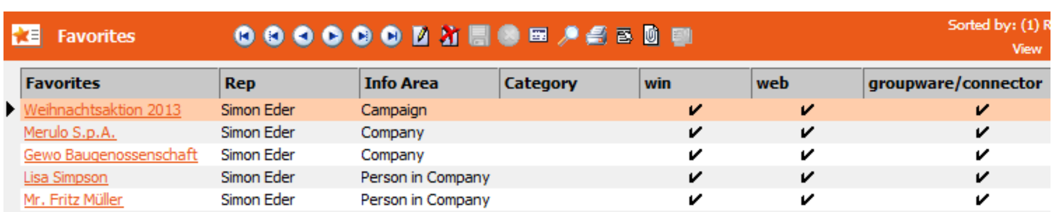
	**Previous record/Next record** These buttons navigate from one record to the next. Hold down the button to browse continuously.
	**Previous page/Next page** These buttons are only active in list view. Use them to scroll the list by one screen page.
	**First record/Last record** These buttons jump to the first or last record in the current view.

The navigation bar in the summary index card is only present when in a dependent info area, e.g. **Activity**. Use the summary index card to navigate between parent records. When switching between parent records, the first record in the child info area is displayed, e.g. the first activity record for the parent company/person.



Favorites

Use your favorites to store records you access frequently.



Adding Records to Your Favorites

To add a record to your list of favorites:

1. Switch to the desired record.
2. Select **Add to Favorites** from the context menu.

The record is added to your favorites and is displayed in the **Favorites** info area.

Note: By default, you can add records from the **Company**, **Person in Company** and **Campaign** info areas to your favorites, as well as **Property** and **Opportunity** records in the BTB vertical. Your administrator can activate this function for other info areas, see Context Menu Tab in the Desktop topic in the *Aurea.CRM win Administrator Guide*.

Displaying and Editing Favorites

To display your favorites:

- Select **Info > Favorites** from the menu.

Click on **Favorites** in the icon bar.

- Use the Ctrl + Shift + F shortcut.

Switch to list view to display all favorites.

Note: If you have administrator privileges, you can view the favorites added for a specific rep by switching to the rep in the **Rep** info area and selecting **Favorites** from the context menu.

Columns in the Favorites list

Favorites	Click on a hyperlink in this column to switch to the corresponding record.
Rep	Displays the name of the rep to which this favorite is assigned.
Info Area	The type of favorite (e.g. **Person in Company**).
Category	Contains text used to sort your favorites. Enter a category or select one of the existing categories from the catalog. You can therefore group your favorites according to various categories.
win	The favorite is available in Aurea.CRM win.
web	The favorite is available in Aurea.CRM web, CRM.pad and CRM.mobile.
groupware/connector	The favorite is available in CRM.connector.

Context Menu for Favorites

You can determine which favorites are displayed using the context menu. You can combine the following options with one another; i.e. you can display all your own Aurea.CRM win favorites, for example.

My Own	Displays your own favorites. This option is enabled by default.
win	Only displays those favorites for which the **win** check box is enabled. This option is enabled by default.
Companies	Only displays company records. This option is disabled by default.
Person in Company	Only displays person records. This option is disabled by default.

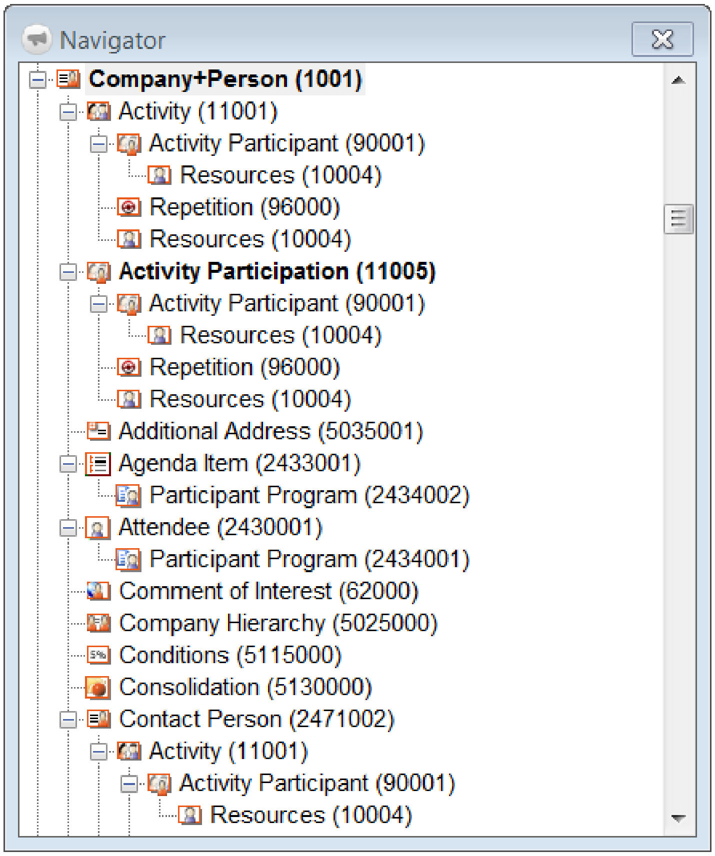
Note: If your administrator has configured additional info areas that can be added to your favorites, these info areas are also available from the context menu.

Navigator Window

The navigator window can be used to help keep track of how the different info areas relate to each other, as well as enabling you to directly access info areas.

To use the navigator:

1. Select **Window > Show Navigator** from the menu.



This opens the navigator window. The navigator window displays all the levels and their relationship with one another. The currently opened levels are highlighted in bold.

2. Switch to a level that is currently opened by clicking on the corresponding line. Open a new level by double-clicking on the desired level in the navigator.

Note: If only the currently opened levels are displayed in the navigator, right-click in the window and select **Show all info areas** from the popup menu.

---

3. Use the plus and minus signs in the navigator to expand and contract the tree structure. To hide these signs, right-click in the navigator window and select **Show +/-** from the menu.

Adding New Records

Learn how to add new records in Aurea CRM.win.

New entries are added to the database using the **New** button ().

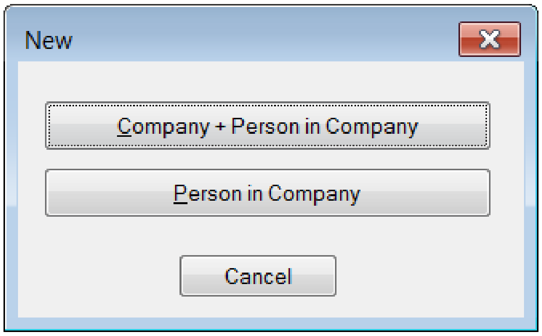
Note: If you do not have the necessary access rights to add data, the button is disabled.

You can copy data from existing records to speed up the entry of data. Select **Edit > Copy Record** in the source record and **Edit > Paste Record** in the target record to copy and paste data between records.

Adding a New Company

To add a new company:

1. Switch to the **Company+Person** level (using the icon bar or the **Info** menu).
2. Click the **New** button ( ). The **New** dialog box is opened.



3. Click the **Company + Person in Company** button.
4. Enter the data.
5. To add a new person to the database along with the new company, fill out the person data in the lower part of the screen.
6. Save the new record using the **Save** button ( ).

If Aurea.CRM win is configured to use an external application to verify addresses, a dialog is displayed containing alternative suggestions, see Address Verification.

If a similar company is found, the match-up function is started, see Match-Up.

Adding a New Person

To add a new person to an existing company:

1. Switch to the company.
2. Click the **New** button ( ).
3. Click the **Person in Company** button.
4. Fill out the **Person** mask. The fields in the company mask are grayed out. You cannot edit these fields.
5. Save the new record by clicking on the **Save** button ( ).

If a similar company is found, the match-up function is started, see Match-Up.

Adding a Private Person

To add persons to the database that are not assigned to a company:

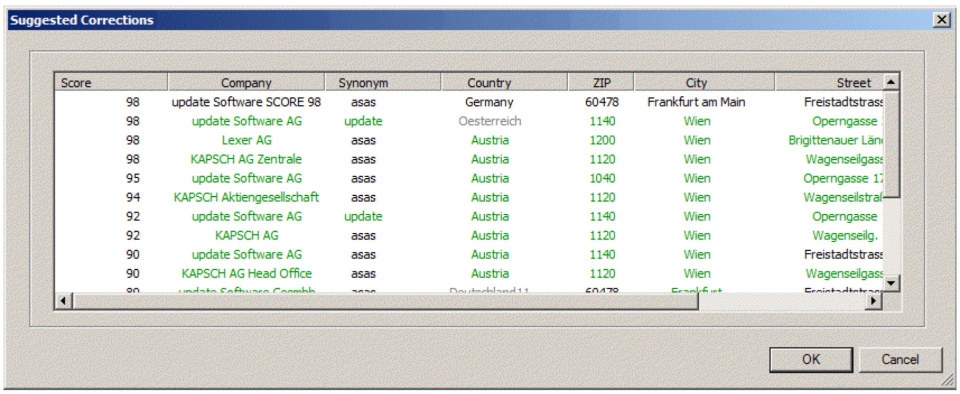
1. Switch to the **Person** info area (using the icon bar or the **Info** menu).
2. Click on (**New**).
3. Enter the person's data.
4. Click on (**Save**).

Select **Contact Person** from the contact person to link a private person with a company. The person is then displayed in the **Company+Person** level for the corresponding company.

For more information, see Customer Data on page 11 and Managing Companies and Persons in the *CRM.core Administrator Guide*.

Address Verification

If Aurea.CRM win is configured to use an external application to verify the plausibility of addresses, the following dialog is displayed when adding records (companies, persons, other addresses, properties):



The alternative suggestions are displayed together with the score awarded by the external application. Differences between your entries and the suggestions are displayed in green. Select a suggestion and click on **OK**.

Catalog values that are present in neither the catalog base language nor the current language are displayed in gray. These suggestions cannot be applied.

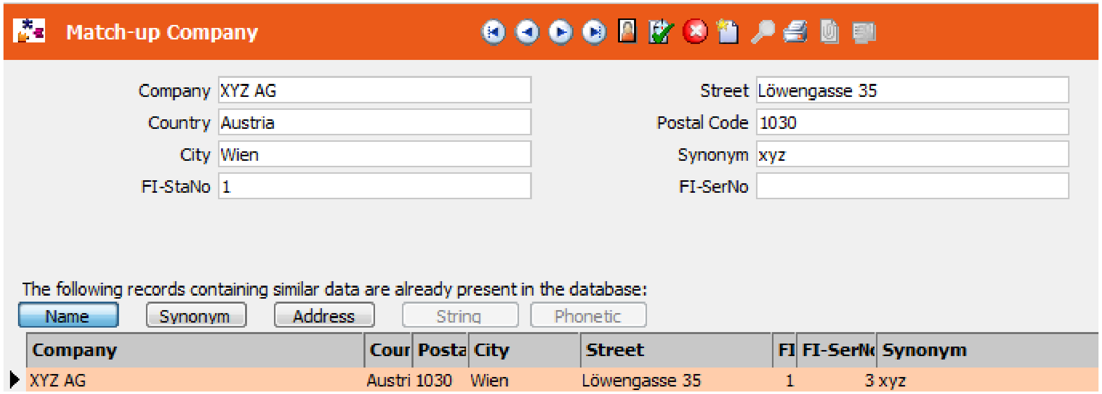
Your administrator can define a threshold for the address search. If the score assigned to an alternative suggestion is higher than this threshold, the address is automatically changed without displaying the dialog.

For more information on configuring an external application to verify addresses, see External Address Search in the *CRM.core Administrator Guide*.

Match-Up

If you add a company or person, the record is compared to existing records in the database. If a similar record is found, you are asked to match up the new record with the similar records.

Company Match-up



You have the following options when matching up companies:

- If the company does not correspond to one of those in the list, click **New** () in the header to add the company as a new record.
- If the company is identical to one of those in the list, select the company in the list. Click the **Found** button (). The new company is merged with the existing company. If similar persons are found, then you need to repeat the match-up process for these persons too.
- Click **Cancel** () if you do not want to add the company.

Person Match-up

You have the following options when matching up persons:

- If the person does not already exist in the database, click on (**New**) in the header to add the person record.
- Only for **Person in Company**: Click on (**Person in Company**) to display all persons in the selected company. Click on **OK** or **Cancel** to return to the **Match-up Person** mask.
- If the person is found, select the person from the list and click on (**Found**) to merge the two persons.
- Click on (**Cancel**) if you do not wish to add the record.

To determine the match-up criteria:

1. Select **Extras** > **Other Options** from the menu.
2. Choose one or more options under **Match-up Company** or **Match-up Control (Person)**:
   - **Name:** The company name or the name of the person is used to compare records. A search is carried out for similar company or person names.If you wish to match up contact persons across the entire database, and not just within a single company, select the **Name** and **Address** options under **Match-up Control (Person)**.
   - Address: All phonetically similar companies or persons at the same location are displayed.
   - Synonym: Companies are matched up using the synonym entered in the Synonym field.

Adding Other Records

You can add records storing contact information, notes, mailings etc. for companies and persons in your database.

There are dependent and independent records, see Database Structure on page 11.

To add independent records:

1. Switch to the desired info area.
2. Click (**New**).
3. Enter the desired data.
4. Click (**Save**).

To add dependent records:

1. Switch to the company or person you wish to add the record to.
2. Switch to the corresponding info area by clicking on the appropriate icon in the icon bar or select the info area from the **Info** menu.
3. Use the (**Dependence**) button or select **Data > Company-Related Info**/**Person-Related Info** from the menu to determine whether to add dependent records to a company or person in the company:
   - **Company-Related Info:** Displays all records related to the selected company. New records are added for the company.
   - **Person-Related Info:** Displays all records related to the selected person. New records are added for the person.
   - **Both:** Displays records related to either the company or the person. No new records can be added when this option is selected.

   Note: If you enter records for a company without a person, then there is no difference between the **Company-related Info** and **Person-related Info** options. Company-dependent data is always displayed in this case, irrespective of whether you select **Company-Related Info** or **Person-Related Info**.

   If you enter records for a private person (**Person** info area) all dependent records are person-related as well.

4. Click (**New**).
5. Enter the desired data.
6. Click (**Save**).

Defining Default Values

Default values are automatically entered in fields whenever a new record is added. By defining commonly used values as default values, the time required to input data can be reduced significantly.

To define default values:

1. Switch to the info area you wish to define default values for.
2. Select **View > Default Values** from the menu. A window containing all the fields for which you can define default values is displayed.
3. Enter the default values in the fields.
4. Click the **Save** button to save the default values.
5. Click the **Close** button to close the window with the default values. Confirm the message with **Yes**. You are returned to the current info area.

Note: Your administrator may have prevented you from accessing some fields. You therefore cannot define or modify default values for these fields. If you need to change these default values, contact your administrator.

Default Values Defined by the Administrator

It is strongly recommended that your company decides on default values for the following and for your administrator to set them for all users from the very beginning:

- **Country:** A **Country** must be entered in the **Company** or **Person** info area in order to correctly allocate the **City** and **Postal Code** fields.

Entering a country also speeds up the search for companies and persons.

- **Language and Label:** Defining the **Language** and **Label** as a default value for **Person** and **Person in Company** is essential to ensure that any letters generated by Aurea.CRM win contain the correct greeting and the correct address format.

Editing Records

Learn how to edit records in Aurea CRM.win.

To edit records:

1. Open the record in mask view.
2. Click on a field, or use the **Edit** button (). You are now in edit mode.
3. Change the data.
4. Click on **Save** (). You return to view mode.

Note: If you do not have the rights required to edit data, the **Edit** button is disabled.

Your administrator may have configured your interface so that the **Edit** option is available from the context menu.

Use the arrow keys to navigate between companies or persons without leaving edit mode. This is particularly useful when you have to make the same changes to a number of successive records. You are prompted to save your changes when switching between records in edit mode. You can suppress this prompt by selecting **Extras** > **Other Options** from the menu and activating the **Suppress Aurea prompt** check box.

Deleting Records

Learn how to delete records in Aurea CRM.win.

To delete a record from the database:

1. Search for the record you want to delete.
2. Click on the **Delete** button ().

Note: If you do not have the rights required to delete data, the button is disabled.

Your administrator may have configured your interface, so that the **Delete** option is available from the context menu, and not using a button.

If records are deleted on a station that communicates with other stations, the record is only marked for deletion (**DelCd** field) and is only actually deleted from the local database once the deletion has been communicated to all other stations. Until the record has been finally deleted, select **Data** > **Display Deleted Records** to display those records marked as deleted, see Communicating Deleted Records in the *Aurea.CRM win Administrator Guide*.

Deleting a Company and Person in Company

To delete a company and a person:

1. Click the **Delete** button ().
2. The system prompts you to confirm that the person should be deleted. Confirm with **Yes**.The system prompts you to confirm that the company should also be deleted.
3. Confirm with **Yes** if you want to delete the company, or select **No**.

Note: If a company or person is deleted, all complementary information relating to the company, persons etc. is also deleted.

Searching

Learn how to perform search on Aurea CRM.win.

Starting the Search

Depending on your settings and access rights, you can search for records using the following methods:

- Select **Data** > **Search** from the menu. The search mask for the current level is displayed.

Note: Certain levels, such as the **Daily Overview** or **Calendar** have no search function.

- Select **Data** > **Company Search** from the menu to search for companies**.**
- Select **Data** > **Person (Company) Search** from the menu to search for persons**.**

Use the **Search** button in the general toolbar.

- Use the **Find** button () in the level header.
- In some levels, the **Find** button () accesses a dedicated search mask for the current level (e.g. **Company+Person, Person, Offer, Property** or **Item Master**).
- Click on (**Find**) in a link field in the mask or list.

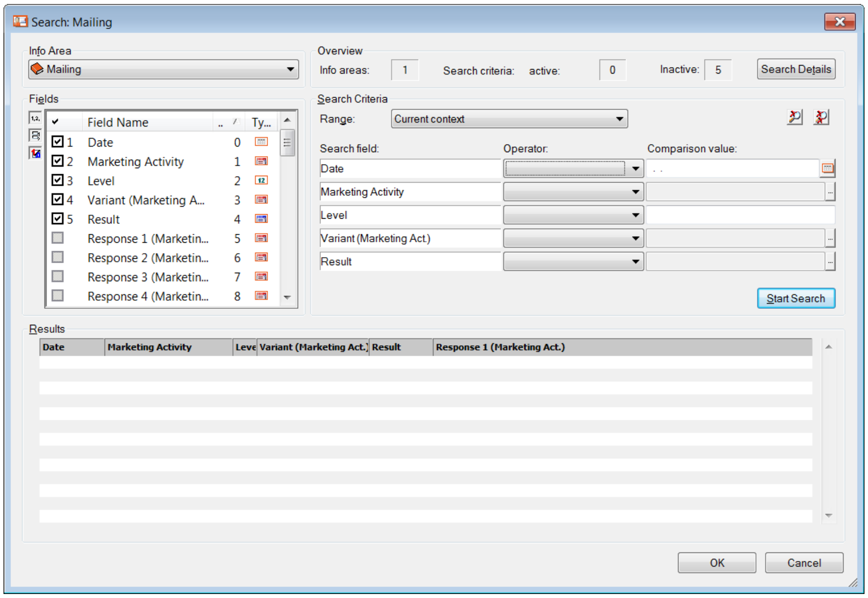
For example, in the **Marketing Activity** info area, you can search for a campaign in the **Campaign** field. The reference is displayed in the field as a hyperlink.

Executing the Search

To execute a search:

1. Switch to the level from which you wish to start the search.
2. Start the search, see Starting the Search.

   The **Search** dialog box is displayed.



3. If the current level contains several info areas, select the info area you wish to search in under **Info Area**.
4. By default, five fields are available per info area. Use these fields for the search or disable one of the fields under **Fields** and choose an alternative field.
5. Select an operator in the **Operator** column and the value you wish to compare data with in the **Comparison value** column.

Note: If you do not enter an operator, all records are returned.

---

6. Click on **Start Search**.
7. The search results are displayed in the **Results** pane.
8. Select the record and click on **OK** to display the record in mask view.

Further information on the **Search** dialog box can be found under see Search Dialog Box.

For information on the masks used by the company and person searches, see Searching for Companies and/or Persons on page 46.

Search Dialog Box

The following fields are available in the search dialog box:

- **Overview:** The **Info areas** field displays the number of info areas that can be selected using the **Info Area** drop-down menu. The **active** field displays the number of active conditions. The **Inactive** field displays the number of inactive conditions.
- **Info Area:** The info area that is searched is displayed here. E. g. you can choose whether you wish to search the company or person in company fields in the **Company+Person** level.
- **Fields:** You can select a maximum of five search fields. Your administrator can determine that you cannot change the default search fields, see Search Tab

(**Allow changes to search fields** option) in the *Aurea.CRM win Administrator Guide*.

- **Search Criteria**:
  - The Search field column displays the selected search fields. The values stored in these fields are compared to comparison values. Conditions that include multiple fields are linked with a logical AND (i.e. all criteria need to be met).
  - Operator column: You can choose from the following operators:

    For all field types: = equal, <> not equal

    In addition, for text, numerical, date and time fields: > greater, < less, >= greater equal, <= less equal, () included,)(not included.

    In addition, for numerical, date and time fields: [] within range,][not within range. Enter the range (with a space before and after the hyphen) or select a time period in the calendar (using Ctrl + click).

    Example: All activities with values between 1,000 and 9,000 in the **Costs** field:

  You can set the status of search conditions that you frequently use to inactive, to save having to define them again. To do so, select the "empty" entry from the **Operator** drop-down menu.

- **Current condition active**: This check box is only visible if your administrator has defined search criteria for this info area. Enable the search criteria defined by your administrator using this check box.

If you position the cursor over the **Current condition active** check box, you see a tooltip describing the search condition, provided your administrator has configured the appropriate settings, see Search Tab in the *Aurea.CRM win Administrator Guide.*

- **Range**:
  - **Current context**: This option is only available in dependent info areas. The current context limits the search to those records that are dependent on the currently active parent record. For example, in the **Activity** info area, those activities that belong to the person or company displayed in the summary index card are included in the search.
  - **Entire database**: The entire database is searched for results. If the info area is a dependent info areas, the search is executed in the active parent **level**. For example, all documents linked to an offer item are searched.

- **Case-sensitive**: Enable this check box if you wish to take upper and lower case into account in the search.

Note: This check box is only available if the SQL server supports case-sensitive searching.

- **Results** (pane): The results of the search are displayed in this list.

Your administrator can define which columns are displayed in the list, and you can edit the list to suit your needs, see Defining Lists.

Select the desired entry in the results list and click **OK** to return to the mask view for the selected record. You can also double-click on the desired entry.

The following buttons are available in the search engine:

- **Search Details**: Displays an overview of the defined search settings.

The search area, predefined search criteria (enabled using the **Current condition active** check box) as well as additional search fields are displayed.

- **Start Search:** Starts the search.

The following buttons are only available if your administrator has determined that you are allowed to edit the search fields, see Search Tab in the Aurea.CRM win Administrator Guide:

- (**Predefined search fields**, Alt+P): Displays the predefined search criteria in the **Search Criteria** pane.
- (**Clear current search fields**, Alt+E): Removed the search criteria from the **Search Criteria** pane for the info area selected under **Info Area**.
- (**Clear all search fields**, Alt+F): Removes all the search criteria.

Searching for a Person in a Company

1. Search for the company and select the company in the search list (by clicking on the entry or navigating using the arrows).
2. Click on (**Person in Company**). The **Select Person in Company** dialog box opens.
3. Select the person you are searching for, and confirm with **OK.** Alternatively, double-click on the entry.

This takes you straight to the record.

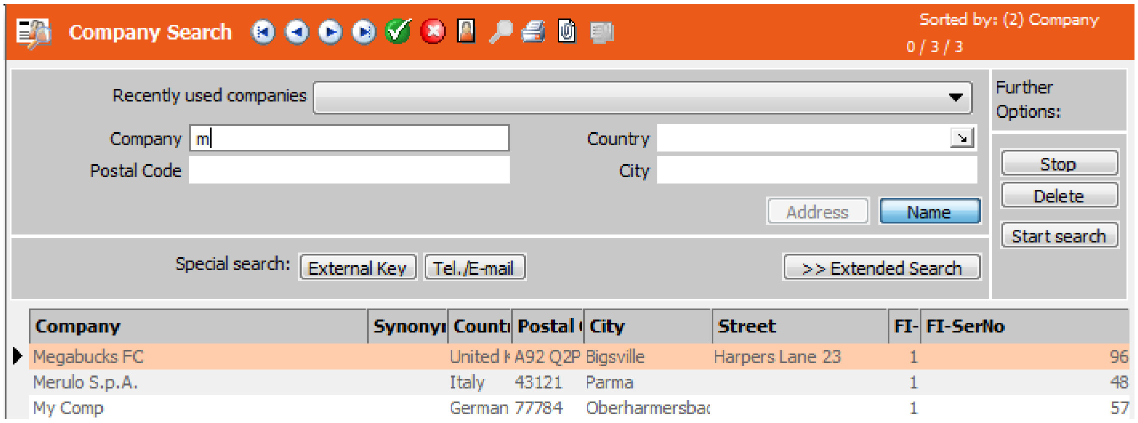
Searching for Companies and/or Persons

There is a dedicated search engine available for both companies and persons.

To search for a company or person:

1. Select **Data** > **Company Search**, **Data** > **Person (Company) Search** or **Data** > **Person Search** from the menu.

   A search mask is displayed.



2. Companies or persons previously selected from the results list are available from the **Recently used companies** or **Recently used persons** drop-down lists. Select one of these entries (Alt+U) to switch directly to the corresponding record.
3. Click on **Extended Search** to display all the search options.
4. Enter the information you know in the search fields. Either enter the data completely or use wildcards.

   The following fields are available in the company search:

   - Company: If you know the start of the company's name, enter it. You do not need to enter a wildcard in this case; i.e. searching for "m" returns all companies whose name begins with M.

     Use wildcards if you know several parts of the name, e.g. enter "Quick * Ltd." to return "Quick Services Ltd.", "Quick Services Europe Ltd." etc.

     If you only know a portion of the name, also enter the country and postal code and use the **Address** option to search.

     If you do not know the postal code, the string should either be long or relatively unique, and you should at least enter the city and country. Use the **String** search option in this case.

   - Country, City, Postal Code: If you only know the start of the country, postal code or city, add a * to the end of the string. Include the country when searching by postal code, as postal codes are linked to countries in the City info area.
   - Synonym: Enter the start of the synonym and click on Synonym. You can also use the * wildcard.

     Note: Your administrator can determine that you do not need to enter wildcards at the end of a string, see Configuration Info Area (**Search** category, **Synonym without wildcards** option) in the *CRM.core Administrator Guide*.

   - Street: If you know part of the street name, enter it. You can use wildcards.
   - FI-StaNo, FI-SerNo: Station number and serial number of the record.

The following fields are available in the person search:

- Last Name: You do not need to use the * wildcard when using the Name search option. If you are not sure of the spelling of the surname, use the Phonetic search option.
- First Name: You can use wildcards to search names. For example, "Ger*d" returns "Gerard" and "Gerald".
- Form of address: The person's form of address (Mr., Ms.).
- (top-most) Country, Postal Code, City, Street: The person's address. If you only know the start of the country, postal code or city, add a * to the end of the string. If you do not know the last name, enter the country and postal code and use the Address option to search.
- Company: If you only know a portion of the company name, enter it and use the * wildcard.
- Synonym: This field cannot be used in the person search.
- (bottom-most) Country, Postal Code, City, Street: The company's address. You can enter wildcards for the postal code, city and street.

Use the **Identical characters** configuration entry to determine that (combinations of) letters are treated as identical characters, see Configuration Info Area (**Search** category, **Identical characters** option)in the *CRM.core Administrator Guide*.

5. Once you have confirmed the input in a field by pressing Enter of Tab, the search is started automatically.

   Use the corresponding buttons to start the search using specific options, see Search Options on page 49. If you know part or all of the telephone number, use the **Tel./E-mail** option, see Searching for Telephone Numbers and E-mail Addresses on page 51.

   Note: If the **Search on Click** option is enabled, the search is only started once you click on one of the buttons, see Configuration Info Area (**General Settings** category, **Search on Click** option)in the *CRM.core Administrator Guide.*

   ---

6. The search results are displayed in the lower part of the window. The search displays a number in the header in the format X/Y/Z (total number of possible records (only when searching according to an index field such as a company, and if the **General Settings/Display Hits** option is enabled in the **Configuration** info area)/total records counted/number of records found).
7. Click on a column header to sort the search results.

Note: Sorting a large number of records can take some time.

8. Select the desired company or person and click on ✅ (**OK**). Alternatively, double-click on the desired record. The company or person is transferred.

Search Options

Learn about the various search options.

You can start the search with the following options:

- **Start search:** Locates the companies in the database that are closest alphabetically to the one that you searched for (or that comes close to the serial number of the company/person you searched for, depending on the active sort order).
- **Name:** Searches for companies or persons in the database whose name starts with the letters you have entered. This option is available if a search criterion is entered in the **Company** or **Last Name** fields.
- **Address:** This option is only available if, in addition to the **Country** field, entries have been made in the **Postal Code** and **City** search fields. Aurea.CRM win returns a list of all companies with the entered postal code and/or city.
- **External Key:** Click on the **External Key** button, and enter a company (or person) key in the **Search Ext. Company** (or **Person**) **Key** dialog box. The system searches for the company or person this key has been assigned to.
- **Tel./E-Mail:** Click on the **Tel./E-Mail** button and enter the telephone number or email address of the company or person in the resulting dialog box. The system searches for the company or person with this telephone number or e-mail address. You can enter any number of digits in the telephonefield.

For further information on searching for telephone numbers and e-mail addresses, see Searching for Telephone Numbers and E-mail Addresses on page 51

- **Delete:** The **Delete** button removes all the entries from the search fields.
- **Stop:** The **Stop** button stops the search prematurely, for example, when the company you are looking for is already in the result list.

The following options are available from the extended search mask (opened by clicking on the **Extended Search** button):

- **Synonym:** This search option is only available in the company search. Aurea.CRM win searches for a company with the synonym entered in the **Synonym** field of the company.
- **Phonetic:** Aurea.CRM win searches the database for phonetically similar names (e.g. O'Neal and O'Neill), see Phonetic Search on page 50.

This option is available if the **Company** or **Last Name** fields contain data.

- **String:** This search option is only available in the company search. The system searches for the string entered in the **Company** search field. The string can occur anywhere in the company name. For example, searching for "**Market**" returns "**Super Marketing**" and "**Boston Market**."
- **Fast:** In a "normal" company search, after entering the company name (and confirming with Tab or Enter), you can enter other search criteria such as country and city after Aurea.CRM win has already begun the search. If you click the **Fast** button before a string or phonetic search, you can no longer enter further search criteria. Aurea.CRM win performs a high-speed search for the desired company.
- **In Company:** This button is only active when matching up persons. Use it to search for persons within the company.

Phonetic Search

The phonetic search is based on international phonetics, and does not take English spelling into account.

It also ignores the idiosyncrasies of English spelling.

Vowels are completely ignored by the search, and only consonants play a role. Consonants are divided into categories based on phonetic similarity:

- B=F=P=V
- C=G=J=K=Q=S=X=Z
- D=T
- M=N
- vowels=W=Y=H.

To search for compound names, compound entries have to be entered. A single entry is not enough to find a compound name.

If you do not know whether a letter is repeated, enter the letter twice. If you are unsure as to whether a 'm' or 'n' is used, enter one of the two. If you are unsure whether the name includes a silent 'h', enter the 'h'; similarly, if you do not know if a vowel occurs within the name, enter the vowel. Search for "Wilde" instead of "Wild", "Whittman" instead of "Witman".

Note:

Your administrator can disable the phonetic search, see Configuration Info Area (**General Settings** category, **Phonetic Search** option) in the *CRM.core Administrator Guide*.

Searching for Telephone Numbers and E-mail Addresses

Learn how to search for telephone numbers and e-mail addresses.

To search for company or person using their telephone number or e-mail address:

1. Click on the **Tel./E-mail** button in the company or persons search. You can also select **Search Tel. No.** from the context menu in the **Company+Person** level.
2. Enter the telephone number or e-mail address you are searching for in the dialog box. Do not use placeholders.
3. Click on **Start**.
4. Select the desired entry in the list and click and click **OK** or double-click on an entry to switch to that record. Click on **Cancel** to remain at the current record.

Note: Telephone numbers and e-mail addresses stored in the **Company**, **Person in Company** or **Person** info areas and e-mail addresses from the **Other Addresses** info area are automatically saved in the **Tel.No./E-mail** info area. If problems occur using the search, select **Fill** from the context menu to update all entries.

Search Method

Aurea.CRM win uses the setting entered in your telephone profile to determine whether the telephone number is local, national or international.

Examples:

100	A short number is interpreted as being an internal rep's extension (the rep needs to be stored in the database as a person). Your country and area code and company phone number are added to the start of the number.
3334567	A longer number without a leading 0 is interpreted as a local number. Your country and area code are added to the start of the number.
07323334567	A number with a leading 0 is interpreted as a national number. The leading 0 is discarded and replaced with your country code.
0049893334567	A number beginning with 00 or + is interpreted as an international number. The 00 or + is discarded when searching.

The complete number (i.e. including country and area code) is searched for in the database. If the number is not found for a person, up to 3 final digits are discarded from the number and the search repeats.

Note: The maximum number of digits that are discarded is defined in your telephone profile, see CRM.phone in the *CRM.core Administrator Guide.*

The search terminates:

- If a matching company or person number is found. Your administrator can determine (in your telephone profile) that the search is only terminated if the search results include at least one company (by disabling the **Do not check hits for company number** option).
- Once the maximum of five digits have been discarded
- If the remaining number only contains 6 digits

Further information on searching for phone numbers can be found in under Telephone Number Search in the *CRM.core Administrator Guide.*

Sorting Records

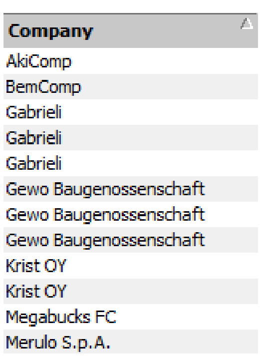
Learn how to sort records in Aurea CRM.win.

Sorting by Columns

To sort a list:

1. In list view, click the column header.

   The list is then sorted by this field in ascending order. An upward arrow is shown in the header.

   The **Ascending** option in the **Data** menu is enabled automatically.

2. Click the column heading again.

   The list is then sorted in descending order and a downward arrow appears in the column heading.

The **Descending** option in the **Data** menu is enabled automatically.

3. Click the column heading once again.

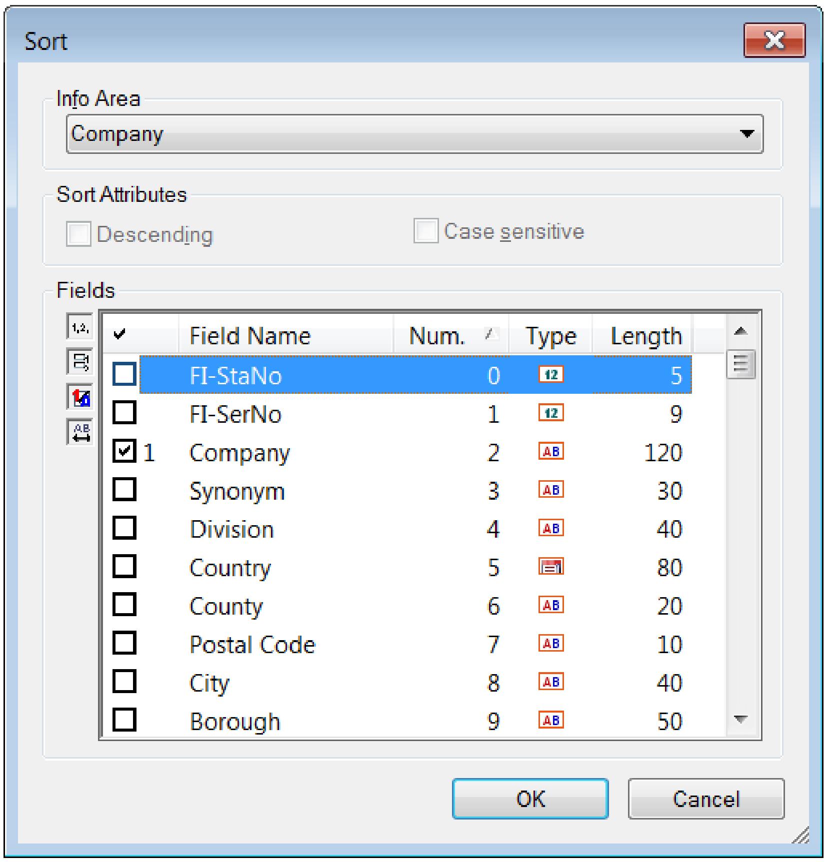
The sort criteria are removed. The data is sorted according to the criteria defined under **Data > Sort**.

Sorting Using Any Field

To sort an info area according to any of its fields:

1. Select **Data > Sort** from the menu.

   The **Sort** dialog box opens.



2. You can use the (**Order**), (**Number**), (**Type**) and (**Length**) buttons to display additional info for each field.
3. Double-click the corresponding field or click on the check box to select the sort criteria. Multiple fields are sorted according to the order in which you select them.

Note: You can click in the list field and enter the first letter to quickly switch to the desired field.

4. Use the **Descending** check box to determine whether records should be sorted in descending order rather than ascending. Use the **Case sensitive** check boxes to specify whether upper and lower case letters should be treated differently.
5. Click **OK**.

All the current info area's records are sorted.

The sort order is retained for each info area. If you exit and then re-enter Aurea.CRM win, the previously defined sort order is still valid.

The order of the fields is displayed in the column header as superscript numbers.

The sort order is also taken into account when printing out lists.

Note: Because it takes a long time to sort large numbers of records, it is advisable to narrow down the data to be sorted by defining conditions or selections first, see Conditions and Selections on page 93. You can also use the quick search, see Quick Sort with Indices.

Quick Sort with Indices

Fields that are indexed allow you to sort data in a matter of seconds.

1. If the current level includes more than one info area, select **Data > Sequence** from the menu to determine which info area to sort.
2. Select **Data > Sort by** from the menu to determine the index used to sort the selected info area.

Note: If you select a sort index with the "NOT NULL" attribute enabled, the result does not contain records with empty values for the sort field, e.g. sorting companies by synonym only displays company records where a **Synonym** has been entered.

Conditions

Conditions are used to filter data. For example, you could define a condition specifying that all potential customers or scheduled activities should be displayed.

In a simple condition, the value in a field is compared to a comparison value or value of another field, see Defining Conditions on page 55.

Complex conditions can contain any number of sub-criteria linked with the logical operators AND or OR, see Defining Conditions with Multiple Criteria on page 60.

- If sub-criteria are linked using AND, the condition is only met if **all** sub-criteria are met.

Example: Postal Code >= 1000 AND Postal Code < 2000

- If sub-criteria are linked using OR, the condition is only met if **at least one of the** sub-criteria are met.

Example: Interest = Antiques OR Interest = Golf

Conditions are used throughout Aurea.CRM, for example:

- To define which records are displayed, see Activating or Deactivating Conditions on page 68.
- To determine the customers contained in a selection, see Selections on page 93.
- To determine the colors used to display different types of appointments in the calendar, see Calendar Interface Settings.

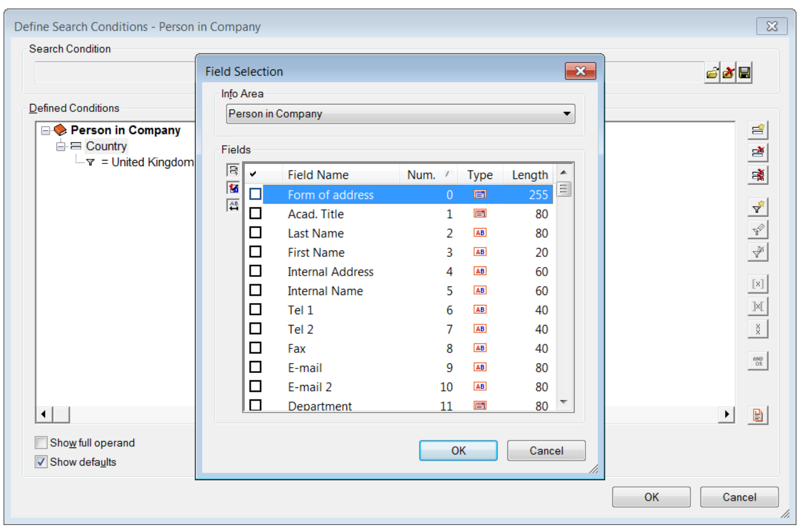
Defining Conditions

Learn how to define conditions in Aurea CRM win.

To define a condition:

1. Switch to the level you wish to apply the condition to.
2. Select **Data > Define Conditions** from the menu and select the desired info area.

   The following dialog boxes are opened:

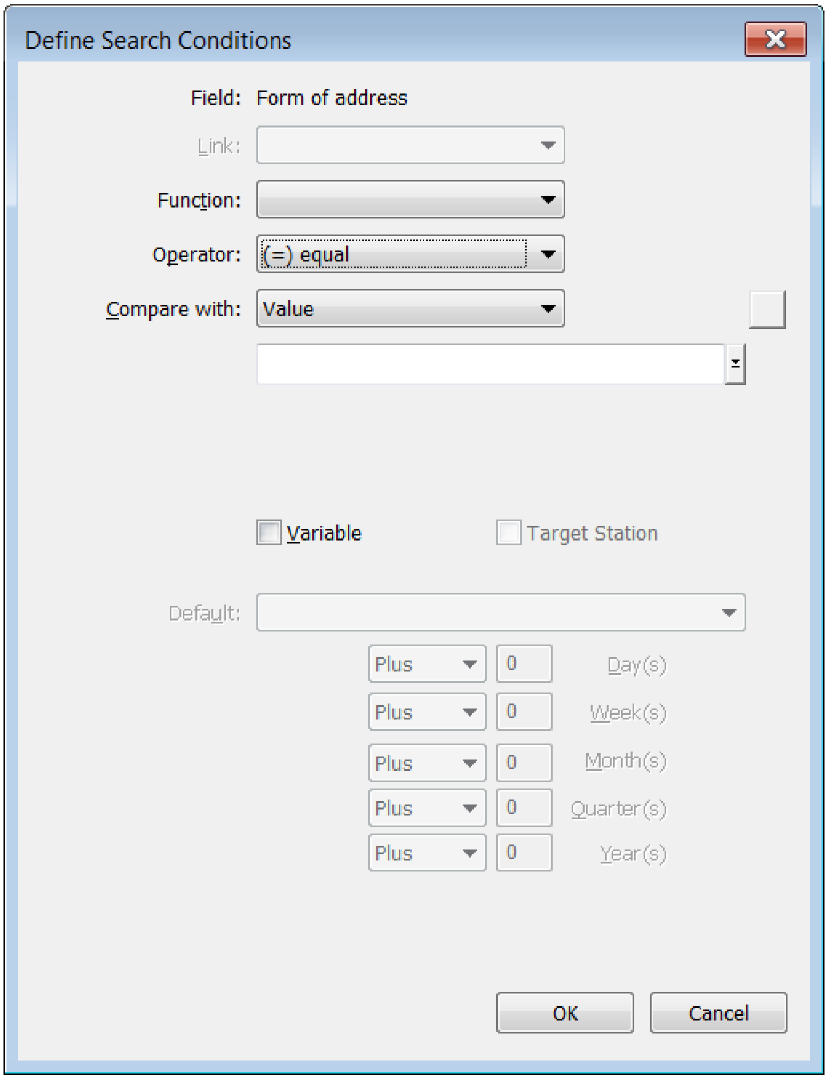
   Note: If the **Field Selection** dialog box is not displayed, click on to display it.

   You can use the icons to determine which columns are displayed in the list: (**Number**), (**Type**), (**Length**).

   Click on a column header to sort the list according to that criterion.

3. Select the field you wish to define the condition for.

   The **Define Search Conditions** dialog box opens.



Depending on the field type, this dialog can contain a variety of different options.

4. Select the desired operator. Depending on the field type, various operators are available:
   - **= equal**
   - **> greater**
   - **< less**
   - **>= greater equal**
   - **<= less equal**
   - **<> not equal**
   - **() included:** Tests whether the comparison value is contained at any point in the field contents.
   - **)(not included:** Tests whether the comparison value is **not** contained at any point in the field contents.

5. Select what to compare the field contents with from the **Compare with** drop-down list and enter the comparison value or select the target field. You have the following options:

- **Value:** Enter the comparison value in the field. You can enter wildcards in the comparison value.

  Click on (**Select**) to select a record for the comparison if you have selected a link field. This option is only available if the target info area has a key composed of the station number plus serial number. This option is not available for generic fields.

  Double-click or click on to select one or more values for catalog, date and rep fields.

  - Multiple catalog values/reps: One criterion is added for each catalog value/rep. The criteria are linked using a logical OR.

  - Date ranges (Ctrl + click in the calendar): A criterion is added for both the start and end date. The criteria are linked using a logical AND.

  When defining a condition applied to a date field, the linked time field is also displayed, so that you can enter both a date and time in a single step.

  To enter a value for the **Answer No.** field in the **Survey Result** info area, click on or double-click in the field to open a window and select the questionnaire, question and answer.

  When applying conditions to catalog fields, you can also apply the condition to the contents of the **Description** and **Ext. Key** fields of the catalog value.

  Syntax:

  `#desc|xk[,Language]*:ComparisonText`

  Explanation:

  descDescription

  xkExternal key

  [,Language]The language whose value is compared (**Language No.** in the **Language** (00)info area); optional

  - If a language is specified, the system only compares values in the specified language
  - If no language is specified, the system searches the language hierarchy from bottom to top until a matching catalog value is found. The condition is then evaluated for this language.

  ***An asterisk must either occur before the colon or in the comparison text.

  ComparisonTextThe comparison value, which can contain placeholders

Example:

#desc:Aus* returns all records where the description of the catalog value begins with "Aus".

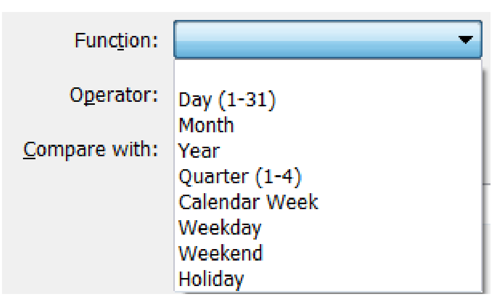
#xk*:1_2_3 returns all records where the external key of the catalog value matches "1_2_3" exactly

If you wish to change the field, click on (**Select Field**), disable the check box next to the current field, and select a new field.

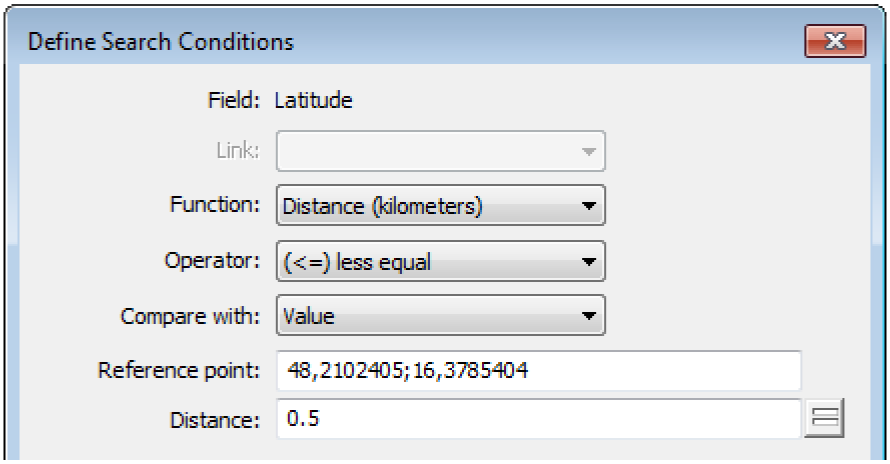
The **Field** option is not available for generic fields.

- Variable: If your administrator has defined variables dependent on the current rep or station, click on (Select variable value) to select a variable to be used as the comparison value, see Variables in the *CRM.core Administrator Guide*.
- Last Change: Use this option to apply a condition to the modification date of the field. Enter a date and time.

6. If you are defining a condition for a dependent catalog field (e.g. the **Interest** field in the **Interest** info area), you have two options:
   - Enable the **Independent of parent catalog** check box: You can use wildcards (? and *). For example, if you enter "ice*", all catalog values that begin with "ice" (ice hockey, ice skating etc.) meet the condition.
   - Leave the check box disabled. Select a parent and a dependent catalog value (e.g. "sport" in the **Interest Group** field and "ice skating" in the **Interest** field). The condition is met if the values in both fields correspond to the condition.
7. The **Ignore Hierarchy** option is available for hierarchy code fields. For more information, see Applying Conditions to Hierarchy Codes in the *CRM.core Administrator Guide.*
8. When defining conditions for date fields, you can select a date function from the Function drop-down list:

   This allows you to define conditions such as "if the date is a holiday".
9. When defining a condition for a geocoordinates field, you can select "Distance (kilometers)" from the **Function** drop-down list, enter a location (using geocoordinates) as the **Reference point** and specify a **Distance** in kilometers.



The condition returns all records that are within the defined radius of the reference point based on the geographic coordinates entered in the records.

10. When defining a condition for a group field (array fields linked to one another) using the "(>) greater" or "(<) less" operators, enable the **Exclusive** option to apply the condition (linked with a logical AND) to **all** fields in the group.

    Example: The condition "SIC1 > 2050" is defined for the **SIC1** field in the **Company** info area. If **Exclusive** is enabled, the condition "SIC1 > 2050 AND SIC2 > 2050 AND SIC3 > 2050" is applied to the record. If the **Exclusive** option is disabled, the condition "SIC1 > 2050 OR SIC2 > 2050 OR SIC3 > 2050" is applied to the record.

    Note: This option is only available for the operators "(>) greater" and "(<) less". Conditions using the "(<>) not equal" and ")(not included" operators are linked using a logical AND. Conditions using other operators are always linked with a logical OR. If the comparison value is empty, the behavior is reversed: <> and)(are applied to all the fields using a logical OR, all other operators using a logical AND

    ---

11. **Case sensitive:** This setting is only applicable to substrings in text fields. The value entered is compared to the field contents taking into account lower and upper case characters.

    Note: This option is only displayed if your database takes upper and lower case into account when searching.

    ---

12. Use the **Variable** field to

- define conditions for date or rep fields that automatically use the current date or rep as the comparison value, see Defining Variable Conditions on page 63.
- define conditions for a selection, report or analysis. Variable conditions can be changed upon starting the selection, report of analysis, see Variable Conditions With User Input on page 68.

Note: Comparisons with other fields cannot be defined as variable.

---

13. You can add further criteria, see Defining Conditions with Multiple Criteria on page 60.
14. Save the conditions, see Saving, Loading and Deleting Formats.
15. You are asked whether you wish to activate the current conditions. Confirm with **Yes**.

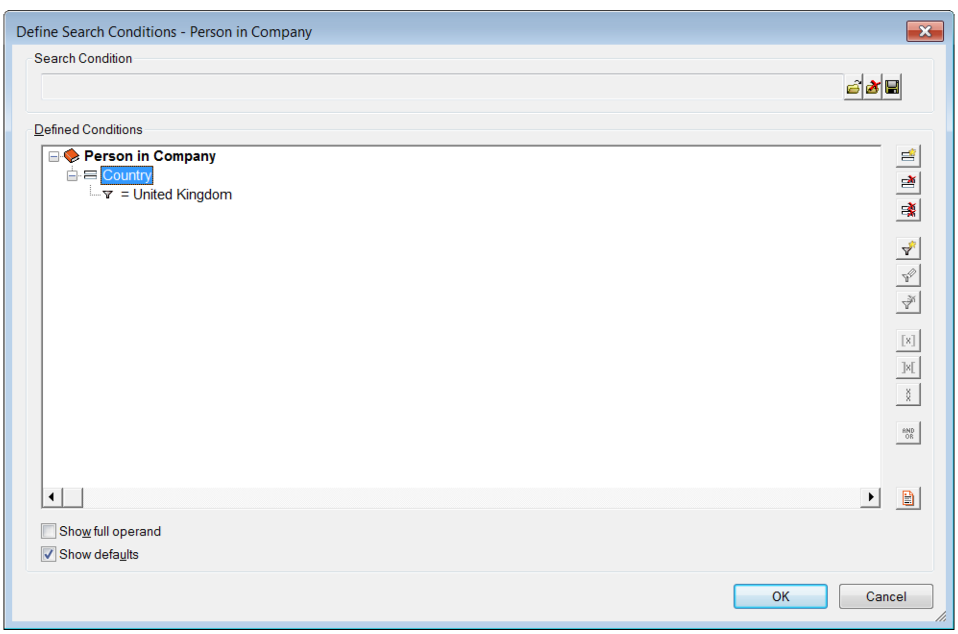
You are returned to the current info area. Only those records that meet the condition(s) are displayed.

Defining Conditions with Multiple Criteria

The **Define Search Conditions - <Info Area>** dialog box is displayed upon defining a condition.

For further details, see Defining Conditions on page 55.

You can define additional sub-criteria using the options in this dialog box. Further criteria can be linked using logical operators.



Click on  to load and edit existing conditions.

Click on **Display as text** () to display the contents of the condition as text. This allows you to copy the condition to the clipboard, for example.

Changing the Display

- **Show full operand:** Select this option to display the operator as text. **Example:** The "=" sign is displayed as "equal."
- **Show defaults:** The display of default values switches between two display types. **Example:** "Current date" or "12.03.07".

To further edit the condition, select a line and use the popup menu or the buttons on the right of the dialog box.

Defining further Sub-criteria

You can define sub-criteria in the following ways:

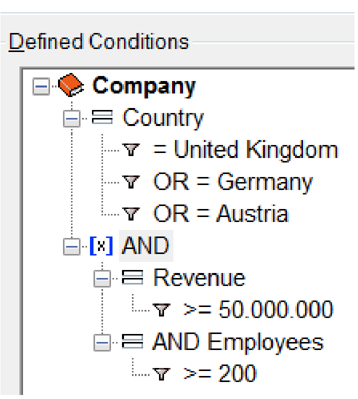
- Select an info area or field and select **Add a new field from the XYZ info area** from the popup menu or click on .
- Select a field or condition defined for a field and select **Add new condition for field XYZ** from the popup menu or click on .
- Select a condition defined for a field and select **New** from the popup menu.

Grouping Sub-criteria with Operators

Hold down the Ctrl key and select multiple fields with sub-criteria to group them. Select the operator:

- AND: Select **Group with AND** from the popup menu or click on .
- OR: Select **Group with OR** from the popup menu or click on .

Grouping criteria corresponds to placing them within brackets in a logical expression: For example, if you have defined the condition "A OR B OR C", and link the B and C sub-criteria with a logical AND, this results in the expression "A AND (B OR C).



Ungrouping Criteria

Highlight an operator and select **Ungroup** from the popup menu or click on (**Remove group**).

Changing Operators

Highlight an operator and select **Change operator to** from the popup menu or click on .

You can also double-click on the operator.

Editing Sub-criteria

Highlight a criterion and select **Edit condition** from the popup menu or click on .

You can also double-click on the criterion.

Deleting Criteria and Groups

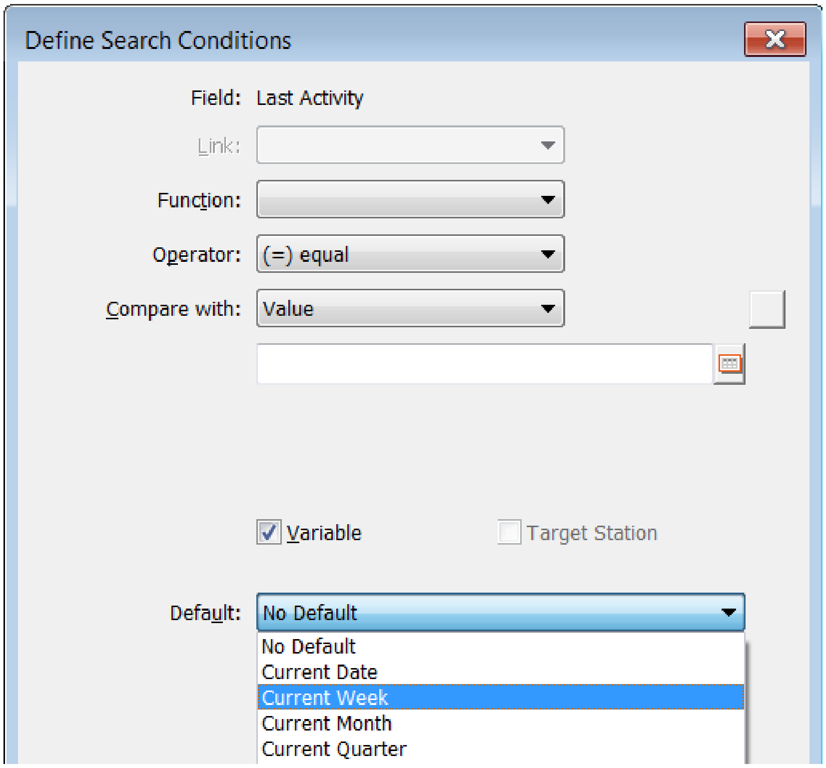
- Deleting all criteria: Highlight the info area and select **Delete all conditions for the XYZ info area** from the popup menu or click on . Confirm the prompt.

Note: You can enable the **Do not show this dialog box again** check box to prevent this prompt from being displayed in future. Should you need to reactivate the prompt, select **Extras > Other Options** from the menu and enable the **Prompt when deleting conditions** check box.

- Deleting all members of a group: Highlight one of the operators in the group and select **Delete entire group** from the popup menu.
- Deleting fields: Highlight the field and select **Delete this condition for field XYZ** from the popup menu or click on .
- Deleting conditions: Highlight a criterion and select **Delete condition** from the popup menu or click on .

Defining Variable Conditions

To define a variable condition, enable the **Variable** check box and select an option under **Default**.



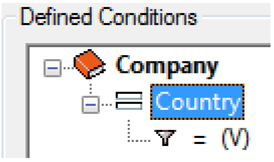
Variable conditions have different functions:

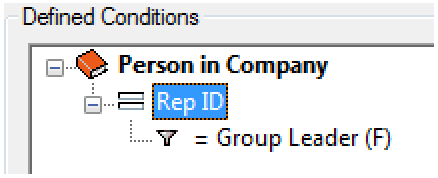
- The comparison value used by variable conditions for which no default value is defined can be determined when the condition is activated, see Variable Conditions With User Input on page 68.
- Further default values can be defined for variable conditions defined for date, time, rep and tenant fields. These default values are dependent on the current date, time, rep or tenant when the conditions are activated. They cannot be change upon activation.

Note: Your administrator can define additional fields from the **Station, Rep** and **Rep Additional Info** (OTC only)info areas that are available as variable default values, see *Configuration Info Area* (General Settings category, **Variable default values for conditions** option) in the *CRM.core Administrator Guide*.

- Variable conditions can also be used in selections, reports and analyses see Generating a Selection on page 104.
- Variable conditions allow you to define flexible output conditions for communicating between stations (**Target Station** option), see **Communication** in the Aurea.CRM win Administrator Guide.

Variable criteria are indicated with **(V)**; variable conditions with a default value are indicated with **(F)**.





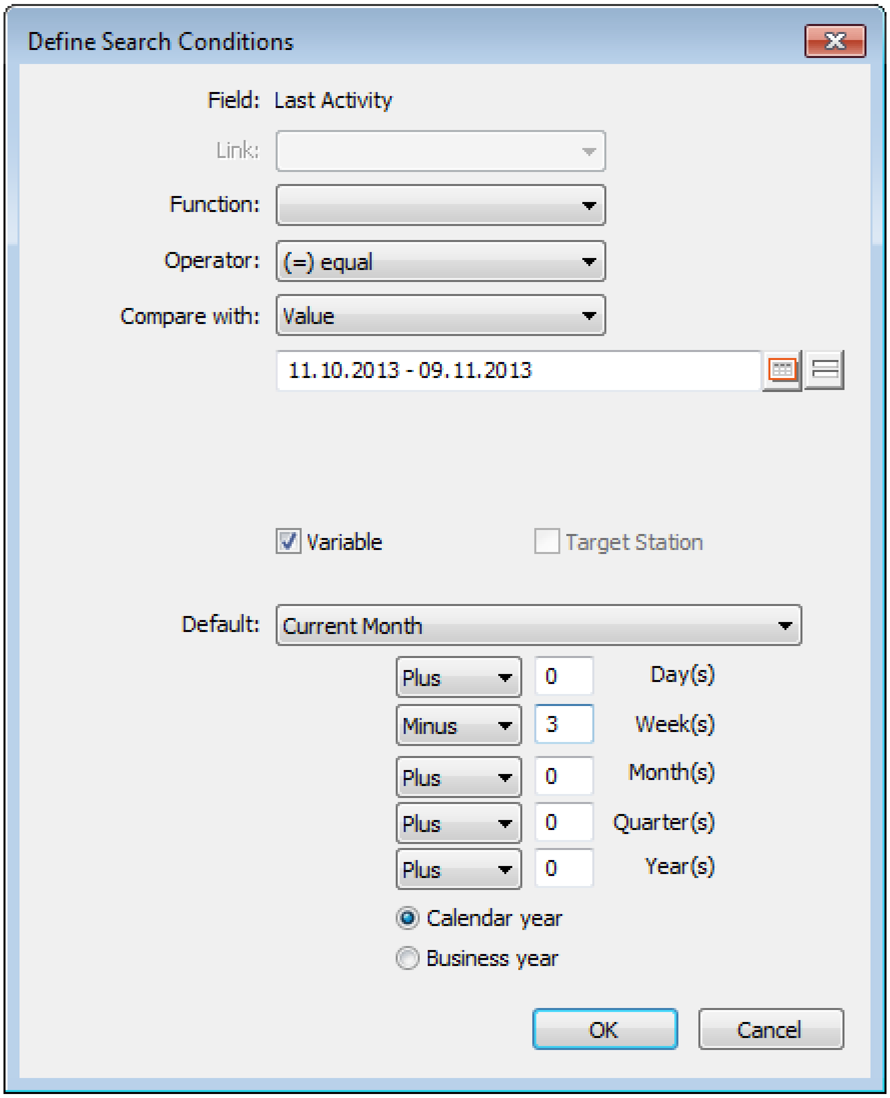
Note: Field comparisons (i.e. comparing the contents of one field with another) cannot be defined as variable.

Variable Conditions without Defaults

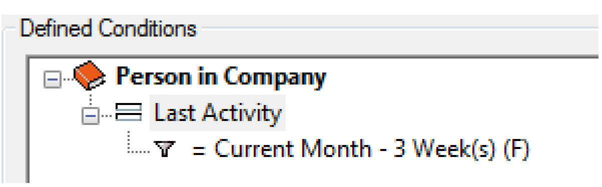
Variable conditions without default values can be defined for all field types. Select the **No Default** option.The comparison value used in the condition can be selected when the condition is activated, see Activating or Deactivating Conditions on page 68.

Default Values for Date Fields

You can further edit the comparison value of the date using the drop-down lists, e.g. to "the current month minus 3 weeks". The date range is displayed below the **Compare with** field.



Note: The **Calendar year** and **Business year** options are only displayed if your administrator has defined the start of the business year, see Configuration Info Area (**General Settings** category, **Start of Fiscal Year option**) in the *CRM.core Administrator Guide.*

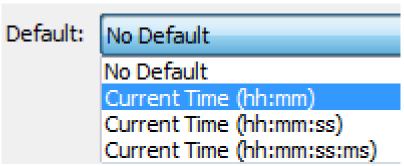


Upon activating the condition, the defined date (range) is determined based on the current date.

If you define a variable condition using a date function (see Defining Conditions on page 55) and select a time period under **Default**, the function is applied to the first day in the time period.

Example: The **Function** "Weekday" and **Default** "Current Month" would refer to the first weekday in the current month.

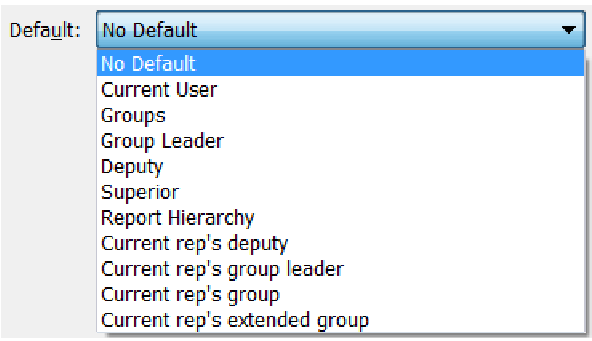
Default Values for Time Fields



Depending on the field type, one or more time formats are available.

When loading the condition, the current time is used.

Default Values for Rep Fields



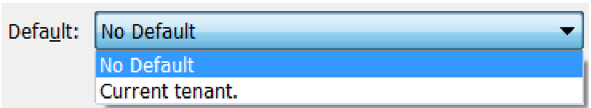
Upon loading the condition, the following are used as comparison values:

- The current rep
- All groups the current rep is assigned to
- All group the current rep is the group leader of
- All reps the rep is entered as deputy for
- The rep's superior
- All the rep's direct and indirect superiors ("Reporting Hierarchy")
- The current rep's deputy
- The current rep's group leader
- The current rep's group
- The current rep's extended group: The condition applies to the group entered in the **Org. Group** field in the **Rep** info area, and all groups directly allocated to this group in the **Group Allocation** info area. The condition is only applied to a single level of the hierarchy (i.e. sub-groups of sub-groups are ignored), see Assigning Reps to a Group in the *CRM.core Administrator Guide*.

Note: You can use hierarchy codes for reps, see Rep Hierarchy in the *CRM.core Administrator Guide*.

If you apply a variable condition using the "Superior" option to a **group field**, the condition is fulfilled by all groups where the current rep is the superior. If such a condition is applied to the "Report Hierarchy", the condition is applied to the parent groups.

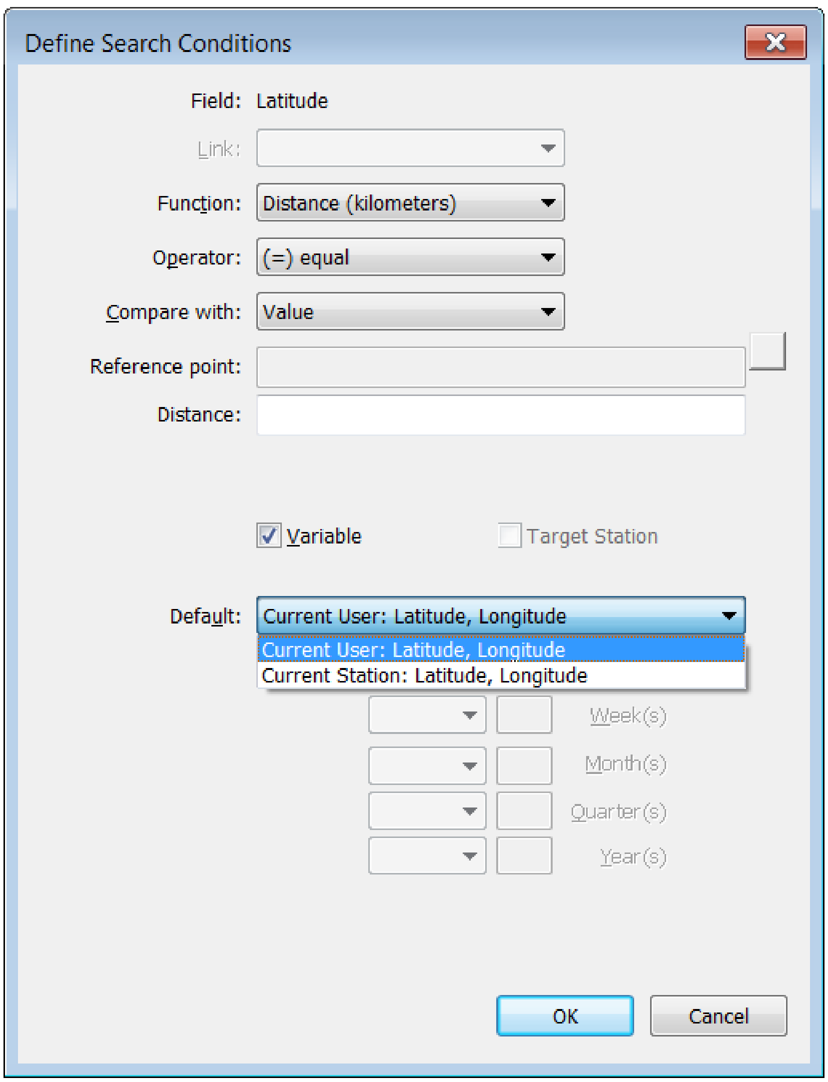
Default Values for Tenant Fields



Upon loading the condition, the tenant number of the current rep is used as the comparison value.

More information on tenants, see Tenants in the *CRM.core Administrator Guide*.

Default Values for Geocoordinate Fields



When activating the condition, those records are returned that are within a specific radius (defined in the **Distance** field) of the current rep or station. In this case, the **Reference point** is taken from the coordinates of the rep/station.

Note: Geocoordinate fields are defined for the **Rep** info area, you administrator can define geocoordinate fields for the **Station** info area if needed, see Aurea.CRM Field Types in the *CRM.core Administrator Guide*.

Activating or Deactivating Conditions

Learn how to activate or deactivate conditions.

To activate a condition:

1. Select **Data > Load Conditions** from the menu.
2. Select the condition from the list.
3. The **Enter Variable Condition** dialog box is displayed if the condition is variable, see Variable Conditions With User Input on page 68.
4. Click on **OK**. The condition is activated.

The name of the activated condition is displayed in the level header.

Select **Data > Activate Condition** from the menu to activate or deactivate the conditions. A tick next to the name of an info area indicates that conditions are currently active for that info area.

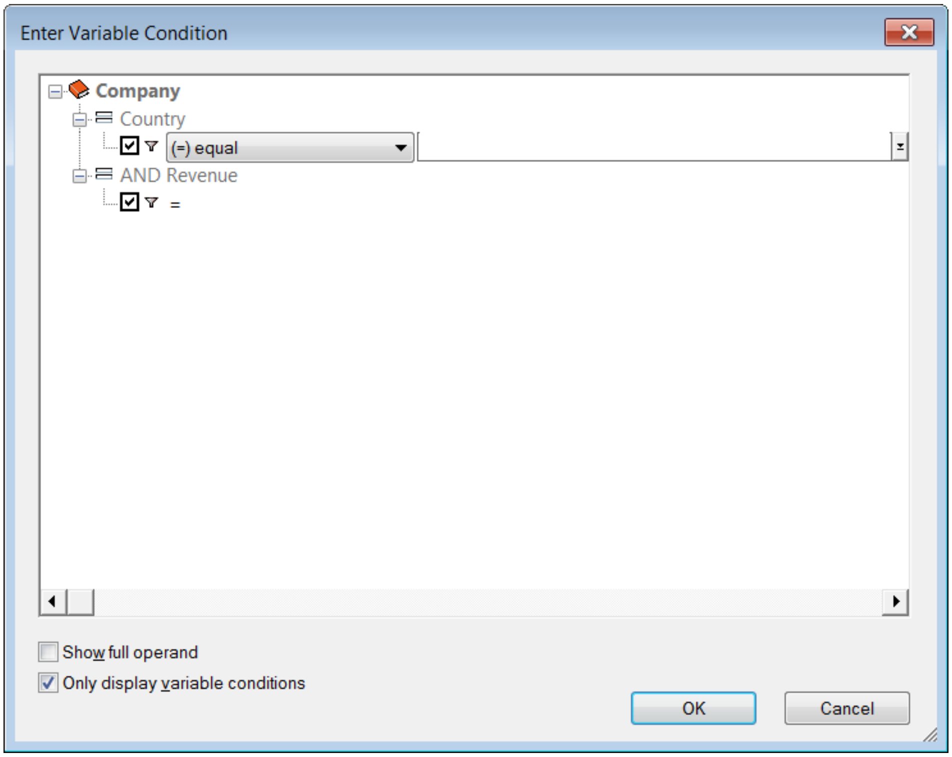
Note: If a level contains several info areas, conditions can be defined and activated for each info area. For example, you can apply conditions to both companies and persons in company in the **Company+Person** level. If you apply conditions to both info areas, only records that meet **both** conditions are displayed.

Variable Conditions With User Input

You can specify a value for conditions defined as variable when activating the condition or generating a selection.

Follow the below steps:

1. The **Enter Variable Condition** dialog box is displayed:



- Show full operand: Displays the operator as text (e.g. "equal" for "=").
- Only display variable conditions: Only displays variable conditions and hides all fixed conditions.

2. Edit the operator using the drop-down list if necessary and enter a value.If the field is a catalog field, you can open the catalog to select the desired value.
3. You can use the check boxes to enable or disable individual conditions. Click on an operator to switch between conditions. If you enter a value in a condition that has been disabled, the condition is automatically enabled.
4. If you have defined several variable conditions for fields of the same type, the **Transfer Values to** dialog box opens. Disable the check box next to those fields to which the value you just selected does not apply. Confirm with **Yes**.

   The value is applied to all the selected fields.

   If you select **No**, the value is not transferred to any other fields.

   Note: You determine whether this dialog box should be displayed using the **Transfer values for variable conditions** check box under **Extras** > **Other Options**.

5. Confirm with **OK**.

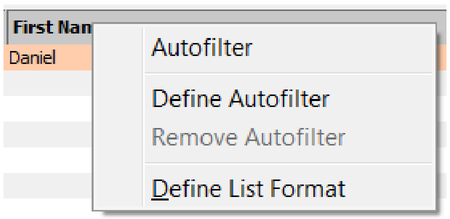
Note: If you activate and deactivate a variable condition multiple times, the values entered in the **Enter Variable Condition** dialog box are retained until you load another condition.

Autofilter

The **Autofilter** option allows you to define conditions in lists quickly and easily.

Below are the steps to define auto filter.:

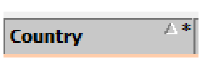
1. Switch to list view.
2. Right click on a column heading. A popup menu is displayed.



3. Select **Define Autofilter**.Different dialog boxes are displayed depending on the field type.
   - If the field is a catalog, a list of the catalog values is displayed. For dependent catalogs, the parent catalog value has to be selected first.
   - For Boolean (logical) fields, you can select between "Yes" (true) or "No" (false).
   - For all other fields, a dialog box is displayed in which you can define a condition. An operator and comparison value can be selected here.

4. Choose the desired values and confirm with **OK**.

   The list now displays data according to the conditions you defined. The **Autofilter** option in the popup menu is displayed with a tick, and an asterisk (*) is displayed in the column.



   If you define criteria for further columns, i.e. fields, the criteria are linked with a logical AND.

To remove an autofilter:

- Right click on the column header and select **Remove Autofilter** from the popup menu.
- Select **Autofilter** from the popup menu to remove the tick and disable the autofilter for all fields.

Note: If you enable an autofilter in addition to active conditions, you are informed that the conditions is removed.

You can also define time ranges using the calendar for date fields. This defines condition with two lines which can only be edited by selecting **Data > Define Conditions** menu option.

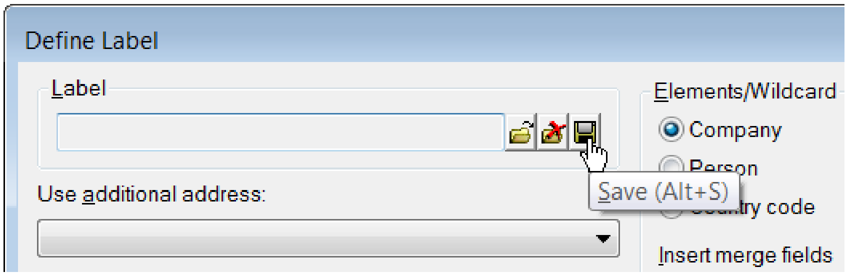
Formats

Settings for a wide range of functions (e.g. analysis settings, print formats, label settings, transfer fields formats) are saved in so-called formats.

Saving, Loading and Deleting Formats

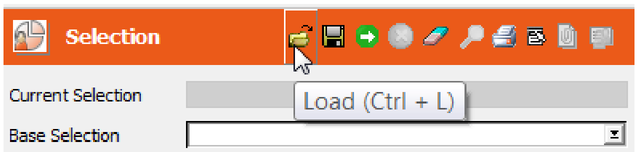
1. After defining settings, click on (**Save**) to save a format.

   Example: Defining labels

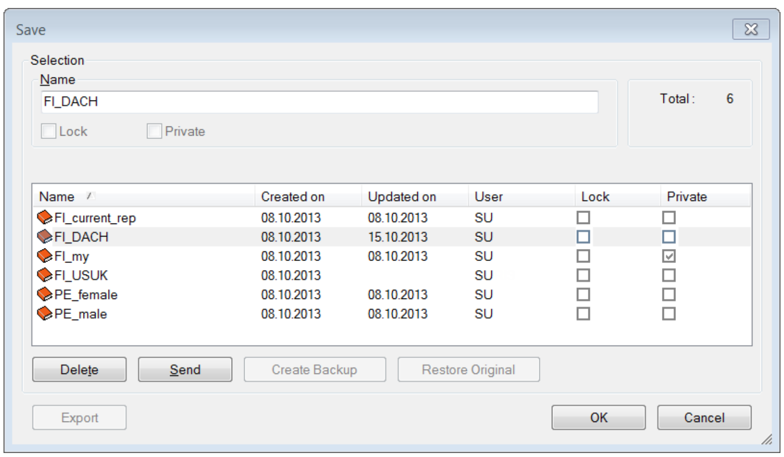


   Click on (**Load**) to load a previously saved format.

   Example: Selection level



2. The following dialog box is displayed (in this case the **Save** dialog box):



- To load a format, select one from the list or enter the first few letters of the desired format in the Name field.
- To save a format, enter the name of the format in the Name field.

Note: Select **Extras** > **Other Options** from the menu. Enable the **Prompt before overwriting formats** check box if you wish to be prompted whenever a format is about to be overwritten.

Conditions and transfer formats can be saved as global formats, in which case they are available to all users, see Global Formats.

If formats are defined on several stations, the name should be unique amongst all stations (e. g. including the name or number of the respective station); otherwise there may be communication difficulties.

- The entries in the **Created on** and **Updated on** columns indicate when the format is first added or last changed.

- You can send the format to other users by clicking on the Send button. Select the desired user(s) in the dialog box that opens, or enable the Select all check box to send the format to all users.
- If you do not want other users to edit a format you created, click on the Lock button or enable the Lock check box.
- If you do not want other users to be able to load a format you created, click on the Private button or enable the Private check box.

Note: You cannot change the **Private** or **Lock** settings of a format when re-saving the format under the same name. You can only change these settings when loading the format for existing formats.

3. Click on **OK**.

Copying Formats

Your administrator (SU) can create copies of a format using the following options:

- Selecting **Create Backup** from the context menu in the **Format** info area.
- Clicking **Create Backup** in the **Load** or **Save** dialog for formats.

The original format's name is changed to include "<T>" at the beginning. The copy is assigned the original name and is used in place of the backup from now on.

The copy is linked to the original format. Only one copy can be created per format.

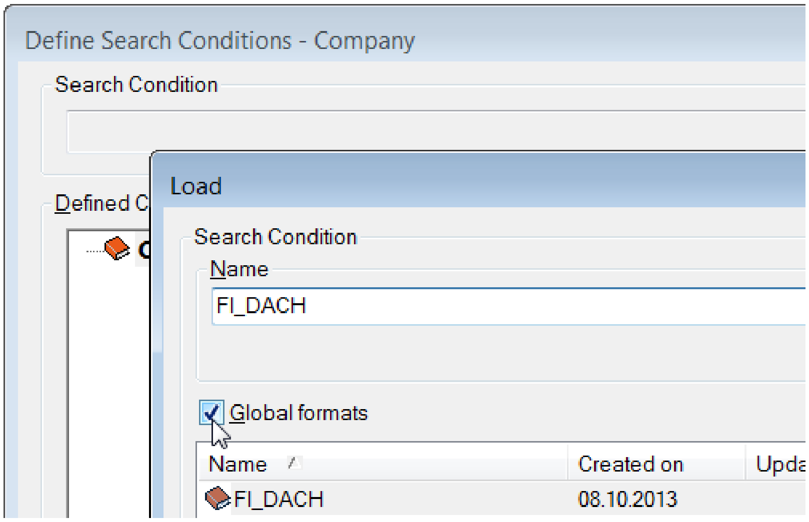
The original format can be restored by selecting **Restore Original** from the context menu or clicking on **Restore Original** in the **Save/Load** dialog. The copy is deleted and the backup is renamed to the original name (the "<T>" is removed).

For more information on managing formats, see *CRM.cockpit User Manual*.

Global Formats

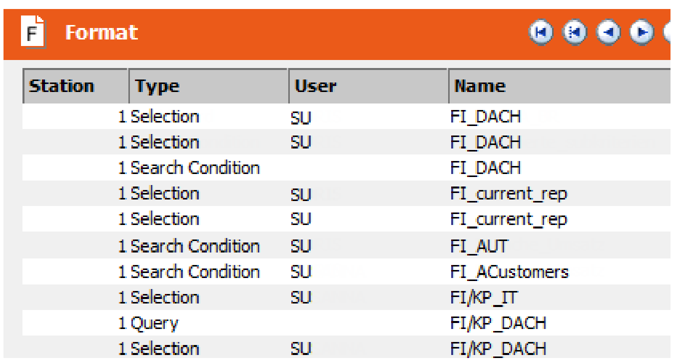
You can save conditions (type "Search Condition") and transfer formats (type "Word processor") as global formats, allowing all users to access them.

Enable the **Global formats** option when saving to save the condition or transfer format as a global format.



When loading formats, enable the **Global formats** option to restrict the list of available formats to just global formats. If you disable the **Global formats** option, only those formats you have defined yourself are listed.

User-specific formats are displayed with the user name in the **Format** info area. No user name is entered for global formats:



Format

Station	Type	User	Name
1	Selection	SU	FI_DACH
1	Selection	SU	FI_DACH
1	Search Condition		FI_DACH
1	Selection	SU	FI_current_rep
1	Selection	SU	FI_current_rep
1	Search Condition	SU	FI_AUT
1	Search Condition	SU	FI_ACustomers
1	Selection	SU	FI/KP_IT
1	Query		FI/KP_DACH
1	Selection	SU	FI/KP_DACH

Viewing and Printing Formats

Formats are created and loaded in the corresponding info areas or dialog boxes (e.g. selection formats in the **Selection** info area). The **Format** info area provides an overview of all formats. For information on the fields in the **Format** info area, refer to the online field help.

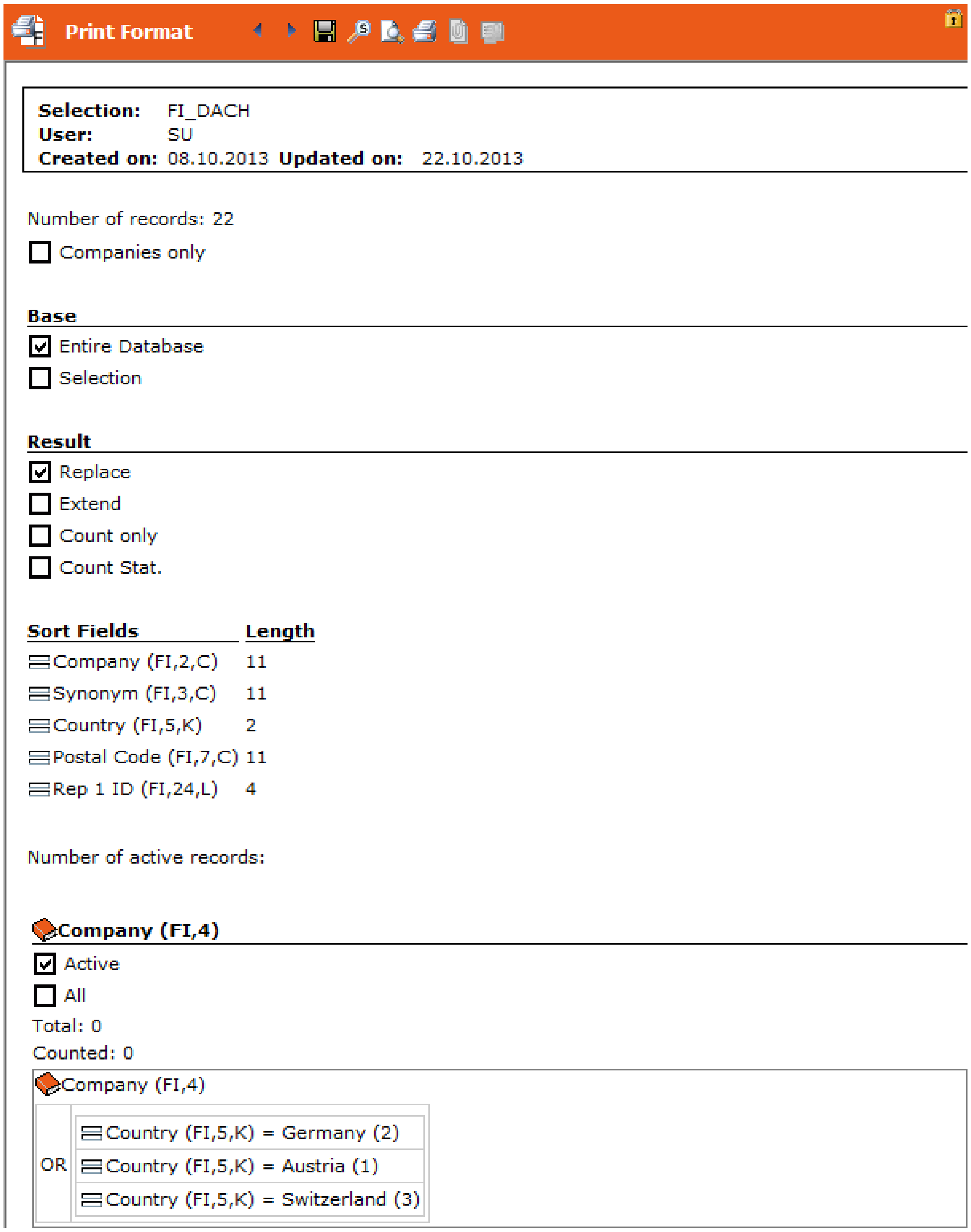
You can display, communicate and search formats. However, you cannot import or export them using the Import/Export module.

You can document important and complex formats (e.g. desktop formats) to help you find errors. The print preview is designed to provide a complete printout for documentation or debugging purposes.

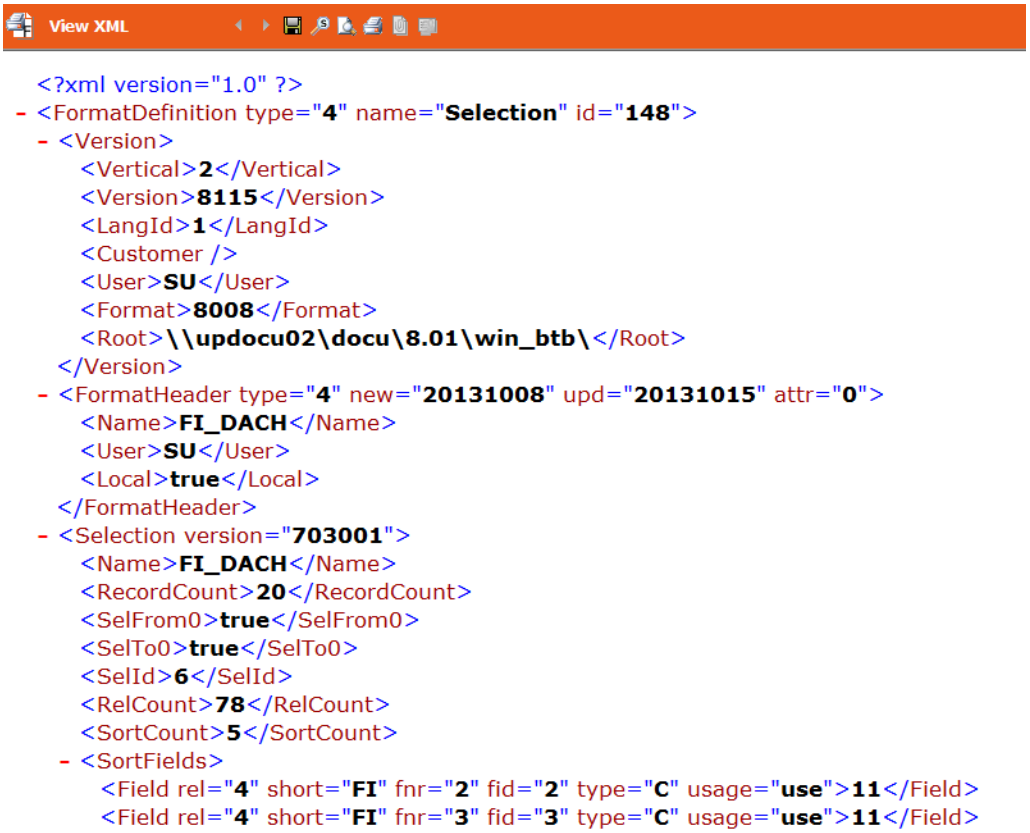
Note: The print and XML views are not available for all format types.

Example: Print preview and XML view of a selection

Right-click on a record in the **Format** info area and select **Print Format** to open the print preview.



Right-click on a record in the **Format** info area and select **View XML** to open the XML view.


View XML


```xml
<?xml version="1.0" ?>
- <FormatDefinition type="4" name="Selection" id="148">
  - <Version>
      <Vertical>2</Vertical>
      <Version>8115</Version>
      <LangId>1</LangId>
      <Customer />
      <User>SU</User>
      <Format>8008</Format>
      <Root>\\updocu02\docu\8.01\win_btb\</Root>
    </Version>
  - <FormatHeader type="4" new="20131008" upd="20131015" attr="0">
      <Name>FI_DACH</Name>
      <User>SU</User>
      <Local>true</Local>
    </FormatHeader>
  - <Selection version="703001">
      <Name>FI_DACH</Name>
      <RecordCount>20</RecordCount>
      <SelFrom0>true</SelFrom0>
      <SelTo0>true</SelTo0>
      <SelId>6</SelId>
      <RelCount>78</RelCount>
      <SortCount>5</SortCount>
    - <SortFields>
        <Field rel="4" short="FI" fnr="2" fid="2" type="C" usage="use">11</Field>
        <Field rel="4" short="FI" fnr="3" fid="3" type="C" usage="use">11</Field>
```


Note: The print preview for workflows does not display all information; it simply provides an overview of the defined parameters and processes.

The following commands are available:

(Back)	Returns to the previous view. Only available in the print preview.
(Forward)	Moves to the next link if you clicked on the **Back** button. Only available in the print preview.
(Save)	Saves the displayed data as an XML file (XML view) or HTML file (print preview). **Note:** The print preview includes picture files saved in Aurea.CRM's "system\xml" directory. To receive the same layout as in Aurea.CRM, save the HTML file in your Aurea.CRM user directory.

(Print Preview)	Displays a print preview.
(Print)	Prints the displayed data.

If a format includes references to another format for which a print preview is available, the name of this format is included as a hyperlink. Click on the hyperlink to switch to this format (answer the prompt with **Yes**). Click on the **Back** button in the level header to return to the original format.

The print preview always outputs text in the current language. The XML view is language-independent.

Exporting and Importing Formats

Reps with the necessary rights can export formats as XML, e.g. export the format from a test system and import it into a live system.

To export a format:

- Click on **Export** in the **Save** dialog for formats.

The format is saved in the current user's user directory using the following file name:

```
<format type>_<format name>_<date>_<time>_<major version>_<service pack>
```

If the format name contains invalid characters, these are replaced by an underscore ('_').

To import a format:

- Click on **Import** in the **Load** dialog for formats.

Only formats of the appropriate type are listed.

Note: The export and import functions are only compatible between databases in which the referenced reps, languages etc. have the same ID. Catalog values are compared using the value in the catalog base language.

The following formats cannot be exported: data model, archive, design, process configuration, user-specific formats and any format for which no XML view is available.

Format Header

The format header displays the same information for all formats:

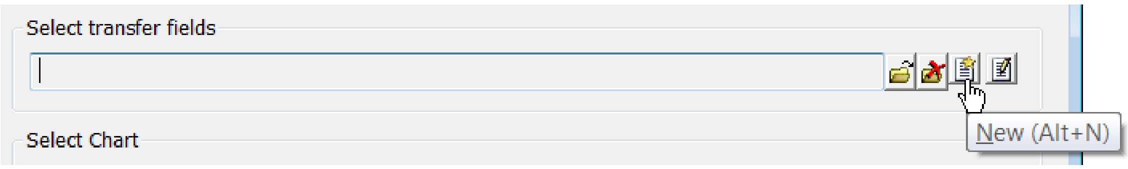
Format Type	The name of the format type precedes the name of the current format.
	This format is locked.
	This format is private.

User	The name of the user who created the format.
Created on	Date the format is created.
Updated on	Date of the last changes to the format.

Transfer Fields

Transfer fields allow you to transfer Aurea.CRM win data to third party products and various internal functions.

Example: You define a report used to transfer data to Microsoft Excel, see Defining Report Formats on page 300. This involved defining a transfer fields format (type "Read Engine") that determines which fields are transferred to Excel by Aurea.CRM win. Click on **New** to create a new format; click on **Load** to load an existing format.



Note: Address labels for mass mailings are created using label formats, not transfer fields, see Defining Label Formats.

Defining Transfer Fields

To define a Transfer field format:

1. Select **Extras > Define Transfer Fields** from the menu. The **Define Transfer Fields** dialog box opens.
2. You can load an existing format using the **Load** button ( ).
3. Select the desired info areas, see Selecting Info Areas.
4. Define the settings for the info areas, see Transfer Fields Settings.
5. Select the desired fields, see Selecting Transfer Fields.
6. Test the format, see Checking the Result.
7. Click **Save** ( ) and enter a name for the format. Confirm with **OK** and **Close**.

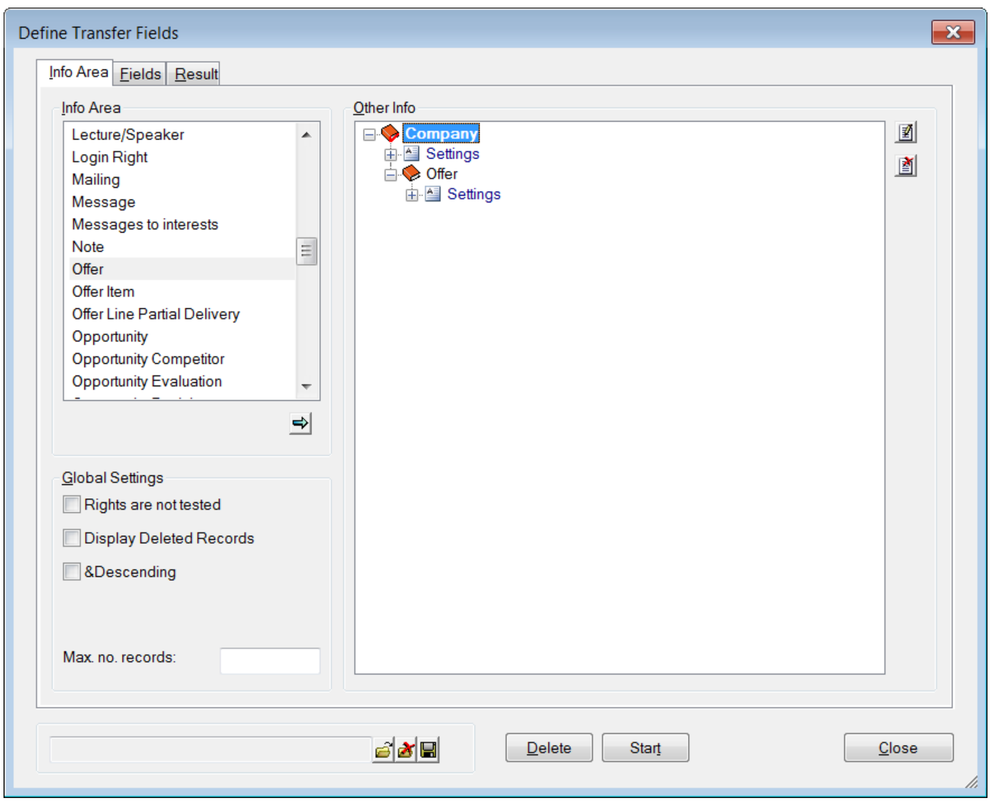
Selecting Info Areas

To select an info area:

1. Switch to the **Info Area** tab.
2. To include fields from an info area in the format:
   - Double-click on the desired info area in the **Info Area** list.
   - Or select the info area and click on (**Add**).
   - You can select multiple info areas by holding down Ctrl whilst clicking in the list.

The selected info area(s) are displayed under **Other Info**.

1. If you click on the icon, the icon is displayed with a red tick. If you now add new info areas, these are added as a child of the other info area. Click on the icon again to remove the dependence, and to add further independent info areas (or dependent on another info area).



The following global options are available:

- **Rights are not tested:** Enable this option to ignore the rights settings specified in the **Rights** module. This option is only available if you have started Aurea.CRM win as the administrator.
- **Display Deleted Records:** Enable this option to transfer records that have been marked as deleted. This option is only available if you have started Aurea.CRM win as the administrator.

- **Descending:** Enable this option to sort the records by descending order.
- **Max. no. records:** Enter the maximum number of records that should be transferred.

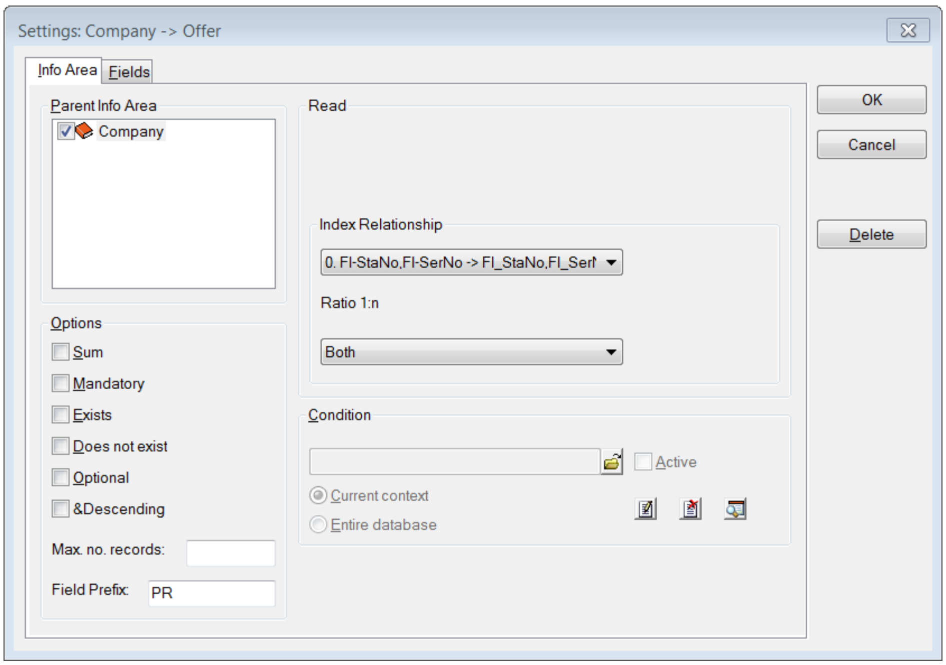
When you add placeholders for fields to the transfer fields format, you need to decide how many dependent records are to be transferred per info area. If you want to use a transfer fields format for the transfer to Excel, the field must remain empty.

Note: You can add up to 64 info areas to a transfer fields format. You can add up to 32 child info areas to a parent info area.

Transfer Fields Settings

To define your settings:

1. Select an info area and click on (**Edit**) to change the settings for the info area.



2. Select the parent info area for the current info area under **Parent Info Area**.
3. Select a key from one of the drop-down lists:
   - The **Index** list is only displayed if no parent info area has been selected in the **Parent Info Area** pane. Select the desired index using the primary and secondary keys of the selected info area.
   - The **Index Relationship** list is only displayed if a parent info area has been selected in the **Parent Info Area** pane. Only the primary key of the parent info area is available.

     The type of relationship (1:n, 1:1, n:m, n:1) between the info areas as well as the type of relationship (person-related, company-related) is displayed below the **Index Relationship** field, if applicable.

4. You can define conditions in the **Condition** pane. You can load an existing set of conditions or define new ones, see Conditions on page 54. Only records that meet these conditions are transferred.

   The **Active** check box is only available once you have defined conditions. Enable the check box to activate the conditions.

5. Determine the type of data you wish to transfer under **Options**. The following options are available:

   - **Sum:** Enable this check box if you only want to transfer fields containing sum totals.
   - **Mandatory:** Enable this check box if a parent record should only be output it a child info area exists.
   - **Exists:** Enable this check box if you do not wish to transfer any data, but wish to test conditions or relationships. Click on the **Edit** icon under **Extended Conditions** to edit the condition (this pane becomes visible once you have enabled the **Exists** check box). You can define conditions applied to sum totals, for example persons with less than 3 activities.
   - **Does not exist:** Enable this check box to prevent records from being transferred if the info area does not exist.
   - **Optional:** Enable this check box to override mandatory conditions for child info areas. There must be several info areas that are child info areas, and the **Mandatory** option needs to be enabled for this option to function.
   - **Descending:** Enable this check box, if the records should be sorted in descending order.
   - **Max no. Records:** As you cannot know the number of child records belonging to a parent beforehand, you need to restrict the number of records when defining the transfer format. Use the **Max no. Records** field to specify how many records per info area are to be transferred to the application.

     Example: You have a format incorporating the **Company** info area as a parent of the **Offer** info area. If you enter a value of "3" in this field for the **Offer** info area, for each company, a maximum of 3 offer records are output.

   - Field Prefix: You can edit the field prefix for the selected info area here. This prefix is transferred to the mail-merge template.

   Note: The field prefix **cannot** begin with the same letters as the original info area abbreviation. **Do not** change the prefix PO to POTENTIAL. You can change the value to lower case (potential), however.

   Examples using **Mandatory, Exists** and **Does not exist** for the **Company** and **Offer** info areas:

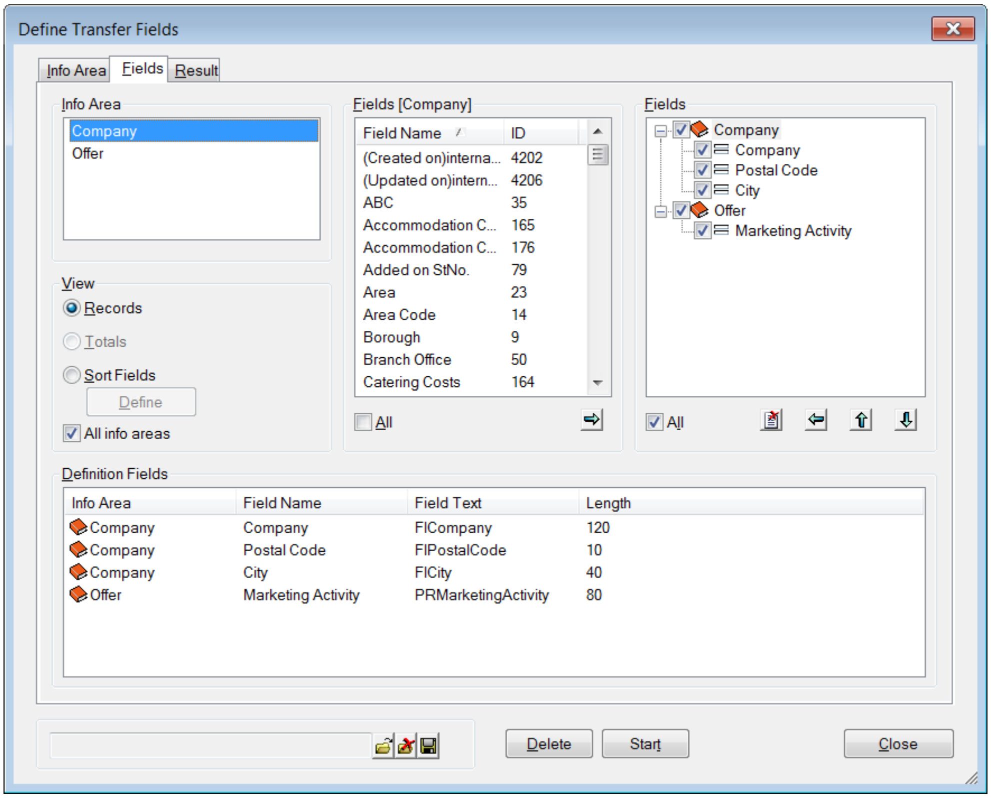
   ---

6. Click on **OK** to confirm your settings.

Selecting Transfer Fields

To select fields:

1. Switch to the **Fields** tab.



2. You can filter the field types you want to define:
   - **Records** - only those fields that contain data
   - **Totals** - only fields containing numbers that can be aggregated (e.g. the costs of activities added for a company can be totaled for the parent company)

   Note: The **Totals** option is only available if a dependent info area is selected.

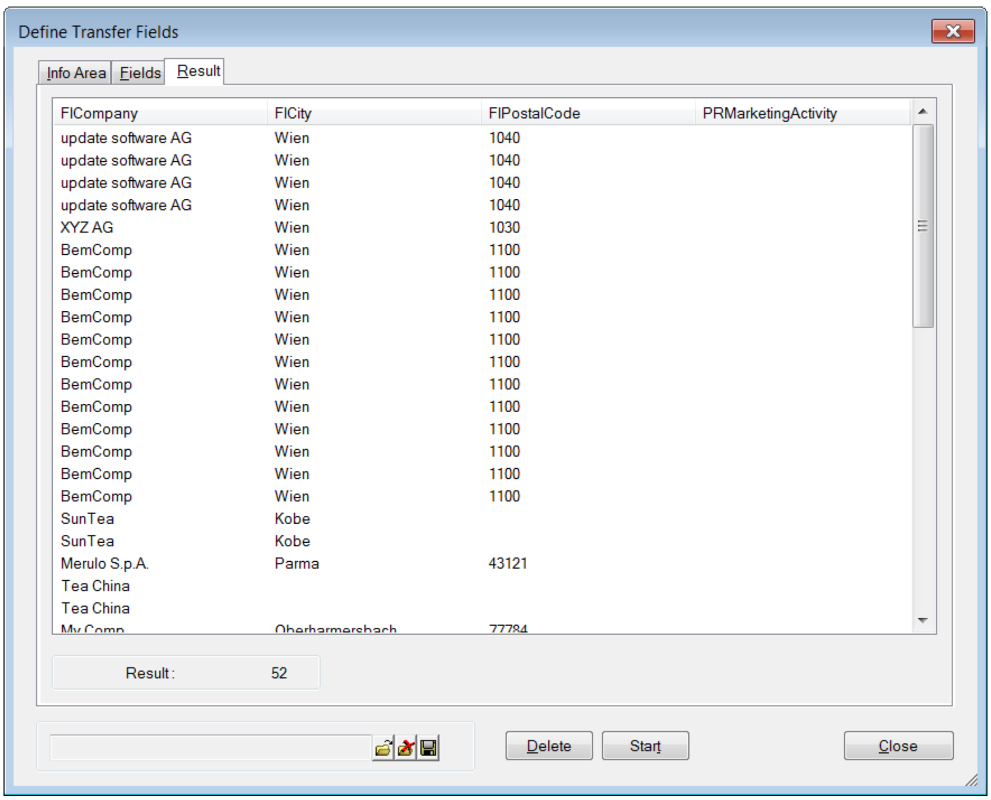
   - Sort FieldsClick on **Define** to determine the field used to sort the records, if you have selected sort fields, see Sorting Records on page 52.
   - Enable the All info areas check box to display the fields from all selected info areas in the list. If the option is disabled, only the fields from the currently selected info area are listed under Fields.
3. The **Info Area** field lists the info areas selected in the **Info Area** tab. Select an info area. The fields in the info area are displayed in the **Fields [Info Area]** list according to the criteria you have selected.
4. Double-click on a field or select it and click on (**Add**)to add the field to the **Fields** list.

   Note: You can also select multiple fields by holding Ctrl and clicking on the fields. Use the **All** check box to select all the fields in the info area.

5. Add all the fields you require.

6. Edit the **Fields** list as necessary:
   - Click on (**Remove unselected**) to remove those fields that are not selected from the list. You can also remove fields by double-clicking on them.
   - You can select all fields in the list using the **All** check box.
   - Disable the check box next to a field to include it in the format without outputting the data from this field.
   - You can delete fields by selecting a field and clicking on the **Delete** button (). If the **All** check box is enabled and no info area or field selected, all fields are removed.
   - Use the **Up** button () to move the selected field upwards.
   - Use the **Down** button () to move the selected field downwards.
7. The selected fields are listed under **Definition Fields**. You can edit the entries in the **Field Text** and **Length** fields.

Checking the Result



Click the **Start** button to display the results. This display is for information purposes only. The number of records that meet the transfer criteria is displayed under **Result**.

Printing

Learn how to print data in Aurea.CRM win.

You can print data in Aurea.CRM win in the following ways:

- From the Aurea.CRM win main module, see Printing Records.
- From the **Print** module, see Print Module on page 87.

Printing Records

1. Switch to list view to print multiple records. If you wish to output all records after a specific record, select the record.

   If you only wish to print a single record, switch to mask view.

2. Select **File > Print**.
3. You can enter a different header for the printout in the **Header** field.
4. To print from the first record in a list, select the **Start with first record** option. Otherwise, the printout starts from the selected record onward.
5. You can enable the **Print mask** option for the **Note** and **Daily Overview** info areas to output data in tabular form. Otherwise the current mask is printed.
6. If you wish to output a specific set of records, define a print format, see Defining Print Formats. Enable the **Print overview** check box and select a format, see Saving, Loading and Deleting Formats. If a format has already been selected, you can load another format using .
7. Click the **OK** button. The Windows **Print** dialog box appears.
8. Select the settings you want and click **Print**.

   Only the current record is printed if you print from the mask view. In list view, either all the records in the info area, the selection you specified beforehand or only certain records are printed.

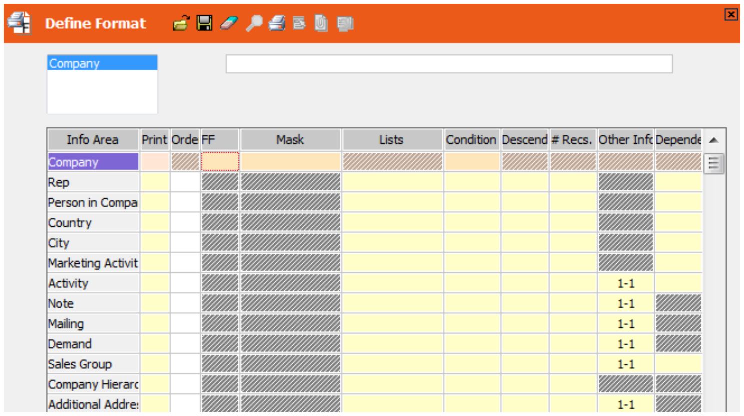
9. Close the **Print** dialog box.

Defining Print Formats

Use a print format to determine which data you wish to print and in what form.

To define a print format:

1. Select **Extras** > **Define Print Format** from the menu.



In the **Info Area** column, the currently selected info area is marked with a bar. All the related info areas are listed below it.

2. Select the info areas you wish to print in the **Print** column. The order in which the info areas are sent to the printer is displayed in the **Order** column. If the info area contains dependent data, the info area is printed in mask form. The dependent data are printed below in list form.
3. The following options are also available from the corresponding columns:
   - **FF:** Specifies after which record a page break should be inserted.
   - **Mask** and **Lists:** Click in the **Lists** or **Mask** cells to select a predefined mask or list format for the printout. All masks and lists defined for the corresponding info area are available. If you do not select a format, the current mask or list used by the info area is used by default.
   - **Condition:** Only data that satisfies the conditions defined here is printed. In addition, the conditions defined under **Data > Define Conditions** for the current level are applied, see Conditions on page 54.
   - **Descend.:** When activated, the records in this info area are printed in descending order.
   - **# Recs.:** Use this column to limit the number of related records printed (e.g. only one person per company). All related records are printed by default.
   - **Other Info:** Use this option if relationships between info areas are not clearly defined. Clicking the cell toggles between two states:

     1-1: Only company-related complementary information is printed.

     1-N: All complementary information is printed (including any person-related data)
   - Dependent: Click in the Dependent cell of an info area to display all info areas dependent on that info area. Click in the Print cell of the dependent info area to print records from the dependent info area as well.

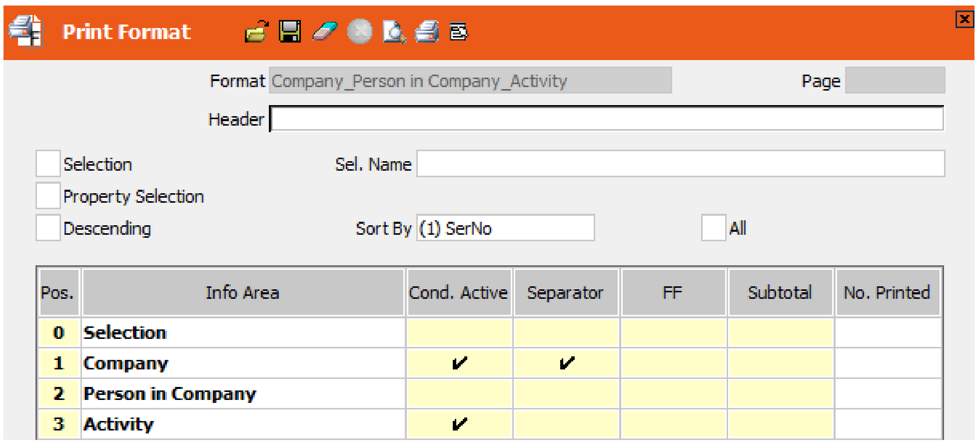
     To return to the corresponding parent level, click on another info area in the small window above the table. If an info area has no children, the cell in the **Dependent** column is shaded.
4. Click (**Save**).
5. Enter a meaningful name for the format and click **OK**.

You can save, load and deny access to formats to specific users, as well as distribute them, see Saving, Loading and Deleting Formats.

Print Module

The **Print** module allows you to generate and print lists. You can print fields from multiple info areas and even program modules.

Start the **Print** module using the  icon or select **Window** > **Modules** > **Print** from the menu.



Printing a list

To print a list:

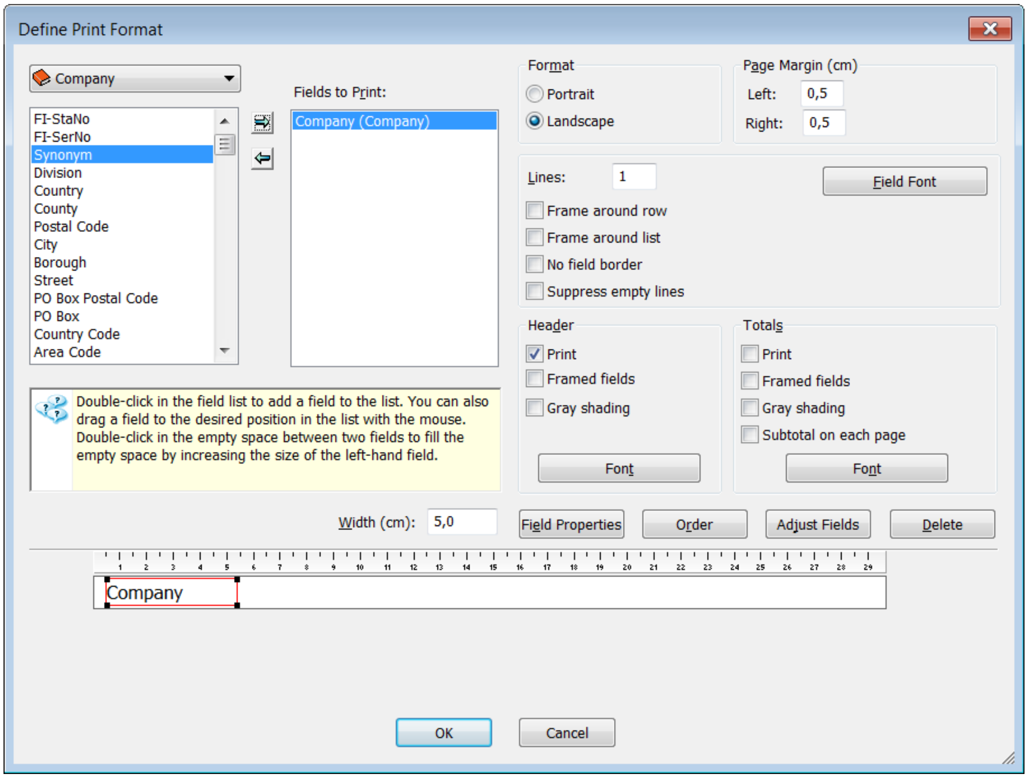
1. Click on **Load** () and select a print format.
2. Select **File** > **Print** from the menu. The standard Windows **Print** dialog box appears.
3. Select the desired settings.
4. Click on **Print** to start the printout.

Defining a Print Format

To define a print format:

1. Enter the list header in the **Header** field.
2. Select **Define Format** from the context menu or **Data** > **Define Format** from the menu.

   The **Define Print Format** is displayed.



3. Use the drop-down list at the top left to select the info area(s).

   All fields available in the selected info area are displayed below.

4. Use the arrow buttons or double-click to add and remove fields from the list of **Fields to Print**. Add fields in the order you wish to print them.

Note: Double-click a field in the **Fields to Print** list box to delete it. You can change the order of the info areas later. The field order can be edited in the preview .

---

5. Enter the format details, see **Formatting the Printout**.
6. Click **OK**.

   The table now displays the info areas that you have selected fields from.

The following information is displayed:

- Pos.: The order of the info area, as specified in the Define Print Format dialog box using the Order button. You can edit these values in the table.
- Info Area: Name of the info area in the print format.
- Cond. Active: Click on the cell to open the Define Search Conditions dialog box, where you can define conditions for this info area. You can also define conditions by selecting Data > Define Conditions from the menu. You can disable conditions by clicking in the corresponding cell or selecting Data > Define Conditions from the menu. The Cond. Active cell is automatically enabled if a selection is chosen that contains a condition applied to the info area.
- Separator: Generates a dividing line at the end of a record.
- FF: Generates a page break after the info areas of your choice.
- Subtotal: If your info area also includes numerical fields, you can generate a subtotal at the end of each info area.
- No. Printed: Number of records printed for this info area.

  You can disable conditions by clicking in the corresponding cell or selecting **Data > Define Conditions** from the menu.

  The **Cond. Active** cell is automatically enabled if a selection is chosen that contains a condition applied to the info area.

7. The following options are also available:

- **Format:** After you have saved or loaded the settings, the name of the print format you want to print appears in the **Format** field.
- **Header:** Specify the list header in the **Header** field.
- **Selection:** Enable the **Selection** check box to choose a selection, see Selections on page 93.

  The selection is loaded and the name of the selection is displayed in the **Sel. Name** field.

  The **Cond. Active** cell is enabled for the corresponding info area(s) to indicate that conditions are active.

  The **Selection** info area appears in the first row of the print table (Pos. 0). You can then define conditions for the selection:

  Define the following condition to filter out records added to the selection manually: condition "Manual <> empty" (delete the existing entry, i.e. no entry as a comparison value).

  Define the following condition to filter out records in the selection that have been marked: condition "Marked **<>** empty" (delete the existing entry, i.e. no entry as a comparison value).

- Property Selections (BTB only): Enable this check box to choose a property selection.
- Sel. Name: Name of the current selection file. Double-click on this field to load a selection. You can disable a loaded selection by disabling the Selection check box. o Descending: Enable this check box to sort data in descending order.
- Sort By: You can determine the criteria used to sort the printout.

Double-click in the **Sort By** field to call up the available sort fields.

The sort fields in the info area placed at **Pos. 0** are displayed. The order of the info areas is defined using the **Order** button in the **Define Print Format** dialog box. The order can also be altered by directly editing the **Pos.** field.

- All: Determines whether the company/person should only be printed if at least one record satisfies the condition.

  Example: In the **Activity** info area, you define the condition "Marketing Activity = Offer". If the **All** check box is enabled, all persons or companies with at least one activity record containing the field "Marketing Activity = Offer" are printed.

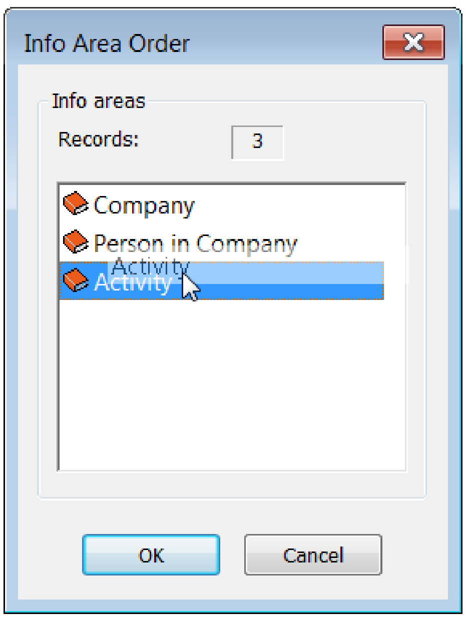
  If the check box is disabled, all persons or companies are printed, regardless of whether they have any activity records containing the field "Marketing Activity = Offer".

8. Click on (**Save**) to save the print format.

Changing the Info Area Order

If you have selected fields from multiple info areas, you need to determine which info area to sort fields by, i.e. you need to determine an order for the selected info areas.

1. Click the **Order** button to open the **Info Area Order** dialog box.



2. Use the mouse to drag the info areas to determine the order.

If, for example, the **Activity** info area is now in first position, you can sort the list using the criteria from that info area (e.g. **Type**, **Starts on**, etc.).

The order of the info areas also affects the access to the data to be printed.

Example:

- **Person in Company** condition: **Position** = "managing director"

Info area order: **Company**; **Person in Company**

All companies are printed, but only those persons that satisfy the condition (top-down approach).

- **Person in Company** condition: **Position** = "managing director"

Info area order: **Person in Company**; **Company**

Only those companies containing a person who satisfies the condition are printed (bottom-up approach).

You can edit the info area order after closing the dialog box by changing the value in the **Pos.** (position) field in the print table.

Formatting the Printout

The right half of the **Define Print Format** dialog box contains a series of check boxes:

- **Format:** Select the orientation of the printout.

Note: If portrait format is enabled on the default printer, you can only print in landscape format if you confirm landscape format using the print setup.

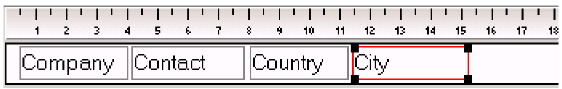
- **Page Margin (cm):** This is used to specify the distance between the list and the margins, in cm.
- **Lines:** Enter the number of lines used to print the fields and contents of a record.
  - **Frame around row:** Each row is printed with a frame.
  - **Frame around list:** The complete list is printed with a frame.
  - **No field border:** Fields are printed without a border.
  - **Suppress empty lines:** Blank lines resulting from missing records are not printed.
  - **Field Font:** The font attributes for the lines are defined here.
- **Headers:**
  - **Print**: Enables or disables the printout of the header (Aurea.CRM win program field designation).
  - **Framed fields**: The header fields are printed with a frame.
  - **Gray shading**: The header is printed with a gray background.
  - **Font** button: The font attributes can be defined by pressing this button.
- **Totals:**
  - **Print**: If numerical fields have been integrated in the list, a final total is printed at the end of the list.
  - **Framed fields**: The totals fields are printed with a frame.
  - **Gray shading**: The totals fields are printed with a gray background.
  - **Subtotal on each page**: A subtotal is printed at the end of each page.
  - **Font** button: Click on this button to define the font attributes for totals.
- **Width (cm):** Enter the width of the currently active field.

Note: Dragging a field border in the list line changes this value as well, see **Preview** below.

- **Field Properties:** Opens the **Field Properties** dialog box, see below.
- **Order:** Opens the **Info Area Order** dialog box, see **Changing the Info Area Order** above.
- **Adjust Fields:** Places all the fields in the preview next to one another and deletes any spaces between them.
- **Delete:** Deletes all the fields from the **Fields to Print** list box.

Preview

Once you have selected the fields they are visible in the current order in the preview. You can edit the fields in the preview:

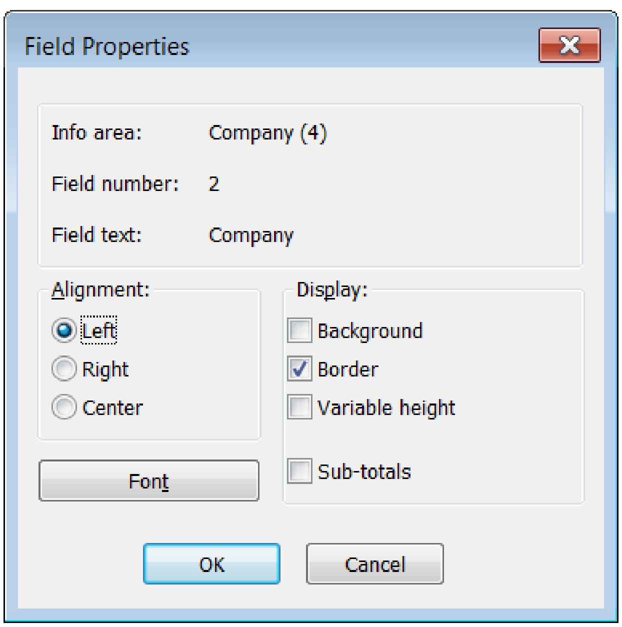


- Drag a field to reposition it.
- Drag an edge or corner to resize a field. The current field width is indicated in the **Width (cm)** field, and can be edited there as well.
- Double-click on a field to change the **Field Properties**, see below.
- Right-click on a field to delete it from the list.

Field Properties

You can specify how each field should appear in the list.

1. Click on the **Field Properties** button or double-click the corresponding field in the preview to open the **Field Properties** dialog box.



The dialog box displays the name and number of the **Info area**, the **Field number** and the **Field text**.

2. Select the desired options.
3. Click on **OK**.

The following options are available:

- **Alignment:** Determines whether the field contents are aligned to the left, the right or centered.
- **Display:** Determines the graphical attributes of the field.
  - **Background**: Fields are shaded
  - **Border:** Fields are separated with a border
  - **Variable height:** The height of a row adapts to the field contents
  - **Sub-totals:** Subtotals are output for numerical fields.
- **Font:** Click on the **Font** button to determine the font type and size for the field.

Selections

Selections contain references to companies and persons that meet one or more conditions.

For further details, see Conditions.

It can be used as the basis for marketing activities, mass mailings etc.:

- Selections (including conditions) are defined in the Selection info area, see Defining a Selection on page 94.
- The selection then needs to be generated, see Generating a Selection on page 104.

Note: The selection contains references to those records that meet the conditions at the time the selection is generated. The selection is not updated until it is generated again. This means that companies and persons in the selection may no longer meet the initial criteria defined when first generating the selection.

- You can display the selection and edit companies/persons in the selection, see Displaying or Editing Selections on page 104.
- You can extend selections and create unions and intersections of selections, see Combining Selections on page 107.
- You can generate the selection at regular intervals, see Automatic Selections on page 111.

The BTB version also includes property selections (context menu option Selection in the Property level).

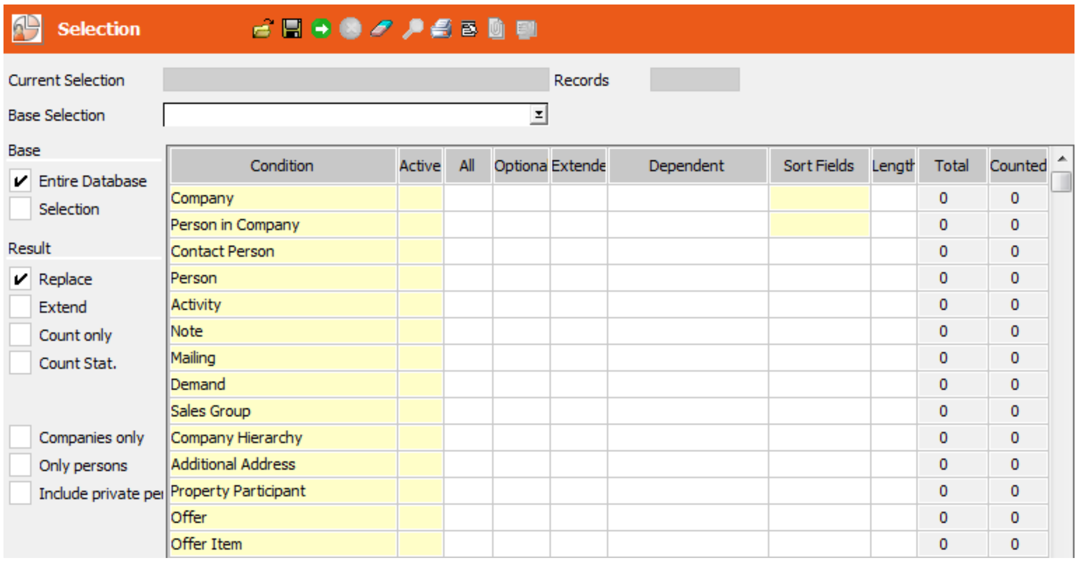
Defining a Selection

Learn how to define selection.

To define a selection:

1. Click the **Selection** icon in the icon bar or select **Info** **Selection**.

   The **Selection** level is displayed.



2. The following options are available under **Base** and **Result**:

   - Select the **Entire Database** and **Replace** options to use the entire database as the basis for your selection. Any existing records in the selection are removed, and the selection is created anew.
   - Select the **Entire Database** and **Extend** options to use the entire database as the basis for your selection. The existing selection is extended to include those records that meet your conditions.
   - If your selection already contains companies/persons, you can also select the **Selection** and **Replace** options. The companies/persons that no longer meet your conditions are removed from the selection.

     For further information on these options, see Combining Selections on page 107.

3. Determine which records should be included in the selection:
   - **Companies only:** The selection only contains company records.
   - **Persons only:** The selection only includes records in the **Person** (PE) info area that are linked to at least one record in the **Contact Person** (CP) info area.
   - **Include private persons:** The selection includes person records in the **Person** (PE) and **Person in Company** (KP) info areas.

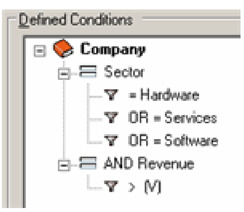
     Enable **both Include private persons** and **Persons only** to include **all** records in the Person (PE) info area that meet the conditions, including those not linked to a record in the **Contact Person** (CP) info area.

     If neither **Persons only** nor **Include private persons** are enabled, only those records in the **Person in Company** info area are included in the selection.

4. Click on an info areain the **Condition** column and select a field.
5. Define the condition that needs to be met by records in the selection, see Defining Conditions on page 55.

   Example: All companies in the hardware, service and software sectors with revenue greater than a variable amount.

   Note: Variable conditions can be changed when generating the selection, see Defining Variable Conditions on page 63.

   Note: You can save the conditions, although this is not strictly necessary within the scope of selections.

   ---

6. Click in the **Active** column of an info area to activate the condition.
7. You can define conditions for any number of info areas (including info areas dependent on companies and persons), see Conditions Applied to Multiple/Dependent Info Areas.
8. You can determine how records in the selection are sorted, see Sort Options.
9. You can count the number of records and display an overview of the conditions, see Statistics and Overview.

10. You can define complex conditions in the **Extended Cond.** column, see Extended Conditions on page 99.
11. Generate the selection and save it, see Generating a Selection on page 104.

Alternatively, click on (**Save**) to save the selection. Use (**Load**) to reload the selection and continue editing at a later date.

Conditions Applied to Multiple/Dependent Info Areas

You have the following options if you have defined conditions for several info areas:

- **All:** All dependent records must meet the condition. If the cell is not activated, at least one record must meet the conditions.

Example: The condition "Type = Telephone" must be met by all activities stored for a company/person; no other types of activities may be present.

- **Optional:** Enable this cell for several rows to determine that the conditions in those info areas are combined with using a logical OR.

If you only enable the cell for a single info area, this only has an effect in conjunction with the **Dependent** column (see below).

- **Dependent:** Click in this cell to choose between the following options for company-dependent and person-dependent info areas:

Example: Activity

Condition	Active	All	Optiona	Extende	Dependent
Company					
Person in Company					
Contact Person					
Person					
Activity	✔				Company
Note					

Company: The selection contains:

- All persons where at least one company-related activity exists (regardless of whether person-related activities exist or not)
- and all companies without any persons for which a company-related activity exists.

Person: The selection contains:

- All persons for whom at least one person-related activity exists (regardless of whether activities exist for the person's company).
- If you enable Optional as well, companies without persons are also included in the selection.

Person OR Company: The selection contains:

- All persons for whom at least one activity exists
- and all persons where at least one activity exists for the company
- and all companies without any persons for which a company-related activity exists.

Both: The selection contains:

- All persons where at least one activity exists for their company
- and all persons where an activity exists for at least one colleague (a person in the same company)
- and all companies without persons with a company-related activity.

Sort Options

To sort the companies or persons in your selection:

1. Click in the **Sort Fields** cell for the **Company** or **Person** info area.

   The **Field Selection** dialog box is displayed.

2. Select one or more fields used to sort the records.
3. Click **OK**.

Sort Fields	Length
FI:County	17
FI:Company	17
KP:Last Name	16

   The **Length** column indicates the number of characters used to sort the records. The maximum available length is 50 sort characters. If you select several sort criteria, these 50 characters are distributed amongst all fields.

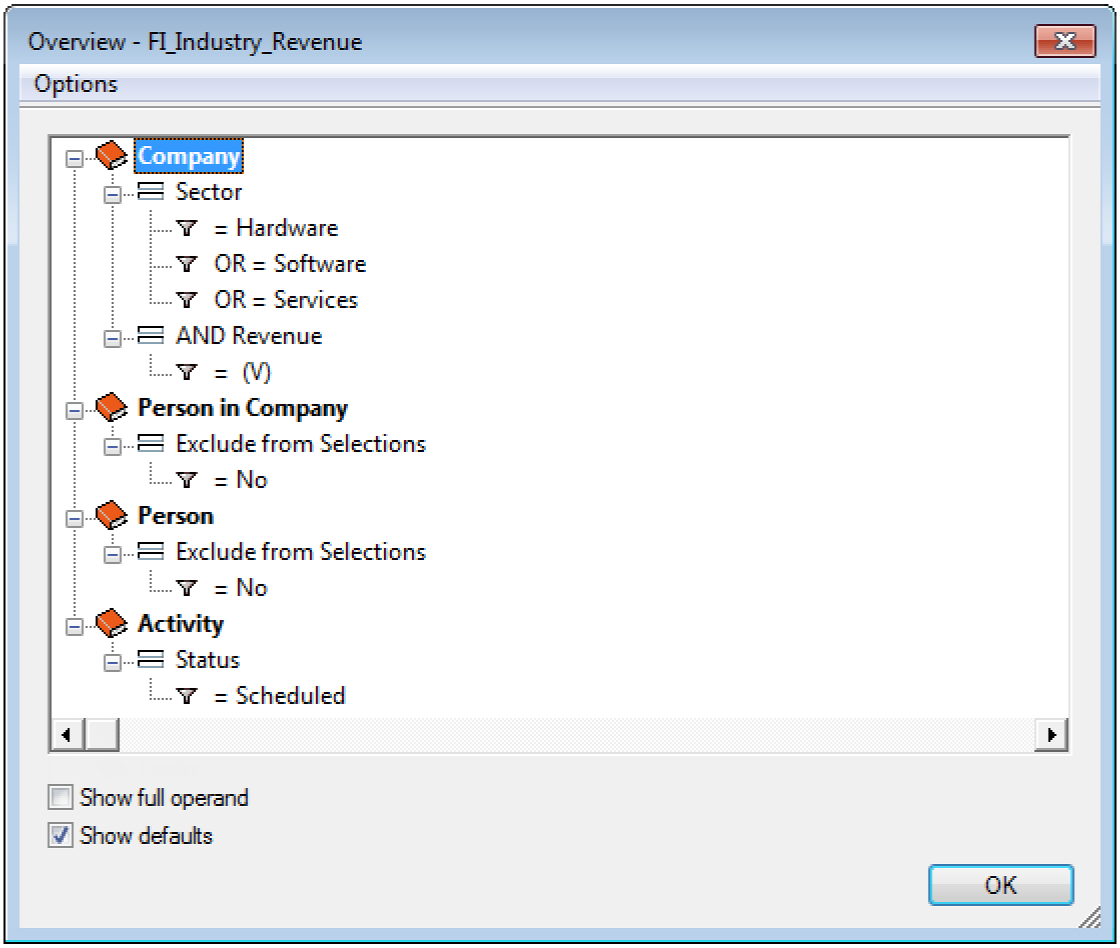
4. Click in the **Length** cell to edit the number of sort characters.

   Note: If you sort catalog values, they are sorted by catalog code and not by content.

   Select **Sort** from the context menu to sort the records in the selection without updating the selection itself.

Statistics and Overview

- Use the following options under **Result** to count the number of records when clicking on (**Execute**) instead of generating the selection:
  - **Count only**: The number of records in the selection is counted. This selection cannot be saved.
  - **Count Stat.**: All the records that satisfy the defined conditions are counted and displayed in the **Counted** column. If you have not defined any conditions for an info area, all records in the info area are counted.
- **Total:** Select the **Total** option from the context menu to display the number of records that meet the defined conditions in the **Total** column. If no conditions have been defined, then all records in the database are counted.
- **Overview:** Select **Overview** from the context menu to display an overview of all conditions defined for all info areas.



Select **Options** > **Print** from the menu to print the overview.

Special Case - Selecting Companies/Persons using Property Criteria (BTB only)

You can select persons and companies whilst defining criteria for properties these persons or companies are involved with. The **Property** info area is included in the **Selection** level for this purpose, although the **Property** info area itself is neither company nor person-dependent.

Example: Property: Country = Austria and Project Status = In progress.

The result of the selection is all companies/persons involved in properties in Austria that are currently under way.

Note: If you define conditions for properties as well as participants (e.g. **Property:** Country = Austria and **Part. Parties**: Participation = Architect), all companies/persons entered as architects (irrespective of the country the property is in) and also involved in properties in Austria (irrespective of the type of participation) are included in the results.

Excluding Records from Selections

Use the **Exclude from selections** field to exclude companies and persons from selections, i.e. those records where this field is enabled are not included in selections even if they meet the selection criteria.

Note: Companies are only excluded from selections if you enable a condition applied to the **Company** info area in the selection. The same applies to records in the **Person in Company** info area - the field only has an effect if the **Person in Company** info area is activated in the selection. Excluding a company from selections does **not** exclude the persons in that company from selections.

Extended Conditions

You can define extended conditions in addition to simple conditions.

Extended conditions can contain complex expressions and functions. "Normal" and "extended" conditions for an info area are combined using a logical AND. This link cannot be changed to an OR.

Examples for extended conditions:

- Revenue / Employees >= 150000
- (Discount % / 100) * Value > 1000
- Oldest activity <= 01.07.2012
- Company name = Up*
- Sum total of all activity costs <= 1000
- Total number of activities < 10
- Earliest activity = Visit OR Telephone

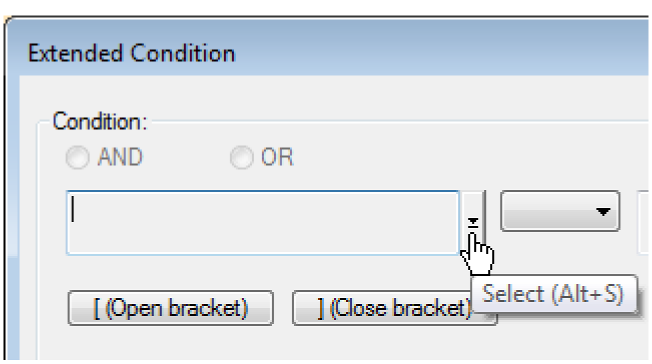
Defining Extended Conditions

To define an extended condition:

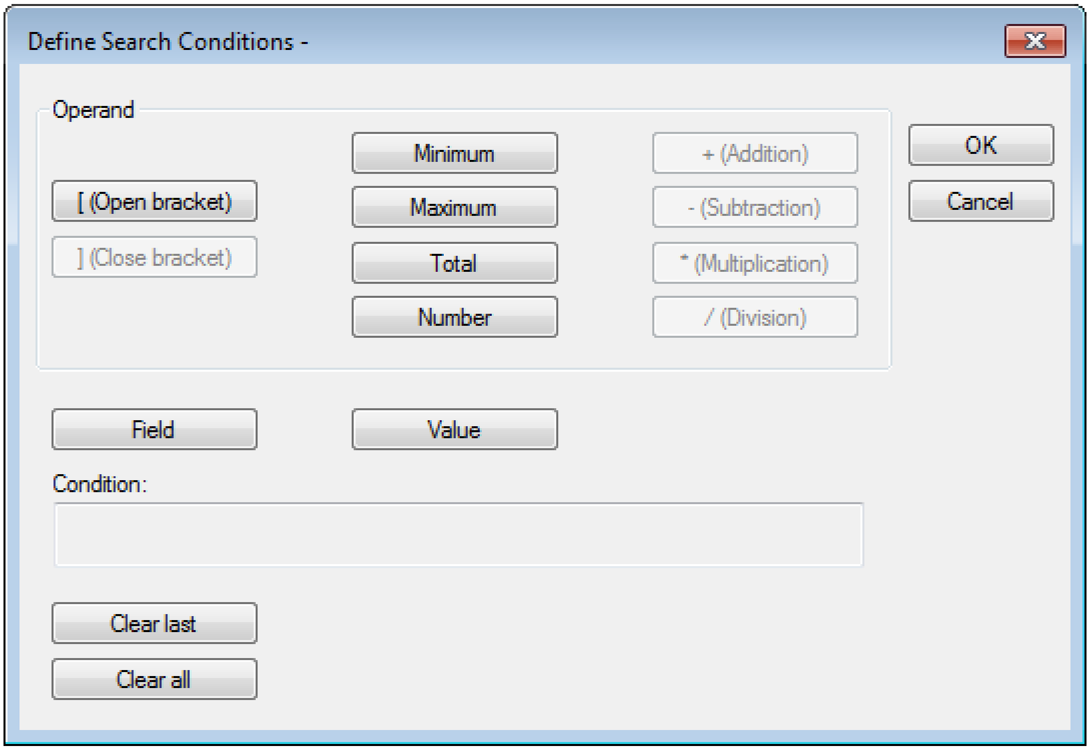
1. Click the **Active** cell of an info area.
2. Click the **Extended Cond.** cell of the same info area.

   The **Extended Condition** dialog box is displayed. You can define one of more conditions consisting of a left expression, a comparison operator and a right expression.

3. Click (**New**) to define the left expression in the first condition. You can also double-click in the top left field or click the small arrow.

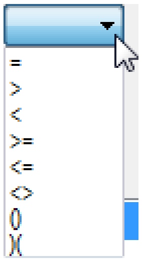
   The **Define Search Conditions** dialog box is displayed.



4. Use the buttons to define your expression:
   - Click on **Field,** select a field, and confirm with **OK**.
   - Click on **Value**, enter a value, and confirm with **OK**.
   - Click on **Minimum, Maximum, Total** or **Number**, see Minimum, Maximum, Total, Number.
   - Use the **Addition, Subtraction, Multiplication** and **Division** buttons combine (numeric) fields using mathematical expressions. Only subtraction and addition are available for date fields.

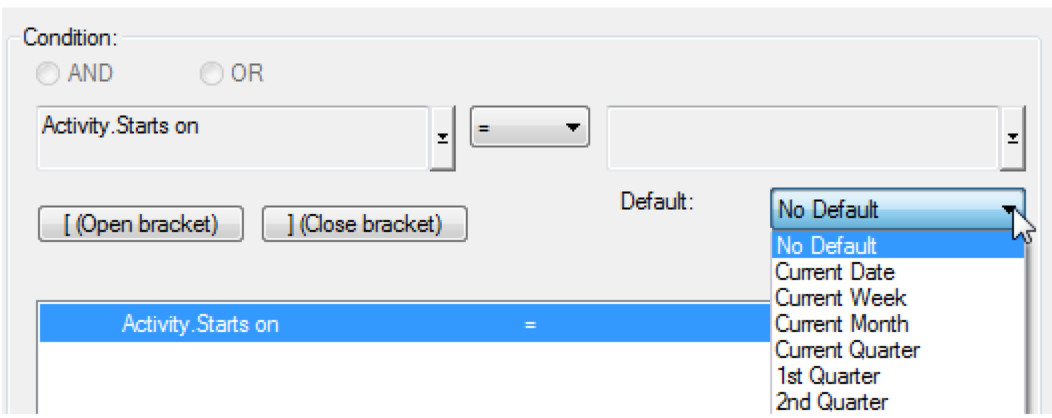
     If you make a mistake, you can correct it by clicking the **Clear last** button. The **Clear all** button deletes the entire line.

5. Click **OK**.
6. Select an operator from the central drop-down list in the **Extended Condition** dialog box.



- =: The left and right expressions must match exactly. You can use wildcards to search for partial strings, e.g. FI.Company = upd*..
- <, <=, >, >=: The left expression must be less than, less than or equal to, greater, or greater or equal to the right expression. Text values are compared alphabetically, e.g. "Company > V*" is met by all companies whose names begin with W, X, Y or Z.
- <>: The left and right expressions must not match exactly.
- (): The left expression contains the right expression.
-)(: The left expression does not contain the right expression. If you have included a date field in the left expression, you can select

If you have included a date field in the left expression, you can select a date function for the right expression.

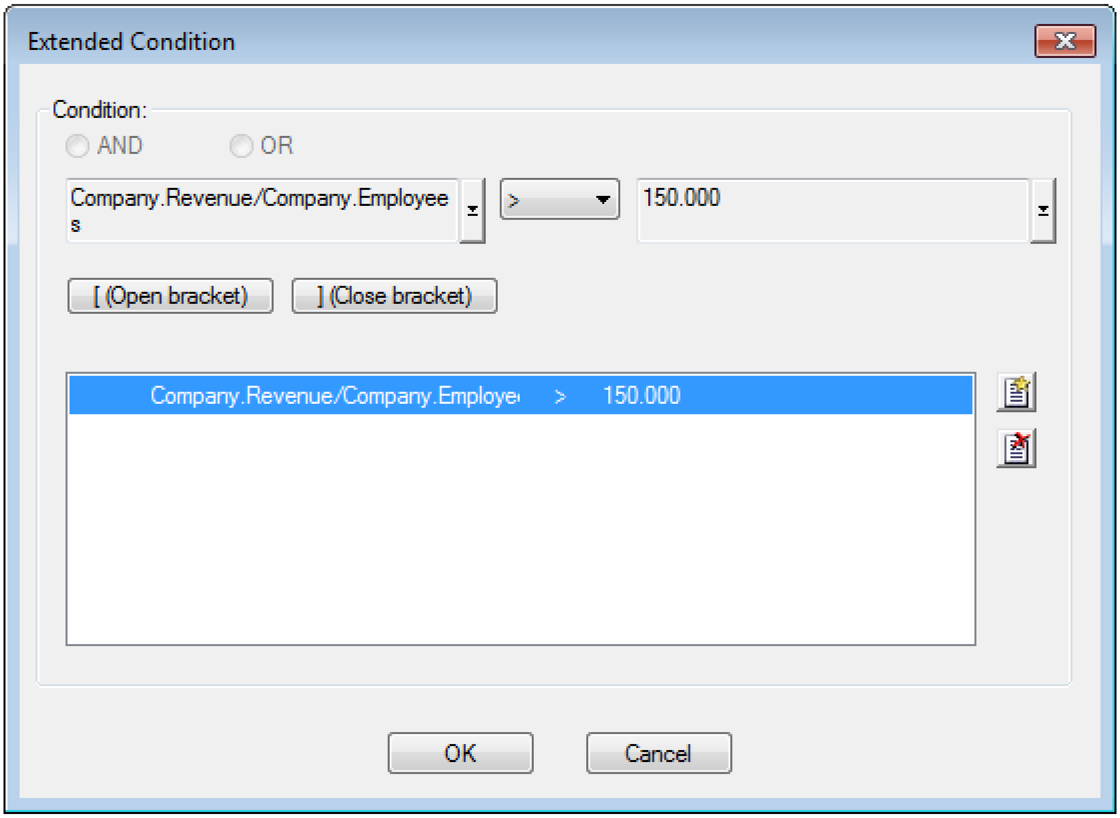


7. Define the right expression.

   Fields of the same type as selected in the left expression can be selected.

   - For date fields: Date fields or numerical fields. You can add days to or subtract days from the current date.
   - For catalog fields: The associated catalog values. You cannot select more than one catalog value.
   - For alphanumeric fields: All field types.
   - For numeric fields: Numerical fields.

8. Click **OK**.



9. Click on  (**New**) to define further conditions:

- **AND / OR:** Use these radio button to determine whether to link conditions using a logical AND or OR.
- **Open bracket / Close bracket**: If necessary, you can include brackets in the condition. You can only use one set of brackets for each sub-condition.

  If you link sub-criteria without brackets using AND in an independent info area, the condition is only satisfied if at least **one** dependent record satisfies the first sub-criteria **and** at least **one** dependent record satisfies the second sub-criteria.

  Example: Activity.Type = Telephone AND Activity.Priority = high: The selection contains all companies for which at least one telephone activity and at least one high priority activity exists.

  If you enclose the sub-criteria in brackets, the condition is only then satisfied if at least **one** dependent record satisfies **both** sub-criteria.

  Example: (Activity.Type = Telephone AND Activity.Priority = high): The selection contains all companies for which at least one high importance telephone activity exists.

10. Click **OK** to close the dialog box.

Minimum, Maximum, Total, Number

Using these functions, you can include the highest or lowest values, sum totals and number of records in your expressions:

- **Minimum:** The record with the smallest value (for date fields the oldest date)
- **Maximum:** The record with the greatest value (for date fields the most recent date)

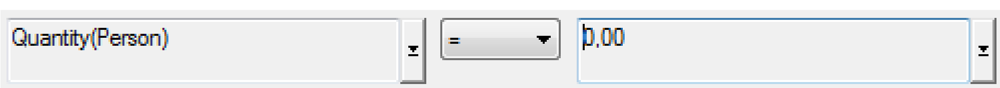
Example: The most recent activity record of type "Visit" for all companies.

1. Define an extended condition for the Activity info area.
2. Click on Maximum when defining the left expression.
3. Select the Starts on field. The Minimum /Maximum Input dialog box is displayed.
4. Under Use field, select the Type field.
5. Click OK.
6. Click OK to close the Define Search Conditions dialog.
7. Select the "=" operator.
8. In the right condition field, select Visit.
9. Click OK.

- **Total:** Returns the sum total of numerical fields, for example, the total of activity costs > 1000. The costs for each company/person are added up.
- **Number:** Number of records that satisfy the condition.

Example: All company records without persons:

1. Enable the Companies Only check box in the Selection info area.
2. Define an extended condition for the Person in Company info area.
3. Click on Number when defining the left expression. The Person in Company info area is displayed under Info Area in the Field Selection dialog.
4. Click OK.
5. Click OK to close the Define Search Conditions dialog.
6. Select the "=" operator.
7. Enter "0" (zero) as the right expression.
8. Click OK.



Generating a Selection

Learn how to generate selection.

You need to generate a selection in the following cases:

- **Upon defining the selection**: Selections are initially empty. Companies/persons are only added to the selection based when the selection is generated. Those records that meet the conditions at the time of generation are included.
- **When updating a selection**: Selections are not updated automatically. If you have added or edited records since the last time the selection was generated, and wish the selection to reflect the current state, you need to generate the selection again to update it.

To generate a selection:

1. Click the **Selection** icon in the icon bar or select **Info > Selection**.
2. If the selection is not displayed under Current Selection, click on (**Load**) to load the selection.
3. Click (**Execute**).

   Note: If the selection contains variable conditions, the **Enter Variable Condition** dialog box is displayed, allowing the conditions to be edited before the selection is started, see Variable Conditions With User Input on page 68.

   The number of selected records is displayed in the **Records** field.
4. Save the selection.
5. You are asked if you want to edit the selection.
   - If you answer **Yes**, the **Company+Person** or the **Person** level is opened with the selected companies/persons.
   - If you click on **No**, you remain in the **Selection** level.

Displaying or Editing Selections

You can display, sort and edit the records in a selection, as well as send the selection to other users.

Displaying Selections

To edit a selection:

1. Switch to the desired level (**Company+Person**, **Person** or **Property** (BTB only)).
2. Select **Data** > **Selection** from the menu.
3. Choose a selection and confirm with **OK**.

Note: Selections are user-specific. You can only use a selection defined by another user if you are sent the selection.

The records in the selection are displayed. The name of the selection is displayed in the title bar.

Note: Provided your administrator has configured this feature, you can load selections directly via a drop-down list, >> **Button Properties** in the Aurea.CRM win Administrator Guide. The drop-down list contains the following entries: blank entry (return to the entire database), available selections, "Selection" entry (switch to the **Selection** level).

If you have loaded a selection, you cannot use the **Data** > **Sequence** or **Data** > **Sort by** menu options. The sort options are defined in the selection itself, see Sort Options.

4. Select **Data** > **Define Conditions** to further restrict the selection. This only limits the records that are displayed; the selection itself is not affected.
5. To exit the selection and return to the database, select **Data** > **Entire Database.**

Editing Selection Data

To edit records in a selection, load the selection, see Displaying Selections.

You can edit records in the selection as follows:

- To add a record to the selection:
  1. Click on (**Find**) or on (**Person in Company**).

     You are prompted to confirm that the record should be added to the selection.
  2. Confirm with Yes.

     The record is displayed in the selection list.

     If you answer **No**, you are automatically returned to viewing the entire database and the record is highlighted.

- Use the (**New**), (**Edit**) und (**Delete**) buttons to add, edit or delete a record:
  - New: New records are added to the database and saved in the selection as well. The Manual field is enabled for the record in the selection (visible by selecting View > All Mask Fields from the menu).
  - Edit: Changes to records in the selection affect the record in the database.
  - Delete: Deleting a record removes the record from the selection, but not from the database.

To delete records at once:

1. Use (Mark) or Ctrl+Insert to mark the desired records. Use or Ctrl+Insert a second time to unmark a record.
2. Select Edit > Delete Marked Records from the menu to remove all marked records from the selection. Alternatively, select Edit > Delete Unmarked Records to remove all unmarked records from the selection.

   Alternatively, select **Edit > Delete Unmarked Records** to remove all unmarked records from the selection.

   Note: Records are removed from the selection, but are not deleted from the database.

Note: If you use a selection to generate a marketing activity, you can choose to use the marked or unmarked records in the selection to do so. This allows you to further restrict a selection for a specific marketing activity, see Defining the Marketing Activity Format on page 207.

Sending Selections

To make your selections available to other users:

1. Select **Info** > **Selection**.
2. In the dialog box, choose the selection you want to send.
3. Click the **Send** button.
4. In the next dialog box, select the user(s).
5. Confirm with **OK**.

The Message "Done!" appears. Click **OK**.

Note: Selections can only be sent to reps that have been assigned a login in the **Rights** module.

Deleting Selections

To delete a selection:

1. Select **Data** > **Selection** from the menu.
2. Mark the selection.
3. Click the **Delete** button and confirm with **Yes**.

Combining Selections

Learn how to combine selections.

In some cases it makes sense to combine several selections:

- Some complex selection conditions cannot be defined in a single selection.

Example: A selection of A customers that have been visited at least once per month, and B customers visited at least once per year.

- A selection containing a large number of companies/persons is updated at a time when it does not affect the performance of Aurea.CRM. A second selection can then be created from the results of the first selection. The second selection is quicker to execute than a complex selection and can therefore be updated at any time.

Example: The "New customers" selection is regularly updated at night. A second selection extracts all companies in a specific sector from the initial selection. This second selection also needs to be executed regularly, but this can also be done during the day.

- If both selections are already present, reusing the selections saves time defining the selection.

Selections are combined using the following options:

- **Base:** Determines which data is used as a basis for the selection:
  - **Entire Database:** The entire database is searched.
  - **Selection:** The current selection is searched. If another selection is specified under **Base Selection**, that selection is used as the basis instead.
- **Result:**
  - **Replace:** The current contents of the selection are overwritten by the result.
  - **Extend:** The results of the selection are added to the current selection.

Note: If you have selected **Extend** under **Result** but no selection is displayed under **Current Selection**, you are prompted to load a selection. If you had previously loaded a selection and then delete all settings using the (**Delete**) button, the results of the selection are written to the previously loaded selection.

The options available support the following use cases. You can either edit the selection conditions on the fly or define base selections and combine them. Using base selections has the advantage of allowing you to define complex selection conditions and reuse them at a later date.

- Union of two selections by editing conditions, see Creating Unions by Editing Conditions on page 108.
- Intersections of two selections by editing conditions, see Creating Intersections by Editing Conditions on page 109.
- Intersections using base selections, see Intersections with a Base Selection on page 109.
- Regularly extending selections using a base selection, see Extending Selections with a Base Selection on page 110.

Creating Unions by Editing Conditions

Learn how to create union using editing conditions.

To create a union between two customer groups (e.g. companies in Austria and companies in Germany) by editing the selection conditions:

1. Define a selection:
   - Containing the first condition (Company: Country = Austria)
   - **Base = Entire Database**
   - **Result = Replace**
2. Click on (**Execute**) to update the selection.

   The existing records are removed from the selection. The system searches the entire database for all companies/persons who meet the first condition and adds them to the selection.
3. Edit the selection:
   - Replace the first condition with the second condition (Company: Country Germany).
   - **Base = Entire Database**
   - **Result = Extend**
4. Click on (**Execute**) to update the selection.

The system searches the entire database for all companies/persons that meet the second condition and adds them to the selection.

Creating Intersections by Editing Conditions

Learn how to create intersection by editing conditions.

To create an intersection between two selections by changing the conditions:

1. Define a selection:
   - Containing the first condition (e.g. **Lead Status** = "Customer" OR "Regular Customer")
   - **Base = Entire Database**
   - **Result = Replace**
2. Click on (**Execute**) to update the selection.

   The system searches the entire database for all companies/persons who meet the first condition and adds them to the selection.
3. Edit the selection:
   - Replace the first condition with the second condition (e.g. no completed visits)
   - **Base = Selection**
   - **Result = Replace**
4. Click on (**Execute**) to update the selection.

The system searches the current selection for all companies/persons that meet the second condition and saves them in the selection. The original selection created in step 2 is overwritten in the process.

Intersections with a Base Selection

You can create an intersection between two selections by defining one selection as the base selection of the other.

Follow the below steps:

1. Define a selection:
   - Containing the first condition (e.g. **Lead Status** = "Customer" OR "Regular Customer")
   - **Base = Entire Database**
   - **Result = Replace**
2. Click on (**Execute**) to update the selection.

   The system searches the entire database for all companies/persons who meet the first condition and adds them to the selection.
3. Save the selection.

4. Click on (**Delete**) to delete all entries in the mask.
5. Define the second selection:
   - Containing the second condition (e.g. no completed visits)
   - **Base = Selection**
   - **Result = Replace**
   - Select the initial selection under **Base Selection**.

6. Click on (**Execute**) to update the selection.

The system searches in the base selection for all companies/persons that meet the second condition and saves them in the second selection: The selection contains all customers/regular customers that have not been visited.

Extending Selections with a Base Selection

Learn how to extend selection with base selection.

The first selection ("New Customers") contains all companies/persons that became customers over the last 3 weeks. The second selection ("Construction Sector") searches for customers in the construction sector (**Sector** = Construction) stored in the first selection, and extends the second selection to include these records.

Update both selections regularly. The second selection only searches in the first selection, and therefore is quicker to execute.

1. Define a selection:
   - Containing the first condition (**Company.Lead Status** = Customer AND **Lead Status.Starts on** >= today - 3 weeks AND **Starts on** >= today)
   - **Base = Entire Database**
   - **Result = Replace**

2. Click on (**Execute**) to generate the selection.

   The system searches in the entire database for all companies/persons that meet the first condition, and adds them to the selection.

3. Save the selection.
4. Click on (**Delete**) to delete all entries in the mask.
5. Define the second selection:
   - Containing the second condition (**Sector** = "Construction")
   - **Base = Selection**

- **Result = Extend**
- **Base Selection** = first selection ("New Customers")

6. Click on (**Execute**) to generate the selection.

Note: You can alternatively select **Start Base Sel.** from the context menu to generate the first selection. If you have combined multiple selections in this way, all base selections are generated when selecting this option.

The system searches in the results of the first selection for all companies/persons that meet the second condition, and adds them to the second selection.

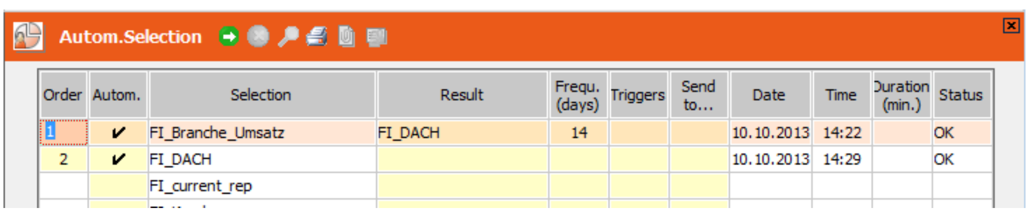
Automatic Selections

You can automatically update frequently used selections using automatic selections.

Note: You can also execute automatic selections using CRM.server or the command line, see CRM.server and mmba.exe Parameters in the *CRM.core Administrator Guide*.

1. Select **Info** > **Autom. Selection** from the menu.

   All the selections are displayed.



2. To update a selection automatically at certain regular intervals, enable the appropriate cell in the **Autom.** column and enter the frequency with which the selections should be generated in the **Frequ. (days)** column. Leave the **Frequ. (days)** column empty to update a selection every time the automatic selection is started.

   The **Order** column displays the order in which automatic selections are processed by the system. It is defined by the order in which you enable the **Autom.** cell for selections.

3. If the **Extend** option is enabled for a selection, specify the target selection in the **Result** column. Records are added to this selection.
4. Use the **Triggers** column to select which triggers should be initiated by the result of the selection, see **Triggers** in the CRM.core Administrator Guide. The trigger(s) are executed for each record in the selection.

5. Use the **Send to** column to determine that the result of the selection should be sent to other reps.

6. Click (**Execute**).

Aurea.CRM checks which of the marked selections are to be carried out on the basis of the frequency entered as well as the date and time of the last update. Aurea.CRM then generates all the selections that need to be updated in order.

The date, time, duration and status (**OK** or **Error**) of the last selection process are displayed in the **Date/Time/Duration (min.)/Status** columns.

Your administrator can choose to log the execution of automatic selections, see Configuration Info Area (**General Settings** category, **Log automatic selections** option) in the *CRM.core Administrator Guide*.

Combining Automatic Selections

To combine selections using automatic selections:

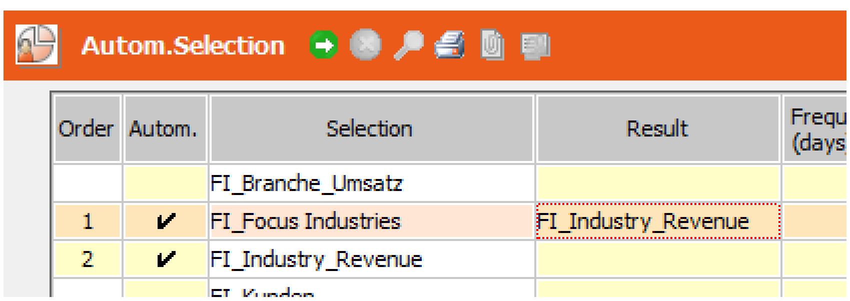
1. Enable these options for the first selection: **Base: Entire Database** and **Result: Replace.**
2. Define the second selection:
   - To create a union of two selections, define the second selection with the following options:

     Base: Entire Database and **Result: Extend**

   - To create an intersection of two selections, define the second selection with the following options:

     Base: Selection and **Result: Replace**

3. Enter the second selection as the result of the first selection in the **Autom.Selection** level. Do not enter a result for the second selection.



Note: You can combine more than two selections with one another by entering the subsequent selection as the result of a selection.

4. Click on (**Execute**).

The result of the first selection is written to the second selection.

Union: The first selection initially only contains the result of the first selection. The system searches the entire database for records that meet the second condition, and adds them to the selection.

Intersection: The second selection initially contains the result of the first selection. The system then searches for those records in the selection that also meet the second condition. This result overwrites the original contents of the selection.

Surveys

Learn how to prepare, conduct and evaluate surveys.

Aurea.CRM allows you to:

- Create Questionnaires including predefined answers
- Implement branches in your questionnaire depending on the customers' answers
- Define additional information for questions
- Configure mandatory questions and standard answers
- Define answers, using catalogs in the database or using the calendar for dates
- Update records or add new records in the database depending on the answers given

This section describes how to

- create a questionnaire, see Defining a Questionnaire on page 113
- prepare a survey, see Preparing a Survey on page 116
- carry out a survey, see Carrying out the Survey on page 117
- evaluate a survey, see Evaluating the Survey on page 119 Texts can be entered in multiple languages in all text fields in the questionnaire (description, questions, answers), see Multi-Language Text Fields.

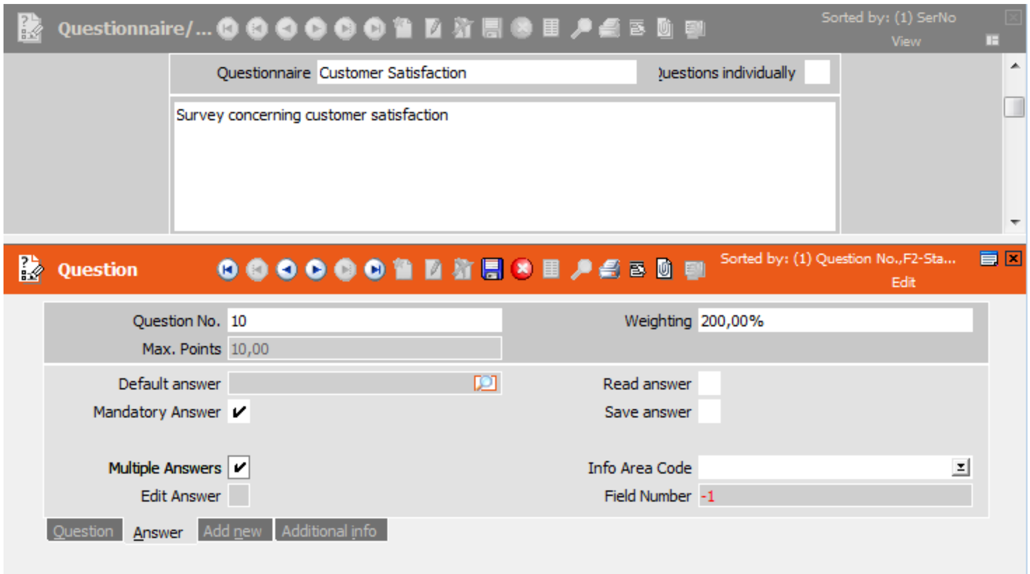
Defining a Questionnaire

Learn how to define questionnaire.

To create a questionnaire:

1. Select **Info** > **Questionnaire/Portfolio** from the menu.
2. Click (**New**).
3. Enter the name of the questionnaire in the **Questionnaire** field and press **Enter**.
4. Click on (**New**) in the **Catalog Questionnaire/Portfolio** dialog box.
5. Enter a short description of the survey in the text field. This description is displayed before the first question when working through the questionnaire.

6. Enable the **Questions individually** check box to determine that questions can only be answered in the defined order (the current question must be answered before proceeding to the next question).
7. Save the record.
8. Select **Questions** from the context menu. The **Question** info area is displayed.



9. Define the questions and answers, see Defining Questions and Answers. For details on branching questionnaires, see Questionnaires with Branches.

The maximum amount of points that can be allocated (sum total of the maximum points attainable for all questions) is automatically entered in the **Max. Points** field.

Select **Print** from the context menu to print the questionnaire. This option is only available if you have been assigned access to the **Question** and **Answer** info areas.

Defining Questions and Answers

To define a question for the questionnaire:

1. In the **Question** info area click (**New**).
2. Enter a number into the **Question No.** field. This number determines the order of the questions in the survey.

> **Note:** The highest number available is "255". Aurea recommends that you number the questions "10, 20, 30, .." instead of "1, 2, 3, .." so that you can easily insert new questions later.

3. Enter the question in the **Question** field.
4. You can enter a percentage in the **Weighting** field (for example "200" to double the number of points awarded) for replies to this question.

5. Use the options on the **Answer** tab to define the answers:
   - To select a single answer from a list of predefined options (radio buttons), ensure that the **Multiple Answers** and **Edit Answer** options are disabled.
   - To select several answers from a list of predefined options (check boxes), enable the **Multiple Answers** check box.
   - To enter the answer manually, enable the **Edit Answer** check box.
   - To select a catalog value, enable the **Edit Answer** check box and select the desired info area (**Info Area Code** field) and catalog field (**Field Number** field).
   - To edit the contents of a company/person field: Enable the **Edit Answer** and **Read Answer** check boxes and select the target field and info area. Enable the **Save Answer** check box to save any changes to the default answer to the database.

   Note: Values in the database are only updated for answers for which an answer is entered. Default answers or empty answers from unanswered questions do not overwrite existing data.

   - To add a new company-dependent or person-dependent record based on data collected from answers: For each question, enable the Edit Answer check box and select the target field and info area. Switch to the Add new tab and enable the Add Record option.

     You can add two records in the same info area from within the same questionnaire (e.g. two activity records). To do so, enable the **Add Further Record** check box for the questions concerning the second record.

     Note: Records are only added the first time the survey is carried out.

6. Save the question.
7. You need to define the possible answers for those questions that have predefined answers (the first two options under point 5). To do so, select **Answer** from the context menu. The **Answer** info area is displayed. You can define any number of possible answers. The number of the answers determines the order they are displayed in the questionnaire. Enter a value in the **Points** field to award points to answers.
8. Return to the **Questions** info area. The **Max. Points** field displays the maximum number of points that can be achieved for the question.

For further information on questions and answers, refer to the online field help.

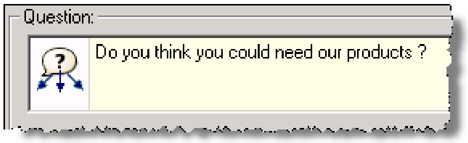
Questionnaires with Branches

You can define follow-up questions that are only asked if a specific answer is given to the previous question, allowing you to define branches in the questionnaire:

- Select the next question in the **Follow-up Question** field.
- If you have entered a follow-up question for an answer, that question is only asked next if the corresponding answer is selected.

- If no follow-up question is defined for the answer, the question's follow-up question or the question with the next question number is displayed.
- The **Follow-up Question** field in the **Answer** info area is ignored if more than one answer is possible to a question (i.e. the **Multiple Answers** check box isenabled for the question).
- Questions are always processed in ascending order.

Branching questions in the questionnaire are indicated visually.



You can add multiple levels of branching. The branches do not need to have a common final question.

Note: If a questionnaire contains branches, ensure that a follow-up question is defined for each question or answer, and that the **Last Question** check box is enabled for the last question. If no follow-up question is defined and the **Last Question** check box is not enabled, the question with the next highest number is automatically used as the next question.

Preparing a Survey

Learn how to prepare a survey.

To prepare a survey you have the following options:

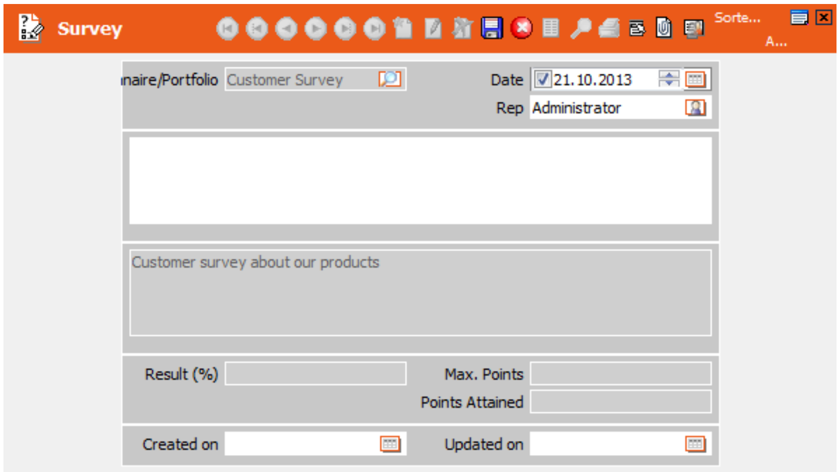
- Create an activity, select a questionnaire in the **Questionnaire** field and a date in the **Survey on** field.
- Enter date and questionnaire in the **Survey on** and **Questionnaire** fields in the **Execution (Marketing Activity)** info area. You can find further information on marketing activities under see Marketing Activities on page 194.
- Create the survey for a company or person:

  1. Switch to the company or person and select **Info** > **Survey** from the menu.
  2. Click on (New).

  Note: In the **Company+Person** level the allocation depends on whether **Person-Related Info** or **Company-Related Info** has been chosen from the **Data** menu.

  ---

  3. Select the desired questionnaire in the Questionnaire/Portfolio field.
  4. Enter comments concerning the survey in the upper text field. The questionnaire's text is displayed in the lower text field.



5. Save.

Note: You can add any number of surveys to a company or person, however you can only store one survey using the same questionnaire on the same day.

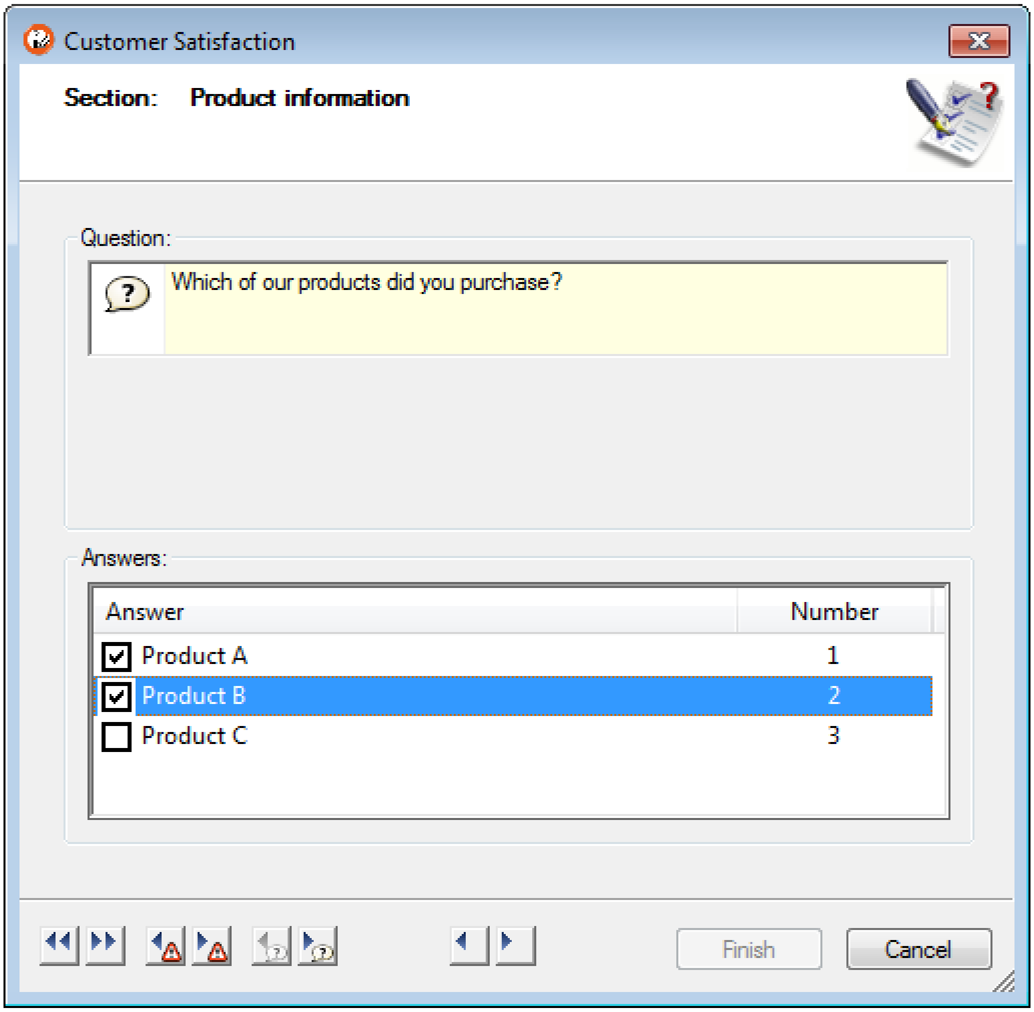
Carrying out the Survey

Learn to carry out survey.

To carry out a survey:

1. Open the survey:
   - If the survey has been added for a company: Switch to the survey and select **Questionnaire** from the context menu.
   - If the survey has been entered in an activity or work order record: Switch to the activity or work order record and select **Survey** from the context menu.
   - If the questionnaire is used within a marketing activity: Select **Edit Activity** from the context menu in the **Marketing Activity** info area to switch to the activity. Select **Survey** from the context menu in the **Activity** info area.

Note: The **Survey** (or **Questionnaire**) option is only active if you have been granted access to the **Questionnaire, Questions, Answer, Survey** and **Survey Result** info areas.



2. Use the buttons to navigate the questionnaire, and answer the questions.

- (Previous/Next Section): Navigate to the previous/next section.
- (Previous/Next Mandatory Question): Navigate to the next/previous mandatory question.
- (Previous/Next Open Question): Navigate to the previous/next unanswered question.
- (Back/Next): Navigate to the previous/next question.

3. Save the survey using the **Finish** button.

You can edit a saved survey at a later date.

Printing Surveys

Learn how to print surveys.

Select **Print** from the context menu in the **Questionnaire/Portfolio** info area to print the questionnaire.

Note: This option is only available if you have been granted access to the **Question** and **Answer** info areas.

Select **Print** from the context menu in the **Survey** info area to print the survey. You can determine whether to print all responses (**All reactions to question**) or only those options selected when carrying out the survey (**Selected reactions to question**).

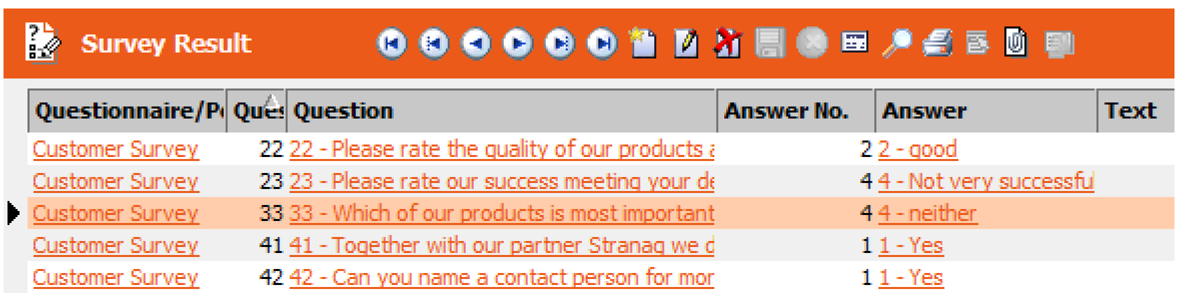
Note: This option is only available if you have been granted access to the **Survey Result** info area.

Evaluating the Survey

Learn how to evaluate the surveys.

The **Result (%)** and **Points Attained** fields in the **Survey** info area are calculated automatically and cannot be edited. The entry in the **Max. Points** field is entered automatically when you select a questionnaire.

After saving the questionnaire, the result is saved in the **Survey result** info area. To access this info area, select **Survey result** from the context menu in the **Survey** info area.



Questionnaire/P	Ques	Question	Answer No.	Answer	Text
Customer Survey	22	22 - Please rate the quality of our products a	2	2 - good	
Customer Survey	23	23 - Please rate our success meeting your de	4	4 - Not very successful	
Customer Survey	33	33 - Which of our products is most important	4	4 - neither	
Customer Survey	41	41 - Together with our partner Stranag we d	1	1 - Yes	
Customer Survey	42	42 - Can you name a contact person for mor	1	1 - Yes	

A record is created for each answer. Aurea.CRM updates the points that a person has attained (in the **Survey** info area) based on the weighting, and determines the percentage of possible points obtained.

Select **Survey analysis** from the context menu in the **Questions** info area to display an overview of all the responses to the currently selected question.

You can create an analysis to analyze the entire survey, see Analyses on page 270. When defining conditions applied to the **Answer No.** field, you can select the desired questionnaire, question and answer from drop-down lists, see Defining Conditions on page 55.

Copying Surveys

If a survey which has already been carried out is communicated (i.e. the **CmCd** field is enabled in the survey result records), selecting **Survey** from the context menu in the **Activity** info area opens the popup calendar instead of the survey.

The current date is entered by default, or the next available date, if the survey is carried out today for this customer. Enter the date that the new survey should be saved for.

You can choose to delete the previous survey.

You can copy a survey that has already been carried out using the **Copy** entry in the context menu of the **Survey** info area, irrespective of whether the survey has been communicated or not.

Note: This option is only active if you have been granted access to the **Survey Result** info area and have been granted the right to add new records to the **Survey** and **Survey Result** info areas.

Timelines

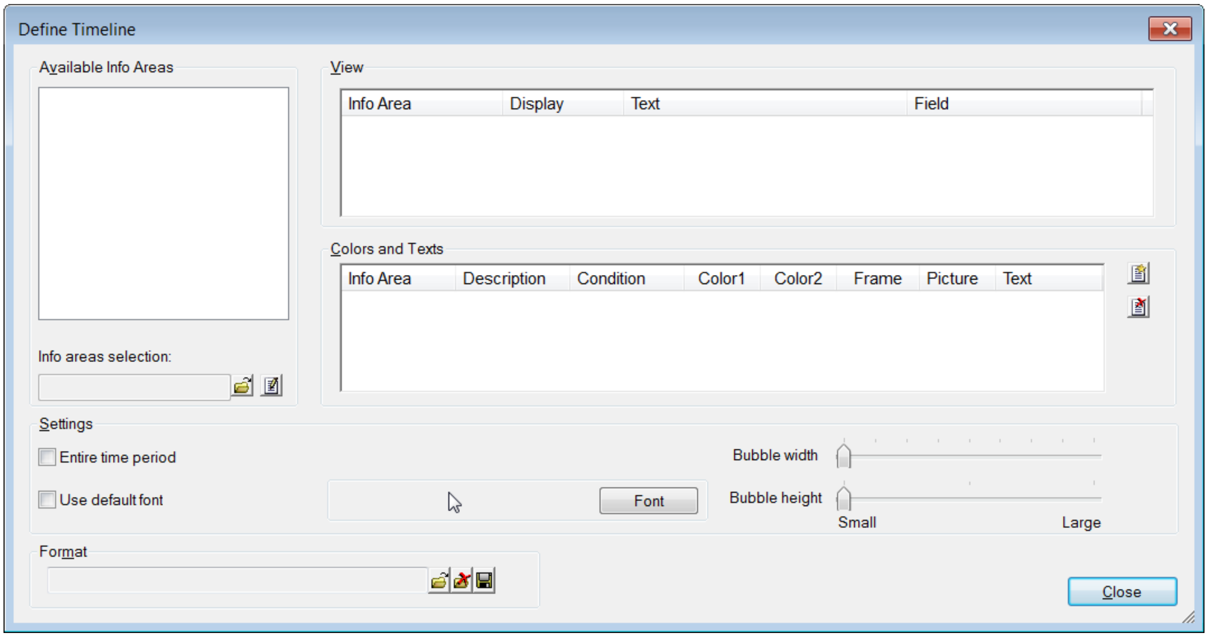
Timelines allow you to display customer-related information, such as activities, offers and the like in an overview, providing you with information on your company's schedule.

The selected records are displayed along a time axis as "bubbles". You can configure the overview to display different types of records using different colors, icons and text.

Defining a Timeline

To define a timeline:

1. Select **Extras > Define Timeline** from the menu.



2. Use the (**Load**) button under **Format** to select a transfer format containing the info areas you wish to include in the timeline, see Transfer Fields on page 79.

   If you wish to display all the activities for a person or company, for example, select the **Activity** info area.

   Note: The transfer fields format must NOT contain the parent info area (**Person** or **Company** in the example above. You can only display info areas in the timeline that are directly related to one another in Aurea.CRM's hierarchy.

   Use (**Edit**) to edit the format. It suffices to select the info areas you wish to be included in the timeline.
   The info areas available in the format are listed under **View**.

3. Use the list under **View** to configure the following:
   - **Display:** This check box is enabled by default for all info areas. If you wish to prevent data from an info area being displayed, disable this check box.
   - **Text:** Click on to determine the text displayed in the bubble, see Defining a Reference. If you do not enter any text, the default reference is used.
   - **Field:** The name of a default date field in the selected info area is displayed here. This is the date that corresponds to the position of the bubble in the timeline. If you wish to use a different date field, click on and choose the field.

4. Configure the colors used in the overview:

   a. Select an info area in under **View**.

   b. Click on (**New**) in the **Colors and Texts** pane.

   c. Enter a description for the color settings.

d. Define the conditions used to determine the records displayed in this color, see Conditions on page 54.

e. Select a color for the bubbles.

f. If you wish to display the buttons with gradients, select a second color different from the first color.

g. Select a color for the **Frame**.

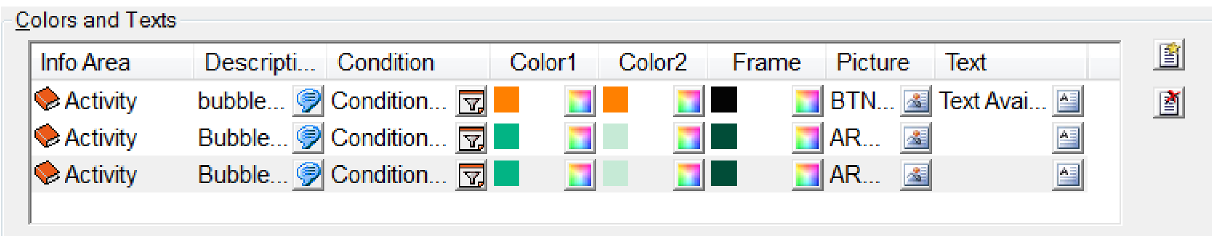
h. Select an icon that is displayed in the bubble.

i. Enter a text for the bubble. The text you defined in the **View** list is overwritten by this text.

You could determine that different activity types (visits, telephone calls etc.) are displayed in different colors. Define a new condition for each type of visit and select the desired color.

Define specific conditions before defining general condition, to ensure that the color defined for visits takes precedence over the general color defined for activities. The color from the first condition in the list that applied to a record is used.

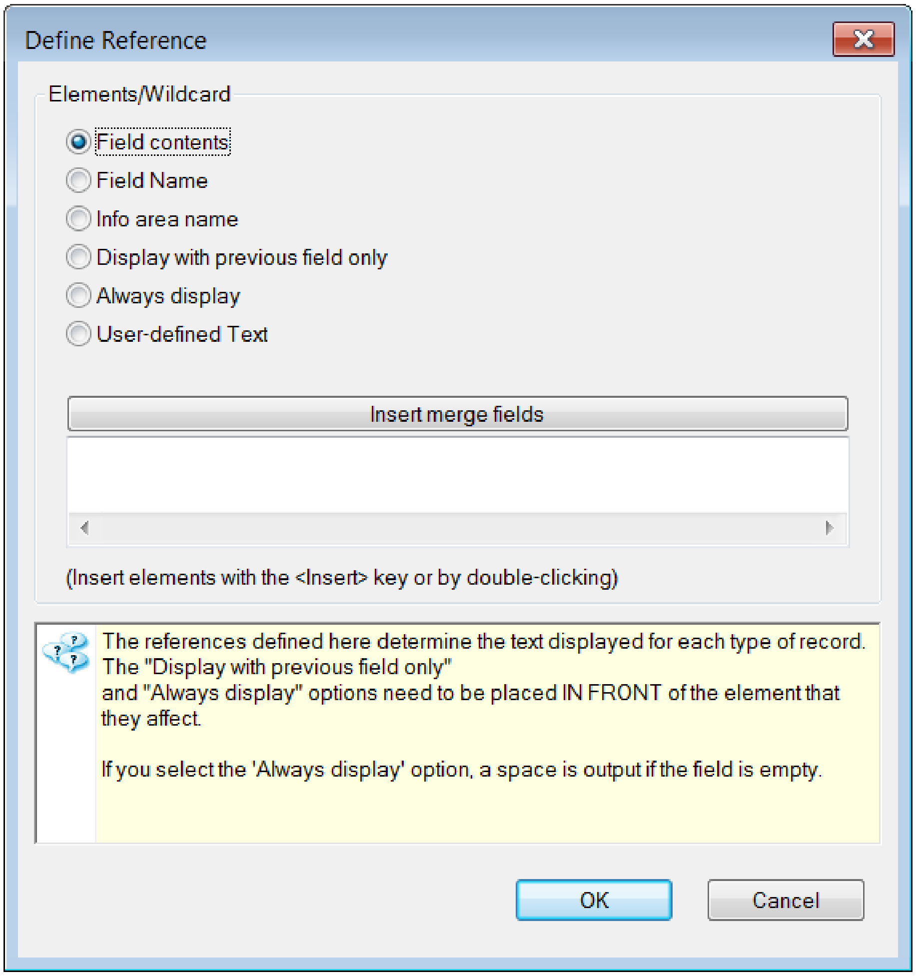
Any settings you do not determine are set to the default values. You can change the settings at any time by clicking on the icons in the entries in the list:



5. If you wish to define a new font, click **Font** and select a font.
6. If you wish to use the default font settings, activate the **Use default font** check box.
7. Use the **Bubble width** slider to determine how much space the bubble occupies on the screen.
8. Use the **Bubble height** slider to determine the height of the bubble.
9. Save the format.
10. Click on **Close**.

Defining a Reference

The options in the **Define Reference** dialog box are used to determine the text displayed in the bubbles.



You can add the following elements by selecting the element and clicking on **Insert merge fields**:

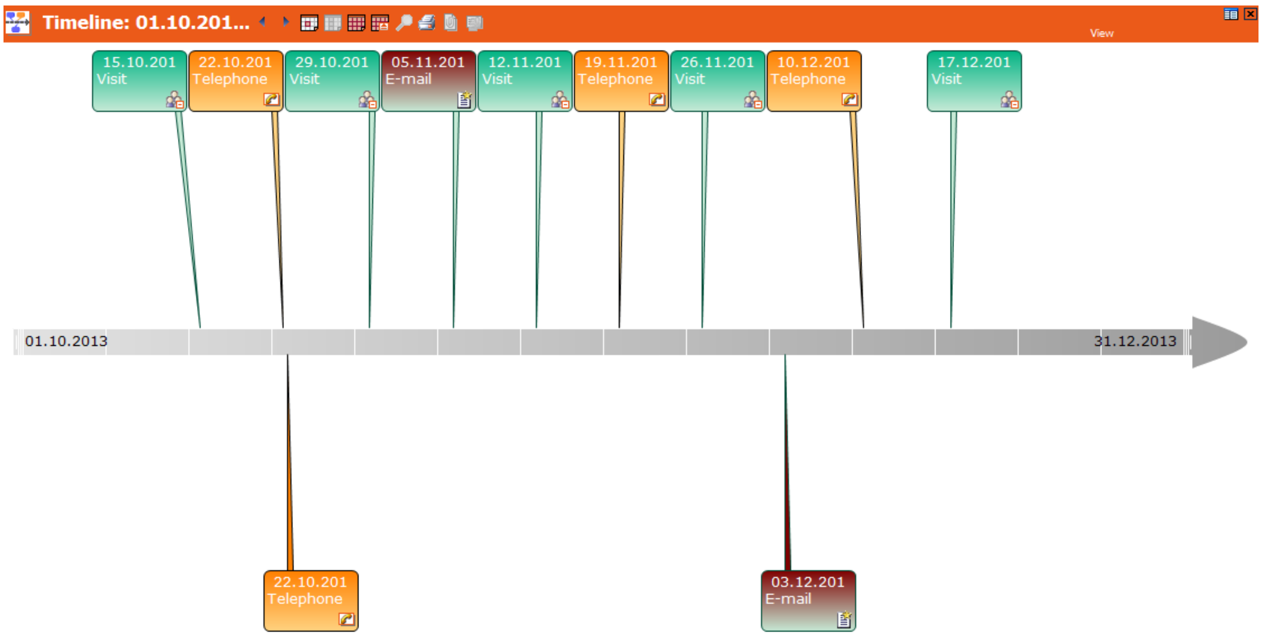
- **Field contents:** The **Field Selection** dialog box opens. Enable the check box next to the field you wish to add. The contents of this field are then displayed in the timeline.
- **Field Name:** The **Field Selection** dialog box opens. Enable the check box next to the field you wish to add. The name of this field is then displayed in the timeline.
- **Info area name:** A dialog box is displayed containing all the info areas in Aurea.CRM. Click on the desired info area. The name of the info area is then displayed in the timeline.
- **Display with previous field only:** An element is added indicating that the following element is only displayed if the previous element is not empty.
- **Always display:** An element is added indicating that the following element is always displayed. If the field is empty, a space is output.
- **User-defined Text:** You can enter text in all the languages available on your installation.

Note: You can also enter the text directly in the field below **Insert merge fields** button; however this text then only applies to the current language. This is not recommended by Aurea.

You can add as many elements as you wish of different types; e.g. field contents and free text.

Displaying a Timeline

1. Switch to the record you wish to use as the starting point for the time axis.
2. Select **File > Timeline.**
3. Click on (**Load**)and select a timeline format.
4. Click on **OK**. The timeline is displayed.



The timeline is displayed in the center of the screen and is divided into time units (1 unit represents a week in the monthly and quarterly views; 1 unit represents a month in the yearly view).

All the records that fall in the specified time period are displayed in bubbles above and below the axis. With large numbers of records, multiple records may be represented by a single bubble.

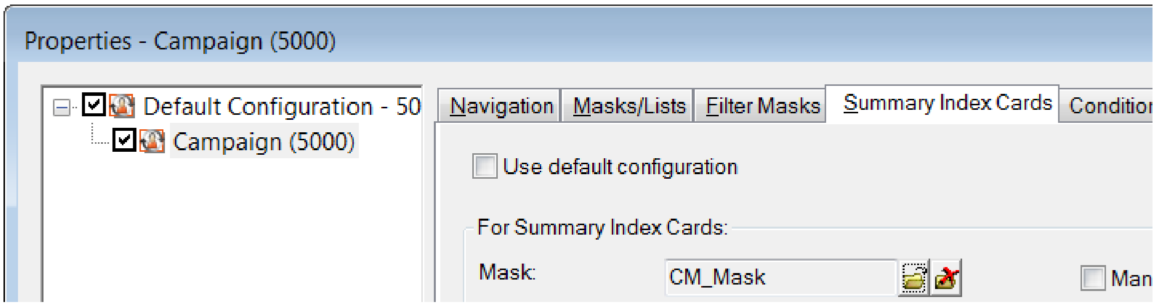
The following options are available:

- **Forward:** Moves forward one time unit.
- **Back:** Moves backward by one time unit.
- **Month:** Displays the monthly view.
- **Quarter:** Displays the quarterly view.
- **Year:** Displays the yearly view.
- **Entire time period:** Displays all records.
- **Print:** Prints the timeline.

Double-click on a bubble to open the corresponding record.

Note: If you display a timeline for a dependent info area, the summary index card may not be displayed (e.g. marketing activities that have been added to campaigns). In this case you need to define a mask for the summary index card:

1. Open the parent (and independent) info area in the integrated view.
2. Create a mask for the summary index card (**Extras > Edit Summary Index Card**).
3. Select **Extras > Define Desktop** from the menu.
4. Select the parent level.
5. Click on **Level Properties**.
6. Select the summary index card from the **Summary Index Cards** tab.



Other Info Areas and Functions

Learn about the miscellaneous Info Areas and Functions.

Managing Companies and Persons

Learn how to manage companies and persons in Aurea CRM.

The following options are available for managing companies and persons in Aurea.CRM:

- If you identify two companies or persons in the database as duplicates, you can merge the records, see Merging Companies and Merging Persons. The data entered in both company/person records and all dependent data (e.g. activities) is merged and one of the companies/persons is deleted after merging. You must have the appropriate access rights to delete the "incorrect" company or person to do so.

Note: If not all dependent records are available on a station, **do not** merge companies/persons on this station, as otherwise data can be lost during communication. In this case, your administrator can prevent you from being able to delete companies or persons and/or deny access to the **Edit > Merge Company/Person** menu entry in your desktop settings, see Desktop in the *Aurea.CRM win Administrator Guide*.

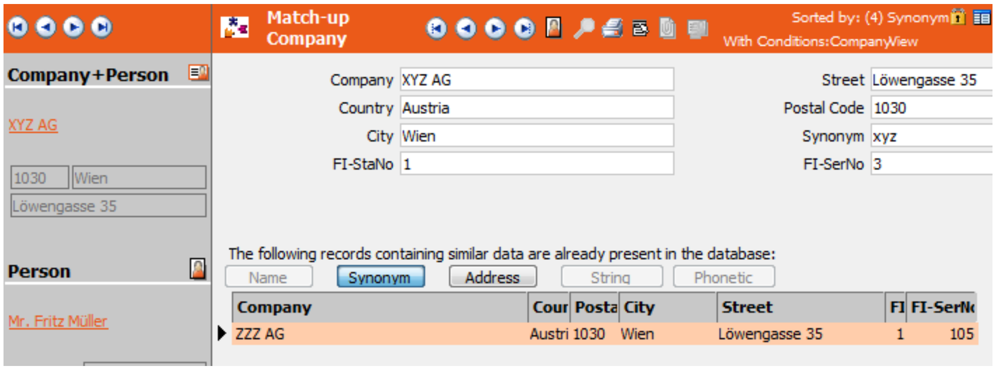
- Manage persons active in multiple companies, see One Person in Several Companies.

Merging Companies

To merge two companies:

1. Switch to the company record that should be deleted after merging the records.

2. If you know the **StaNo** and **SerNo** of the other company, select **Edit** > **Merge Company/Person** from the menu, enter the numbers and click **OK**.
3. If you do not know the company's **StaNo** and **SerNo**:
   a. Select **Edit** > **Find Similar Companies** from the menu. A list of companies with similar names is displayed.



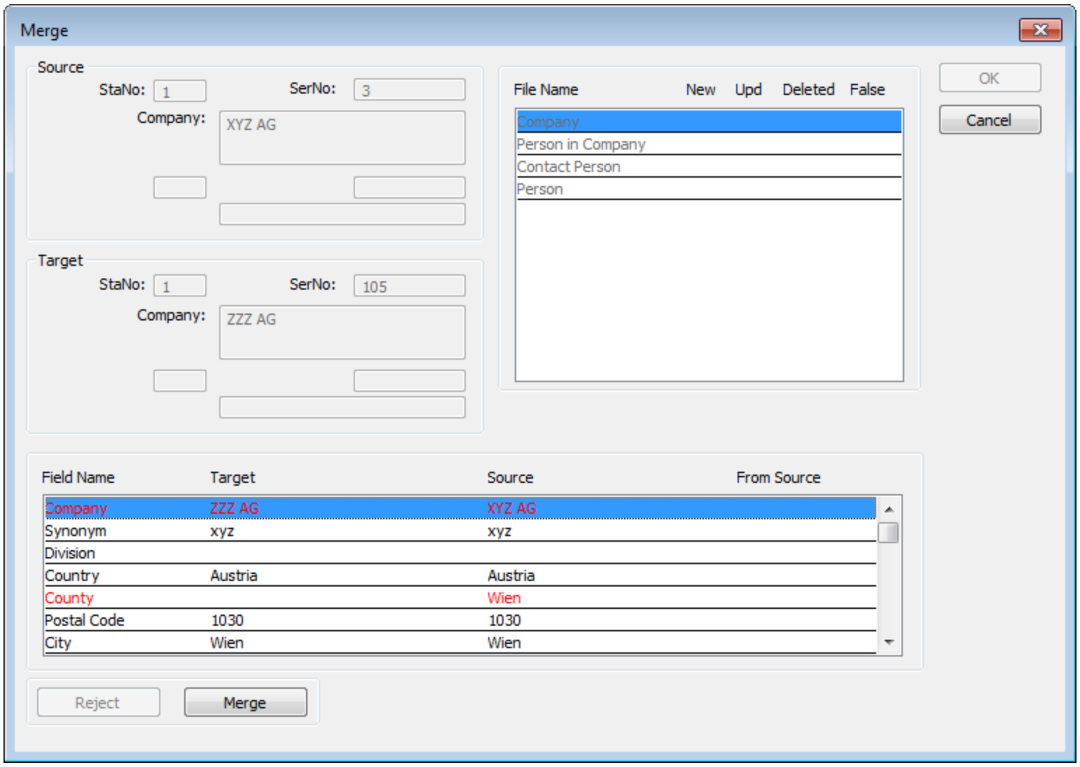
Note: To find similar companies, you need to enable the options under **Match-up Company** accessible by selecting **Extras > Other Options** from the menu.

   b. Select Merge from the context menu in the company you wish to retain. The company's StaNo and SerNo are automatically transferred to the dialog box that is displayed.

Note: If the company found by the search is not a duplicate of the source company, but, for example, a member of the same corporation, select **Create Correlation** from the context menu instead to add a relationship between the two companies. You can also add a relationship if two companies are merged, see Relationships in the *Business Logic Manual.*

4. Click on **OK** in the **Merge Company and/or Person with** dialog box.
5. Confirm that the first company should be deleted.

   The data entered in the source and target companies is displayed at the bottom of the **Merge** dialog box.



6. By default, the data entered in the target company is used. If you wish to retain data from the source company, click in the appropriate row and then click in the **From Source** column.
7. Click **Merge**. The company records are merged.
8. The persons in both companies are compared. You have the following options when merging persons:
   - Use the **From Source** column to determine which data should be used from the target and which data from the source person. Once you have made your settings, click on **Merge**.
   - If you do not wish to merge two persons, click on **Reject**.

Note: When merging companies, identical persons (KP, CP, PE) are only merged if the person (PE) is only linked to a **single** company.

9. The dependent records stored for the companies are compared.
   - Most records (e.g. activities) are automatically transferred from the source company to the target company.
   - In some cases, this can cause problems.

     Example: You cannot store more than one interest record containing the same interest group and date (unique index). In such cases you need to use the **From Source** column to determine which data to keep.

     If you select **Reject** in such cases, an error message is displayed.

     - The error message may also be displayed when merging some records.
     - Confirm the error message with OK and click on Export.

     A further error message is displayed. The records that caused the error and all their dependent records are saved under **..\user\frm\merge<info area ID>.txt**. This file contains one record per line; fields are separated using "|" (pipe character). This file can be imported using the **Import** module, see Import/Export in the *Aurea.CRM win Administrator Guide*. If you do not export the data, you are asked whether you wish to continue with the process.

10. Click **OK** once the merge procedure is complete.

If the application should crash when merging records:

1. Start Aurea.CRM and begin the merge procedure again.
2. Confirm that you wish to proceed.
3. You can continue from where you left off.
4. If the procedure is terminated, the corresponding data is saved in a temporary file under `\user\frm\merge.sav`. This file cannot be read by the module and is deleted automatically when the merge procedure is completed.

Merging Persons

To merge two persons:

1. Switch to the persons record that should be deleted after merging the records.
2. If you know **StaNo** and **Serno** of the other person (and (for KP) of the parent company), select **Edit** > **Merge Company/Person** from the menu, enter the numbers and click **OK**.
3. If you do not know **StaNo** and **Serno** of the other person:
   a. Select **Edit** > **Find Similar Persons** from the menu. A list of persons with similar names is displayed.

      Note: To find similar persons, you need to enable the options under **Match-up Person** accessible by selecting **Extras** > **Other Options** from the menu.

   b. Select Merge from the context menu in the persons record you wish to retain. StaNo and Serno are automatically transferred to the dialog box that is displayed.
4. Click on **OK** in the **Merge Company and/or Person with** dialog box.

The merge is performed as described for companies, see Merging Companies.

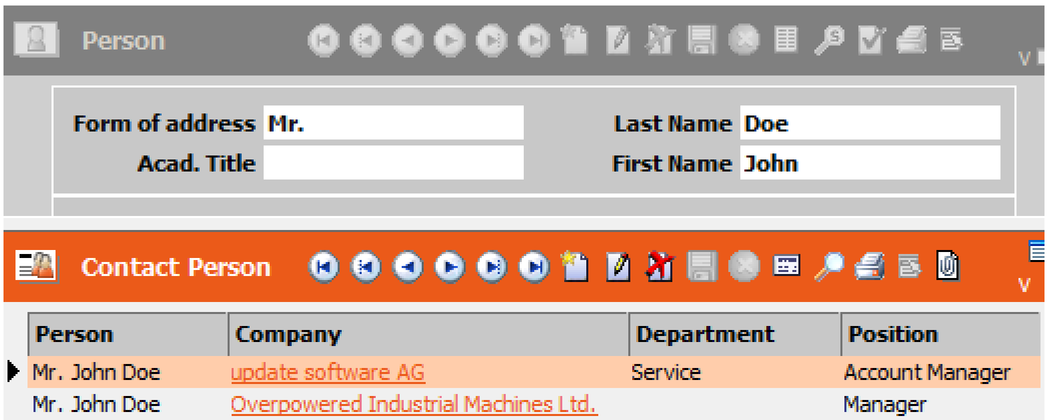
More information on merging persons, see Merging Persons in the *CRM.core Administrator Guide*.

One Person in Several Companies

Use the **Contact Person** (CP) info area to depict persons active at more than one company in the database:

Select **Contact Person** from the context menu in the **Person** level to add new contact person records for a person:

1. Switch to the desired person.
2. Select Contact Person from the menu.



3. Click (New).
4. Click on (Search) in the Company field.
5. Select the desired company record.
6. Enter additional information on the person's connection to the company (e.g. Department, Position)
7. Save. Select Contact

Select **Contact Person** from the context menu in the **Company+Person** level to display all contact persons in a company (enable **Data** > **Company-Related Info**).

History

Your administrator can configure the record history for each info area

For further details, see Enabling the History in the *CRM.core Administrator Guide.*

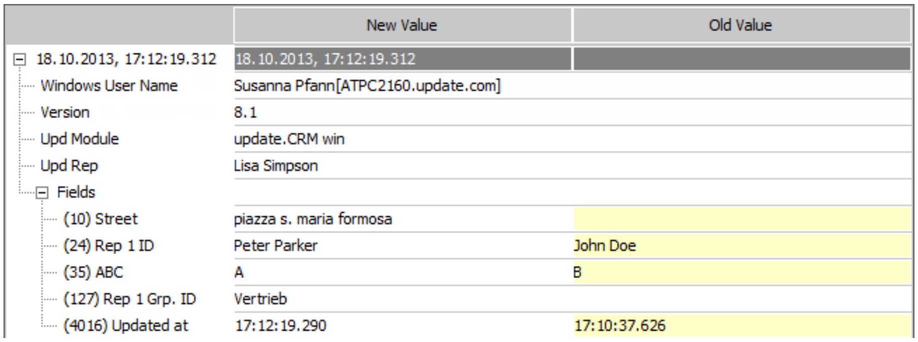
The history stores information on who applied what changes to a record, and when.

To display the history of a record in the Aurea.CRM win main module:

1. Switch to the desired record.
2. Select the context menu option or click on the button in the icon bar defined by your administrator.

By default, the history is displayed in list form. Use the context menu options to switch between the following views:

Detail View: Displays all available information in the tree view (a separate tree is displayed for each station).

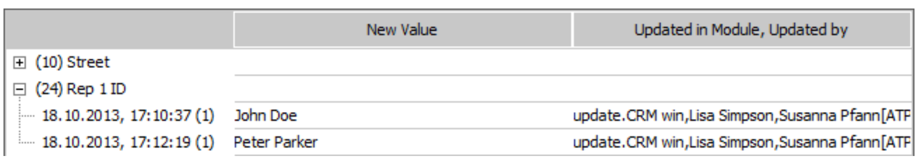


	New Value	Old Value
18.10.2013, 17:12:19.312	18.10.2013, 17:12:19.312	
Windows User Name	Susanna Pfann[ATPC2160.update.com]	
Version	8.1	
Upd Module	update.CRM win	
Upd Rep	Lisa Simpson	
Fields		
(10) Street	piazza s. maria formosa	
(24) Rep 1 ID	Peter Parker	John Doe
(35) ABC	A	B
(127) Rep 1 Grp. ID	Vertrieb	
(4016) Updated at	17:12:19.290	17:10:37.626

Double-click on a field with a yellow background to switch between the new and old value in the list.

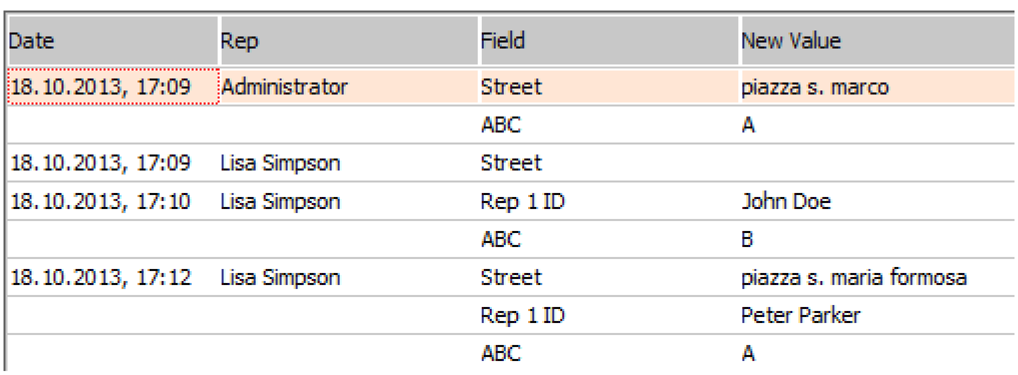
This view also includes changes to system fields, see System Fields on page 260.

Field-based display: Displays changes per station sorted by field number:



	New Value	Updated in Module, Updated by
(10) Street		
(24) Rep 1 ID		
18.10.2013, 17:10:37 (1)	John Doe	update.CRM win,Lisa Simpson,Susanna Pfann[ATF
18.10.2013, 17:12:19 (1)	Peter Parker	update.CRM win,Lisa Simpson,Susanna Pfann[ATF

List: Display changes sorted by station and date:



Date	Rep	Field	New Value
18.10.2013, 17:09	Administrator	Street	piazza s. marco
		ABC	A
18.10.2013, 17:09	Lisa Simpson	Street	
18.10.2013, 17:10	Lisa Simpson	Rep 1 ID	John Doe
		ABC	B
18.10.2013, 17:12	Lisa Simpson	Street	piazza s. maria formosa
		Rep 1 ID	Peter Parker
		ABC	A

Datum	Bearbeiter	Feld	Neuer Wert
18.10.2013, 17:09	Administrator	Straße	piazza s. marco
		ABC	A
18.10.2013, 17:09	Lisa Simpson	Straße	
18.10.2013, 17:10	Lisa Simpson	AD 1-ID	John Doe
		ABC	B
18.10.2013, 17:12	Lisa Simpson	Straße	piazza s. maria formosa
		AD 1-ID	Peter Parker
		ABC	A
		AD 1-Grp-ID	Vertrieb

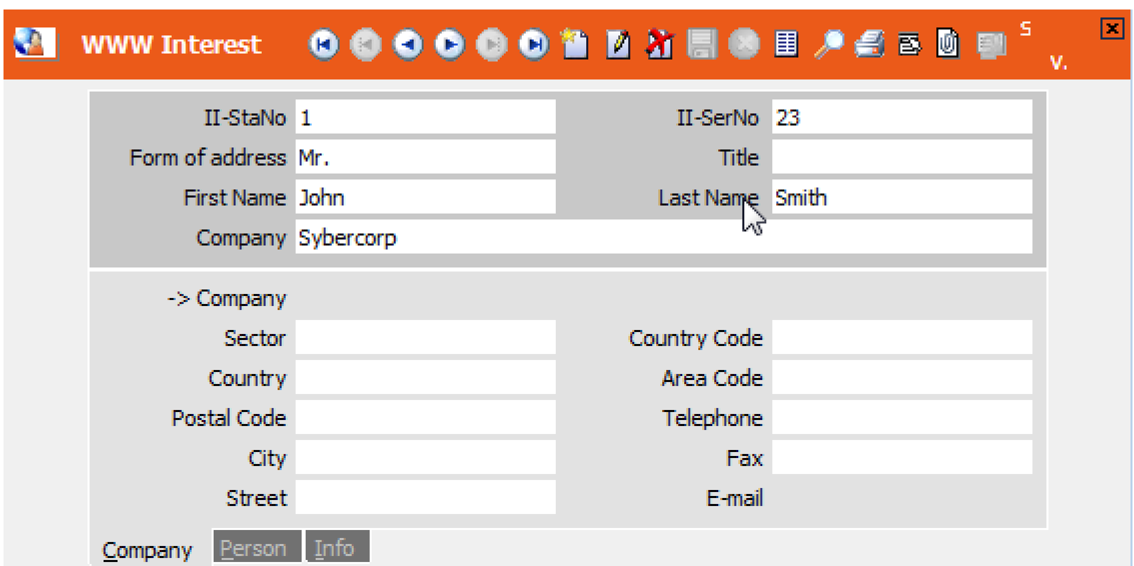
Enable the **Only changes** option in the context menu to restrict the display to only those fields that have been edited. Disable the option to also display the contents of fields unchanged since the start of the history.

Note: The **Only changes** option is unavailable in the detail view.

WWW Interest

The **WWW Interest** info area is used to store company and person-related data on visitors to your web site.

This data mus be imported using an external interface.



Internet visitors can be added to the **Company** and **Person in Company** info areas, see Generating Customers.

Generating Customers

To add an internet interest to the database:

1. Switch to the WWW interest record you want to enter as a company/person.
2. Select **Generate customers** from the context menu.

   The **Company+Person** level opens in new mode.

3. Change and complete the data if necessary
4. Save the record.

If similar or identical companies or persons already exist in the database, you switch to match-up mode, see Match-Up.

- If the company is already in the database, click (**Found**). (This allows you to assign multiple WWW interest records to a company/person.)
- If you want to add the company as a new record, click on (**New**).

In both cases the keys are generated in the **Company** and **Person** info areas and are copied to the **WWW Interest** info area as well as any dependent info areas. They can also be entered manually or using a workflow.

Info areas which are dependent on the **WWW Interest** info area are also assigned to the company and person.

Note: Changes made to the company, person or WWW interest records at a later date is **not** transferred to the other info areas. This can be performed using triggers, if necessary, see Triggers in the *CRM.core Administrator Guide.*

Records in the **WWW Interest** info area (and their parent records) are only communicated if company/person records have been generated from them, see Communication in the *Aurea.CRM win Administrator Guide*.

Select **Load customer** from the context menu in the **WWW Interest** info area to switch to the associated record in the **Company+Person** level.

You can switch to the **WWW Interest** info area from the **Company+Person** level using the info menu or the icon bar. The first WWW interest record found which is assigned to the current company and person is automatically displayed.

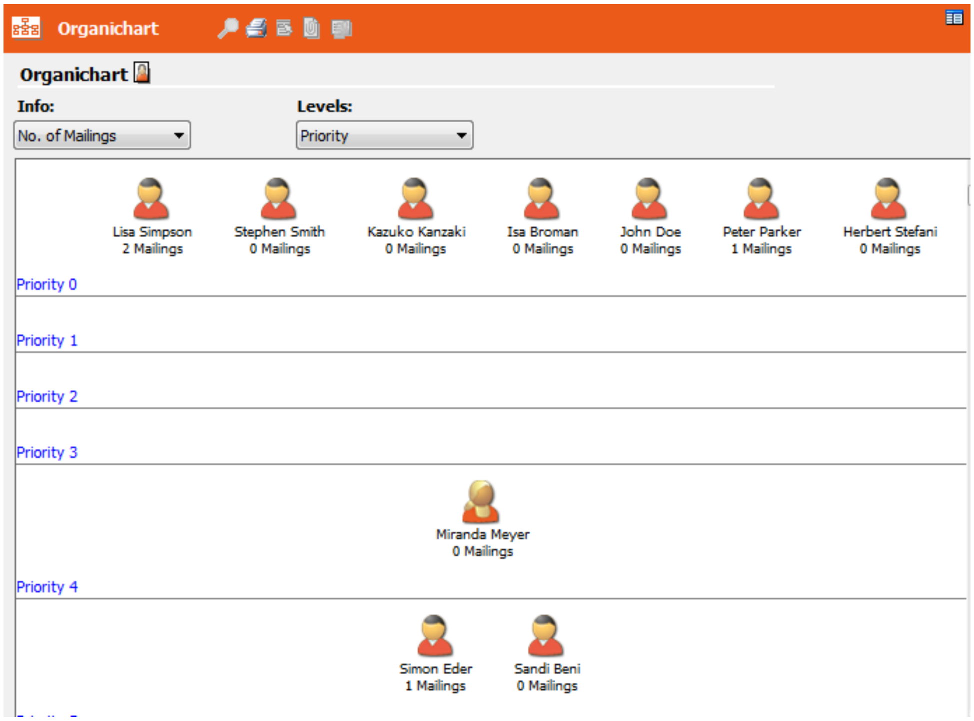
The **WWW Interest** info area's child info areas are used to track visitors' online behavior and to allow personalized messages to be delivered.

The **WWW Interest** (II) and **WWW Interest Configuration** (I9) are also used to define user-specific settings (e.g. search, calendar etc.) for Aurea.CRM web users, see Aurea.CRM web Administrator Guide.

Organichart

The organichart provides you with an overview of the contact persons in a company.

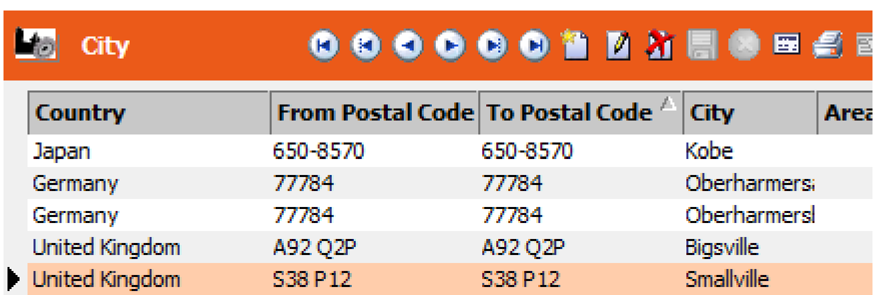
The persons can be sorted by priority, lead status, division or position (**Level** drop-down list).



Details on the number of activities and mailings can be displayed here. Furthermore, you can use drag & drop to change the value of the current sort criterion; e.g. change a person's lead status from "Cold" to "Interest".

City and Country Info Areas

To speed up the input of addresses, Aurea.CRM automatically completes the city and area code based on the entries in the **Country** and **Postal Code** fields.



Country	From Postal Code	To Postal Code	City	Area
Japan	650-8570	650-8570	Kobe	
Germany	77784	77784	Oberharmers	
Germany	77784	77784	Oberharmersl	
United Kingdom	A92 Q2P	A92 Q2P	Bigsville	
United Kingdom	S38 P12	S38 P12	Smallville	

To add data to the **City** info area you have the following possibilities:

- Import data
- Manually add new records in the **City** info area (**Maintenance** module)
- When adding new companies: If there is no corresponding entry in the **City** info area, an entry is added to the **City** info area and used from this point onwards. If an entry already exists in the **City** info area, entering the address manually does not affect the addresses already stored in the database.

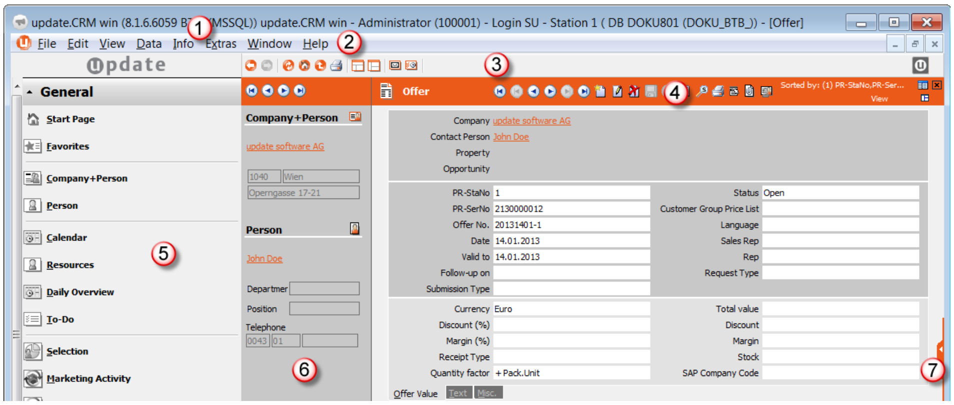
The same principle applies to country codes from the **Country** info area.

For more information about the **City** and **Country** info areas, see City Info Area and Country Info Area in the *CRM.core Administrator Guide.*

3

User Interface

This section provides an introduction to the Aurea.CRM win user interface.



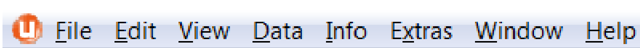
Title Bar

The following information is displayed in the title bar:

- Name of the current module
- Rep name (if not available, alias or user name)
- Current level

Menu Bar

The menu bar is located directly beneath the title bar.

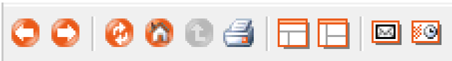


Note: The options found in the **Info** menu can be configured by your administrator. Menu commands can also be renamed, see Desktop in the *Aurea.CRM win Administrator Guide*.

General Toolbar

The general toolbar is located below the menu bar and contains buttons that are available from every level and in all views.

You can also right-click on the general toolbar to access a menu containing the available options.



Position the cursor over a button to display the tooltip for this button.

Buttons in the General Toolbar

	**Back** Navigates to the previous view. This button becomes available once you have navigated at least once within Aurea.CRM win.
	**Forward** Navigates to the next view. This button is available if you have used the **Back** button to navigate back at least once.
	**Refresh** Refreshes the data being displayed.
	**Start Level** Opens the start level.
	**Parent Level** Navigates to the parent level, i.e. to the level displayed in the summary index card, see Summary Index Card.
	**Print** Prints the currently active info area, see Printing on page 85.
	**Horizontal** In the integrated view, arranges the info areas horizontally, see Integrated View on page 153. This button is only active if you have several levels open.
	**Vertical** In the integrated view, arranges the info areas vertically. This button is only active if you have several levels open.

	**Message List** This button takes you directly to the **Message** info area, see Reminders and Messages on page 189. This button flashes when a new message arrives. This button is only displayed if the **Enable Due Messages Popup** check box has been enabled under **Extras** > **Other Options**.
	**Reminder List** This button takes you directly to the **Reminders** info area, see Reminders and Messages on page 189. This button flashes when a new reminder arrives. This button is only displayed if the **Enable Due Reminders Popup** check box has been enabled under **Extras** > **Other Options**.

Your administrator can add additional buttons (New, Search, Program Calls etc.) to the toolbar, see Configuring the General Toolbar in the Aurea.CRM win Administrator Guide.

Level Header

The level header consists of the info area name, a group of buttons and information on the current mode (view, edit).

Double-click anywhere on the level header to hide it. Double-click on the remaining strip to restore the level header.

The level header can be configured freely, and your administrator can present you with exactly the information and buttons you require, see Desktop in the *Aurea.CRM win Administrator Guide*.

Select **View** > **Desktop Properties** from the menu to change certain settings relating to the level header yourself, see Context menu or header on page 264.

Level Header Info

Depending on your settings, the level header info contains the name or reference (e.g. "Activity with Mr X") as well as the corresponding level icon.

Select **View** > **Desktop Properties** from the menu to change the font and width of the level header info.

Command Bar

The command bar is located in the middle of the level header and contains a number of buttons. You can also right-click on the command bar to access a menu containing the available options.

Not all the buttons in the command bar are available by default; they need to be configured by your administrator, see Desktop in the Aurea.CRM win Administrator Guide. The command bar can be used to access workflows, triggers, dashboards as well as single letter formats.

Select **View > Desktop Properties** from the menu to change some of the command bar settings yourself.

The following describes the most important buttons in the command bar:

	**First Record/Last Record** Navigates to the first or last record.
	**Previous Page/Next Page** Navigates a page at a time in the list view.
	**Previous Record/Next Record** Navigates to the previous or next record. **Note:** The navigation buttons are disabled in edit mode.
	**Mark** Marks entries in selections, see Editing Selection Data.
	**Find (Ctrl+F)** Opens the search mask for the current info area, see Search Dialog Box. In some levels (e.g. **Company+Person**, **Marketing Activity**) the **Special Search** button is displayed, with which you access a special search function, see Searching on page 43. These buttons are disabled in edit mode.

	**New (Ctrl+N)** Adds a new record to the current info area, see Adding New Records on page 36. This button is disabled in edit mode. Your administrator can configure different types of new entries in various info areas. Use the arrow buttons to switch between the different types, see Desktop in the Aurea.CRM win Administrator Guide.
	**Edit (Ctrl+E)** Switches to edit mode and allows you to edit the current record. This button is disabled if you are in edit mode.
	**Delete (Ctrl+D)** Deletes the current record. This button is disabled in edit mode.
	**Save (Ctrl+S)** Saves the current record. This button is disabled in view mode.
	**Cancel** Cancels the current operation in edit mode. All changes are lost and you are returned to view mode.

Note: Your administrator can configure whether the **Edit**, **Delete**, **Save** and **Cancel** buttons are displayed in the command bar or whether you can edit records via the context menu, see Context Menu on page 142 and **Desktop** in the Aurea.CRM win Administrator Guide.

If you have not been assigned the rights allowing you to delete, Aurea or add records to an info area, then the corresponding buttons are disabled.

 	**Mask (Ctrl+M)/List (Ctrl+T)** Switches from mask to list view and vice versa. These buttons are disabled in edit mode.
	**Person in Company (Ctrl+R)** Displays the persons belonging to the currently displayed company. This button is only available in the **Company+Person** level.
	**Print (Ctrl+P)** Prints the current info area, see Printing on page 85.

	**Context Menu** Opens the context menu, see Context Menu on page 142.
	**Excel** Transfers the current info area to Microsoft Excel, see Spreadsheet on page 333.
	**Dependence (Ctrl+D)** Displays a context menu containing the options **Company-Related Info**, **Person-Related Info** and **Both**. Depending on your choice, the corresponding dependent records are displayed, see Displaying Records on page 29. The currently selected option is indicated with a check mark. **Note:** If the **Both** option is enabled, no new records can be added, see Adding Other Records
	**Found (Ctrl+F)** Merges identical companies or persons, see Match-Up. This button is only available in the match-up mask.
	**Load (Ctrl+L)** Loads formats (selections, conditions, rights etc.)
	**Execute (Ctrl+E)** Starts selections, imports etc.
	**Save (Ctrl+S)** Saves formats (selections, conditions, rights etc.).

	**Document overview** Switches to the document overview, see Document Management on page 237.
	**Transfer to Word Processor (Ctrl+T)** Transfers the current record to your word processor, see Creating a Mail-merge Letter. This option is only available if you have established a connection to the word processor. **Note:** This button is not available by default but can be enabled from the **General** section on the **Header** tab, see **Header Tab** in the Aurea.CRM win Administrator Guide.

Display Info

The right side of the level header displays the current sort criteria and the currently active mode (View, Edit, Add new). Active conditions are also displayed.

In addition the following buttons are displayed:

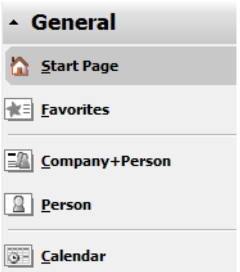
	**Integrate (F3) / Separate window (F3)** Switches between integrated and full view, see Integrated View on page 153. This button is only displayed if multiple levels are open.
	**Close (F4)** Closes the current level.
	In some child levels (e.g. **Edit Message** and **Edit Reminder**), this icon is displayed. If this icon is displayed, you need to close this info area in order to continue working with Aurea.CRM win. Position the cursor over the icon to receive a corresponding message.

Icon Bar

The icon bar is located along the left-hand side of the screen.

Click on the corresponding icon to open an info area. Alternatively, use the keyboard shortcut (Ctrl+Shift and the underlined letter). You can also right-click on the icon bar and select an info area from the popup menu.

Move the mouse over an icon to display the name of the info area.



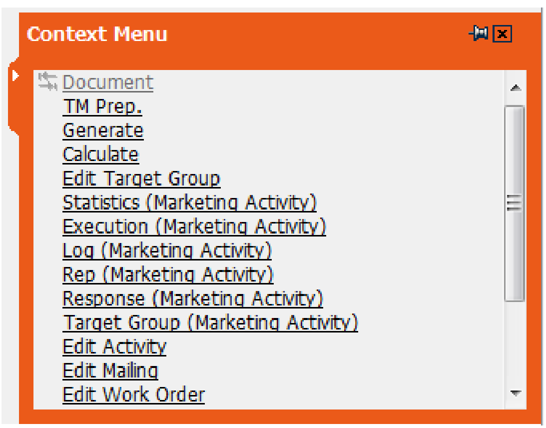
Click on the small up and down arrows to expand or collapse sections.

The icon bar is configurable; for example its color, frame etc, can be changed. You can change some of the settings, see Configuring the Display on page 260.

Your administrator can define which elements, dashboards and workflows are available as icons, split the icon bar into menus that can be expanded and collapsed, as well as add logos and separators, see Desktop in the *Aurea.CRM win Administrator Guide*.

Context Menu

The context menu allows you to access the most frequently used info areas, menu commands, workflows, dashboards etc.



Configuring the Context Menu

User Options

Select **View** > **Desktop Properties** from the menu to configure the following:

- whether the context menu docks on the right of the screen, can be positioned anywhere or is only available as a popup menu by right-clicking in the mask
- whether the context menu should always be displayed
- the size and font used in the context menu

For further information, see Context menu or header on page 264.

Administrator Options

Your administrator can configure the context menu for each level, see Context Menu Tab in the *Aurea.CRM win Administrator Guide*. Your administrator can:

- add additional entries; e.g. to switch to other info areas or access functions
- define links to other info areas as references
- determine which options are available from the menu depending on the current context (mask or list view, view mode, edit mode).

Accessing the Context Menu

You can access the context menu in the following ways:

- Right-click in the mask in mask view.
- Right-click on a record in list view.
- Click (**Context Menu**) in the header.
- If the context menu is docked on the right of the screen and closed, open the context menu by clicking on the tab.
- If the context menu is free-floating, display the entries by clicking on the small down arrow in the context menu's title bar.
- Select **View > Desktop Properties > Context menu/header > Display opened** to keep the context menu opened permanently.

Minimizing the Context Menu

To minimize the context menu:

- If the context menu is docked on the right of the mask, click on .

The context menu is minimized.

- If the context menu can be freely positioned on the mask, click on in the header.

Only the context menu's header is displayed.

Closing the Context Menu

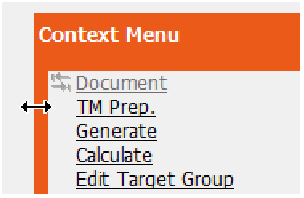
- Click on the close button in the context menu's header.
- Select **Context Menu** from the popup menu available by right-clicking the mask or from the **Context Menu** icon () in the command bar to display the context menu again.

Changing the Context Menu's Position and Size

If the context menu is either docked or free-floating, you can change its position. Click on the context menu's header and drag it to the desired position.

To resize the context menu:

1. Click on the icon in the context menu's header. The icon changes to .
2. Move the edges of the context menu using the mouse.



3. Click on the icon in the header to revert to the original settings.

These changes are level-dependent and the desktop settings can be restored at any time.

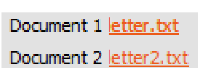
Hyperlinks

Hyperlinks are displayed in certain fields in lists and masks, as well as the summary index card and context menu.

E-mail Addresses and Web Sites: Click on an e-mail hyperlink to create a new e-mail in your e-mail client. Click on a URL to open the Web page in your Web browser.

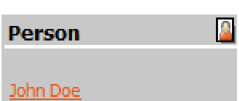
Note: For Internet addresses that do not begin with "www", add the "http://" prefix to the address. Otherwise the address is not interpreted correctly and you receive an error message.

Documents: Click on the hyperlink in a document field to open the document in your word processor.

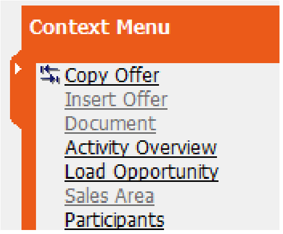


Associated Records: You can switch to associated records by clicking on hyperlinks in some masks.

Summary Index Card: Click on a hyperlink in the summary index card to access the parent info areas, see Summary Index Card.



Context Menu: Click on a hyperlink in the context menu to access levels, workflows, dashboards etc., see Context Menu on page 142.

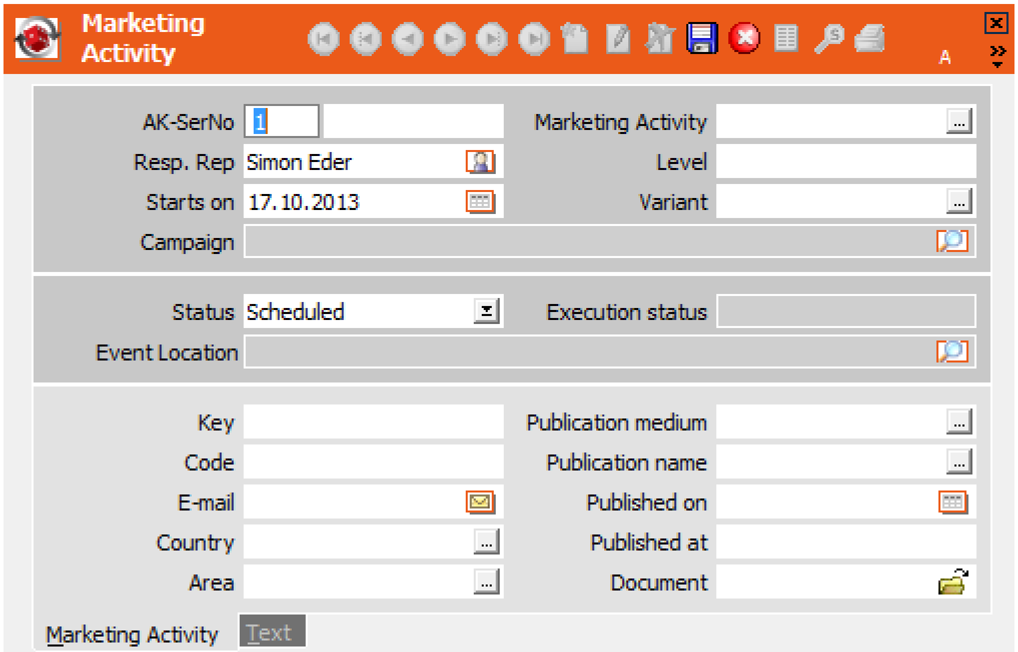


Masks

There are two view modes in Aurea.CRM win: mask and list.

The mask is Aurea.CRM win's central viewing and input medium. It corresponds to a printed form on which data are entered.

Click (**Mask**) in the command bar. This switches the view from list view to mask view.



The following mask options are available in the **View** menu:

- **Standard Mask:** The last standard mask used is loaded, see Standard Masks.
- **Custom Mask:** The last custom mask used is loaded, see Custom Masks.
- **All Mask Fields:** Displays all fields of a level, see All Mask Fields.
- **Load Mask:** Accesses masks that your administrator has defined, see Saving, Loading and Deleting Formats.

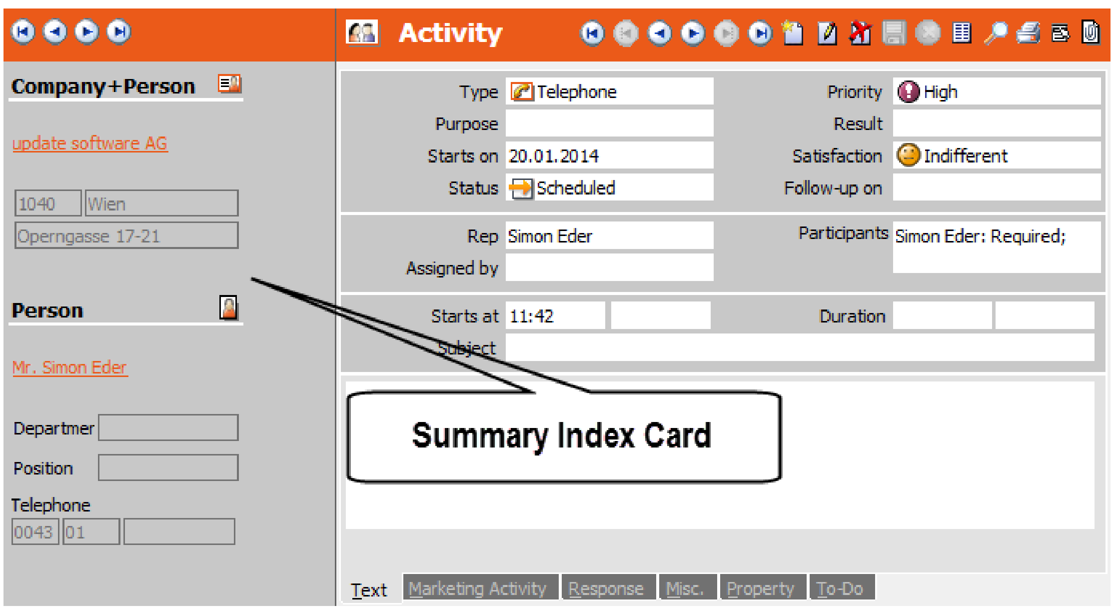
- **Original Mask:** Loads the original mask. If the original mask is already selected, this option is disabled.
- **Load Summary Index Card:** Loads a summary index card defined by your administrator.
- **Load Original Summary Index Card:** Loads the original summary index card. If the original summary index card is already selected, this option is disabled.

Masks can be customized, see Custom Masks and **User Interface** in the Aurea.CRM win Administrator Guide.

The selected view options are saved for each module in the user directory (e.g. in **pro1.cfg** for the main module of Aurea.CRM win). These settings are reloaded next time you start Aurea.CRM win and take precedence over the settings in the loaded desktop or dashboard.

Summary Index Card

In a dependent info area, data from the parent record is displayed to the left in the summary index card.



Use the arrows at the top of the summary index card to navigate between both parent records (companies and persons in the example above) and child records (activities in the example).

To switch to the parent record, click on a link in the summary index card.

Standard Masks

By default, the standard mask is opened:

- either the original mask (defined by Aurea; cannot be edited or deleted)
- or a mask designed by your administrator in the Mask Generator, see Mask Generator in the *Aurea.CRM win Administrator Guide*

The **Standard Mask** option in the **View** menu is enabled.

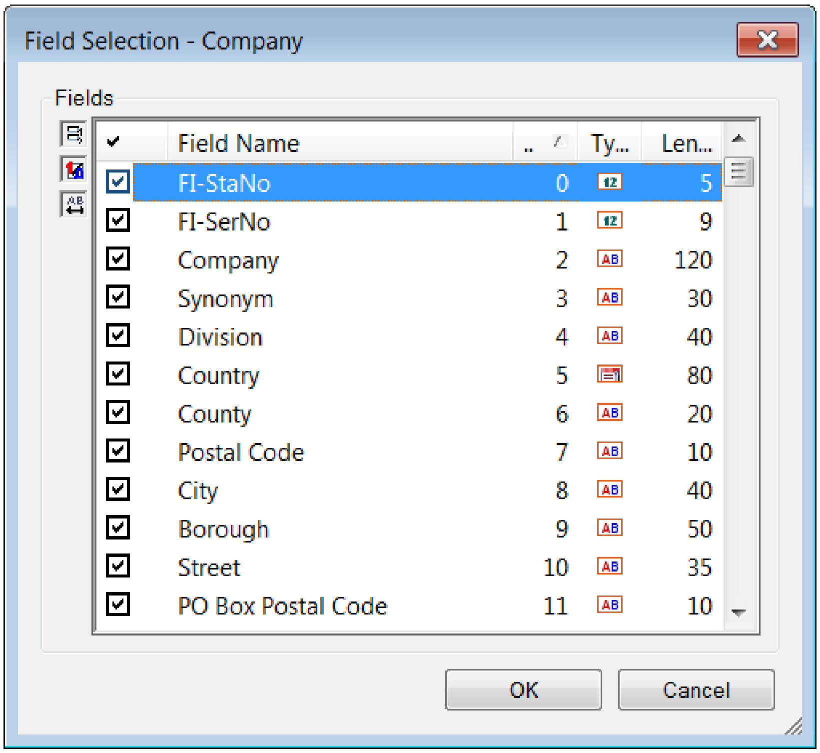
Note: Your administrator can determine that masks are displayed differently based on the contents of the record (so-called "filter masks"), see Filter Masks Tab in the *Aurea.CRM win Administrator Guide*. For example, different fields can be displayed based on the status of a customer.

Custom Masks

You can define custom masks specially adapted to your specific requirements. To define a custom mask for an info area:

1. Switch to the info area.
2. Select **View > Custom Mask** from the menu. The custom mask is displayed.
3. Select **View > Load Mask Fields**.

   The **Field Selection** is displayed:



4. To add or remove a field, enable or disable the corresponding check box.
5. Click **OK**.
6. Select **View** > **Save Custom Mask** from the menu.
7. Enter a name for the mask and click **OK**.

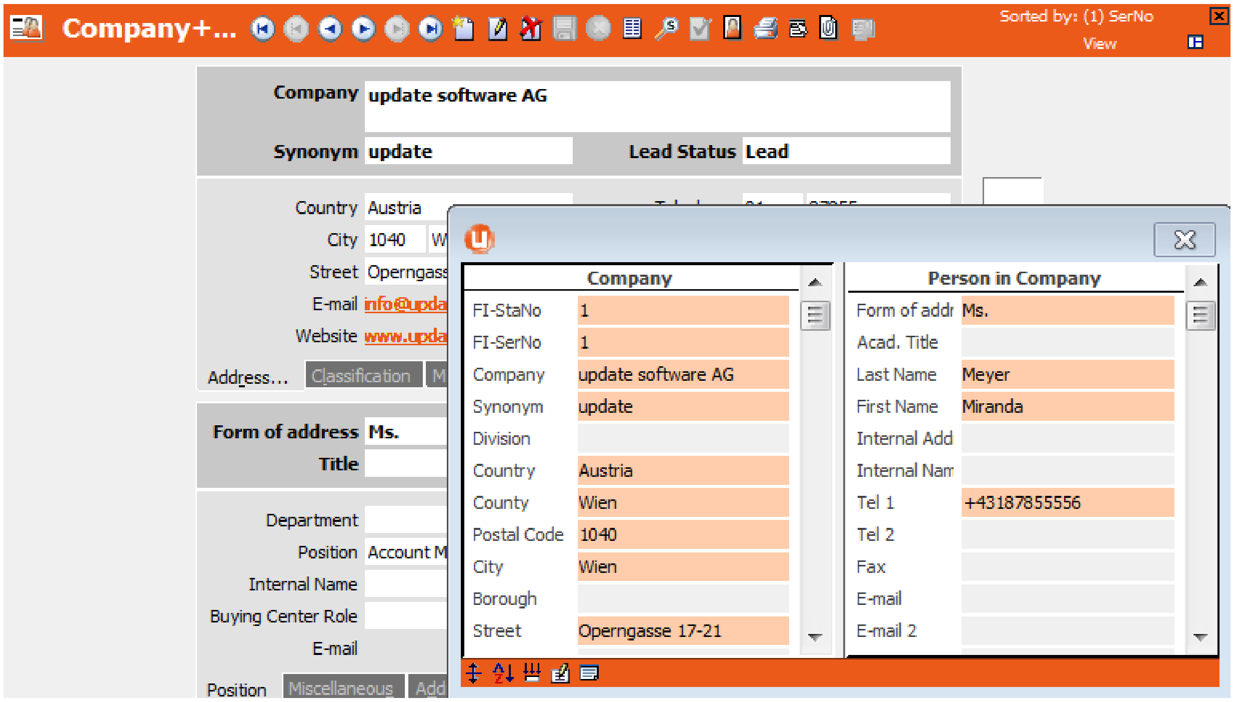
To load a custom mask:

1. Select **View** > **Load Custom Mask** from the menu.
2. Select the desired mask.
3. Click **OK**.

Masks can also be deleted, sent to other users or access can be denied to other users, see Saving, Loading and Deleting Formats.

All Mask Fields

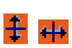
Select **View > All Mask Fields** from the menu. A window opens containing all the level's fields.



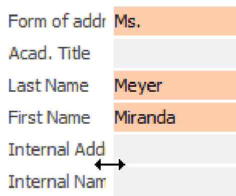
Note: You can edit data both in the mask and in the window containing all fields.

Customizing the Display

These commands are available from a row of buttons when displaying the custom mask and all mask fields.

	Arrange horizontally/vertically (in levels containing more than one info area, e. g. **Company+Person**).
	Sort fields alphabetically/by number.
	Load all fields, see System Fields on page 260.
	Show last change / Show field contents.
	Show fields with content only / Show all fields.

Drag the left field border to the right, if the field name is truncated:



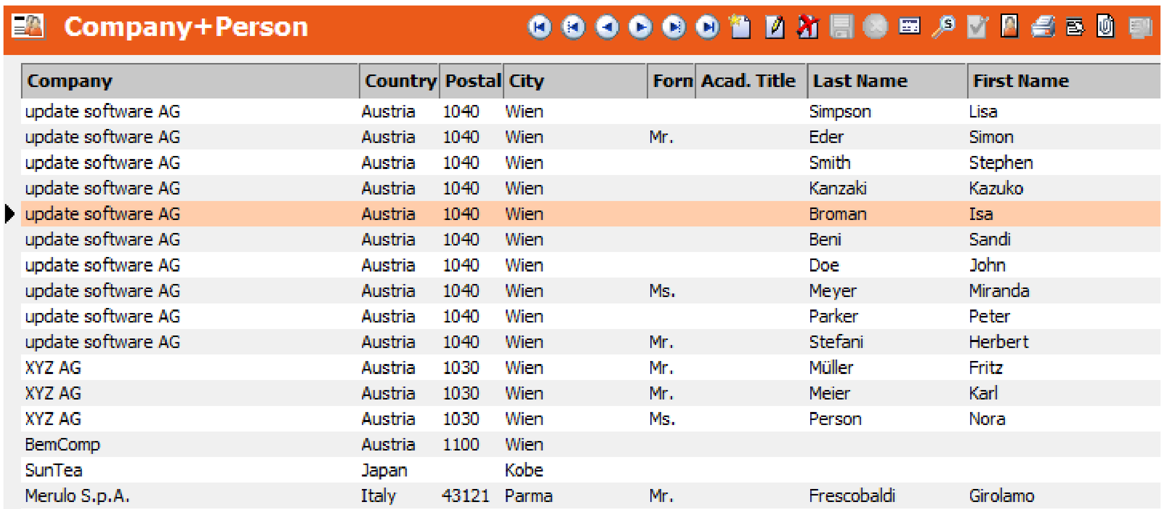
To display the info area abbreviations, field numbers and field types:

Double-click on the header with the right-mouse button. Double-click on the header again to stop displaying this information.

Lists

The list view displays records in a list.

Click (**List**) in the command bar to switch to list view.



Company	Country	Postal	City	Forn	Acad. Title	Last Name	First Name
update software AG	Austria	1040	Wien			Simpson	Lisa
update software AG	Austria	1040	Wien	Mr.		Eder	Simon
update software AG	Austria	1040	Wien			Smith	Stephen
update software AG	Austria	1040	Wien			Kanzaki	Kazuko
update software AG	Austria	1040	Wien			Broman	Isa
update software AG	Austria	1040	Wien			Beni	Sandi
update software AG	Austria	1040	Wien			Doe	John
update software AG	Austria	1040	Wien	Ms.		Meyer	Miranda
update software AG	Austria	1040	Wien			Parker	Peter
update software AG	Austria	1040	Wien	Mr.		Stefani	Herbert
XYZ AG	Austria	1030	Wien	Mr.		Müller	Fritz
XYZ AG	Austria	1030	Wien	Mr.		Meier	Karl
XYZ AG	Austria	1030	Wien	Ms.		Person	Nora
BemComp	Austria	1100	Wien				
SunTea	Japan		Kobe				
Merulo S.p.A.	Italy	43121	Parma	Mr.		Frescobaldi	Girolamo

The current record is highlighted and indicated by a triangular cursor in the control bar.

Double-click on a record to display it in the mask view.

The following list options are available in the **View** menu:

- **Define List Format:** Opens the **Define List Format** dialog box, see Defining Lists
- **Load List Format:** Loads an existing list format, see Saving, Loading and Deleting Formats.
- **Totals Line:** Displays or hides the total line.

Lists can be customized, see Defining Lists and **User Interface** in the Aurea.CRM win Administrator Guide.

Note: The selected view options are saved for each module in the user directory (e.g. in **pro1.cfg** for the main module of Aurea.CRM win). These settings are reloaded next time you start Aurea.CRM win and take precedence over the settings in the loaded desktop or dashboard.

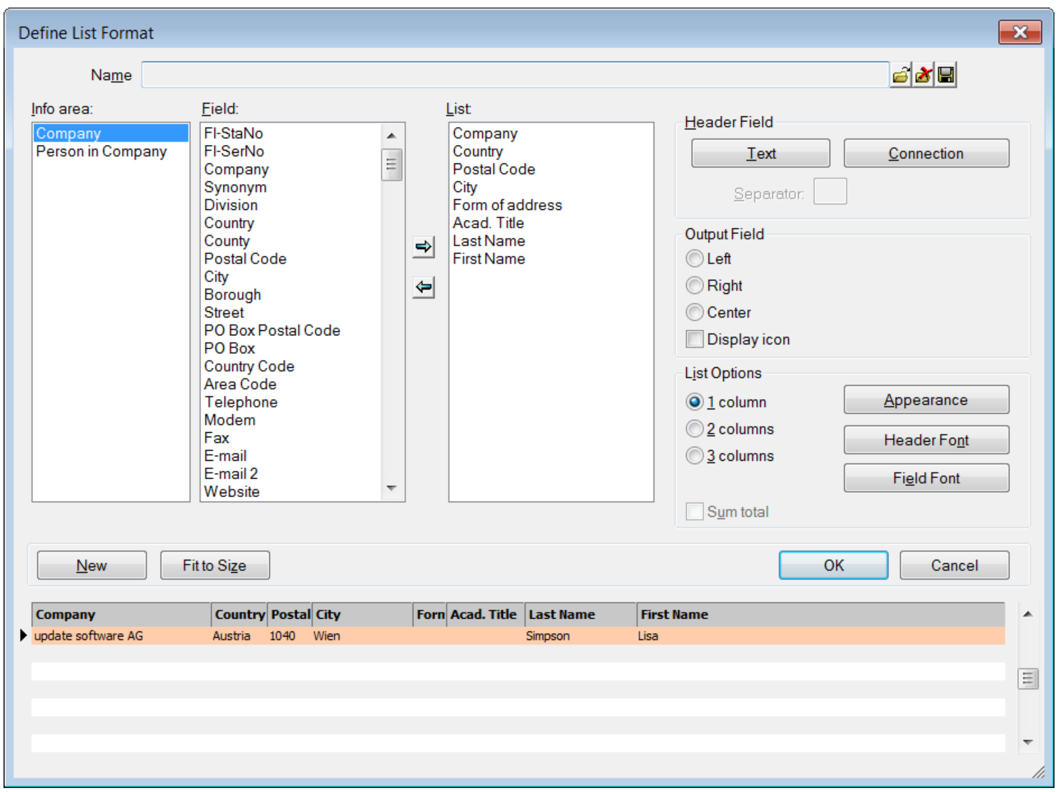
To prevent user settings from being reloaded enable the **Do not load last list settings** option in the desktop settings, see Masks/Lists Tab in the *Aurea.CRM win Administrator Guide*.

Defining Lists

All fields available in a level can be included in a list in any order.

To define a list:

1. Switch to the list view.
2. Select **View** > **Define List Format** from the menu. The **Define List Format** dialog box opens



3. If the current level contains more than one info area, select the desired info area from the list under **Info area**. The fields available in the info area are displayed under **Field**.

Note: Enable the **Sort selection lists alphabetically** option under **Extras > Other Options** in the Aurea.CRM win main module to sort the fields alphabetically.

4. Double-click on a field to add it to the list. Double-click on the field again to remove it from the list.

   The bottom portion of the dialog box provides a preview of the selected fields and settings.

5. To change the column order, click on a column header in the preview and drag it to the desired position.
6. To change the column width, click on the divider between columns and drag it to the desired position.

   Note: You can also edit the column width and order in the list view.

7. Define more view settings for the list, see List Properties.
8. Click **OK**.
9. When prompted:
   - Select **Yes** to save the list format, see Saving, Loading and Deleting Formats.
   - Select **No** if you want to use the list only temporarily.

List Properties

You can set the following list options in the **Define List Format** dialog box:

- **Fit to Size:** Changes the column width so that all columns are displayed.
- **New:** Clears the field selection (**List** list box).

Header Field

- **Text:** Select a field in the **List** list box. Click on **Text** to change the column header text for all available languages.

Connection: Use the **Connection** button to display up to three fields in one column.

1. Select a field in the List list box.
2. Click the Connection button.
3. Select the second field.
4. Confirm with OK. The list view now displays two fields in one column.

- **Separator:** Enter a character to separate connected fields.

Output Field

- **Left, Right, Center:** Determines the alignment of a field's contents. Select a field from the **List** list box and choose the desired alignment.

Display icon: Select this option to display the contents of catalog fields using the corresponding icon.

Note: Displaying icons can cause the list to take longer to be generated when working with large volumes of data.

You cannot connect fields displayed as icons to other fields in the list. Catalog fields that are displayed as items cannot be edited in list view. Select the same catalog field a second time from the **List** list box to display both the icon and the text.

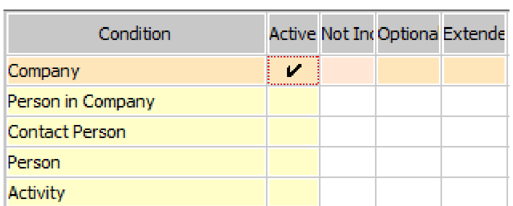
List Options

- **Columns:** The list can be displayed as one or split into two or three columns.
- **Sum total:** Enable the **Sum total** check box to display a line at the bottom of the list that contains totals. This option can only be selected if the list contains numerical fields.
- **Appearance:** Click on the **Appearance** button to determine the following:
  - **Border:** Displays the control bar on the left, right or both sides.
  - **Selected Records:** Highlights the current line using a colored bar or frame.
  - **Cursor:** Position of the triangular cursor on the left and/or right control bar.

- **Header Font:** Use the **Header Font** button to set the font used to display the column headers.
- **Field Font:** Use on the **Field Font** button to set the font used to display the list contents.

Tables

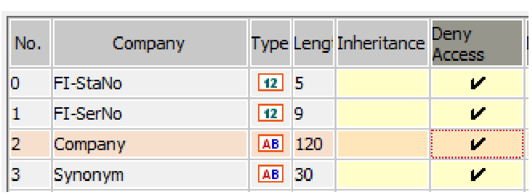
Certain areas in Aurea.CRM win (selections, rights definition etc.) involve entering data in tables.



Condition	Active	Not Inc	Optiona	Extende
Company	✔			
Person in Company				
Contact Person				
Person				
Activity				

You can click in cells with a yellow background to change settings.

The active cell's background is orange.



No.	Company	Type	Leng	Inheritance	Deny Access
0	FI-StaNo	12	5		✔
1	FI-SerNo	12	9		✔
2	Company	AB	120		✔
3	Synonym	AB	30		✔

Click on a column header to change the sort order or to enable or disable the entire column.

Adding rows

To add a new row, click in the first free cell (with a yellow background) in the final row.

Deleting rows

To delete a row, double-click in the first column in the row.

Hierarchic Levels

You can edit multiple linked records of the same type in a hierarchic level.

Hierarchic levels are available by default for the **Ticket** and **Installed Base** (BTB and OTC only) info areas. Your administrator can define hierarchic views for other info areas, see Defining Hierarchic Levels in the *Aurea.CRM win Administrator Guide*.

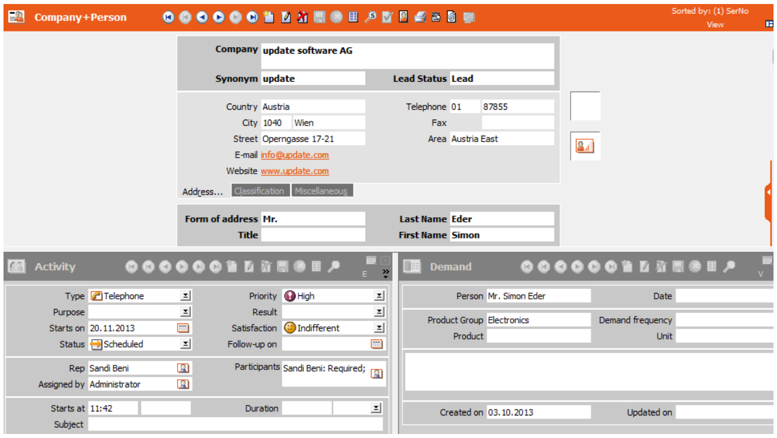
To edit a record in a hierarchic level:

1. Select **Hierarchy** from the context menu to open the hierarchic level for a record. The current record and all linked records are displayed in tree form.
2. You can edit the hierarchy using the following options:
   - Edit records in the mask.
   -  (**New**): Adds a new sub-record to the currently selected record.
   -  (**Edit**): Opens the selected record in the mask for editing.
   -  (**Delete**): Deletes the current record (and all its sub-records).
   - Use the mouse to move records within the hierarchy (you may need to hold down the mouse button for a while before you can move the record).

Integrated View

Learn how to view info areas linked to other info areas in an integrated view.

The **Company, Person** and **Properties** (BTB only)info areas are linked to various dependent info areas; e.g. **Activity, Note, Order** etc. These relationships can be displayed in Aurea.CRM win's integrated view, with parent and child info areas are displayed in the same window.



Note: Up to five dependent info areas can be displayed at once.

Inactive areas are displayed with a gray header.

Your administrator can determine that all levels are opened in integrated view (configure in the interface settings, see Misc. Tab (**Open all info areas in integrated view** option) in the *Aurea.CRM win Administrator Guide*.

Removing Info Areas from the Integrated View

To remove a dependent info area from the integrated view:

1. Click on the relevant info area.
2. In the integration bar, click the separate window button () or press F3.

The info area now appears in full-screen view. The corresponding name is displayed in the **Window** menu.

Note: The **Open all info areas in integrated view** option is not affected by this procedure. If you have chosen to display an info area on its own and open another child info area, the child is opened in integrated view.

To add an info area to the integrated view again:

1. Switch to the info area.
2. Click on (**Integrate**) in the level header or press F3.

The info area is integrated in the integrated view of the parent info area.

Arranging and Resizing Integrated Info Areas

To change the size of an info area, move the appropriate divider using the mouse.

To change the layout of the info areas, click on (**Horizontal**) or (**Vertical**) in the parent info area's header. The parent info area is either displayed at the top or on the left.

You can reposition dependent info areas in the integrated view using the mouse:

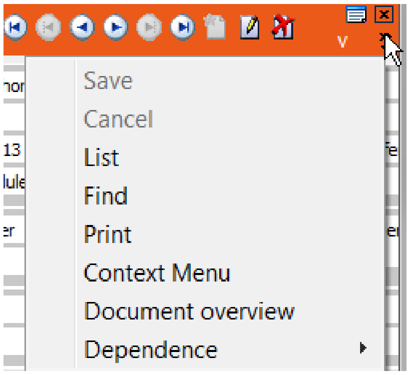
1. Click in an empty part of the info area's mask and hold down the mouse button.
2. Drag the info area to the desired position on the screen. The info area is displayed transparently whilst being moved.

Click on the **Close** button in the level header to close the corresponding info area, or press F4.

Your administrator can determine that a small red arrow is displayed between parent and child info areas, in order to highlight the relationships between records, see Misc. Tab (**Show info area relationships indicators** option)in the *Aurea.CRM win Administrator Guide.*

Command Bar in the Integrated View

In some cases, the info area's windows are not large enough to display all the command bar's buttons in the integrated view. Click on the arrow button on the right side of the level header to access a popup menu containing the missing options.



Managing Appointments

Learn how to manage appointments.

The following areas are used to manage appointments:

- Calendar, see Calendar on page 156
- Resources, see Resources on page 169
- Daily overview, see Daily Overview on page 172

Aurea.CRM uses three types of appointments: Activities, tasks and absences, see Appointment Types.

You can add appointments from the following areas:

- The calendar, see Calendar on page 156
- In the resource view, see Adding, Editing and Deleting Appointments
- In the daily overview (only activities), see Buttons in the Daily Overview Level.
- In the corresponding info areas, see Appointment Types
- You can check for collisions between activities when adding new ones, see Overlapping Appointments on page 173

  The following options are available for existing appointments:

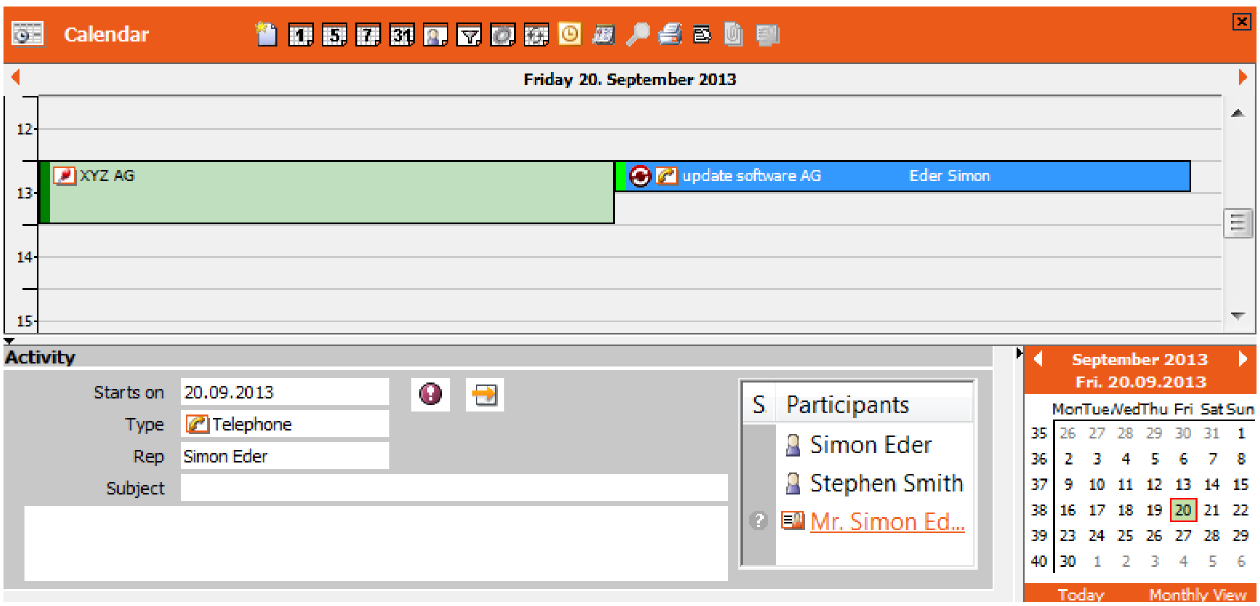
- You can subsequently add participants to an appointment, see Adding Reps and Resources to an Activity/Task and Adding Customers to an Activity.
- You can send To-Do records to participating reps if they need to confirm their attendance or approve an absence, see To-Dos on page 185.

- You can also display reminders for activities and messages concerning refusals or the rescheduling of activities, see Reminders and Messages on page 189 and To-Do Escalation.
- You can structure tasks as projects including sub-projects, see Structuring Tasks.
- Appointments can be transferred to and from Microsoft Outlook and Lotus Notes, see Transferring Appointments to Microsoft Outlook or Lotus Notes.

Calendar

The calendar allows you to display and create activities, tasks, absences and to-dos.

To open the calendar, click on **Calendar** on the icon bar or select **Info** > **Calendar** from the menu. The view that is selected the last time Aurea.CRM win is shut down is displayed (in this case, the working week view).



The following command bar is displayed in the **Calendar** info area:

The command bar is used to determine which appointments and information you want to display and to distribute appointments. Select the **Daily View**, **Working Week View**, **Weekly View** or **Monthly View** using the corresponding button**.**

- More details on the selected appointment are displayed at the bottom left. A list of participants is also displayed for activities.

Note: You cannot edit the record from here.

- A small calendar is displayed at the bottom right, see Small Calendar. Click on a day to switch the view to that day.
- You can hide and display the mask and small calendar using the small arrows:

Calendar Views

- **Daily View** (): Displays a single day.
- **Working Week View** (): Displays a working week.

Note: The duration of a working week is defined in the calendar settings, see Calendar Interface Settings.

Weekly View (): Displays a week.

- **Monthly View** (): Displays a month.

The current day is highlighted in the weekly and monthly views.

- **Resources** (): Switches to the resource view, see Resources on page 169.

Browsing

Use the left and right arrows in the header to navigate forwards and backwards.

Use the scroll bar to the right of the weekly and monthly view to move forwards and backwards.

Creating an Appointment

To create an appointment:

1. Double-click on an empty area in the calendar to add a new appointment. A dialog box is displayed.
2. Click on a hyperlink to determine which type of appointment you want to add.

   Note: Your administrator can define templates used by new activity records, see Special Case: New Templates in the Calendar in the Aurea.CRM win Administrator Guide.

3. If you added an activity, the company search is displayed. Search for the company and person you wish to add a new appointment for, see Searching on page 43.
4. Enter data in the desired fields, see Appointment Types and To-Dos on page 185.
5. Save.

The appointment is displayed in the calendar.

Modifying or deleting an Appointment

To edit or delete an appointment:

1. Double-click on an appointment.
2. Edit the appointment as desired.

To take into account the availability of resources, click on (**Resources**) to switch to the resource view, see Resources on page 169.

To reschedule an appointment, drag the appointment to the desired time using the mouse.

To change an appointment's duration, drag the appointments border to the desired position.

Note: You cannot change the duration of To-Do records.

Selecting Appointments with the Keyboard

To select appointments using the keyboard:

Daily and Working Week View

1. Use the up and down keys to move the cursor within the calendar. Use the left and right cursor keys to switch between individual days.
2. Once you have highlighted a time that contains an appointment, press the Tab key. If there are several appointments scheduled at this time, use the Tab key to scroll through all the appointments. The appointment's details are displayed below the calendar.

Weekly and Monthly View

1. Use the arrow keys to move the cursor from one day to another.
2. Use the Tab key to switch between appointments on the selected day.

Appointments Lasting Several days in the Daily and Working Week View

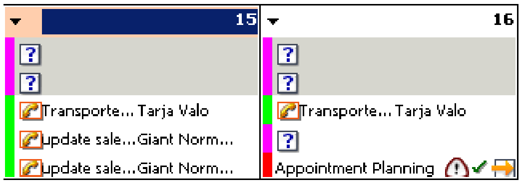
1. Use the Page Up and Page Down keys to select appointments that last for several days in the daily and working week view.
2. Use the Tab key to switch to the appointment or position on the calendar that is last selected.

Appointments Lasting Several Days in the Weekly and Monthly View

Appointments lasting several days are selected the same way as appointments lasting one day.

Appointment Duration and Type

The duration of an appointment is indicated using a vertical bar in the weekly and month views.

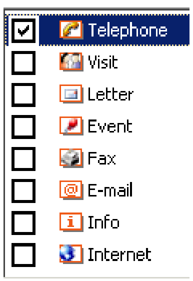


The color of the time bar indicates the type of appointment (activity, task, absence or to-do).

The duration is also indicated using a vertical bar in the daily and working week views.

Activities

For activities, the type is indicated using one of the following icons:



Activity records that are part of a series of appointments are additionally indicated using the icon, see Recurring Activities on page 182.

Tasks

The status of a task is displayed as default.

Open	Completed/Approved	Assigned/In Progress	Missed

Absences

The status of an absence is displayed as default.

Open	Accepted	Denied	– not relevant

To-Dos

The participation type, participation status and status are indicated for To-Do records.

Part Type:

! Required	? Optional	i Informational

Participation status:

Open	Accepted	Denied	– not relevant

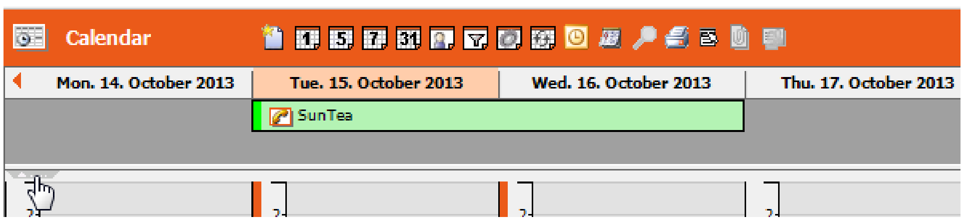
Status:

Open/In Progress	Show	Complet-ed	Missed/Aborted

Note: Text and colors can be changed using either the **Settings** button or in the desktop settings, see To-Do Escalation and **Desktop** in the Aurea.CRM win Administrator Guide.

All-day Appointments

Appointments lasting for a whole or several days are displayed beneath the date in the daily and weekly views:



Your administrator can determine how much space is available by default for appointments lasting the entire day, see Configuration Info Area (**Calendar** category, **Maximum lines for all day-appointments** option)in the *CRM.core Administrator Guide*.

Click on to close this area; appointments lasting all day are indicated with a dot beneath the date:

Click on to display the appointments again.

All-day appointments are shaded gray in the weekly and monthly views.

Small Calendar

The small calendar is located in the bottom right of the appointment view. You can also open it as a popup calendar using the **Popup Calendar** button ( ) in the command bar.

The calendar weeks are displayed on the left. The current day is highlighted. Public holidays can also be displayed in a different color, see Calendar Interface Settings.

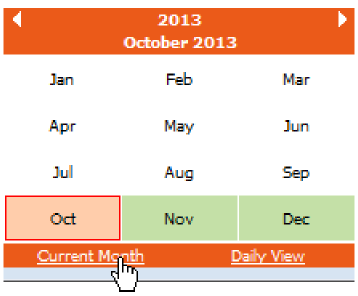
Click on a day in the calendar to switch the display to that date.

Use the arrows in the small calendar's header to move forward or backward by one month.

The small calendar is updated if you navigate in the main calendar and vice versa.

Click on the following links to change the small calendar's display:

- **Today:** Switches to the current date.
- **Monthly View:** Switches to the monthly view.



- **Current Month:** Switches to the current month (available in monthly view).
- **Daily View:** Returns to the daily view.

The following options are available when the popup calendar is open:

- Use the Esc key, the Return key or the Tab key to close the popup calendar.
- Use the arrow keys to select and display a date.
- Use the Home key to switch to the current date.
- Use F2 to switch between the small calendar's daily view and monthly view.
- If you use the popup calendar to select a day, the focus changes to that day and the popup calendar is closed immediately.

Context Menu

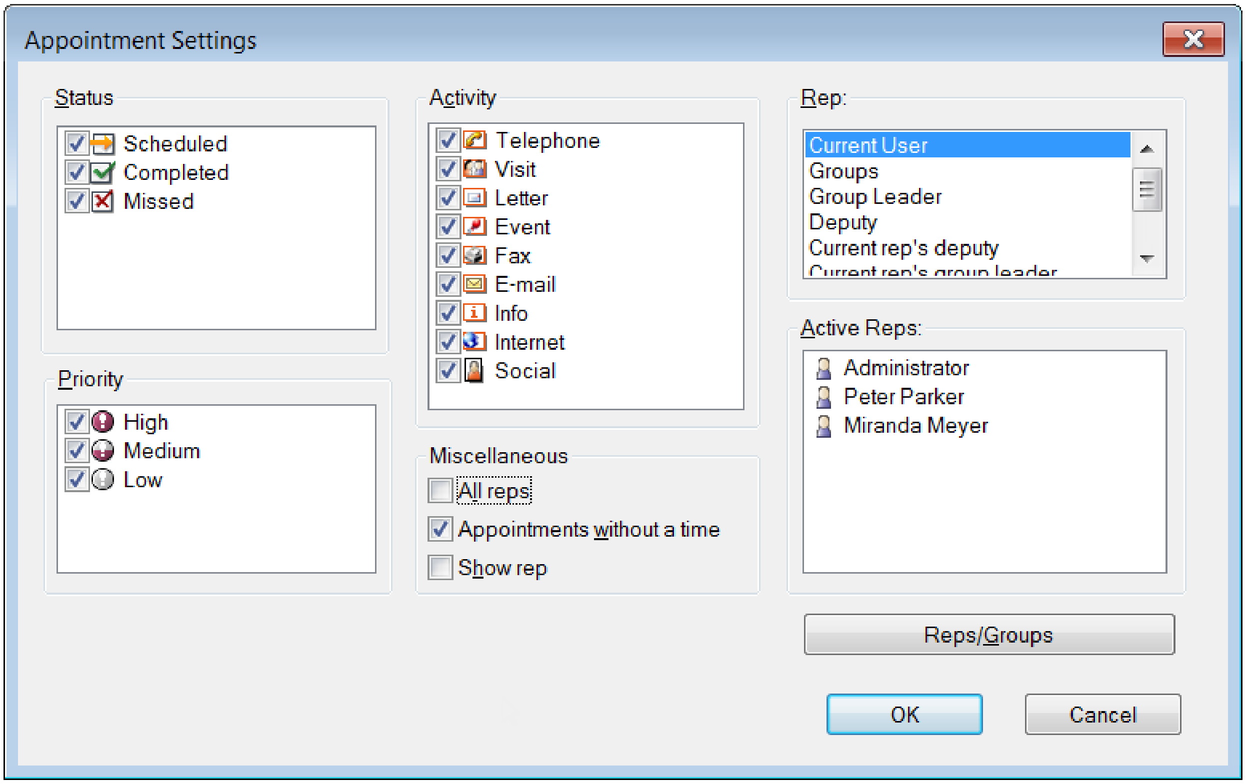
Depending on the type of record, various options are available from the popup menu in the calendar:

- **Accept:** Accepts an appointment.
- **Refuse:** Refuses an appointment.
- **Completed:** Sets the status of a To-Do record to "Completed", see To-Dos on page 185.

- **Execute:** Executes a trigger or workflow.
- **Load:** Switches to the corresponding record.

Appointment Settings

Click on (**Filter view**) to determine which appointments you wish to display.



- **Status**, **Priority** and **Activity:** Determine which activities are displayed.
- **Rep:** Choose which rep's appointments to display: your own appointments, those of your group, your group leader or the rep for whom you have been entered as deputy.
- **Reps/Groups:** Opensthe rep list. Select the reps whose appointments you wish to be displayed from the list, see Rep List on page 257. The selected reps are displayed in the **Active Reps** field.

Note: If you do not select any entries under **Rep** or **Active Reps**, appointments are displayed for all reps. If you select an entry from one of the lists, only the corresponding appointments are displayed.

Your administrator can determine which reps' appointments should be displayed. In this case, the **Rep** and **Active Reps** lists are unavailable, see Calendar Tab in the *Aurea.CRM win Administrator Guide*.

- **All reps:** Displays the appointments for all reps (only applies to the calendar).
- **Appointments without a time:** Includes appointments for which no time has been entered.

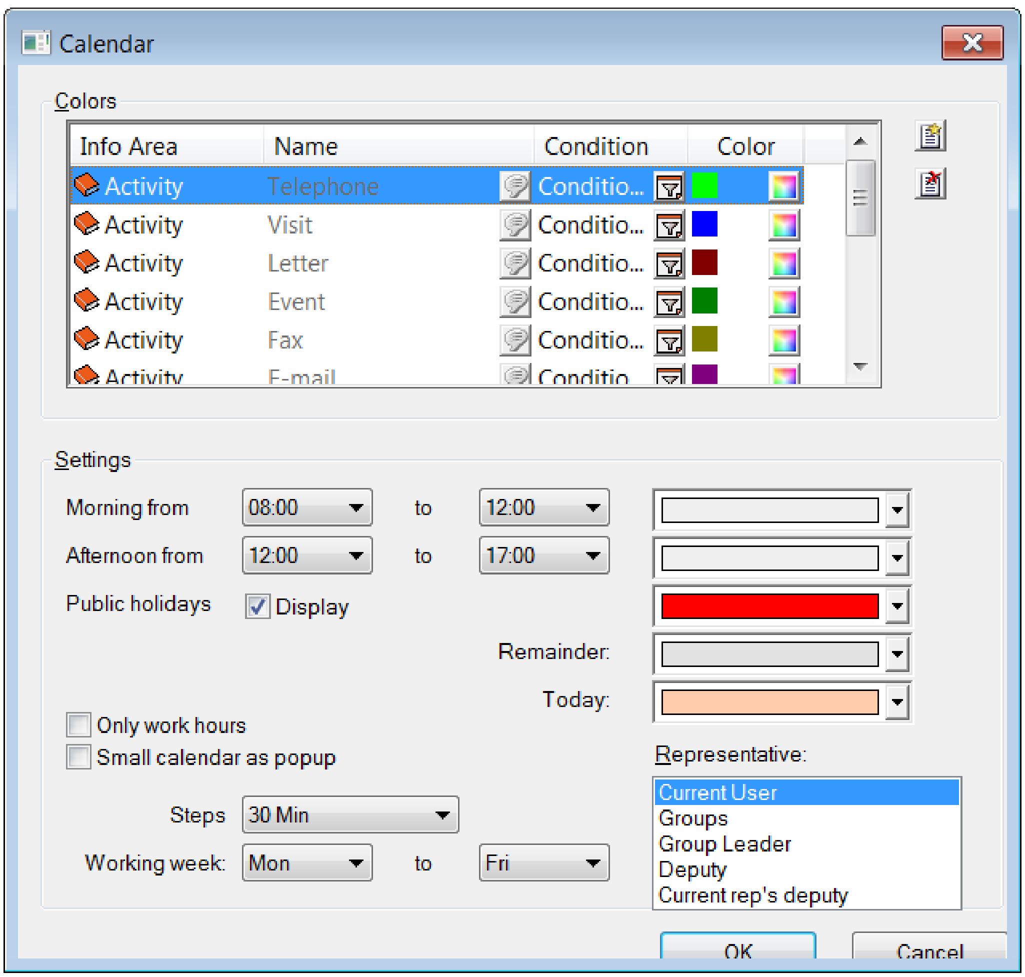
- **Show rep:** Displays the selected reps in the overview's header (only applies to the calendar).
- **Scheduled appointments:** Days on which appointments are scheduled are highlighted in a different color (only applies to the **Daily Overview**).

These settings are saved for each level, i.e. you can define different settings for the calendar, resource view, overlapping appointments and daily overview.

By default, only those appointments are displayed where the selected rep(s) are entered in the **Rep** or **Participants** fields. Use the **Own appointments/activities/tasks only** configuration entries to ignore the **Participants** field, see Configuration Info Area (General Settings category, **Own appointments/activities/tasks only** option)in the *CRM.core Administrator Guide*.

Calendar Interface Settings

If you have the appropriate rights, click on (**Settings**) to change the calendar's settings and appearance. For example, you can change the colors used to display different types of activities. These personal settings take precedence over the desktop settings defined by your administrator; i.e. they are reloaded every time you log on to Aurea.CRM win.



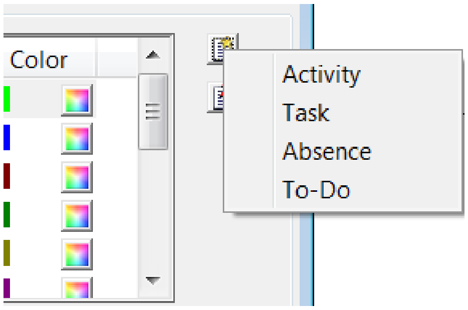
These settings are saved for each level, i.e. you can define different settings for the calendar, resource view, overlapping appointments and daily overview.

Colors Pane

Use this option to change the colors used to display different types of appointments. A stripe in the chosen color is displayed on the left hand side of the appointment.

To change the color of an appointment type:

1. Click on the **New** button, and select the appointment type from the popup menu.

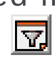


2. You are presented with a window prompting you for a name. Enter a name, e.g. "Visit", and click **OK**.
3. Define the condition, e.g. "Type = Visit" and "Priority = High", see Conditions.

Note: Instead of executing steps 1-3, you could also edit the predefined entry for activities of type = "Visit", and add the condition "Priority = High".

4. Click on the **Color** icon and select the desired color (e.g. yellow).
5. Close the dialog box with **OK**.

Visits with the priority "High" is now displayed with a yellow stripe in the **Calendar** info area.

For those colors that have already been defined in the **Colors** pane, click the  icon to enter the text in several languages, the  icon to edit the condition and the  icon to change the color.

Note: You can only change the condition and color for entries defined by your administrator in the desktop settings. The text (in the **Name** column) is displayed in gray and cannot be edited.

Settings Pane

The options in the **Settings** pane allow you to change the following:

- **Morning from/to:** Select the time range you wish to be displayed as morning in the two time fields, and select a color from the adjacent field.
- **Afternoon from/to:** Select the time range you wish to be displayed as the afternoon in the two time fields, and select a color from the adjacent field.
- **Public holidays:** Enable the **Display** check box, and select a color for public holidays.
- **Remainder:** Select a color to represent those times outside your morning or afternoon office hours.

- **Today:** Select the background color for the current date.
- **Only work hours:** Restricts the view to the morning and afternoon periods defined in the settings.
- **Small calendar as popup:** If this check box is enabled, then the small calendar is only accessible using the **Popup calendar** button in the calendar's command bar.

If this check box is disabled, the calendar is always displayed at the bottom right of the **Calendar**.

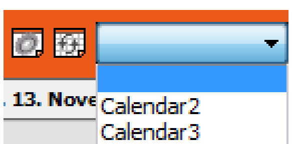
- **Steps:** This field allows you to specify whether the time is divided into 15 minute, 30 minute or hourly intervals.
- **Working week/to:** Use these fields to determine which days of the week are part of the working week.
- **Representative:** You can specify whose records are displayed in the calendar (the current rep, the entire group, the group leader or deputy).

You can select multiple entries. If you do not select an entry, appointments are displayed for all entries.

Note: Your administrator can determine which reps' appointments should be displayed, see Calendar Tab in the Aurea.CRM win Administrator Guide.

Predefined Views

Your administrator may have provided predefined views. Select these views using the drop down menu in the command bar form the **Calendar** info area.



Printing Appointments

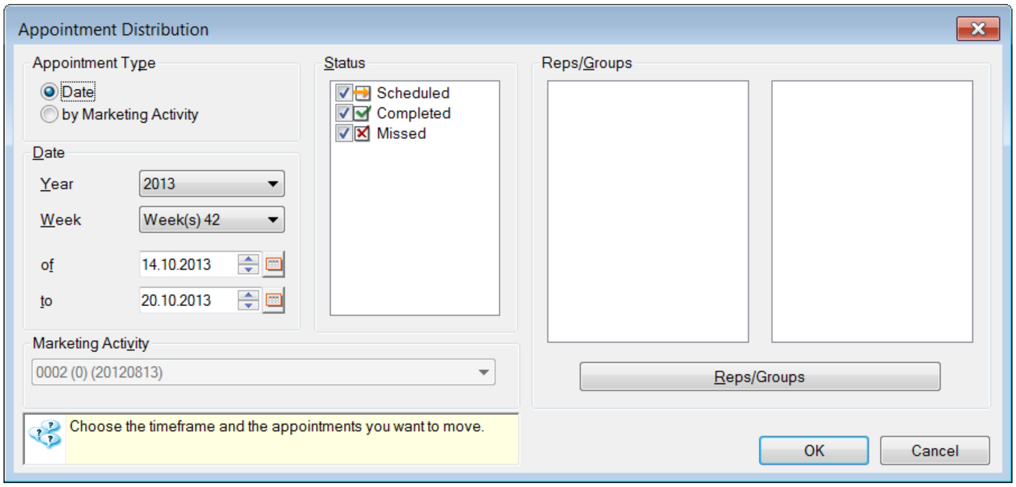
To print the appointments displayed in the calendar:

1. Select **File > Print** from the menu.
2. Select at least one of the following options:
    - **Print calendar:** Prints the current calendar view.
    - **Print activity list:** Prints a list of all activities in the current view.
    - **Print compact overview:** Prints an overview of the current appointments.

Distributing Appointments

Use the distribute function to move several appointments to a different date.

1. Click on the **Distribute** button to access the **Distribution of Appointments** level. The **Appointment Distribution** dialog box is displayed.



2. Determine which appointments should be rescheduled:
   - **Date:** All the selected rep's appointments in the specified time range. Select the **Year** and **Week** from the drop-down lists or enter the time period in the **of** and **to** fields.
   - **by Marketing Activity:** All activities that are generated as part of a marketing activity. Select the desired marketing activity from the **Marketing Activity** drop-down list.

3. Select the status of the activities to be rescheduled under **Status**.
4. Select one or more reps or groups that the appointments should be distributed amongst under **Reps/Groups**. Click the **Reps/Groups** button to access the rep list, see Rep List on page 257.

   If you do not select a rep or a group, the appointments for all reps are distributed.

   Note: You can only distribute your own appointments in the default configuration. Your administrator can determine that you can also distribute appointments assigned to other reps, see Defining Further Settings in the Rights topic of the *CRM.core Administrator Guide*.

   ---

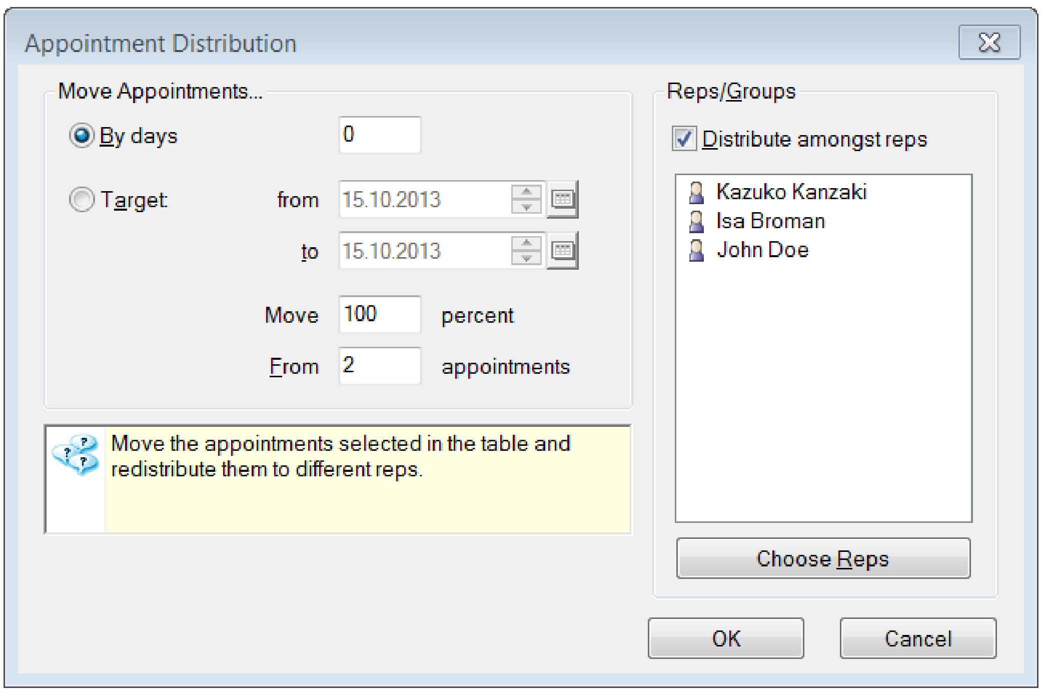
5. Confirm your selection with **OK**.

   The **Distribution of Appointments** level is displayed. The numbers in the cells indicate the number of activities of each type.

Date	Status	Total	Telephor	Visit	Letter	Event	Fax	E-mail	Info	Internet	Social	
Sum	Scheduled	2	1	1								2
	Completec											
	Missed											
Mon. 07.10.2	Scheduled											
	Completec											
	Missed											
Tue. 08.10.2	Scheduled											
	Completec											
	Missed											
Wed. 09.10.2	Scheduled	2	1	1								2

You can select **Appointments** from the context menu to edit your settings.

6. Select **Distribute** from the context menu. A further dialog box is displayed.



7. Choose your settings:

   Move Appointments pane:

   - By Days: Enter the amount of days that appointments should be moved by.
   - Target from/to: Define the time period over which the appointments should be distributed.
   - Move … percent: You can specify a percentage of appointments you wish to move. The selected appointments are weighted according to their priority, however.
   - From … appointments: The amount of appointments selected is automatically entered by the system. You can edit this field.

Reps/Groups pane:

- Distribute amongst reps: Enable the check box, and select the reps you wish to distribute the appointments amongst from the rep list, accessed by clicking Choose Reps, see Rep List on page 257. You can select multiple entries. If this check box is disabled, the appointments are distributed to the rep who is assigned to the original activity record.

8. Use **OK** to confirm your settings and to begin distributing the appointments.

   You return to the distribution table where you can review the results.

9. Return to the calendar using the **Close** button. The display is updated to reflect any changes.

Rescheduling a Single Appointment Directly

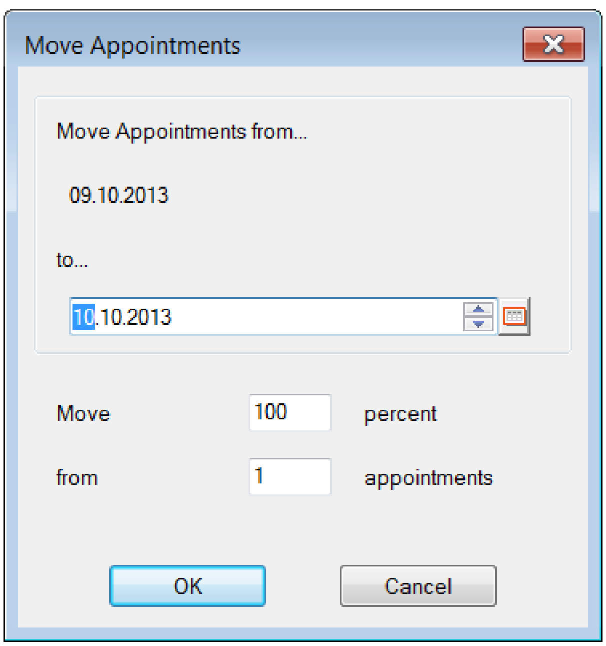
Appointments can be rescheduled directly in the **Distribution of Appointments** level.

1. Double-click on the appointment to be rescheduled.

   The mouse cursor changes.

2. Click on the date you want to move the appointment to.
3. The **Move Appointments** dialog box opens.



4. Enter the appropriate settings and confirm with **OK**.

The appointment is rescheduled.

Note: You cannot reschedule appointments whose status is set to "Completed".

Transferring Appointments to Microsoft Outlook or Lotus Notes

Depending on the settings in the **Configuration** info area, either the **Outlook** ( ) or **Lotus Notes** button ( ) is displayed, see Configuration Info Area in the *CRM.core Administrator Guide* (**External Calendar** category, **External Calendar** option). Click on the button to transfer the displayed appointments to your mail client.

Country-specific Calendar Settings

You can determine country-specific settings for public holidays. Public holidays are displayed in red.

To select a country-specific calendar:

1. Select **Extras > Other Options** from the menu.
2. Select a country-specific calendar from the drop-down menu in the **Calendar** pane.

Overlapping Appointments

Select **Extras > Other Options** from the menu. Enable the **Check activities for overlaps** check box in the **Other Options** dialog box.

Note:

Only activities are checked for overlaps, not tasks or absences.

Activities without an end date/time or duration are not tested for conflicts.

Whenever new activities are added, they are checked for overlaps. If activities overlap, the **Overlapping Appointments** area is opened automatically**.** The overlapping activities are displayed as in the resource view. The conflicting activity record is highlighted with a red border.

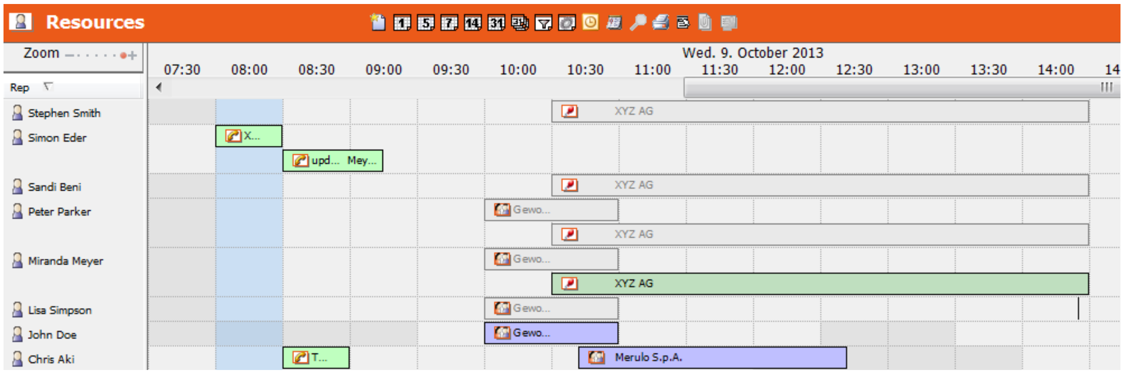
Reschedule one of the activities, see Moving Appointments. You cannot access the activity record (as in the resource view) by double-clicking on it.

Click on (**OK**) once you have made the desired changes or if you do not wish to edit the activity records.

Resources

Use the resource view to display other user's workload when adding and rescheduling appointments.

This makes planning appointments, especially internal meetings, much easier.

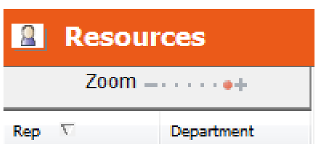


To open the resource view:

- Select **Resources** from the icon bar. The **Resources** level is opened.
- Click on (**Resources**) in the calendar. The resource view is displayed in the **Calendar** level. Select a different view to return to the calendar (e.g. the weekly view).
- Select **Appointment Planning** from an activity's context menu.

Configuring the Resource View

The following options are accessed from the top left of the screen:



- Click on the column headers to sort reps by name or department.
- Use **Zoom** to zoom the display.

To select the time period:

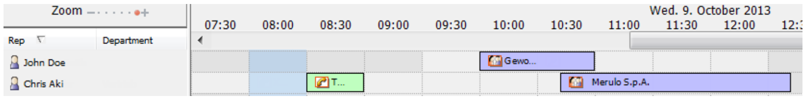
- Click on the small calendar to the bottom right.
- Press Ctrl and click on individual days to select them.

Click on (**Filter view**) to determine which reps should be displayed. Select the desired reps using the **Reps/Groups** button.

If you do not select any reps, all reps are displayed that have an appointment in the selected time period.

You can hide and show the mask and small calendar using the small arrows:

A rep's working hours are highlighted if they have been entered and the **Individual work hours** field is enabled in the rep record. Otherwise the working hours defined in the appointment settings are used, see Calendar Interface Settings and **Calendar Tab** in the *Aurea.CRM win Administrator Guide*. The color used to indicate work hours can be defined there as well-



You can define further settings, as in the calendar, see Appointment Settings and Calendar Interface Settings.

Adding, Editing and Deleting Appointments

To add an appointment in the resource view:

1. Click on an area in the view and click on (**New**). You can also double-click to add an appointment.
2. Select the type of appointment by clicking on the link.
3. Depending on the type of appointment, you can now add a record:
   - When adding an activity, the company search is opened. Search for the company and person you wish to add the appointment for, see Searching on page 43. Select the company or person and add the activity record in the **Activity** info area, see Adding Appointments. Add the desired participants and edit the time of the appointment, if necessary.
   - When adding tasks, absences and To-Do records, the corresponding info area is opened. Add the record in the info area, see Adding Appointments and Adding To-Dos.

The appointment is displayed in the resource view.

To edit or delete an appointment:

1. Double-click on the appointment to switch to it.
2. Make your changes or delete the record.

Rescheduling Appointments

To reschedule an appointment:

1. Select the appointment.

   Information on the appointment is displayed at the bottom of the mask.
2. Click on (**Filter view**) and select all the reps that are participants in the appointment.
3. You can now reschedule the appointment:
   - Drag the appointment to a new time with the mouse. You can only move appointments in the row corresponding to the activity's main participant.
   - Switch to the desired time and move the appointment by pressing Ctrl and clicking.
   - Drag the appointment from one rep's line to another rep. This is only possible for appointments with only one participant.

You can only move appointments in the row corresponding to the activity's main participant.

The appointment is rescheduled. If appointments overlap, the appointment is displayed in a new line.

Printing Appointments

To print the appointments displayed in the resource view:

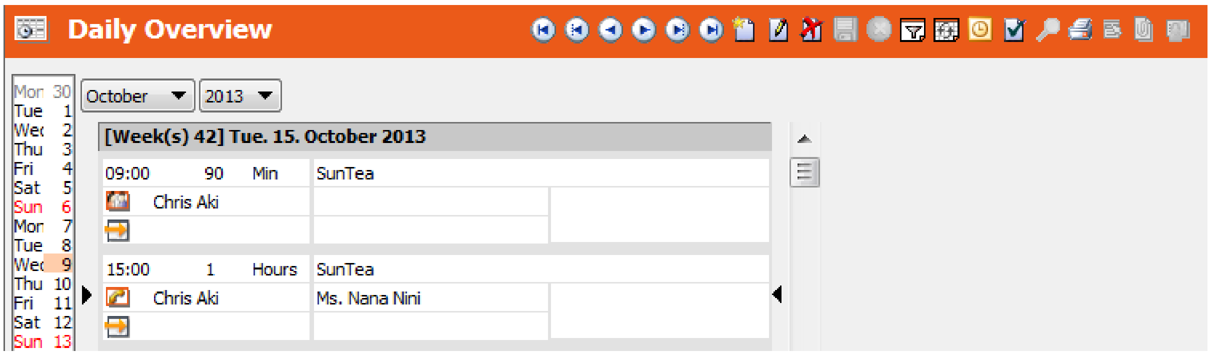
1. Select **File > Print** from the menu or click on (**Print**).
2. Select one of the following options:
   - **Print resource view**: Prints the current resource view (only the portion visible on the screen).
   - **Print activity list**: Prints a list of all activities in the current resource view.

Daily Overview

You can display and add activity records from the daily overview, but not tasks and absences.

Follow the below steps to add activity:

1. Click the **Daily Overview** icon in the icon bar, or select **Info > Daily Overview** from the menu.



2. Select the month and year using the drop-down menus.
3. Click on a day in the vertical calendar on the left to display the appointments for that day in the appointment list.

The appointment list displays the activity's most important information. The triangular cursor indicates the current appointment. You can move the cursor by using the arrows in the command bar or the up and down keys on your keyboard.

Buttons in the Daily Overview Level

The following buttons are available:

- (**New**): Search for the company or person you want to add a new appointment for. Once you have confirmed your selection, the activity mask is displayed.
- (**Edit**): Use the **Edit** button to edit the activity. You can edit the **Time**, **Duration**, **Unit**, **Rep**, **Marketing Activity** and **Text** fields.

- (**Delete**): Removes an activity record from the database (if you have the necessary rights).
- (**Filter view**): Specifies conditions to determine which activities you want to display, see Appointment Settings.
- (**Distribute**): Reschedules several appointments at once, see Distributing Appointments.
- (**Mark**): Changes the status of the currently selected activity.

You have the following options:

- (**Outlook**)or (**Lotus Notes**): One of these buttons is available if the appropriate setting has been defined in the **Configuration** info area, see Configuration Info Area (**External Calendar** category, **External Calendar** option)in the *CRM.core Administrator Guide*. Click on this button to transfer the selected activity to either Microsoft Outlook or Lotus Notes.

Appointments

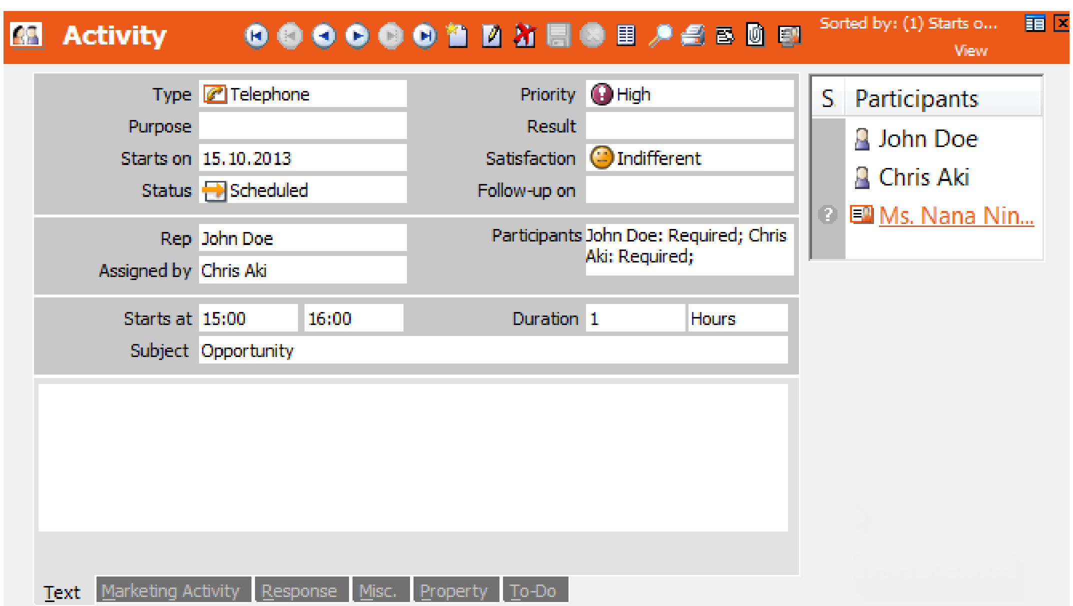
You can manage your appointments from the calendar, the resource view and the daily overview.

For further details, see Calendar on page 156, Resources on page 169, Appointments on page 173.

You can also see in the corresponding info areas in Appointment Types.

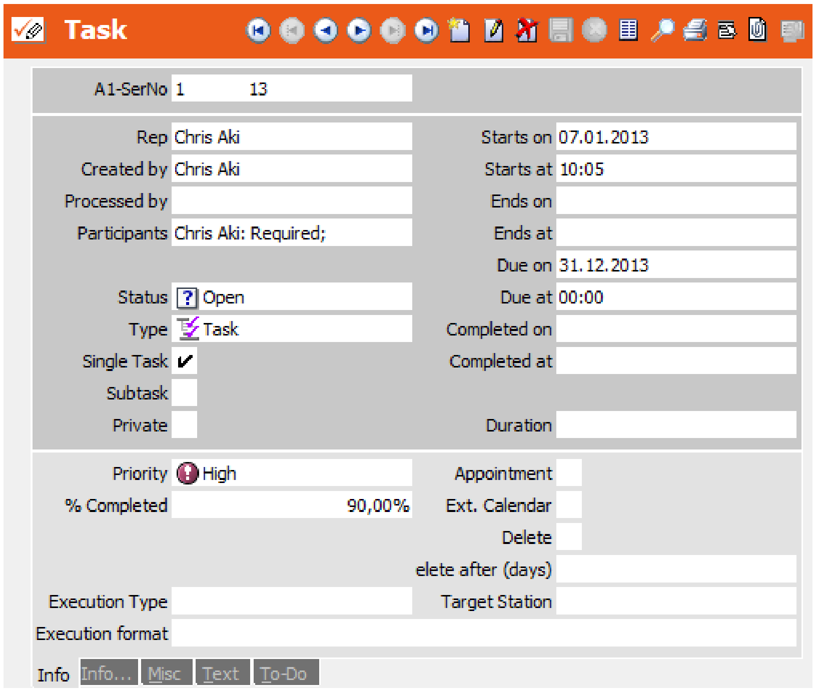
Appointment Types

The **Activity** info area provides the basis for providing personal customer support. Activity records provide valuable information about telephone calls, customer visits and similar appointments.

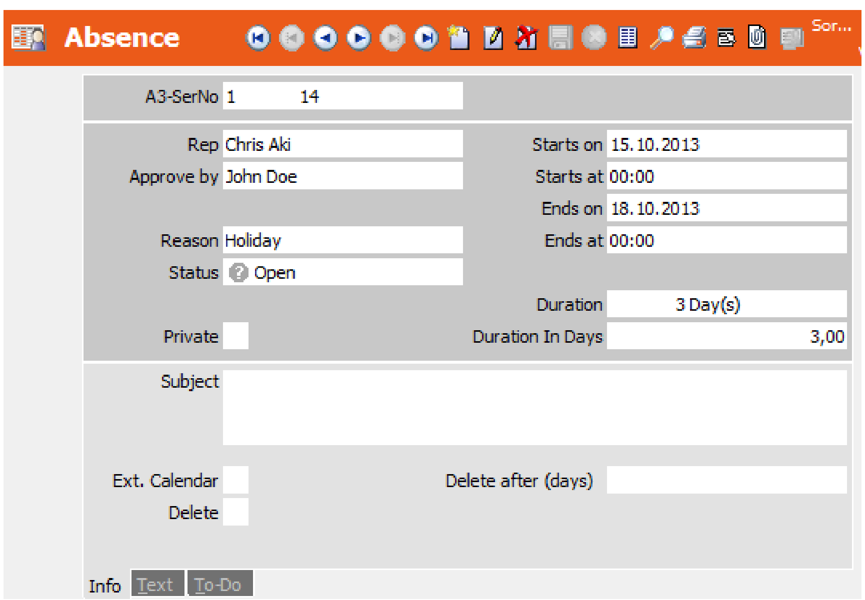


Activities are added for companies and persons. The **Activity Overview** level allows you to display your activities with all companies. Select **Info > Activity Overview** to access the **Activity Overview** level.

Use the **Task** info area to store tasks that are **not** dependent on a specific customer. Tasks are displayed in the calendar, but not in the daily overview.



Use the **Absences** info area to determine when certain employees are unavailable for business appointments (vacations, sick leave etc.).



Adding Appointments

To add an appointment:

1. To add an activity, switch to the company/person you wish to add the activity for. (This step is not necessary for tasks and absences, as these are independent records and are not added for a specific company or person.)
2. Switch to the **Activity**, **Tasks** or **Absences** info area.
3. Click on (**New**).The input mask is displayed. A number of fields may already be filled out with predefined default values.
4. If your name has not been entered in the **Rep** field, or if you wish to add an appointment for another rep, double-click on the **Rep** field or click on the rep icon () and select the desired rep from the rep list, see Rep List on page 257.

Note: If you make a change to the **Rep** field, your name is automatically entered in the **Assigned by** field.

5. Enter further details (e.g. the reason for an absence, time and/or duration of the appointment).
6. Select the participants in the **Participants** field, see Adding Reps and Resources to an Activity/Task and Adding Customers to an Activity.
7. Switch to the **To-Do** tab and enable the **Create To-Do** check box if you want the participating reps to accept or refuse the appointment or the appropriate superior to approve an absence, see To-Dos on page 185.
8. Enable the **Escal. To-Do c**heck box if message and escalation records should be added as well, see Reminders and Messages on page 189 and To-Do Escalation.
9. Enter a time period in the **Reminder duration** field, if you want to remind participants of the appointment, see Adding Reminders for all Participants.
10. Confirm with (**Save**).

Note: You can also add appointments directly in the calendar, see Creating an Appointment.

Adding Reps and Resources to an Activity/Task

You can add reps and resources to activity records; you can only add reps to tasks.

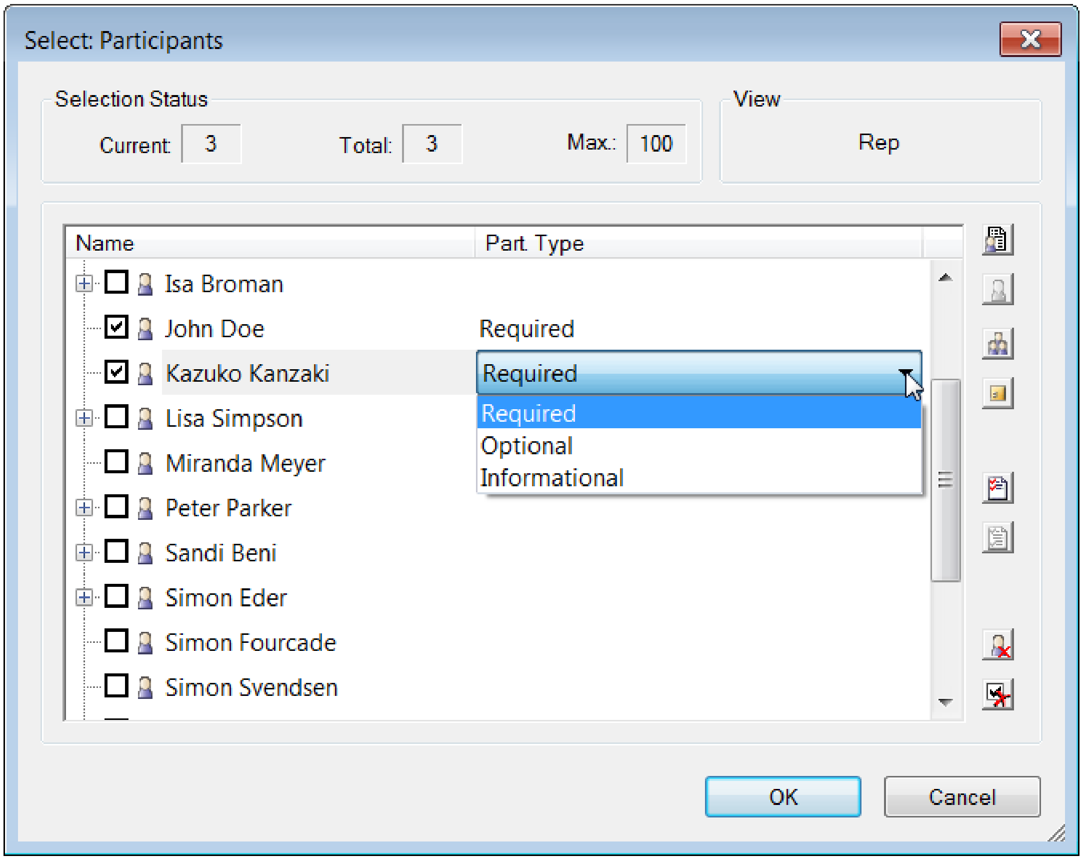
To add reps and resources:

1. Click on in the **Participants** field in an activity or task record.
2. Use the following buttons to determine what is displayed in the list:
   - (**List**): All types are listed (reps, groups and resources)
   - (**Rep**): Only reps are listed
   - (**Groups**): Only groups are listed
   - (**Resources**): Only resources are listed

3. Enable the check boxes next to the desired participants or resources in the list. Select the **Part. Type** (participation type) for each participant using the drop-down list. You can choose between **Required**, **Optional** and **Informational**. Only "Required" and "Optional" make sense as the participation type for resources.

Note: You cannot add resources to tasks.

You can select up to 100 reps.



Click on (**Delete Current Selection**) to clear the reps/groups/resources currently displayed. Click on (**Delete Entire Selection**) to clear all reps/groups/resources (even if they are not currently displayed in the list).

4. Click on **OK**.
5. Save the record.

Adding Customers to an Activity

To add further companies or persons to an activity:

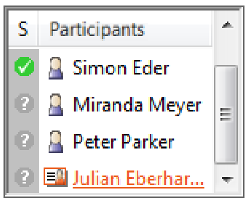
1. Select **Activity Participant** from the context menu. The **Activity Participant** level is displayed.
2. Click on **New** ().
3. Select **Company Search** or **Person Search** from the context menu.

The **Company Search** or **Person Search** is displayed, see Searching on page 43.

4. Search for and select the desired company or person. You are returned to the **Activity Participant** level.
5. Select the desired entry from the **Part. Type** field (Required, Optional, Informational).
6. Save and close the **Activity Participant** level.

You are returned to the activity you added the participating company or person to.

The list of participants to the right of the mask now includes the newly added company/person as a hyperlink.



Activity Participation Level

The **Activity Participation** level offers the same options as the **Activity** level. In addition, activities are also displayed for companies and persons that are simply entered as an activity participant (i.e. added using the **Activity Participant** entry in the context menu).

Double-click on an activity in the calendar to switch to the **Activity Participation** level.

Moving Appointments

You can reschedule appointments:

- Directly in the record by changing the date and time
- In the calendar by dragging the appointment with the mouse, see Modifying or deleting an Appointment .
- In the resource view, see Rescheduling Appointments.
- Using the **Distribute** option in the calendar (only for activities), see Distributing Appointments.

Messages are generated when an appointment is rescheduled:

- For all activity participants (message type: "Update")
- For all reps entered in a task (message type: "Information")
- The rep who needs to confirm an absence (message type: "Information")

The updated time is entered in the **Message** field.

The start and end time and dates, as well as the **To-Do Until Date**, **To-Do Until Time**, **Due on** and **Due at** fields are updated in the To-Do record and activity, task or absence. The point in time when the organizer receives a message if participants have neither confirmed nor declined to attend is also moved.

Deleting Appointments

You can delete appointments as follows:

- In the daily overview: Select the appointment and click on (**Delete**).
- In the calendar and resource view: Double-click on the appointment and click on (**Delete**).
- In the **Activity/Activity Participation/Tasks/Absences** info areas: Switch to the appointment and click on (**Delete**).

Upon deleting the appointment, the appointment and all associated To-Do, message and reminder records are deleted for all participants.

No message records are created when an appointment is deleted.

Transferring Appointments to Microsoft Outlook or Lotus Notes

Before you can transfer data to the calendar of Microsoft Outlook or Lotus Notes, you need to determine which e-mail client you are using in the **Configuration** info area, see Configuration Info Area (**External Calendar** category, **External Calendar** option)in the *CRM.core Administrator Guide*.

You can transfer an appointment (activity, task or absence) as follows:

- Select **Transfer to external calendar** from the context menu in the appointment record.
- Select **View > All Mask Fields** from the menu and enable the **Ext. Calendar** check box.

Appointments that are deleted in Aurea.CRM win are also deleted in the e-mail client.

You can also transfer all the appointments displayed at once, see Transferring Appointments to Microsoft Outlook or Lotus Notes.

Note: Fields containing **[**, **]**, _ or **#** in the field name are not recognized by Outlook. Your administrator can define a transfer format that does not use these characters. Select **Extras** > **Synchronize External Calendar** to synchronize changes made in your external calendar to appointments transferred from Aurea.CRM. The records in Aurea.CRM are updated accordingly.

Context Menu for Appointments

The following entries are available from the context menu by default (MA= activity, A1 = task, A3 = absence):

Entry	MA	A1	A3	Description
My Own		x	x	Displays all tasks where you are entered in either the **Rep** or **Participant** field. Displays all tasks where you are entered in either the **Rep** or **Participant** field.
Delegates		x	x	Displays all tasks where you are entered in the **Created by** field. Displays all absences that you have to approve; i.e. where you have been entered in the **Approved by** field.
Rep		x	x	Displays all tasks/absences for all reps.
Deputy		x	x	Additionally displays the tasks and absences for those reps that you are entered as deputy in the **Rep** info area, see Rep in the *CRM.core Administrator Guide.*
All		x	x	Displays all tasks/absences, irrespective of their status.
Active		x	x	Displays tasks with the status set to "Open" or "In Progress" where the **Due on** date is either undefined or in the future (including later the same day). Displays all absences where the start date and time lies in the future.
Completed		x	x	Displays all tasks with the status "Completed". Displays all absences with the status "Accepted".
Missed		x	x	Displays all tasks where the status is either "Open", "In Progress" or "Missed" and where the due date either lies in the past or is empty. Displays all absences with the status "Open" and a start date in the past.
Accept	x	x	x	Accepts the activity or task. This option is available for tasks created with To-Do records. Approves an absence. This option is available if you are entered in the **Approved by** field in an absence record.
Refuse	x	x	x	Refuse the activity or task. This option is available for tasks created with To-Do records. Refuses an absence. This option is available if you are entered in the **Approved by** field in an absence record.

Entry	MA	A1	A3	Description
Completed		x		For participants of a task: Sets the To-Do status of the To-Do record linked to this task to "Completed" or sends a notification to the organizer of the task. For the organizer of a task: Sets the status of the task to "Completed".
Execute		x		For tasks: Starts the predefined trigger or workflow entered in the **Execution Type** and **Execution Format** fields.
New Subtask		x		Opens the **New Subtask** level and adds a new task linked to the current task via the **A1_1_StaNo** and **A1_1_SerNo** fields. The **Predecessor Task** field contains the link to the parent task.
Connect tasks		x		Opens the **New Subtask** level and adds a new task linked to the current task via the **A1_1_StaNo** and **A1_1_SerNo** fields.
Reminder	x	x	x	Opens the **Edit Reminder** level, where you can edit existing reminders or add new reminders for yourself, see Adding and Editing Reminders for Yourself.
Document	x	x		Opens the documents entered in the document fields.
Transfer to external calendar	x	x	x	Transfers the appointment to Microsoft Outlook or Lotus Notes, see Transferring Appointments to Microsoft Outlook or Lotus Notes.
Project View		x		Opens the project view where tasks can be subdivided into multiple stages, see Structuring Tasks.
New Activity		x		Starts the company search and adds a new activity for the selected company.
Load Opportunity	x			Only available in the BTB vertical. Loads the associated opportunity, see **Opportunity Management** in the Business Logic BTB manual.
Survey	x			Opens the survey entered in the **Questionnaire** field.
Expenses	x			Opens the independent **Expenses** info area.
Load Offer	x			Only available in the BTB vertical. Loads the associated offer.

Entry	MA	A1	A3	Description
Load Property	x			Only available in the BTB vertical. Loads the associated property.
Load Installed Base	x			Only available in the BTB and OTC verticals. Loads the associated installed base.
Activity Participant	x			Opens the **Activity Participant** level.
Repetition	x			Opens the **Repetition** level, from where you can add a series of appointments, see Recurring Activities on page 182.
Appointment Planning	x			Opens the **Resources** level where you can check the availability of participants, see Resources on page 169.

Follow-up Date

If you enter a date in the **Follow-up on** field and save the record, a new activity is automatically created on this date.

Aurea.CRM win automatically switches to the new activity upon saving the record. Reps and links are transferred automatically. The serial number and station number of the predecessor activity are entered in the **MA_1_SerNo** and **MA_1_StaNo** fields.

After saving the follow-up activity, Aurea.CRM win returns to the original activity.

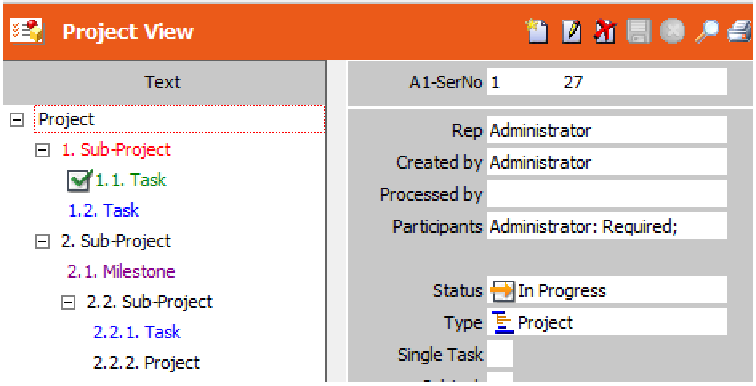
Structuring Tasks

You can structure tasks: The sub-tasks are grouped to form projects by assigning types (sub-project, milestone etc.) and linking tasks according to the project structure.

To divide a task into projects:

1. Create a new task and select "Project" in the **Type** field.
2. Save the record and select **Project View** from the context menu.

   The **Project View** is displayed.



The **Type** of task is displayed in the **Text** field.

3. Click on (**New**) to add a new sub-step to the original task, and set the **Type** to "Sub-Project".
4. Once the record is saved, the subdivision of the task is displayed in the **Text** field. Click on an entry to select and display the record in the mask.
5. You can add further sub-steps to the root task or add further sub-steps to sub-steps.

The entries under **Text** are color-coded by type and status:

- Black: project/sub-project
- Green: project/sub-project with status "Completed"
- Red: project/task with status "Missed"
- Purple: Milestone
- Blue: Task

If the status is "Completed", this is also indicated by the icon; if the status is "Missed", is displayed.

If you position the cursor over an entry, the due date and time, rep and subject are displayed (providing this data has been entered).

You can edit the order by dragging entries with the mouse.

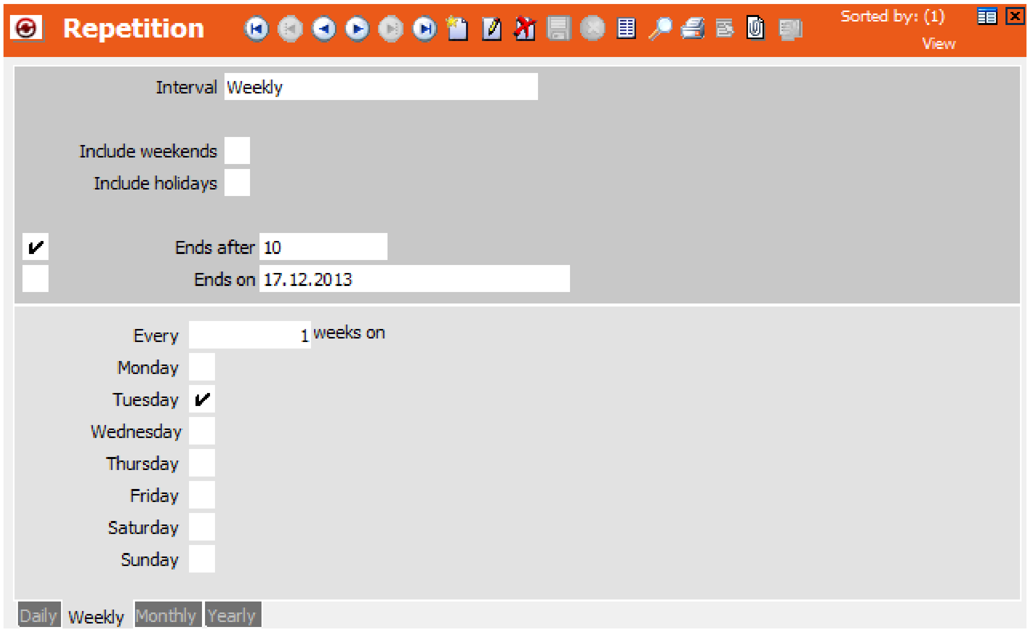
Note: The **Project View** can only be displayed as a mask. The buttons used to switch between individual records and access mask and list view are not available.

The **Project View** provides access to the same fields as in the **Tasks** info area and to some of the entries in the context menu.

Recurring Activities

You can add activities that are repeated at regular intervals.

To do so, you need to define a main activity and determine when it is to be repeated (daily, weekly, monthly, yearly).



Adding a Series of Activities

To add a series of activities:

1. Add the initial activity in the series, see Adding Appointments.
2. Select **Repetition** from the context menu. The **Repetition** info area is displayed.
3. Click on (**New**).
4. Determine the whether the **Interval** should be **Daily**, **Weekly**, **Monthly** or **Yearly**.
5. Switch to the corresponding tab.
   - **Daily:** Determine the number of days after which the appointment is repeated.
   - **Weekly:** Determine which month of the week and on which day of the week the appointment is to be repeated. You can select multiple days of the week.
   - **Monthly:** Determine the number of months after which the appointment is repeated, as well as the day of the month, or the day of the week.
   - **Yearly:** Determine the number of years after which the appointment is repeated, as well as the day of the month or day of the week.

   Use the **Do not create replacement activities** option to determine that monthly or yearly appointments should not be postponed to the next work day if they fall on a holiday or weekend.
6. If you wish to create appointments on holidays and weekends, enable the **Include weekends** or **Include holidays** check boxes.
7. Define the end of the by enabling the appropriate check box:
   - **Ends after:** The number of appointments in the series.
   - **Ends on:** The date on which the series ends.
8. Save.

The series is generated.

Note: The following fields are **not transferred** from the main activity to other activities in the series: **Updated on**, **Updated at**, **Call Result**, **No. Postponements**, **Added on StNo.**, **Starts on**, **Result**, **Created on**, **Created at**, **Ext. Calendar**, **Fixed**, **Generated**, **CmCd.**, **Costs**, **DelCd.**, **MA_1_SerNo**, **MA_1_StaNo**, **Response 1 - 5**, **Response 1 (Marketing Act.)** - **Response 5 (Marketing Act.)**, **Status**, **Create To-Do**, **To-Do Until Date**, **To-Do Until Time**, **To-Do Escal.**, **Survey Date**, **Follow-up Date**, **Satisfaction**.

Editing a Series

To edit the intervals of the whole series:

1. Switch to the first activity in the series.
2. Select **Repetition** from the context menu.
3. Edit the intervals.
4. Save.

To determine a new interval within a series:

1. Switch to the appointment after which you wish to change the intervals.
2. Select **Repetition** from the context menu.
3. Edit the intervals.
4. Save.
5. Click on **Create Series** in the dialog box that opens.

A new series is created starting with the current activity. All activities in the original series prior to the selected activity remain unchanged.

To edit an appointment or the series starting with a specific appointment:

1. Switch to the desired appointment.
2. Edit the appointment.
3. Save.

   If you have edited one of the fields that is copied to activity records in the series, a message is displayed.

4. Select **Edit this activity** to only edit the current activity's data.

   Select **Edit series from the activity onwards** to edit the current activity and all following activities in the series.

Note: Editing a series is only possible on the station on which the series is added.

Single records are only ever affected in the **Import, Communication** and **Maintenance** modules. For example, if you import a repetition record, the series is not added automatically. If you edit an activity participant not present in a later activity in the series, the participant is **not** added to the later appointments.

Changes to the station number and serial number of an activity participant are not transferred to the series.

Ending or Deleting a Series

To end a series:

1. Switch to the first activity you wish to delete.
2. Click on (**Delete**).
3. Select **Delete entire from this activity onwards**.

To delete the entire series:

1. Switch to an activity in the series.
2. Click on (**Delete**).
3. Click on **Delete entire series**.

To delete a series and retain only the main activity record:

1. Switch to the main activity.
2. Select **Repetition** from the context menu.
3. Click on (**Delete**) to delete the repetition.

To-Dos

The **To-Dos** info area stores data on which appointments are due or need to be accepted or approved.

Attendees can accept or refuse using the context menus in the **To-Do**, **Activity**, **Tasks** or **Absences** info areas, as well as in the calendar.

The entry in the **Type** field in the to-do depends on the type of appointment:

- "Appointment Planning" for activities
- "Permission" for absences
- "Completion" for tasks
- "Edit Marketing Activity Target Group" or "Execute Marketing Activity" for marketing activities
- "Calculate" for to-dos for CRM.server, CRM.server in the *CRM.core Administrator Guide*.

Adding To-Dos

To-Dos are added:

- for activities, tasks and absences where the **Create To-Do** check box is enabled
- for marketing activities, see To-Dos for Marketing Activities.
- by triggers and workflows, see Triggers in the *CRM.core Administrator Guide* and the *Aurea.CRM automator User Manual.*
- in the calendar, see Calendar Views.
- in the **To-Dos** info area

To-Dos are added for the following reps:

- Activities/tasks: To-Do records are only created for reps whose status is set to either "Necessary" or "Optional". A message is added for reps whose status is set to "Informational" if the **Escalate To-Do** check box is enabled, see To-Do Escalation.
- If you add resources to an activity, the user entered as deputy for the resource in the **Rep** info area receives the To-Do record, see Rep in the CRM.core Administrator Guide.
- Absences: The rep entered in the **Approve by** field receives a to-do. The **Type** field is set to "Permission", and the **Part. Type** field set to "Necessary". The **Participation Status** field is set to "Open". As opposed to activities and tasks, no To-Do record is added for the rep that added an absence.

A To-Do record is only created for the main activity record in a series of recurring appointments. Accepting or declining the appointment accepts of declines the entire series. The participation status is displayed in all appointments that are part of the series. To be able to accept or decline an invitation to a single meeting in the series, you need to add a corresponding To-Do record for that activity record.

Accepting or Refusing

Select **Accept** or **Refuse** from the context menu to accept or refuse an appointment or to approve or refuse an absence:

- from the appointment (in the **Activity**, **Tasks** or **Absences** info area or from the calendar)
- from the To-Do record (**To-Dos** info area).

The **Participation Status is** automatically updated.

The status in the participation list in the **Activity** info area is updated accordingly for the organizer (from "Open" to "Accepted" or "Denied").

Select **Completed** from the context menu in the **To-Dos** info area or in the calendar to set the **Status** of a task-related to-do to "Completed".

Once all a task's participants have set the status to "Completed", the **Status** field of the task as a whole is automatically set to "completed". If the task is a single job, only one user needs to set the status to "Completed".

Note: If the **Escalate To-Do** check box is enabled, the **Edit Message** level is automatically displayed. Once the message has been edited and sent, the organizer receives a message, see Adding and Editing Messages.

Context Menu for To-Dos

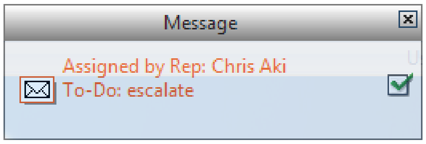
The following options are available from the context menu in the **To-Dos** info area:

My Own	Displays all your current to-dos.
Delegates	Displays all to-dos that you have delegated (i.e. where you are entered in the **Assigned by** field).

Rep	Displays the to-dos for all reps. This entry is only available to the administrator.
Deputy	Additionally displays the to-dos for those reps where you are entered as deputy in the Rep info area, >> **Rep** in the CRM.core Administrator Guide.
All	Displays all to-dos.
Active	Displays all to-dos with the status "Open".
Completed	Displays all to-dos with the status "Completed".
Missed	Displays all to-dos with the status "Missed".
Accept	Accepts an activity or task or approves an absence.
Refuse	Refuses an activity, task or absence.
Completed	Sets the status of the to-do to "Completed". This option is only available for task-related to-dos if you are entered as the rep.
Execute	Starts the predefined trigger or workflow entered in the **Execution Type** and **Execution format** fields.
Load	Opens the associated activity, task or absence.

To-Do Escalation

If the **Escalate To-Do** check box is enabled in addition to the **Create To-Do** check box, the organizer of an activity or task receives a message if any "Required" participants have not accepted or refused the appointment by the start of the activity or task (date and time in the **To-Do Until Date** and **To-Do Until Time** fields).

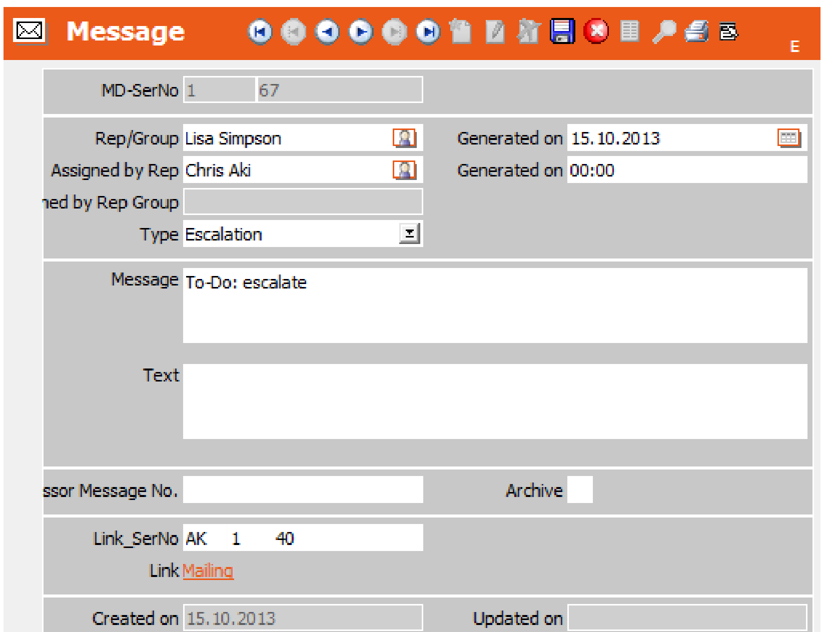


Note: If the task is a single job, only one of the participants needs to accept in order to prevent an escalation message from being generated.

The rep that added an absence record receives a message if his superior (i.e. the user entered in the **Approve by** field) has not approved the absence by the start of the absence (date and time in the **To-Do Until Date** and **To-Do Until Time** fields).

Escalation messages can also be generated for marketing activities, see To-Dos for Marketing Activities.

The entry in the **Type** field is set to "Escalation" for escalation messages. This allows the user that created an activity, task or absence record to take appropriate action; e.g. contact the participants by other means.



In addition to the escalation message, an escalation record is created in the **To-Do** info area. The **Escalate** check box is enabled in the escalation record.

To-Dos for Marketing Activities

To-Dos also play a role in campaigns and marketing activities, see Marketing Activities on page 194. To-Do records are created during the following phases of a marketing activity:

- The **Rep** entered in the **Execution (Marketing Activity)** info area receives a to-do of the type "Execute Marketing Activity", see Execution (Marketing Activity) on page 200.

The **Start on** and **Start at** entered in the **Execution (Marketing Activity)** info area are entered in the **Due on** and **Due at** fields.

Once the rep has generated a target group (by selecting **Generate** from the **Marketing Activity** context menu), the **Due on** is automatically set to the date entered in the **Edit target group until** field. The rep has completed the first step; i.e. generated a target group. The date entered in the **Due on** field now indicates by when the rep needs to complete the marketing activity, e.g. send out a mailing, see Executing Marketing Activities on page 212.

- The rep entered in the **Rep (Marketing Activity)** info area and responsible for editing the generated target group (the **Target Group** check box is enabled) receives a to-do of the type "Edit Marketing Activity Target Group", see Rep (Marketing Activity) on page 198 and Editing Target Groups on page 204.

The **Due on** field contains the date stored in the **Edit target group until** field.

- A rep (see below) is informed by means of a to-do with the type set to "Escalation", if the **Rep** entered in the **Execution (Marketing Activity)** info area has not generated a target group by the **Due on** and **Due at** entered in the to-do, see Execution (Marketing Activity) on page 200 and Executing Marketing Activities on page 212.The escalation message is added for the following reps:
  - The rep entered in the Escal. to field.
  - If the Escal. to field is empty, the Rep entered in the Marketing Activity info area.

No message is generated if the same rep is entered in these fields as in the **Rep** field in the **Execution (Marketing Activity)** record.

Reminders and Messages

You can add reminders for activities, tasks and absences for all participants or just for yourself. Only one reminder can be added per record.

Use the **Messages** info area to generate messages when reps accept or refuse an appointment. Messages are sent to the organizer of activities or tasks and the rep that added an absence. Participants can edit the messages sent to the organizer in the **Edit Message** info area, and add their own text. To create messages, the **Escalate To-Do** as well as the **Create To-Do** check boxes need to be enabled for the activity, task or absence.

Note: If the organizer edits an activity or task record, all participants are sent a message, regardless of whether the **Escalate To-Do** check box is enabled.

Messages are also created during certain phases of a campaign, see Messages for Marketing Activities.

Adding Reminders for all Participants

To add a reminder for all participants:

1. Add an activity, task or absence record. Enter the **Participants**, or in the case of an absence the superior in the **Approve by** field.
2. Enter the reminder time in the **Reminder duration** field.

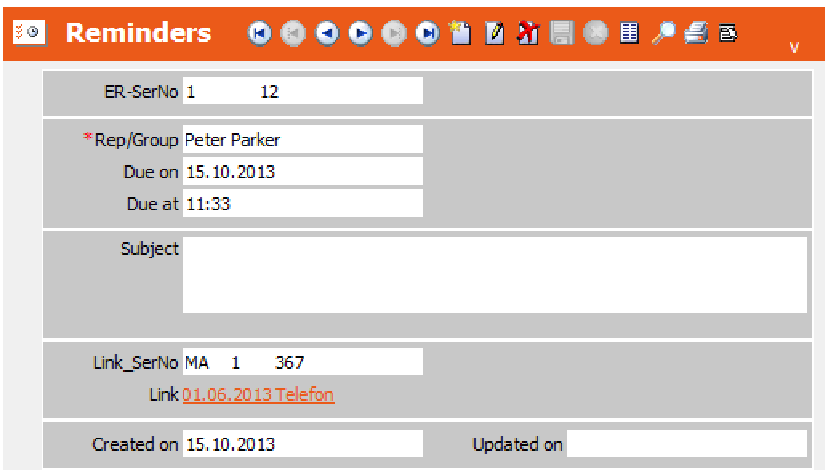
If you enter "5 Min", the reminder is displayed 5 minutes before the start of the appointment/absence, or 5 minutes before the task is due for completion.

1. Save the record.
2. At the time specified, all participants' **Reminders** buttons ( ) flash in the general toolbar. Reminders are generated based on client's system time.

Note: Select **Extras > Other Options** from the menu and enable the **Enable due reminders popup** option to display the **Reminders** button in the general toolbar. (The **Reminders** button does not flash to indicate a new reminder if you are already in the **Reminders** info area.)

---

3. Click on the **Reminders** button to switch to the **Reminders** info area.



4. The **Rep/Group** field displays the selected participant.

   The **Due on** field contains the reminder's due date; the **Due at** field the due time. These fields are calculated automatically but can be edited.
5. Select **Completed** from the context menu to delete the reminder. Otherwise the reminder is displayed the next time Aurea.CRM win is started.

Adding and Editing Reminders for Yourself

You can manually add reminders for yourself:

- Click (**New**) to add a new independent reminder.
- Select **Reminder** from the context menu in the **Activity**, **Tasks** or **Absences** info area. The **Edit Reminder** level is opened.
  - If a reminder already exists, it is displayed.
  - If no reminder exists for the record, the mask is empty. Click on **New**. The values entered in fields in the activity, task or absence are transferred automatically.

Adding and Editing Messages

To send a message to another rep, switch to the **Messages** info area, add a message and save it.

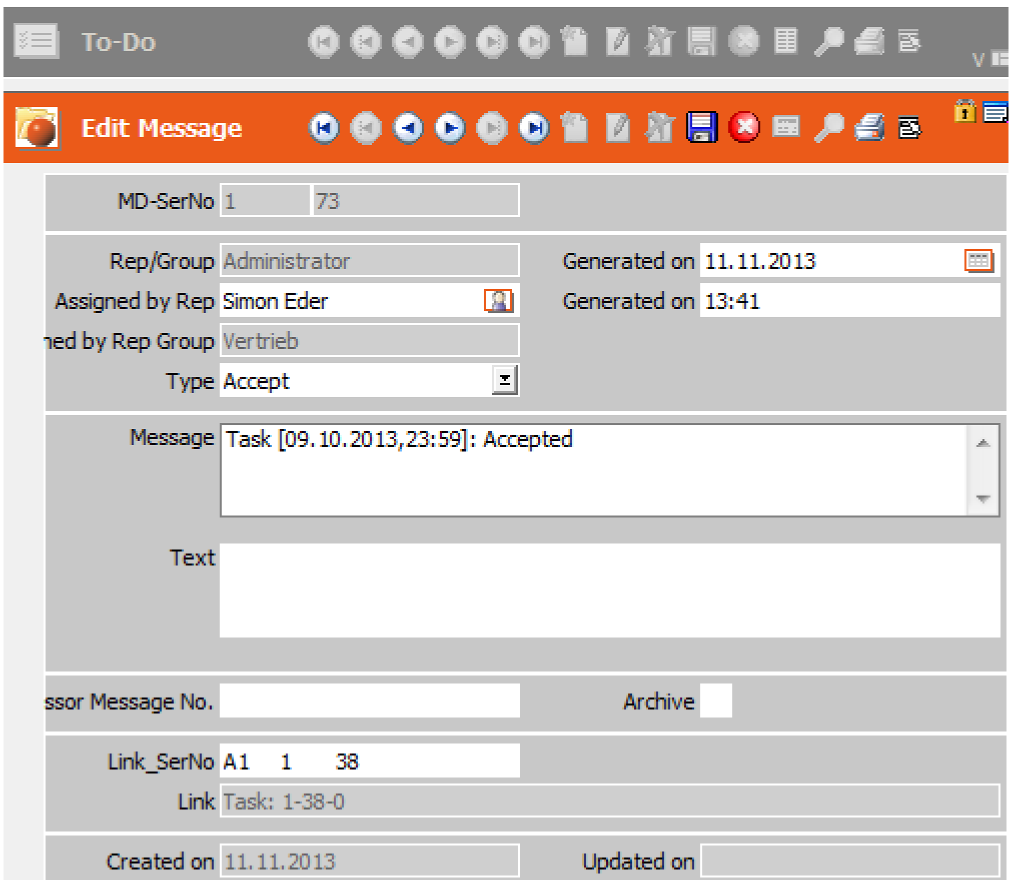
Messages can also be added for appointments:

1. A rep adds an activity, task or absence and enters you as the rep. The rep enables the **Create To-Do** and **Escalate To-Do** check boxes on the **To-Do** tab.

   Note: The appointment must be scheduled in the future to save these settings.

2. You receive a to-do. Select either **Accept** or **Refuse** from the context menu of the to-do (or the activity record or calendar entry).

   The **Edit Message** info area is displayed.

   The **Type** field is set to either "Accept" or "Refuse" depending on your selection from the context menu.

3. Enter the message in the **Text** field.
4. Save.
5. The **Messages** button () flashes in the other rep's general toolbar. The rep is informed of the acceptance or refusal of the appointment.

Note: Select **Extras > Other Options** from the menu and enable the **Enable due messages popup** option to display the **Messages** button in the general toolbar. (The **Messages** button does not flash if the **Messages** info area is already opened.)In addition, a message is also generated when the **Status** of a task-related to-do is set to "Completed".

Sending Aurea.CRM win to the Foreground upon receiving Reminders or Messages

To determine that Aurea.CRM win is sent to the foreground when a reminder or message is received:

1. Select **Extras > Other Options** from the menu.
2. Enable the **Enable due messages popup** or **Enable due reminders popup** check boxes.This causes the **Reminders** of **Messages** buttons to be displayed in the general toolbar.
3. Disable the **Popup for reminders/messages** check box.
4. Confirm with **OK**.

Aurea.CRM win now behaves as follows when a reminder is received:

- **If Aurea.CRM win is minimized:**

  The application window is opened and moved to the foreground.

- **If Aurea.CRM win is in the background:**
  - The Aurea.CRM icon in the task bar flashes.

Displaying Reminders and Messages as Popups

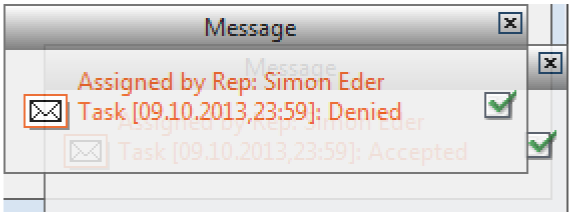
To determine that a popup is displayed when reminders and messages are received:

1. Select **Extras > Other Options** from the menu.
2. Enable the **Popup for reminders/Messages** check box.
3. Enable **Hide popup automatically** and enter a time period to automatically hide popups after the specified amount of time.

   Note: You can also click on  to close reminders and messages.

4. Enable **Open link when clicked** to automatically switch to the corresponding record by clicking on the reminder (instead of opening the reminder itself).
5. Confirm with **OK**.

When reminders or messages are received, a small popup window is displayed at the bottom right of the screen. The popup displays information on the activity, task or absence.



If several popup windows are opened at once, they are displaced slightly. Up to six popups can be displayed at one time.

Context Menu for Reminders/Messages

The following options are available from the context menu for reminders and messages (ER = reminder; MD = message):

Entry	ER	MD	Description
My Own	x	x	Restricts the display to your own messages or reminders; i.e. those where you have been entered in the **Rep/Group** field.
Delegates		x	Displays all messages where you are entered in the **Assigned by** field.
Rep	x	x	Displays the reminders/messages for all reps. This entry is only available to the administrator.
Deputy	x	x	Displays those tasks and absences for reps where you are entered as deputy in the **Rep** info area, in addition to your own, see Rep in the *CRM.core Administrator Guide.*
Active	x		Default setting. Displays all due reminders.
Completed	x	x	The status of the selected reminder/message is set to "Completed" and the reminder/message is no longer displayed.
Last change		x	Displays those messages received since the last time you opened the **Message** info area. This is the default setting when Aurea.CRM win is started.
In the Background	x	x	Minimizes the **Reminders** or **Messages** info area. The **Reminders** or **Messages** buttons in the general toolbar continue to be displayed.
Load	x	x	Opens the associated activity, task or absence.

Note: The **In the Background** and **Load** options are unavailable in the context menu in the **Edit Reminder** level.

Messages for Marketing Activities

Messages are created during the following phases of a marketing activity:

- The rep responsible for a marketing activity (entered in the **Rep** field in the **Marketing Activity** info area) receives a message with the **Type** set to "Execute Marketing Activity", once the rep responsible for executing the marketing activity (entered in the **Rep** field in the **Execution (Marketing Activity)** info area) has generated the marketing activity by selecting **Generate** from the context menu, see Execution (Marketing Activity) on page 200 and Executing Marketing Activities on page 212.
- The rep responsible for the marketing activity (**Rep** field in the **Marketing Activity** info area) receives a message with the **Type** set to "Completion", once either the rep responsible for the execution of the marketing activity or for editing the target group sets the status of their To-Do records to "Completed".

Marketing Activities

You use marketing activities for specific target groups.

You can:

- Define customer-specific marketing activities (e.g. telephone surveys or mailings).
- Determine the responsible rep (e.g. telemarketing, account manager).
- Define possible reactions and criteria for success.
- Edit the generated target group.
- Generate and edit activity, work order or mailing records.
- Generate mass mailings and faxes.
- Send SMS and e-mails.
- Trigger follow-up marketing activities automatically based on responses.
- Start marketing activities automatically.
- Monitor the results.

Marketing activities are executed in the following steps:

1. Preparation, see Planning and Preparing Marketing Activities on page 195.
2. Defining the marketing activity and any additional information, see Defining Marketing Activities on page 197.
3. Generating and editing the data, see Executing Marketing Activities on page 212.
4. Monitoring the results, see Statistics and Logs on page 215. Related marketing activities can be grouped together to form campaigns, see Campaigns on page 217.

Planning and Preparing Marketing Activities

Before executing the marketing activity, you need to specify the details of the marketing activity and create any necessary documents and records

Follow the below steps to plan and prepare your marketing activities:

1. Determine how you wish to contact your customers or prospects. You can contact customers via:
   - Mailings: Letters, e-mails, faxes or SMS can be created automatically within the scope of the marketing activity.
   - Telephone calls: Activity records are automatically generated and can be edited by telemarketing staff.
   - Combined channels: The customer/prospect is contacted using their preferred channel.
   - Adverts: An advert that is published with a keyword. Companies or persons that respond to the advert can be assigned to the marketing activity via this keyword.
   - Surveys: A questionnaire is sent by e-mail and the answers are automatically saved in Aurea.CRM. The survey is filled out by the appropriate rep if the survey is carried out by telephone.
2. Create the target group using a selection, see Defining a Selection on page 94.
   - Enable the **Exclude from Marketing Activities** field in company and person records that should never be included in marketing activities.

     This allows you to store data relating to friends or competitors in the database, without running the risk of sending them expensive marketing material or distorting analyses.

     Note: Enabling the **Exclude from Marketing Activities** field for a company also automatically excludes **all persons** in this company from marketing activities.

     If **all** persons in a company are excluded from marketing activities and the appointments are generated (e.g. for activities or mailings), the appointments generated are company-related.

     Records in the **Person** (PE) info area are not excluded from marketing activities if linked to a record in the **Contact Person** (CP) info area that is excluded from marketing activities.
   - You do not need to define a target group for follow-up marketing activities and published adverts: these target groups are built up later from those customers/prospects that responded to the previous marketing activity in a specific manner.

3. Ensure that labels have been assigned to the recipients (**Label** field in the **Person**, **Contact Person** or **Person in Company** info area) or define a general label format (**Extras > Define Label**).
4. Define a transfer field format, if necessary (**Extras > Define Transfer Fields**), that includes the fields you wish to include in the body text (e.g. order number), see Defining Transfer Fields on page 271.
5. For mass mailings and faxes:
   a. Select **Extras > Document Directories** from the menu. Select the version of your word processor. You can also specify default directories for your documents, see Document Directories on page 247.
   b. Create the main document containing the static portion of the text in Microsoft Word.
   c. Define a transfer format, see Defining Transfer Formats.
   d. Enter the mail merge fields in the main document, see Establishing a Connection with the Word Processor.

Note: You can later define whether CRM.server should generate a letter ready for printing or just a control file (containing the field contents for subsequent editing in your word processor or fax software).It is not possible to send faxes directly from within Aurea.CRM. You need to send faxes using external software. Depending on your software, create either a control file or a mail-merge document.

---

6. For e-mails:
   a. Configure the e-mail client, see E-mail Clients on page 335.
   b. Create a file containing the e-mail's body text, see **Contents of a Mass Mailing** in the Business Logic Manual.
   c. Verify that e-mail addresses have been entered for the companies/persons in the target group.
7. For SMS:
   - Define your SMS settings, see mmsms.ini File in the *Business Logic Manual*.
   - Create a file containing the message text, see Contents of an SMS message in the *Business Logic manual.*

You can define the SMS settings in the **Configuration** info area (MC) (**General settings** category, **SMS settings** option), see Configuration Info Area in the *CRM.core Administrator Guide.*

8. For surveys (via telephone or e-mail):
   - Add a questionnaire, see Defining a Questionnaire on page 113.
   - For e-mail surveys: Generate an HTML page based on the questionnaire, see Surveys in Mass E-mails in the *Business Logic Manual*.

Defining Marketing Activities

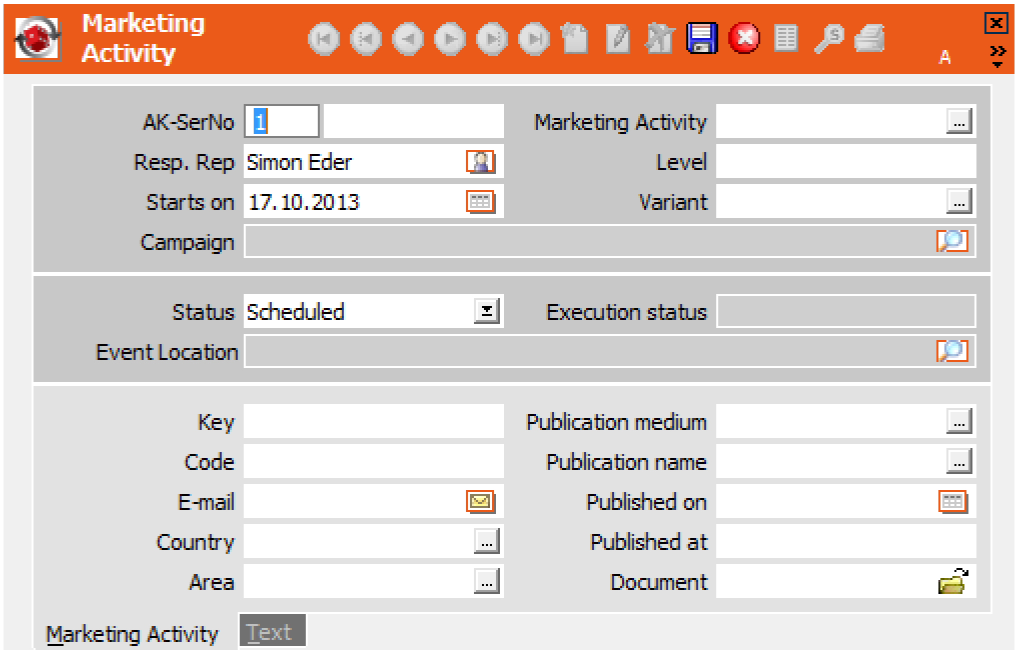
Learn how to define marketing activities.

To define a marketing activity:

1. Select **Info** > **Marketing Activity** from the menu or click on **Marketing Activity** on the icon bar.

Note: Select **Marketing Activity** from the context menu in the **Campaign** info area to switch to the **Marketing Activity** info area, see Campaigns on page 217. The campaign is displayed in the summary index card.

2. Click (**New**).

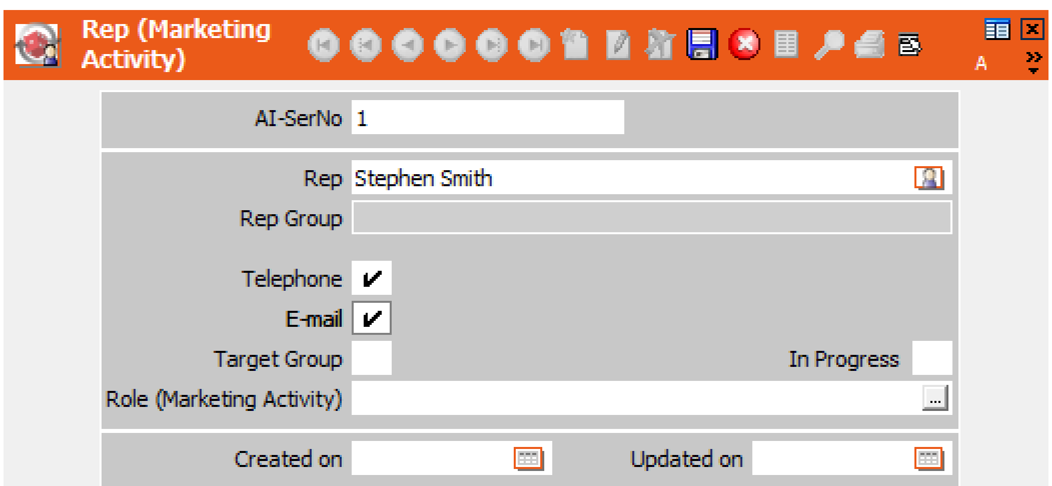


3. You are automatically entered as the rep responsible for the marketing activity in the **Resp. Rep** field. The current date is entered in the **Starts on** field. You can edit both of these fields.

4. Enter a name for the marketing activity in the **Marketing Activity** field or select one from the catalog.
5. You can enter further information on the marketing activity, such as the **Variant** and **Level**. If your marketing activity involves an advert in a published medium, enter the **Key**, **Publication medium** and **Publication name** as well.
6. Save the marketing activity.
7. Use the context menu to define further details:
   - **Rep (Marketing Activity):** Define the rep responsible for processing this marketing activity, see Rep (Marketing Activity) on page 198.
   - **Response (Marketing Activity):** Define the possible responses to the marketing activity, see Response (Marketing Activity) on page 199.
   - **Execution (Marketing Activity):** Defines how the marketing activity is executed. This includes details on mass mailings, appointments etc., see Execution (Marketing Activity) on page 200.
   - **Generate:** Opens a window used to define the marketing activity format, including details on the communication channels and records to be generated, see Defining the Marketing Activity Format on page 207.

Rep (Marketing Activity)

Use the **Rep (Marketing Activity)** info area to store reps involved with a marketing activity in addition to the rep responsible for the marketing activity (entered in the **Resp. Rep** field in the **Marketing Activity** info area).



You can select a rep and define the processes for which the rep is responsible.

1. Click on (**New**).
2. Enter the desired rep in the **Rep** field.

Note: You can also enter a group in the **Rep** field. This allocates all the reps in the group to the marketing activity. If the rep has been allocated a deputy, the deputy is also allowed to edit the marketing activity.

3. Determine the rep's task(s):
    - **Telephone:** The rep is responsible for making or answering phone calls within the scope of the marketing activity.
    - **E-mail:** The rep is responsible for processing incoming e-mail within the scope of the marketing activity.
    - **Target group:** The rep is responsible for verifying and editing a portion of the target group. The rep receives a To-Do record once the target group has been generated, see Editing Target Groups on page 204. The **Telephone** and **E-mail** fields have no function in the default configuration.
4. Save.

Response (Marketing Activity)

Use the **Response (Marketing Activity)** info area to store the possible responses to a marketing activity.

Responses are stored to:

- Define follow-up marketing activities. For example, you could assign respondents that react positively to an approach via telephone to a suitable follow-up marketing activity in which information is sent to the respondent.
- Review responses and count the number of responses of each type in order to determine the success of the marketing activity.

To define a response and its associated follow-up marketing activity:

1. Define two marketing activities. The second marketing activity should be dependent on a specific response being given to the first marketing activity.
2. Select **Response (Marketing Activity)** from the context menu in the first marketing activity. The **Response (Marketing Activity)** info area is displayed.
3. Click on (**New**).
4. Enter the response leading to the follow-up marketing activity in the **Response** field. (e.g. "Yes, send me more information").

Note: Responses added for one marketing activity are not available in other marketing activities. If you leave this field empty, you can define follow-up marketing activities for persons that did not respond to the marketing activity.

5. Click on (**Search**) in the **Follow-up Marketing Activity** field and select the second marketing activity, see Executing the Search. This causes the target group used by the second marketing activity to be automatically generated from those companies/persons that answered "Yes, send me more information" in response to the first marketing activity.
6. You can assign points used to measure the success of the marketing activity. Enter the number of points assigned to this response in the **Individual Points** field. Enter the target number of responses in the **Number (Target)** field, see Statistics (Marketing Activity).
7. Save.

Execution (Marketing Activity)

The **Execution (Marketing Activity)** info area is used to store all the information needed to execute the marketing activity.

This includes selections/target groups, the marketing activity's schedule, data transferred to activities, mailings and work orders, file formats and other information on mailings, e-mails, SMS and faxes.

To define the execution of a marketing activity:

1. Select **Execution (Marketing Activity)** from the context menu in the **Marketing Activity** info area.

   The **Execution (Marketing Activity)** info area is displayed.

2. Click (**New**).
3. Choose the selection with the marketing activity's recipients in the **Target group definition** field.

   Note: If you want to use a selection applied to the **Person** (PE) info area, you need to define labels and additional addresses for the person (PE) records. Labels and additional addresses defined for the **Company in Person** (KP) info area are not used in this case.

   To use a query from Aurea.CRM web, select **Global query** or **Private query** from the **Base** field and select the desired query in the **Target group definition** field.

   Leave the **Target group definition** field empty for follow-up marketing activities. The target groups for follow-up marketing activities are generated automatically based on responses to previous marketing activities.

4. Select an **Execution Type**:

The following options cause the marketing activity to be executed once:

- One-off, execute selection/query: When generating the records, the selection is refreshed and the new target group is then generated based on the selection.

Note: If a user that did not create the selection wants to generate the marketing activity, the selection first needs to be executed with the **Execution Type** set to **One-off, execute selection/query**.

- One-off, do not execute selection: When generating the records, the selection is not updated. The companies already stored in the selection are used to generate the target group.
- One-off, only response processing: The target group is generated automatically based on responses to the previous marketing activity or entered manually (by adding records to the target group).

When using the following options, CRM.server executes the marketing activity at regular intervals defined in the **Repeated: Frequency** and **Repeated: Frequency (Unit)** fields (see Automatically Executing Marketing Activities on page 211 and **CRM.server** in the CRM.core Administrator Guide):

- Repeated, always execute selection/query: The selection is updated each time the marketing activity is executed. The target group consists of the companies/persons in the selection.

Note: If a target group record is marked as inactive (the **Inactive** field is enabled), the record remains inactive if the record is still in the selection after the selection has been updated.

- Repeated, execute selection once: The selection is updated when the target group is generated. The selection is not updated if the marketing activity is repeated.
- Repeated, never execute selection: The selection is not updated when generating the target group. The selection is not updated if the marketing activity is repeated.
- Repeated, only response processing: The target group is generated automatically (based on responses to a previous marketing activity) or manually (by adding records to the target group).
- Repeated, packages: The mailing is only sent out to a subset of the target group that has not yet been contacted. Enter the maximum number of mailings to send in each cycle in the Max. package size field. The marketing activity continues to be executed until all persons in the target group have been contacted. Typically used for mailings that for reasons of cost or logistics cannot be handled in one go.
- Repeated, extend selection/query: The selection or query is updated each time the marketing activity is executed. The existing target group records are retained. Only the companies/persons in the selection that are not yet included in the target group are added to the target group. The marketing activity is executed for these recently added records. Typically used for mailings to customers, e.g. contact all companies that have had their Lead Status set to "Customer" since the last time the marketing activity was executed.

---

5. Enable the **Create target group** check box if you wish to create a target group.

Note: You can execute a marketing activity for a specific group by selecting a selection or query (from Aurea.CRM web) in the **Target group definition** field in the **Execution (Marketing Activity)** info area. Additionally generating a target group (see Generating the Target Group on page 204) has the following advantages:- Target groups are not user-specific, but are available to all reps. Your administrator can nonetheless determine that you can only view or edit the portion of the target group assigned to you.- Target groups can be edited once they have been generated, see Editing Target Groups on page 204.

6. Enter the **Start on** field and the rep responsible for the execution in the **Rep** field.
7. Use the **Plan** tab to store information on the target group and general information on the generation of records.
8. Use the **Generate** tab to enter details on the activity, mailing and work order records to be generated:
   - Which fields should automatically be transferred to the generated records (e.g. the activity type)
   - Default values to be entered in the generated records
9. Use the **Send** tab to determine which information to send to the target group:
   - Mail merge document and control file for letters and faxes

   Save letters: A document link record is added for the companies/persons and activity, work order or mailing records containing the letter. The control data (transfer fields format containing all companies/persons in the target group) is stored in a read-only document record. Click on (**Document overview**) in the parent record to access these documents.

   Note: Enabling this option can reduce the performance of the system while generating the records.

   - Body text and control file used by SMS and e-mails
   - E-mail settings: Format, sender, priority, subject, attachments
   - Survey details, >> Surveys in Bulk E-mails on page 137.
10. Use the **Settings** tab to define settings relating to the automatic execution of marketing activities via CRM.server, see Automatically Executing Marketing Activities on page 211.
11. Save the record.

The rep entered in the **Rep** field receives a To-Do record of the type "Execute Marketing Activity". The **Due on** field of the To-Do record is set to the **Start on** date from the execution record. Once the status of the To-Do record is set to "Completed", the rep responsible for the marketing activity (entered in the **Resp. Rep** field in the **Marketing Activity** info area) receives a message of the type "Completion" with the text "To-Do: Completed" in the **Message** field.

Refer to the online field help for more detailed information on the fields in the **Execution (Marketing Activity)** info area.

Generating the Target Group

Learn how to generate a target group for your market activity.

To generate a target group for your marketing activity:

1. Select **Generate** from the marketing activity execution context menu. A dialog box opens.
2. Click on **Start**.
3. Confirm the messages by clicking **OK**. If you execute a step not included in the plan (e.g. the start date has not yet been reached), confirm the second message.

   The target group is generated.

   Each person/company is automatically assigned a rep in the **Target Group (Marketing Activity)** info area (**Rep** field). The rep is determined by searching through the following fields in the company and person records in order: **Person**/**Office Rep**, **Person**/**Rep**, **Company**/**Rep 1** (BTB), **Company**/**Rep** (OTC and FS). If all of these fields are empty and a value is entered in the **Business Area** (BTB, OTC), **Product Group** (BTB, OTC), **Product Type** (FS) or **Branch Office** (FS) fields in the **Execution (Marketing Activity)** info area, the corresponding rep entered in the **Sales Group** (BTB, FS)or **Account Manager** (OTC) info area is assigned.
4. Confirm the message.
5. Close the dialog box.

Editing Target Groups

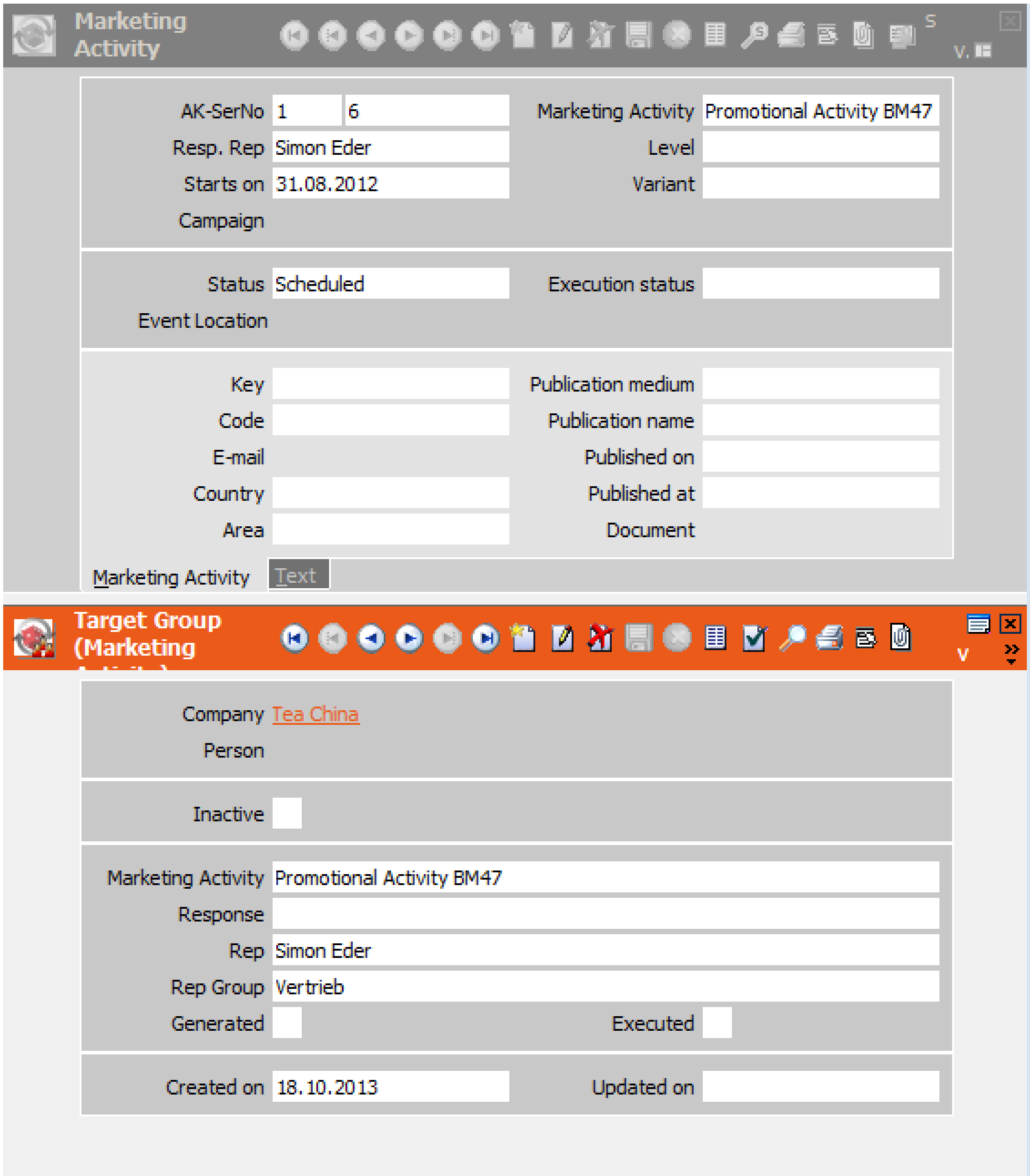
Learn how to edit target groups.

To edit a target group:

1. If you have been assigned to editing the target group (**Rep (Marketing Activity)** info area, **Target Group** check box), you receive a to-do of the type "Edit Marketing Activity Target Group" once the target group has been generated.
2. Select **Edit Target Group** from the context menu in the **Marketing Activity** info area.

All the marketing activities whose target groups you currently need to edit (i.e. the current date is within the time period specified in the **Edit target group from** and **Edit target group until** fields) are listed in the **Edit Target Group** level. The currently selected target group is displayed in the **Target Group (Marketing Activity)** info area.

Note: Your administrator can determine that only the subset of the target group that you are responsible for editing is displayed (by defining conditional access to the **Target Group (Marketing Activity)** info area where Rep ID = current rep), see Rights in the *CRM.core Administrator Guide*.



Note: Select **Target Group (Marketing Activity)** from the context menu in the **Marketing Activity** info area to open the **Target Group (Marketing Activity)** info area and display all records stored for the current marketing activity. You can view these records outside the editing time period entered in the marketing activity and without being responsible for editing the target group.

3. To edit the target group, you can:
   - Click (**New**) to add a new company or person to the target group.
   - Click (**Mark**) to toggle the **Inactive** field in the target group record. Inactive records are ignored when executing the marketing activity.
   - Click (**Delete**) to delete the current record from the target group.

   Note: Aurea recommends that you set records as inactive instead of deleting them. This ensures that another rep does not add the record again after you deleted it from the target group.Select **Delete target group** from the context menu in the **Edit Target Group** or **Marketing Activity** info area to delete the entire target group.

   ---

4. Set the status of the to-do to "Completed" once you have finished.
5. The rep responsible for the marketing activity is automatically informed by a message of the type "Completion".

   You can also use the following options to edit the target group:
   - Select **Load** from the context menu or click on a link to switch to the company/person record.
   - Select **Info > Target Group (Marketing Activity)** from the **Company + Person** level to display all target groups containing the current company/person.
   - Select **Target Group (Marketing Activity)** from the context menu in the **Marketing Activity** info area to open the target group.
   - Select **Edit Target Group** from the **Campaign** info area to edit the target group used by the marketing activities in the campaign.

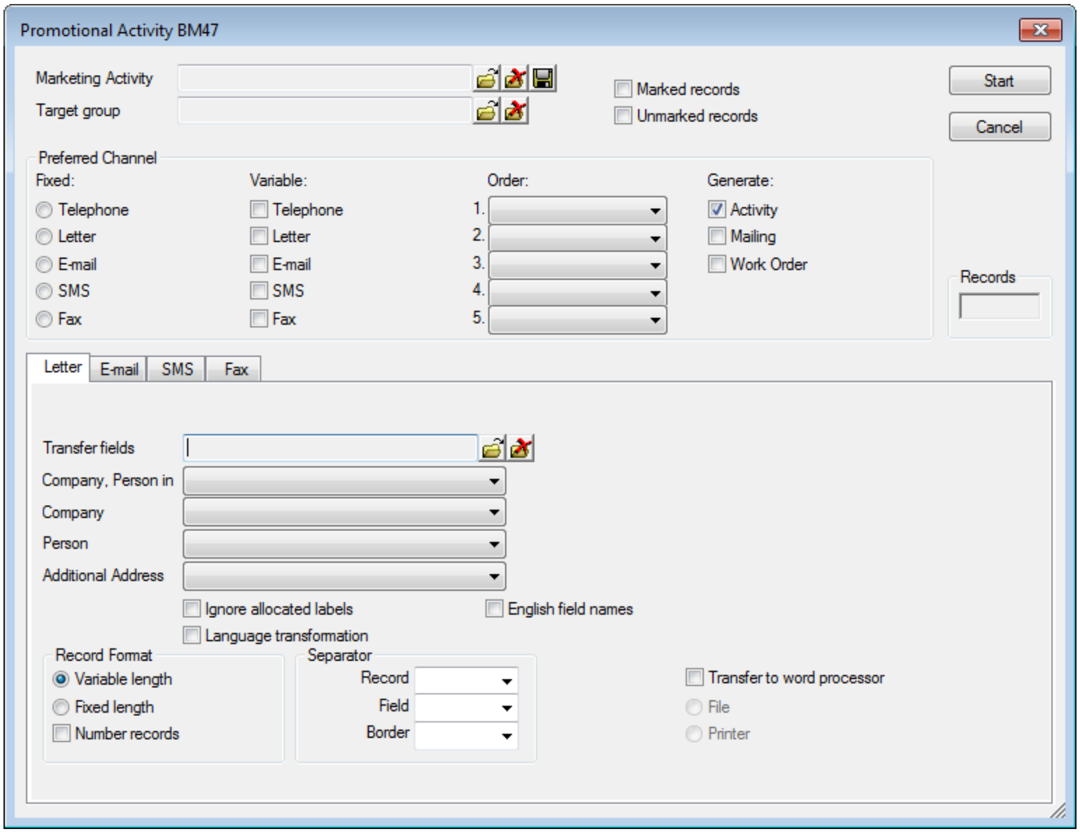
Defining the Marketing Activity Format

Learn how to define the details in marketing activity format.

You (or the executing rep) can define further details in the marketing activity format:

1. Select **Generate** from the context menu in the **Marketing Activity** or **Execution (Marketing Activity)** info areas.

   A dialog box opens.



2. The following fields are automatically transferred from the **Execution (Marketing Activity)** info area. You can edit the values here:
   - **Target group:** The selection or query used to generate the target group. The selection is not saved as part of the marketing activity format. You can consequently use the same marketing activity format with different selections.
   - **Marked/Unmarked records:** Only the marked or unmarked records in the selection are taken into account, see Editing Selection Data. If you do not select an option, all records are used.
3. Determine how to contact your target group under **Preferred Channel**:
   - Select a channel in the **Fixed** column which should always be used (**Telephone, Letter, E-mail, SMS, Fax**).
   - Select one or more channels from the **Variable** column. The channel entered as the **Preferred Channel** in the **Person** or **Person in Company** info area is used (assuming that the necessary information is also present, e.g. an e-mail address). If none of the channels selected in the **Variable** column are possible/preferred, the first possible channel entered in the **Order** column is used.
4. Enable the **Activity, Work Order** and/or **Mailing** check boxes to create records in the corresponding info areas within the scope of the marketing activity. Activities are added for telemarketing reps or account managers. Work orders contain tasks to be executed within the scope of regular customer appointments, see Work Or-

ders in the *Business Logic Manual*. Mailing records provide a log of mailings, the responses and the results of a letter or e-mail.

- If you have selected a fixed channel or not specified a channel (step 3), select the appropriate type of record to be generated (e.g. **Activity** for the **Telephone** channel).
- If you have selected variable channels, records are generated in the following order: **Mailing**, **Activity**, **Work Order** (only **Activity** and **Work Order** for telephone activities).

5. Use the tabs in the lower portion of the screen to determine further settings for all channels apart from **Telephone**:

   - **Transfer fields:** Click the **Load** button to select the predefined transfer fields format, see Planning and Preparing Marketing Activities on page 195. These fields are transferred to the mail merge document or control file when generating the marketing activity.
   - Select the default label (for printed labels and greetings in letters, faxes, SMS and e-mails) to use from the **Company, Person in Company** and **Company** drop-down lists, if labels are not specified in some company and person records (see **Label Formats**).
   - **Additional Address:** Uses the other address selected here (and defined in the **Additional Addresses** info area). If no such address is defined, the label format entered in the person record is used.

   E-mails are sent only to persons or companies with an e-mail address. By default, the e-mail fields are used in the following order:

   For **companies**:

   If an address type is selected under **Additional Address** and an additional address of this type is defined for the company in the **Additional Address** info area, the e-mail address entered there is used.

   E-mail

   E-mail 2

   For **persons (KP/CP)**:

   E-mail

   E-mail 2

   If an **Additional Address** type is selected, the first additional address found for the person.

   The e-mail address of the corresponding company (see above).

   For **private persons (PE)**:

   E-mail

Private E-mail

Home Office E-mail

If no e-mail address is found, no e-mail is sent to this company or person.

Note: Your administrator can determine that you can select a different order to check e-mail fields from the **E-mail address order** field in the **Execution (Marketing Activity)** info area, see Configuration Info Area (**Campaigns** category, **E-mail address order wildcard** option) in the *CRM.core Administrator Guide*.

- Ignore allocated labels: Label formats defined for companies and/or persons are replaced by a standard label. If no person is stored for a company, the label entered for the company is used instead.
- Language transformation: All catalog values are transferred in the language entered in the person record.
- English field names: Determines that label fields (Addr0, Addr1 etc.) are always transferred in English. Use this setting to ensure that letters, e-mails, faxes and SMS are also generated correctly when using other language versions of Aurea.CRM.

You need to make the same settings as you did when creating the transfer format used by the mail merge document, see Planning and Preparing Marketing Activities on page 195.

- Record Format: Defines the format of the control file:

- Variable length/Fixed length: Determine whether a separator is used to distinguish between individual field data or whether fields are output as a fixed length.

- Number Records: Records are numbered sequentially.

- Separator: Specify the separator between each Record and Field, and any borders (at the start and end of a field). Enter the character or select one from the drop-down list.
- Transfer to word processor: Enable this check box to transfer the mail merge document, either as a File or directly to the Printer.

6. Save your settings under **Marketing Activity Format**. The marketing activity format is automatically entered in the **Marketing Activity Format** field in the **Execution (Marketing Activity)** info area (provided the field is empty).

Note: Generate the records immediately without saving, see Executing Marketing Activities on page 212. The settings in the dialog box are used in the process but are not saved.

---

7. Click **Cancel**.

Automatically Executing Marketing Activities

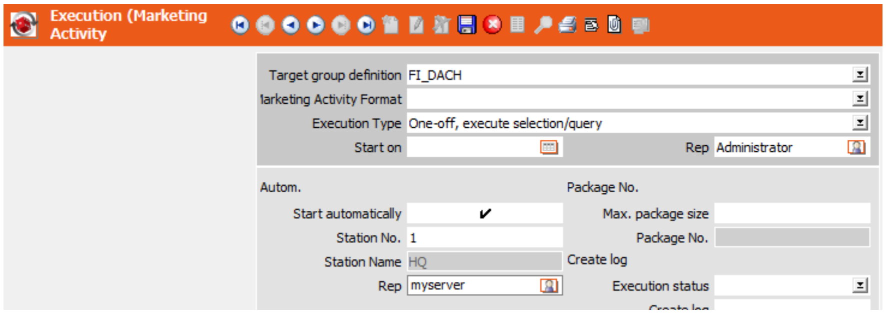
You can assign marketing activities to a "virtual" user in order to automatically execute marketing activities at the specified time using CRM.server.

For example, you could determine that the execution should take place at night to prevent overloading the server during the day.

CRM.server is configured by your administrator, see CRM.server in the *CRM.core Administrator Guide*. Ask your administrator for the name of the CRM.server user.

To define an automatic marketing activity:

1. Enable the **Start automatically** check box on the **Settings** tab in the **Execution (Marketing Activity)** info area. Enter the CRM.server user in the **Rep** field.



Note: The rights assigned to the rep (in the **Sel. User** field) that selected the selection/query are used when automatically executing the marketing activity.

2. Enter the start date and time on the **Plan** tab (**Start on** and **Start at** fields).
3. Enable the **Create target group** check box and enter the length of time during which the target group can be edited in the **Edit target group (in days)** field.
4. Enter the date on which records should be generated in the **Gen. Date (Scheduled)** and **Gen. Time (Scheduled)** fields.
5. Use the settings under **Repetition** (**Settings** tab) to define the frequency with which the marketing activity is repeated, and the day of the month on which to repeat the marketing activity in the case of monthly marketing activities. If you have defined a **Repeated: Frequency** in hours or minutes, you can restrict the time period during which the marketing activity is repeated using the **Repeated: From (Time)** and **Repeated: Until (Time)** fields. The time at which the marketing activity is next executed is calculated based on the frequency and time of the first or current execution.

The marketing activity is processed as follows:

1. The target group is generated at the specified time (**Start at**/**Start on** fields). It can be edited for the length of time specified.
2. A To-Do record is created for the CRM.server user, with its status set to "Open".

3. On the date entered in the **Gen. Date (Scheduled)** field, the CRM.server user automatically generates records (activities etc.) for the current target group.
4. The status of the to-do is set to "Completed".

Note: Your administrator can define a field (check box) that you can activate to abort the execution of a marketing activity by CRM.server, see Configuration Info area (**Campaigns** category, **Field used to cancel the execution of marketing activities** option) in the *CRM.core Administrator Guide*.

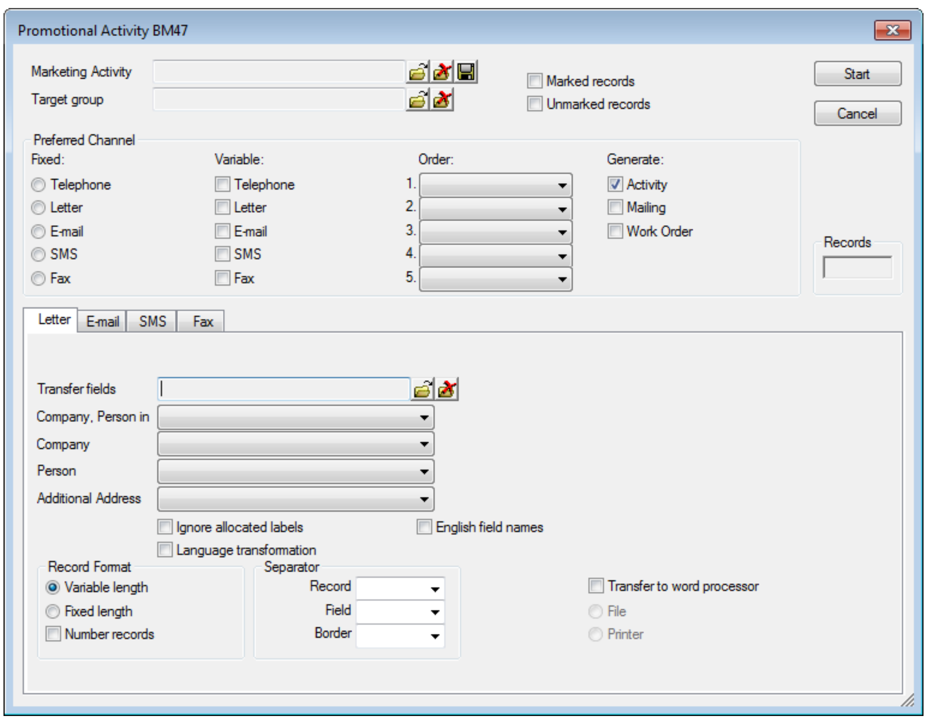
Executing Marketing Activities

After defining the marketing activity, its execution and the marketing activity format, and generating a target group, you can generate the activity, mailing and work order records and send e-mails.

Follow the below steps:

1. Select **Generate** from the context menu in the **Marketing Activity** or **Act. Execution** info areas.

   A dialog box opens.



2. If a marketing activity format has been entered in the **Execution (Marketing Activity)** info area, the marketing activity format is displayed in the **Marketing Activity Format** field. If not, click in the field to load a format.

3. Click on **Start** to:
   - Send e-mails or SMS to the target group and save the information in a mailing record.
   - Generate activity and work order records for further processing.
   - Display a mail merge document in your word processor

   Note: Click on **Cancel** to cancel generating the records. Previously generated records (the number is displayed in the **Records** field) are not deleted. To delete these records, you can:- Delete the marketing activity- Select **Edit Activity/Mailing/Work Order** from the context menu and delete the records individually.- Use a trigger defined by your administrator to delete the records. Deleting mailing records is not recommended, as the generated e-mails is already sent.

   ---

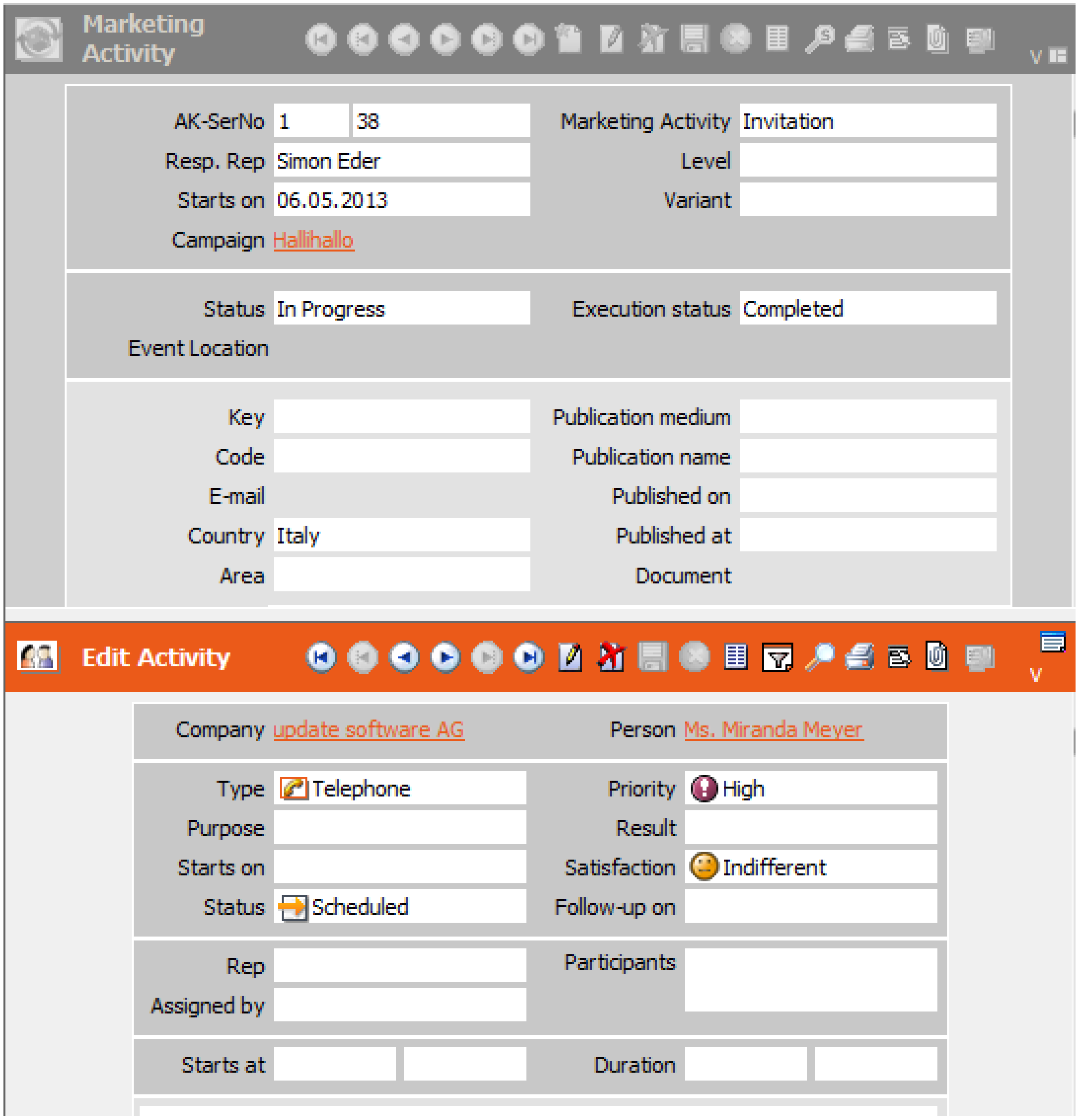
4. Confirm the "Done" message with **OK**.
5. To confirm that the generation is successful:
   - If a target group exists, the **Executed** check box is automatically enabled for each target group record that is processed successfully.
   - A record is created in the **Log (Marketing Activity)** info area each time the marketing activity is generated, see Log (Marketing Activity).
   - Your administrator can determine that error messages are written to a field in the **Target Group (Marketing Activity)** info area and that a message is added if sending an e-mail fails, see Configuration Info Area (**Campaigns** category, **Error messages in generic text field** and **Generate message on error**) in the *CRM.core Administrator Guide.*
6. You can now edit the generated records:
   - Edit the activities, work orders and mailings as necessary, see Editing Generated Records.
   - Print the letters.
   - Use the control file in your word processor or in conjunction with your fax software.
   - Add activities for marketing activities involving adverts and assign them to the marketing activity manually, see Assigning Records to a Marketing Activity Manually.

Editing Generated Records

To edit records generated for a marketing activity:

1. Select the corresponding entry from the context menu in the **Marketing Activity** info area: **Edit Activity, Edit Mailing, Edit Work Order**

   The **Activity, Mailing** or **Work Order** level is opened.



2. Edit the record as desired:

   - Enter responses from customers/prospects in the **Response 1 – 5 (Marketing Act.)** fields. If a follow-up marketing activity is defined for the response, the customer/prospect is immediately assigned to the follow-up marketing activity's target group.
   - Call the contact person. Select **Survey** from the menu and complete the survey, if applicable, see Carrying out the Survey on page 117.
   - Enter the time and/or duration of the activity.

- Change the **Status** of the activity to "Completed", enter the appropriate **Result** (e.g. "successful"), etc.
- Click (**Delete**) to delete a record.

Assigning Records to a Marketing Activity Manually

To assign a record added manually (activity, mailing, work order, event) to a marketing activity:

1. Switch to the desired record.
2. Click on (**Search**) in the **-> Marketing Activity** field.
3. Search for the desired marketing activity and select it, see Executing the Search.
4. Click on **OK** to assign the record to the marketing activity.

AK-StaNo, **AK-SerNo**, **Marketing Activity** and **Variant** are transferred from the marketing activity.

Note: You **cannot** assign a record to a marketing activity by entering values directly in the **Marketing Activity**, **Level** and **Variant** fields.

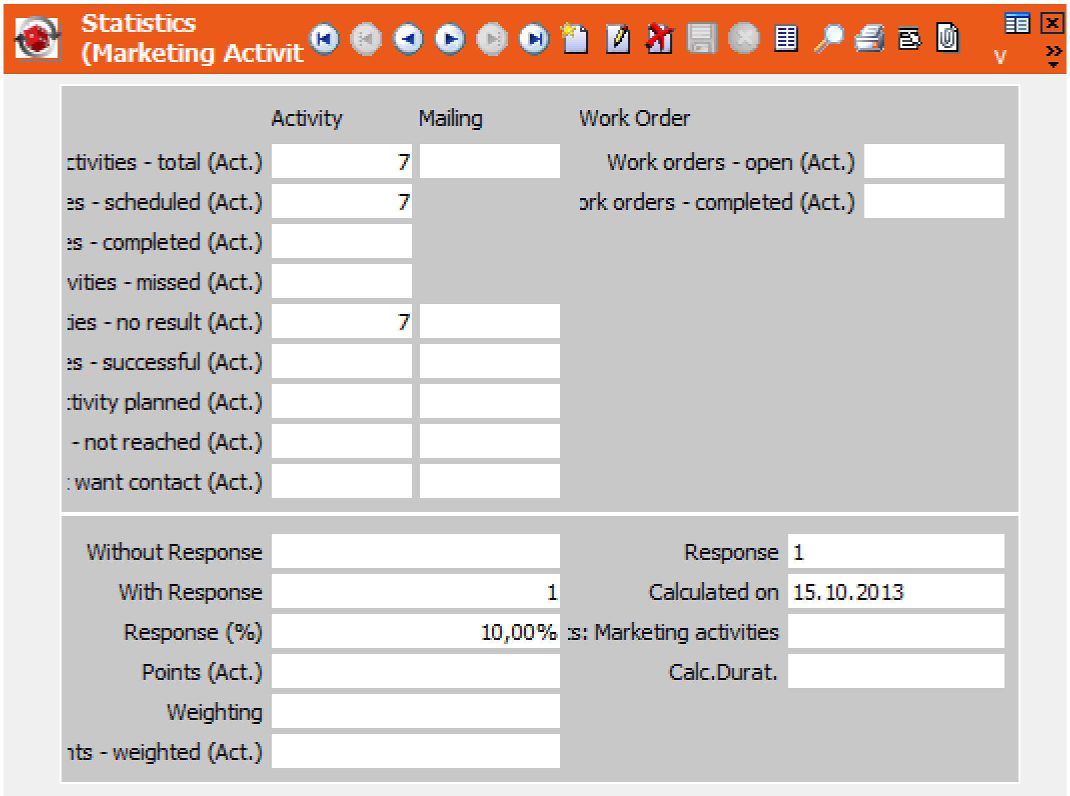
Statistics and Logs

Learn how to verify that your marketing activity is being processed correctly and monitor its success, both during and after the marketing activity.

Statistics (Marketing Activity)

To calculate statistics for your marketing activity:

1. Select **Calculate** from the context menu in the **Marketing Activity** info area.
2. Select **Statistics (Marketing Activity)** from the context menu to switch to the **Statistics (Marketing Activity)** info area.



The actual number of responses of each type is displayed in the fields ending with **(Act).** The number of points for all the responses received is totaled (**Points (Act.)**) and compared with a target value (**Points (Target)**).

Note: You can enter further target values by selecting **View > All Mask Fields** from the menu. This only needs to be done when performing the calculation the first time. The fields containing the target values are not overwritten when recalculating the statistics.

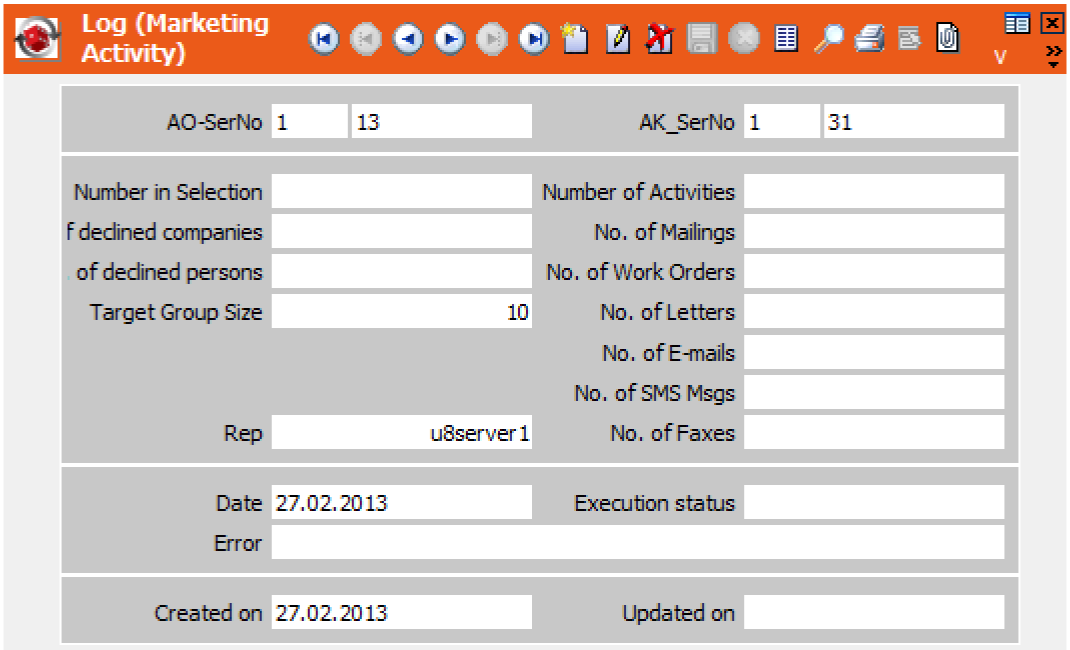
---

3. The points awarded to individual marketing activities within a campaign can be weighted for the campaign (**Weighting, Points - weighted (Act.)** and **Points - weighted (Target)** fields), see Calculating Campaign Statistics.

Note: If you edit the **Currency** entered in the **Marketing Activity** info area, you need to delete the record in the **Statistics (Marketing Activity)** info area and recalculate the statistics.

Log (Marketing Activity)

Select **Log (Marketing Activity)** from the context menu in the **Marketing Activity** info area to display the marketing activity logs. You can view information on which processes have been executed and how many records have been added.



The **Execution Status** field stores the marketing activity's current status (Open, Completed, Warning, Error). The corresponding error message is entered in the **Error** field if an error or warning occurs.

Refer to the online field help for more detailed information on the fields in the **Log (Marketing Activity)** info area.

Log File

If you enable the **Create log** check box in the **Execution (Marketing Activity)** info area, log details are written to the file `..\system\db\<user name>_<module number>` or `..\system\db\<user name>_<service name>` for marketing activities that are automatically executed by CRM.server, see Logs and Error Messages and Error Codes for Marketing Activities in the *CRM.core Administrator Guide*.

Campaigns

Learn all about campaign.

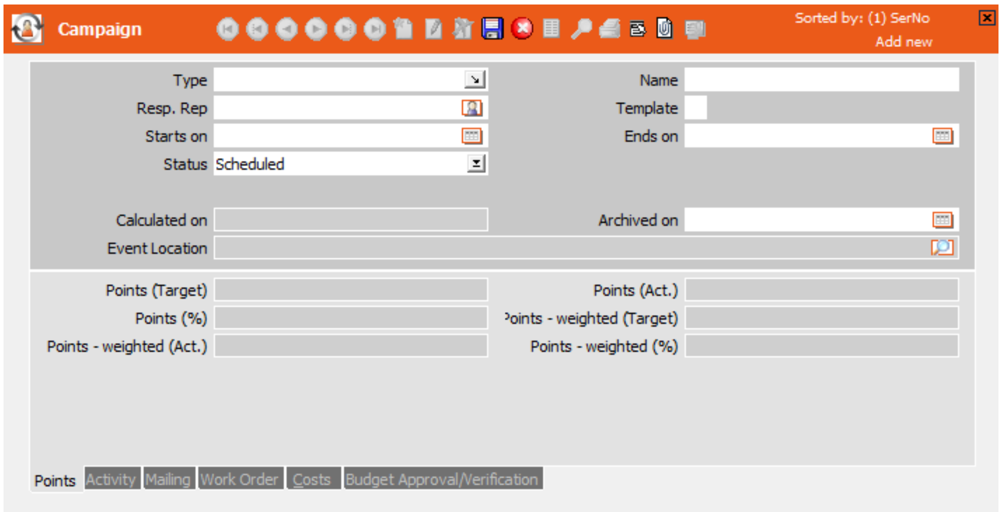
You can add or edit a campaign:

- In the **Campaign** info area, see Campaign Info Area.
- Using the campaign planning function, which simplifies the process of adding marketing activities and related records to your campaigns. You can also create new campaigns using existing campaigns as a template, see Campaign Planning.
- In graphical form in the campaign designer using marketing activity templates, see Campaign Designer.
- You can also monitor the success of the campaign, see Calculating Campaign Statistics.

Campaign Info Area

To add a campaign:

1. Select **Info** > **Campaign** from the menu.
2. Click (**New**).



3. Enter the following data:
   - **Name:** The name of the campaign.
   - **Status:** The status of the campaign (Scheduled, In Progress, Completed, Canceled, Archive, Template and Budget approval).
   - **Starts on** / **Ends on:** The start and end of the campaign.
   - **Resp. Rep:** The rep responsible for the campaign.
4. To add a new marketing activity to your campaign, save the campaign and select **Marketing Activity** from the context menu.

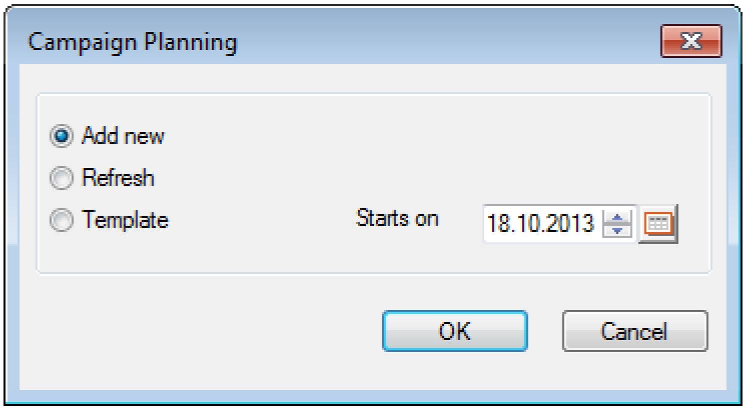
   The campaign name is automatically entered in the **Campaign** field in the marketing activity. The rep is also transferred from the campaign record to the marketing activity.
5. To assign an existing marketing activity to a campaign, click on (**Search**) next to the **Campaign** field in the **Marketing Activity** info area and search for the desired campaign. The campaign-specific fields in the marketing activity are automatically updated. Note that the **CM_StaNo** and **CM_SerNo** fields in activity and mailing records are not updated for performance reasons.
6. Save the record.

Campaign Planning

Use the campaign planning feature to add or edit a campaign (possibly using a campaign template).

To add a new campaign using the campaign planning feature:

1. Select **Info > Campaign** from the menu.
2. Switch to the desired campaign record if you wish to edit or use an existing campaign as a template.
3. Select **Campaign Planning** from the context menu.



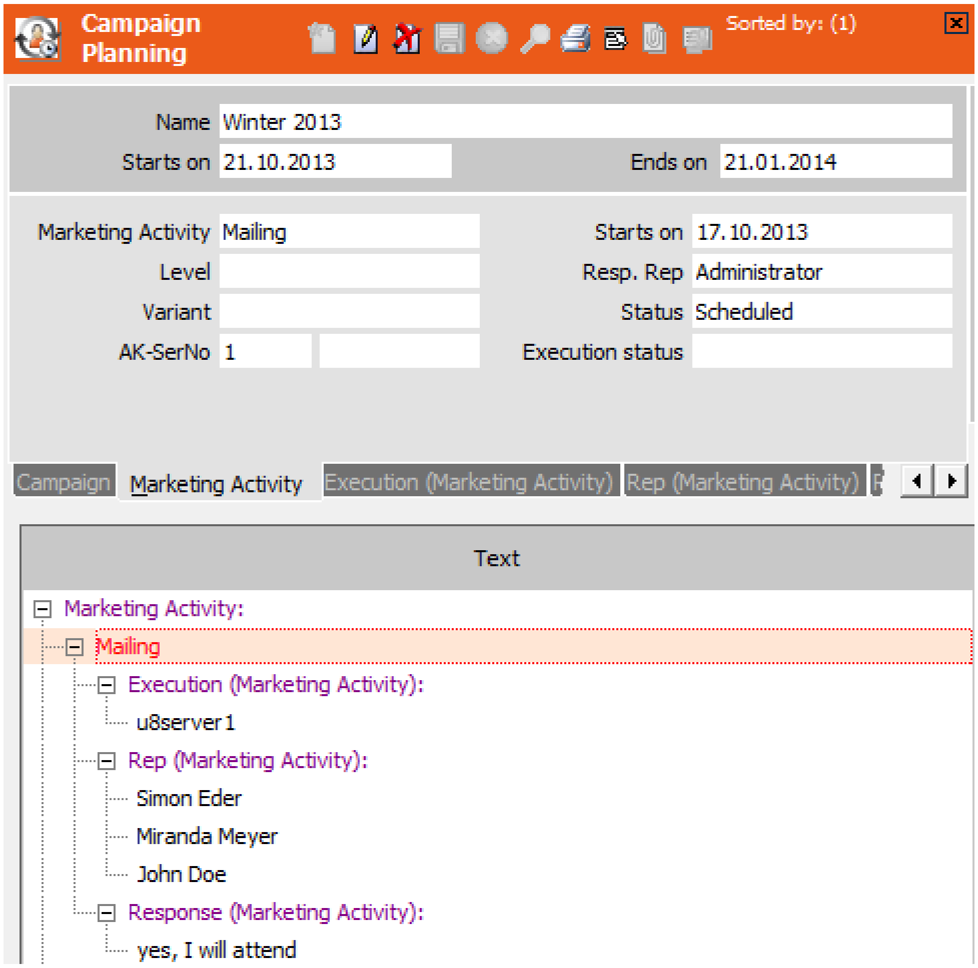
4. Choose one of the following options:
   - **Add new**: Adds a new campaign.
   - **Template:** Adds a new campaign based on the current campaign.

     Enter a start date for the campaign in the **Starts on** field. All other dates are transferred from the template and adjusted to the new start date.

     The campaign-specific records in the **Campaign**, **Marketing Activity**, **Rep (Marketing Activity)**, **Response (Marketing Activity)** and **Execution (Marketing Activity)** info areas are duplicated (with a new serial number). All those fields that are filled out during the initial planning stage of a campaign are transferred (e.g. **Type**). The contents of fields that are calculated or entered in the course of the campaign (e.g. statistical fields) are not copied.

     Data is not copied from the following info areas: **Statistics (Marketing Activity)**, **Log (Marketing Activity)**, **Target Group (Marketing Activity)**, **Activity, Mailing** and **Work Order**.

     If the template campaign includes responses in the **Response (Marketing Activity)** info area that lead to follow-up marketing activities within the same campaign, the follow-up marketing activities are also duplicated (i.e. copied to new records with new serial numbers) within the new campaign. If, however, the marketing activity is added for another campaign or is campaign-independent, the original follow-up marketing activity including the original station and serial numbers is used.
   - Refresh: Displays an overview of the most important information in the current campaign. You can also edit the campaign.
5. Confirm with **OK**.

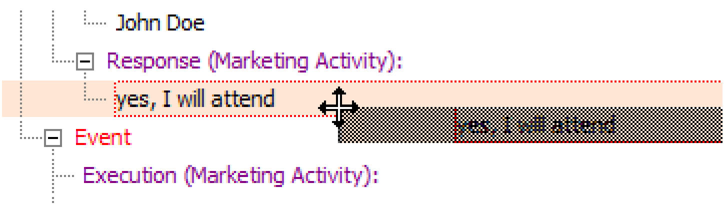


6. You can edit the fields in the upper portion of the window. An overview of the campaign is displayed below. Marketing Activity names are displayed in red. Dependent info areas are displayed in purple and additional information in black.

Note: Your administrator can determine which information is displayed in tree view (configured in the desktop settings, see Fields Tab in the *Aurea.CRM win Administrator Guide*).

---

7. To add a new dependent record (**Marketing Activity**, **Execution (Marketing Activity)**, **Rep (Marketing Activity)** and **Response (Marketing Activity)**), click on the name of the corresponding info area in the overview and then on (**New**). Enter the details in the upper portion of the mask.
8. You can also edit dependent records by clicking on them in the overview, editing them in the upper portion of the mask and saving them with (**Save**).
9. To define the follow-up marketing activity for a specific response, click on the response, hold down the mouse button for a few seconds, and drag the response to the desired marketing activity. The marketing activity is entered in the **Follow-up Act.** field in the response.



10. Select **Save Plan** from the context menu.

> **Note:** This step is required to save your changes. Otherwise the changes are lost as soon as you leave the **Campaign Planning** info area.

11. Select **Load Campaign** from the context menu to switch to the campaign record.

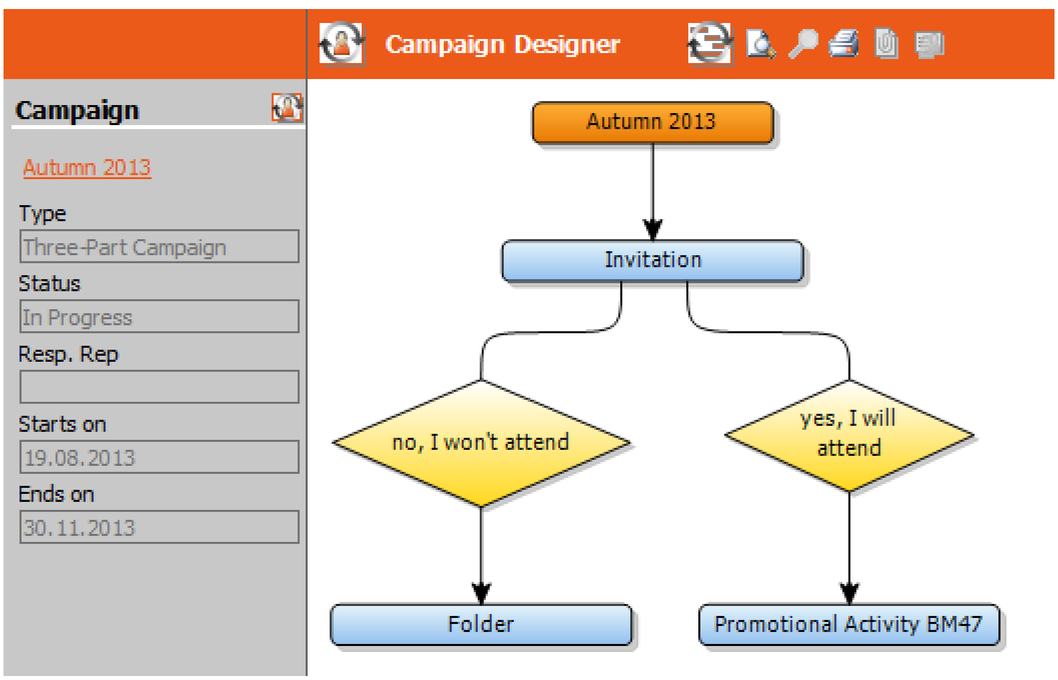
Campaign Designer

The campaign designer provides you with a graphical overview of your campaign's structure. You can display existing marketing activities and responses and add new ones.

To edit a campaign in the campaign designer:

1. Select **Campaign Designer** from the context menu in the **Campaign** info area.

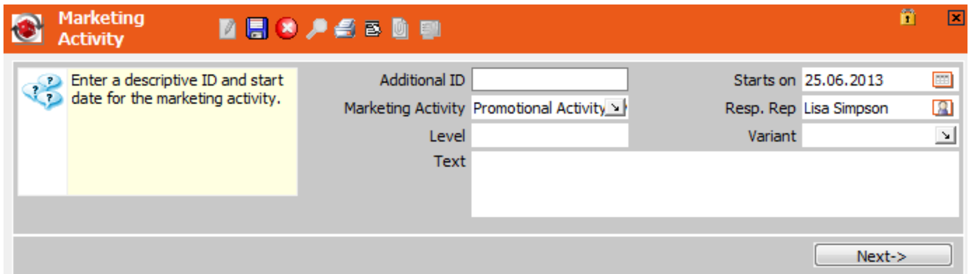
   Details on the campaign are displayed to the left. A graphical overview of the campaign is displayed to the right.



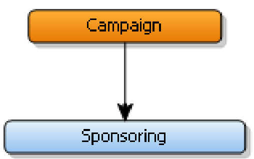
2. Right click on the campaign element and select **New: Marketing Activity** to add a marketing activity to the campaign.
3. You can choose from the available marketing activity templates.

Note: You can choose from those marketing activities where "Template" is entered in the **Status** field. Leave fields that directly affect the campaign empty (**Campaign Status, Campaign Key, Campaign Type, Campaign Starts on, Campaign Ends on**). This data is automatically transferred from the current campaign.

An overview of the new element is displayed at the bottom of the screen.



4. Click on **Next** and **Back** to navigate between fields in the marketing activity. Enter the desired data.
5. Save the marketing activity. It is displayed in the graphical overview.

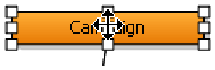


6. You can edit the marketing activity in the following ways:
   - Select the corresponding entry from the context menu to display/create/edit responses or reps (entered in the **Rep (Marketing Activity)** and **Response (Marketing Activity)** info areas). New responses added to the marketing activity is also added to the campaign overview, once the response has been saved. New responses are added without a follow-up marketing activity assigned.
   - Close the marketing activity mask and add further elements to the campaign. You can assign responses to marketing activities, and marketing activities to responses and the campaign).

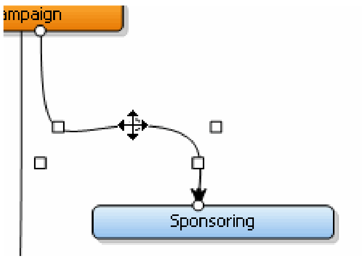
Note: You cannot edit the campaign until you have closed the mask at the bottom of the screen.

- Right-click on an element and select Delete from the menu to delete it and all dependent elements.
- Right-click on an element and select Edit from the menu to edit the element. The element is displayed in mask view at the bottom of the screen.

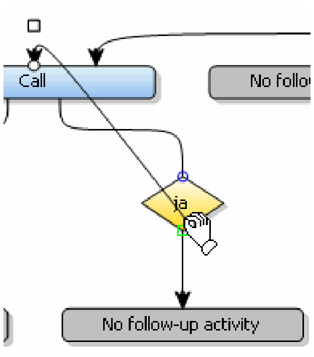
7. You can use the mouse to edit the graphical overview and flow of the campaign:
    - Reposition an element:



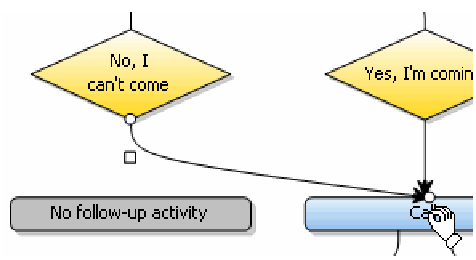
    - Reposition a connector:



    - Link a marketing activity to a response without a follow-up marketing activity (drag the top end of the connector):



    - Link a response without a follow-up marketing activity to a marketing activity (drag the arrow end of the connector):



8. Right-click on an empty area in the campaign designer to access the context menu. The following options are available:
    - **Enlarge:** Enlarges the graphical overview.
    - **Shrink:** Shrinks the graphical overview.
    - **Full View:** Zooms the overview such that the entire overview fits on screen.
    - **Original View:** Reverts to the original view.

- **Rearrange:** Rearranges the elements.
- **Arrange Connections:** Rearranges the connections between elements.

9. Click on (**Marketing Calendar**) in the command bar to display the marketing calendar at the bottom of the screen, see Marketing Calendar on page 224.

Calculating Campaign Statistics

Select **Calculate** from the context menu in the **Campaign** info area to calculate the statistics relating to the campaign. You can choose to calculate statistics for all campaigns or just the current one. The status of all activities, mailings and work orders is automatically calculated and entered in the corresponding activities, mailing and work order statistics fields in the campaign mask.

The target, actual and target percentage are calculated for the campaign from all its marketing activities (in the **Points - weighted (Act./Target/%)** fields).

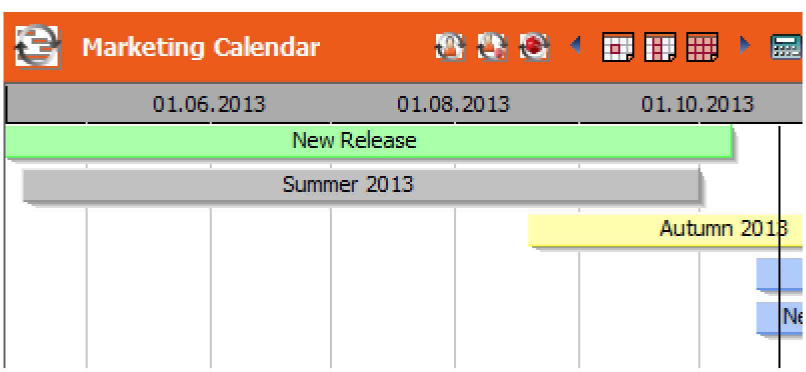
Marketing Calendar

The **Marketing Calendar** info area displays a graphical overview of marketing activities and campaigns.

To access the **Marketing Calendar** info area:

- Select **Marketing Calendar** from the context menu in the **Campaign** info area.
- Select **Info > Marketing Calendar** from the menu.
- Click on **Marketing Calendar** in the icon bar.

Click (**Marketing Calendar**) in the campaign designer.



The graphical overview displays campaigns and/or marketing activities as bars. The bar is colored depending on the status of the campaign or marketing activity: blue (scheduled), yellow (in progress), green (done), red (canceled), gray (archived).

You can define further options for the marketing calendar with the buttons in the toolbar, see Buttons in the Marketing Calendar and Marketing Calendar Settings.

Campaigns are displayed if the current date is in the time period entered in the **Starts on** and **Ends on** fields. Marketing Activities are displayed if the current date is in the time period starting with the **Starts on** date and ending on the latest of the following dates entered in the **Execution (Marketing Activity)** info area: **Gen. Date (Scheduled), Gen. Date (Actual), Edit target group until, Response possible until**.

If marketing activities are repeated, this is indicated by the symbol.

- If status of the campaign is "Completed" or "Archive": If the **Points -weighted (%)** field contains a value, this value is displayed. Otherwise the value in the **Points (%)** field is displayed.
- If the status of the marketing activity is "In Progress", "Completed" or "Archive":

If the **Points (%)** field contains a value, this value is displayed.

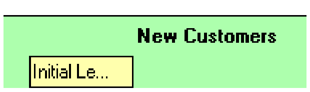
If not, if the **With Response** field contains a value, the following value is displayed: 100 * **With Response** / (**Activities - total (Act.)** + **Mailings - total (Act.)** + **Work Orders - completed (Act.)** + **Work Orders - open (Act.)**).

If the **With Responses** field is also empty, the following value is displayed: 100 * (**Mailings - no result (Act.)** + **Activities - no result (Act.)** + **Work orders - open (Act.)**) / (**Activities - total (Act.)** + **Mailings - total (Act.**) + **Work Orders - completed (Act.)** + **Work Orders - open (Act.)**).

Double-click on a bar to display the corresponding campaign or marketing activity. If the marketing activity is part of a campaign, the campaign is displayed in the summary index card.

Buttons in the Marketing Calendar

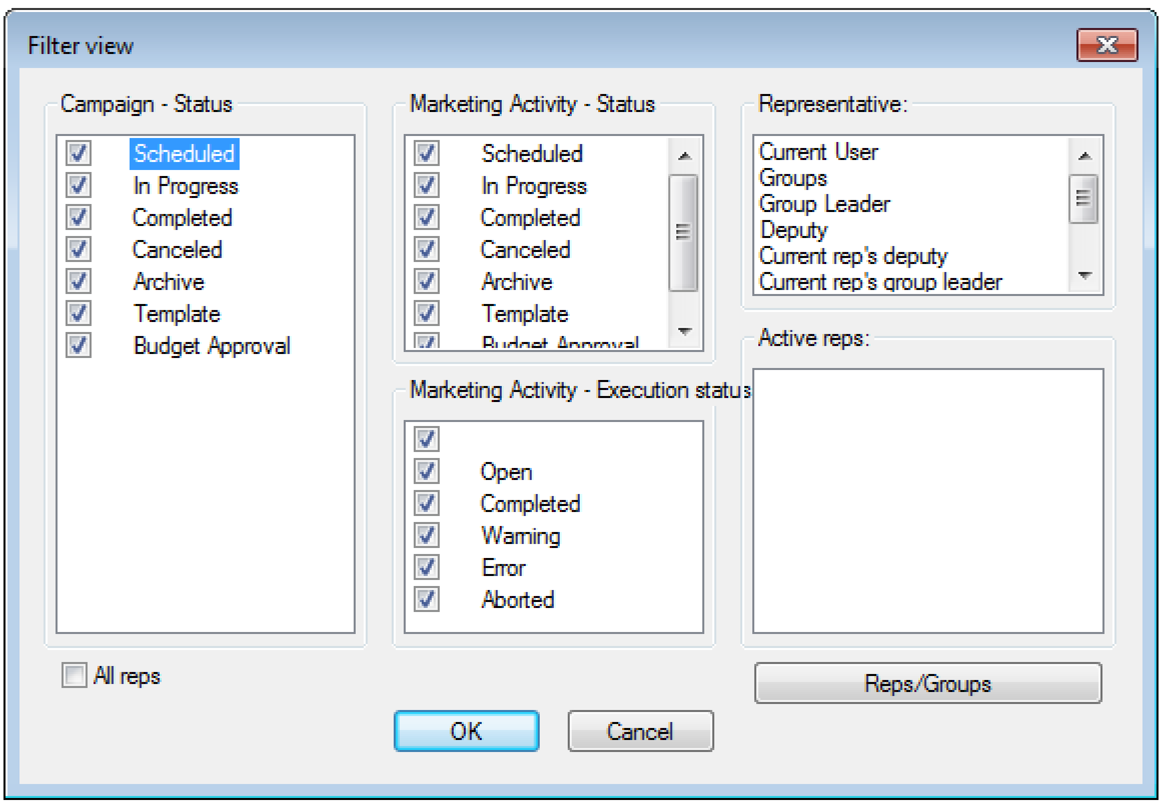
The following buttons in the command bar are specific to the **Marketing Calendar** info area:

	Restricts the display to campaigns.
	Displays campaigns and all marketing activities that are part of a campaign. Campaigns are displayed in bold, marketing activities with normal font. Marketing activities are displayed on a different row below their campaign. The order depends on the start date.  Click on the arrow at the right of a bar to display or hide a campaign's marketing activities.
	Restricts the display to marketing activities.

	Moves the time period displayed forward or backwards.
	Displays the monthly view.
	Displays the quarterly view.
	Displays the yearly view.
	Recalculates the statistics for all campaigns/marketing activities.
	Accesses the marketing calendar settings, see Marketing Calendar Settings.

Marketing Calendar Settings

Click  (**Filter view**) to determine which marketing activities and campaigns are displayed.



The following criteria are available:

- **Campaign - Status:** Status of the campaigns
- **Marketing Activity - Status:** Status of the marketing activities
- **Marketing Activity - Execution Status:** Execution status of the marketing activities

- **Representative:** The reps whose marketing activities and campaigns are displayed.
- **All reps:** The campaigns and marketing activities for all reps are displayed.
- **Reps/Groups:** Click this button to select specific reps or groups whose campaigns/marketing activities are displayed. The selected reps are displayed under **Active Reps**.

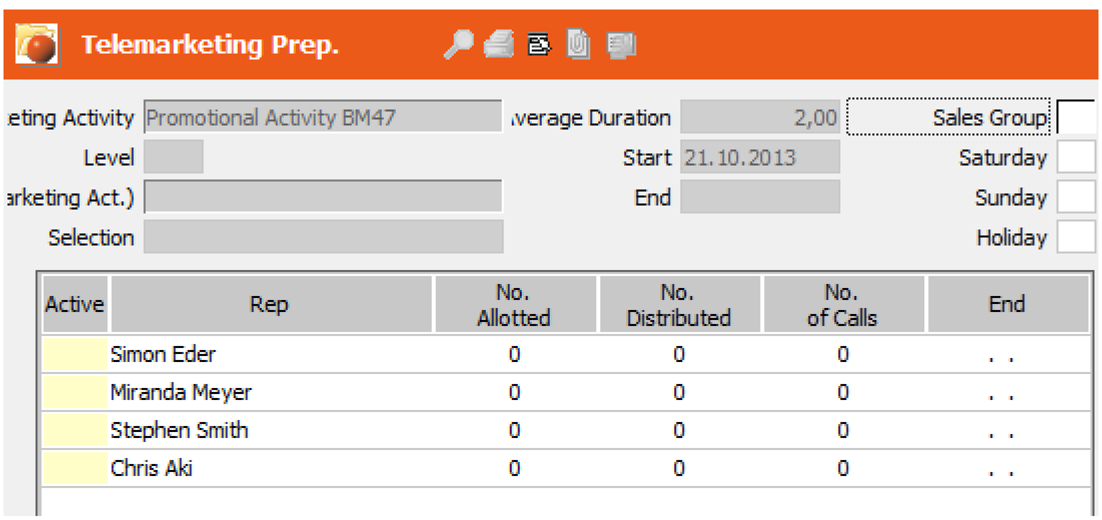
Telemarketing Preparation (BTB only)

Use the **Telemarketing Prep.** info area to determine that customers/prospects are to be contacted by telemarketing reps.

The **TM Rep** field must be enabled in the corresponding rep records, and telemarketing work hours must be entered in the **Mon from (morning)** - **Fri to (afternoon)** fields.

To do so:

1. Add the marketing activity.
2. Add a record to the **Act. Execution** info area, enable the **Telem. Activ.** check box (**Generate** tab) and enter the **Average Duration** of the phone calls.
3. Switch to the **Marketing Activity** info area and select **TM Prep.** from the context menu.



The upper left portion of the mask contains information relating to the marketing activity and its duration.

The reps are listed for whom the **TM Rep** field is enabled in the **Rep** info area.

Note: Depending on your access rights, either all reps or only the current rep are displayed, see Defining Further Settings (**Appointment Distribution Settings** pane) in the **Rights** topic in the *CRM.core Administrator Guide*.

---

4. Enable the **Active** cell for those reps that should participate in the marketing activity.
5. Select **Load Selection** from the context menu and choose the selection that contains your target group.
6. Enable the **Sales Group** check box to assign the rep entered in the **TM Rep** field in a company's sales group to that company's activity records, see Adding Sales Groups in the *BTB Business Logic Manual.*
7. Enable the **Saturday, Sunday** and **Holiday** check boxes to carry out the telemarketing activities on these days as well.
8. Select **Preview** from the context menu to display a preview of the calls.

   The **Number** of telephone calls assigned and the **End** of the marketing activity are displayed for each rep.
9. Select **Add Activities** from the context menu to generate the activity records.

The activity records can now be edited by the telemarketing reps in the **Activity** info area.

Note: If you have selected several reps, and less telemarketing hours have been entered for one rep than for the others, the appointments are still distributed uniformly amongst all reps.

Events

Aurea.CRM allows you to depict the thematic and organizational structure of events by adding events as campaigns.

Executing the following steps to add events as campaign:

- **Planning:** Estimate the number of attendees, select a venue and lecturers and create an agenda, see Planning Events on page 229.
- **Approval:** Submit the event for budget approval and/or to verify that the event complies with applicable legal provisions, see Approving Events and Verifying Compliance on page 232.
- **Execution:** Generate the target group, add any necessary customers, send out invitations, administrate the attendees and organize hotels and transfers, see Executing Events on page 234.
- **Follow-up:** You can evaluate the event and monitor costs, see Rating Events on page 235 and Calculating Event Costs on page 237.

Your administrator can define campaign templates that support you in planning and managing your events. These campaign templates can already include marketing activities, e.g. sending out invitations. Follow-up marketing activities may also be defined for individual marketing activities based on the responses received (e.g. responding "Yes, I will attend" to the invitation results in the recipient being assigned to the follow-up "Event" marketing activity).

If the event is held at an external venue (e.g. a hotel), the venue must be entered as a company in the Aurea.CRM database. Furthermore, all attendees including speakers must be present as persons in the database.

For general information on campaigns and marketing activities, see Marketing Activities on page 194. Functions specific to events are described in the following sections.

Planning Events

Learn how to plan an event.

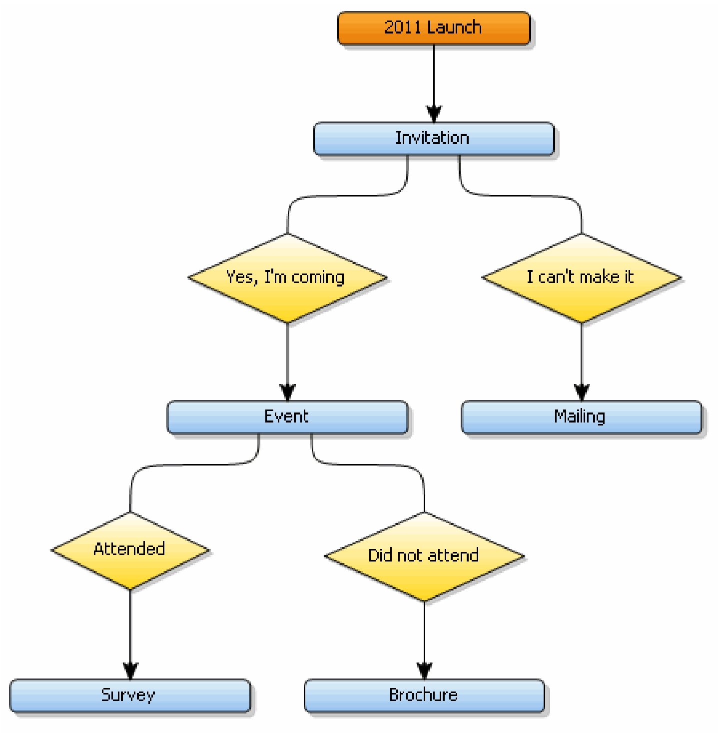
To plan an event:

1. Add a new campaign (see Campaign Info Area) and enter the start date (required to calculate the event's rating).
2. Enter yourself as the **Resp. Rep** in the campaign (so that you receive any messages concerning the approval of the event).
3. Add the necessary marketing activities such as sending out invitations, the main event itself, mailings (for persons that cannot attend), a survey (for feedback from persons that attended the event) and sending out brochures, see Defining Marketing Activities on page 197.
4. Add responses for the marketing activities, see Response (Marketing Activity) on page 199.

   Enter a follow-up marketing activity in the response to determine which follow-up marketing activity respondents are assigned to.

   The values in the **Registration** and **Participation Status** fields in the **Response (Marketing Activity)** info area are used to manage marketing activity attendees, see Attendee Management.

   Example:



Responses to the "Invitation" marketing activity:

- Response "Yes, I'm coming": Follow-up Marketing Activity "Event", Registration "Register"
- Response "I can't make it": Follow-up Marketing Activity "Mailing", Registration "Unregister"

Responses to the "Event" marketing activity:

- Response "Attended": Follow-up Marketing Activity "Survey" and Participation Status "Participated"
- Response "Did not attend": Follow-up Marketing Activity "Brochure" and Participation Status "Missed"

5. Enter the details of the hotels and venue, see Hotels and Venues.

Note: Enter information on any required equipment in the **Equipment** info area. For more information on the individual fields in this info area, refer to the online field help.

---

6. Add the event's agenda, including lecturers and topics, see Creating an Agenda.
7. You can create a selection containing the companies and persons that should attend the event, see Selections on page 93. You can also add attendees manually.
8. Ask for quotes and enter the estimated costs of the event in the **Costs: Entire event** field.

9. Submit the event for approval, see Approving Events and Verifying Compliance on page 232.
10. Once the event has been approved, it can be executed, see Executing Events on page 234.

Hotels and Venues

Hotels, venues and other partners (e.g. catering, entertainment, etc.) must be entered as companies in Aurea.CRM. Enter information such as "Hotel", "Event Management" etc. in the **Co. Type** – **Co. Type 5** fields, in order to make it easier to search for these companies.

Enter the corresponding company in the **Event Location** field in the campaign or marketing activity.

Creating an Agenda

You can add an agenda for each marketing activity representing an event or track. Add agenda items to the agenda, such as lectures, coffee and lunch breaks, entertainment etc.

To add an agenda item:

1. Switch to the desired marketing activity and select **Agenda Item** from the context menu.

   Note: You can add agenda items to campaigns for events consisting of only a single track.

2. Click on (**New**).
3. You can:
   - First select the topic in the **Lecture subject** field. You can then select a speaker assigned to this topic by selecting **Select Speaker for Topic** from the context menu.
   - Or, first select the speaker in the **Person** field. You can then select a topic assigned to this speaker by selecting **Select Topic for Speaker** from the context menu.

     For information on speakers and topics, see **Adding Speakers** and **Adding Lecture Subjects** below.

4. Enter further information, such as the time and location.
5. Switch to the **Speaker** tab to enter further information such as the date of the invitation, the date of confirmation and fee.
6. Save.

Adding Speakers

Speakers must be added to Aurea.CRM as a **Person** or **Person in Company** record. Enter "Speaker" in the **Person Type** – **Person Type 5** fields, in order to make it easier to search for these persons.

Adding Lecture Subjects

Add topics available for all events in the **Lecture Subject** info area. The **Lecture Subject** info area is also used to link speakers to topics.

To add a new topic:

1. Switch to the **Lecture Subject** info area.
2. Click on (**New**).
3. Enter details on the lecture subject, such as the category, title, duration and language.
4. Select **Lecture/Speaker** from the context menu.
5. Enter the speaker (**Company** and **Person** fields).
6. Save.

To add a new topic from a person (a speaker):

1. Switch to the desired person.
2. Select **Lecture/Speaker** from the context menu.
3. Click on (**New**).

   The person is entered automatically.
4. Enter details on the lecture subject, such as the category, title, duration and language.
5. Save.

Approving Events and Verifying Compliance

Learn how to approve events and verify compliance.

Approval consists of two steps:

1. The rep submits the event for approval, see Requesting Approval or Verification.
2. The responsible person approves the event and/or verifies that it complies with necessary regulations, see Approving or Verifying Events.
   - Approval: An employee, e.g. head of marketing, must approve whether the planned event is within budget.
   - Compliance: An employee, e.g. from the legal department, verifies that the event complies with the legal requirements. This can be of particular relevance in the pharmaceutical industry.

   The employee responsible for approving or verifying the event is notified using a To-Do record.

Note: Your administrator can determine via the rights definition that you are unable to access campaigns based on the status of the approval process, see Rights in the *CRM.core Administrator Guide.*

Requesting Approval or Verification

The rep that scheduled the event submits the campaign for approval.

To submit an event for approval:

1. Switch to the desired campaign.
2. Switch to the **Budget Approval/Verification** tab.
3. Enable the **Budget Approval Required** check box and enter the person responsible for approving the event in the **Budget Approval by** field.
4. Enable the **Verification Required** check box and enter the person responsible for verifying the event complies with legal provisions in the **Verified by** field.

   Note: The campaign's start date must be in the future, otherwise the **Budget Approval Required** and **Verification Required** check boxes cannot be enabled. If the start date is not in the future at the time of submission, these check boxes are disabled automatically by the system (without notification).

5. Save the record.

The campaign is forwarded to the employee responsible for approving/verifying the event.

You receive a message when the campaign has been approved or verified.

Approving or Verifying Events

If you are authorized to approve or verify campaigns, To-Do records are added for those campaigns requiring approval/verification.

To approve or verify a campaign:

1. Click on the link to the campaign in the To-Do record. The campaign is opened. Verify that the event is within budget or that all legal requirements are met.
2. Select **Budget Approved** or **Verified** from the context menu.

   The campaign is approved or marked as verified, and the event can now be executed.

   Note: You can also manually change the campaign's status (**Status** field) to "Scheduled" instead of using the context menu entries to manually approve the event. The context menu entries also set the campaign status to "Scheduled". Campaigns whose status is "Budget Approval" cannot be executed.

3. If a campaign has already been approved, select **Retract Budget Approval** or **Not Verified** from the context menu to retract your approval.
4. Save the record.

   The current date is entered in the **Budget Approval on** or **Verified on** field.

   A corresponding message outlining the changes is sent to the rep responsible for the campaign.

Note: You can reject an event by setting the **Participation Status** to "Denied" in the To-Do record. You can only reject an event from the **Campaign** info area if you have already approved it.

Executing Events

Once an event has been approved, you can begin executing the event in Aurea.CRM win

Follow the below steps:

1. Switch to the marketing activity you wish to execute (e.g. the "Invitation" marketing activity).

   Select **Execution (Marketing Activity)** from the context menu and add a marketing activity execution record, see Execution (Marketing Activity) on page 200.

2. Select **Generate** from the context menu in the **Marketing Activity** info area. Click on **Start**.

   Target group records are generated based on the specified selection, see Generating the Target Group on page 204

3. In the **Generate** dialog box click on **Start** again.

   The desired activities, mailings and work orders are generated, see Executing Marketing Activities on page 212.

4. Upon receiving responses, e.g. to invitations, enter the responses, see Attendee Management.
5. You can determine the lectures an attendee attends, see Participant Program.

Attendee Management

Attendees can be assigned automatically based on responses in previous marketing activities, or added manually by the responsible rep.

You can manage attendees for each marketing activity in two ways:

- By changing the **Participation Status** in the attendee record (Registered, Confirmed, Canceled, Participated, Missed).
- By entering responses in the generated activities, mailings or work orders. Depending on the **Registration, Participation Status** and **Follow-up Marketing Activity** defined for the responses in the planning phase (see Planning Events on page 229), attendees are added or edited automatically:
  1. Select **Edit Activity** from the context menu in the **Marketing Activity** info area.
  2. Enter the response for each activity, e.g. "Yes, I’m coming" or "I can’t make it" for invitations, or "Attended" or "Did not attend" for the main event.

     Whether an attendee record is generated or needs to be added depends on the value entered in the following fields in the response:

     Registration field:

Register: A target group and attendee record are automatically added (**Participation Status** = "Registered" and **Registered on** = current date) for the follow-up marketing activity entered (e.g. the event).

Unregister: A target group record (but **no** attendee record) is automatically added for the follow-up marketing activity entered (e.g. the mailing).

Participation Status field:

Participated: The participation status in the attendee record is set to "Participated" and a target group record is added for the follow-up marketing activity (e.g. survey).

Missed: The participation status in the attendee record is set to "Missed" and a target group record is added for the follow-up marketing activity (e.g. brochure).

3. If you change the response at a later date, the target group and attendee records are updated: "Yes, I'm coming" -> "I can't make it": The attendee record for the follow-up marketing activity (event) is set to "Canceled"', the registration date is deleted and the cancellation date entered. The target group record added for the original follow-up marketing activity is deleted, and a new target group record is added for the new follow-up marketing activity.

Note: When entering responses, ensure that you only select a single answer. Multiple responses can lead to undesired results.

Participant Program

To create a program for an individual attendee, add a participant program:

1. Select **Attendee** from the context menu in the **Marketing Activity** info area.
2. Switch to the desired attendee and select **Participant Program** from the context menu.
3. Click on (**New**).
4. Select an agenda item.
5. Save.

Rating Events

Once an event has been held, you can collect information on how the attendees rated the event using a questionnaire.

This rating can then be entered in Aurea.CRM. Ratings can be entered for the venue, speakers and accommodation.

Rating Speakers

To rate a speaker:

1. Switch to the attendee record.
2. Select **Participant Program** from the context menu.

All agenda items entered for the attendee in the participant program are listed.

3. Select an agenda item and enter the rating from the questionnaire in the **Speaker Rating** and **Lecture Rating** fields.
4. Enter ratings that should not be assigned to an attendee record directly in the agenda item record. Enter the sum total of the ratings in the **Anonymous rating: Lecture (Total)** and **Anonymous rating: Speaker (Total)** and enter the number of evaluations in the **Anonymous rating: Lecture (Number)** and **Anonymous rating: Speaker (Number)** fields. The ratings are weighted according to the number of evaluations in the overall rating.

Rating the Venue and Hotels

To rate the venue and hotels:

1. Switch to the desired marketing activity or campaign.
2. Select **Attendee** from the context menu.
3. Enter the rating of the venue in the **Rating: Venue** field.
4. Switch to the **Hotel** tab and enter the hotel’s rating in the **Rating: Accommodation** field.

Calculating the Rating

You can calculate the average rating of the event, accommodation and speakers based on all the individual ratings.

To calculate the rating:

1. You have two options:
    - Switch to the campaign or marketing activity and select **Calculate Accommodation/Venue Rating** from the context menu.
    - Or select **Calculate Lecture/Speaker Rating** from the context menu of an agenda item.
2. Enter a start date. All events/agenda items with the same or a later start date are included in the calculation.

The mean of all ratings is written to the following fields:

- Agenda item: Speaker Rating and Lecture Rating
- Lecture/speaker record with the same topic and speaker: Lecture Rating
- Speaker’s person record: Speaker Rating
- Company record corresponding to the location of the event or campaign: Rating: Venue
- Company record

Note: Your administrator can add a To-Do record for CRM.server in order to calculate the rating automatically, see CRM.server in the *CRM.core Administrator Guide*.

Calculating Event Costs

Learn how to calculate event cost.

When holding an event, various costs are accrued, e.g. for renting rooms, transportation costs etc. You can enter the costs for accommodation (hotel) and transport in the corresponding attendee records. The data entered for all attendees is totaled by the system and displayed in the campaign record.

To displayed the total costs of a campaign:

1. Switch to the desired campaign.
2. Switch to the **Costs** tab. The following costs are totaled for all attendees:
   - Accommodation costs in the **Costs: Hotel** field.
   - Transportation costs in the **Costs: Transport** field.
   - Costs paid by the attendee themselves in the **Costs: Own Contribution** field.
3. The total costs for other expenditure, e.g. room rent, equipment, fees and travel expenditure can be entered in the **Costs: Entire Event** field.
4. Select **Calculate** from the context menu.
5. Click on the **Current** button.

The event costs are distributed evenly amongst all attendees whose participation status is "Participated". This value is written to the **Costs: Participation** field in the attendee record.

Note: Records in the **Equipment** info area are not included in the calculation.

Document Management

Aurea.CRM allows you to store documents directly in the database in a compressed format and to link them with various info areas in the database.

You can store documents as document records (see Document Records on page 238), or enter documents in document fields in records (see Document Fields on page 245).

Document Records

Learn how to create delete, export and manage documents

Documents can be added in three info areas, see Creating a New Document on page 239:

- The **Document** info area is used to store general documents that are not customer-specific (such as templates for offers).

You can classify your documents using the **Document Class** field. Use the drop-down list in the **Document** info area to determine the type of document you wish to display.

Note: For information on communicating general documents with Aurea.CRM, see Communicating Documents (D1) in the *Aurea.CRM win Administrator Guide*.

- You can add customer-related documents from the **Customer Document** info area.

Select either **Company-Related Info** or **Person-Related Info** from the **Data** menu to determine whether documents are added for companies or persons.

Note: Aurea recommends adding customer-related documents to the **Document** info area, i.e. from the **Document overview**.

- Add documents that can be linked to any number of other records from the **Document overview** level.

For example, you could associate the minutes of a meeting with an activity record and all persons that attended the meeting, or you could associate an offer document with several activities.

To display all the documents associated with a record, switch to the desired record and click on the  button (**Document overview**). The **Document overview** info area is displayed.

To view the records with which a document is associated, switch to the document in the **Document** info area and select **Document link** from the context menu. The **Document link** info area is displayed.

Links can be added and deleted from both the **Document link** and **Document overview** info areas. A link added from one of the info areas is also displayed in the other.

All documents added to the database in this manner are stored in the **Document** info area.

Select **Overview** from the context menu in the **Document overview** to display those documents linked to another record using the **Link** field, but are linked to the current company/person (via the **Company** and **Person** fields) or marketing activity (via the **Marketing Activity** field).

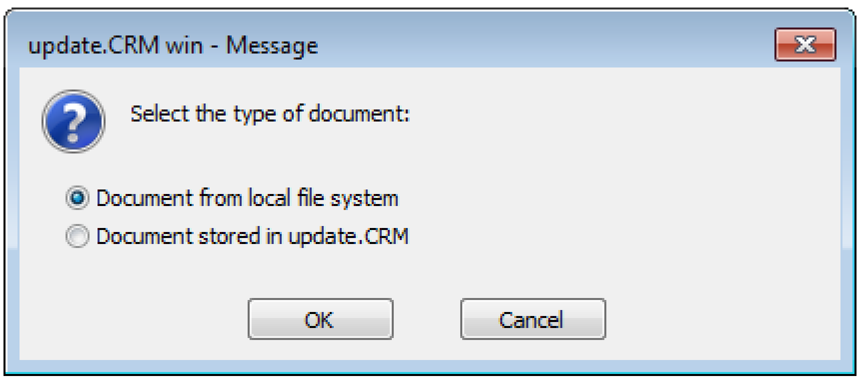
Creating a New Document

Learn how to create a new document.

To add a new document

1. You can add documents as follows:
   - Switch to the **Document** info area and click on (**New**).
   - Starting from a company or person switch to the **Customer Document** info area and click on (**New**).
   - Click on (**Document overview**) in a record's header to add a document linked to the record. Click on (**New**).

     The following dialog is displayed:

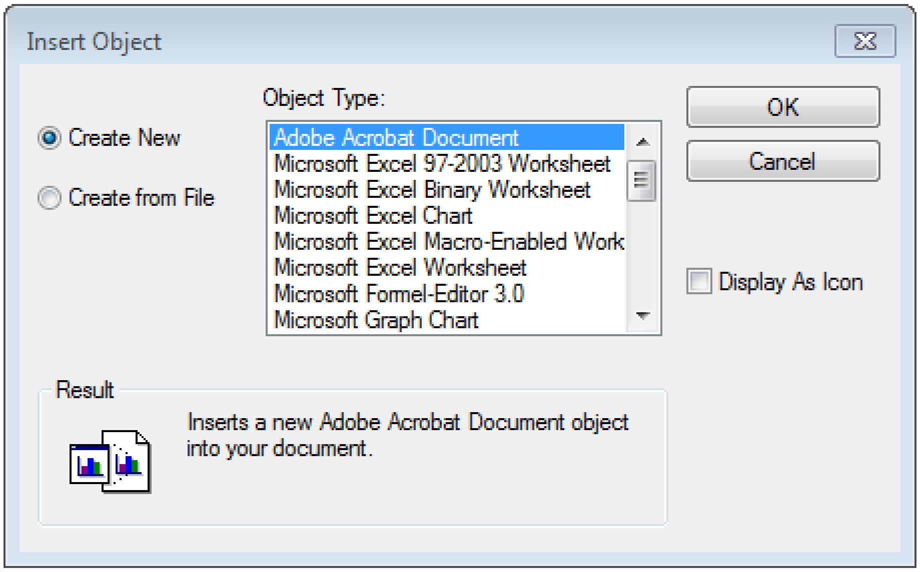


2. Select **OLE Document (object)** and click **OK**.

Note: Your administrator can determine that documents are always added as OLE documents or standard documents, see **Desktop / Global Settings / Misc. Tab** in the Aurea.CRM win Administrator Guide.

You can only add documents from your local file system with the **Standard document** option, see Assigning Documents from your File System to Records.

The **Insert Object** dialog is displayed.



3. Select **Create New**.
4. Select the **Object Type** from the list.
5. The application is started and an empty document is displayed.
6. Edit the document.
7. Close the application.
8. Answer **Yes** when asked if you wish to save the document in the database.
9. You can enter a **Keyword** in the document record to make finding the document easier.
10. Enable the **Private** check box to prevent other users from accessing the document.
11. The **Format** and **Application** are entered automatically.
12. Save the record.

Note: When closing the associated application or Aurea.CRM win, you are prompted to save the document.

Assigning Documents to Records

Learn how to assign documents to records.

You can assign local documents to records:

- In document info areas, see Assigning Documents from your File System to Records.
- Using drag & drop, see Assigning Documents with the Mouse.

To assign a document in the Aurea.CRM database to a record:

- Add a link from the document to the record, see Assigning an Aurea.CRM Document to a Record.
- Add a link to the document from the record itself, see Linking a Record to an Aurea.CRM Document.

Assigning Documents from your File System to Records

To assign a document in your file system to a record:

1. Assign the record using one of these methods:
   - Switch to the **Document** info area and click (**New**).
   - Switch to the **Customer Document** info area from the desired company/person and click on (**New**)
   - Switch to the record you wish to link with the document. Click on (**Document overview**) and click on (**New**). Select **Document from local file system**.
2. Choose whether to add an **OLE document** or a **Standard document**, see Assigning OLE Documents to Records and Assigning Standard Documents to Records.

   Note: Your administrator can determine that documents are always be added as OLE documents or standard documents, see Desktop / Global Settings / Misc. Tab in the *Aurea.CRM win Administrator Guide*.

3. You can enter a **Title** and **Keyword** to make it easier to find the document again.
4. Enable the **Private** check box if you wish to prevent other users from accessing the document.
5. The **Format** and **Application** are entered automatically.
6. Save the record.

Note: When you close Aurea.CRM win, **all** open OLE objects are also closed. When closing associated applications or Aurea.CRM win, you are prompted to save the document.

You can still edit the record after saving. Do not however subsequently define a standard document as an OLE document (**OLE** check box), as the document is longer found.

Assigning OLE Documents to Records

To assign an OLE document to a record:

1. Select **OLE document (object)**. The **Insert Object** dialog is opened.
2. Select the **Create from File**.
3. Enter the path and file name or click on **Browse** to search for the file. The file is opened in the associated application.

4. Edit the document as necessary.
5. Close the application.
6. Click on **Yes** when asked if you wish to save the document in the database.

Assigning Standard Documents to Records

Standard documents cannot be created from within Aurea.CRM win; only existing documents can be added to the database. No save prompt is displayed when closing Aurea.CRM win if a document is open.

To add a standard document:

1. Select **Standard document**.

   The Windows **Open** dialog is displayed.

   Note: The default folder is based on your settings, see Document Directories on page 247.

   ---

2. Select the desired document.

Assigning Documents with the Mouse

Your administrator can determine that you can assign document(s) to a record using drag & drop, see Configuration Info Area (**Documents** category, **Allow multiple file uploads / drag&drop** option) in the *CRM.core Administrator Guide.*

To assign one or more documents from your local file system to a record:

1. Switch to the desired record in the mask view (in view mode).
2. Drag the document(s) to the mask using the mouse.

If the mask contains several info areas that documents can be assigned to, select the target info area from the list.

The document is added to Aurea.CRM as a standard document, and a corresponding record is added to both the **Document** and **Document Link** info areas.

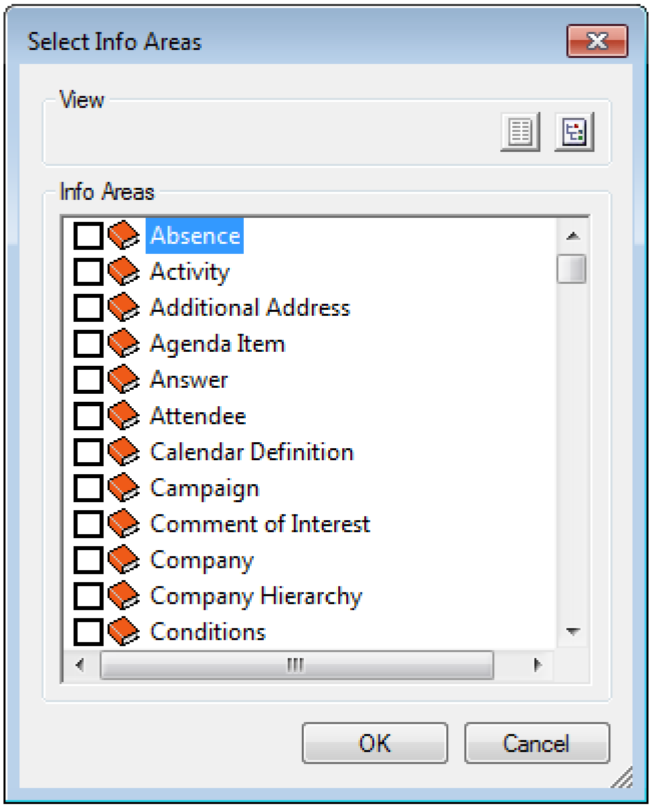
Your administrator can determine that a value is automatically entered in the **Document Class** field based on the document type, see Configuration Info Area (**Documents** category, **Document class used for drag&drop** option) in the *CRM.core Administrator Guide.*

Assigning an Aurea.CRM Document to a Record

To associate a document stored in Aurea.CRM with a record:

1. Switch to the desired document in the **Document** info area.
2. Select **Document link** from the context menu. The **Document link** info area is opened.
3. Click the **New** button to add a new link.

   The **Select Info Areas** dialog box is displayed.



4. Select the info area and click **OK**. The search mask is displayed for the selected info area.
5. Search for the record you wish to associate the document with, and confirm with **OK**. A link record is added. The **Link to Info Area** field contains the abbreviation of the target info area; the **Link** field contains a hyperlink to the associated record.
6. Save.

You can select **Document** from the context menu in some info areas to open the associated document.

To switch to the associated record from the document record, select **Document link** from the context menu and click on the hyperlink in the **Link** field.

Linking a Record to an Aurea.CRM Document

You can associate a record with any number of documents, provided the record's primary key includes the station number and a serial number:

1. Switch to the record you wish to link with a document.
2. Click (**Document overview**).
3. Click (**New**).
4. Select **Document stored in Aurea.CRM** from the dialog box and click on **OK**.
5. Search for the desired document in the dialog box and select it.
6. Confirm with **OK**.

A document link is created, linking the source record with the document.

Note: If you add a document link from a company-dependent or person-dependent info area, a document link is also added to the parent company and/or person record. Your administrator can configure how these additional links are added, see Configuration Info Area (**Documents** category, **No document link for companies/persons** option) in the *CRM.core Administrator Guide*.

Editing Documents

Learn how to edit documents.

To edit an existing document:

1. Switch to the document record and select **Open document** from the context menu. The document is opened in the associated application.
2. Edit the document and save it from the application.
3. Close the document or application.

You are asked whether you wish to save the document (twice for standard documents). Confirm with **Yes**.

The document is saved in the Aurea.CRM database, and can no longer be opened from outside Aurea.CRM. It may however still appear as a recent file in the **File** menu in the application.

Select **Load new document** from the context menu to replace the document in an existing record.

Exporting Documents

Learn how to save documents to local drives.

To save a standard document stored in the Aurea.CRM database on your hard disk:

1. Switch to the desired document record.
2. Select **Export** from the context menu.
3. Select the file name and path.
4. Confirm with **Save**.

To save an OLE document on your hard disk:

1. Switch to the desired document record.
2. Select **Open document** from the context menu. The document is opened in the associated application.
3. Select **File** > **Save as** in the application.
4. Select the file name and path.
5. Click on **Save**.

In both cases a copy of the file is saved. This copy is no longer linked to the document in the Aurea.CRM database. Any changes made to this document is not updated in the database.

Deleting Documents

Learn how to delete a document.

To delete a document:

Use the **Delete** button in the document info area. All document links (records in the **Document Link** info area) are also removed when the associated document is deleted. Hyperlinks to the document in document fields are **not** deleted, see Document Fields on page 245.

Document Fields

You can also enter documents in document fields in records.

If an info area does not contain enough predefined document fields, your administrator can define additional document fields, see Data Model in the *CRM.core Administrator Guide*.

Adding Documents to Document Fields

You can add documents from the following locations to document fields:

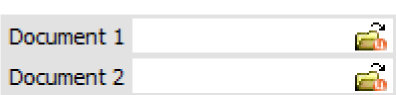
- From the file system (either saved as a **Path** or in the **Database**)
- From the **Document** info area
- From the **Customer Document** info area

Your administrator can determine which of these options is used by default in new and edit mode, see Desktop / Global Settings / Masks Tab in the *Aurea.CRM win Administrator Guide*:

If your administrator has determined that documents are searched for in the file system, the following icon is displayed in document fields:

Click this icon to access the Windows dialog box to select and open a document.

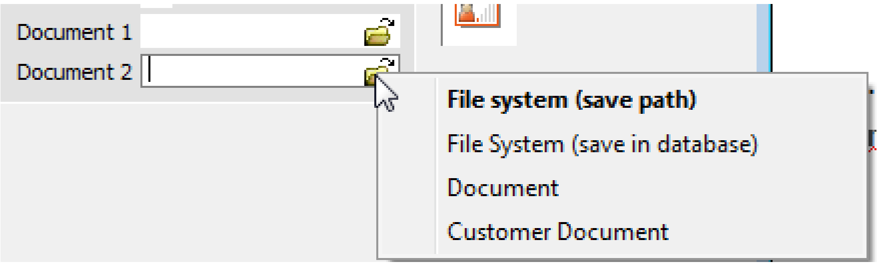
If your administrator has defined that documents are searched for in the **Document** or **Customer Document** info areas, the following icon is displayed:



Click this icon to access the search mask for the **Document** or **Customer Document** info areas where you can search the Aurea.CRM database for the desired document, see Executing the Search.

Note: The search engine only returns company-related documents when searching from the **Company** info area and person-related documents when searching from the **Person in Company** info area.

Right-click on the icon to select from the available options:



The default option (defined by your administrator) is displayed in bold.

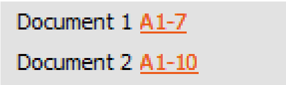
Only those search options that are possible in the current context are available. If you do not have the necessary rights to add documents to the Aurea.CRM database, then the **File System** option is unavailable. If the current info area is not linked to the **Company** or **Person** info areas, the **Customer Document** option is not displayed.

Note: If documents are entered in document fields in a company-dependent or person-dependent info area, the documents are saved in the **Customer Document** info area. Otherwise documents are saved in the **Document** info area, and a document link is added.

Opening Documents in Records

Hyperlinks in document fields can be displayed in a variety of ways, depending on the desktop settings made by your administrator, see Desktop / Global Settings /Masks Tab in the Aurea.CRM win Administrator Guide:

- using the document ID (e.g. K1000-42)



If the document is saved in the database, document ID has the form AX-Y or KX-Y (A for general documents, K for customer documents, X for the station number and Y for the serial number).

When editing a record, the document ID is always displayed.

- using the name of the document (e.g. "pfolio.txt")
- using a reference (e.g. "pfolio.txt, 23/12/2005")

To open the document:

Click on the hyperlink when in view mode.

In some info areas you can also access documents by selecting **Document** from the context menu.

Deleting Documents

To remove the document from a document field:

1. Switch to edit mode and delete the contents of the document field.
2. Switch to the **Document** or **Customer Document** info area and click on (**Delete**) to delete the corresponding record.

Document Directories

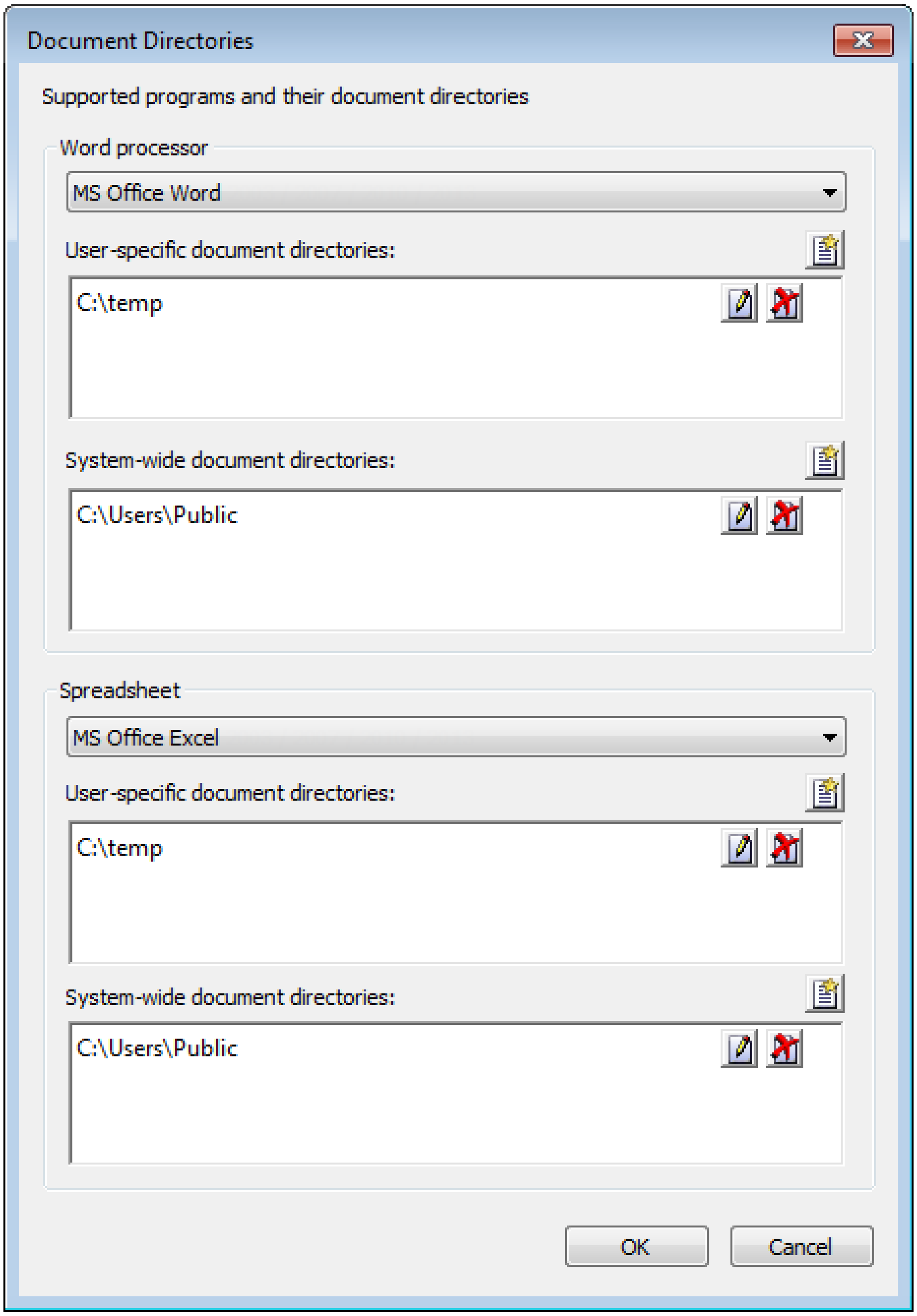
Your administrator can determine that the directory entered as your document directory is used by the Windows Open dialog when loading documents.

For further details, see Desktop / Global Settings /Masks Tab in the Aurea.CRM win Administrator Guide.

The user-specific directory takes precedence over the system-wide directory. If more than one directory has been entered, the first directory is used.

To configure your document directories:

1. Select **Extras** > **Document Directories** from the menu.



- The User-specific document directories fields contain the directories of a specific user, where documents are stored on the local hard drive.
- The System-wide document directories fields contain the directories that are available to all users over the network.

2. Click on (**New**) to select the directories used to store your documents.
3. Click on to edit the entry. Click on to delete the entry.
4. Confirm your settings with **OK**.

Field Types

Learn about the field types in Aurea CRM win.

The following are available:

	Numerical fields (integers, decimals or percentages)
	Text fields, see Text Fields on page 249
	Date fields, see Date Fields on page 252
	Time fields, see Time Fields on page 254
	Fixed fields
	variable catalog fields, see Catalogs on page 254
	Logical (Boolean) fields
	Rep fields, see Rep List on page 257
	Link fields, see Link fields on page 259
	Telephone fields, see Telephone Fields on page 260

Text Fields

Text is entered in text fields (e.g. **Last Name**).

The **Edit** menu provides several commands for editing text. These commands are only active if you are working in text fields or boxes.

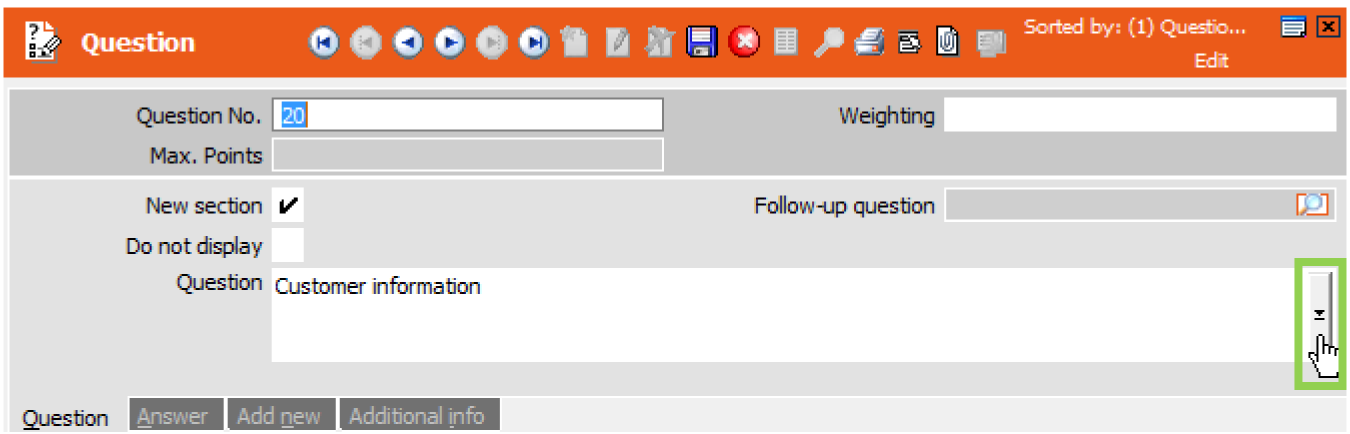
Note: You can use the TAB key when entering text in text fields. However, as TAB is used to switch between fields in the mask by default, you need to enable this feature first. Select **Extras > Other Options** from the menu and enable the **Tab in Text** check box.

If you wish to use Asian or other double-byte characters, you need to install the corresponding language under Windows (**Start** > **Settings** > **Control Panel** > **Regional and Language Options** > **Advanced**).

Multi-Language Text Fields

If the  (**Multi-Language Input**) button or button is displayed next to a text field, you can enter text in multiple languages. The corresponding text in then displayed in the current user's language.

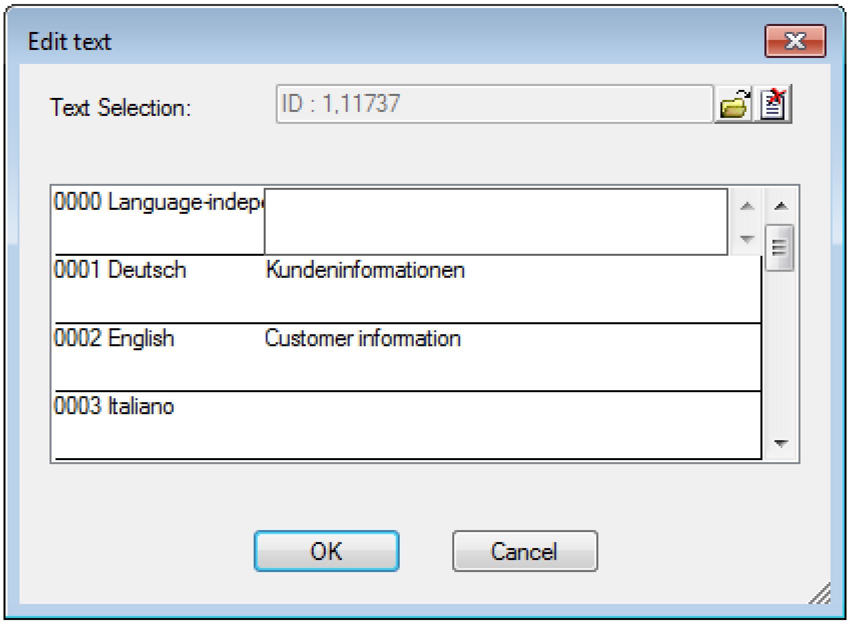
Multilingual text fields are available by default in the **Answer**, **Field Help**, **Question** and **Questionnaire/Portfolio** info areas. Your administrator can define additional multilingual text fields, see Multi-language Fields in the *CRM.core Administrator Guide.*



To enter texts in multiple languages:

1. Click on  (**Multi-Language Input**) or next to the text field.

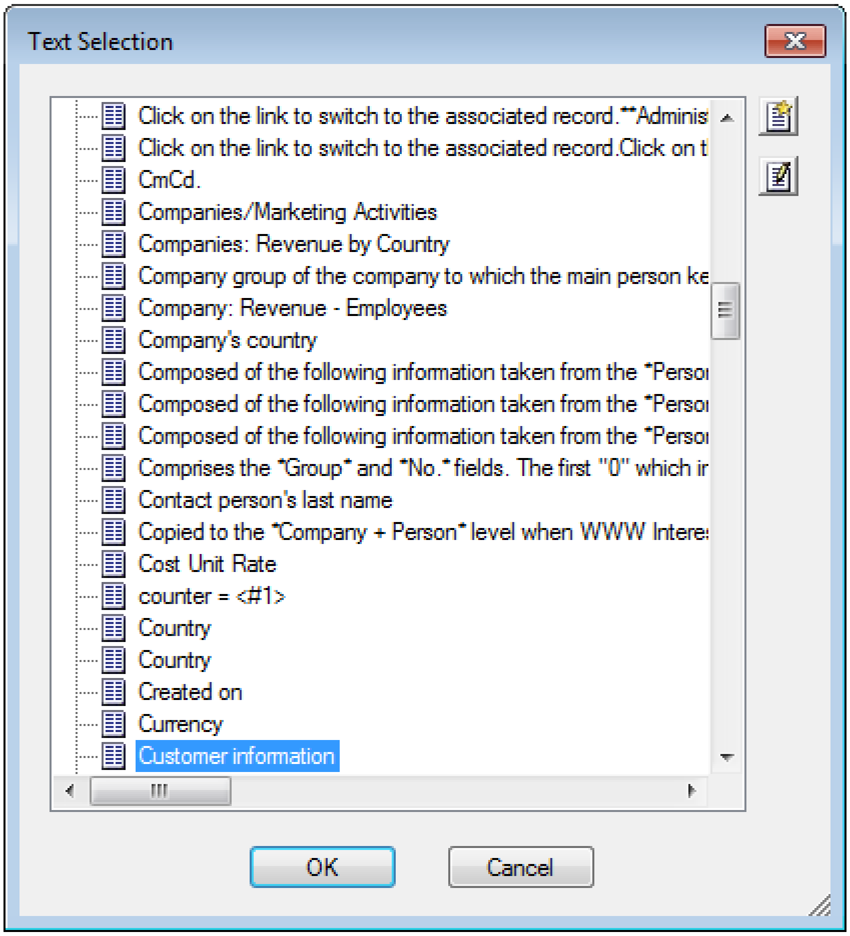
   The **Edit Text** dialog is displayed:



2. Enter the text in the desired languages. Use Ctlr+Enter to enter line breaks.

   Alternatively, click on  (**Load**) to load an existing text in the **Text** info area, see Text in the *CRM.core Administrator Guide.*

   The **Text Selection** dialog is then displayed:



3. Click **OK**.

The text is stored in the **Text** info area. The record containing the multilingual text only contains a link to the text record. This link is updated or saved when editing the text. If you edit an existing multi-language text, the modification details (**Updated by ID**, **Updated on** etc.) of the record containing the text is **not** updated (as the reference is unchanged).

Date Fields

Date fields are pre-configured by the system.

The standard format used by Aurea.CRM win to enter dates is the conventional DD.MM.YYYY format. Fields in which only the month and year are entered usually have the format MM/YYYY.

Entering the Date Directly

To change the date:

1. If the check box to the left of the date is disabled, enable it to enter edit mode.

   If you click in an empty date field, the current date is entered automatically and the date is grayed out. Enable the check box to enter the current date.

2. Click on the day, month or year digit to edit the date. Alternatively, use the arrows to the right of the date to increase/decrease the date by one unit.

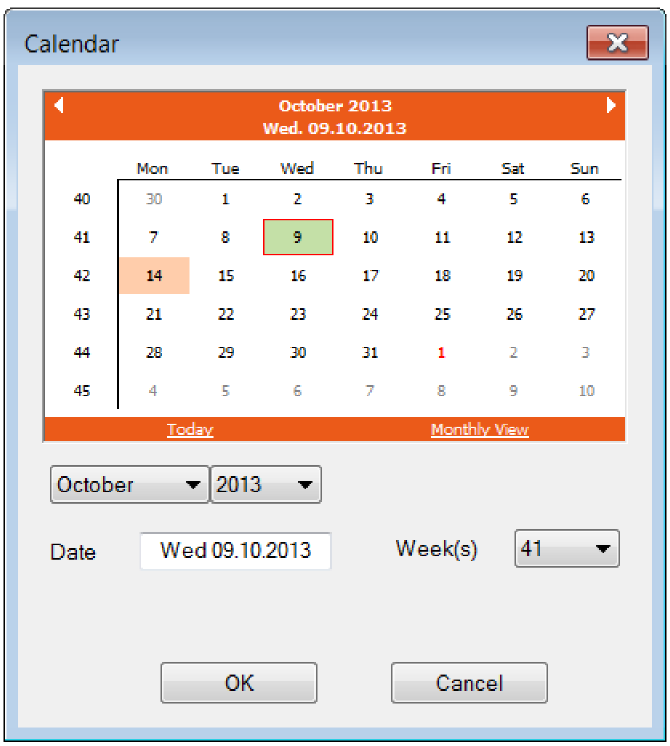
   If you disable the check box, the date is grayed out and disappears as soon as you click in another field.

Note: If you do not want to use this input method, your administrator can determine that dates are entered as with normal fields, see Masks Tab (**Use date navigator** option) in the *Aurea.CRM win Administrator Guide*.

Calendar

You can use the calendar to enter dates in Aurea.CRM win.

1. Click the calendar icon  to the right of the date field to open the calendar.



   The current date is highlighted in turquoise and the date currently entered appears in green with a red border.

2. Select the desired date and confirm with **OK**.

In some cases, you may want to enter a time frame (e.g. for distributing appointments in the calendar, see Distributing Appointments), in which case the **Period** group field is displayed in the calendar. Instead of the **Date** field, the fields **From** and **To** are displayed. You can enter a time frame directly in the calendar by highlighting a period of time. Select the start of the time period, and click on the end of the time period whilst pressing shift.

Time Fields

Learn about the Time fields field type.

To change the time:

1. If the check box to the left of the time is disabled, enable it to enter edit mode.

   If you click on an empty time field, the current time appears automatically and is grayed out. Enable the check box to insert the current time.

2. Click on the hour, minute or second digit to edit the time. Alternatively, use the arrows to the right of the time to increase/decrease the time by one unit.

If you disable the check box (i.e. you want to delete the entry), the time is grayed out and disappears altogether as soon as you click in a different field.

Note: If you do not want to use this input method, your administrator can determine that dates are entered as with normal fields, see Masks Tab (**Use date navigator** option) in the *Aurea.CRM win Administrator Guide*.

Catalogs

Catalogs are lists of predefined values you can select when entering data.

Catalogs prevent incorrect entries or the use of different terms for one and the same value.

When in mask view, catalog fields can be displayed with a blue border. These settings are defined by your administrator. For catalogs that are assigned icons, your administrator can determine whether this icon is visible in the field, to the right of the field, or not at all, see Desktop in the *Aurea.CRM win Administrator Guide*.

Aurea.CRM features different types of catalogs:

- Fixed catalogs
- Variable catalogs

Catalogs can be linked to other catalogs hierarchically. The **Product** catalog field is hierarchically linked with the **Product Group** catalog field; i.e. the values in the **Product** field are dependent on the value selected in the **Product Group** field. One dependent product catalog is available per product group.

Fixed Catalogs

Fixed catalogs are catalogs whose entries have been predefined by Aurea. Fixed catalogs are used whenever it makes sense to standardize entries beyond the scope of a single company, or whenever standard evaluations are linked to catalog entries. Fixed catalog values can only be changed by your administrator, see Maintenance Module in the *CRM.core Administrator Guide*.

Example: Aurea.CRM offers you a choice of the following activity types: Telephone, Visit, Letter, Event, Fax, E-mail, Info, Internet.

Variable Catalogs

Variable catalogs contain entries defined by your company. These catalogs are set up by your administrator and can be edited and expanded as required.

Example: The **Country** catalog lists all countries which are available when adding and editing companies.

In contrast to fixed catalogs, variable catalogs can support multiple tenants, i.e. entries can be assigned to specific users for viewing and editing. A catalog can be set up so that the tenant number for the catalog entry is also displayed.

Your administrator is responsible for determining which users are allowed to add new catalog entries to the database. Catalog values can only be edited or deleted in the **Maintenance** module.

Using Catalogs

To open a catalog:

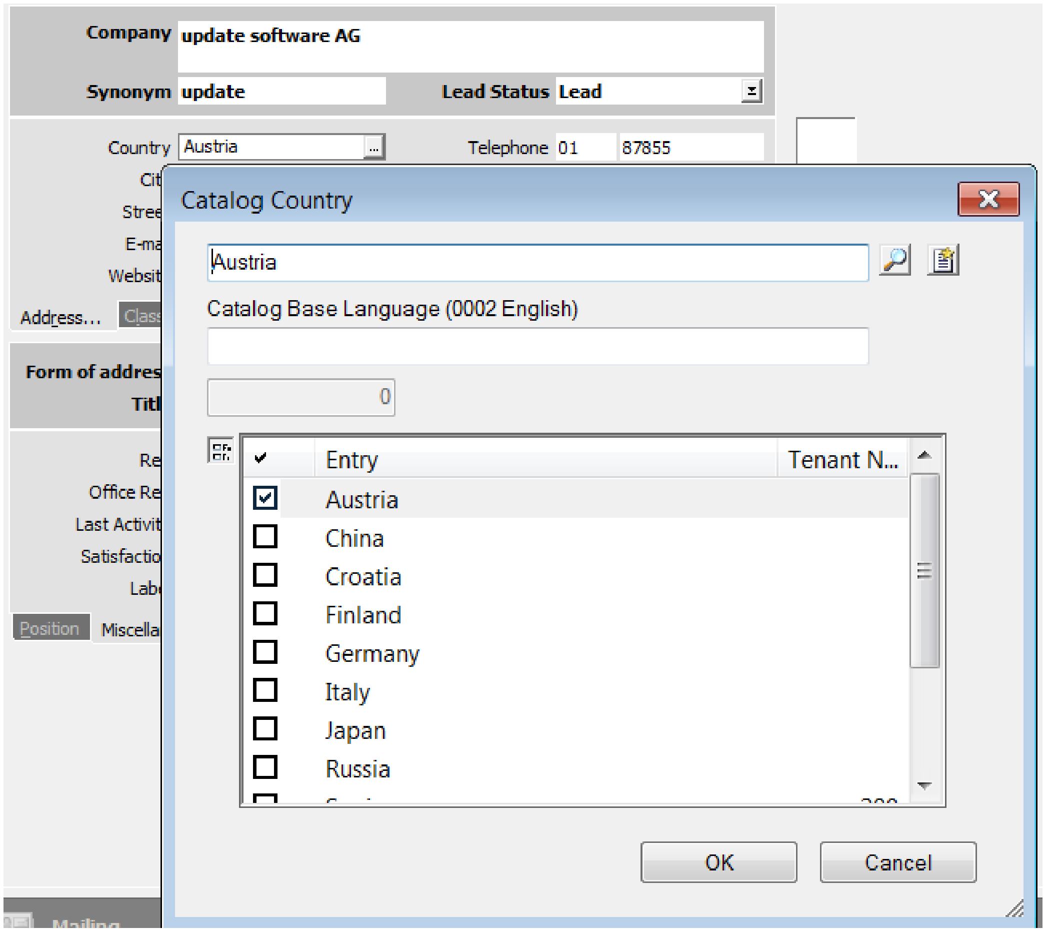
- Double-click a catalog field.
- Click on the icon in a catalog field (, ,). Depending on your configuration, either a dialog box or drop-down list is displayed.
- If you are able to add entries to a variable catalog configured as a drop-down list, click on to add new values.
- Enter all or part of the value in a (variable) catalog field and press enter.

To select or add a catalog value:

If the catalog is a fixed catalog or a drop-down list, select the desired entry.

When accessing the dialog box for variable catalogs, you have the following options:

1. The dialog box containing the catalogs values is displayed. If you entered a value in the catalog field, this value is entered in the search field at the top. The catalog entry that is (alphabetically) closest to the search value you entered is selected.



2. Select the desired entry, and confirm with **OK**. You can navigate within the catalog using the following methods:
   - Enter the desired catalog value in the search field at the top and click on to search for the entry in the catalog.
   - Click in the list and enter the first few letters of the desired entry.
3. If the desired entry is not in the catalog, and you are allowed to add new catalog values, enter the complete value.

   Note: If you enter the value in a language other than the catalog base language, you need to enter an appropriate translation in the **Catalog Base Language** field.

4. Click on (**New**) to add the value to the catalog.

The dialog box is closed and the selected entry is entered in the catalog field.

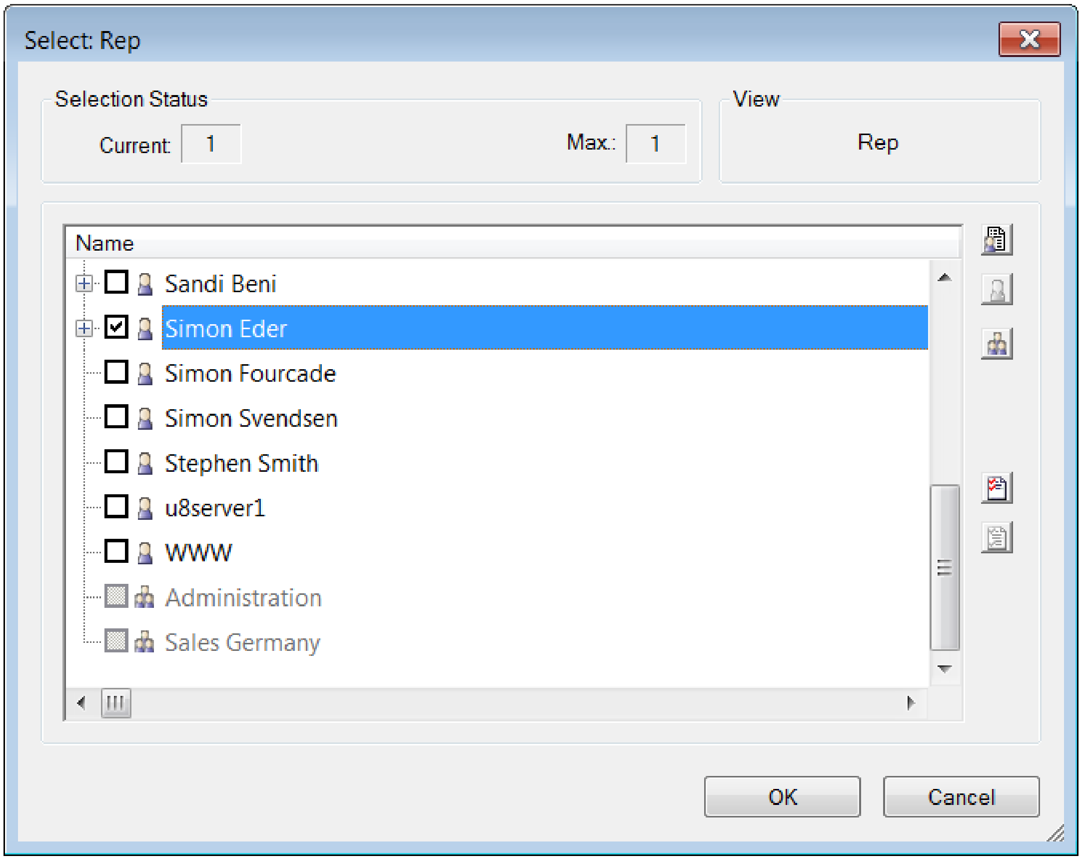
If the catalog supports tenants, the tenant number is automatically entered and displayed.

Note: Your administrator can display the catalog entry numbers by clicking on (**Number**).

Rep List

Learn about Rep List field type.

Click on the rep icon () next to a rep field to open the rep list.



The rep list provides the following functions:

Cur-rent	Displays the number of selected reps.
Max.	Displays the maximum number of reps that may be selected. You can only select one rep in the **Rep** field in the **Activity** info area, whereas you can select up to 20 reps in the **Participant** field.
	**List** (Alt + L) Displays a list of available reps without group allocation.

<table>
<tr><td></td><td>

Rep (Alt + R)

Displays the reps including the groups they have been allocated to. Click on the "+" next to a rep to see the groups.

A rep can be allocated to several groups.

If you open the rep list from a group field, then you cannot select individual reps, only groups.

</td></tr>
<tr><td></td><td>

Groups (Alt+G)

Displays a list of groups. Click on the "+" to expand the list and display the reps allocated to the group.

If you open the rep list from a rep field, then you cannot select groups, only individual reps.

</td></tr>
<tr><td></td><td>

Resources (Alt+R)

Only available if the rep list is accessed from the **Participants** field (**Activity** and **Tasks** info areas), see Adding Reps and Resources to an Activity/Task.

</td></tr>
<tr><td></td><td>

Show Selected (Alt+W)

Displays only the selected reps.

</td></tr>
<tr><td></td><td>

Show All (Alt+A)

Displays all reps again.

</td></tr>
<tr><td></td><td>

Delete Current Selection (Alt+S)

This button is only available if more than one rep can be selected from the rep list.

</td></tr>
<tr><td></td><td>

Delete Entire Selection (Alt+C)

This button is only available if more than one rep has been selected from the list.

</td></tr>
</table>

Additional information on reps and the configuration of the rep list see Reps in the *CRM.core Administrator Guide* and Misc. Tab (**Rep Catalog** options) in the *Aurea.CRM win Administrator Guide*.

Link fields

Use link fields to establish links to other records.

To do so, click on (**Search**) next to the field and search for the desired record.

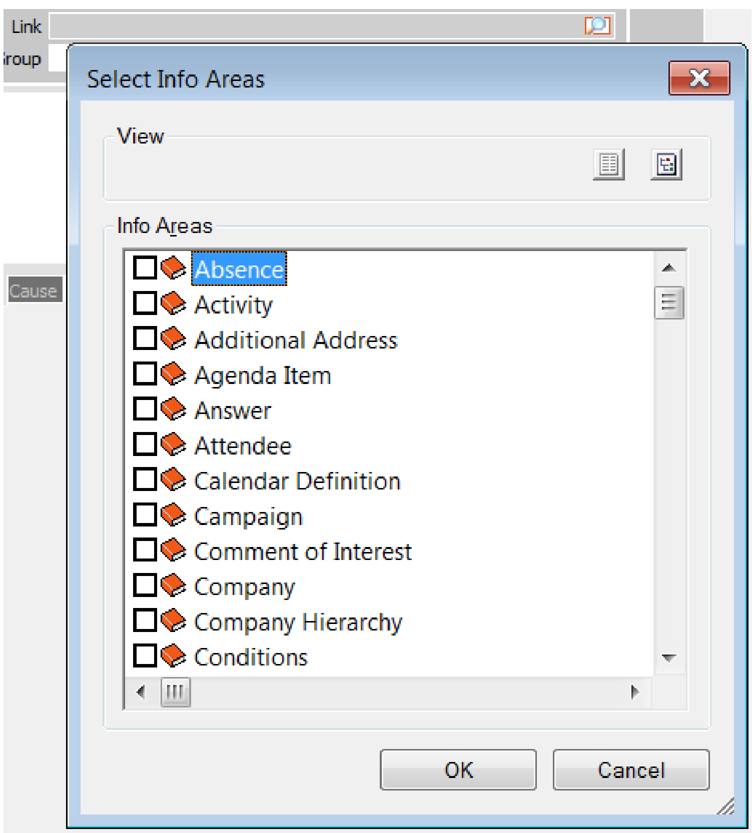
In many cases, fields from the target record are transferred once a link is established (e.g. station number, serial number).

To delete a link, right-click on (**Search**) and select **Remove Link**.

Note: When deleting a link to a company, the link to the corresponding person in company is also automatically removed.

Generic Links

Your administrator can determine which info areas are available as targets for generic links. Click on (**Search**) to select the target info area.



Telephone Fields

Learn about the telephone field type.

If a telephone connection is installed via CRM.phone or another application, click on the telephone icon in the masks to call the number entered in the field, see CRM.phone User Manual.

Mandatory Fields

This topic explains Mandatory field types.

Your administrator can define any number of mandatory fields for each info area and highlight them with a border, "*" or "!", see Defining Rights at the Field Level in the *CRM.core Administrator Guide* and Desktop in the *Aurea.CRM win Administrator Guide*.

If you overlook a mandatory field when filling out the data, Aurea.CRM win prompts you to complete the field when you attempt to save the record.

System Fields

System fields are fields that are used to store who edited, created or communicated a record, when and on which station.

System fields have field numbers starting from 4,000.

Select **View > All Mask Fields** and click on (**Load all fields**) to display all system fields.

Your administrator can prevent access to system fields, see *Defining Rights at the Field Level* in the CRM.core Administrator Guide.

Configuring the Display

Learn how to configure the display.

You can save and load the integrated view (including window sizes, conditions, sort criteria etc.) by selecting **View > Save as Dashboard** from the menu, see Dashboards on page 266.

Select **Extras > Load Desktop** from the menu to load a desktop previously designed by your administrator. Desktops include the complete Aurea.CRM win user interface settings; icon bar settings, buttons, level settings, menus etc., see **Desktop** in the Aurea.CRM win Administrator Guide. Desktops can be assigned to stations, groups and individual users.

If you have the appropriate rights, select **View > Desktop Properties** from the menu to make personal settings that apply to Aurea.CRM win's interface:

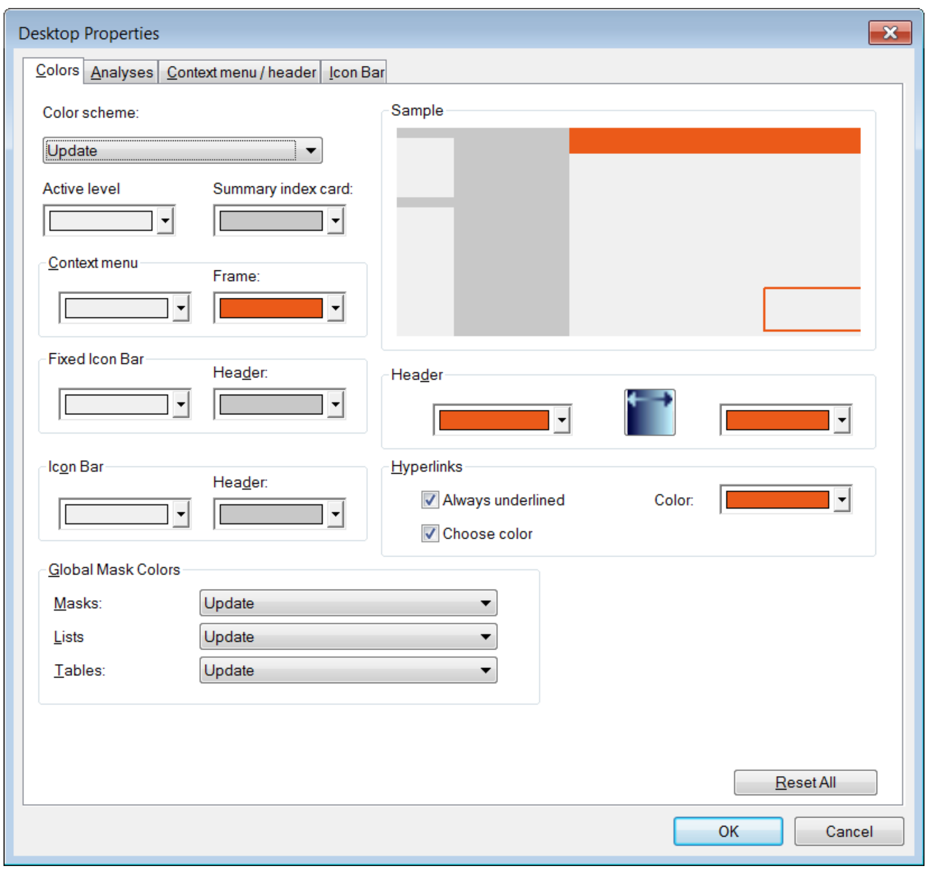
- Colors, see Colors in Aurea.CRM win on page 261
- Analyses, see Colors for Bar and Pie Charts on page 263
- Context menu/header, see Context menu or header on page 264
- Icon bar, see Icon Bar on page 265

These personal settings take precedence over the desktop settings defined by your administrator; i.e. they are reloaded every time you log on to Aurea.CRM win.

The **Reset All** button is available in all of the tabs in the **Desktop Properties** dialog box. Click on the button to reset the settings to those specified by your administrator or, if no desktop has been defined, to revert to the standard Aurea.CRM win settings.

Colors in Aurea.CRM win

The **Colors** tab allows you to change Aurea.CRM win's appearance.



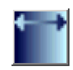
The following options are available:

- **Color scheme:** Select a color scheme from the drop-down list.

You cannot save a new color scheme; however any changes you make to the colors are retained when you click the **OK** button.

- **Active level:** Background color for the current level. This option can be especially useful when working with the integrated view.

This setting only takes effect if your administrator has determined that the active level is displayed in a different color, see **Desktop** in the Aurea.CRM win Administrator Guide.

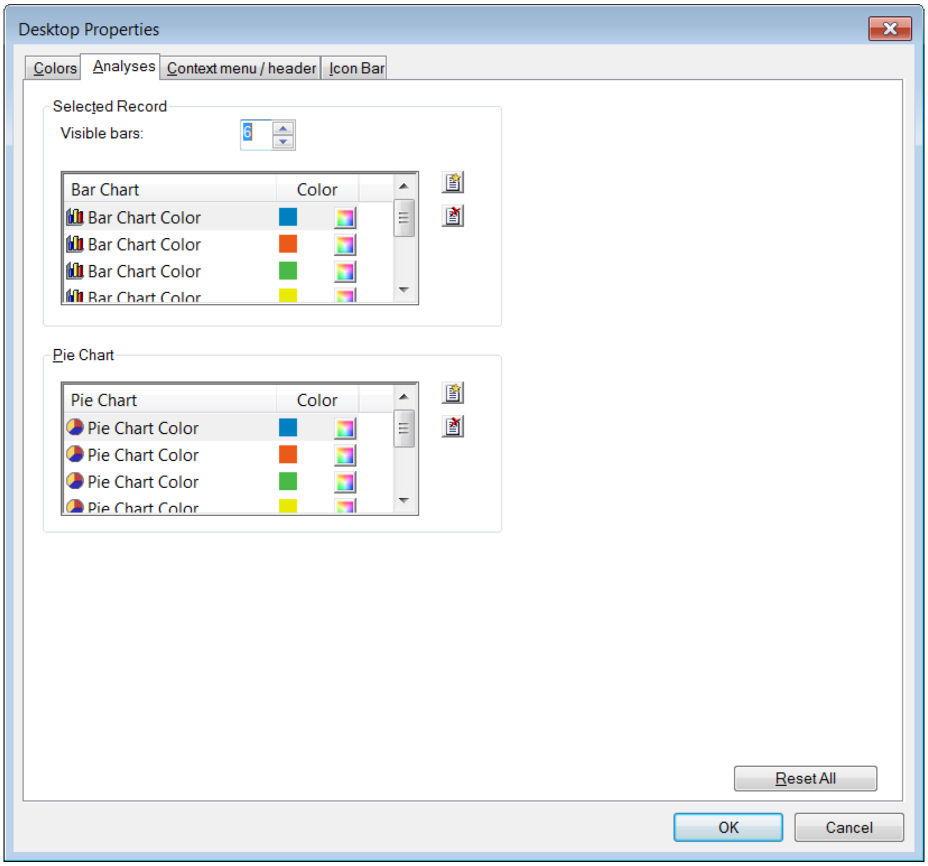
- **Summary index card:** Background color of the summary index cards. The icon of the currently selected info area in the icon bar is also displayed in this color.
- **Context menu:** Background color of the context menu.
- **Frame:** Color of the context menu's frame. Used to display all-day appointments in the calendar, see All-day Appointments.
- **Fixed Icon Bar:** Background color for the fixed icon bar.
- **Icon Bar:** Color for the text displayed along with the icons in the variable icon bar.
- **Sample:** The current changes to the color scheme are reflected here.
- **Header:** The 2 colors in the gradient in the level header. Use the  button to switch between a horizontal and a vertical gradient.
- **Hyperlinks:**
  - **Always underlined:** All hyperlinks (e-mail addresses, URLs and links to other info areas) appear underlined.
  - **Choose color:** Enable this check box to be able to select a color from the **Color** drop-down list and change the color of hyperlinks. When the check box is disabled, the **Color** field cannot be edited and hyperlinks are not displayed in a different color.
- **Global Mask Colors:** You can select various color schemes defined by your administrator for masks, lists and tables using the drop-down lists, see Skins Tab in the *Aurea.CRM win Administrator Guide*.

If no formats have been defined, then the **Masks, Lists** and **Tables** drop-down lists allow you to choose from Aurea.CRM win's standard color schemes.

Colors for Bar and Pie Charts

The **Analyses** tab allows you to determine the number of visible bars and the colors used to display bar and pie charts.

The settings apply to all analyses (e.g. sales funnel) as well as to the **Analysis** module, see Analysis Module in the *Aurea.CRM win Administrator Guide.*



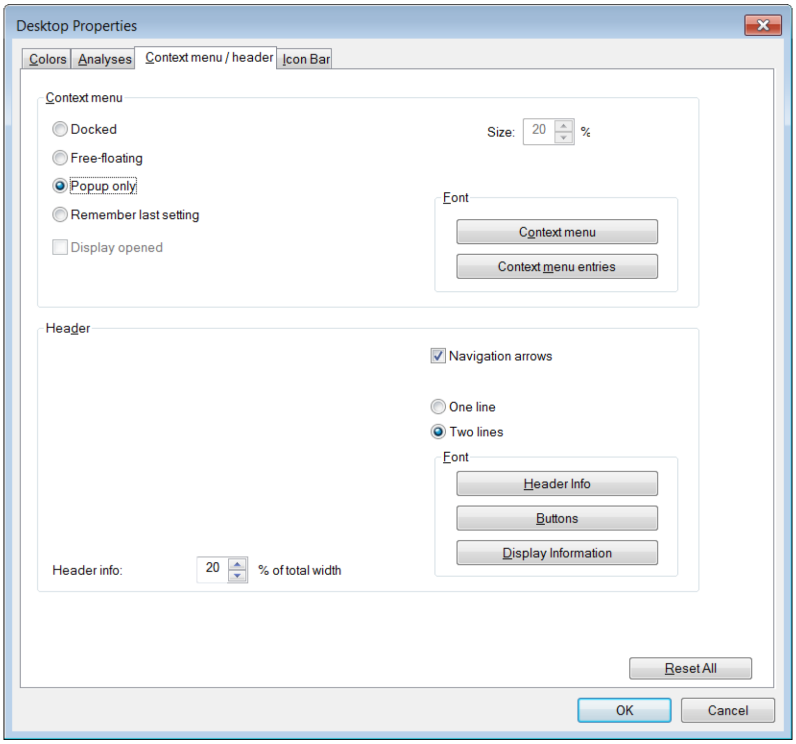
The following options are available:

- **Visible bars:** Enter the number of bars you wish to display in the bar chart. You can choose to display up to 10 bars. Only one pie chart is ever displayed.
- Use the **New** button ( ) to define a new color for the bar or pie chart. If you have already defined 10 colors, the button is grayed out, i.e. you cannot define any more colors.
- Use the **Delete** button ( ) to remove the selected color from the list.
- Use the **Color** button ( ) to change a previously defined color.

Context menu or header

This tab allows you to make settings that apply to the context menu and to the level header.

For further details, see Context Menu on page 142 and Level Header on page 137.



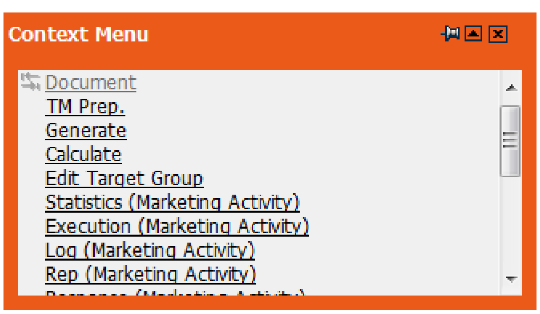
The following options are available:

Context Menu (pane)

- **Docked:** Select this radio button if you wish the context menu to dock on the right hand side of the mask when Aurea.CRM win is started.

The context menu can be positioned freely by dragging it to the desired position. If you switch to another info area, and then return to the previous level, the context menu continues to be displayed at its last position.

Free-floating: Select this radio button if you wish the context menu to appear at the top left of the mask (beneath the level header) when Aurea.CRM win is started.



The context menu can be positioned freely by dragging it to the desired position. If you switch to another info area, and then return to the previous level, the context menu continues to be displayed at its last position.

- **Popup only:** Select this radio button if you only wish to access the context menu using the right mouse button within the mask, or using the **Context Menu** button in the command bar.

Even if you have chosen a different option than **Popup Only** you can still access the popup menu by right-clicking on either the mask or list.

- **Remember last setting:** Enable this radio button if you wish the context menu to be displayed in the same position it is in when Aurea.CRM win is last closed.
- **Display opened:** Enable this check box if you wish the context menu to be open when Aurea.CRM win starts.
- **Size:** Size of the context menu. The maximum value is 40% of the size of the level's window.
- **Font:** Click on the **Context menu** button to set the font, style, size, color etc of the context menu's header. Click on the **Context menu entries** button to set the font, style, size, color etc. of the context menu's entries.

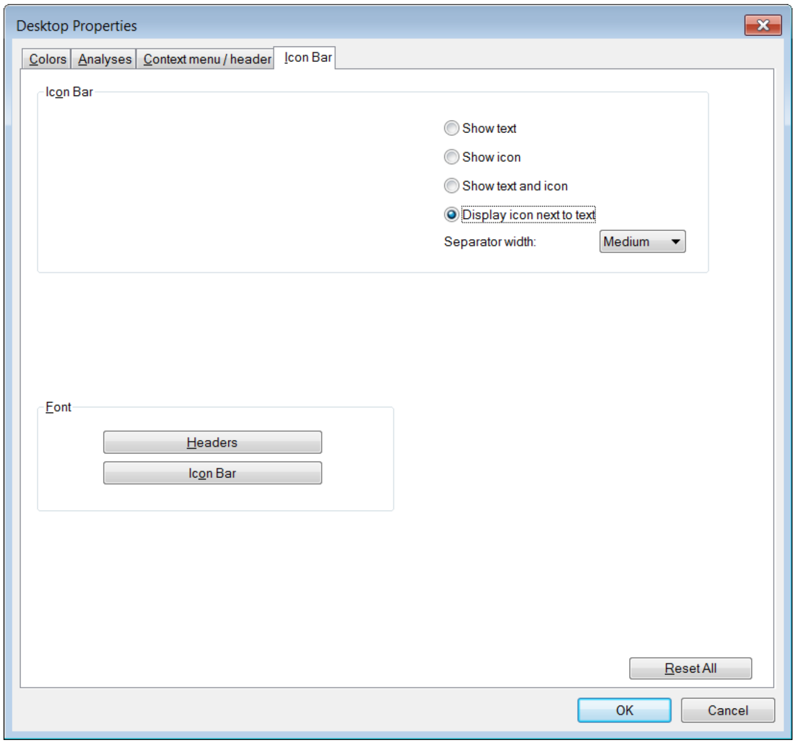
Header (pane)

- **Header info:** You can define what percentage of the entire width of the level header is taken up by the level header info. Should the text be longer than the defined width, the excess text is cut off, and replaced with "..." instead.
- **Navigation arrows:** Enable this check box to display the navigation arrows in the function bar. You may not require these buttons, as you can navigate using the keyboard. However, they are **always** displayed in the summary index card.
- **One line:** The level header info is displayed in a single line.
- **Two lines:** The level header info is displayed over two lines.
- **Font:** You can determine the font, size, color, etc. of the level header info, command bar and view mode bar from here.

Icon Bar

This tab is used to make settings that apply to the icon bar.

For further details, see Icon Bar on page 265.



The following options are available:

- **Show text:** Only the names of the levels in the icon bar are displayed (left-aligned).
- **Show icon:** Select this radio button if you only wish to display icons (without text) in the icon bar.
- **Show text and icon:** Select this radio button if you wish to display both the icon and the name of a level in the icon bar. The text is centered.
- **Display icon next to text:** The text is displayed to the right of the icon.
- **Separator width:** You can determine how thick the separators between the icons are.
- **Font:** You can change the font, size, color, etc. of the headers (menu group titles) as well as the info area names in the icon bar from here.

Dashboards

Learn about the CRM.win display dashboard.

When saving a dashboard the following settings are saved:

- The number and position of the levels in the integrated view (mask and list views can be combined), see Integrated View on page 153.
- The conditions and sort order defined for the info areas in the integrated view, see Conditions on page 54 and Sorting Records on page 52.
- Whether the levels in the integrated view are displayed using the **Company-related** or **Person-related** setting, see Displaying Records on page 29.

Info areas opened by a workflow. The following restrictions apply:

- The first info area in the dashboard may not be a workflow (a message is displayed upon saving the dashboard if this is the case).
- Only the workflow format is saved, not the positions of the info areas opened by the workflow.
- If a workflow has already been added using a separate view, adding the workflow a second time causes the workflow to be opened in the integrated view.

Further information on workflows can be found in the Aurea.CRM automator manual.

Standard Dashboards

In the standard version of Aurea.CRM win, dashboards have been preconfigured for the following info areas:

- BTB: **Company, Marketing Activity, Property, Opportunity, Item Master, Offer, Order, Installed Base, Expenses**
- FS: **Company, Campaign, Consultation, Securities Account, Expenses**
- OTC: **Company, Marketing Activity, Expenses, Item Master, Stock Control, Order, POS, Refunding, Installed Base**

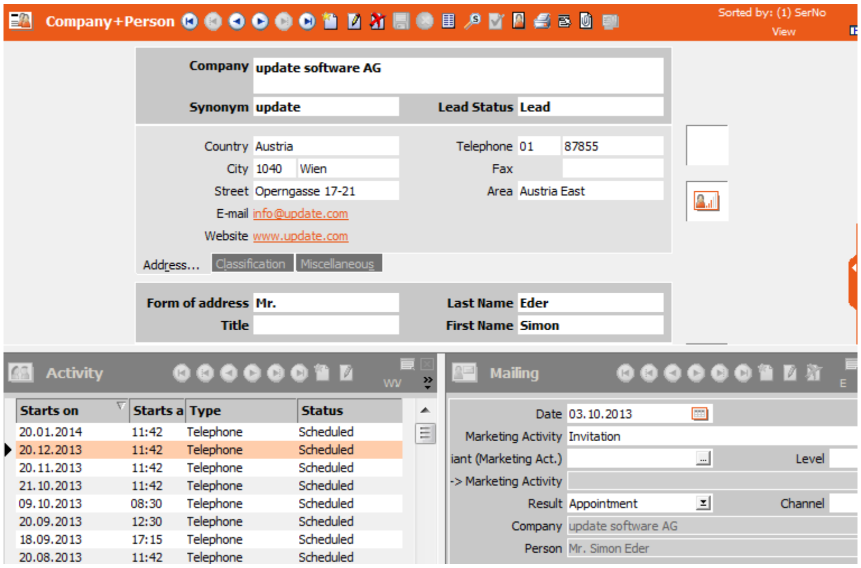
These standard dashboards require a resolution of at least 1024 x 768 and are only active until your administrator defines a desktop. To continue using them, the administrator must integrate them in a desktop, see Desktop in the *Aurea.CRM win Administrator Guide*.

Defining a Dashboard

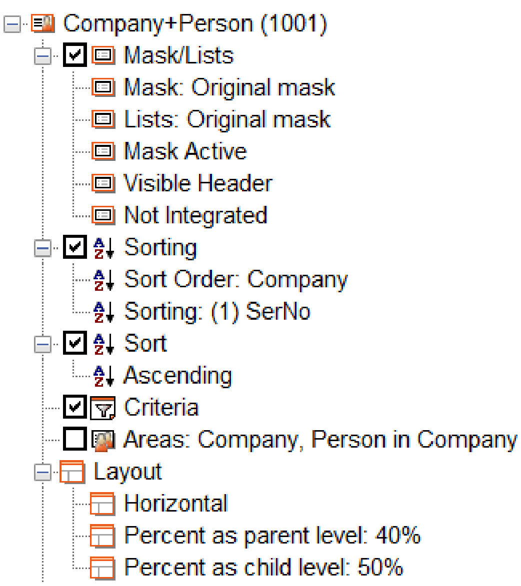
To define a dashboard:

1. Configure the integrated view as desired (mask, lists, sort order etc.), see Integrated View on page 153.

   Example: The **Company** info area, as well as the dependent info areas **Mailing** and **Activity**, should be included in a single integrated view. Activities are displayed in list view. Conditions to be applied: **Mailing:** Marketing Activity = Invitation, **Activity:** Type = Telephone. Sort criteria: Activity by date (Descending).



2. Click on the parent level (**Company+Person** in this example). This specifies that **Company+Person** as well as the dependent info areas are saved in the dashboard.
3. Select **View** > **Save as Dashboard** from the menu. A preview dialog box appears, displaying the selected options.



Click on the + or - signs to show or hide related information.

The layout of the integrated view including all levels is displayed to the right window.

4. You can disable options by enabling the corresponding check box:
   - **Mask/Lists:** Displays the currently loaded mask or list.
   - **Visible Header:** The header is displayed for the level.
   - **Not Integrated:** Information on whether the mask is displayed in full or integrated mode is only available for the parent level.
   - **Sorting:** Displays the currently active sort criterion, in this case the sort order is **Company** and the records are sorted by **SerNo**.

Note: If a dashboard is loaded with an active sort whilst a selection is open, the selection is closed automatically. If you wish the selection to remain open, you need to disable the **Sorting** option.

- Sort: The fields according to which the records are sorted and the sort order (ascending/descending) are displayed here.
- Criteria: Displays the conditions defined and whether they are active.
- Areas (e.g. Company, Person in Company): The current view (e.g. just the company or companies and persons in company) is saved in the dashboard.
- Layout: Displays the size of the level as a percentage of the total available area.

5. Click the **OK** button after you have checked that the layout is correct and enter a name for the format. The dialog box used to save formats is opened, see Saving, Loading and Deleting Formats. Enter a name for the dashboard and confirm with **OK**.

Note: The names given to dashboard formats should be unique across all stations; otherwise there may be communication difficulties. If you wish to define dashboards on several stations, it is advisable to include the name or number of the respective station as part of the dashboard name, see Station in the *Aurea.CRM win Administrator Guide*.

Loading a Dashboard

To load a dashboard:

1. Switch to the info area you want to load a dashboard for.
2. Select **View > Load Dashboard**.The dialog box for loading formats is displayed, see Saving, Loading and Deleting Formats.
3. Select the desired dashboard and confirm with **OK**. The dashboard is loaded.

The following dashboards are available in the **Load** dialog box:

- All dashboards where the top-most level is independent e.g. **Marketing Activity**, **Item master**, **Calendar** etc.
- Dashboards that have been saved from the currently active level or from a parent of the current level.

Example: A dashboard contains the **Order** and **Order Item** levels. When loading, the dashboards for the **Company**+**Person** level (the parent level) and those saved from the **Order** and **Order Item** levels are available.

Following dashboards are **not** displayed:

- Dashboards saved from other dependent levels are unavailable.

Example: In the **Company+Person** level**,** dashboards saved from the **Order** or **Order Item** levels are unavailable.

Note: If you have defined variable conditions (e.g. date of birth) these conditions can be changed when the dashboard is loaded, see Variable Conditions With User Input on page 68.

Accessing Dashboards in the Icon Bar and Info Menu

You can also access dashboards using the icon bar or the **Info** menu, if your administrator has configured this for you, see Desktop in the *Aurea.CRM win Administrator Guide*.

Your administrator can also configure Aurea.CRM win so that dashboards can be opened from the context menu, see Context Menu on page 142.

Analyses

You can display data as bar charts, pie charts, quadrants or on a time axis from within Aurea.CRM win's main module.

By default, the graphics from the company ComponentArt are used to display analyses. However, if you start Aurea.CRM win over the network or have not installed .NET Framework 4.5, charts are displayed using Aurea's graphics. Your administrator can also define that analyses are always displayed using the Aurea graphics, see Configuration Info Area (Analyses category, Use ComponentArt graphics option) in the *CRM.core Administrator Guide.*

The colors in the analyses are configured to match the Aurea.CRM win default color schemes (ComponentArt bar charts only use one color per level). If you decide to configure your own color scheme, you should configure the colors used in the analyses accordingly. Select **View** > **Desktop Properties** from the menu and open the Analyses tab.

Simple Analyses

Learn how to define simple analyses.

To define a simple analysis:

1. Define the transfer fields in the analysis, see Defining Transfer Fields on page 271.
2. Define the analysis, see Defining the Analysis on page 272.
3. Run the analysis and edit the display and any other options, see Running the Analysis on page 273.

Note: You can save analyses as dashboards by selecting **View > Save as Dashboard** from the menu. The analysis is saved including all current options. Dashboards can be integrated within desktops, allowing you to access the analysis using a button, for example.

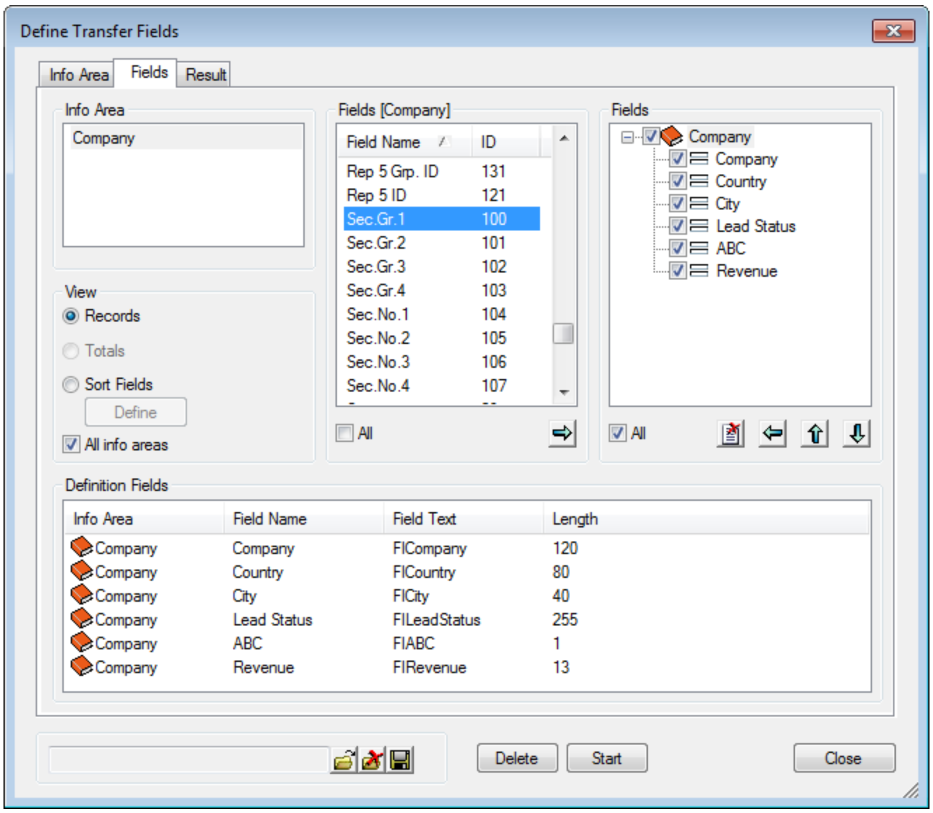
Defining Transfer Fields

Learn how to define transfer fields with an example.

In the following examples, the number of companies per country should be counted.

To define the transfer fields:

1. Select **Extras > Define Transfer Fields** from the menu, see Transfer Fields on page 79.
2. Select **Company** from the list of info areas in the **Info Area** tab.
3. Open the **Fields** tab.
4. Select the **Company, Country, City, Lead Status, ABC** and **Revenue** fields.



5. Save the transfer fields format.

If you change the transfer fields format used by the analysis, you may need to remove analysis units or aggregations to keep the analysis and transfer fields consistent.

Conditions and settings in the transfer fields format are tested for all dependent info areas. They are only applied to independent info areas, if the analysis is executed over the entire database.

Aggregations in the transfer fields format are not applied to the analysis. They are neither displayed nor can they be used as analysis units.

The sort order is only transferred from the transfer fields to the analysis data if the **Entire database** option is selected when loading the analysis. The **Current Level** option applies the sort order used in the level the analysis is started from.

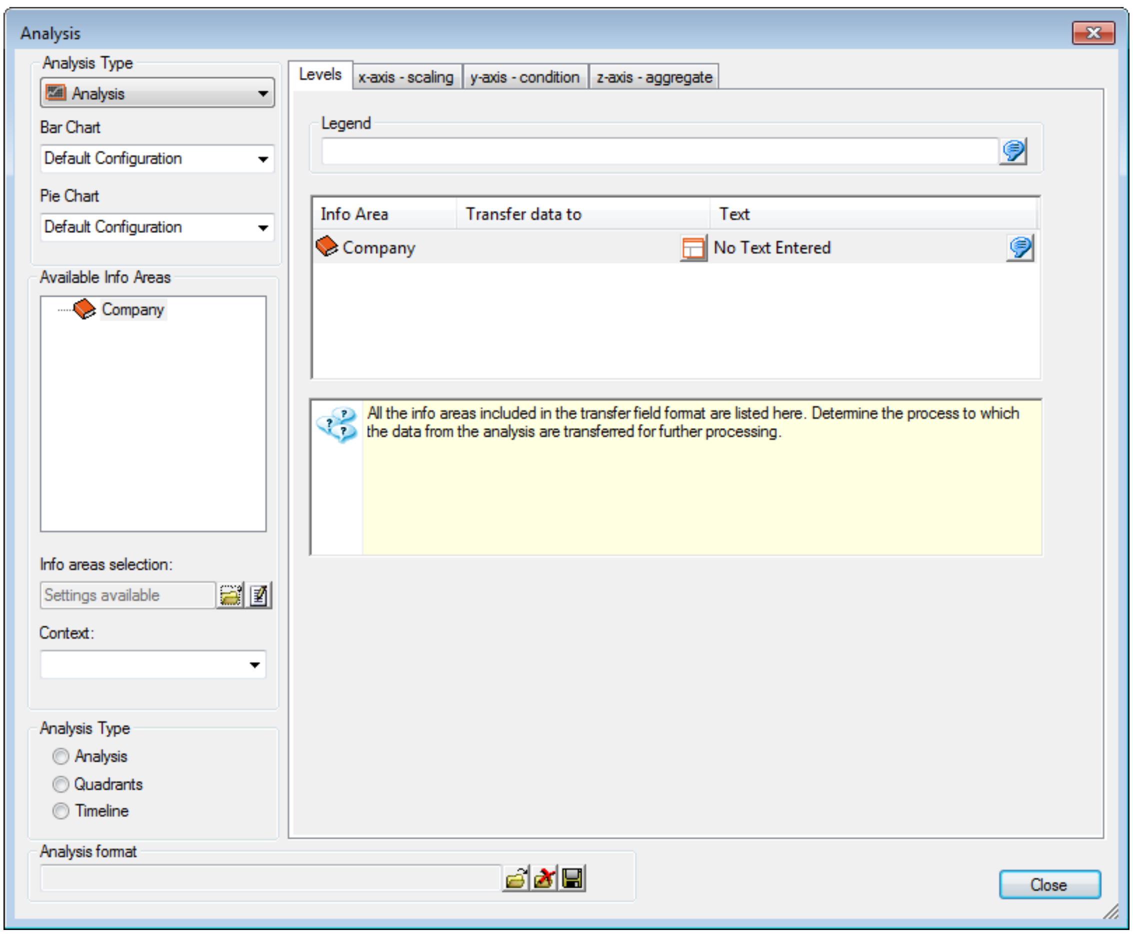
Defining the Analysis

Learn how to define an analysis.

To define an analysis:

1. Select **Extras > Define Analysis** from the menu.
2. If your administrator has defined several analysis layouts, you can select a layout under **Bar Chart** and **Pie Chart**, see Configuration Info Area (**Analyses** category, **Bar/Pie chart template** option)in the *CRM.core Administrator Guide.*

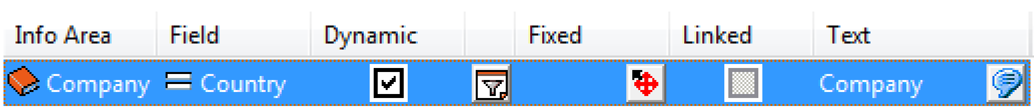
   If you do not select a layout, the defaults are used instead.
3. Select the transfer fields format you defined previously in the **Info Area Selection** field. The **Company** info area is listed in the **Levels** tab.



4. The following options are available from the **Context** drop-down menu:
   - **Current record:** Only the current record is included in the analysis.
   - **Current level:** The records in the current level are included in the analysis. Any active conditions applied to the level are also applied to the data in the analysis.
   - **Entire database:** All records are in the entire database are included in the analysis.

   Select **Entire database**.
5. Click on the icon to determine the level to be used (in this example **Company+Person**).
6. Switch to the **x-axis - scaling** tab to determine that companies are grouped according to country.
7. Click on the icon to add a new analysis unit.
8. Select a field (in this example **Country**).
9. Enter a **Legend** and **Text** to be displayed in the analysis.
10. Click **OK** in the **Unit** dialog box.

    This determines that each **Country** (i.e. each catalog entry) is treated as a separate unit.



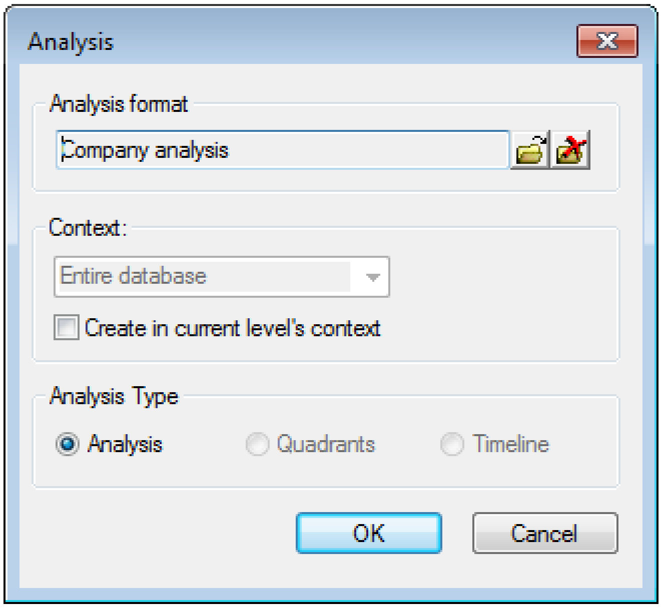
11. Save the analysis.

Running the Analysis

Learn how to run an analysis.

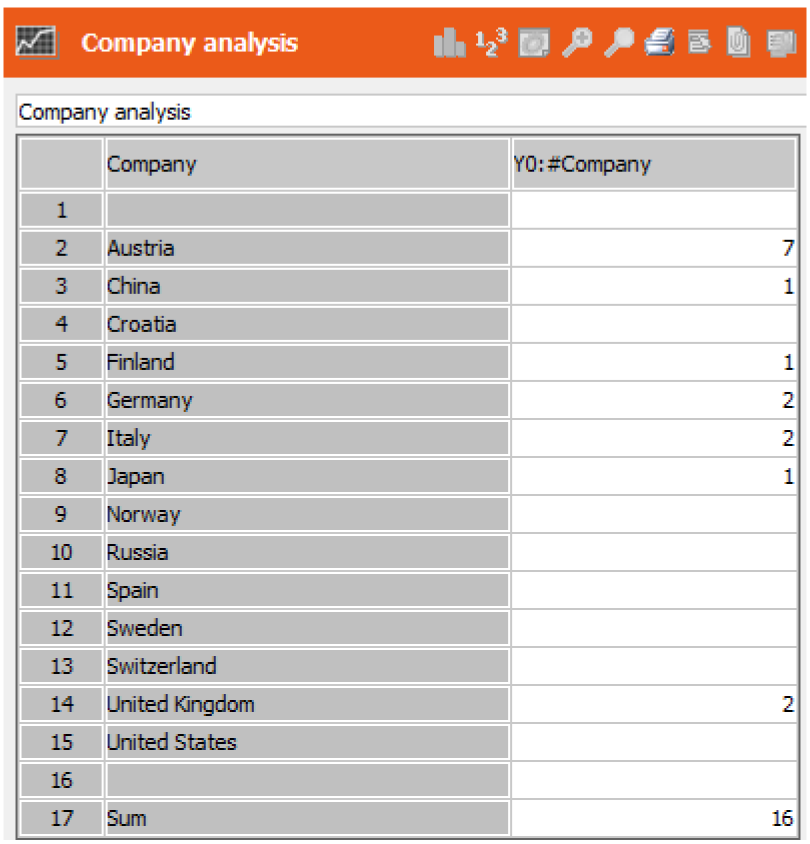
To run the analysis:

1. Select **File > Analysis** from the menu. Select the transfer format you defined earlier under **Analysis format**.



If you did not previously specify a context or analysis type, you can select one now.

2. Click **OK**.



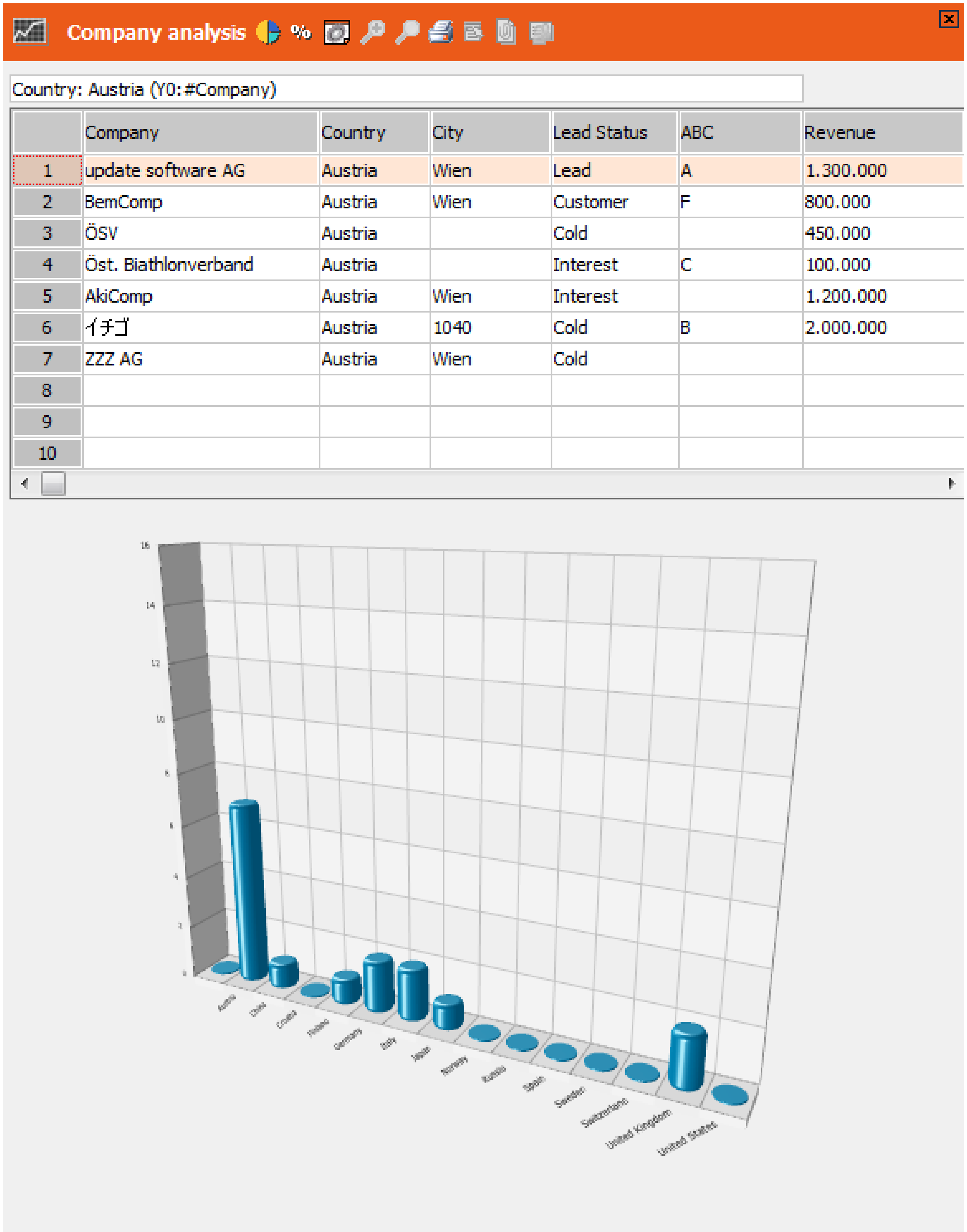
Company analysis

Company analysis

	Company	Y0:#Company
1		
2	Austria	7
3	China	1
4	Croatia	
5	Finland	1
6	Germany	2
7	Italy	2
8	Japan	1
9	Norway	
10	Russia	
11	Spain	
12	Sweden	
13	Switzerland	
14	United Kingdom	2
15	United States	
16		
17	Sum	16

The number of companies per country is displayed.

3. Use the context menu or buttons in the header to switch between the various display options:
   - **Table**: Hides and displays the table.
   - **Show details:** Displays all entries for the selected row.
   - **Bar Chart** () / **Pie Chart** ()Displays the results as a bar or pie chart.
   - **< X** (inactive), **X >** (inactive): These options are needed for more complex analyses, see Complex Analyses on page 284.
   - **Percent** (): Displays the results as percentages of the total.
   - **Show execution schedule**: Displays how data is read.
4. Click on a bar (or segment) to display a table containing the associated data (drill-through). The fields defined in the transfer field format are displayed in the table.



Click in the (empty) upper left cell to close the table.

5. Click (**Settings**) to configure the analysis, see Options.

6. Double-click on a company in the table to open and edit the company in the **Company+Person** level. The analysis remains open in the background. Click (**Back**) in the icon bar to return to the analysis.

7. Click (**Excel**) to transfer the data to Microsoft Excel. If you are displaying the details of one of the bars, only that data is transferred.

Note: You can determine that field types are transferred to Excel as well, see Configuration info area (**Analyses** category, **Transfer field type** option)in the *CRM.core Administrator Guide*.

Options

The options available depend on whether you are displaying a bar chart or pie chart:

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.

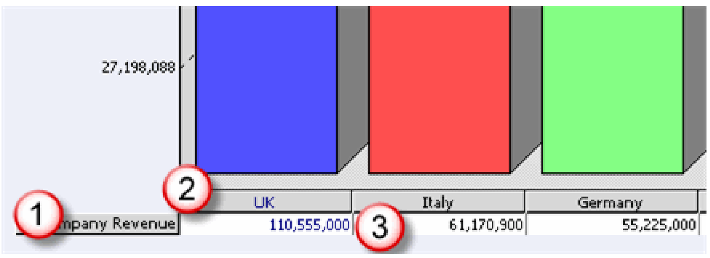
Bar (only bar charts)

- **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.

Aggregations

Learn how to aggregate numeric values in fields.

To aggregate numeric values in fields:

1. Switch to the **z-axis - aggregate** tab when defining the analysis.
2. Click to add a new aggregation and select the desired field, e.g. **Revenue**:

Info Area	Field	Type
Company	Revenue	Sum

If you now execute the analysis, the revenue per country is displayed instead of the number of companies.

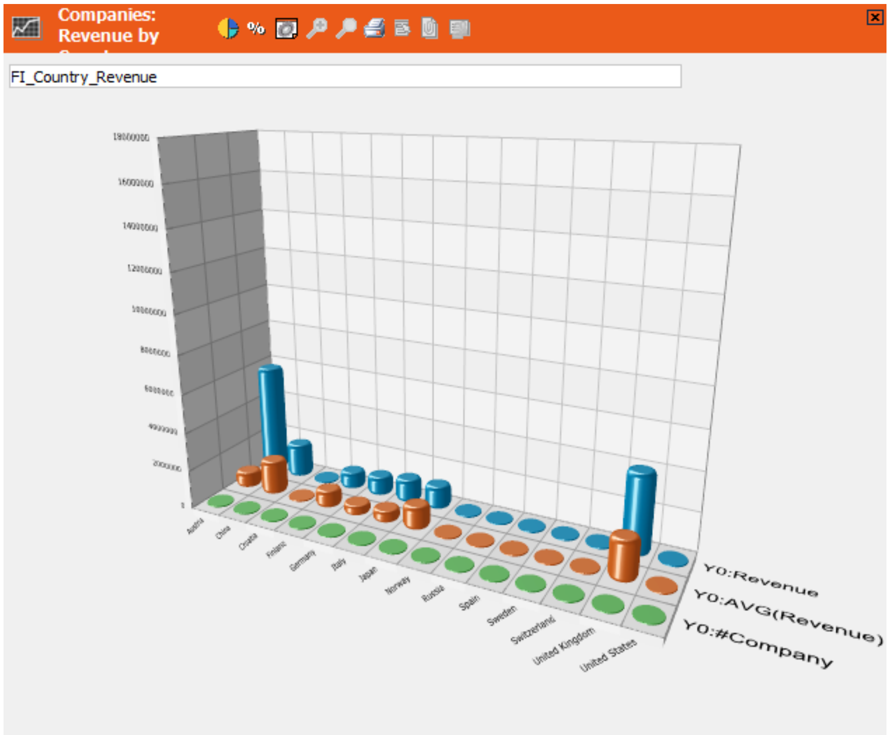
You can also choose to display the **Minimum, Maximum** and **Average** values, instead of the **Sum**.

Multiple Aggregations

You can display more than one aggregation at once, as in the following example:

Info Area	Field	Type
Company	Revenue	Sum
Company	Revenue	Average
Company	Number of records	Sum

The analysis now displays the total and average revenue per country as well as the number of country records:



If you are using Aurea's graphics, you use the **Split Levels** option under **Settings** to display a separate chart for each unit.

Analysis Units

Learn about fixed interval and dynamic scaling of data fields.

Fixed Intervals

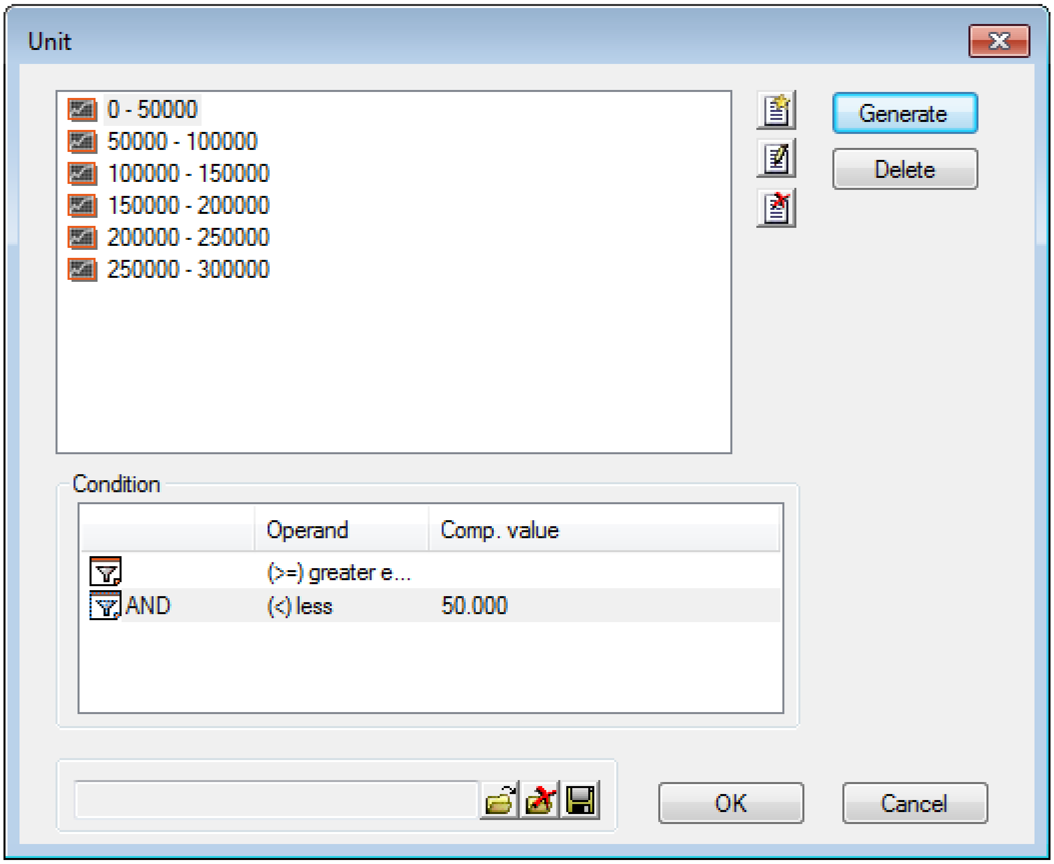
You can only use fixed intervals for numeric and alphanumeric fields.

To define fixed intervals:

1. Switch to the **x-axis - scaling** tab and define a unit; e.g. using a numeric field.

   The **Unit** dialog box is displayed
2. Click on the **Generate** button to generate a new scale and enter the values.
   - **From:** The start of the scale
   - **To:** The end of the scale
   - **Interval Size:** The size of the intervals in the scale
   - **Maximum:** The number of intervals
3. Click on **OK**.

   A scale similar to the following is generated:

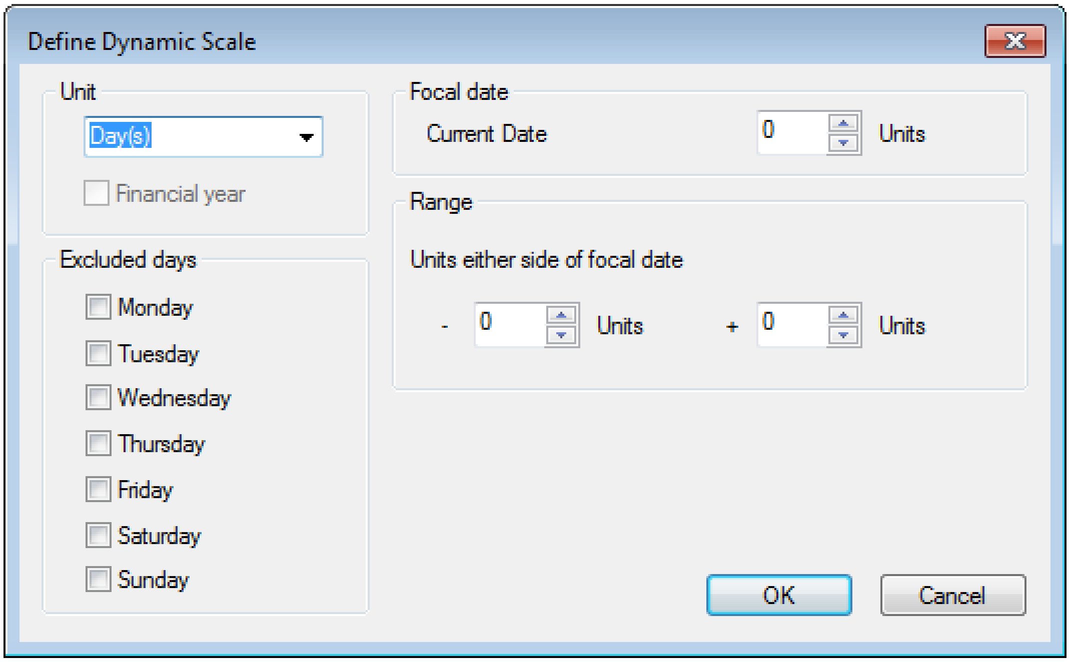


4. You can add, edit and remove intervals using the buttons (,  and ). Click on the **Delete** button to delete the entire scale.
5. Save the scale.
6. Click on **OK**.

For more details on fixed scaling, see Analysis Module in the *Aurea.CRM win Administrator Guide*.

Dynamic Scaling

Dynamic Scaling of Date Fields



You can scale dates dynamically using the following options:

- **Unit:** Determine how activities are grouped - per day, week, month, quarter, half-year or year.
- **Excluded days**: You can exclude certain week days, if have selected "Day" as the **Unit** (e.g. exclude weekends).
- **Focal Date**: You can define the focal date for the analysis. Enter "0" for the current date (day, month etc.); "-1" for the previous day, week etc.
- **Range**: You can define the time period for the dates (relative to the focal date) to be included. In the example below all dates in the past 8 weeks "-8" and in the next 4 weeks "+4" (from today; "0" in **Focal Data** field) are included in the analysis.

Once you have defined a dynamic scale, the **Dynamic scale settings** dialog box is displayed.

Dynamic Scaling Settings of Date Fields

- **Show all**: Data that are outside of the bounds defined in the scale are displayed as well.
- **Show all smaller values**: Data that are below the minimum defined in the scale are displayed as well.
- **Show all larger values**: Data that are above the maximum defined in the scale are displayed as well.

Dynamic Scaling Settings of Catalog fields

- **Apply right settings**: If access to catalog values is denied based on the rights or tenants settings, you can determine that these data are not included in the analysis.

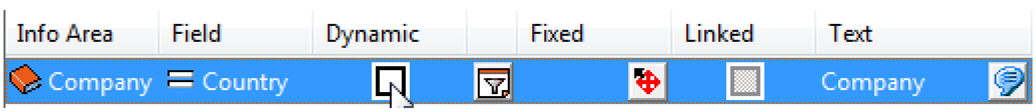
Dynamic Scaling of Rep fields

- **Apply right settings**: Excludes data assigned to a rep that is not accessible due to the rights settings. Your administrator can use this option to hide the excluded reps.
- **Aggregate reps**: Reps are aggregated based on their group allocation.
- **No reps**: Reps of the type **Employee** are not included in the analysis.
- **No resources**: Reps of the type **Resource** are not included in the analysis.
- **No groups**: Reps of the type **Group** are not included in the analysis.

Turn off Dynamic Scaling

The default for catalog and rep fields is dynamic scaling. To change to a fixed scaling:

1. Disable the **Dynamic** check box in the **x - axis - scaling** tab.



2. Click on (**Scaling**) to open the **Unit** dialog box. You can choose to group several catalog entries together as one group.

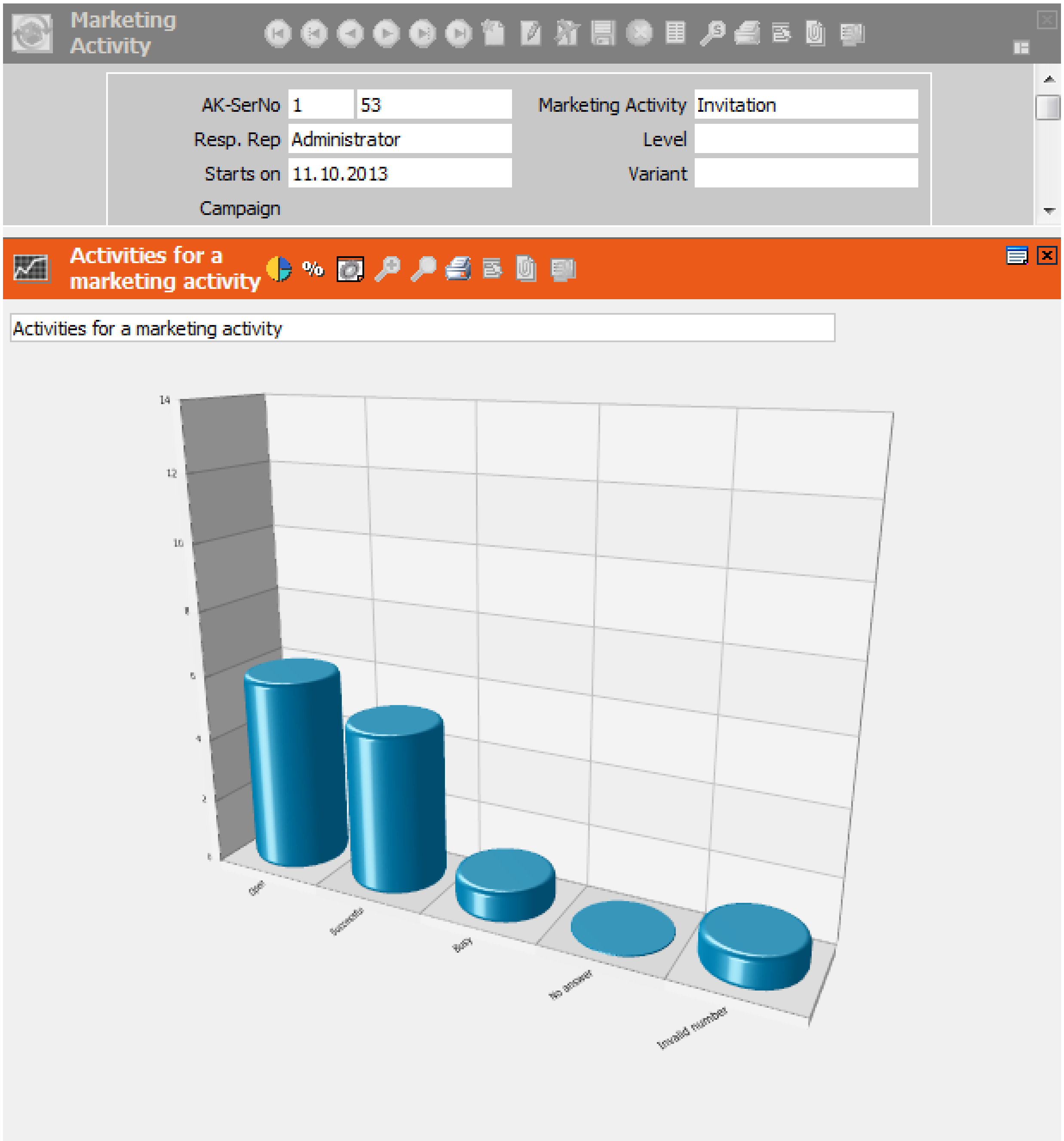
Note: A group is created for each of the catalog entries available in the field used for dynamic scaling. If you add further catalog values after defining the analysis, these new values are taken into account in the analysis. You need to update the scaling if you make changes to fixed catalogs, however.

Analyzing in Context

The context of the analysis can either be defined in the analysis itself (i.e. predefined), or can be determined when the analysis is started.

To analyze all activity records related to a marketing activity:

1. Select the **Marketing Activity** and **Activity** info areas in the transfer fields format.
2. Define an analysis unit for **Call Result** field in the **Activity** info area and an aggregation for the number of activity records.
3. Choose the current record as context.



The analysis is executed in the context of the currently selected marketing activity. If you switch to a different marketing activity record in the **Marketing Activity** info area at the top of the screen, the analysis is updated automatically.

Note: The first info area listed in the transfer fields must be included in the level that you start the analysis from.

You can also analyze the data in the level, rather than just the current record. The records in the current level (i.e. visible in list view) are included in the analysis.

Complex Analyses

Learn how to perform complex analyses.

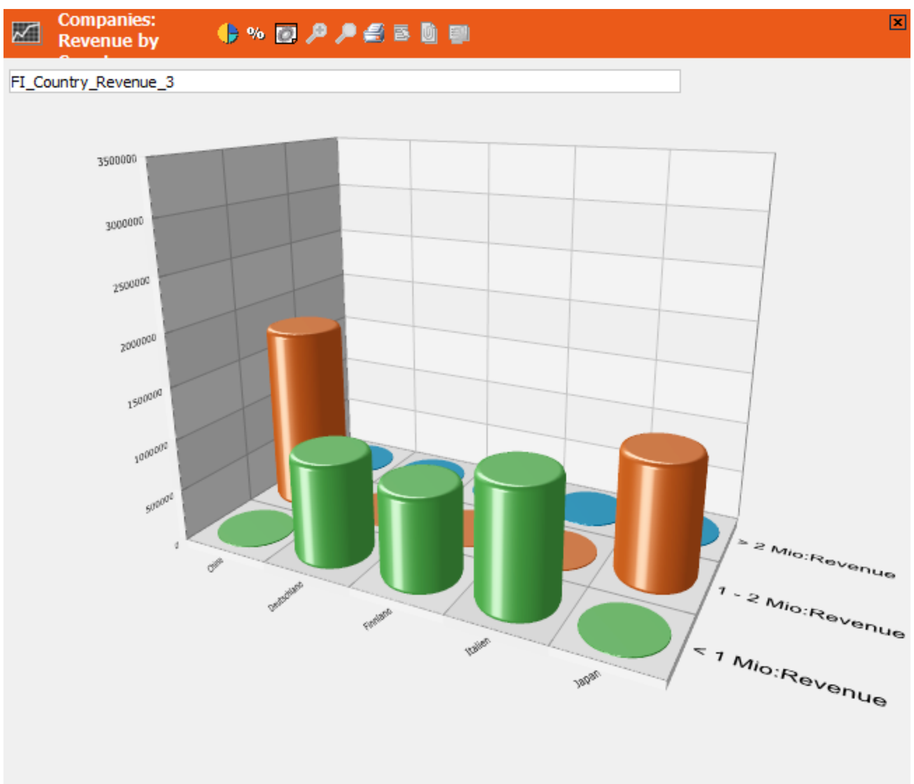
Conditions

Conditions allow you to determine further criteria used to categorize results:

1. Choose the **Country** field for the scale of the x-axis, as in the first example above.
2. As in the previous example, calculate the total revenue as an aggregation.
3. In addition, define the following settings in the **y-axis - scaling** tab:

Condition	Text
Conditions available	< 1 m
Conditions available	1 - 2 m
Conditions available	> 2 m

4. Start the analysis:

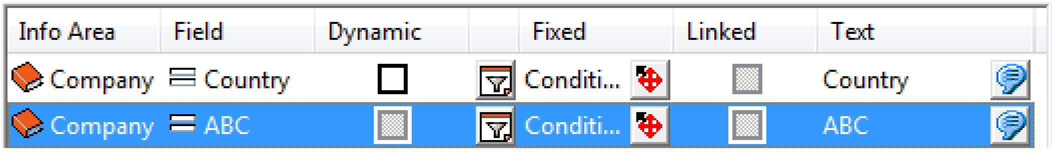


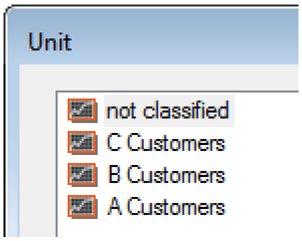
If you are using the ComponentArt graphics library, the conditions (levels) are displayed behind one another. If you are using Aurea's graphics, select **Split Levels** to display each level separately.

Note: If you use conditions and several aggregations, an analysis is generated for each combination of conditions and aggregations. With 3 conditions and 2 aggregations, the result would be 6 analyses.

Multiple Scales

You can define more than one unit for the x-axis; e.g. for **Country and ABC**:





The same data in the analysis is then grouped using two different criteria. Both analyses are displayed separately. There is no combined analysis using both the **Country** and **ABC** fields for classification (use the y-axis and conditions to do this).

When you execute the analysis, the first analysis unit is used. To switch to a different unit:

- Select either **> X** or **< X** from the context menu.
- Click on the header in the table view.

Analyzing Dependent Info Areas

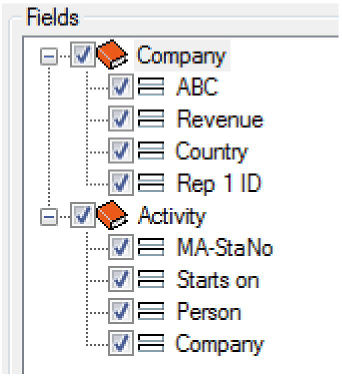
When analyzing dependent info areas (e.g. activities), information from the parent info area (company) is also relevant. Therefore, the drill-through analysis lists both the fields from the dependent and the parent info area.

To define an analysis for a dependent info area:

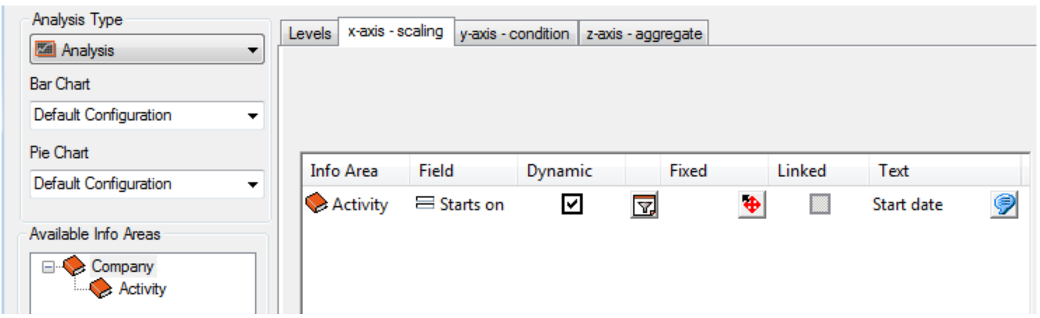
1. Define the parent info area (e.g. **Company**) as the first info area in the transfer fields format, and then the dependent info area (e.g. **Activity**) below the parent info area:

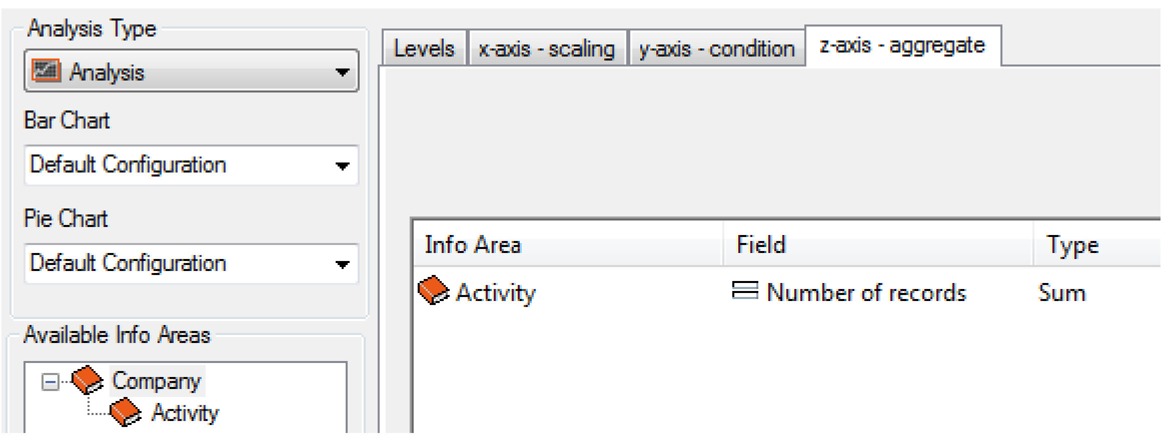
   

2. Define the fields to be displayed for the two info areas.

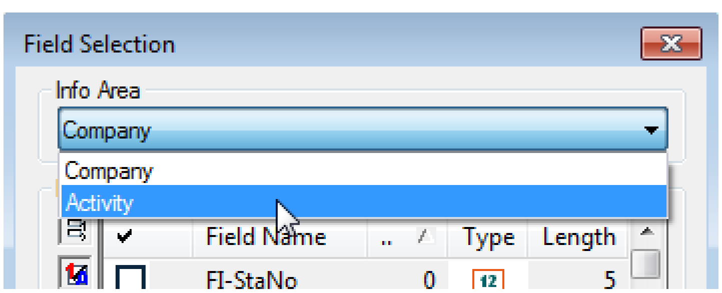


3. Define a scaling and aggregation for the activity:

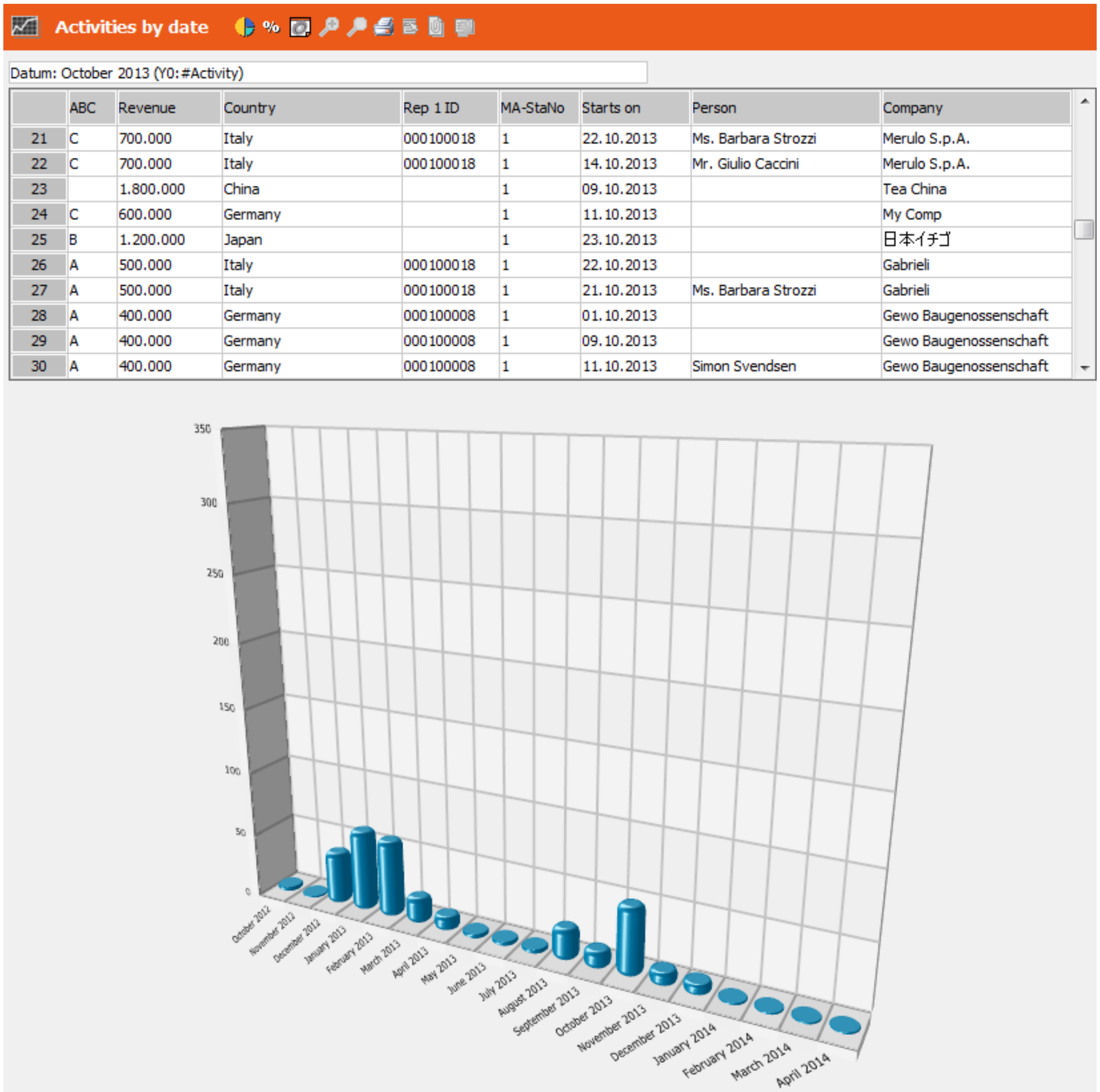




Note: If the top-most level (in this case **Company**) is selected under **Available Info Areas**, you can select fields from both info areas.

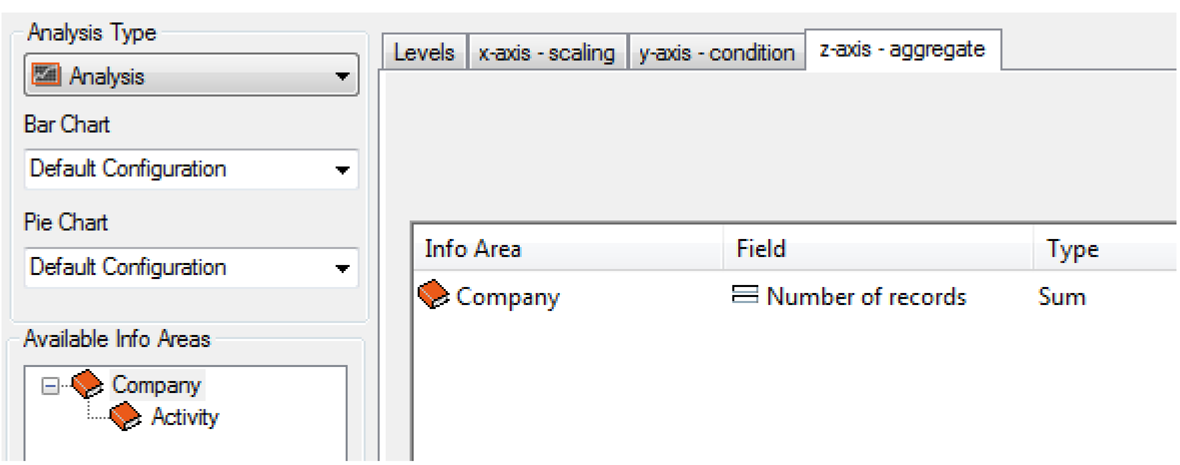


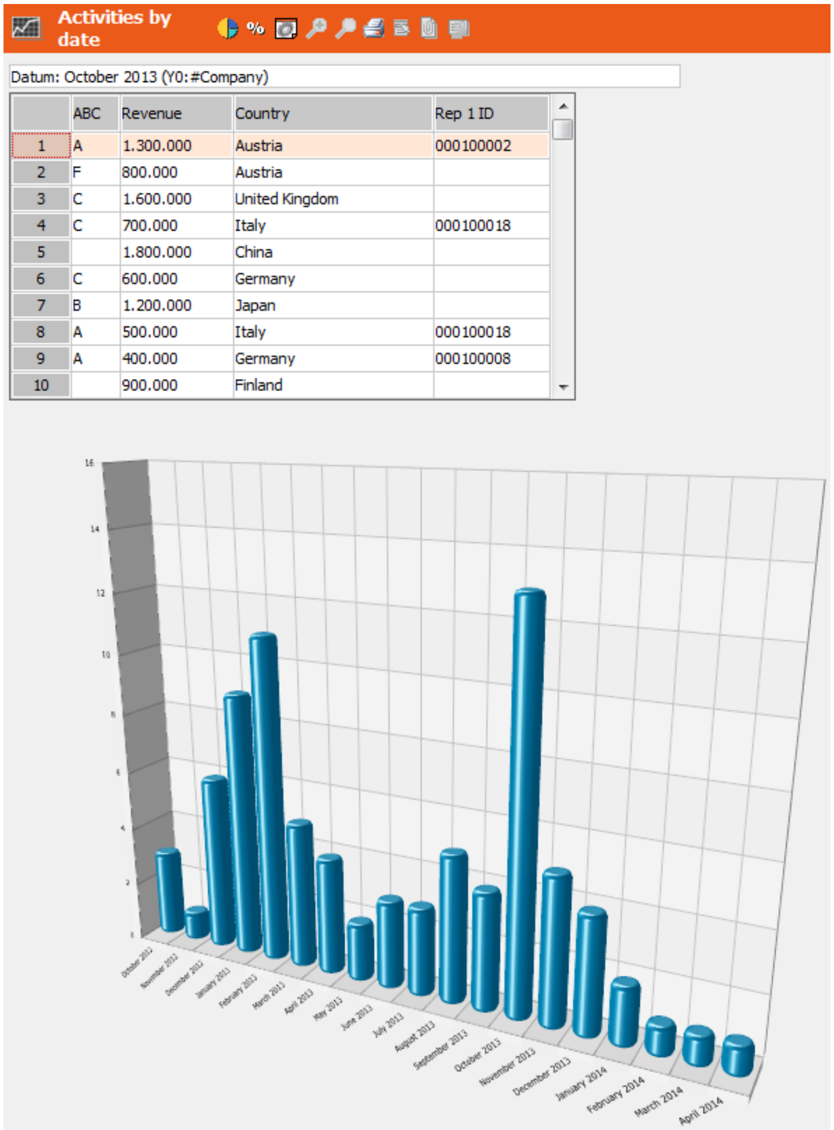
The number of activities is grouped by date in the analysis. Click on a bar to display the parent company and activity data in the table.



	ABC	Revenue	Country	Rep 1 ID	MA-StaNo	Starts on	Person	Company
21	C	700.000	Italy	000100018	1	22.10.2013	Ms. Barbara Strozzi	Merulo S.p.A.
22	C	700.000	Italy	000100018	1	14.10.2013	Mr. Giulio Caccini	Merulo S.p.A.
23		1.800.000	China		1	09.10.2013		Tea China
24	C	600.000	Germany		1	11.10.2013		My Comp
25	B	1.200.000	Japan		1	23.10.2013		日本イチゴ
26	A	500.000	Italy	000100018	1	22.10.2013		Gabrieli
27	A	500.000	Italy	000100018	1	21.10.2013	Ms. Barbara Strozzi	Gabrieli
28	A	400.000	Germany	000100008	1	01.10.2013		Gewo Baugenossenschaft
29	A	400.000	Germany	000100008	1	09.10.2013		Gewo Baugenossenschaft
30	A	400.000	Germany	000100008	1	11.10.2013	Simon Svendsen	Gewo Baugenossenschaft

If you define the aggregation for a company field instead, the drill-through displays only company data:





	ABC	Revenue	Country	Rep 1 ID
1	A	1.300.000	Austria	000100002
2	F	800.000	Austria	
3	C	1.600.000	United Kingdom	
4	C	700.000	Italy	000100018
5		1.800.000	China	
6	C	600.000	Germany	
7	B	1.200.000	Japan	
8	A	500.000	Italy	000100018
9	A	400.000	Germany	000100008
10		900.000	Finland	

Analyzing Several Info Areas

Aurea.CRM allows you to combine several info areas in one analysis. You have the following options:

- Analysis of data based on relationships in the data model, e.g. **Company** and **Activity**; **Marketing Activity, Mailing** and **Person**.
- Analysis of data not directly related in the data model but which can be associated using common criteria; e.g. marketing activities and companies per country or activities and orders by date.

Note: If several info areas are included in the transfer fields format, you can define a unit, conditions and aggregations for each info area. The unit, condition and aggregation defined for the lower levels have no effect; only the settings for the top-most level are applied. If you want to define an aggregation for a dependent info area (e.g. **Activity**), select the top level (**Company**) but select a field from the dependent (**Activity**)info area in the dialog box when defining the aggregation.

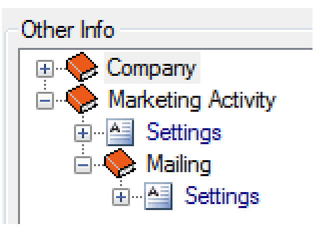
You can include several info areas in the transfer fields format:

- You can define several aggregations for each unit, which can be applied to various info areas (e.g. total number of companies, activities, mailings or total revenue).
- You can group persons by specialization, for example. The number of persons, activities and relationships stored for these persons can be compared.
- You can define several units (at the top-most level) and switch between these units once the analysis is displayed. You can define several info areas at the top-most level, however it makes more sense to define these as separate and independent analyses.

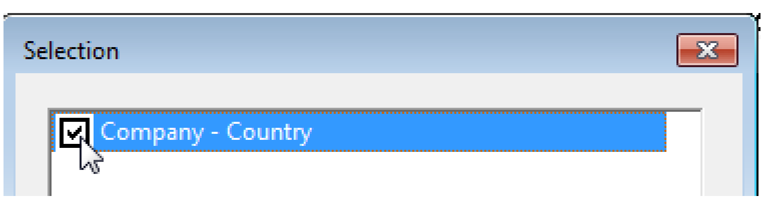
Linking scales

In the following example, the number of companies per country is compared to the number of marketing activities and mailings; i.e. the marketing activities and companies, which are not linked in the data model, are compared using the common field **Country**.

1. Define the transfer fields.
2. Select the following info areas:

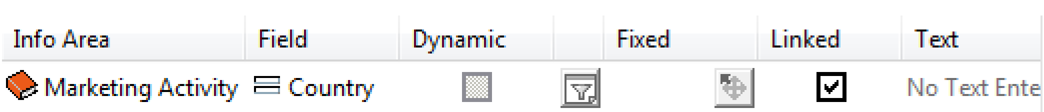


3. Define an analysis unit using the **Country** field in the **Company** info area and aggregations (**Revenue, No. Records**).
4. Select the **Marketing Activity** info area from the list of available info areas. The units and aggregations are no longer displayed.
5. Add a new unit using the **Country** field in the **Marketing Activity** info area.



6. Enable the option **Company - Country**. This determines that the unit defined for the companies is used for the marketing activities. The fields need to be of the same type; e.g. catalog fields that access the same catalog or date fields.

   The following is displayed in the **x-axis - scaling** tab for the marketing activity:



   The **Linked** option indicates that this unit is linked to another unit.

7. Add an aggregation for the total number of mailings for the **Marketing Activity**. Different aggregations are displayed, depending on whether you select **Company**

or **Marketing Activity** from the list of available info areas. If you select **Mailing**, no aggregation is displayed.

8. Start and configure the analysis (**Split Levels**, **Descending**, **Percent**, etc.).

Quadrants

You can use the quadrant analysis to analyze records graphically based on two numerical criteria.

This can be useful e.g. to determine cost-effectiveness.

To define an analysis using quadrants:

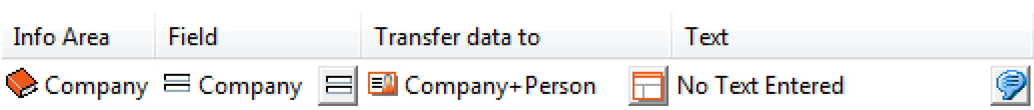
1. Select **Extras** > **Define Analysis**.
2. Define the transfer fields under **Info areas selection**.
3. Select **Quadrants** from the drop-down list.
4. Set the **Analysis Type** to **Quadrants** in the **Analysis** dialog box.

> **Note:** The **Analysis Type** radio buttons determine that the type of analysis is fixed. If you do not define a type, you can determine the type of analysis when executing the analysis.

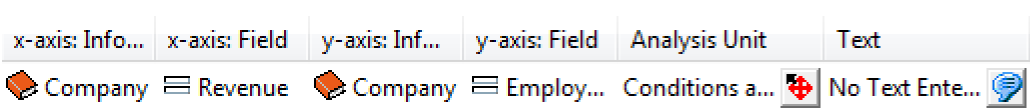
5. Determine the maximum **Number of records to display** on the **Levels** tab.

> **Note:** If you accept the default value (0), then a maximum of 10 records are displayed.

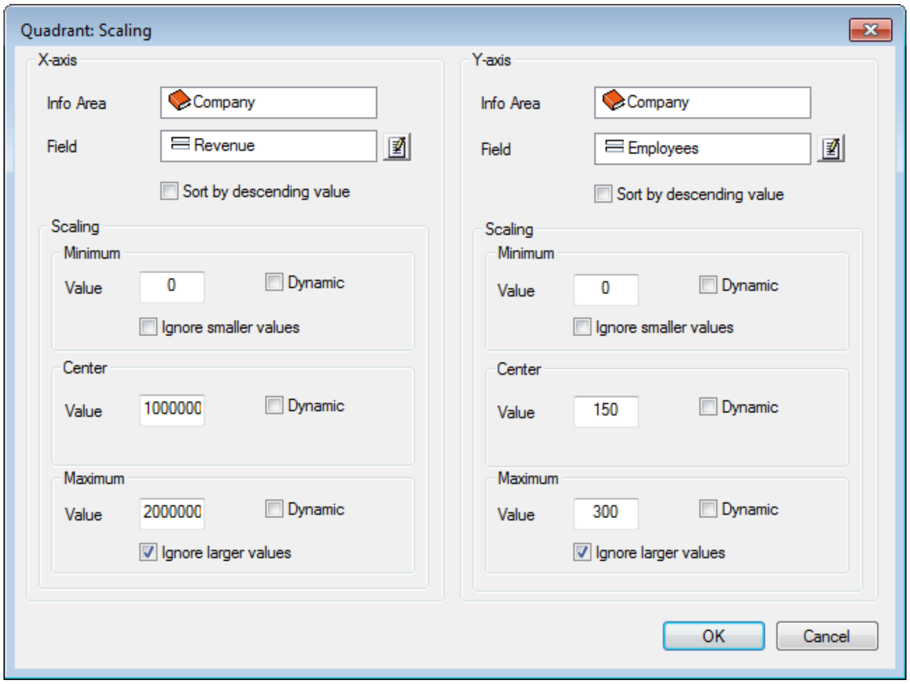
6. Determine the info area in which you wish to edit data (**Transfer data to**) and the fields that should be displayed in the quadrants analysis.



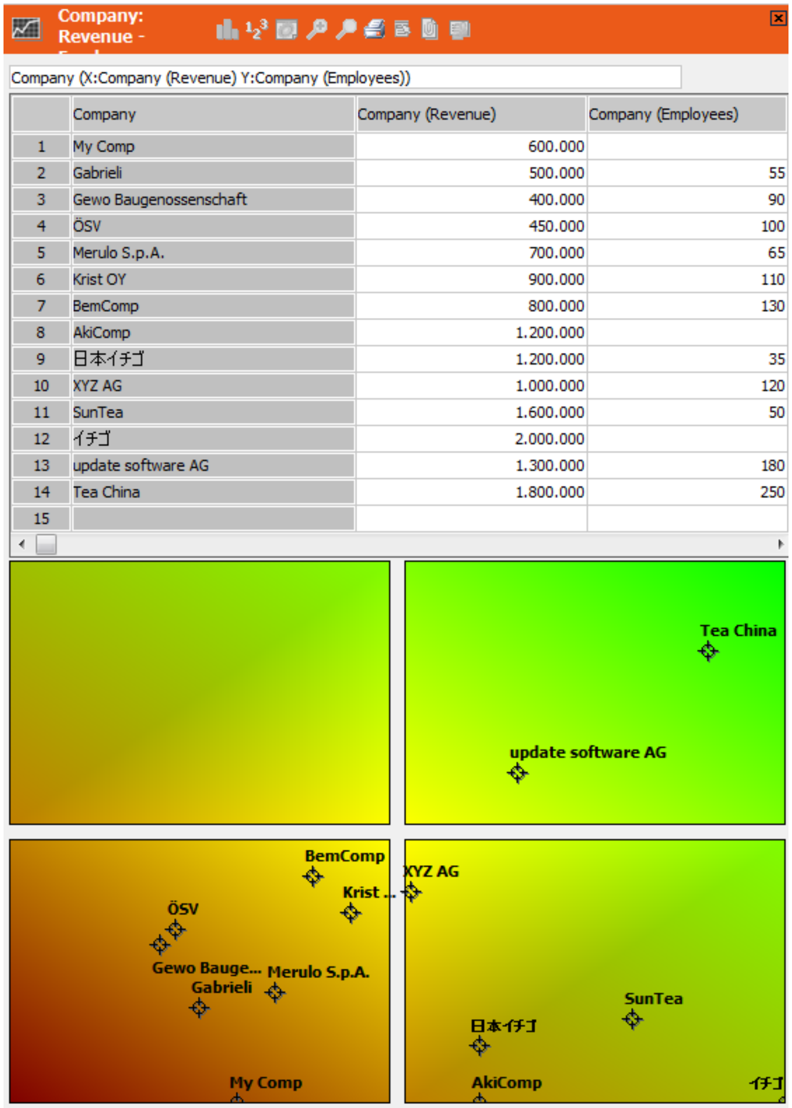
7. Switch to the **Axes** tab.
8. Define two fields to be compared in the analysis; e.g. **Revenue** and **Employees** .



9. Click on  (**Scaling**) to display the **Quadrant: Scaling** dialog box.



10. Determine the range of values that are included in the analysis for both fields (**Revenue** and **Employees**). Select **Ignore larger values** and **Ignore smaller values** in both cases.



	Company	Company (Revenue)	Company (Employees)
1	My Comp	600.000	
2	Gabrieli	500.000	55
3	Gewo Baugenossenschaft	400.000	90
4	ÖSV	450.000	100
5	Merulo S.p.A.	700.000	65
6	Krist OY	900.000	110
7	BemComp	800.000	130
8	AkiComp	1.200.000	
9	日本イチゴ	1.200.000	35
10	XYZ AG	1.000.000	120
11	SunTea	1.600.000	50
12	イチゴ	2.000.000	
13	update software AG	1.300.000	180
14	Tea China	1.800.000	250
15			

You can define more than one info area in the transfer fields format for a quadrants analysis. If you select a field from a dependent info area for either the x or y axis, these values are totaled. You can also choose to output the number of records. This allows you to compare the number of activities with total revenue, for example.

You can define several units. Only one is ever active at one time. Switch between different scales using the **< X** and **X >** entries in the context menu.

Timeline Analysis

The timeline analysis allows you to display data over intervals (time or numerical).

The following types of display are available:

- **By row:** Data in each row is accumulated; i.e. each row corresponds to the data in an aggregation. The aggregation can be based on the parent info area or a criterion.
- **Single display:** Individual records are displayed.

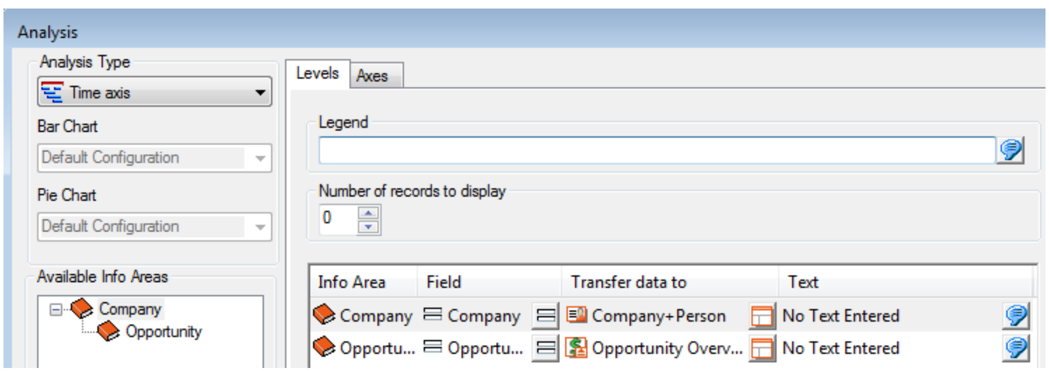
Displaying by Rows

When displaying data by row, several records are displayed in the same line. If this analysis is applied to child info areas (specified in the transfer fields format), this type of analysis is required. It is optional for analyses where the transfer fields are defined at the top-most level.

To display the opportunities (or activities etc.) per company on the timeline:

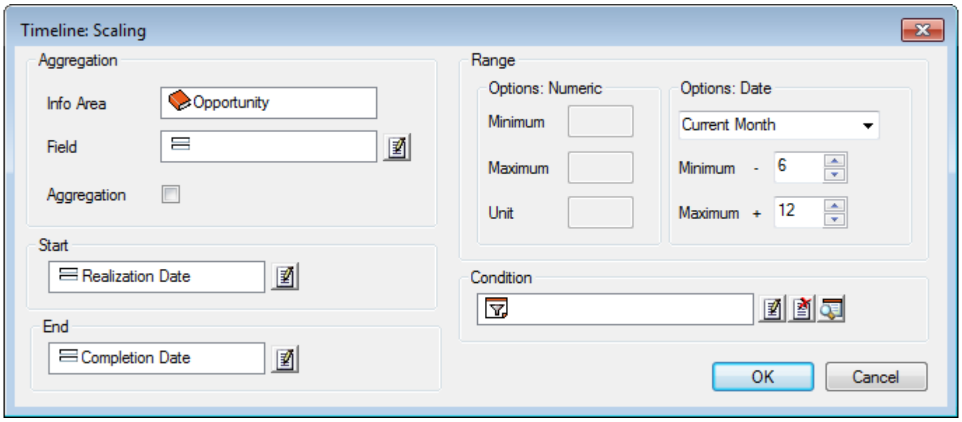
1. Define transfer fields for the **Company** and **Opportunity** info areas.

2. Define the analysis as a **Time axis**.
3. Enter the field to be displayed on the time axis in the **Levels** tab, and the info area in which the drill-through data are displayed.



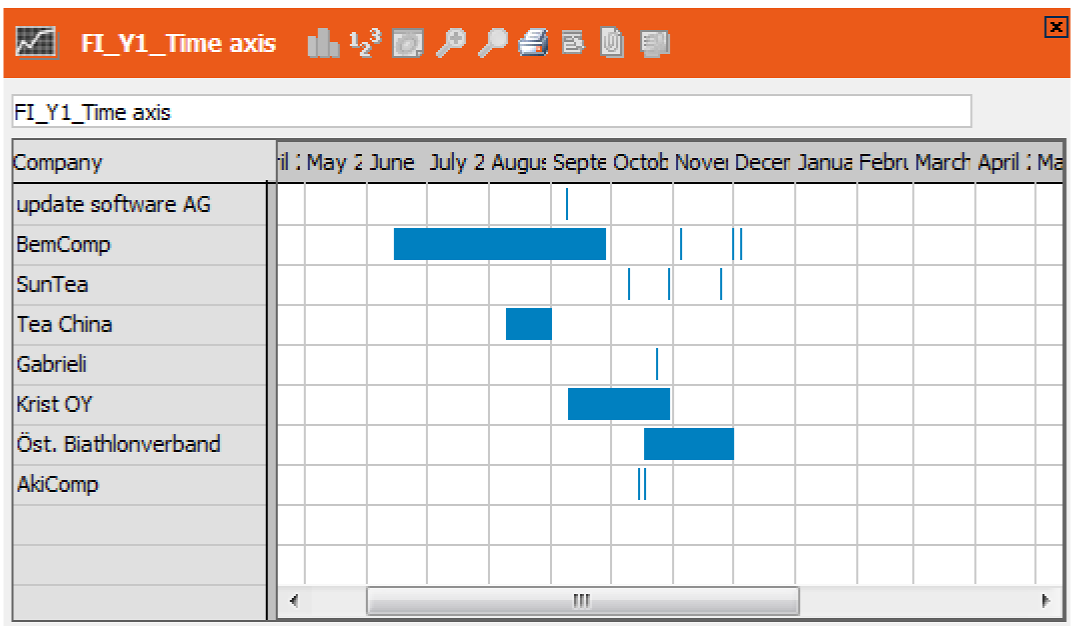
4. Switch to the **Axes** tab and add a new line with three fields:
   - Start: You can choose either numerical or date fields from the current info area and all dependent info areas (e.g. the opportunity's realization date).
   - End: You can choose fields of the same type from the same info area as the first field you selected (e.g. the opportunity's completion date).
   - Aggregation: Here you can choose fields from the same info area as the previous fields or leave the field empty

5. Click on  (**Scaling**) to display the **Timeline: Scaling** dialog box.



The **Start** and **End** fields you have selected are displayed. You can change the selection here, and determine whether the values are aggregated.

6. Use the pane to the right to determine the range. The available options depend on whether you have selected numeric or date fields. Define e.g. that the analysis includes data from the last 6 and next 12 months.
7. Save the analysis and execute it.



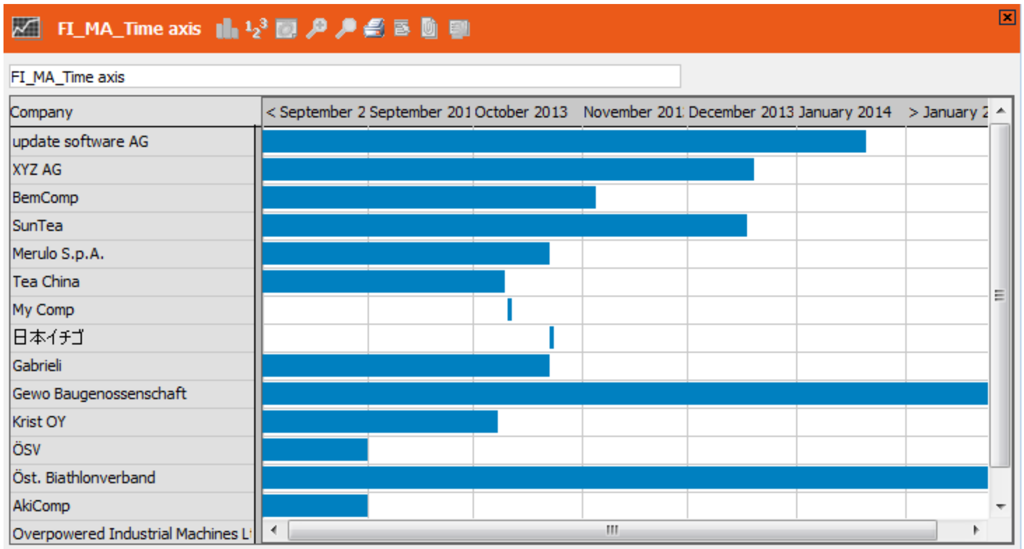
Each line contains the opportunities for the company. The cells are divided according to the unit you selected in the analysis, and the bars span the length of the opportunity.

8. If you enable the **Aggregation** option in the analysis format, the result changes (the first of all dates is taken as the start date; the latest of all the dates as the end date).

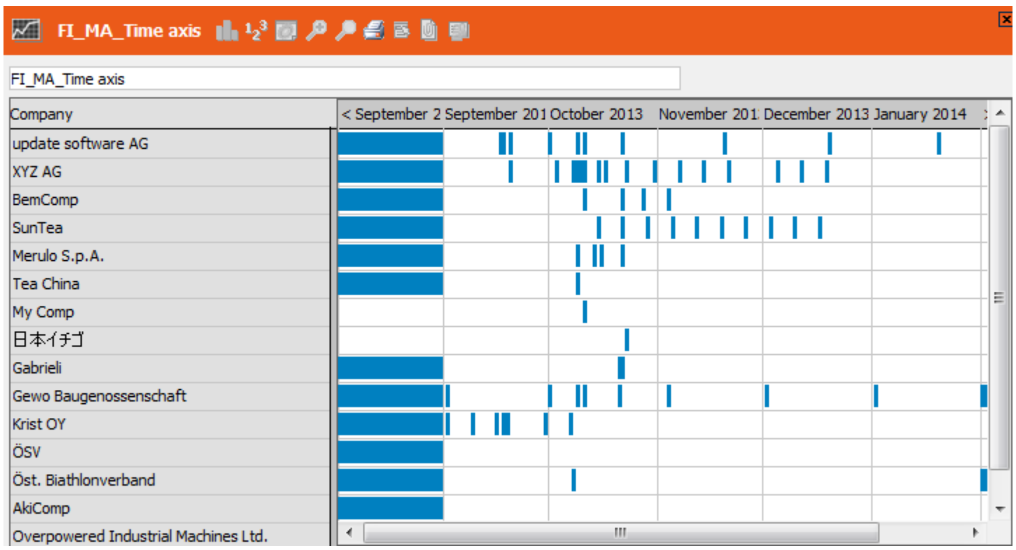
Example: Activity history for a company

The following example displays the activities for each company according to their date. In the timeline scaling select only starts on and ends on and leave the aggregation field empty.

With the **Aggregation** option active the result is as follows:

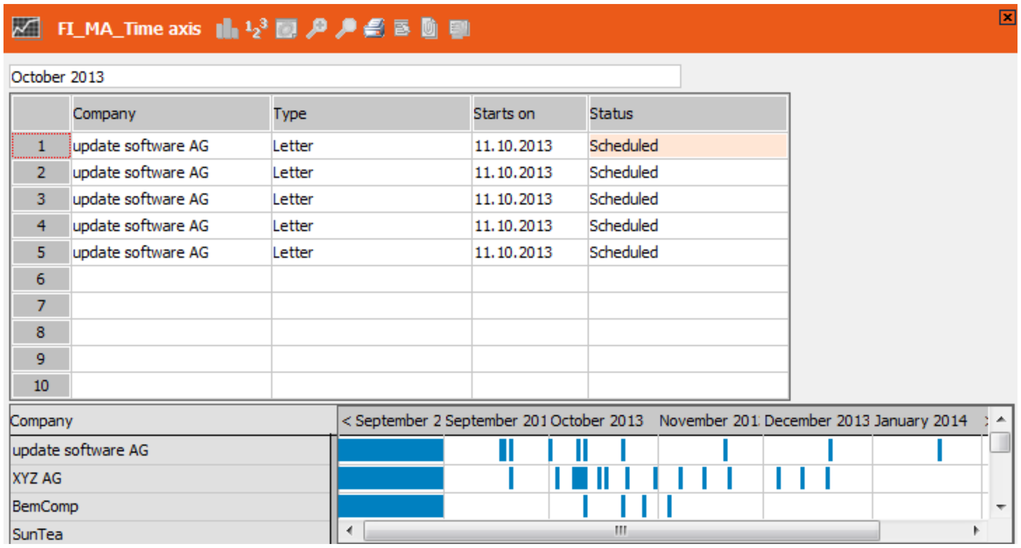


If the **Aggregation** option is not selected, the result is as follows:



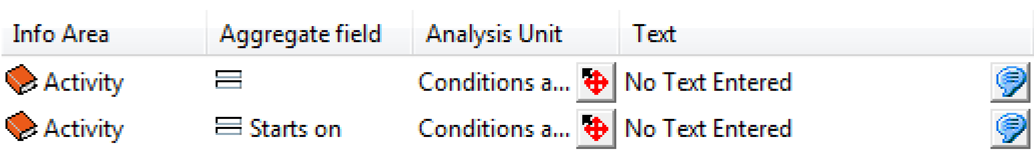
Drill-through

If you click on a bar in a cell, all records from the selected area are displayed above the analysis:



Using Several Axes

You can define several units:



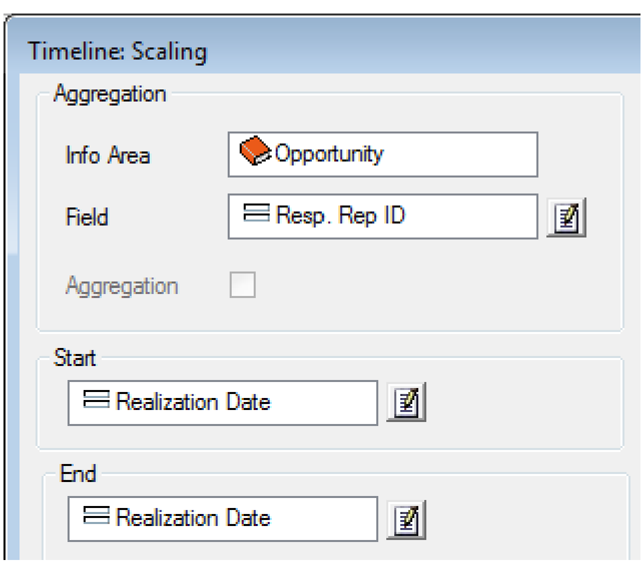
Only one unit is ever active at one time. Switch between different units using the **< X** and **X >** entries in the context menu.

Aggregation

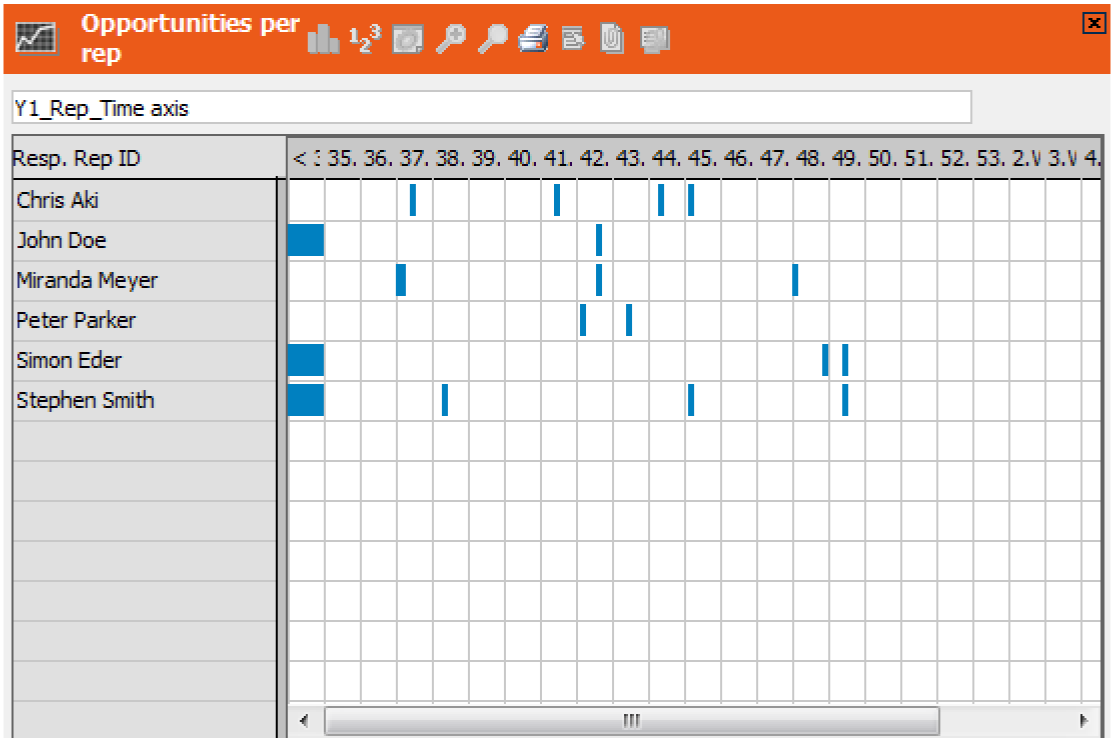
If you enable the **Aggregation** option when defining the **Analysis Unit**, the data is grouped by field, not by parent info area.

Example: Opportunities by Completion Date

Settings:



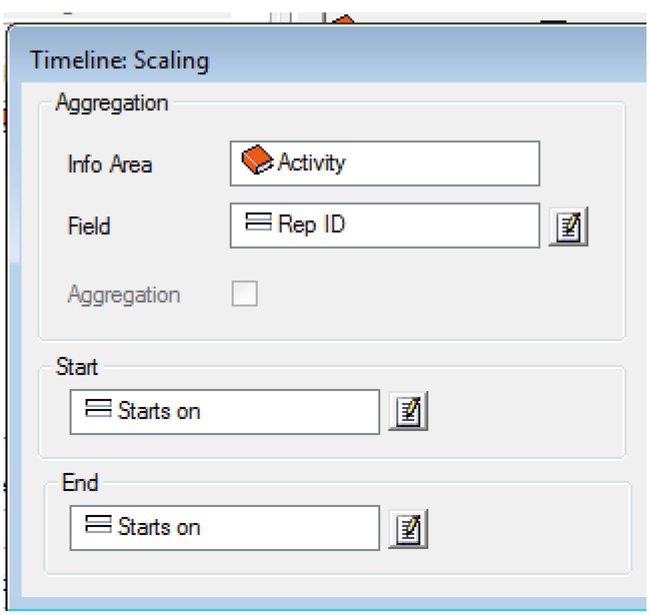
Result:



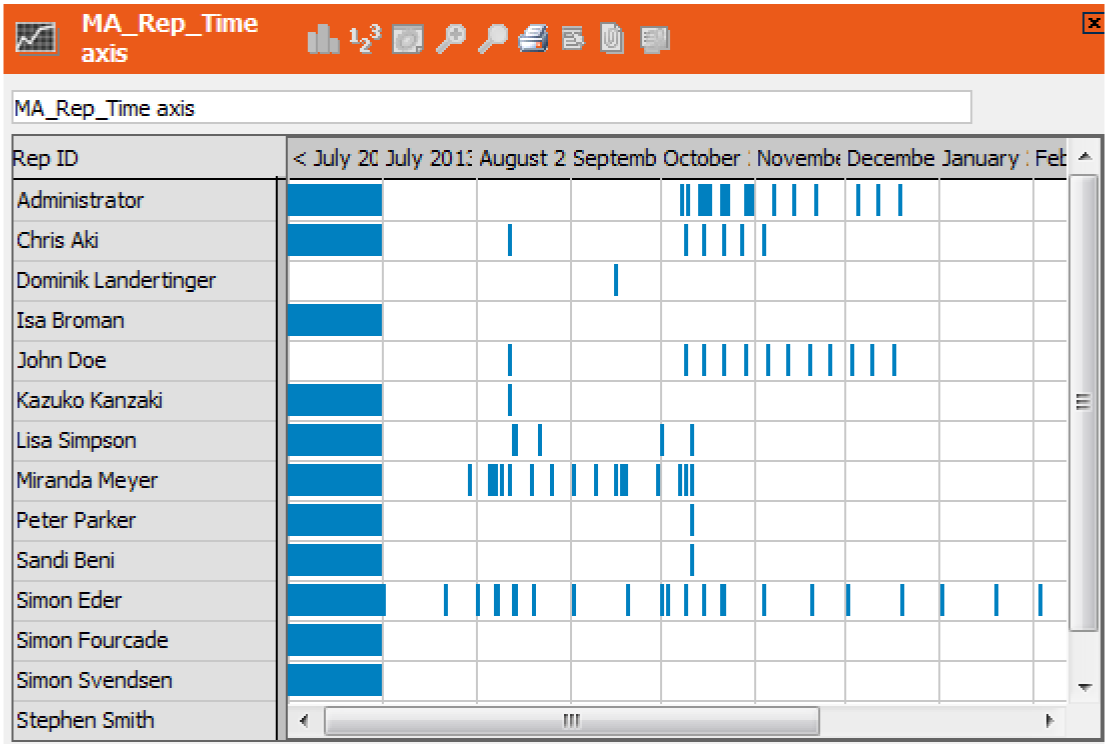
Example: Resource View per Rep

In the following example, the activities for each rep are displayed, with the scale set to monthly.

Settings:



Result:

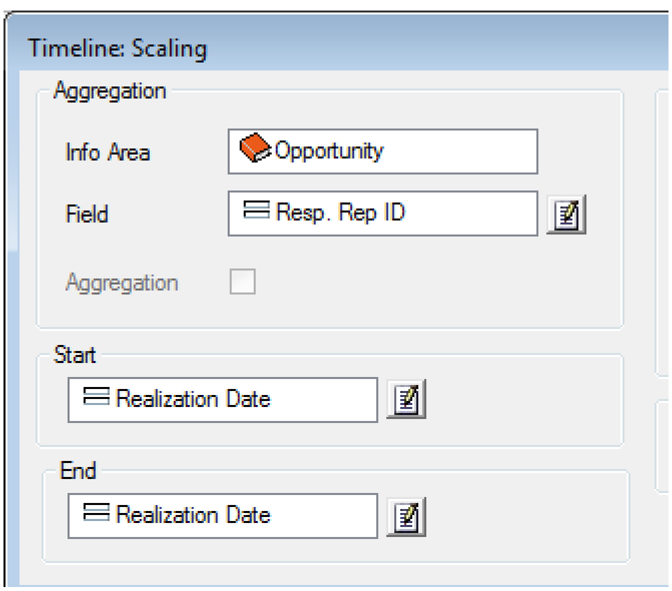


Single Display

You can choose to display single records in the time analysis. Each record is displayed in a cell in the corresponding column, instead of allocating a row to each group of records. The cells in the columns are filled from top to bottom.

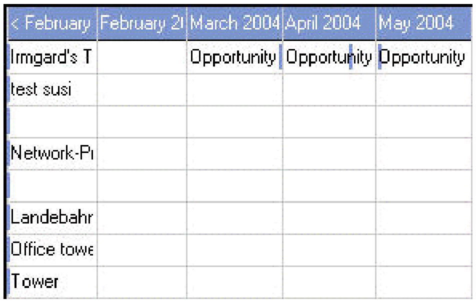
Example: Opportunities by Completion Date

Settings:



Only the **Opportunity** info area is selected. The scale is set to display months.

Result:



Reports

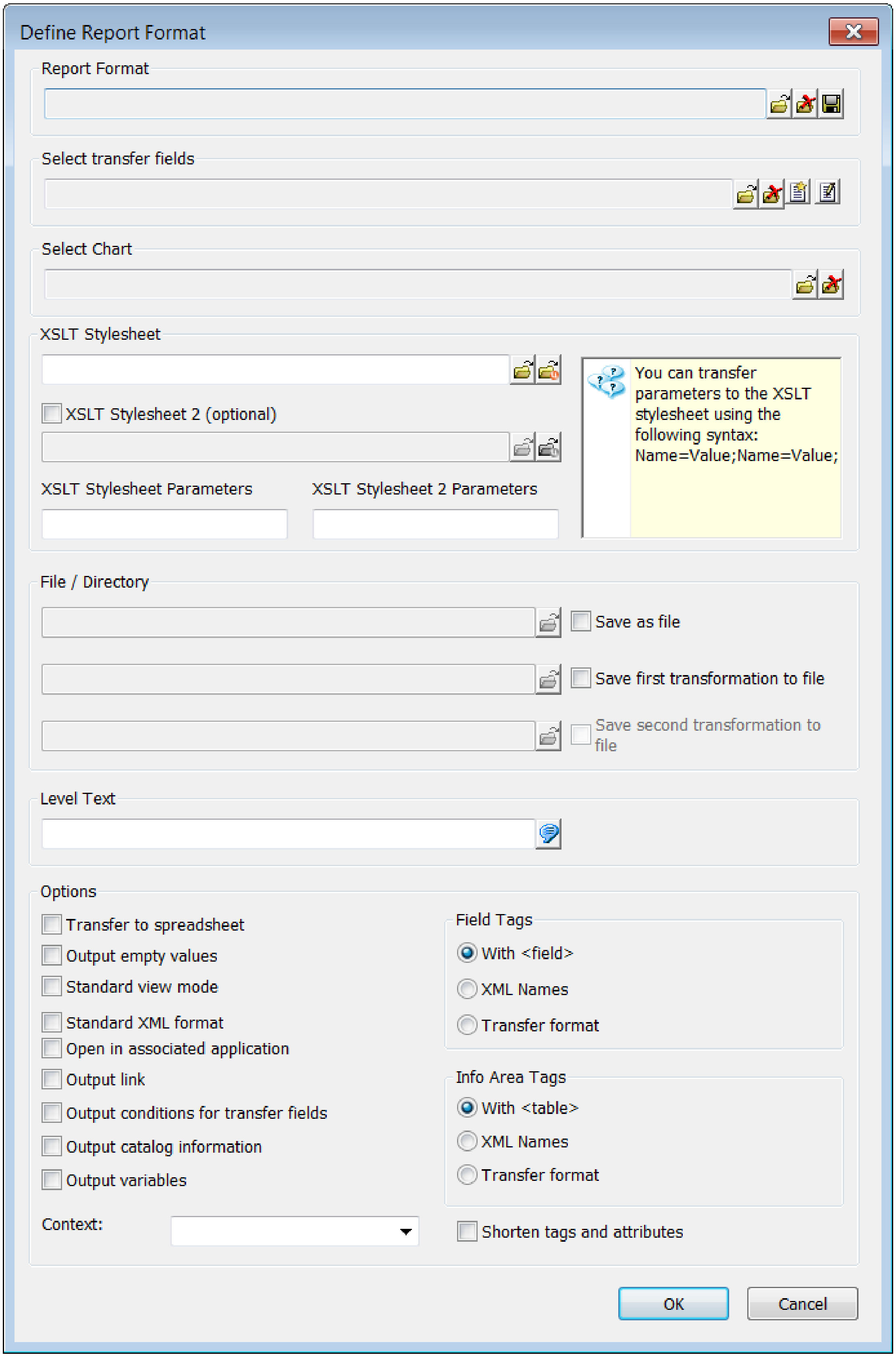
You can output the information stored in Aurea.CRM as reports using XML stylesheets.

Aurea.CRM includes a number of predefined stylesheets which can also be used as a starting point for creating your own. The information included in reports is defined using transfer fields, see Transfer Fields on page 79. You can also save the XML file or transfer the XML output to Excel.

Defining Report Formats

To output information from Aurea.CRM as an XML report, you need to define a report format.

Select **Extras > Define Report Format** from the menu. A dialog box opens:


Define Report Format
Report Format
Select transfer fields
Select Chart
XSLT Stylesheet
You can transfer parameters to the XSLT stylesheet using the following syntax: Name=Value;Name=Value;
XSLT Stylesheet 2 (optional)
XSLT Stylesheet Parameters
XSLT Stylesheet 2 Parameters
File / Directory
Save as file
Save first transformation to file
Save second transformation to file
Level Text
Options
Transfer to spreadsheet
Output empty values
Standard view mode
Standard XML format
Open in associated application
Output link
Output conditions for transfer fields
Output catalog information
Output variables
Context:
Field Tags
With <field>
XML Names
Transfer format
Info Area Tags
With <table>
XML Names
Transfer format
Shorten tags and attributes
OK
Cancel

The following options are available:

- **Report Format:** The name of the report format, see Saving, Loading and Deleting Formats.
- **Select transfer fields:** The name of the transfer fields format, see Transfer Fields on page 79.

The order in which the fields appear in the report depends on the order specified in the transfer fields format.

Note: Reports can contain a maximum of 64 info areas. If the transfer fields format you are using for a report contains more than 64 info areas, an error message is displayed when creating the report.

- **Select Chart:** If you want to output a chart, select a chart format here, see Chart Structures in the *Aurea.CRM win Administrator Guide.*
- **XSLT Stylesheet:** Select a stylesheet used to determine the appearance of the report. You can load a stylesheet from the local or network file system, as well as from Aurea.CRM's internal documents. You can also choose an Excel file (*.xlt or *.xltx) if the XML output is the source for an Excel file, see Transferring Data to Microsoft Excel on page 309.

If no stylesheet is selected the content of the XML file is displayed, see XML Format on page 312.

- **XSLT Stylesheet 2 (optional):** Enable this check box to select a second stylesheet.
- **XSLT Stylesheet Parameters/XSLT Stylesheet 2 Parameters:** You specify parameters for the stylesheets. Format:

<Parameter name> = <Value>; <Parameter name> = <Value>;...

For a list of all available parameters, see XSL Transformations on page 316.

If you specify two stylesheets (transformations), you can create two different files based on the XML data. In this case, the result of the first transformation is displayed.

- **File/Directory:** You can choose to output the XML data and resulting transformations directly to file (without displaying the result in Aurea.CRM). Enable the appropriate check boxes and enter the target file and directory (or click **Load** instead).

Note: You can use the following placeholders in path names:**$InstallDir:** Aurea.CRM application directory**$UserDir:** Aurea.CRM user directory

- **Save as file:** Enable the **Save as file** check box and enter a file name under **File/Directory** to save the output to a file.
- **Level Text:** Enter the text to be displayed in the report's header. If no text is entered here, the name of the report format is used instead.

Note: This option is not available, if **Save as file** or **Transfer to spreadsheet** are selected.

- **Transfer to spreadsheet:** Select this option to transfer the report data to your spreadsheet. If you do not select an Excel stylesheet under **XSLT Stylesheet**, the transformed data are displayed within Aurea.CRM.

The **XML Names** options for the **Field Tags** and **Info Area Tags** are enabled automatically when you select this option. This is necessary so that data can be allocated unambiguously in Excel.

- **Output empty values:** Empty numerical, date and time fields are output as if they contained "0". If this option is not enabled, empty fields are not transferred.

To correctly transfer empty date and time fields to Microsoft Excel, you need to format the corresponding cells in the Excel template, see Transferring Data to Microsoft Excel on page 309.

- **Standard view mode:** Select this option to transfer the decimal fields, percentage signs etc. to Excel exactly as displayed in Aurea.CRM (defined in the Windows regional settings). To transfer data correctly, the Excel template needs to be configured accordingly (thousands separators, decimal separator).

If this option is disabled, the template need not be customized, as data is transferred without any special formatting as follows:

- **Standard XML format:** Select this option to output data in international formats:
  - Dates: YYYY-MM-DD
  - Time: HH:MM
  - Boolean fields: "true" or "false"

If you enable both **Standard view mode** and **Standard XML format**, the standard XML settings apply to date, time and Boolean fields. The **Standard view mode** setting applies to all other fields.

- **Open in associated application:** Enable this option if you wish to display the generated file in the associated application. The associated application is determined using the "media-type" attribute in the stylesheet. If this option is disabled, the output is displayed in a browser window within Aurea.CRM.

Note: Two predefined stylesheets are supplied for output to Microsoft Word, see UpdateReportMaskWordML.xslt and UpdateReportListWordML.xslt.

- **Output link:** Outputs links for the records included in the report that can be interpreted by protocol.exe, see protocol.exe in the *Aurea.CRM win Administrator Guide*. This provides access to the records from the XML report.

Note: Your administrator can define in which level a record is displayed when clicking on a link in a report, see Selecting the Target Level in the *Aurea.CRM win Administrator Guide*.Your administrator can determine that links are output in a format that can be parsed by Aurea.CRM web, see Configuration Info Area (**Links** category, **web URL** option) in the *CRM.core Administrator Guide*.

- **Output conditions for transfer fields:** Outputs conditions for transfer fields in the report.

When using variable conditions, the values used upon starting the report are output to the report:

```
- <Conditions>
  - <table tableshort="FI" tablename="Firma">
    - <TableCondition>
        <Table rel="4" short="FI" usage="use" />
      - <Field rel="4" short="FI" fnr="36" fid="36" type="L" usage="cond">
        - <Condition>
            <CompOp>=</CompOp>
            <Value>20000000</Value>
          </Condition>
        </Field>
      </TableCondition>
    </table>
  </Conditions>
```

Output catalog information: Enable this option to output additional information on all catalog values in the report (catalog number, catalog value in the current language, catalog value in the base language, sort order and the external key, if available).

```
- <Catalogues>
    <Catalogue type="K" catNo="2" catval="4" mnr="0" langId="0" sortnr="1" extKey="deu">Deutschland</Catalogue>
    <Catalogue type="K" catNo="2" catval="35" mnr="0" langId="0" sortnr="5" extKey="arg">Argentinien</Catalogue>
    <Catalogue type="K" catNo="2" catval="2" mnr="0" langId="0" sortnr="0" extKey="blg">Belgien</Catalogue>
    <Catalogue type="K" catNo="2" catval="8" mnr="0" langId="0" sortnr="0" extKey="fin">Finnland</Catalogue>
    <Catalogue type="K" catNo="2" catval="3" mnr="0" langId="0" sortnr="0" extKey="fra">Frankreich</Catalogue>
```

Output variables: All variables visible to the current rep are output, see Variables in the *CRM.core Administrator Guide.*

```
<Variables>
  <Variable name="TC14234.bool" fieldtype="C">1</Variable>
  <Variable name="TC14234.catalog" fieldtype="K" catNo="2" catval="3">Schweiz</Variable>
  <Variable name="TC14234.date" fieldtype="D">10.12.2010</Variable>
  <Variable name="TC14234.filter" fieldtype="">F25='100'</Variable>
  <Variable name="TC14234.float" fieldtype="F">100,23</Variable>
  <Variable name="TC14234.integer" fieldtype="L">123456</Variable>
  <Variable name="TC14234.rep" fieldtype="L">010000003</Variable>
  <Variable name="TC14234.text" fieldtype="C">Test Text</Variable>
  <Variable name="TC14234.time" fieldtype="T">12:34</Variable>
</Variables>
```

The variable name, type, catalog number and parent catalog value (if applicable) are output. The contents of Boolean fields are output as either '0' (false) or '1' (true). Locked variables are not output.

- **Context:** You can choose which data is used to generate the report.

Select **Current level** to base the report on the current info area (including any defined conditions). Select **Current record** to output the current record, or **Entire database** to output the entire database.

If you leave this field empty, you can choose the context when generating the report.

- **Field Tags/Info Area Tags:** These options determine how the field and info area nodes are output to the XML.
  - **With <field>/<table>:** Fields and info areas are output using the **<field>** and **<table>** tags.

```
- <tables>
  - <table tableshort="FI" prefix="FI" recid="4294967297">
      <field fieldno="2" fid="2">update software AG</field>
      <field fieldno="5" fid="5" catNo="2" catval="1">Austria</field>
      <field fieldno="7" fid="7">1040</field>
      <field fieldno="10" fid="10">Operngasse 17-21</field>
    </table>

- <tables>
  - <Company tableshort="FI" prefix="FI" recid="4294967297">
      <Company fieldno="2" fid="2">update software AG</Company>
      <Country fieldno="5" fid="5" catNo="2" catval="1">Austria</Country>
      <ZipCode fieldno="7" fid="7">1040</ZipCode>
      <Street fieldno="10" fid="10">Operngasse 17-21</Street>
    </Company>
```

For more information on XML names, see Text in the Data Model topic of the *CRM.core Administrator Guide*.

```
- <tables>
  - <FI-Company tableshort="FI" prefix="FI" recid="4294967297">
      <FI-Company fieldno="2" fid="2">update software AG</FI-Company>
      <FI-Country fieldno="5" fid="5" catNo="2" catval="1">Austria</FI-Country>
      <FI-PostalCode fieldno="7" fid="7">1040</FI-PostalCode>
      <FI-Street fieldno="10" fid="10">Operngasse 17-21</FI-Street>
    </FI-Company>
```

- **Shorten tags and attributes**: The node names in the XML output are shortened. This can improve performance when working with large XML reports.

This option is only taken into account if the **With <field>** and **With <table>** options are enabled.

This option is not supported by the XSLT stylesheets supplied by Aurea.

The following abbreviations are used:

Catalog = c	mnr (cur. no abbreviation)
Catalogs = cs	name = nm
catNo = cn	ParCatNo = pcn
catVal = cv	ParCatVal = pcv
extKey = e	ParExtKey = pe
fid = fi	prefix = p
field = f	recid = ri
field_link = fl	sortnr = sn
field_ref = fr	table = t
fieldlength = fl	tablename = tn
fieldname = fnm	tables = ts
fields = fs	tableshort = tsr
fieldtype = ft	type = t

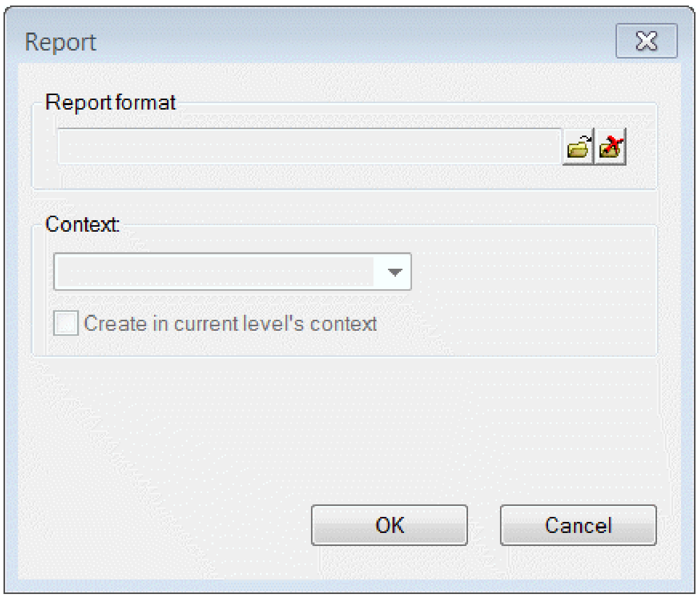
FixedCatalogues = fcs	value = v
langid = li	Variables = vars

Generating Reports

Learn how to generate reports.

To generate a report:

1. Select **File** > **Report** from the menu.



2. Select the desired report format using  (**Load**) button.
3. The **Create in current level's context** check box is only active if the report's context is set to **Entire database**, and allows you to create the report in the current context (as opposed to for the entire database).
4. If the report format does not contain a context, you can determine the context for the report using the drop-down list.
5. Select **Current level** to base the report on the current info area (including any defined conditions). Select **Current record** to output the current record, or **Entire database** to output the entire database.
6. Click **OK** to generate the report, or **Cancel** to abort.

You can also generate reports from the command line using the following parameters:

- **--xml "<report format>"**
- **--xfile "<path>"** (path to a file containing a report format on each line), see mm-ba.exe Parameters in the *CRM.core Administrator Guide.*

Prerequisites:

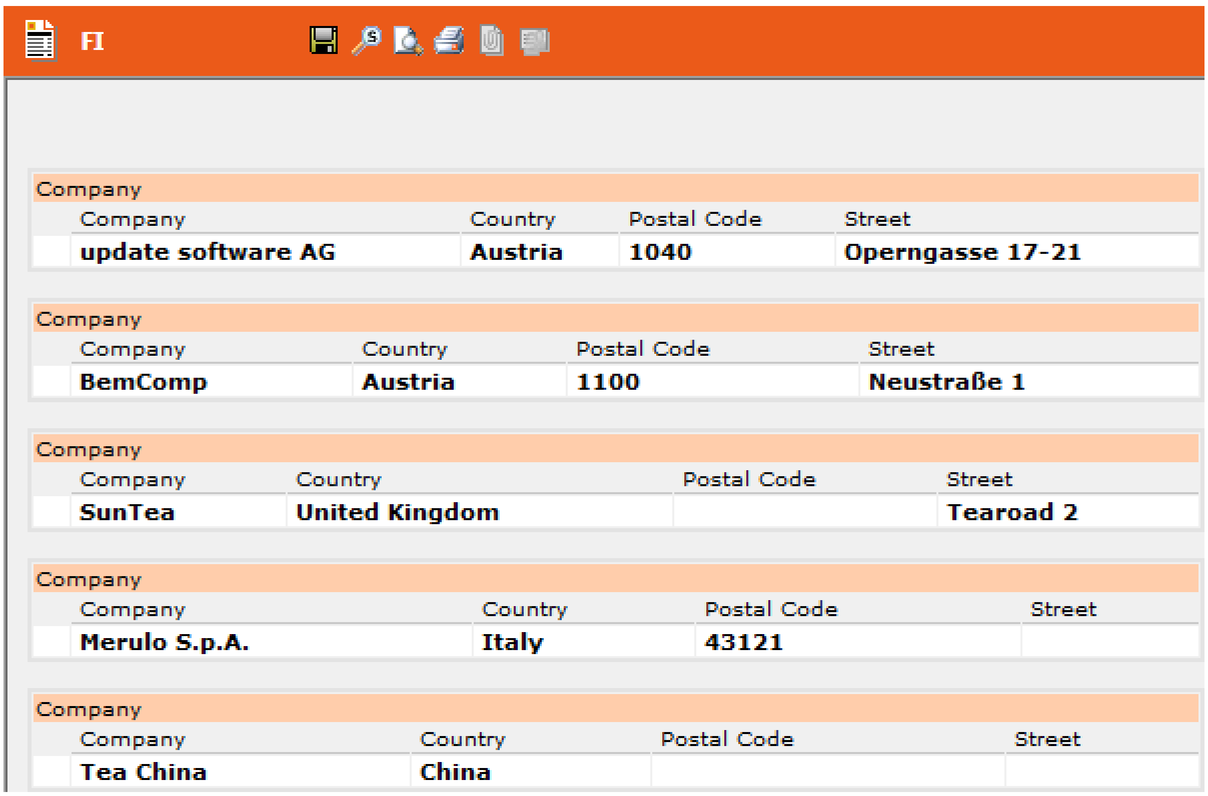
- The report format must be present in Aurea.CRM
- The path and file name of the report must be defined (in the **Define Report Format** window under **File/Directory** or under **Save first transformation to file**).
- The report may not contain any variable conditions.

If these prerequisites are not met, the report is aborted.

You can also generate XML reports automatically in the background or during the night and save them, see CRM.server in the *CRM.core Administrator Guide.*

Viewing the Report in Aurea.CRM

Unless you have chosen not to, the resulting report is displayed in Aurea.CRM:



The command bar at the top of the screen includes the following icons:

	Saves the report locally
	Searches the report for specific text
	Provides you with a print preview
	Prints the report

Note: If you change the report format, you need to close any reports generated using a previous version of this format, before the changes are applied to the output.

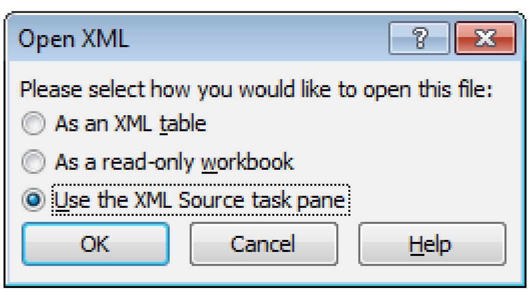
Transferring Data to Microsoft Excel

Learn how to transfer data to microsoft excel

To transfer a report to your spreadsheet:

1. Select **Extras** > **Define Report Format** from the menu.
2. Define the report format, see Defining Report Formats on page 300.
   - **Do not** select an XSLT stylesheet.
   - Ensure that the **Standard view mode** check box is **disabled** to ensure that thousand separators are transferred correctly.
   - Aurea recommends selecting either **XML names** or **Transfer format** under **Field Tags**.
   - **Do not** enable the **Transfer to spreadsheet** check box at this point.
3. Save the report format.
4. Select **File** > **Report** from the menu, and select the previously defined report format.
5. Click **OK**.

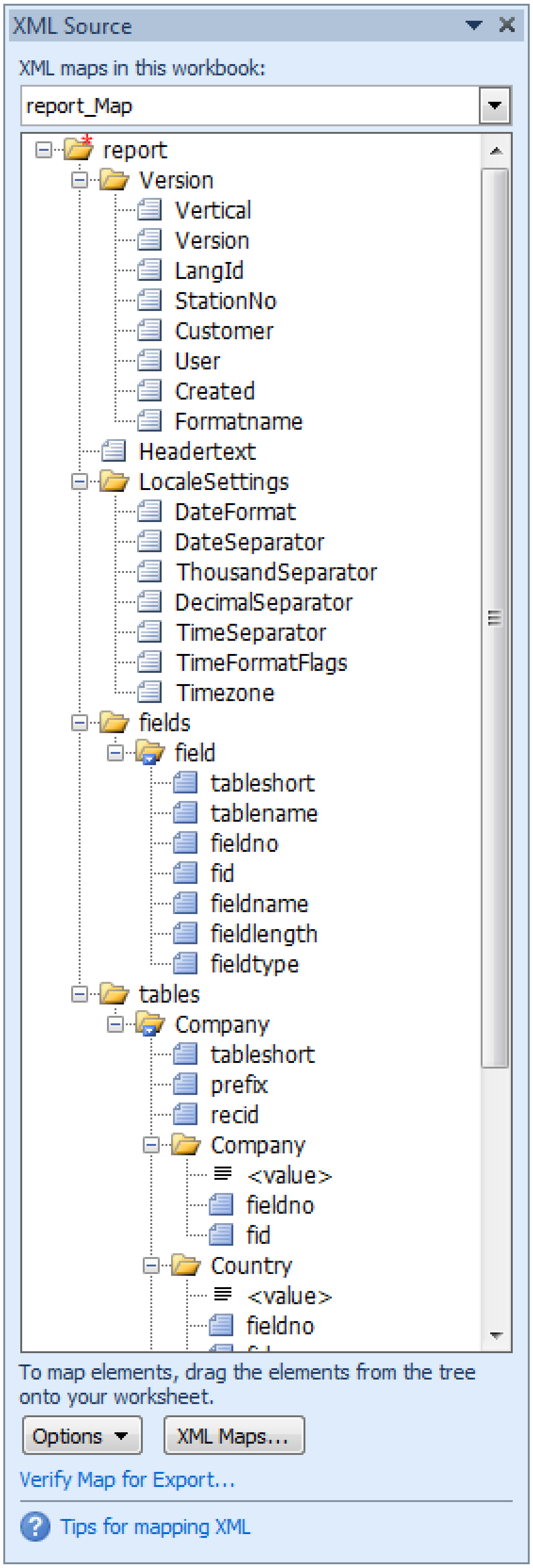
   The XML report is displayed.
6. Save the XML report using (**Save**).
7. Open the XML file in Microsoft Excel.
8. The **Open XML** dialog is displayed:

9. Select **Use the XML Source task pane**.
10. Click on **OK**.

    A message may appear informing you that the XML source does not refer to a schema. Confirm this message with **OK**.

    The nodes in the XML file are displayed as a tree on the right hand side. The output fields are listed under the **tables** node.



11. Drag the **<value>** node to the desired cell in the Excel table for each output field.

12. Format the cells in the Excel table using **Format Cells** to ensure that numbers and dates are transferred correctly.
13. Save the spreadsheet as an XLTX file (template).
14. Close Excel.
15. Return to Aurea.CRM win, and select **Extras** > **Define Report Format** from the menu.
16. Load the previously defined **Report Format**.
17. Enable the **Transfer to spreadsheet** check box.
18. Select the template you saved from within Excel under **XSLT Stylesheet**.

Note: Do **not change** any other options at this point, else Excel cannot correctly process the data types transferred.

19. Save the report format.

If you now generate a report using this format, the data is transferred from Aurea.CRM to Microsoft Excel:

	A	B	C	D
1	Company	Country	ZipCode	Street
2	update software AG	Austria	1040	Operngasse 17-21
3	BemComp	Austria	1100	Neustraße 1
4	SunTea	United Kingdom		Tearoad 2
5	Merulo S.p.A.	Italy	43121	
6	Tea China	China		
7	My Comp	Germany	77784	
8	日本イチゴ	Japan	11111	苺まち23
9	Gabrieli	Italy		piazza s. maria formosa
10	Gewo Baugenossenschaft	Germany	50935	Raumerstraße 20
11	Krist OY	Finland	00120	Mannerheimintie 123
12	ÖSV	Austria		
13	Öst. Biathlonverband	Austria		
14	AkiComp	Austria	1040	Landgasse 7
15	Overpowered Industrial Machines Ltd.	United Kingdom	S38 P12	King's Lane 55
16	イチゴ	Austria	wien	
17	ZZZ AG	Austria	1030	Löwengasse 35

PDF Reports

You can create PDF reports using CRM.win.

The main advantage is that the users that cannot edit or change such statements.

The following prerequisites need to be met to use PDF reports:

- .NET framework 4.5 must be installed.
- A configuration entry must be added in the **Configuration** info area (**Reports | Document Types**), see **Configuration Info Area** in the CRM.core Administrator Guide.
- Due to .NET security settings, PDF reports can only be generated using a local installation of Aurea.CRM win.

Please note the following when defining the report (For further information see Defining Report Formats on page 300):

- Select either a predefined stylesheet (**UpdateReportListPdf.xslt**, **UpdateReportMaskPdf.xslt**) or one of your own.
- If no plugin used to display PDF documents in Internet Explorer is installed, enable the **Open in associated application** option.
- Enable **With <field>** and **With <table>** if using one of the stylesheets supplied by Aurea.
- The file **..\system\xml_Aurea.PlugIns.Reporting.Pdf.xml** is available as a template. Create a copy (remove the "_" from the file name).

Information on all available parameters can be found on the Aurea support page at https://support.aurea.com.

- You can also define PDF forms (in Aurea.CRM win).

XML Format

The XML output contains information on the version of Aurea.CRM used as well as the data stored in the fields selected in the transfer fields format.

The start of the XML output contains the version-specific information:


```
- <Version>
    <Vertical>2</Vertical>
    <Version>6005</Version>
    <LangId>1</LangId>
    <StationNo>1</StationNo>
    <User>SU</User>
    <Created>20040930T1636</Created>
    <Formatname>Company Info</Formatname>
  </Version>
```


Vertical	The vertical used
Version	The version of Aurea.CRM used
LangId	Language in use

StationNo	Station number
User	The user that generated the report
Created	Date and time of creation (YYYYMMDDThhmmm)
Formatname	Name of the report format

This is followed by the current regional settings:

```
- <LocalSettings>
    <DateFormat>DD.MM.YYYY</DateFormat>
    <DateSeparator>.</DateSeparator>
    <ThousandSeparator>.</ThousandSeparator>
    <DecimalSeparator>,</DecimalSeparator>
    <TimeSeparator>:</TimeSeparator>
    <TimeFormatFlags />
    <Timezone>W. Europe Standard Time</Timezone>
  </LocalSettings>
```

DateFormat	Date format (D = Day, M = Month, Y = Year)
DateSeparator	Date separator
DateFormat-Flags	Only output if the year is specified using only 2 digits
ThousandSepa-rator	Thousands separator
DecimalSepara-tor	Decimal separator
TimeSeparator	Time separator
TimeFormat-Flags	Time format (AM/PM or empty for 24 hour format)
Timezone	Current time zone

This is followed by a list of the fields stored in the report:

```
- <fields>
    <field tableshort="FI" tablename="Firma" fieldno="36" fid="36" fieldname="Umsatz" fieldlength="13" fieldtype="L" />
    <field tableshort="KP" tablename="Person" fieldno="2" fid="2" fieldname="Nachname" fieldlength="30" fieldtype="C" />
    <field tableshort="KP" tablename="Person" fieldno="3" fid="3" fieldname="Vorname" fieldlength="20" fieldtype="C" />
  </fields>
```

tableshort	The abbreviation of the info area from which the field is taken
tablename	The name of the info area from which the field is taken
fieldno	The number of the field
fid	Fixed field number
fieldname	The name of the field
fieldlength	The length of the field in characters
fieldtype	The field type, see Data types in Aurea.CRM in the *CRM.core Administrator Guide.*

This is followed by the actual data from within Aurea.CRM:


```
- <tables>
  - <table tableshort="FI" prefix="FI" recid="4294967309">
      <field fieldno="36" fid="36">750.000</field>
      <field_link>update://mmba/Navigate/Goto?Key=FI-1-13</field_link>
      <field_ref>Huber GmbH</field_ref>
    - <tables>
      - <table tableshort="KP" prefix="KP" recid="4294967310">
          <field fieldno="2" fid="2">Huber</field>
          <field fieldno="3" fid="3">Nina</field>
          <field_link>update://mmba/Navigate/Goto?Key=KP-1-14</field_link>
          <field_ref>Frau Nina Huber</field_ref>
        </table>
      - <table tableshort="KP" prefix="KP" recid="4294967325">
          <field fieldno="2" fid="2">Apfelbaum</field>
          <field fieldno="3" fid="3">Andreas</field>
```


tableshort	The abbreviation of the info area
prefix	The field prefix of the info area (transferred from the transfer fields format; **Extras** à **Define Transfer Fields** > Select an info area > **Edit** > **Info Area** tab > **Field Prefix** field). If an info area is transferred multiple times per report, the prefix is complemented by a serial number (e.g. FI, FI1 etc.).
recid	The record's ID
fieldno	The field number
fid	Fixed field number
catNo	Contains the catalog number if the field is a catalog field
catval	Contains the catalog value if the field is a catalog field

parCatVal	Catalog value of the parent catalog (only for dependent catalogs)
field_link	Contains the address for links, if **Output Links** is enabled
Languages	Sub-node: language used
Catalogs	Sub-node: Catalog values used in the report. Catalog type: K = catalog, x = fixed catalog in Aurea.CRM win, o = fixed catalog in Aurea.CRM web)catNo: Catalog numbercatval: Catalog valuemnr: Tenant number langId: ID of the language used extKey: External key of the catalog value Only for dependent catalog values: ParCatVal: Parent catalog value ParCatNo: Number of the parent catalog ParCatExtKey: External key of the parent catalog value

Special Case: The **Result** field in the Communication Logs info area stores a combination of values from several columns in the info area, see Communication Logs in the Aurea.CRM win Administrator Guide. These are output as multiple attributes in an XML report.


```
- <field fieldno="34" fid="34">
    <fieldrow tableshort="ID" input="117" insert="117" update="0" delete="0" false="0" similar="0" denied="0">Bearbeiter</fieldrow>
    <fieldrow tableshort="AS" input="8" insert="7" update="1" delete="0" false="0" similar="0" denied="0">Station</fieldrow>
```


Attribute	Column in the Communication Logs info area
input	Recs
insert	New
Aurea	Upd
delete	Delete
false	False
similar	Sim F.
denied	Denied

Attribute	Column in the Communication Logs info area
output	Out
sync	Synchronization
basedate	Base Date
basetime	Base Time
match	Match

Special Case: History records are output in a BLOB (Binary Large Object), see History in the *CRM.core Administrator Guide.* To output history records in an XML report, add one or more of the following virtual fields to the transfer fields format: **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 use in XML reports and for exporting, and otherwise have no function.

The history records are output below the <tables> node of parent records. The selected fields are output for each field change below the <tables> nodes of the history records. No history is output in the report for fields in the parent record that the current user cannot access due to their access rights.

Note: Only use the fixed field number (**fid**) or the XML name to further process the report, and not the sequential field number (**fieldno**). The fixed field number and XML name remain constant, even if new fields are added to the default data model in future versions of Aurea.CRM.

XSL Transformations

Aurea CRM includes several predefined XSLT files (located at **..\system\xml**) that can be used to create reports.

For information on XSL transformations for PDF reports and a summary of the included XSLT files and their settings see https://support.aurea.com.

UpdateReportList.xslt

Outputs the report as a list with the **Field tags** option set to **With <field>**.

Parameters:

stylesheet	The stylesheet used; default is **Aurea_format_orange.css**
imagepath	The path used for images and stylesheets; default is **..\system\xml\images**
showlink	1 = show links (used by **protocol.exe**); only available if **Output Links** is selected in the report format.
ShowInfoHeader	1 = Display header with info area name; default = **1**.
ShowHeader	1 = Display list header; default = **1**.

UpdateReportMask.xslt

Records are displayed as masks, with the **Field tags** option set to **With <field>**.

Parameters:

stylesheet	The stylesheet used; default is **Aurea_format_orange.css**
imagepath	The path used for images and stylesheets; default is **..\system\xml\images**
columns	Number of columns in the display; the default is **2**
showlink	1 = Display links for **protocol.exe**. The first field in the mask is displayed as a link to the record. This only applies if **Output link** is enabled in the format.
ShowInfoHeader	1 = Display the header with info area names; the default is **1**.

UpdateReportListWordML.xslt

Outputs a list of records in list form in Microsoft Word.

The **With <field>** option must be enabled in the report format.

Parameter:

ShowInfoHeader	1 = Display the header. The default value is **1**.

UpdateReportMaskWordML.xslt

Outputs a list of records in mask form in Microsoft Word.

The **With <field>** option must be enabled in the report format.

Parameters:

columns	Number of columns in the mask. The default value is **2**.
ShowInfoHeader	1 = Display the header. The default value is **1**.

4

Aurea.CRM and Third-Party Products

Learn how Aurea.CRM win can automatically transfer data to other Windows applications.

You have the following options:

- Transfer data from Aurea.CRM to your word processor to generate bulk letters.
- Transfer data to a spreadsheet for further processing.
- Transfer data to your e-mail client.

Word Processor

Learn how to transfer data from Aurea.CRM to your word processor.

Below are the various methods to transfer data from Aurea.CRM to your word processor.

Preparation

Learn the steps to transfer data from Aurea.CRM to your word processor to generate document merges and single letters.

Follow the below steps:

- Select **Extras** > **Document Directories** from the menu. Choose the version of your word processor. You can also specify default directories for your documents, see Document Directories on page 247.
- Ensure that a label has been specified for the recipient (**Label** field in the **Person** or **Person in Company** info areas).

Define a label format by selecting **Extras > Define Label**, see Label Formats.

- Define a transfer fields format if necessary (by selecting **Extras > Define Transfer Fields**) containing the fields you wish to use in the letter, e.g. the order number, see Transfer Fields on page 79.
- Create the document that contains the body text for your letter and save the document.
- Define a transfer format (format type "Word processor"), Defining Transfer Formats
- Establish a connection with your word processor, see Establishing a Connection with the Word Processor.

Label Formats

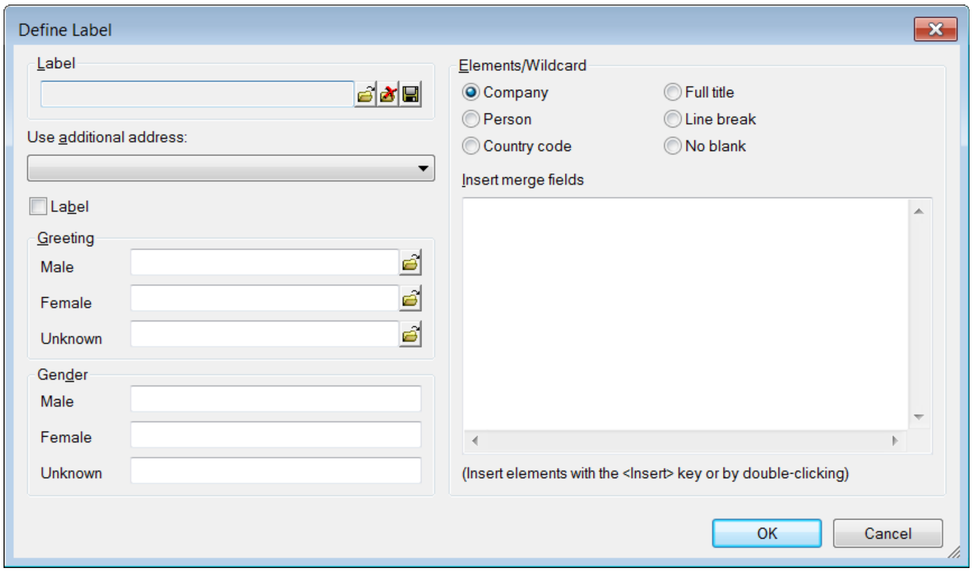
To transfer the correct address and contact information to a letterhead, you need to define label formats. Assign a label format to each company or person record (in the **Label** field) to ensure that your mailings reach your customers.

Note: To transfer fields from info area other than **Company**, **Person** and **Person in Company**, you need to define transfer fields, see Transfer Fields on page 79.If you start the transfer from a dependent info area (e.g. **Offer**), no label fields are transferred. To transfer label fields, the **Company** and **Person** info areas need to be included in the transfer fields format.

Defining Label Formats

To define a label format:

1. Select **Extras > Define Label** from the menu.



2. By default, the fields used in the letterhead are transferred from the address in the **Company** info area. If you wish to use an address from the **Additional Address** info area instead, select an entry under **Use additional address**.
3. If the label format is used to print labels, enable the **Label** button. A line break is then inserted every 35 characters. Otherwise lines are restricted to 250 characters.

Note: If you use the same format for various tasks, you can use the **Line Break 1-3** fields in the **Company** info area to determine where new lines are added. This information is saved automatically when the company name is first added if it contains line breaks.

---

4. To add elements to the label, select an option under **Elements/Wildcards** and double-click on the desired position in the **Insert merge fields** text field. The following options are available:

   - **Company** or **Person**: Select the desired fields from the dialog box.

   Note: When defining labels for the **Person** (PE) info area, you can only use those fields that are assigned to the **Person in Company** (KP) info area, see Data Model (KP) in the *CRM.core Administrator Guide*. Fields in the **Contact Person** (CP) info area Felder cannot be used.

   Place the elements in the position you want them to appear in the letterhead. You can edit the elements as with normal text and add new lines using the Enter key.

   When a letter is generated using the format, the placeholders are replaced by the corresponding entries from the database (e.g. **FI2*Company** would be replaced by the name of the company).

5. Determine the greeting used in the letter under **Greeting**.

   The greeting is determined by the value in the **Form of address** field. If the field is empty, the **Unknown** greeting is used.

   Placeholders in the **Elements/Widcard** area can also be added to this text field using the Insert key of by double-clicking.

6. Determine how you want to address the genders (e.g. Mr., Ms.) based on the entry in the **Form of address** field in the person record. This replaces the **{KP0*Form of address}** placeholder in the letterhead. If no form of address has been entered in a person record, the **Unknown** entry is used.

   Note: The length of the fields in the **Gender** pane is restricted to 20 characters.

7. Save the format and click on **OK**.

   Use the **Label** info area to verify the contents and formatting of the label (select **Info** > **Label** from the menu).

Letterhead Examples

The following example demonstrates how to define the address and greeting:

Defining the Address:

1. Select the company fields used to form the address of the company; e.g. **{FI2*Company}{FI10*Street}{FI7*Postal Code}{FI8*City}**.
2. Select the person fields used to form the recipient; e.g. **c/o {KP0*Form of address} {KP2*Last Name}** To define the greeting "Dear Mr. Miller":
3. Click in the **Male** greeting field.
4. Enter the consistent part of the text, e.g. "Dear".
5. Enable the **Person** radio button.
6. Double-click in the **Male** greeting field to the right of "Dear".
7. Select **Form of address** and **Last Name** from the **Field Selection** dialog box, and confirm with **OK**.

The chosen elements are inserted into the greeting:

Dear {KP0*Form of address} {KP2*Last Name}

8. Enter spaces between the elements.
9. Click on (**Save**).

   The placeholders are replaced by data when transferred to the word processor.

   {KP0*Form of address} is replaced by "Mr."

   {KP2*Last Name} is replaced by the person's last name.

Preventing Blank Lines

To prevent blank lines from being output:

1. Select **Extras** > **Define Labels** from the menu.
2. In the **Elements/Wildcard** area, enable the **No blank** radio button.
3. Place the cursor left or right outside the curly brackets enclosing the variable (e.g. **{FI2*Company} |**).
4. Double-click at this position.

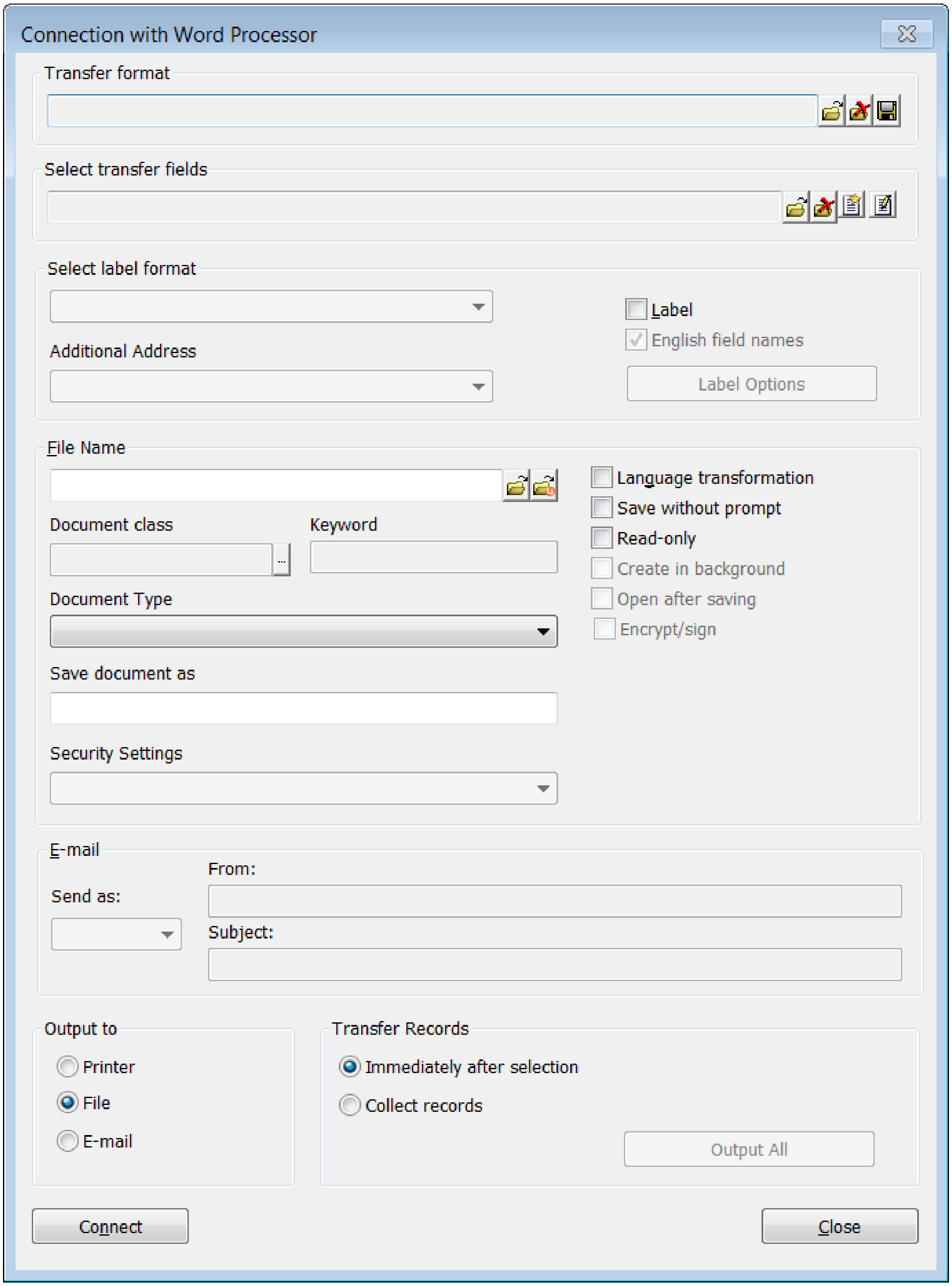
An additional **{!Empty}** variable is added. Result: **{FI2*Company}{!Empty}**

If the transferred record does not contain a company name, a blank line is not inserted.

Defining Transfer Formats

To create transfer formats for (bulk) letters:

1. Select **Extras > Connection with Word Processor** from the menu.



2. Click (**Load**) next to the **File Name** field. Select the document created earlier.

Note: The target document may not contain any merge fields at this point.

If the document is stored in Aurea.CRM's document repository, you can click  (**Select Document**) or enter the ID of the document in this field.

If you use a .docm file stored in Aurea.CRM's document management system, you cannot save once the mail marge fields have been inserted. To avoid this issue, add ".docm" as a file type that should not be deleted (see Configuration Info Area in the *CRM.core Administrator Guide* (**Documents** category, **File types to retained** option). You can then save the DOCM file locally and upload it to Aurea.CRM manually.

Enable the **Language transformation** check box if you want catalog values to be translated into the language entered in the person record.

3. If you are creating a transfer format for a single letter, you can choose whether and how to save the document. Mail merges are not saved in Aurea.CRM's document management system.

   - Enable the **Save without prompt** option to automatically save the letter in Aurea.CRM's document management system after transferring the data, see Single Letters and Document Management. The letter is saved using the document's name as a general document. You can additionally specify a **Document class** and **Keyword**.
   - Enable the **read-only** option to save the letter as read-only.
   - To save the letter under a different name, enter the name in the **Save document as** field. Enter the file name without an extension: The **Document Type** extension is used. If no type is selected, the document's file extension is used instead. You can also use variables for the document name.

Note: These options are not available if you select **E-mail** under **Output to**.

4. To encrypt or sign a document, enable the **Encrypt/sign** check box and select an option from the **Security Settings** drop-down list.

This option is only available if encrypting documents has been enabled in the **Configuration** info area, see Configuration Info Area (**Security** category, **Single letter** option)in the *CRM.core Administrator Guide*.

a. If you want to use transfer fields, click (**Load**) under **Select transfer fields** and select a format from the list.

   - Click (**Delete**) to remove a selected format.
   - Click (**New**) to define a new transfer fields format, see Transfer Fields on page 79.
   - Click (**Edit**) to edit a selected transfer fields format.

5. Enable the **Label** check box if you wish to create a letterhead or output labels:
   - The label entered in the person record is used.
   - If no label is entered in the person record, the company label is used instead.
   - If you select a label in the **Select label format** field, the label is used for all records, even those for a label has already been entered.
   - If no label is found, the first label available from the **Select label format** field is used.

   Use the Other Addresses field to select a different address, e.g. a billing or delivery address. If the specified address type has not been entered for a record, the company address is used instead.

   Use the **Label Options** button to define or edit labels.

   Enable the **English field names** check box to transfer the label fields (**Addr.0**, **Salutation**) in English. This ensures that the letter is generated correctly with other Aurea.CRM language versions.

6. Determine the output destination under **Output to**:
   - **Printer:** The letter is sent to the printer.
   - **File:** The letter is opened as a file. You can choose to save the resulting document, see Single Letters and Document Management.
   - **E-Mail**: The letter is sent as an e-mail (an e-mail client must be configured in the **Configuration** info area, see Configuration Info Area (General Settings category, **E-mail Client** option)in the *CRM.core Administrator Guide.*

Note: You can only output single letters as e-mails, see .Creating a Single Letter If you wish to send out a mass mailing by e-mail, you can do so as part of a marketing activity, see Execution (Marketing Activity) on page 200.

7. If you select **E-mail** under **Output to**, you can determine the following settings in the **E-mail** pane:
   - **Send as**: Select the e-mail format (TEXT or HTML).

You can include database contents in HTML e-mails directly using specific tags, see Contents of a Mass Mailing in the *Business Logic Manual.* In this case, you do not need to define transfer fields.

8. Click on (**Save**) under **Transfer format** to save the transfer format (format type "Word processor").
9. Click **Close**.

Note: Before you can generate a single letter or mass mailing using a transfer format that contains a label and/or transfer fields, you need to create a template that links data from Aurea.CRM with your document, see Establishing a Connection with the Word Processor.

Transfer format based on queries (created in Aurea.CRM web) instead of transfer fields **cannot be used in Aurea.CRM win** to generate single letters and mass mailings.

File Name Variables

You can define variable document names using placeholders enclosed in {}. These placeholders are replaced with the actual values when creating the letter.

The following placeholders are available:

Placeholder	Description
documentclass	The document class as defined in the word processor format.
extension	The extension (e.g. ".pdf") for the MIME type (e.g. "application/pdf") of the document. If no mime type is defined the extension of the document template is used. If the document template has no extension ".docx" is used as a fallback. The placeholder **{extension}** includes a leading ".".
formatname	The name of the word processor format.
infoareaid	The info area ID of the record the letter is created for.
keyword	The keyword as defined in the word processor format.
now	The current time (HHMMSS).
recordid	The record ID of the record the letter is created for.
rep	The rep name of the current user.
repid	The rep ID of the current user.

Placeholder	Description
tablecaption[:name]	The table caption of the record the letter is created for. Optionally the name of a custom table caption can be specified (separated by a colon): **tablecaption:<TableCaption_Name>** **Note:** This placeholder is supported in Aurea.CRM web only.
template	The file name of the template document (without extension).
today	The current date (YYYYMMDD).
user	The login name of the current user.

Examples:

Definition	Result
{template}_{tablecaption}{extension}	Invitation_Mr. John Doe.pdf
{formatname}{repid}	Offer100026.docx
order_{today}	order_20120531.docx

Establishing a Connection with the Word Processor

To establish a connection with your word processor and create the document template:

1. Select **Extras** > **Connection with Word Processor** from the menu.
2. Load a transfer format.
3. Click **Connect**.The letter document entered in the **Document** field of the transfer format (word processor format) is opened in the background.
4. Click on **Close** in the **Connection with Word Processor** dialog box.
5. Select **Extras > Transfer to Word Processor** from the menu. (If Microsoft Word displays an error message at this stage, confirm this message with **OK**.)A second document is generated in the background.
6. Close this second document without saving it.
7. Switch to the original document in Microsoft Word.
8. Click on  (**Mailings** > **Insert Merge Fields**).The address placeholders (**Addr.0-9**, **Salutation** and placeholders for transfer fields) are displayed.

9. Add the address fields (e.g. **Addr.0** to **Addr.6**) one after another to the appropriate place in the document.

   The address placeholders form a block. Each line of the address in the bulk letter has the same length so that the transferred address fits inside a standard envelope window.

   If a line in the address is too long, it is output over several lines. No blank lines are added for unused address fields.

   The greeting defined in the label replaces the **Salutation** merge field.

10. Save the document and leave it open. It is now defined as your document template used to generate letters.

    Note: To check the spelling of letters, make sure that the **Do not check spelling or grammar** check box in Microsoft Word is disabled (in the language settings), at least for those portions of the document you wish to check.

    To save DOCM files stored in Aurea.CRM's document management system, DOCM files need to be defined as files that are not deleted, see Configuration Info Area (**Documents** category, **File types to be retained** option) in the *CRM.core Administrator Guide.*

11. Return to Aurea.CRM win.
12. If the document template is stored in Aurea.CRM's document management system, you are asked whether the file should be saved. Select **Yes**.
13. Select **Extras > Transfer to Word Processor** from the menu to test the transfer.A letter is generated for the current record. Two documents are now open in Microsoft Word: the template and the letter.
14. Select **Extras > Connection with Word Processor** from the menu of Aurea.CRM. Click on **Disconnect** to terminate the connection.The template in Microsoft Word is closed.
15. Close the dialog box.

You can now use the transfer format and document template to generate mail merges and single letters, see Single Letters on page 328 and Mail-merge Letters on page 331.

Single Letters

Learn how to create single letter and manage it.

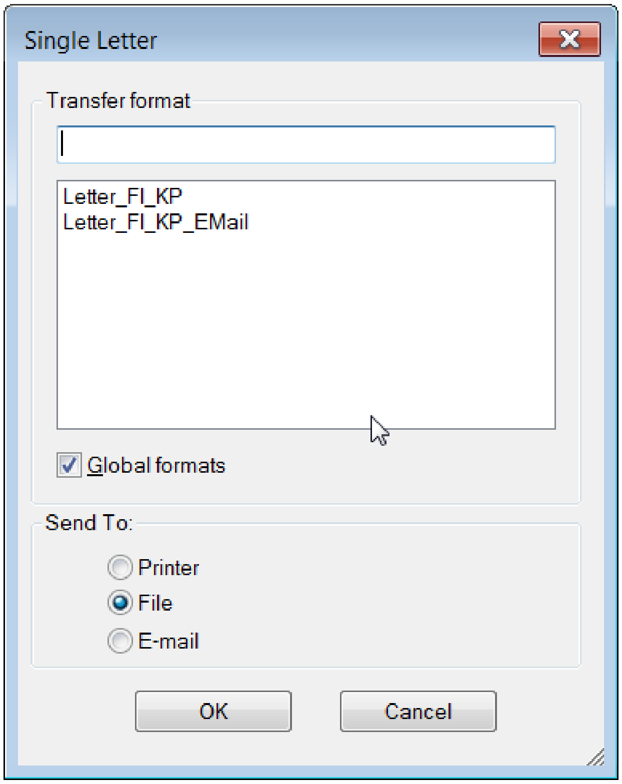
Select **File > Single Letter** from the menu. The current record is output to a temporary control file, the template is opened in your word processor and then merged with the record to create a mail-merge letter. Afterwards the connection is terminated.

This method is useful for quickly creating single letters or e-mails addressed to the current company. You can generate single letters from other info areas as well, see Transferring Rep Data.

Creating a Single Letter

To create a single letter:

1. Switch to the desired record.
2. Select **File > Single Letter**.



3. Select a transfer format.
4. Determine the output:
   - **Printer:** The letter is sent directly to the printer.
   - **File**: The letter is opened as a file.
   - **E-mail**: The letter is sent as an e-mail. (You need to specify the client used to send e-mails in the **Configuration** info area, see Configuration Info Area (**General Settings** category, **E-mail Client** option) in the CRM.core Administrator Guide.) If the e-mail is sent from the **Company+Person** level, an activity record is additionally added containing the contents of the e-mail.

   Note: You can prevent activity records from being added automatically, see Configuration Info Area (**Word Processor** category, **Do not add activities when sending e-mails** option) in the *CRM.core Administrator Guide*.

   If the e-mail is sent as HTML, a customer document is added containing the contents of the e-mail.

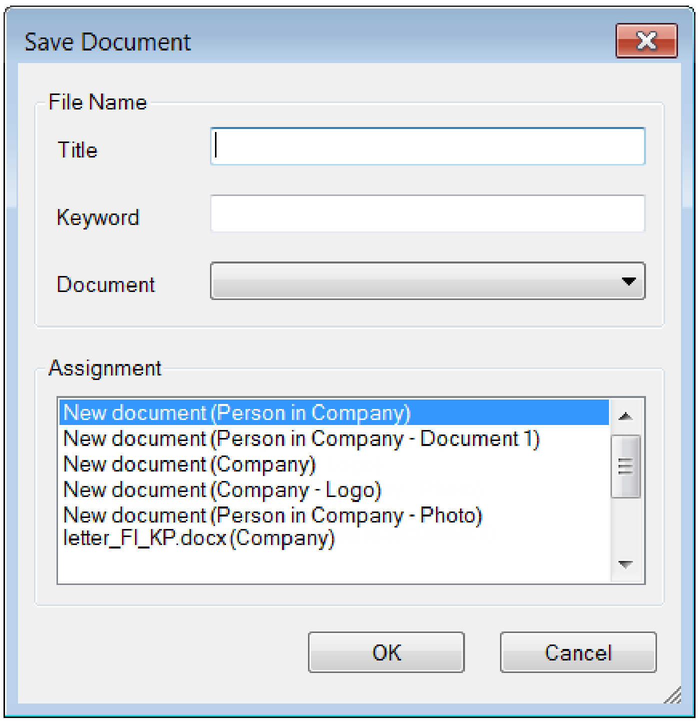
5. Confirm with **OK**.The single letter is transferred to the word processor or mail client.
6. You can save single letters in Aurea.CRM's document management system, see Single Letters and Document Management.

Single Letters and Document Management

After creating a single letter, you are asked whether you wish to save the document in the Aurea.CRM database.

1. Click the **Yes** button to save the document in the database.

   The dialog box used to save the document is displayed.



2. Enter a **Title** and **Keyword** stored in the database along with the document.
3. Determine where the document should be saved under **Assignment**:
   - **New document (<Info Area>)**: A document link is added to the current record. The document is displayed in the **Document Overview** for this record, see Document Records on page 238. If a link to the **Company/Person** info areas is present from the current context, an additional document link is added to the company or person.
   - **New document (<Info Area> - <Field Name>)**: An entry is displayed in the list for each empty document field in the current record (in this case the **Document 1** field in the **Person in Company** info area). Select an entry to save the document in this document field.

Note: You can prevent document fields in the **Person** or **Company** info areas from being listed using configuration entries, see Configuration Info Area (**Documents** category, **No company fields/No person fields** options) in the *CRM.core Administrator Guide.*

---

4. Confirm with **OK**.
5. If you have chosen to replace an existing document under **Assignment**, a message is displayed, prompting you to confirm this.

   Click on **Yes** to overwrite the existing document. Click on **No** to only replace the document in the document field; in this case, both documents are still accessible from the **Customer Document** info area.

   A document record containing the single letter is generated. The **Document Class Title** and **Keyword** fields are transferred from the **Save Document** dialog box. The **Format** and **Application** fields, as well as the two key fields are filled in automatically.

   Enable the **Save without prompt** option in the transfer format to automatically save the single letter in Aurea.CRM's document management:

   - A document link is created for the record from which the letter is generated. The document is saved in displayed in the **Document overview** for the record, see Document Records on page 238.
   - If a link to the **Company/Person** info areas is present from the current context, an additional document link is added to the company or person.
   - If the single letter is generated from a level with several info areas, but with no link to **Company/Person**, a document link is added for the root info area in the transfer fields format.
   - If non transfer fields format exists, the document link is added to the level's parent info area.

   Note: All documents stored in the database using a document link are saved in the **Document** info area.

   You can control the automatic creation of additional document links for companies or persons in the configuration settings, see Configuration Info Area (**Documents** category, **No document link for companies/persons** options) in the *CRM.core Administrator Guide.*

   Your administrator can prevent you from adding document links by denying access to the Document Link info area (D3), see Rights in the *CRM.core Administrator Guide.*

Mail-merge Letters

Learn how to create and disconnect mail merges.

Mail-merge letters can be:

- Generated as part of a marketing activity, see Executing Marketing Activities on page 212.
- Generated directly from an info area, either individually or as a collection of records.

Creating a Mail-merge Letter

To transfer multiple records from a list, selection or condition to the word processor:

1. Select **Extras > Connection with Word Processor** from the menu.
2. Load a transfer format.
3. Select **Immediately after selection**.
4. Click on **Connect**.
5. Click on **Output All**.

   Depending on your settings when you accessed the menu command, the following records are transferred to the word processor:

   - All records in the list starting from the currently selected record.
   - All records in a selection
   - The records that meet the conditions defined.

   Note: Not all conditions are applied, see Transfer Conditions.

   Word is started in the background. The following documents are created and opened:

   - The template entered in the File Name field.
   - The temporary control file nnmtmp.doc, which is stored in the user's directory and contains the field data. "nn" is replaced by the number of the level the transfer is initiated from.

   The merge fields in the template are replaced with data from Aurea.CRM.

   The number of records that have been processed is displayed on the **Output All** button. You can stop the process by pressing Esc.

   To output records that are not part of a selection or that fulfill a condition, you need to collect the field data in a temporary file and then transfer it to the word processor:

1. Select **Extras > Connection with Word Processor** from the menu.
2. Load a transfer format.
3. Select **Collect records**.
4. Click on **Connect**.
5. Close the dialog box.
6. Select the individual records for which the mail merge should be generated.
7. Select **Extras > Transfer to Word Processor** for each of these records. The records are collected.
8. Once you have selected all the records, select **Extras > Connection with Word Processor** from the menu.
9. Click on the **Output Collected** button.

All the collected data is now transferred to the word processor and the serial letter is generated.

Note: Mail merges created with Microsoft Word cannot be printed using the **Pages** option in the print dialog box (e.g. pages 10-14).

Terminating the Connection

Once you no longer need the connection, you can disconnect from your word processor:

1. Select **Extras > Connection with Word Processor** from the menu.
2. Click on **Disconnect**.
3. Close the dialog box.

Spreadsheet

Learn how to transfer data to spreadsheet.

You need to enter your spreadsheet application before you can transfer data to it.

Select **Extras** > **Document Directories** from the menu and select the version of your spreadsheet application.

Transfer to Spreadsheet

Preparation:

- Define transfer field formats containing any info areas and fields that you wish to transfer to the application, see Transfer Fields on page 79.

Note: The **Max. no. records** field in the **Define Transfer Fields** window must be left blank when transferring data to your spreadsheet.

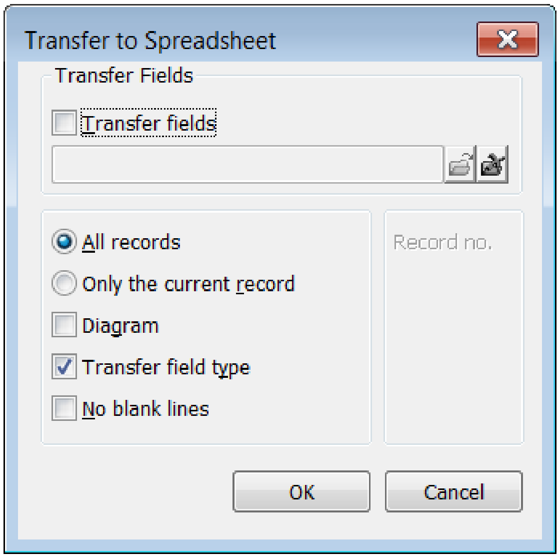
- If you do not define any transfer fields, the current list view is transferred. Switch to the desired info area, and define or load the desired list view (**View > Define List Format** and **View > Load List Format** options)
- Define or load any conditions or selections to restrict the data, see Defining Conditions on page 55 and Defining a Selection on page 94. Note that not all conditions are applied, see Transfer Conditions.

To transfer data to a spreadsheet:

1. Select **File > Transfer to Spreadsheet** from the menu, or click (**Excel**).

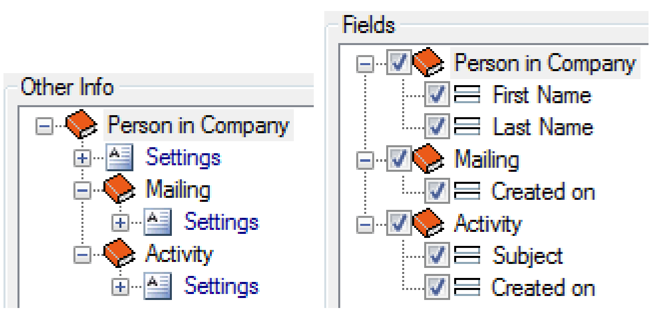
Note: Your administrator determines (in the desktop definition) which levels include the (**Excel**) button, see **Header Tab** in the Aurea.CRM win Administrator Guide.

The **Transfer to Spreadsheet** dialog box is displayed:



2. You have two options when transferring data:
   - Enable the **Transfer fields** check box and load a format: all fields defined in the transfer field format are transferred.

     Example: Activities and mailings for **Person in Company**:

   - If the Transfer fields check box is disabled, all fields in the current list view are transferred. All records that are currently displayed in the list are transferred. (For child info areas this may be affected by whether you have enabled Data > Company-Related Info or Data > Person-Related Info.) If a total line is included in the list, it is also transferred.
3. Enable **All records** to transfer all records in the list. Enable **Only current record** to only transfer the record currently selected in the list.
4. Enable the **Diagram** check box if you want to create a diagram in addition to the table.

5. The **Transfer field type** option is enabled by default. This option determines that data are transferred to Excel using formatting based on the field type:
   - Telephone numbers as text (leading zeros are retained)
   - Percentages as percentages
   - Floating point numbers as floating point numbers
   - All other numeric fields as integers
   - Date fields as dates, if entered in a valid format, otherwise as text
   - Time fields using the format "hh:mm:ss"
   - All other fields as text
6. Enable the **No blank lines** option to determine that the parent record should be transferred prior to each dependent record.

A	B	C	D	E
KPFirstName	KPLastName	BRCreatedon	MASubject	MACreatedon
Simon	Svendsen	05.11.2013		06.05.2013
Simon	Svendsen		Jour fixe	10.12.2012
Simon	Svendsen		Team meeting	12.12.2012

   If this option is disabled, blank lines are generated instead.

A	B	C	D	E
KPFirstName	KPLastName	BRCreatedon	MASubject	MACreatedon
Simon	Svendsen	05.11.2013		06.05.2013
			Jour fixe	10.12.2012
			Team meeting	12.12.2012

7. Click **OK**.

Aurea.CRM opens your spreadsheet application and enters the field contents in a table. The **Record no.** field displays the number of records transferred to the spreadsheet.

The field name is transferred to the table as a column header.

E-mail Clients

You need to specify your e-mail client in the Configuration info area.

For further details, see Configuration Info Area (**General Settings** category, **E-mail Client** option) in the *CRM.core Administrator Guide.*

If you wish to send e-mail via SMTP, you or your administrator also need to enter your connection settings, see Lotus Notes Integration and SMTP Connection Settings in the *CRM.core Administrator Guide.*

Lotus Notes Integration

Lotus Notes integration takes place via an API.

Sending E-mails using Lotus Notes

To send an e-mail using Lotus Notes:

1. Select the desired record in the **Company+Person**, **Activity** or **Note** etc. level. An e-mail address must be entered for the company, person or rep, otherwise no e-mail address is transferred to your client.
2. Select **File** > **E-mail** from the menu, or click on an e-mail address in the rep, company or person record.

   If the current record is linked to one or more documents a message is displayed. You can determine whether to include the documents as attachments.

   The **Domino - Login** dialog box is displayed for you to enter the password.
3. Enter your Lotus Notes password in the **Password** field.
4. Enable the **Store credentials** check box so that you are not prompted to enter your password again in all areas of Aurea.CRM from which you can send e-mails via Lotus Notes. Your password is stored in encrypted form in the **domino.cgf** file in your user directory.

   Note: Click on the **Advanced** button to display the **Home/Mail server** and **Mailfile** fields. You should not enter anything in these fields as they are automatically entered by Aurea.CRM when the connection with Lotus Notes is established. If you have enabled the **Store credentials** check box, these fields are saved in addition to your Lotus Notes password.

5. In case Lotus Notes is not open, the application is started automatically and you are prompted to re-enter your Lotus Notes password.

   The **New Memo** window is displayed in Lotus Notes.

   The e-mail address of the company/person is copied from Aurea.CRM to the **To** field. If more than one e-mail address is entered in the company/person record, select the desired address from the dialog.

   If you started sending the e-mail from the **Activity** info area, the **Subject** and **Text** fields as well as any documents entered are added as attachments. The text field is also transferred from the **Note** info area, see Sending E-mails Directly from an Activity or Note on page 341.
6. Compose the e-mail.
7. Click on **Send**.

Microsoft Outlook and Microsoft Exchange Integration

E-mails are sent via MAPI when using Microsoft Outlook or Microsoft Exchange.

Sending E-mails using Microsoft Exchange

To send an e-mail from Microsoft Outlook or Microsoft Exchange:

1. Select the desired record in the **Company+Person**, **Activity** or **Note** etc. level.An e-mail address must be entered for the company, person or rep, otherwise no e-mail address is transferred to your client.
2. Select **File** > **E-mail** from the menu, or click on an e-mail address in the rep, company or person record.If the current record is linked to one or more documents a message is displayed. You can determine whether to include the documents as attachments.

   If several profiles are available and no default profile has been defined, then you can select a profile.

   a. Select the desired profile.
   b. Enter your password in the Password field.
   c. Enable the Store credentials check box to save the selected profile and password in encrypted form under mail_mapix.cfg in your user directory. In future you are no longer be prompted to enter your password and profile data in all Aurea.CRM's info areas that allow you to send e-mails.

   A window is opened in your e-mail client allowing you to compose a new e-mail. The e-mail address of the company/person is transferred from Aurea.CRM to the **To** field. If more than one e-mail address is entered in the company/person record, select the desired address from the dialog.

   If you started the transfer process from the **Activity** info area, the **Subject** and **Text** fields as well as the documents entered are copied as attachments. The text is also transferred from the **Note** info area, see Sending E-mails Directly from an Activity or Note.
3. Compose the e-mail.
4. Click on **Send**.

Sending E-mails Via SMTP

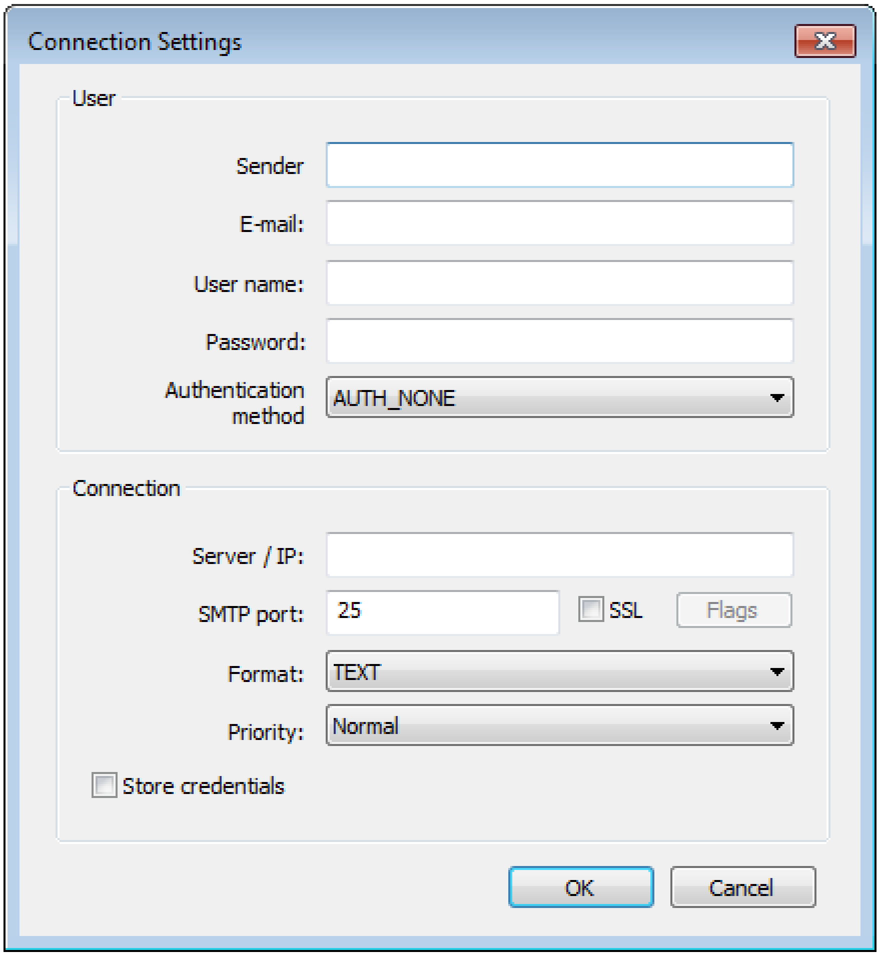
Learn the settings for sending email via SMTP.

To send an e-mail via SMTP:

1. Select the desired record in the **Company**/**Person**, **Activity** or **Note** etc. level.An e-mail address must be entered for the company, person or rep, otherwise no e-mail address is transferred to your client.
2. Select **File** > **E-mail** from the menu, or click on an e-mail address in the rep, company or person record.

   If the current record is linked to one or more documents a message is displayed. You can determine whether to include the documents as attachments.

   When first sending an e-mail via SMTP, the following dialog box is displayed:



Note: Your administrator can save the SMTP connection settings in the database, see SMTP Connection Settings in the *CRM.core Administrator Guide*. In this case, the dialog is not displayed.

3. Enter the desired connection settings. If you are unsure of your login details, contact your network administrator.
   - **Sender:** Your name
   - **E-mail:** Your e-mail address

     Note: You can send e-mails on another rep's behalf by entering another **Sender** and another e-mail address. This only works if you have the rights required to send e-mails using another name.

     - **User name:** SMTP user name
     - **Password:** SMTP password
     - **Authentication method (optional)**:

- **Login method**(possible values): `AUTH_NONE`, `AUTH_CRAM_MD5`, `AUTH_LOGIN`, `AUTH_PLAIN`, `AUTH_NTLM`
- **Server / IP:** Name or IP address of the SMTP server
- **SMTP port:** SMTP port number; **Default**: 25
- **SSL:** Enable the SSL check box to encrypt your e-mails using SSL. Click on Flags to determine the settings used to authenticate the certificate. o Format: the format of the e-mail (TEXT or HTML)
- **Priority:** The e-mail's priority

Note: Your administrator can define SMTP default settings in the global mm.ini file, see [SMTP] in the *Aurea.CRM win Administrator Guide.*

4. Enable the **Store credentials** check box to save these settings. The dialog box is then no longer displayed when you next send an e-mail. Your data is stored in encrypted form in the file **smtp.cfg** in your user directory, and is used from then on.

   You can open the **Connection Settings** dialog at any time by holding down Shift while selecting **File** > **E-mail** from the menu.

5. Click **OK**.

   The **Send SMTP e-mail** dialog box is displayed. The e-mail address of the company/person is copied from Aurea.CRM to the **To** field. If more than one e-mail address is entered in the company/person record, select the desired address from the dialog.

   If you started the transfer process from the **Activity** info area, the **Subject** and **Text** fields as well as the documents entered are copied as attachments. If you started the transfer process from the **Note** info area, the text of the note is transferred, see Sending E-mails Directly from an Activity or Note on page 341.

6. Compose the e-mail.

7. Click on  (**Send**).

Adding E-mails as Activities

You can assign incoming e-mails to an existing company or person in the Aurea.CRM database.

To do this, the e-mail address of the sender must already be stored in the **Company/Person** record. An activity record is created for the company or person.

Filtering E-mails

To filter the e-mails in your inbox:

1. Select **Extras > E-mail as Activity** from the menu.

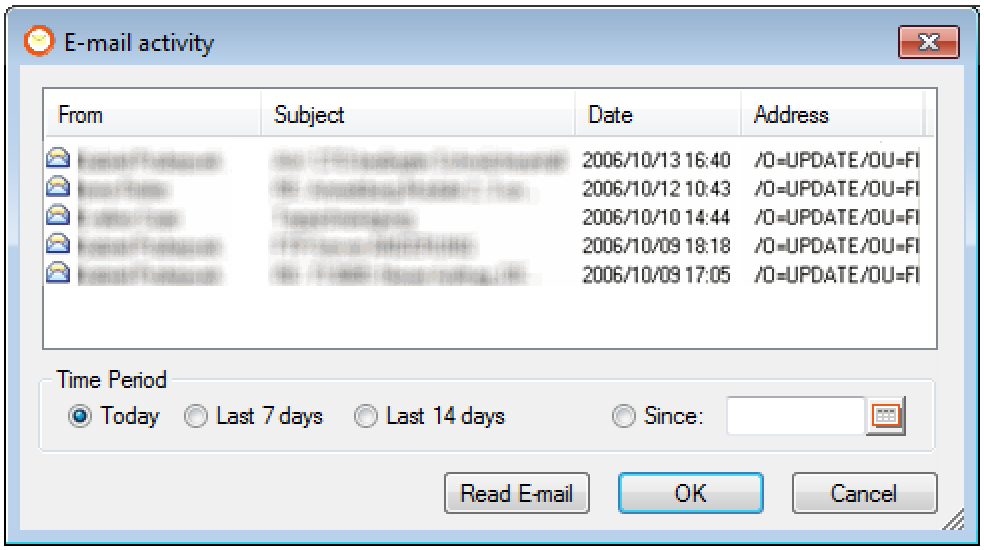
   The **E-mail Activity** dialog box is displayed.

   Note: By default, the profile defined under **Start** > **Settings** > **Control Panel** > **Mail** is used. If no default profile has been defined, then a dialog box is opened and you can select the desired profile.

   ---

2. Select the time period when the e-mail you want to import is received. Click the **Read E-mail** button.

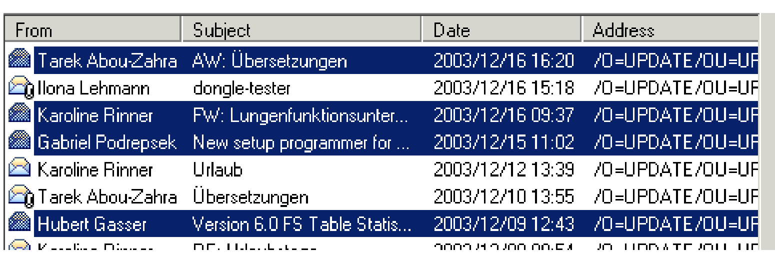
The e-mail messages is loaded. This can take a while for large numbers of e-mails.



Assigning E-mails to Activities

To select the e-mails you would like to add activity records for:

1. Select the e-mail(s) you want to turn into activity records by clicking each one. Click an entry again to deselect it.



Note: It is possible to save the same e-mail on different days. In this case new activity records are created containing identical data.

---

2. Click **OK**.

Aurea.CRM searches through its database looking for identical e-mail addresses entered in **Company** and/or **Person** records.

Note: Addresses and telephone numbers are saved automatically in the **Tel.No./E-mail** info area. Select **Fill** from the context menu to update the entries in this info area if problems occurred when searching.

3. Click the **OK** button in the "Done!" message box to create the relevant activity for the existing e-mail addresses.

In the corresponding activity record, the **Type** field has prepopulated value **E-mail**.

At the end of the process, **Done** is displayed.

Sending E-mails Directly from an Activity or Note

Your administrator can configure your e-mails to be sent in the HTML format.

This setting is done in the **Rights** > **configuration** > **Connection Setting for SMTP (in General Settings)** > **Format** .

Note: Ensure that you have Microsoft Word installed on your system as Aurea CRM Win uses Word to edit e-mails in the HTML format. If Word is not installed you encounter the error message **Cannot initialise word application**.

To send e-mails directly from an activity record:

1. Switch to the activity record.
2. Enter the e-mail's text in the **Text** field.
3. Enter the e-mail's subject in the **Subject** field.
4. Save the activity.
5. Select **File** > **E-mail** from the menu. Your e-mail client is opened.
   - The To field contains the e-mail address of the company or person. If several e-mail addresses entered for a company or person, select the desired address from the dialog.
   - All activity participants with the status **Required** (apart from yourself) are also entered in the To field.
   - All optional activity participants are entered in the Cc field.
   - The Subject field contains the subject entered in the activity.
   - The body text contains the text in the note or activity.
   - If the Activity/Note is linked to one or more documents a message is displayed. You can determine whether to include the documents as attachments.
6. Edit the e-mail and send it.

Sending an e-mail from a note is similar. However, only the text and the e-mail address of the parent company/person are transferred to the e-mail.

Sending Records as a Link

You can send e-mails containing links to records in Aurea.CRM, e.g. a sales rep can send a status report concerning a visit to their superior.

The recipient can then click on the link in the e-mail's body text and the corresponding record is displayed in Aurea.CRM win, Aurea.CRM web or CRM.mobile. These e-mails are generated in HTML format irrespective of your current e-mail settings.

Buttons and menu entries can be configured in the desktop settings to provide quick access to these functions, see Desktop in the *Aurea.CRM win Administrator Guide.*

Requirements:

- Aurea.CRM win: The station number should be identical for both sender and recipient, otherwise there could be problems with the keys for records that have not been communicated.
- Links to Aurea.CRM applications other than Aurea.CRM win need to be configured first, see Configuration Info Area (**Links** category)in the *CRM.core Administrator Guide.*

To send a record as a link:

1. Switch to the desired record, and select **Edit > Send Record as Link to** from the menu.
2. Select the recipient from the sub-menu. You can select to send the record to a rep, a group, a superior or a deputy.
    - The **Rep...** menu option opens the **Select** dialog box, where you can select the desired rep(s).
    - If you select the **Rep** menu option, then the e-mail is sent to all reps that are entered in the current record.
    - If you select **Group** then the e-mail is sent to the group's e-mail address. If no e-mail address has been entered for the group, then the e-mail is sent to all the group members' individual e-mail addresses.
3. If the current level includes more than one info area, then a dialog box opens and you should select an info area, e.g. the **Activity Participation** level.

    Select the desired info area and confirm with **OK**.
4. If documents have been added for the selected record, a dialog box is displayed allowing you to select the desired document.

    Select the document. Alternatively, enable the **Select all** check box to send all documents.
5. Confirm with **OK**.

The e-mail is displayed in your mail client, where you can edit and send the mail.

The **Subject** line contains the name of the info area and the relevant record's reference.

The e-mail's body text contains the hyperlink to the record. If links to products other than Aurea.CRM win have been configured, links to the record in Aurea.CRM web or CRM.mobile are also included.

6. Edit and send the e-mail.

If the recipient clicks on the hyperlink, the corresponding Aurea.CRM application is started automatically and the record is displayed.

Copying Records to the Clipboard

Learn how to copy records to the clipboard.

1. Switch to the desired record, and select **Edit > Copy Link to Clipboard** from the menu.
2. If the current level includes more than one info area, then a dialog box opens and you should select an info area, for example the **Activity Participation** level. Select the desired info area and confirm with **OK**.
3. The link is copied to the clipboard and can be pasted into other Windows applications, Aurea.CRM's general toolbar (see **Accessing Records** in the the Aurea.CRM win Administrator Guide) as well as into any Aurea.CRM field of type **Hyperlink**.

Data Transfer Tips

This topic has some tips for data transfer on Aurea CRM.Win.

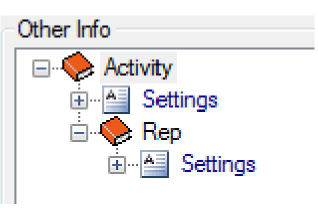
Transferring Rep Data

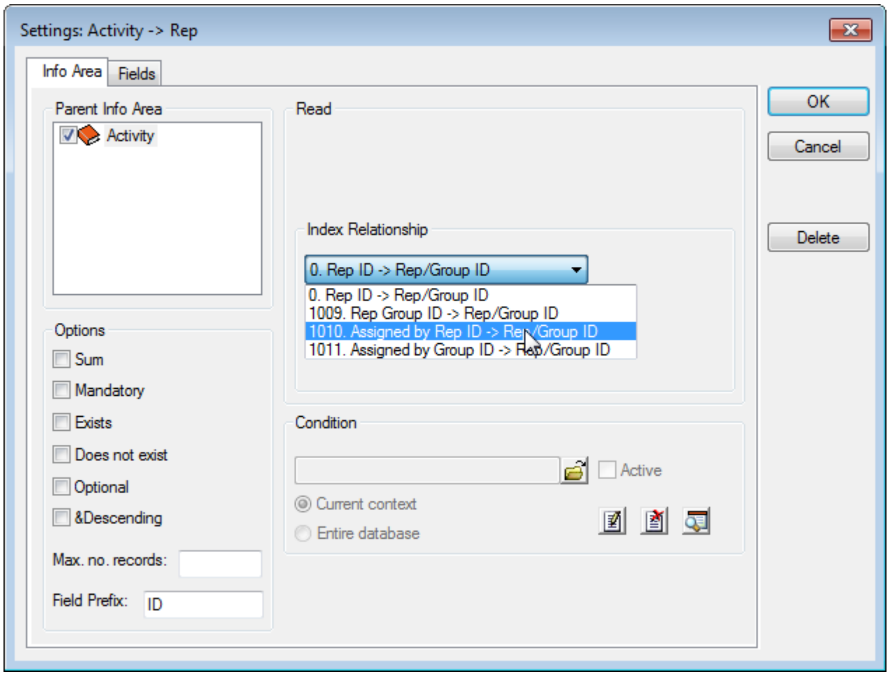
Rep data (e.g. name, e-mail address, telephone extension etc.) can be included in single letters and mass mailings by defining transfer fields, see Defining Transfer Fields on page 271. Depending on the parent info area and the selected index relationship, these could include data concerning the rep handling an activity, **Rep 2** entered for a company of the current rep.

Examples

To transfer data concerning the **rep handling an activity**:

Select the **Rep** info area as a child of the **Activity** info area, see Selecting Info Areas:

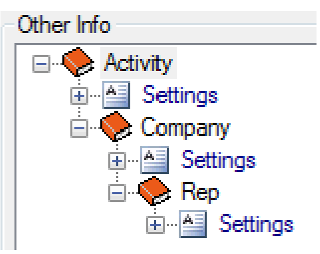


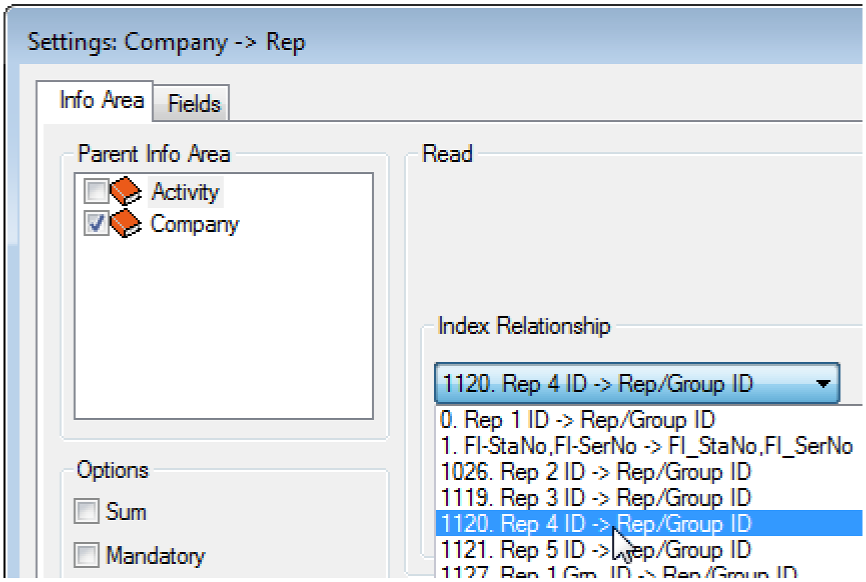


Depending on the **Index Relationship** you have selected, you can transfer the rep assigned to the activity (Rep ID), the rep that assigned the activity (Assigned by Rep ID), or the group that these reps belong to.

To transfer data concerning activities, companies and **the rep assigned to the company**:

Select the **Company** info area as a child of the **Activity** info area, and the **Rep** info area as a child of the **Company** info area:

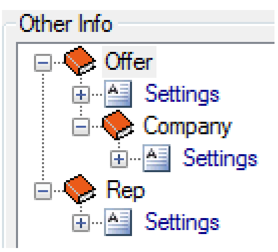




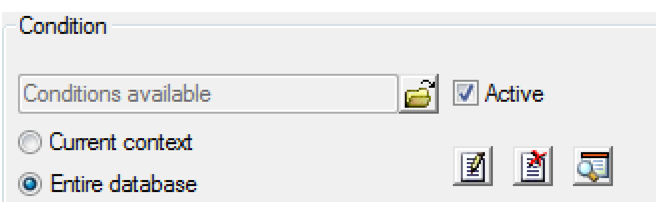
Select the rep whose data you wish to transfer under **Index Relationship**, e.g. **Rep 4**.

To transfer **data concerning the current rep**, i.e. the rep creating the mass mailing:

1. Select the **Rep** info area as an independent info area:



2. Define the condition Rep/Group ID = Current User for the **Rep** info area and enable the **Entire database** option.



Transferring Independent Info Areas

The simplest way to transfer fields from independent info areas, e.g. **Country**, **Item Master**, **Price List** etc., is to use the list view without transfer fields.

If you do use a field transfer format for this purpose, you should never include the same fields from the **Company** info area (or info areas dependent on **Company**) as in the independent info areas.

Otherwise, these fields are duplicated.

Transfer Fields and Access Rights

If transfer fields formats are sent to various users, word processor error messages might appear during the transfer.

For example, an error message is displayed whenever a user uses a transfer field format that includes fields to which the user is denied access.

Transfer Conditions

The following are taken into account when transferring data to your word processor or spreadsheet:

- The rights assigned to the user.
- The conditions in the transfer fields format defined for **any other** info areas apart from the currently active info area. i.e. if you define conditions applying to activities in the transfer fields format, then these conditions are applied if you then transfer company data.
- Conditions and autofilters that are active for the **current info area**.

This means that data that are not displayed due to active conditions are not transferred either.

The following are not taken into account when transferring data:

- Conditions in the transfer fields format defined for **the current** info area. i.e. if you define conditions applying to companies in the transfer fields format, then these conditions are not applied if you then transfer company data.
- Conditions and autofilters that are active for **any other info area than the current info area**.

Records that are not displayed due to such conditions are transferred nevertheless.