



# ConcourseSuite

Version 5.0

## User's Guide

January 2008

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# Preface

ConcourseSuite User's Guide explains the features of ConcourseSuite, an easy to use, web-based CRM system. This guide helps you understand how ConcourseSuite works and how you can use this application to improve your sales related business processes and your bottom line.

## Summary

This document consists of the following chapters:

- **Chapter 1, An Introduction to ConcourseSuite**

This chapter introduces you to the features of all modules of ConcourseSuite, information on the concept of Customer Relationship Management, and the benefits of CRM in organizing your sales and service related business activities.

- **Chapter 2, Overview of the Home Module**

This chapter helps you understand the features of the **My Home Page** module of ConcourseSuite. This chapter also provides information on using the calendar to schedule events and activities, updating personal information, and searching for data.

- **Chapter 3, Creating a Website**

This chapter helps you understand the steps to create a website for your organization. In this module, you can create, modify, and delete your websites. You can also make the website active for public view.

- **Chapter 4, Managing Leads**

This chapter helps you understand the features of the **Leads** module of ConcourseSuite which includes information on adding, searching, and importing leads.

- **Chapter 5, Managing Contacts**

This chapter helps you understand the features of the **Contacts** module of ConcourseSuite which includes information on accessing customer details and monitoring their activities, before they become accounts.

- **Chapter 6, Understanding the Pipeline**

This chapter helps you understand the features of the **Pipeline** module of ConcourseSuite which includes information on analyzing and managing revenue opportunities with your contacts and accounts.

- **Chapter 7, Managing Accounts**

This chapter helps you understand the features of the **Accounts** module of ConcourseSuite which includes information on viewing and storing customer details.
- **Chapter 8, Managing Products**

This chapter helps you understand the features of the **Products** module of ConcourseSuite which includes information on storing product details.
- **Chapter 9, Understanding Quotes**

This chapter helps you understand the features of the **Quotes** module of ConcourseSuite which includes information on generating and organizing quotes for customers.
- **Chapter 10, Understanding Communications**

This chapter helps you understand the features of the **Communications** module of ConcourseSuite which includes information on registering and scheduling promotional campaigns, which help maintain close contact with customers.
- **Chapter 11, Managing Projects**

This chapter helps you understand the features of the **Projects** module of ConcourseSuite which includes information on managing projects and inviting employees to join a project.
- **Chapter 12, Accessing the Help Desk**

This chapter helps you understand the features of the **Help Desk** module of ConcourseSuite which includes information on managing trouble tickets related to issues and resolving them.
- **Chapter 13, Managing Documents**

This chapter helps you understand the features of the **Documents** module of ConcourseSuite which includes information on managing document stores, which contain operational information.
- **Chapter 14, Managing Company**

This chapter helps you understand the features of the **Company** module of ConcourseSuite which includes information on accessing and updating employee details, such as title, addresses, phone numbers, and email addresses.
- **Chapter 15, Viewing Reports**

This chapter helps you understand the features of the **Reports** module of ConcourseSuite which includes information on viewing and adding reports in the desired categories including admin and accounts.
- **Chapter 16, Configuring the Application**

This chapter helps you understand the features of the **Admin** module of ConcourseSuite which includes information for the administrator to modify users and their roles, edit global parameters, and check the system usage.

# What is New in ConcourseSuite 5.0?

ConcourseSuite version 5.0 consists of the following additional features:

## New Features

- You can access Quick Action bar provided on the right side to view the pages where you can add leads, contacts, accounts, and so on.
- You can access approved Knowledge Base articles, if you have the correct access.
- You can receive emails in your **Help Desk Inbox**.
- You can view the sent and received emails of each ticket in the **Correspondence** tab.
- You can view a graphical representation of the module's data on the **Dashboards** page in the following modules:
  - My Home Page
  - Leads
  - Contacts
  - Pipeline
  - Accounts
  - Communication
  - Help Desk
- You can search products in the **Products** module.
- You can view the help message for each module you click.
- You can view the website map using the **Sitemap** link.
- You can create, edit, and activate a website in ConcourseSuite.
- You can import a vCard in the **Leads** and **Contacts** modules.
- Click the **Forgot Password** link on the **Login** page that sends you your password by email.
- You can view the ConcourseSuite data offline also with correct permissions.

## Updated Features

- The **Employee** module is now changed to **Company**, which contains all the employee details.
- You can now clone user roles in the **Admin** module.
- The Knowledge Base is integrated into tickets to enable ticket issues and solutions flow into the Knowledge Base for approval.
- You can now view contact icons on the **Leads**, **Contacts**, and **Accounts** details pages that are highlighted to display the contact preference.
- You can view the version and third-party information in the **About** link.

- You can create a new account while adding a lead to an account or associate it to an existing account.
- You can now define the stage of a lead. The options of the **Stage** field can be set up in the **Admin** module.
- The contact information of leads is transferred when a lead is converted to contact or account.
- You can now view the **History, Action Plans, Activities, Messages, Documents, and Opportunities** tabs on the **Leads Details** page.
- You can now assign, re-assign, convert to contact and account, and delete leads in a batch.
- You can add recipients in a group that are imported in **Contacts, Leads, or Company** (but not a combination).
- The following fields are added to Activities:
  - Start Date
  - End Date
  - Start Time
  - End Time
  - Location
  - Participants
  - Participants are Notified
- You can specify multiple search criteria per field on the **Accounts Search** page.
- You can specify date parameters using the date widget in the **Reports** module.
- The contact import name is displayed on the **Contact Details** page if the contact was imported.
- The pagination is removed from the Excel, CSV, and HTML report formats.

## Audience

This guide is written to help users, such as salespeople, analysts, and managers who intend to use ConcourseSuite.

## Contact Us

We value your feedback and comments on the document. If you have any feedback or comments on this document, send us email at [info@concourse.com](mailto:info@concourse.com). Please mention the software, version of the software, and title of the document in your message.

You can send us your comments and feedback by mail at:

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## Conventions

The following conventions are used in the document to help you identify special terms.

Convention	Usage	Example
<b>Bold</b>	The following screen elements: Tabs List Drop-down menu GUI items	Click <b>OK</b> .
<i>Italic</i>	Book titles and emphasis	Refer to <i>Concepts Guide</i> for more information.
monospace	Code samples and commands	To run the installer, enter the following command: C:\>run_installer.bat
<i>monospace italic</i>	Variable in a command or code that you may replace with other values, as required	To make a new directory, enter: C:\>mkdir <i>new_directory_name</i>
[ ]	Optional parameters	C:\>run_installer.bat [-p]
	Mutually exclusive choices in a command or code	C:\>run_installer.bat [-p   -r]





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# An Introduction to ConcourseSuite

This chapter provides an overview of the customer relationship management concepts, the advantages of using ConcourseSuite, a brief look at the various modules of ConcourseSuite, and how ConcourseSuite helps you organize your sales- and service-related business activities.

This chapter consists of the following sections:

- ❑ [Section 1.1, “What is Customer Relationship Management?”](#)
- ❑ [Section 1.2, “Understanding the Need for Customer Relationship Management”](#)
- ❑ [Section 1.3, “Features of ConcourseSuite”](#)
- ❑ [Section 1.4, “Benefits of ConcourseSuite”](#)
- ❑ [Section 1.5, “Understanding the ConcourseSuite User Interface”](#)

## 1.1 What is Customer Relationship Management?

Customer Relationship Management (CRM) is an industry term for software solutions that help organize your business through proper management of customer interactions. A CRM package helps you organize and manage all aspects of pre-sales, sales, and service relationships with your customers.

CRM itself may be divided into various categories, such as:

- Operational CRM - automates basic business processes, for example call centers, sales force automation, and supply chain management.
- Analytic CRM - supports analysis of customer behavior and utilizes the customer and product-related information present in a database for marketing activities.
- Collaborative CRM - provides constant contact with customers, whether it is through e-mail, phone, web, or in person.

A good CRM package helps you in the following ways:

- Collates vital customer information
- Tracks order history for future use
- Provides global access to customer history
- Identifies new opportunities

ConcourseSuite provides all these features.

## 1.2 Understanding the Need for Customer Relationship Management

Increasing competition and rapid advances in technology have made companies realize the importance of making customers their key focus. By focusing on customer relationships, companies can significantly enhance their ability to gain new customers, and retain existing ones. Improving customer relationships provides the following benefits to the company:

- Establish and maintain customer rapport
- Integrate processes, such as pre-sales and post-sales
- Reduction in costs, by enabling efficient and automated order handling
- Quick resolution of task related problems
- Reduction of advertising costs by replacing advertising with direct/targeted customer marketing

## 1.3 Features of ConcourseSuite

ConcourseSuite is one of the leading products in the Customer Relationship Management arena. ConcourseSuite is a customer-centric application that helps you organize your business efficiently. The key features of ConcourseSuite are:

- A complete set of modules for managing sales and customer relationships
- Combines the best features of commercial software
- ConcourseSuite is enterprise ready and its functionalities include:
  - Authentication and Encryption
  - Logging and Administration
  - Ease of Integration
  - Scalability and Portability
- A graphical installer
- A high-performance relational database
- Support for major browsers, including older versions
- Support for all major operating systems, such as MS Windows, Linux, Mac OS X, Solaris, and BSD
- A comprehensive help is provided for all the modules when the user first visits the module
- The login page provides the **Forgot Password** link that can be used to receive your password via email
- Support to work offline. When you are online, you can perform synchronization to synchronize with the server



## 1.4 Benefits of ConcourseSuite

ConcourseSuite combines the best features of open source and commercial software, as summarized in [Figure 1.1](#).

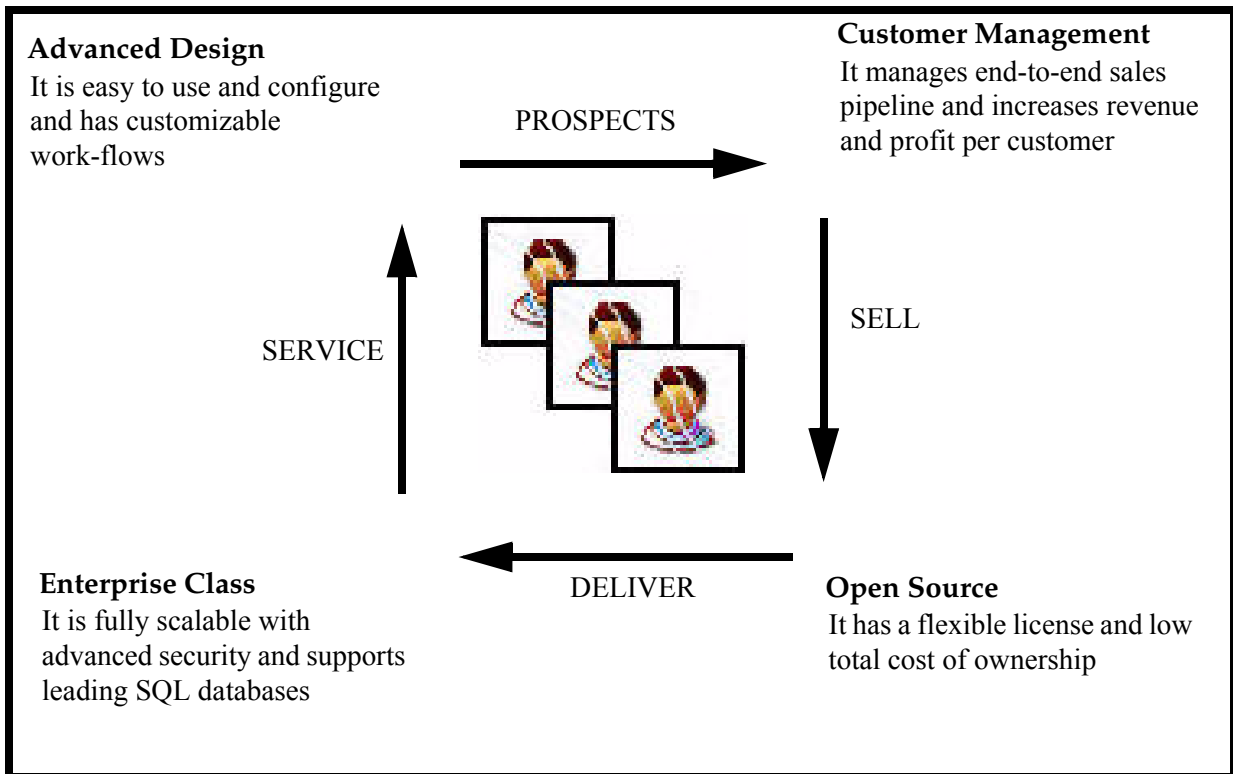


Figure 1.1 Benefits of ConcourseSuite

ConcourseSuite has the following benefits:

- Provides secure entry points to prevent unauthenticated access
- Improves performance by allowing system-level resource sharing
- Allows project planning and execution
- Allows direct database connectivity and enables you to add tables and forms using folders
- Allows you to import files in a simple Comma Separated Value (.CSV) format

## 1.5 Understanding the ConcourseSuite User Interface

The user interface of ConcourseSuite is divided into two parts, global links and module-specific links. The major part of the user interface is utilized for the module-specific links. The module-specific links are explained in individual chapters.

In this section, explanation of global links and a brief introduction to the modules of ConcourseSuite are provided.

## 1.5.1 Understanding the Global Links

Icons at the top right of the interface are the global links, as shown in [Figure 1.2](#). The following are available:

- **Website** - access the **Website** module.
- **Reports** - access the **Reports** module.
- **Admin** - perform the Administrator activities, for example, managing users and roles, systems, modules, and so on. This link is visible only if you are authorized for the **Admin** link.
- **Settings** - change your personal and access information. For more details, refer to [Section 1.5.2, “Controlling Settings”](#).
- **Print** - print a copy of the current page.
- **Help** - access help on the currently opened module.
- **About** - view the version information of ConcourseSuite and the list of third-party libraries included.
- **Logout** - logout of the application.

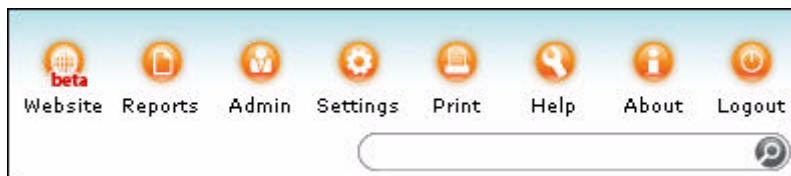


Figure 1.2 ConcourseSuite User Interface

**Custom Editor**, displayed at the bottom of the page is shown in [Figure 1.3](#).

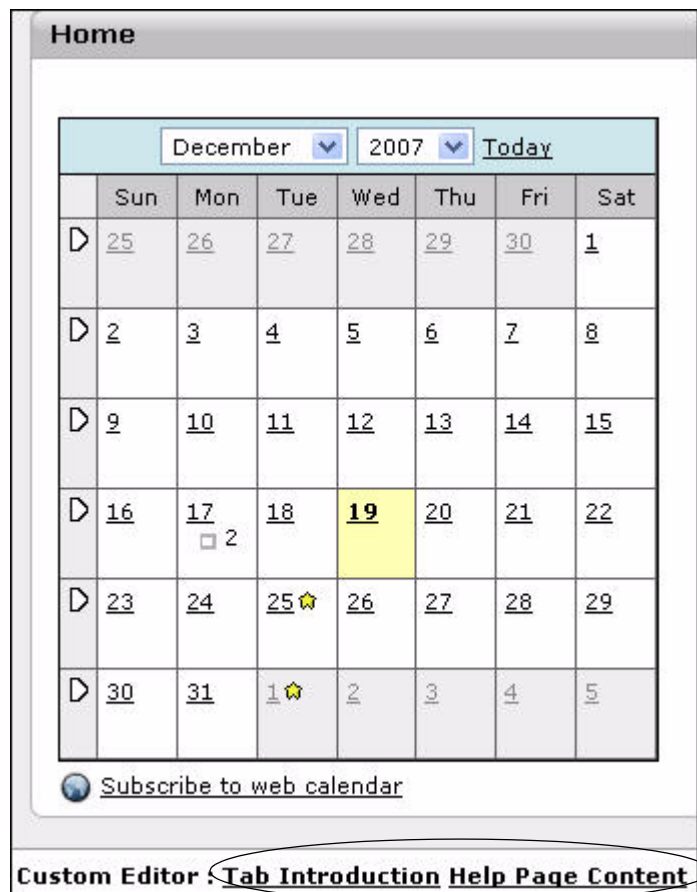


Figure 1.3 Custom Editor

The following links present under **Custom Editor** provide a description about the current page or module that is being accessed:

- **Tab Introduction** - displays introduction, general features, business rules, notes, and tips for the current page. You can add new features, business rules, notes, and tips for the page and edit the introduction, as shown in [Figure 1.4](#).

**Page Title:** Overview

**Introduction [Edit]**

You are looking at Home Page view, which has a dashboard view of all your assigned tasks, tickets, assignments, calls you have to make, and accounts that need attention. This view is based on a time selected from the calendar; by default it shows the schedule for the next seven days. You can optionally view the calendar of those below you in your hierarchy.

**General Features supported on this page [Add New]**

[Edit](#) [Del](#)  You can view the accounts that need attention

[Edit](#) [Del](#)  You can make calls with the contact information readily accessible

[Edit](#) [Del](#)  You can view the tasks assigned to you

[Edit](#) [Del](#)  You can view the tickets assigned to you

**Business Rules supported on this page [Add New]**

[Edit](#) [Del](#)  You can view your calendar and the calendars of those who work for you

**Notes on this page [Add New]**

No notes found

**Tips on this page [Add New]**

[Edit](#) [Del](#) Assign due dates for tasks so that you can be alerted

[Close](#)

Figure 1.4 The Page Description

- **Help Page Content** - displays brief and detailed description of the current module. You can edit the descriptions, as shown in [Figure 1.5](#).

<p><b>Module Name: Contacts</b> <a href="#">[Edit]</a></p> <p><b>Brief Description</b></p> <p>The purpose of this module is for the users to view contacts and add new contacts. You can also search for contacts as well as export contact data.</p> <p><b>Detailed Description</b></p> <p>The Contacts module has three main features</p> <p><b>Add:</b> A new contact can be added into the system. The contact can be a general contact, or one that is associated with an account. All the details about the contact like the email address, phone numbers, address and some additional details can be added.</p> <p><b>Search:</b> Use this page to search for contacts in the system based on different filters.</p> <p><b>Export:</b> Contact data can be exported and displayed in different formats, and can be filtered in different ways. The Export page also lets you view the data, download it, and show the number of times the exported data has been downloaded.</p> <p><b>Import:</b> The contacts importer is a sophisticated tool for importing contacts into Concourse Suite. Features include the ability to custom/auto map fields to application properties, perform error checking and examine import progress.</p> <p><b>Usability Issue:</b> After viewing a searched entity using the Spy Glass Quick Search Option in the upper right of the screen, selecting the search results option from the trails navigation bar does not display the Quick Search search results. This feature will be enhanced in an upcoming release.</p>
--

**Figure 1.5 The Module Description**

- Icons and links at the extreme right enable you to perform the following tasks:
  - Search the system
  - Take quick actions. For more details, refer to [Section 1.5.1.1, “The Quick Actions Window”](#)
  - Access your items and recent items you have visited or created

### 1.5.1.1 The Quick Actions Window

The **Quick Action** window is displayed on the right-hand side of the screen, as shown in [Figure 1.6](#).

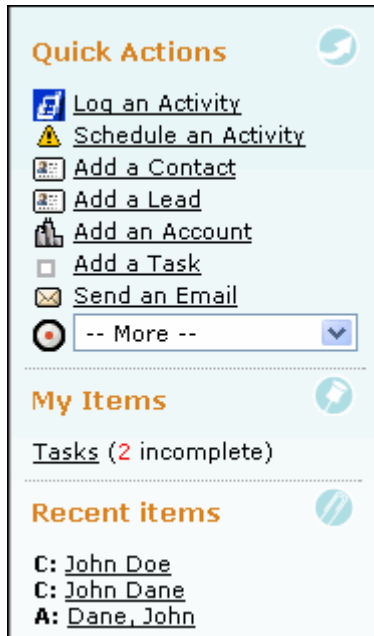


Figure 1.6 The Quick Actions Window

It contains shortcuts to frequently used actions:

- **Log an Activity** - All interactions (emails, phone calls, meetings, and so on) with prospective or existing clients are called activities. You can log and schedule an activity in ConcourseSuite. This option is available in the **Contacts**, **Pipeline**, and **Accounts** modules. For more details, refer to [Section 5.6.1, “Log an Activity”](#).
- **Schedule an Activity** - You can also schedule activities with your clients. This option is available in the **Contacts**, **Pipeline**, and **Accounts** module. For more details, refer to [Section 5.6.2, “Schedule an Activity”](#).
- **Add a Contact** - The prospective clients are contacts. This option is available in the **Contacts** module. For more details, refer to [Section 5.3.3, “Adding a Contact”](#).
- **Add a Lead** - A prospective client who might give business to the company is known as a lead. This option is available in the **Leads** module. For more details, refer to [Section 4.5, “Adding a Lead”](#).
- **Add an Account** - The existing clients of the company are referred to as accounts. This option is available in the **Accounts** module. For more details, refer to [Section 7.4.3, “Adding an Account”](#).
- **Add a Task** - You can schedule a task list for yourself for a day or a week. This option is available in the **Home** module. For more details, refer to [Section 2.6, “Managing Tasks”](#).
- **Send an Email** - You can send an email by clicking this option. This option is available in the **Home** module. For more details, refer to [Section 2.5, “Viewing the Mailbox”](#).

There are more options available in the **More** menu:

- **Add a Quote** - Quotes are the estimates of the price that you send to a perspective client for your product or service. This option is available in the **Quotes** module. For more details, refer to [Section 9.3, “Adding a Quote”](#).

- **Add a Ticket** - Whenever you want to request help from Help Desk, you must create a ticket. This option is available in the **Help Desk** module. For more details, refer to [Section 12.4, “Creating a New Ticket”](#).
- **Add an Opportunity** - An opportunity is the possibility of doing business with a person or company that you know. This option is available in the **Pipeline** module. For more details, refer to [Section 6.4, “Adding an Opportunity”](#).

## 1.5.2 Controlling Settings

The **Settings** icon enables you to control personal settings within ConcourseSuite, as shown in [Figure 1.7](#). You can select from the following options:

- Update my personal information
- Configure my location
- Change my password
- Accessing Web Folders

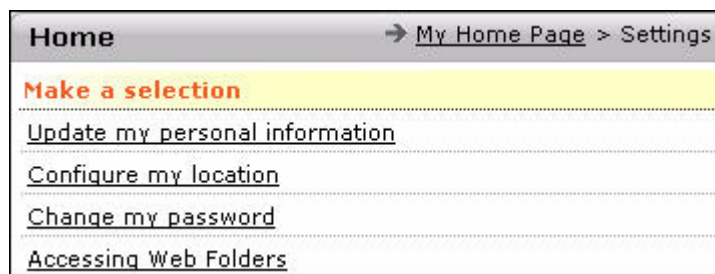


Figure 1.7 Settings

To view the **Settings** page, click **Settings** beside **Home** on the top menu, as shown in [Figure 1.8](#).



Figure 1.8 The Settings Icon

### 1.5.2.1 Editing Personal Information

ConcourseSuite allows you to change all your personal (or employee) information, including the following attributes:

- Name
- Title
- Email addresses
- Phone numbers

Click **Update** to commit or **Cancel** to quit. A sample of the information that can be modified is shown in [Figure 1.9](#).

**My Home Page** → [My Home Page](#) > [Settings](#) > Personal Information

**Details for: Asha Kadam**

First Name	<input type="text" value="Asha"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Kadam"/> *
Department	<input type="text"/>
Title	<input type="text" value="Project Manager"/>

**Email Addresses**

Email 1	<input type="text" value="Business"/> <input type="text"/>
---------	--

**Phone Numbers**

Phone 1	<input type="text" value="Business"/> <input type="text"/> Ext. <input type="text"/>
---------	--

**Addresses**

Type	<input type="text" value="Business"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text" value="-- None --"/>
Postal Code	<input type="text"/>
Country	<input type="text" value="UNITED STATES"/>

**Figure 1.9 Updating Personal Information**

### 1.5.2.2 Changing Location

The only variable you can change under **Location** is your time zone. ConcourseSuite automatically translates time to your local time zone if you have set this variable, as shown in [Figure 1.10](#).



The screenshot shows a dialog box titled "My Home Page". At the top, there are two buttons: "Update" and "Cancel". Below this is a section titled "Location Settings" with a yellow background. Underneath, there is a "Time Zone" label followed by a dropdown menu currently displaying "GMT-5 Eastern US". At the bottom of the dialog, there are two more buttons: "Update" and "Cancel".

Figure 1.10 Configure Location

### 1.5.2.3 Changing Your Password

To change the password, follow the steps given below:

1. Click **Change my password**.

The **Update Password** page is displayed, as shown in [Figure 1.11](#).

2. Type your current password and your new password twice (the second time to confirm).
3. Click **Update**.

The screenshot shows a dialog box titled "My Home Page". At the top, there are two buttons: "Update" and "Cancel". Below this is a section titled "Update Password" with a yellow background. Underneath, there are three input fields: "Current Password" (containing "\*\*\*\*\*"), "New Password", and "Verify New Password". Each input field has a red asterisk on its right side. At the bottom of the dialog, there are two buttons: "Update" and "Cancel".

Figure 1.11 The Change Password Form

### 1.5.2.4 Accessing Web Folders

To access the files and folders stored in ConcourseSuite under various modules, you must navigate to the respective modules. Click **Web Folders** to connect to ConcourseSuite externally. Once you successfully connect and authenticate yourself, you can access folders and files as if they were available on a shared network drive. You can quickly add and remove entire folders and files.

To access the web folders, you must have a WebDAV Client. Some WebDAV clients that have been used and worked with ConcourseSuite's Web Folders are:

- Mac OS X Finder

- Windows Web Folders
- Red Hat Konqueror Browser

---

**Note:** This feature uses WebDAV, a well-known protocol that allows users to access files and folders with editing and versioning capabilities on a remote server.

---

To connect to ConcourseSuite's Web Folders using Mac OS X Finder, follow the steps given below:

1. In the Mac OS X Finder, from the **Go** drop-down menu, select **Connect to Server**.
2. Select the server, as shown in [Figure 1.12](#).
3. Click **Connect** and the solution requests authentication, as shown in [Figure 1.13](#).
4. Enter the name and password and click **OK**.
5. Select the required file, as shown in [Figure 1.14](#).
6. Select the contact, whose file you want to access, from the list, as shown in [Figure 1.15](#).

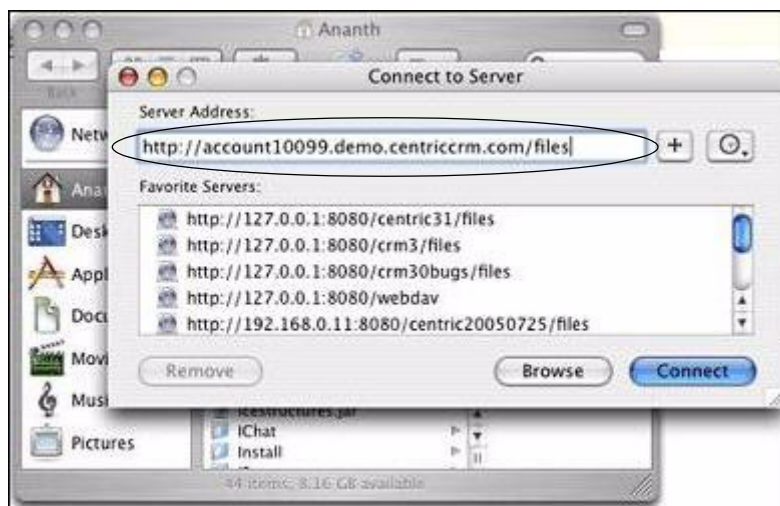


Figure 1.12 Web Folders Server



Figure 1.13 WebDAV File System Authentication

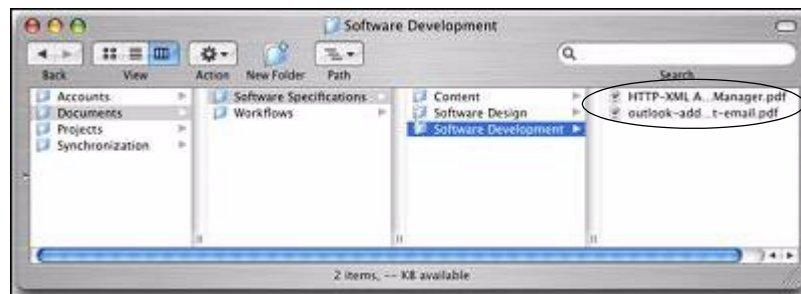


Figure 1.14 Document and File Upload



Figure 1.15 Contact vCards List

All of the top-level modules in ConcourseSuite that have documents are displayed as folders. You can navigate through each module folder to access files specific to

the module. You can download or add new files based on your read/write permissions.

The synchronization folder displays the following features:

- **Calendar**
- **Contacts**

The **Calendar** folder displays a list of the **Home** module calendars. The list essentially contains your calendar and those of employees who report to you. You can download any of the calendars for viewing them offline.

The **Contacts** folder displays a list of Contact vCards (contacts that you have access to in ConcourseSuite). You can download any vCard into your local address book application if it supports the vCard format.

## 1.5.3 Understanding the Modules of ConcourseSuite

This section provides a brief introduction to all the modules of ConcourseSuite.

---

---

**Note:** The **Admin** module is available to those users who have been assigned privileges to configure the application. If you do not view the **Admin** icon, contact your ConcourseSuite administrator for access permission. Some modules have dashboards that are setup in the **Admin** module.

---

The modules are available as tabs across the top of the ConcourseSuite interface and also at the top of the page as icons (only Home, Website, and Admin).

### 1.5.3.1 Home

**Home** enables you to get a concise view of what is happening in the organization, in a dashboard format. In this module, you can find the following information:

- Alerts and reminders of actions or tasks for which you are responsible
- Assignments you have been given
- Critical customer information, such as expiring contracts due for renewal

You can also change your password and perform other simple administrative functions. The more complex administrative functions are the responsibility of the administrator.

### 1.5.3.2 Website (Beta)

The **Website (Beta)** module enables you to create and modify website. You can create as many websites in the **Website (Beta)** module and activate one of them. You can showcase your company's profile and previous experience on the website.

### 1.5.3.3 Leads

The **Leads** module enables you to manage lead information and track prospective customers before the prospects are converted into accounts. You can import leads

into your **Leads** dashboard and also export them from the dashboard to other locations.

#### 1.5.3.4 Contacts

The **Contacts** module enables you to manage information about people you know, or have met. A contact can be an individual associated with an account or a general contact. Contacts are searchable, can have a variety of attributes and classifications, and can have a rich set of information attached to them, such as messages, activities, and opportunities. The contact record provides a chronological view of all dealings with any contact.

#### 1.5.3.5 Pipeline

The **Pipeline** module enables you to enter and analyze information about opportunities on which you and your organization are working. This module provides both dashboard and detailed views of what you think your revenue potential is in the future, and gives you a place to actively work on the closing of those opportunities.

As in all of ConcourseSuite, the system models your corporate organization, so that individuals higher in the organizational chain can view the items in the pipeline of those who report to them.

In the **Pipeline** module, you define opportunities, and save a variety of data about them, such as estimated amount, term, and probability of success. You can also attach documents, such as presentations or proposals to opportunities.

#### 1.5.3.6 Accounts

The **Accounts** module manages the information about customers. In this module, you not only view the usual name and address records, but also integrate all sales opportunities, activities, documents, contracts, assets, and help desk items pertaining to the account in one place, so you can have a holistic view of each account. For a sales organization, the **Accounts** module is the nerve center of the CRM system.

#### 1.5.3.7 Products

The **Products** module stores information about the company's products. Using this module, you can add products, their pricing details, and other information. You can also categorize products and view the list of products. You can also bulk-import product information into this module, from data files.

#### 1.5.3.8 Quotes

The **Quotes** module enables you to prepare quotations, based on your product catalog, for customers who show interest in one or more products. Quotes can go

through several revisions, so this module provides quote versioning to keep track of a quote and all its revisions.

### 1.5.3.9 Communications

The **Communications** module serves as a multi-dimensional campaign manager, enabling you to perform the following tasks:

- Interactively build a group of contacts with whom you want to communicate
- Design a multimedia message you would like to send
- Determine how (e-mail, fax, hard copy, or a combination) and when you want to send the message

Messages you send are kept in each contact's record, so you always know what each contact has been sent. Messages can also have special attachments, such as interactive surveys that you can design. The results of surveys are automatically tallied and presented.

### 1.5.3.10 Projects

The **Projects** module is a complete distributed project management system. In this module, you can build the following project-related resources:

- Project plans
- Teams
- Discussion forums
- Brainstorming lists
- Trouble tickets
- Documents

The **Projects** module allows you to build as many projects and teams as you want. You can also invite outsiders to view or contribute to projects.

### 1.5.3.11 Help Desk

The sales process is a part of the overall customer relationship. Post-sales service is critical for keeping and growing customers. The **Help Desk** module provides a powerful and complete help desk, call center, and trouble ticket solution. **Help Desk** is tied to **Accounts** and **Contacts**, and incorporates many advanced features, as listed below:

- A full action history of everything that has happened concerning a ticket.
- An activity log describing actions taken on the unresolved tickets and time spent in solving the issue.
- E-mails in your Inbox can be accessed.
- Folders where you can design new forms to collect, store, and report on information, the basic system does not contain. You can add tables to the database without programming expertise.
- Documents can be attached to help desk items.

- Help desk items can be assigned to the concerned person for resolving the issue.
- Workflow scenarios that can be generated which describe Service Level Agreements (SLAs), escalations, or other special situations.

This module also allows you to perform the following tasks:

- Easily generate maintenance notes against a contract or asset.
- Assign tasks associated with the unresolved ticket to employees.

### 1.5.3.12 Documents

The **Documents** module enables secure management of documents, using the Document Stores concept, that can efficiently store documents and categorize them for easy access. You can configure a document store to have a team of users with access permissions.

### 1.5.3.13 Company

The **Company** module stores the information about employees. You can find the following information about employees in your organization:

- Names
- Addresses
- Phone numbers
- E-mail addresses

### 1.5.3.14 Reports

The **Reports** module is a sophisticated reporting module that underlies all of ConcourseSuite. ConcourseSuite comes with 30 stock reports. This module allows you to build custom reports according to your requirements.

### 1.5.3.15 Admin

You can configure ConcourseSuite in the **Admin** module. The main functions of this module are:

- Create roles, which define fine-grained access to every utility in the system
- Define users and grant permissions
- Modify system parameters
- Create folders to extend the capabilities of the database without programming
- Configure the modules of ConcourseSuite
- Manage portal roles and grant access
- Examine system usage statistics, including the number of logins, information transferred, faxes sent, and used disk space





## Overview of the Home Module

This chapter helps you understand the features of the **Home** module of ConcourseSuite. The features of this module enable you to store and view basic information about your business, contacts, and employees. This module also summarizes all of the actionable information present in ConcourseSuite.

This chapter consists of the following sections:

- ❑ [Section 2.1, “How Does This Module Help You?”](#)
- ❑ [Section 2.2, “Understanding the Dashboards Page”](#)
- ❑ [Section 2.3, “Understanding the Welcome Page”](#)
- ❑ [Section 2.4, “Understanding the Calendar”](#)
- ❑ [Section 2.5, “Viewing the Mailbox”](#)
- ❑ [Section 2.6, “Managing Tasks”](#)
- ❑ [Section 2.7, “Building Action Lists”](#)
- ❑ [Section 2.8, “Assigning Action Plans”](#)
- ❑ [Section 2.9, “Managing Re-Assignments”](#)

### 2.1 How Does This Module Help You?

You can use this module to implement and organize the following tasks:

- Access your e-mails
- View your calendar, meetings, activities, tickets, and pending tasks
- Search for data
- Reassign tasks, opportunities, and activities to various persons in your hierarchy

### 2.2 Understanding the Dashboards Page

The **Dashboards** page is the default page in the **My Home Page** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 2.3 Understanding the Welcome Page

Click the **Welcome** link on the menu bar. The displayed page consists of a calendar and scheduled actions, as shown in [Figure 2.1](#).

The screenshot shows a web interface titled "Home" with a sub-header "Scheduled Actions for Kadam, Asha". On the left is a calendar for December 2007. The calendar shows dates from 1st to 31st. The 19th is highlighted in yellow, and the 20th has a blue icon with the number 1. The 24th has a blue icon with the number 1, and the 25th has a yellow star icon. The 31st has a yellow star icon. Below the calendar is a link "Subscribe to web calendar". On the right is a sidebar with a "Pending Items" dropdown menu. The menu is open, showing options: Pending Items, Tasks, Activities, Projects, Accounts, Opportunities, Tickets, and Project Tickets. Below the menu is a "Next 7 Days View" section for December 19, 2007 (Today), which says "Currently no items pending for you." Below that is a section for December 20, 2007, titled "Completed Activities (1)". It has a table with columns "Time", "Lead/Contact", and "Subject". The table contains one row: "4:00 PM", "C: Doe, John", and "Meeting With Client". Below that is a section for Monday, December 24, 2007, titled "Incomplete Tasks (1)". It has a table with columns "Description", "Priority", and "Age". The table contains one row: "Call Carter to set up meeting", "1", and "0". Below that is a section for Tuesday, December 25, 2007, which says "Holiday: Christmas Day".

Figure 2.1 The Welcome Page

The scheduled actions displayed on the right side of the calendar are:

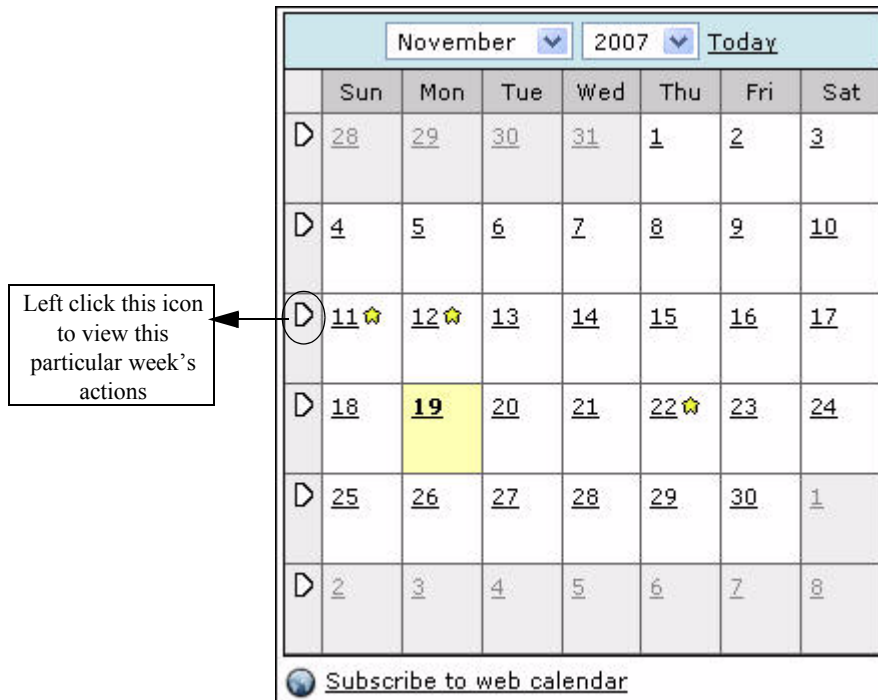
- Pending Items
- Tasks
- Activities
- Projects
- Accounts
- Opportunities
- Tickets
- Project Tickets

## 2.4 Understanding the Calendar

A calendar displayed on the left-hand side, by default, enables you to view a quick summary of the scheduled tasks for the selected month, as shown in [Figure 2.2](#).

You can view the scheduled actions for each day represented as icons in the

calendar. For more details, refer to [Section 2.4.2, “Viewing Scheduled Actions in the Calendar”](#).



**Figure 2.2 My Home Page Calendar**

You can view the calendar offline using the following procedure:

- Clicking the **Subscribe to Web Calendar** link below the calendar.
- Connecting to the internet and refreshing your calendar to download your latest home page calendar items.

---

**Note:** Ensure you have a desktop calendar application that supports the vCalendar protocol. Two well-known calendar applications are Mozilla Sunbird and Apple iCal.

---

## 2.4.1 Viewing the Calendar

You can choose a weekly or a daily view of the calendar. You can view the current date by selecting **Today** at the top of the calendar, as shown in [Figure 2.2](#). Selecting **Today** displays all scheduled activities pertaining to the current date. You can view the scheduled actions of a particular week by clicking the icon on the left side of the corresponding week, as shown in [Figure 2.2](#). Clicking **Back to Next 7 Days View** displays the current week.

Use the drop-down lists at the top of the calendar to change the month and year. ConcourseSuite remembers your calendar view settings for the duration of your current login session. It reverts to the **Next 7 Days View** at the next login.

## 2.4.2 Viewing Scheduled Actions in the Calendar

The **Scheduled Actions** section is displayed to the right of the calendar, as shown in [Figure 2.3](#). Scheduled actions include the following information:

- **Pending Items** - represented as a yellow triangle
- **Completed Activities** - represented as a blue square with a cell phone in it
- **Opportunities** - represented as a dollar sign
- **Holidays** - represented as a yellow star
- **Accounts** - represented as a black folder
- **Assignments** - represented as a grey square

Clicking a date in the calendar displays the scheduled actions for that specific day.

The screenshot shows a web calendar interface. On the left is a calendar grid for December 2007. The date December 20, 2007, is highlighted in yellow and contains a blue square icon with a white cell phone and the number '1'. To the right of the calendar is a sidebar titled 'Scheduled Actions for Kadam, Asha'. It features a 'Pending Items' dropdown menu and a 'Next 7 Days View' section. Under 'Next 7 Days View', the current day is 'Thursday, December 20, 2007 (Today)'. Below this, there is a section for 'Completed Activities (1)' with a table listing one activity: '4:00 PM C: Doe, John Meeting With Client'. A context menu is open over this activity, listing options: 'View Details', 'Modify Activity', 'View Contact Details', 'View Contact History', and 'Go To Contact'. Below the activity list, there is a section for 'Tuesday, December 25, 2007' which includes a holiday entry: 'Holiday: Christmas Day'. At the bottom left of the calendar area, there is a 'Subscribe to web calendar' link.

Figure 2.3 Scheduled Tasks

The **Scheduled Actions** section lists the scheduled activities. The scheduled activities are organized based on the scheduled calendar date and the type of the activity, such as Incomplete Tasks, Completed Activities, and Holidays. Clicking enables you to manage actions. When you click , a context menu is displayed.

The following tasks are available on the context menu:

- View Details
- Modify Activity
- View Contact Details

- View Contact History
- Go to Contact

---

**Note:** To return to the calendar from another area, click the **Welcome** sub-tab.

---

## 2.5 Viewing the Mailbox

ConcourseSuite includes an internal messaging system that enables you to send messages to other users of the solution.

Click **Mailbox** on the menu bar to access the mailbox. The default folders available are:

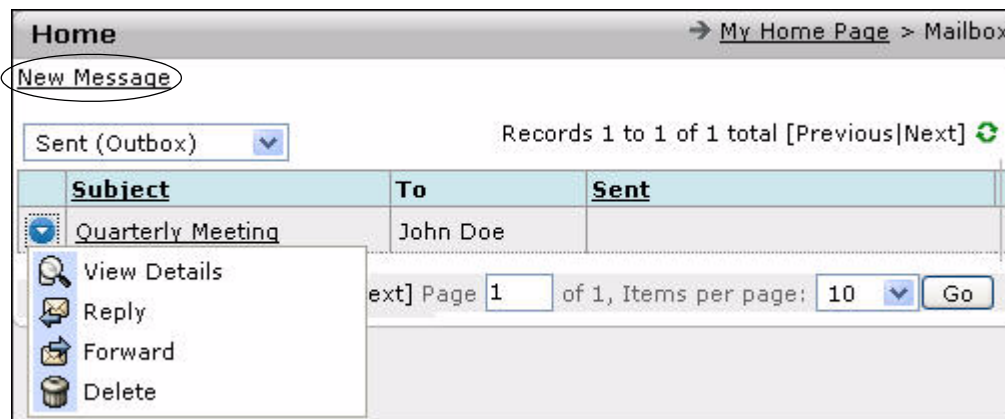
- Inbox
- Archived Messages
- Sent (Outbox)

You can perform the following tasks:

- Viewing details of a message
- Replying to a message
- Forwarding a message
- Deleting a message

### 2.5.1 Sending an Email

To compose a new message, click **New Message**. You can send an email to leads, contacts, employees, and so on.



**Figure 2.4 Accessing Mailbox**

The following steps enable you to send an email:

1. Click **New Message**.

The New Message page is displayed, as shown in [Figure 2.5](#).

My Home Page → My Home Page > Mailbox > New Message

Send Cancel

**New Message**

Recipient(s) None Selected [Add Recipients]\*

Subject \*

Options  Email copy to recipient(s)

Body \*

Send Cancel

**Figure 2.5 Creating a New Message**

2. To add a recipient, click **Add Recipients**.

A pop-up window is displayed, as shown in [Figure 2.6](#). By default, a list of contacts is displayed. You can also send messages to employees, account contacts, members of your projects, and leads by selecting an appropriate option from the drop-down menu, as shown in [Figure 2.6](#).

Search Last Name , First Name Search Clear

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

All Contacts -- None -- Records 1 to 10 of 22 total [Previous|Next]

	Title	Email	Contact Type	Site
hman	CRM Manager	sdhany@yahoo.com (Business)		None
		None		None

Done Cancel [Check All] [Clear All]

**Figure 2.6 Adding Recipients to the New Message**

3. Select the recipients to whom you want to send the message and click **Done**.

Search  ,

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

All Contacts  -- None --  Records 1 to 10 of 22 total [Previous|Next]

	Name	Title	Email	Contact Type	Site
<input type="checkbox"/>	Seif Eldin Abderahman	CRM Manager	sdhany@yahoo.com (Business)		-- None --
<input type="checkbox"/>	Jeremy Barsell		None		-- None --

[] []

Figure 2.7 Selecting the Recipients

4. Add the subject and body of the message.
5. Click **Send**.

The new message, you composed, is sent.

## 2.6 Managing Tasks

A personal task list is a set of tasks scheduled for the day or week. ConcourseSuite has a built in personal task list.

On clicking **Tasks**, the basic task listing screen is displayed, as shown in [Figure 2.8](#).

Home → [My Home Page](#) > Tasks

**Quickly Add a Task**

Description  \*  Personal

Add an Advanced Task

My Tasks  Incomplete Tasks  Records 1 to 2 of 2 total [Previous|Next]

	Priority	Task	Due Date	Age
<input type="button" value="v"/>	1	<input type="checkbox"/> Call Carter to set up meeting [ <a href="#">Contact</a> ]	12/17/2007 EST	0d
<input type="button" value="v"/>	1	<input type="checkbox"/> Call to set up a time [ <a href="#">Contact</a> ][ <a href="#">Ticket</a> ]	12/17/2007 EST	0d

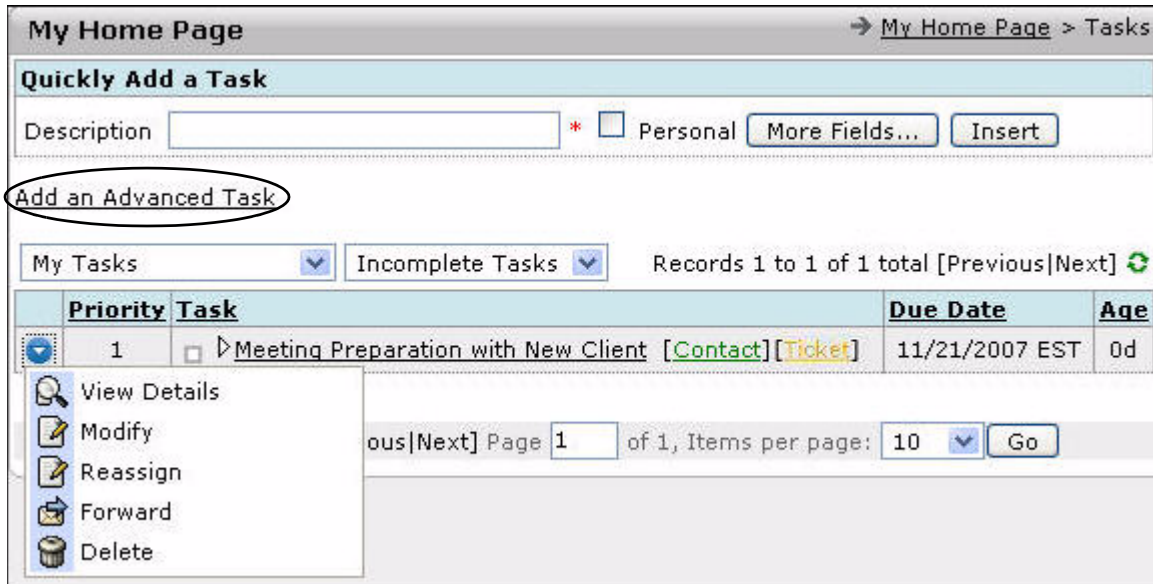
[Previous|Next] Page  of 1, Items per page:  10

Figure 2.8 Task List


The task listing contains the following items in each row:

- Priority of the task
- Description of the task
- Due date
- Age

To view details of the task, click . The **Contact** link (highlighted in green) to the right of the description, displays the **Contact Details** page.



**Figure 2.9 Task Actions**

The task list has a checkbox to the left of each task, where completed tasks are marked. When you click , a context menu is displayed. The following tasks are available on the context menu:

- View task details
- Modify a task
- Reassign a task to another employee, contact, contact account, projects, or leads
- Forward a task to another user
- Delete a task

Tasks related to a trouble ticket have a ticket link to the right of the description. To view the task details page, click the task description itself. The **Task Details** page is shown in [Figure 2.10](#).



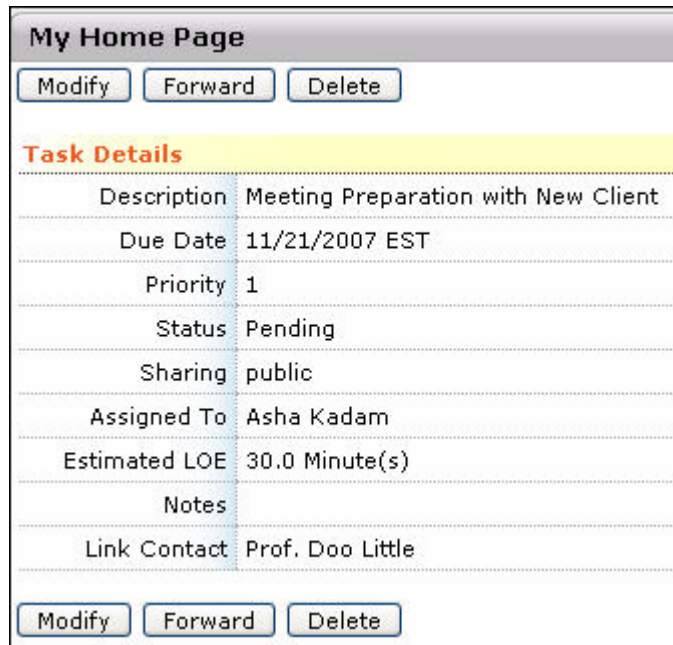


Figure 2.10 Task Details

The **Task Details** page contains the following information about the task:

- **Description** - refers to a short description of the task
- **Due Date** - refers to the expected date of completion of the task
- **Priority** - expresses the importance of the task
- **Status** - displays the status of the task, whether pending or complete
- **Sharing** - determines if the task is personal, which only you can see
- **Assigned To** - displays the name of the person in your hierarchy to whom the task is assigned
- **Estimated Level Of Effort (LOE)** - displays the estimated time for the task to be completed
- **Notes** - free form notes
- **Link Contact** - refers to a link to the related contact, if there is one

You can add a task using the following options on the **Task** page:

- [“Quickly Add a Task”](#)
- [“Add an Advanced Task”](#)

## 2.6.1 Quickly Add a Task

You can add a task by specifying only the description, as shown in [Figure 2.11](#).

Home → My Home Page > Tasks

**Quickly Add a Task**

Description  \*  Personal

[Add an Advanced Task](#)

My Tasks  Incomplete Tasks  Records 1 to 3 of 3 total [Previous|Next]

	Priority	Task	Due Date	Age
<input type="button" value="v"/>	1	<input type="checkbox"/> ▷ Call Carter to set up meeting [Contact]	12/17/2007 EST	7d
<input type="button" value="v"/>	1	<input type="checkbox"/> Call Carter to set up meeting	12/24/2007 EST	0d
<input type="button" value="v"/>	1	<input type="checkbox"/> ▷ Call to set up a time [Contact]	12/17/2007 EST	7d

[Previous|Next] Page  of 1, Items per page:

Figure 2.11 Adding a Task Using the Quickly Add a Task Option

## 2.6.2 Add an Advanced Task

A detailed task, specifying all the relevant details can be added in two ways, as listed below:

- Using the **Add an Advanced Task** option
- Using the **More Fields** button

Clicking the **More Fields** button, as shown in [Figure 2.12](#), displays the **Add a Task** form, which enables you to add a detailed task.

Home → My Home Page > Tasks

**Quickly Add a Task**

Description  \*  Personal

My Tasks  Incomplete Tasks  Records 1 to 3 of 3 total [Previous|Next]

	Priority	Task	Due Date	Age
<input type="button" value="v"/>	1	<input type="checkbox"/> ▷ Call Carter to set up meeting [Contact]	12/17/2007 EST	7d
<input type="button" value="v"/>	1	<input type="checkbox"/> Call Carter to set up meeting	12/24/2007 EST	0d
<input type="button" value="v"/>	1	<input type="checkbox"/> ▷ Call to set up a time [Contact]	12/17/2007 EST	7d

[Previous|Next] Page  of 1, Items per page:

Figure 2.12 Adding a Task Using the Add an Advanced Task Option

Selecting **Add an Advanced Task**, as shown in [Figure 2.12](#), also displays the **Add a Task** form, as shown in [Figure 2.13](#).

The screenshot shows a web form titled "My Home Page" with a "Task" section. The form contains the following fields and controls:

- Description:** A text input field with a red asterisk indicating it is required.
- Due Date:** A date picker and a dropdown menu set to "GMT-5 Eastern US".
- Priority:** A dropdown menu set to "1".
- Status:** A checkbox labeled "Complete".
- Sharing:** A checkbox labeled "personal".
- Assign To:** A text field containing "Asha Kadam" and a "[Change Owner]" link.
- Estimated LOE:** A text input field and a dropdown menu set to "Minute(s)".
- Notes:** A large text area for additional information.
- Link Contact:** A text field containing "None" and links for "[Change Contact]" and "[Clear Contact]".

Buttons for "Save", "Save & New", and "Cancel" are located at the top and bottom of the form.

Figure 2.13 The Add a Task Form

## 2.7 Building Action Lists

The **Action Lists** sub-tab enables you to interactively build a list of contacts on which you want to perform actions. This module is very useful in a sales or business development environment as it enables you to perform the following tasks:

- Add activities, opportunities, tickets, and tasks to any contact on the list
- View the contact record
- Send a multimedia message to the contact

### 2.7.1 Viewing, Creating, and Deleting Action Lists

To view or create action lists, click the **Action Lists** sub-tab on **My Home Page**. The action lists page is displayed, as shown in [Figure 2.14](#).

Home		→ My Home Page > Action Lists		
Add an Action List				
All In Progress Lists ▼		Records 1 to 2 of 2 total [Previous Next] ↻		
	Name	Progress		Last Updated ▲
		Complete	Total	
▼	<a href="#">Weekly call list for early in week</a>	0	10	12/20/2007 1:03 AM EST
▼	<a href="#">Call Clients to Wish Christmas</a>	0	10	12/19/2007 11:56 PM EST

[Previous|Next] Page 1 of 1, Items per page: 10 ▼ Go

Figure 2.14 The Action Lists Page

The page you are viewing may already have action lists, depending on how you have used ConcourseSuite until now, as shown in [Figure 2.15](#). You can perform the following tasks:

- View the details
- Modify the details
- Add contacts to action list
- Delete an action list

My Home Page		→ My		
Add an Action List				
All In Progress Lists ▼		Records 1 to 2 of		
	Name	Progress		
		Complete	Total	
▼	<a href="#">Weekly call list for early in week</a>	0	1	
<ul style="list-style-type: none"> <li>View Details</li> <li>Modify</li> <li>Add Contacts</li> <li>Delete</li> </ul>		0	1	

ous|Next] Page 1 of 1, Items per page: 10 ▼ Go

Figure 2.15 Action List Options

## 2.7.2 Working with Action Lists

You can filter the action lists you see in the list. The following lists are present in the drop-down list:

- **All in Progress Lists** - lists all the action lists which are in progress
- **All Complete Lists** - lists the completed action lists
- **All Lists** - lists all the action lists that are presently in the system

**All in Progress Lists** is the default option, as shown in [Figure 2.16](#).

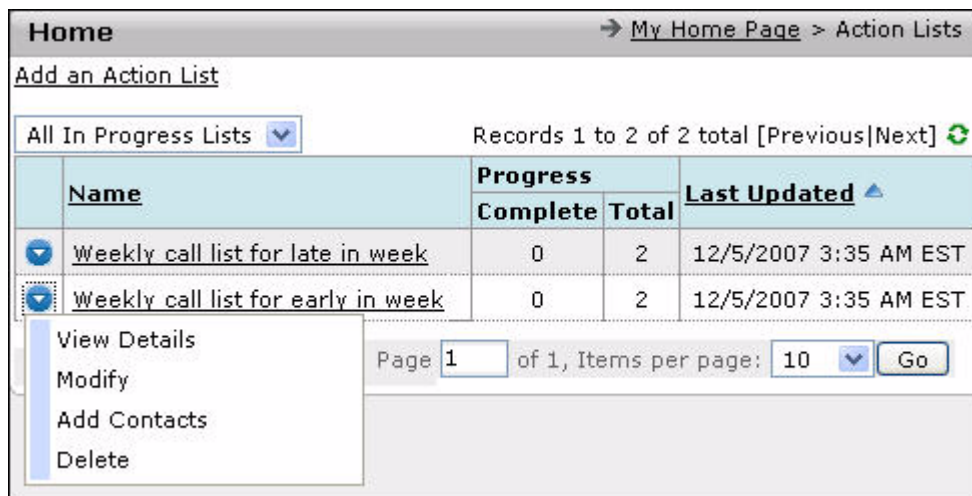


Figure 2.16 The Action Lists Page

The action list can be accessed by clicking **View Details** or by clicking the action list's name, which displays a page as shown in [Figure 2.17](#).

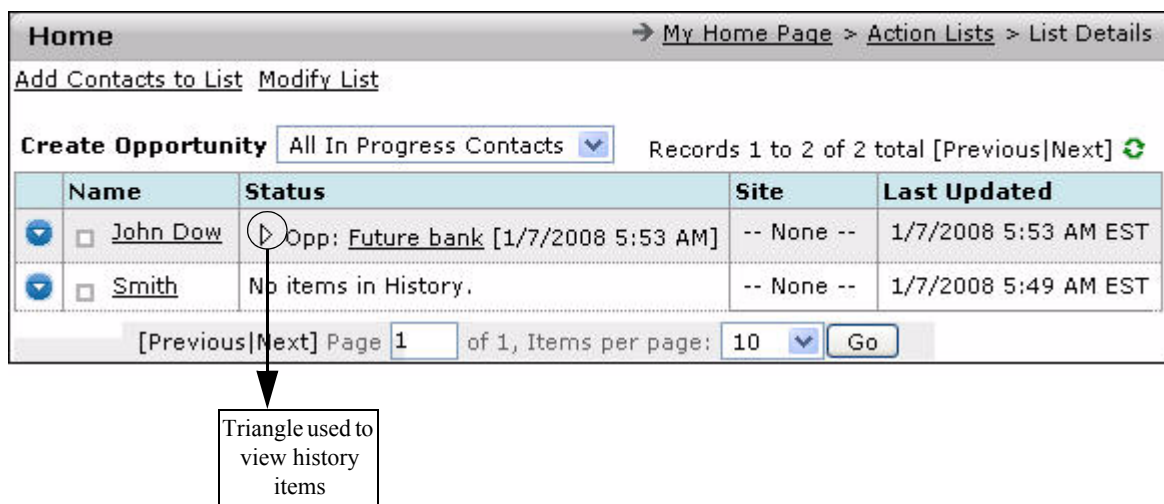


Figure 2.17 The Action List Details Page

The action **List Details** page contains the following information in each row:

- An action icon
- The name of the contact
- The status of actions for each contact
- The site of the contact
- The date and time of the last update for each contact


The **Action List** keeps a detailed chronological history of all actions for each contact in a compact format. The **Status** column displays the latest action, but you can view the entire history by clicking the little triangle, as shown in [Figure 2.16](#). The triangle is not displayed when there are no items in the history. A contact

without a triangle implies no history attached to the contact, as shown in [Figure 2.17](#).

The screenshot shows a web application interface with a table of contacts. The table has columns for Name, Status, Site, and Last Updated. A context menu is open over the first contact, 'Seif Eldin Abderahman', showing options like 'Show Contact Record', 'Log Activity', 'Add Opportunity', 'Add Ticket', 'Add Task', and 'Send Message'. The table also shows other contacts like 'John Dane', 'John Doe', and 'Leonard Ellis, Jr.' with their respective status and last updated dates.

Name	Status	Site	Last Updated
<input type="checkbox"/> <a href="#">Seif Eldin Abderahman</a>	▷ Task: <a href="#">Call to set up a time</a> [12/20/2007 1:06 AM]	None	12/20/2007 1:06 AM EST
<input type="checkbox"/> <a href="#">John Dane</a>	No items in History.	None	12/20/2007 1:03 AM EST
<input type="checkbox"/> <a href="#">John Doe</a>	No items in History.	None	12/20/2007 1:03 AM EST
<input type="checkbox"/> <a href="#">John Doe</a>	No items in History.	None	12/20/2007 1:03 AM EST
<input type="checkbox"/> <a href="#">Leonard Ellis, Jr.</a>	No items in History.	None	12/20/2007 1:03 AM EST

Figure 2.18 Viewing the Options in the Context Menu

When you click , a context menu is displayed. The following options are available on the context menu:

- Show Contact Record
- Log Activity
- Add Opportunity
- Add Ticket
- Add Task
- Send Message

### 2.7.2.1 Viewing the Contact Record

Clicking this option displays a contact record pop-up window enabling you to perform the following tasks:

- Modify a contact
- Move a contact
- Download the contact's vCard
- Delete a contact

You can view details, such as email address, phone number, mailing address, and other related information, as shown in [Figure 2.19](#).

For more details, refer to [Section 5.3.2, "Viewing Contacts"](#).

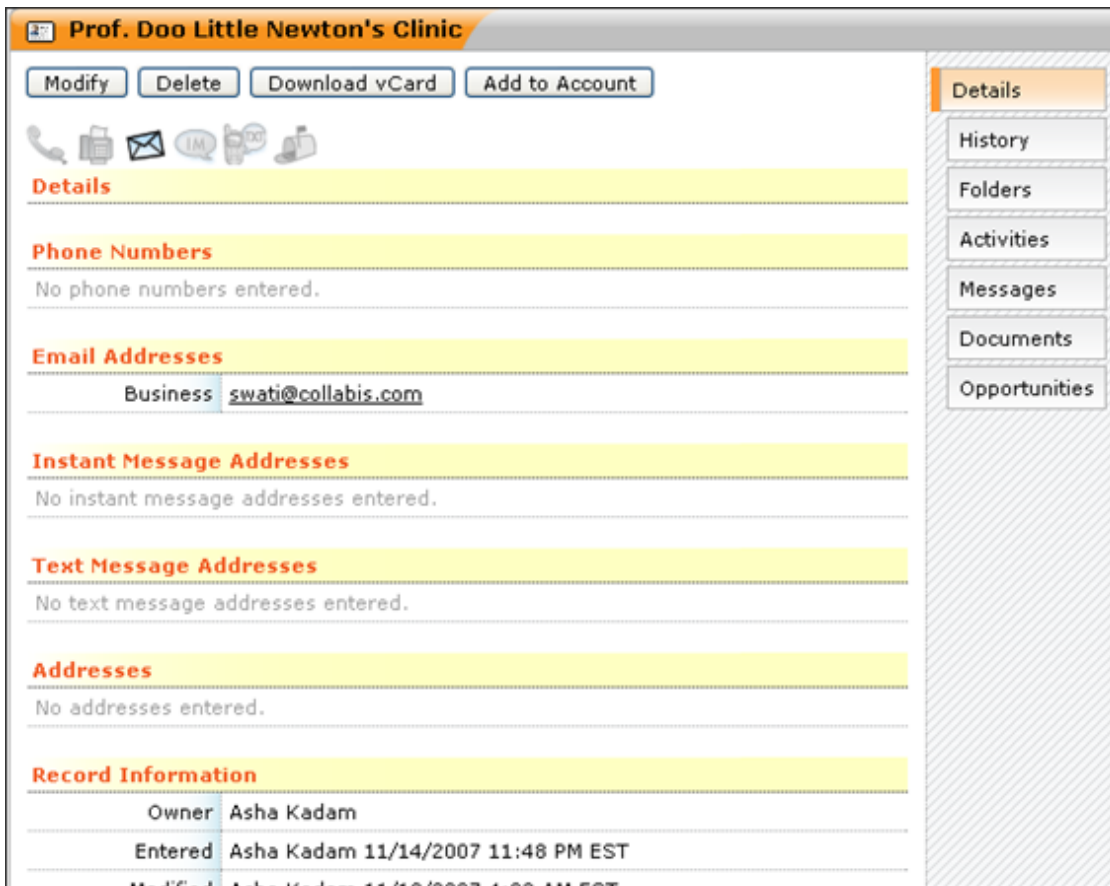


Figure 2.19 Pop-Up Contact Record

### 2.7.3 Adding an Action List

To add a new action list, select **Add an Action List** located at the top, as shown in [Figure 2.20](#).

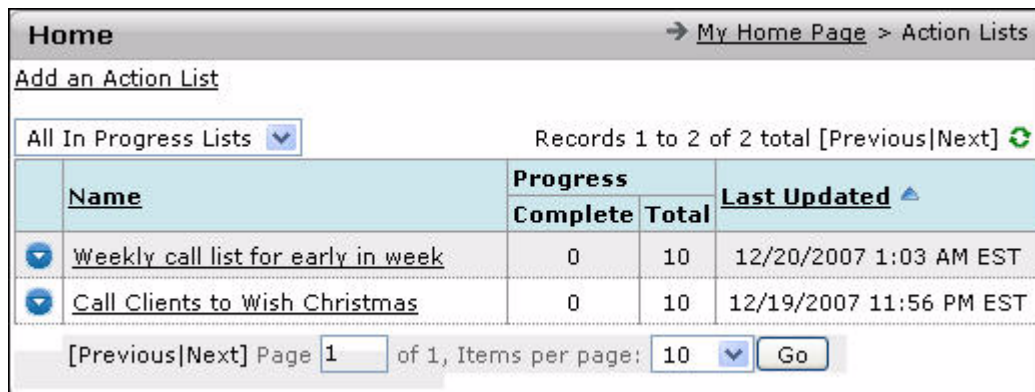


Figure 2.20 Adding an Action List

The **New Action List** page is displayed. Enter a description, and then add contacts, either manually with the **Add/Remove Contacts** link or by defining criteria, as shown in [Figure 2.21](#).

**My Home Page** → My Home Page > Action Lists > New Action List

Save Cancel

**Action List**

Description  \*

Assign To Asha Kadam \* [Change Owner]

Status  Complete

**Select criteria for this group \***

Contacts  Leads  Employees

Choose specific contacts: Selected criteria and contacts:

[Add/Remove Contacts]

Define criteria to generate a list:

Field Company Name

Operator is

Search Text

From My General Contacts

Add > Remove

Save Cancel

Figure 2.21 Add New Action List

You can define a criteria to select a list of contacts, leads, or employees. For example, you can select all the contacts with company name "Federal Bank". All the contacts matching the criteria are displayed in the list box on the right. Select the contacts you want to add in the action list and click **Add**.

You can also modify existing action lists using the **Modify List** link, as shown in [Figure 2.16](#).

## 2.8 Assigning Action Plans

Action plans consist of sequential tasks to be accomplished in order to carry out specific business activity, such as a product sale. The plan also explains in detail how to carry out each individual task. You can create action plans using **Action Plan Editor**. These action plans can be reused as templates. For more details, refer to [Section 16.7.3, "Using Action Plan Editor"](#).

You can add new action plans in the **Accounts** and **Help Desk** modules. For more details, refer to [Section 7.10.1, "Adding an Action Plan"](#).



Action plans, created in the **Accounts** and **Help Desk** modules, can be accessed from the **My Home Page** module. This module displays a dashboard that provides an overview of the assigned action plans for you, as shown in **Figure 2.22**. On selecting an action plan from the options, an overview of the plan is displayed in **My Dashboard** specifying the number of phases and plans in each phase, as shown in **Figure 2.22**. The page also contains all accounts and help desk related action plans assigned to the selected user. The page gives the following details of action plans:

- The action plan name
- Action required
- Person assigned
- The prospect name
- Weekly potential details
- The current phase
- The days in phase
- The days active
- Values from plan
- The date and time when the plan was last updated

The action plans requiring action are highlighted.

The screenshot shows a web interface for 'Action Plans'. At the top, there's a breadcrumb 'Home > My Home Page > Action Plans'. Below that is a 'My Dashboard' section with a table showing 'Name' (Asha Kadam) and 'Number of plans in each phase' (1). A dropdown menu shows 'Plan: 1. Launch New Product'. Below this is a filter 'Any Status Plans' and a pagination indicator 'Records 1 to 2 of 2 total [Previous|Next]'. The main table has columns: Name, Action Required, Assigned, Prospect Name, Weekly Potential, Current Phase, Days in Phase, Days Active, and Last Updated. Two rows are visible: 'Create Call List' (Action Required: No, Assigned: Asha Kadam, Prospect Name: Butts, Thomas, Weekly Potential: \$0.00, Current Phase: Action Plan, Days in Phase: 0, Days Active: 0, Last Updated: 12/20/2007 1:45 AM) and 'Launch New Product' (Action Required: No, Assigned: Sung Chung, Prospect Name: Alston Co., Weekly Potential: \$0.00, Current Phase: Attach an Opportunity, Days in Phase: 0, Days Active: 0, Last Updated: 12/20/2007 1:43 AM). At the bottom, there's a pagination control: '[Previous|Next] Page 1 of 1, Items per page: 10 [Go]'. The 'Launch New Product' row is highlighted in blue.

Figure 2.22 The Action Plan Dashboard Page

## 2.9 Managing Re-Assignments

In any company, employees come and go from time to time. A good CRM system ensures that none of the company's critical business intelligence is lost with a departing employee.

ConcourseSuite provides a very sophisticated and flexible re-assignment system that makes it simple to re-assign files and data from one employee to another in case one employee leaves, or another joins. The **Re-assignments** sub-tab, as shown in [Figure 2.23](#), enables you to re-assign the files and data to new employees without affecting the business flow.

For example, if a salesperson leaves your company after several years of employment, this person might have accumulated a large amount of business data including contact names and phone numbers, presentations, and quotations. All together, this data adds up to the total history of the salesperson's dealings with customers. The major issues at play are:

- If the data is stored only on the salesperson's laptop computer, the salesperson could walk out of your company with the data, then it may be lost permanently.
- If the data is in a CRM application, but cannot be re-assigned in bulk, then it may be lost in plain sight.
- If all the pertinent data is entered in to ConcourseSuite, then it will not be lost, and can be re-assigned to another employee.



Figure 2.23 Selecting the Re-Assignments Sub-Tab

## 2.9.1 Using Re-Assignments

As a user, you are allowed to freely re-assign your own data, or that of employees who report to you. Clicking the **Re-assignments** sub-tab, displays the **Re-assignments** page, as shown in [Figure 2.24](#).

**My Home Page** → [My Home Page](#) > Re-assignments

User to re-assign data from: None Selected ▼ \*

Re-assign	From User	To User
Accounts (0)	None Selected	<span>None Selected</span> ▼
All Contacts (0)	None Selected	<span>None Selected</span> ▼
General Contacts (Public) (0)	None Selected	<span>None Selected</span> ▼
General Contacts (Controlled Hierarchy) (0)	None Selected	<span>None Selected</span> ▼
Account Contacts (0)	None Selected	<span>None Selected</span> ▼
Leads (0)	None Selected	<span>None Selected</span> ▼
Opportunities being Managed (Open Only) (0)	None Selected	<span>None Selected</span> ▼
Opportunities (Open Only) (0)	None Selected	<span>None Selected</span> ▼
Opportunities (Open & Closed) (0)	None Selected	<span>None Selected</span> ▼
Project Activities (Incomplete) (0)	None Selected	<span>None Selected</span> ▼
Account Revenue (0)	None Selected	<span>None Selected</span> ▼
Tickets (Open) (0)	None Selected	<span>None Selected</span> ▼
Ticket Tasks (Incomplete) (0)	None Selected	<span>None Selected</span> ▼
Document Stores (0)	None Selected	<span>None Selected</span> ▼
Users Reporting-to (0)	None Selected	<span>None Selected</span> ▼
Pending Activities (0)	None Selected	<span>None Selected</span> ▼
Action Lists (In Progress) (0)	None Selected	<span>None Selected</span> ▼

**Figure 2.24 The Re-Assignments Page**

You must define from who you re-assign data and to whom you re-assign it. The options for re-assigning are given below:

- Re-assign all the data to one person or different categories to different people
- Re-assign only part of the data
- Re-assign responsibility for tickets to someone else and leave the rest as it is

To commit the re-assignment, click **Update** located at the bottom of the page. Click **Cancel** to abandon the changes.



## Creating a Website

This chapter provides information about the **Website (Beta)** module of ConcourseSuite. This module enables you to build a website and share selected ConcourseSuite data with public.

This chapter consists of the following sections:

- ❑ [Section 3.1, “How Does This Module Help You?”](#)
- ❑ [Section 3.2, “How to Access Website \(Beta\) Module”](#)
- ❑ [Section 3.3, “Understanding the Dashboard Page”](#)
- ❑ [Section 3.4, “Creating a Public Website”](#)
- ❑ [Section 3.5, “Organizing Your Previous Work Examples”](#)
- ❑ [Section 3.6, “Adding Products”](#)
- ❑ [Section 3.7, “Uploading Media Files”](#)

### 3.1 How Does This Module Help You?

ConcourseSuite enables you to create a website for your organization. You can showcase your products and make it available to the public. For example, you can add a product catalog in the **Products** module and make it available on the website. You can create multiple websites in this module by selecting from multiple available templates. Clicking the **Website (Beta)** link displays the **Dashboard** page with a set of links that enable you to create and configure your website.

### 3.2 How to Access Website (Beta) Module

You can gain access to the **Website (Beta)** module in the **Admin** module. To gain access to the **Website (Beta)** module, contact your Administrator.

The **Website (Beta)** link is displayed on the global link menu bar, as shown in [Figure 3.1](#).

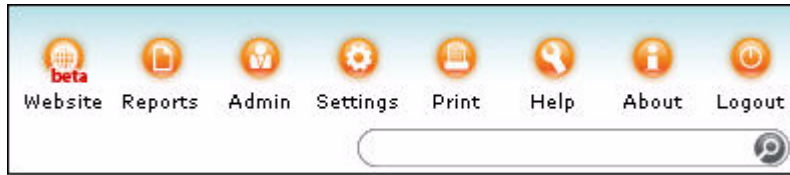


Figure 3.1 Website (Beta) Icon on the Global Menu Bar

### 3.3 Understanding the Dashboard Page

When you click the **Website (Beta)** link, the **Dashboard** page is displayed, as shown in [Figure 3.2](#).

The following links are displayed on the **Dashboard** page:

- **Setup Public Website** - enables you to create a framework of the website.
- **Setup Examples of Past Work** - enables you to create categories and items of your work experience to be displayed on the website.
- **Setup Products and Services** - enables you to add products and services that your company offers.
- **Setup Media** - enables you to add media files to the website. Media files consist of image, audio, and video files.



Figure 3.2 The Website Dashboard Page

### 3.4 Creating a Public Website

You can create multiple websites using the **Website** module. At a given time, only one website can be made active.

Creating a public website involves creating a framework for the website and adding web pages and tabs to the website. Tabs group web pages of similar information under one head. You can create a website by:

- ["Creating a Framework of the Website"](#)
- ["Adding Tabs"](#)
- ["Adding Web Pages"](#)
- ["Adding Data in Rows"](#)

- “Adding Data in Columns”
- “Adding Media Files”
- “Adding a Document”

### 3.4.1 Creating a Framework of the Website

Creating a framework for the website involves:

- **Selecting a template** - select a template for the website that presents your data on the website in a way you want.
- **Specifying details** - enter details, such as name, description, keywords for page hits, and so on for the website.
- **Selecting Logo** - display your company logo on the website.
- **Selecting Look and Feel** - select a layout of the website.
- **Selecting Style** - select a style suitable style sheet for the website. A stylesheet describes styles of elements on the website.

To create a website:

1. Click **Setup Public Website**.

The **Sites** page is displayed, as shown in [Figure 3.3](#).

Add Site				
				Records 1 to 10 of 20 total [Previous Next] ↻
	Name	Description	Hit Count	Enabled
▼	<a href="#">WILL</a>		0	No
▼	<a href="#">Test</a>		0	No
▼	<a href="#">SDFSDFSDFS</a>		0	No
▼	<a href="#">SFSDFSDFS</a>		0	No
▼	<a href="#">SFSDFSFSd</a>		0	No
▼	<a href="#">SDFSDFSDFS</a>		0	No
▼	<a href="#">Tick561Test</a>		0	No
▼	<a href="#">Tick561Test2</a>		0	No
▼	<a href="#">Tick562Test</a>		0	No
▼	<a href="#">Ticket499</a>		0	No

[Previous|Next] Page  of 2, Items per page:

Figure 3.3 The Site Page

2. Click **Add Site**.

The **Add Website** page is displayed, as shown in [Figure 3.4](#).

★ The following details determine how this website works and will also help you refer

### Add Website

Name	Dummy *
Enabled	<input checked="" type="checkbox"/> (indicates if the website can be publicly accessed at this time)
Meta Description	CRM, Customer Relationship Management, Publishing Tools, Web Tools
Notes	Product1, Product2, Product3
Scripts	

Save Cancel

**Figure 3.4 Specifying Website Details**

The following fields are displayed on the **Add Website** page:

- **Name** - enter the name of the website.
- **Enabled** - select to indicate that the website is made active and available to public.
- **Meta Description** - enter keywords related to the information being displayed on the website.  
The values entered in the **Meta Description** field are saved as meta-tags that enable indexing of pages by search engines.
- **Notes** - enter notes for the website.
- **Scripts** - enter scripts that enables you to specify Javascript that will apply to all the pages in the website.

For example, this field can be used to accommodate scripts for Google Analytics. When you want the website to be analyzed by Google (for page hits), it prompts you to enter the website URL, and based on this provides you a script. You must copy that script in the **Script** field. This prepares all the web pages for Google Analytics.

3. Enter website details and click **Save**.

The website is displayed in accordance with the selected template, as shown in [Figure 3.5](#).





Figure 3.5 The New Website Page

4. Click **Choose Site Logo** to select your company logo that you want to be displayed on the website.

The **Top Folder** page is displayed. This page displays all the files that can be selected, as shown in [Figure 3.6](#). To select the logo file from the **Top Folder** page, it should be available on the page. To upload a file on the **Top Folder** page, refer to [Section 3.7, “Uploading Media Files”](#). You can add a file (only .png, .jpg, and .gif files are acceptable) from the local hard disk to the **Top Folder** page.

5. Locate the logo file on the **Top Folder** page.



Figure 3.6 Specifying Company Logo in the Website

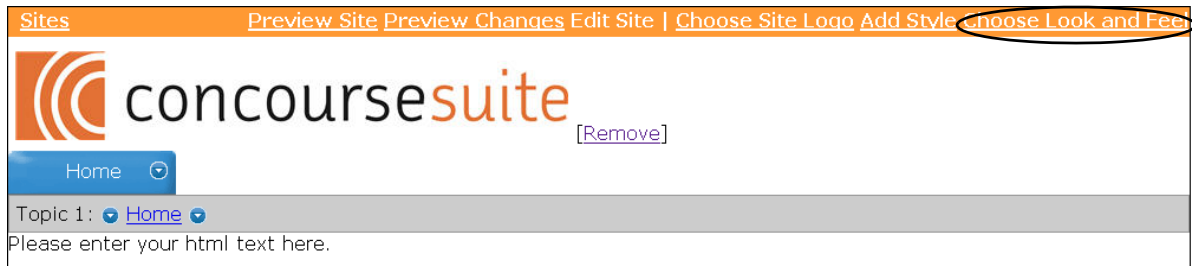
6. To display the logo file on the website, click the logo file link.  
The logo is displayed on the website, as shown in [Figure 3.7](#).



Figure 3.7 Company Logo Displayed on the Website

You can click **Remove** to remove the logo from the website.

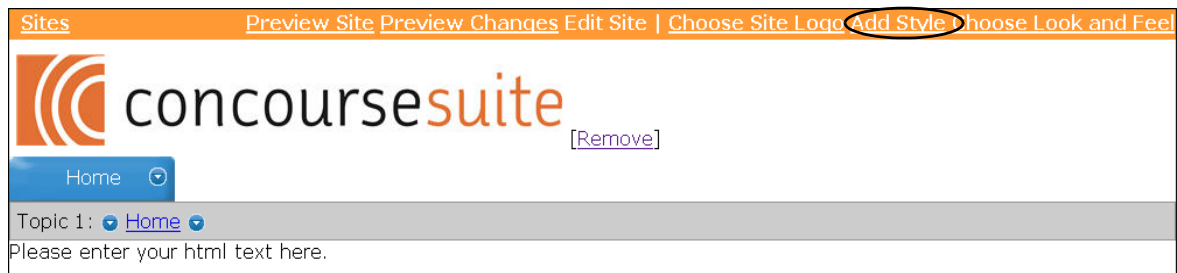
7. Click **Choose Look and Feel**, as shown in [Figure 3.8](#).



**Figure 3.8 Selecting Look and Feel for the Website**

The **Styles** page is displayed. Select a layout for the website.

8. Click **Add Style**, as shown in [Figure 3.9](#).



**Figure 3.9 Selecting Style for the Website**

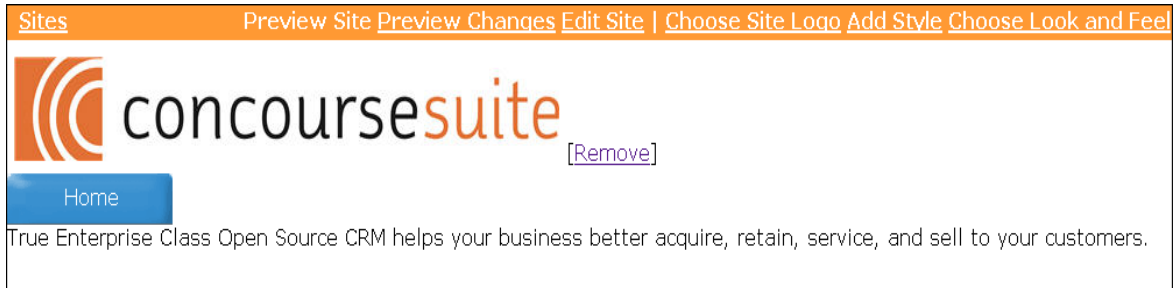
The **Upload Stylesheet** page is displayed, as shown in [Figure 3.10](#).

Upload StyleSheet	
Name	<input type="text" value="Concourse Suite"/> *
File	<input type="text" value="C:\Documents and Settings\Swati\Desktop\stylesheet"/> <input type="button" value="Browse..."/> *
	* File should be in CSS format. Large files may take a while to upload.
Image	<input type="text"/> <input type="button" value="Browse..."/>
	* The Image file being uploaded should be in one of the following formats. *.gif *.jpg *.png
Images	<input type="text"/> <input type="button" value="Browse..."/>
	* Images should be in ZIP format. Large files may take a while to upload.
<input type="button" value="Upload"/> <input type="button" value="Cancel"/>	

**Figure 3.10 Uploading Stylesheet for the Website**

9. Specify the stylesheet for the website.  
The basic framework of the website is ready.

Click **Preview Site** to preview the website without displaying the changes made to the website. If you edit the website, you can click **Preview Changes** to view the changes. A sample website is shown in **Figure 3.11**.



**Figure 3.11 A Sample Website Created in ConcourseSuite**

A list of websites created is displayed on the **Sites** page, as shown in **Figure 3.12**.

Add Site Records 1 to 21 of 21 total [Previous|Next]

Name	Description	Hit Count	Enabled
<input type="radio"/> <u>WILL</u>		0	No
<input type="radio"/> <u>Test</u>		0	No
<input checked="" type="radio"/> <u>SDFSDFSDFS</u>		0	No
<input type="radio"/> <u>SFSDFSDFS</u>		0	No
<input type="radio"/> <u>SFSDFSFSd</u>		0	No
<input type="radio"/> <u>SDFSDFSDFS</u>		0	No
<input type="radio"/> <u>Tick561Test</u>		0	No
<input type="radio"/> <u>Tick561Test2</u>		0	No
<input type="radio"/> <u>Tick562Test</u>		0	No
<input type="radio"/> <u>Ticket499</u>		0	No
<input type="radio"/> <u>TOM WILL</u>		0	No
<input type="radio"/> <u>SDFSDFSDF</u>		0	No
<input type="radio"/> <u>SDFSDFSDFSDF</u>		0	No
<input type="radio"/> <u>SDFSDFSDFSDFSDF</u>		0	No
<input type="radio"/> <u>sdfsdfsdfs</u>		0	No
<input type="radio"/> <u>Dummy</u>	CRM, Customer Relationship Management, Publishing Tools, Web Tools	0	Yes

[Previous|Next] Page  of 1, Items per page:

**Figure 3.12 The Website Added in the Site Page**

The following options are available on the **Sites** page for a particular website, as shown in **Figure 3.13**:

Add Site				
Records 1 to 21 of 21 total [Previous Next]				
	Name	Description	Hit Count	Enabled
	WILL		0	No
	Test		0	No
	SDFSDFSDFS		0	No
	Tick562Test		0	No

	Edit Details		0	No
	Preview		0	No
	Modify		0	No
	Enable		0	No
	Copy		0	No
	Delete		0	No

Figure 3.13 Options Available on the Site Page

- **Edit Details** - enables you to edit the website.
- **Preview** - enables you to preview the website.
- **Modify** - enables you to modify the name and description of the website. When you click **Modify**, the **Modify Website** page is displayed, as shown in [Figure 3.14](#).

The following details determine how this website works and will also help you refer

**Modify Website**

Name  \*

Enabled  (indicates if the website can be publicly accessed at this time)

Meta Description

Notes

Scripts

Figure 3.14 The Modify Website Page

- **Enable** - enables you to activate the website and make it available for public viewing.


---

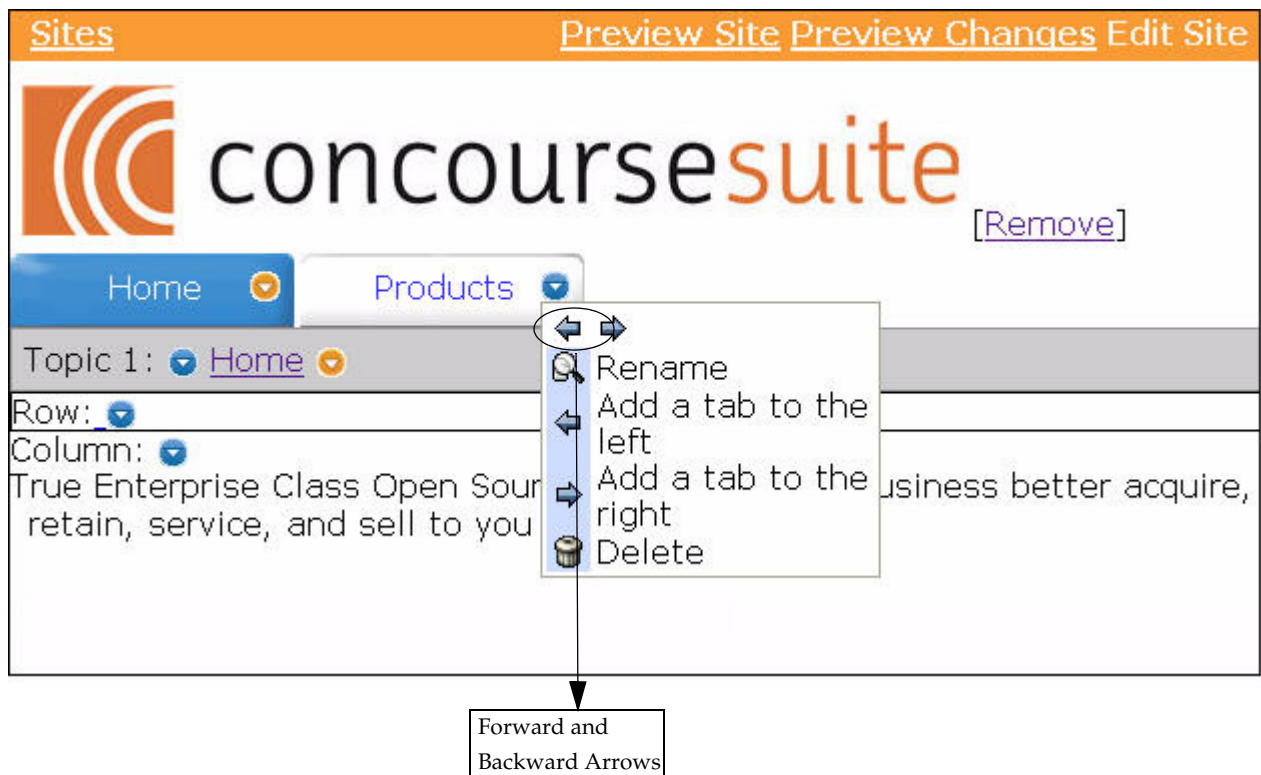
**Note:** When you enable the website, the **Sitemap** link is displayed on the top right corner of the website. The **Sitemap** displays the number of times the website is viewed.

---

- **Copy** - enables you to create a copy of an existing website.
- **Delete** - enables you to delete the website.

### 3.4.2 Adding Tabs

A tab groups related information under one head on the same web page. You can add or remove tabs by clicking  beside the tab name, as shown in [Figure 3.15](#).



**Figure 3.15 Adding or Removing Tabs**

You can click the forward and backward arrows (as shown in [Figure 3.15](#)) to change the location of the selected tab. You can also delete the selected tab.

When you click **Rename**, the **Modify Tab** page is displayed, as shown in [Figure 3.16](#). Click **Update**.

Modify Tab	
Title	<input type="text" value="Products"/> * (This will become the tab's Meta-Title)
Enabled	<input checked="" type="checkbox"/>
Internal Description	<input type="text" value="To display the products of the company."/> (This will become the tab's Meta-Description)
Keywords	<input type="text" value="Product1, Product2, Product3"/> (This will become the tab's Meta-Keywords)
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Figure 3.16 Renaming a Tab

### 3.4.3 Adding Web Pages

In ConcourseSuite, you can add web pages under a tab. The default page created under a tab is **Topic 1**. This behaves as sub-level grouping of information under a tab. The set of options available for **Topic 1** are:

- **Upward and Downward Arrows** - to move the selected topic up or down one level.
- **Modify** - to change the name and internal description of the topic, as shown in [Figure 3.17](#).

Modify Topic	
Name	<input type="text" value="Company Profile"/>
Internal Description	<input type="text" value="Product list"/> <input type="text" value="Company profile"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Figure 3.17 Modifying Topic

- **Add a Topic Below or Above the Topic** - to add another topic below or above the selected topic.

To add a web page under a topic, click  beside the tab name under the topic name, as shown in [Figure 3.18](#).



Figure 3.18 Adding Web Page in a Website

The following options are available for a web page:

- **Upward and Downward Arrows** - to move the selected web page up or down one level.
- **Enter Construction Mode** - to be able to modify information on a web page, you must select **Enter Construction Mode**.
- **Modify Page Attributes** - to change the properties (for example, internal description) of the web page. When you click **Modify Page Attributes**, **Modify Page** is displayed, as shown in [Figure 3.19](#)

Modify Page	
Name	Home * (This will become the page's Meta-Title)
Enabled	<input checked="" type="checkbox"/>
Internal Description	<input type="text"/> (This will become the page's Meta-Description)
Page Alias	Reference the content from page: <input type="text"/> [select]
Page Priority	medium ▼
Change Frequency	weekly ▼
Keywords	<input type="text"/> (This will become the page's Meta-Keywords)
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Figure 3.19 The Modify Page

- **Commit Changes** - to make the changes made to the web page effective.
- **Cancel Changes** - to cancel the changes made to the web page.
- **Add a Page Above or Below the Page** - to add a web page above or below the selected page.

You can add a page above or below the current page. When you select **Add a Page Above This Page** or **Add a Page Below This Page**, **Add Page** is displayed, as shown in [Figure 3.20](#).



Add Page	
Name	Products* (This will become the page's Meta-Title)
Enabled	<input type="checkbox"/>
Internal Description	Products1, Product2, (This will become the page's Meta-Description)
Page Alias	Reference the content from page: <input type="text"/> [select]
Page Priority	medium ▼
Change Frequency	weekly ▼
Keywords	<input type="text"/> (This will become the page's Meta-Keywords)
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 3.20 The Add Page

Specify values in the following fields:

- **Name** - enter a name for the page.
- **Enabled** - select to indicate that the web page is made active and available to the public.
- **Internal Description** - enter keywords related to the information being displayed on the web page.  
The values in the **Internal Description** field are saved as meta tags that enable indexing of pages by search engines.
- **Page Alias** - click **Select** to select an already created page. The current page derives the user interface of the selected page.
- **Page Priority** - select the priority of the web page.
- **Change Frequency** - select the frequency of changing the web page.
- **Keywords** - enter keywords related to the information displayed on the web page.  
The values in the **Keywords** field are saved as meta tags that enable indexing of pages by search engines.

### 3.4.4 Adding Data in Rows

ConcourseSuite creates a website in a table format. You can add information in rows and columns. The options available to add information in a row are shown in [Figure 3.21](#).

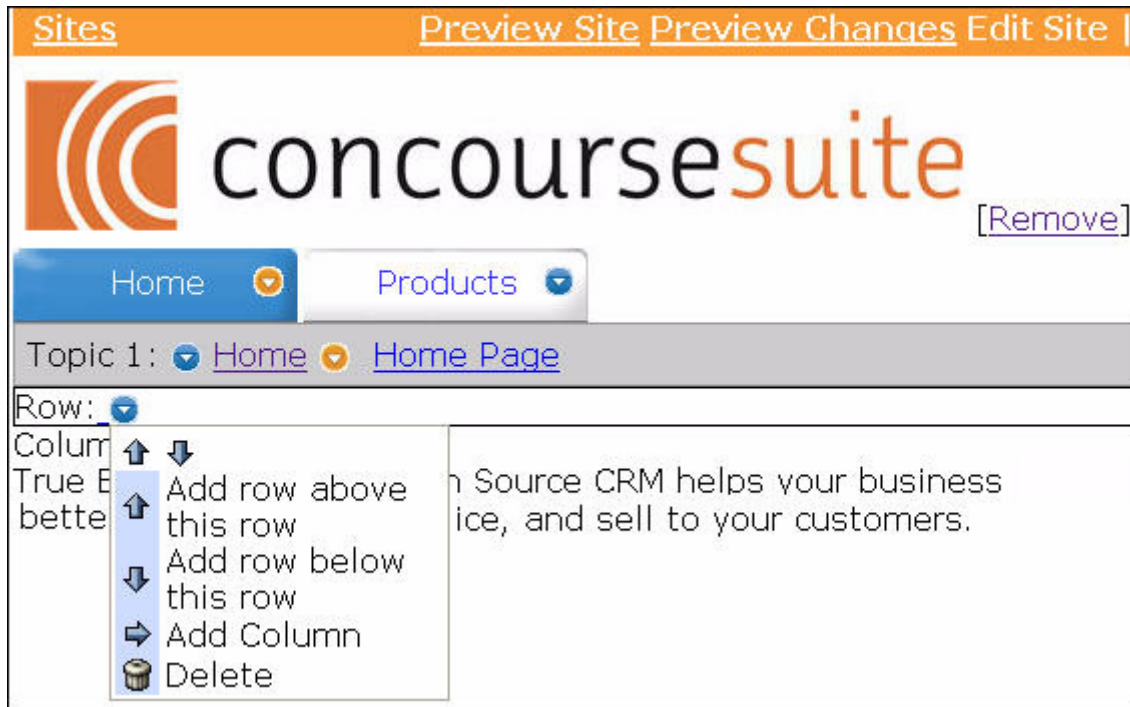


Figure 3.21 Row Options

You can add a row above or below the current row. You can also add a column in the row. When you click **Add Column**, a page to set column properties is displayed, as shown in Figure 3.22.

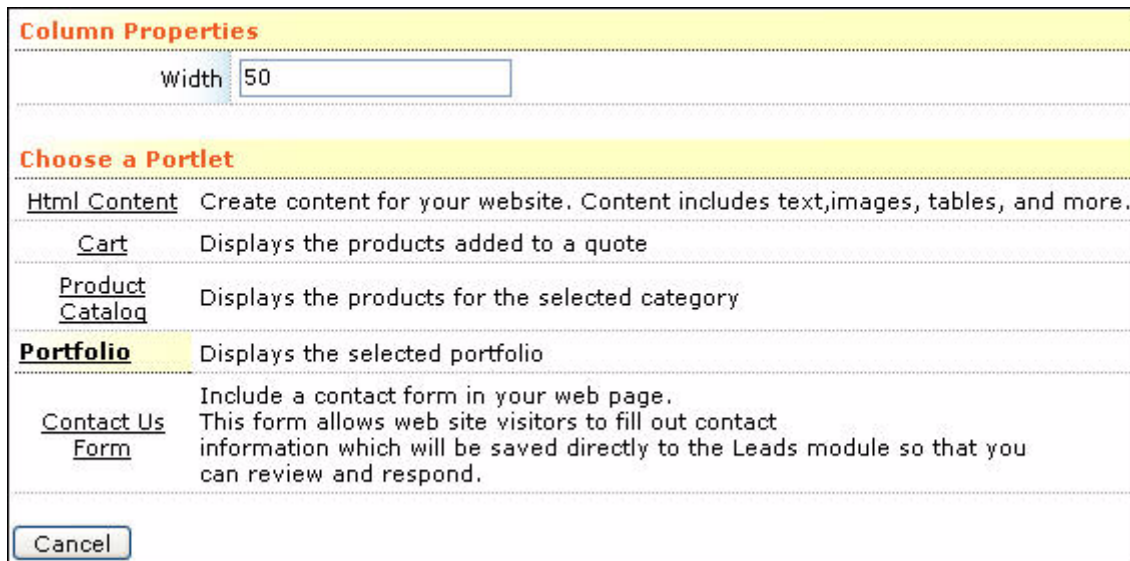


Figure 3.22 Setting Column Properties

Portlets are in-built mini applications that you can use in your web pages based on your requirement. For example, to add contact information, select **Contact Us Form**. If you want a blank column to be able to enter text of your choice, select **HTML Content**.

The portlets available in ConcourseSuite are:

- [“Configuring the HTML Content Portlet”](#)
- [“Configuring the Cart Portlet”](#)
- [“Configuring the Product Catalog Portlet”](#)
- [“Configuring the Portfolio Portlet”](#)
- [“Configuring the Contact Us Portlet”](#)

### 3.4.4.1 Configuring the HTML Content Portlet

The **HTML Content** portlet enables you to display the content in a way that suits your requirements. When you select **HTML Content**, the **Configure the Portlet Properties for HTML Content** is displayed, as shown in [Figure 3.23](#).

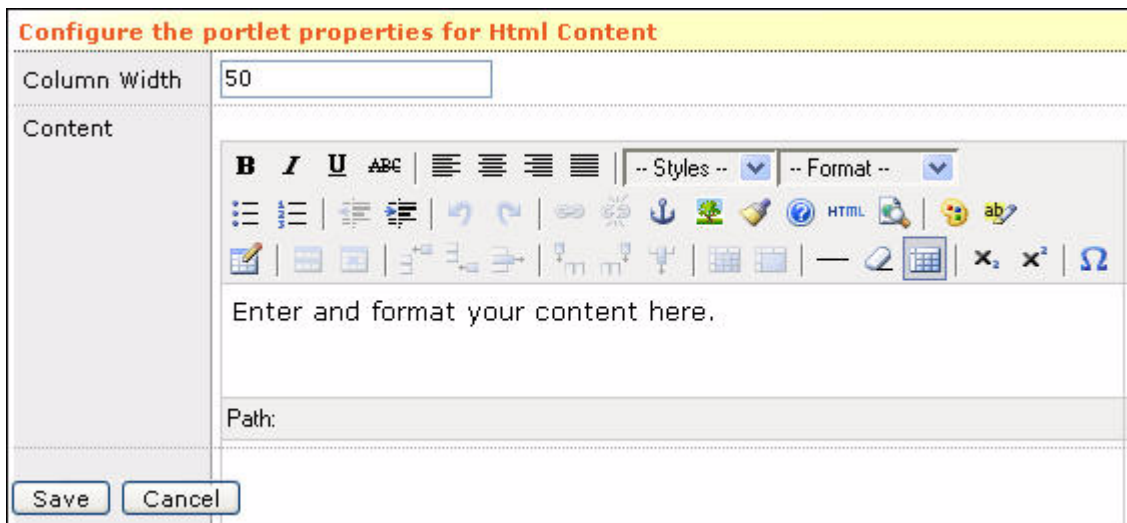


Figure 3.23 Configure the Portlet Properties for Contact Us Form

On this page, a text area with formatting options is provided. In this text area, you can also add an image and link a document. For details on adding an image and providing a link to a document, refer to [Section 3.4.6, “Adding Media Files”](#) and [Section 3.4.7, “Adding a Document”](#).

### 3.4.4.2 Configuring the Cart Portlet

The **Cart** portlet enables you to display the products added to a quote. When you select **Cart**, the **Configure the Portlet Properties for Cart** page is displayed, as shown in [Figure 3.24](#).

Configure the portlet properties for Cart	
Column Width	<input type="text" value="50"/>
Email To	<input type="text"/>
Email subject	<input type="text"/>
Quote sent message	<input type="text" value="Your quote h"/>
Cart empty message	<input type="text" value="Your cart is e"/>
Email message to the quote reviewer	<div> <p>Email message to the quote reviewer</p> <p><b>B</b> <i>I</i> <u>U</u> ABC                </p> <p><code>#{quoteRequester.name}</code> has requested a quote for the follows.</p> <p>Path:</p> </div>
Email message to the quote requester	<div> <p>Email message to the quote requester</p> <p><b>B</b> <i>I</i> <u>U</u> ABC                </p> <p>You have requested a quote for the items listed below. Your quote has been sent to <code>#{quoteReviewer.email}</code>. Your request will be reviewed, and you will receive an email soon.</p> <p>Path:</p> </div>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 3.24 Configure the Portlet Properties for Cart

The default value of **Column Width** is 50. You can change it according to your requirement.

Enter the recipient and subject of the mail in the **Email To** and **Email Subject** fields, respectively. Enter the body of the mail to be sent to the reviewer and requester of the quote.

When you click **Save**, the cart is displayed on the website.

### 3.4.4.3 Configuring the Product Catalog Portlet

When you select **Product Catalog**, the **Configure the Portlet Properties for Product Catalog** page is displayed, as shown in [Figure 3.25](#).

Configure the portlet properties for Product Catalog	
Column Width	<input type="text" value="50"/>
Category	Select the category to display in your portal None Selected <a href="#">[ Select ]</a> <a href="#">[ Clear ]</a>
Product	<input checked="" type="checkbox"/> Show product SKU
	<input type="text" value="Item #"/>
	<input checked="" type="checkbox"/> Show product price
	<input type="text"/>
	<input checked="" type="checkbox"/> Show price savings between MSRP and price
	<input type="text" value="Original Price"/>
	<input type="text" value="Instant Savir"/>
Search	<input type="checkbox"/> Display search link on details page
	<input type="checkbox"/> Default the page to a search form
Cart	<input type="checkbox"/> Allow products to be added to cart for quoting and follow-up
Added to quote message	<input type="text" value="This product"/>
Email	<input type="checkbox"/> Allow products to be emailed to a friend
Email body	<p>Product details message template</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>B</b> <i>I</i> <u>U</u> ABC   [List Icons]   -- Styles --   -- Format --</p> <p>[Rich Text Icons]</p> <p>Hello,</p> <p>`\${email.fromName}` wanted to share the following product with you:</p> <p>`\${product.name}`  `\${product.imageSource}`  `\${product.allowedInformation}`</p> <p>The following comments were made:  `\${email.comments}`</p> <p>You may view this product at our website by clicking <a href="#">here</a>.</p> <p>If this does not automatically open your browser and take you to ...</p> <p>Path:</p> </div>
Email	<input type="text" value="Forwarded fr"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 3.25 Configuring Properties for Product Catalog

Select the category of the products that you want to display on the website. All the products under the selected category will be included. Select the **Allow products to be emailed to a friend** option to send an email about the product to a friend. The email is drafted for you in **Email Body**. You can edit the email body.

Click **Save** to configure the portlet. The products in the selected category are displayed on the website, as shown in [Figure 3.26](#).

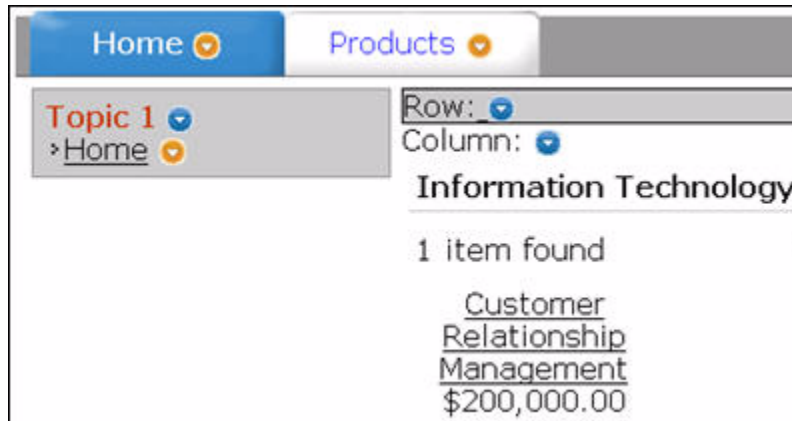


Figure 3.26 Product Catalog on the Website

#### 3.4.4.4 Configuring the Portfolio Portlet

The **Portfolio** portlet enables you to showcase your work experience to the public. When you click **Portfolio**, the **Configure the Portlet Properties for Portfolio** page is displayed, as shown in [Figure 3.27](#).

Configure the portlet properties for Portfolio	
Column Width	<input type="text" value="50"/>
Category	Select the category to display in your portal None Selected <input type="button" value="[_Select]"/> <input type="button" value="[_Clear]"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 3.27 Configure the Portlet Properties for Portfolio

Click **Select** to select the category of portfolio to be displayed on the website. A list of categories available is displayed. Select the category you want to display on the website and click **Save**.

For more details on adding a category or item in the **Portfolio** portlet, refer to [Section 3.5, "Organizing Your Previous Work Examples"](#).

#### 3.4.4.5 Configuring the Contact Us Portlet

When you select **Contact Us Form**, the **Configure the Portlet Properties for Contact Us Form** page is displayed, as shown in [Figure 3.28](#).

Configure the portlet properties for Contact Us Form	
Column Width	<input type="text" value="50"/>
Introduction message	<div style="border: 1px solid gray; padding: 5px;">           A brief message which explains that providing contact information can help the user:            Please enter your name and contact information. This will help us to serve you better.         </div> <div style="float: right; font-size: small;">This introduction will appear at the top of the form.</div>
Thank you message	<div style="border: 1px solid gray; padding: 5px;">           Thank the user for providing you with their contact information:            Thank you for contact us. We will review your message and respond accordingly.         </div> <div style="float: right; font-size: small;">This message will appear after the contact form is submitted by the user.</div>
Source	<div style="border: 1px solid gray; padding: 5px;"> <input type="text" value="-- None --"/> <ul style="list-style-type: none"> <li>-- None --</li> <li>Advertisement</li> <li>Employee Referral</li> <li>External Referral</li> <li>Partner</li> <li>Public Relations</li> <li>Trade Show</li> <li>Web</li> <li>Word of Mouth</li> <li>Other</li> </ul> </div>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 3.28 Configuring Portlet Properties for Contact Us Form**

Enter values in **Column Width**, **Introduction Message**, **Thank You Message**, and **Source** and click **Save**.

A contact form with **First Name**, **Last Name**, **Email Address**, **Organization Name**, **Questions/Comments** fields is displayed, as shown in [Figure 3.29](#).

You can send us your feedback at:

**Contact Form**

First Name

Last Name

Email Address  \*

Organization Name

Questions/Comments

**Figure 3.29 Contact Form on the Website**

## 3.4.5 Adding Data in Columns

The options provided to add information in a column are shown in [Figure 3.30](#).

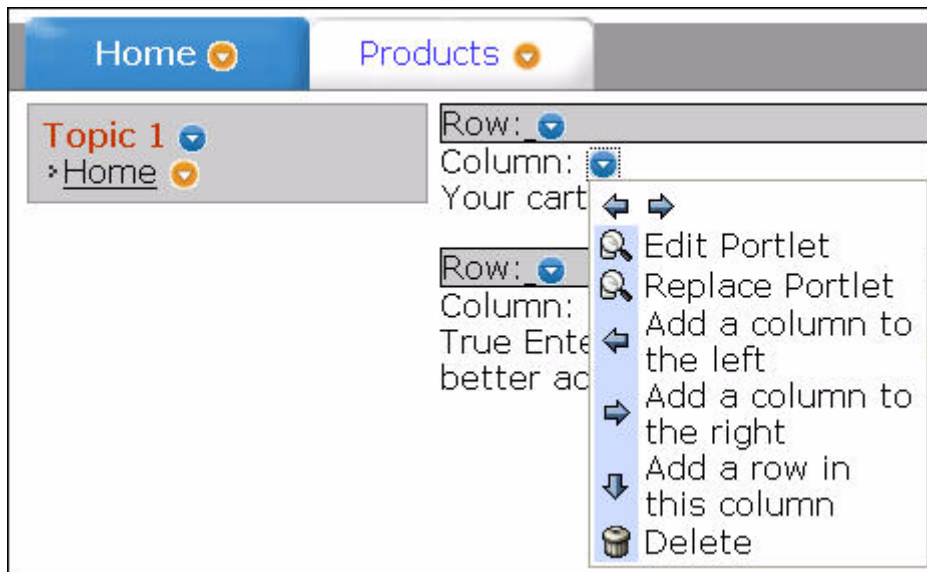


Figure 3.30 The Column Options


You can perform the following actions on a column:

- **Forward and Backward Arrows** - to move the location of the current column forward or backward.
- **Edit Portlet** - to edit the information displayed in the column. When you click **Edit Portlet**, the **Configure the Portlet Properties** page is displayed. Specify the values and click **Save**.
- **Replace Portlet** - to change the portlet and then edit the information to be displayed in the column. For more details, refer to [Section 3.4.4, "Adding Data in Rows"](#).
- **Add a Column to the Left or Right** - to add or delete a column to the left or right of the column.
- **Add a Row** - to add a row to the column.
- **Delete** - to delete the column.

## 3.4.6 Adding Media Files

Media files consist of image, audio, or video files. You can add media files to the website to make it more effective. To add a media file in a column, you must select the **HTML Content** portlet for the column.

Only those files, which are available on the **Top Folder** page, can be added. For more details, refer to [Section 3.7, "Uploading Media Files"](#).

On the **Configure the Portlet Properties for HTML Content** page, click , as shown in [Figure 3.31](#).



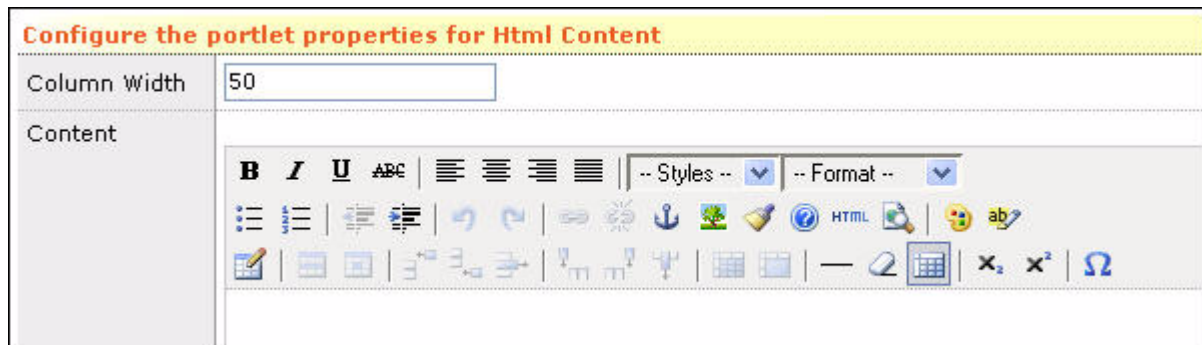


Figure 3.31 Uploading Image in the Website

The **Insert/Edit Image** window is displayed, as shown in [Figure 3.32](#).

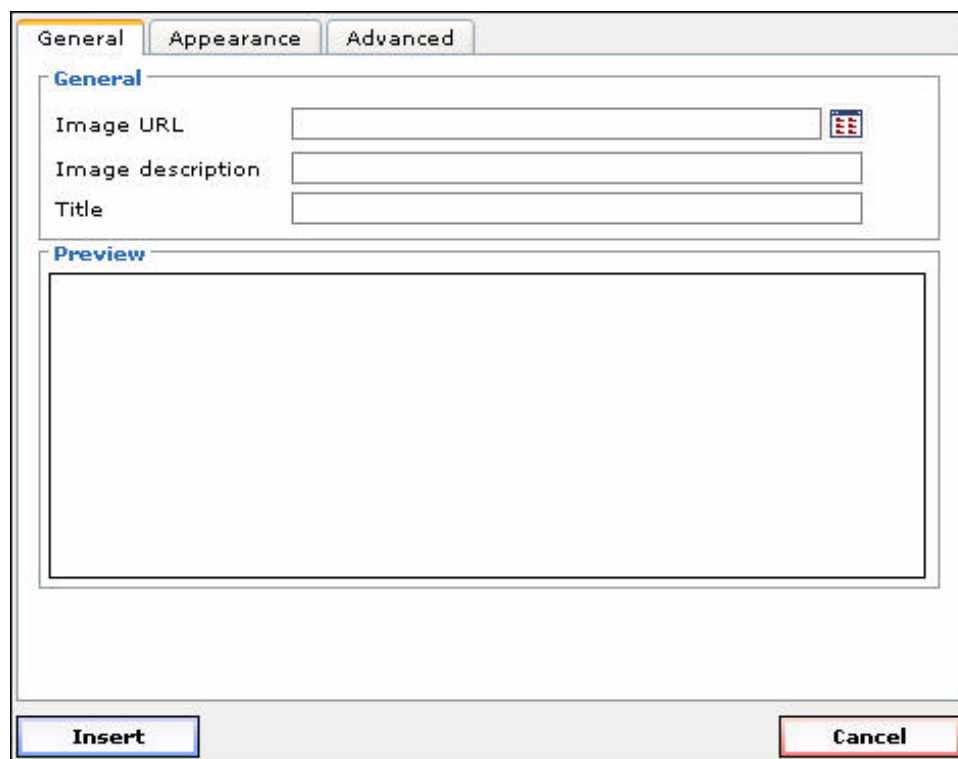


Figure 3.32 Inserting Media File in a Website

Specify the location of the file in the **Image URL** field or click , as shown in [Figure 3.32](#), to display the **Top Folder** page, as shown in [Figure 3.33](#).



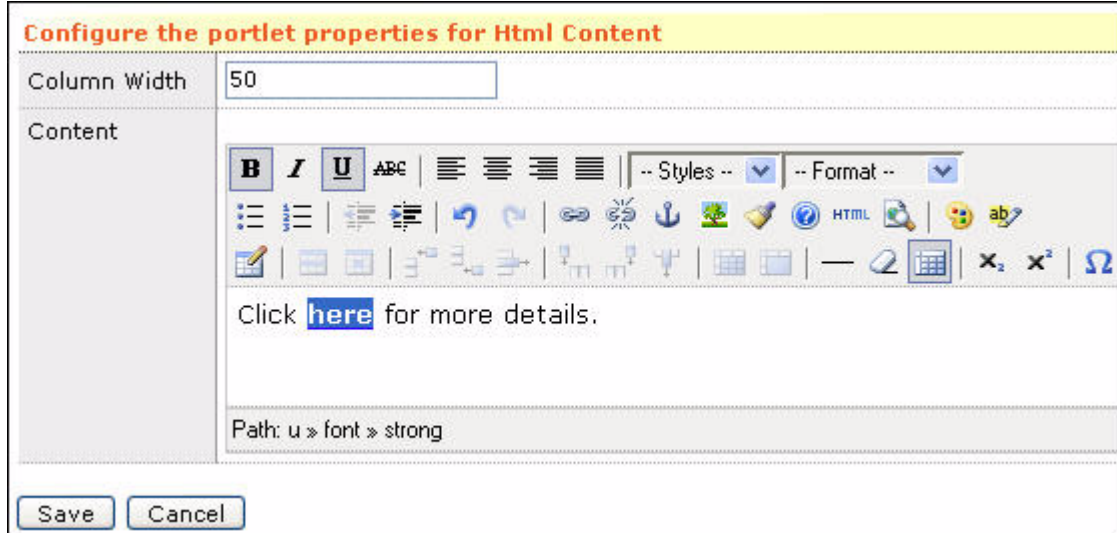


Figure 3.35 The Linking Icon

The **Insert/Edit Link** window is displayed, as shown in [Figure 3.36](#).

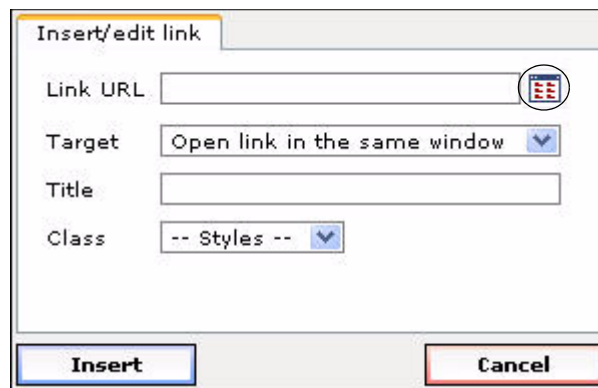


Figure 3.36 The Insert/Edit Link Window

Click the **Link URL** icon. The **Top Folder** page is displayed. Select the required document. For more details on uploading a document on the **Top Folder** page, refer to [Section 3.7, “Uploading Media Files”](#).

On the **Insert/Edit Link** window, you can specify the option to open the target document in the same or new window in the **Target** field and click **Insert**. The **Configure the Portlet Properties for HTML Content** page is displayed. Click **Save**.

The link is added to the website, as shown in [Figure 3.37](#).

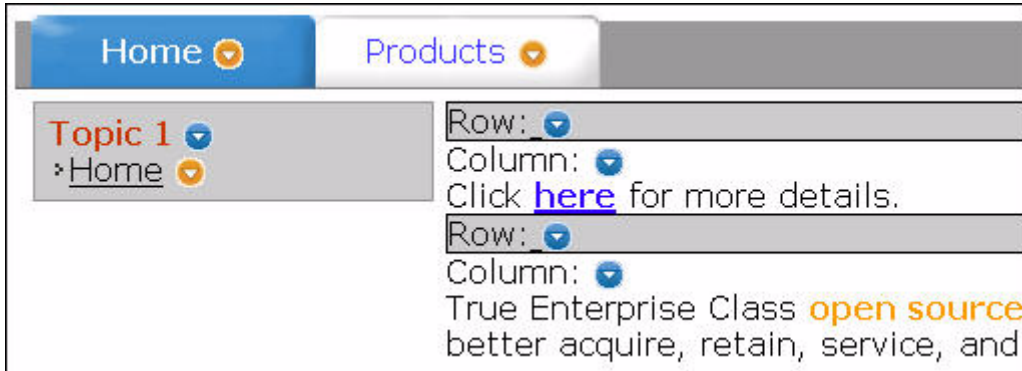


Figure 3.37 Document Link on Website

### 3.5 Organizing Your Previous Work Examples

The previous work examples enable you to showcase your organization's experience. You can add categories and items on the **Setup Examples of Past Work** page. Items can be created under categories or independently.

To add categories and items:

1. Click **Setup Examples of Past Work**.

The **Setup Examples of Past Work** page is displayed, as shown in [Figure 3.38](#).

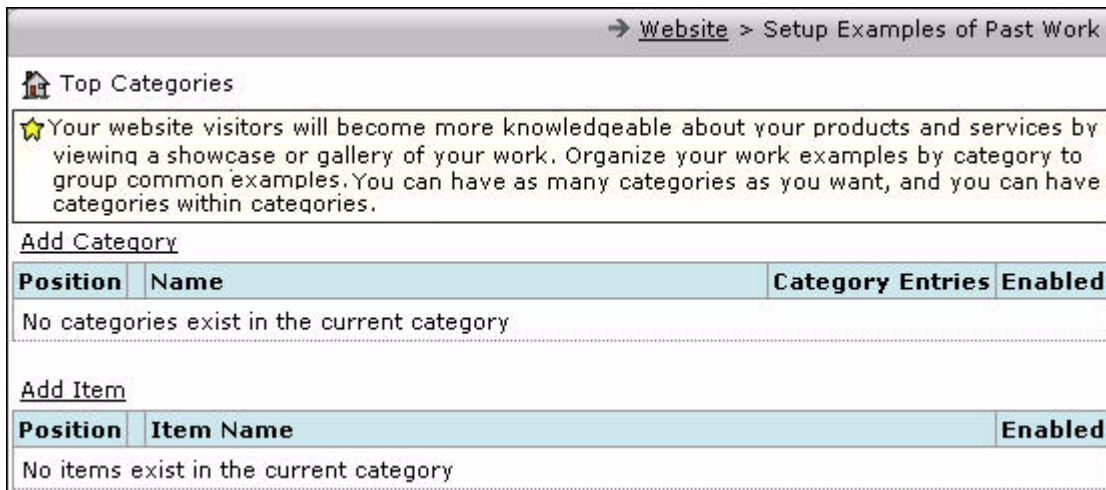


Figure 3.38 Adding Category and Item

2. Click **Add Category**.

The **Add Category** page is displayed.

3. Enter a name and a description of the category, as shown in [Figure 3.39](#).

Website (Beta) → Website > Category Details > Add Item

Top Categories > Software Applications > Item

### Add Item

Name	<input type="text"/> *
Description	<input type="text"/>
Approved	<input checked="" type="checkbox"/>
Caption	<input type="text"/>
File	<input type="text"/> <input type="button" value="Browse..."/>

\* Large files may take awhile to upload.  
Wait for file completion message when upload is complete.

Figure 3.39 Adding Details of the Category

The **Approved** option enables the category to be displayed in the category list.

4. Click **Save**.

The category is added.

5. To add an item in the category, click **Add Item**, as shown in [Figure 3.40](#).

**Website (Beta)**

[Home](#) [Top Categories](#) > Software Applications

**Category Details**

Name	Software Applications
Description	The application programs developed so far by the organization.
Enabled	Yes

[Add Category](#)

Position	Name
No categories exist in the current category	

[Add Item](#)

Position	Item Name
No items exist in the current category	

Figure 3.40 Adding Item in a Category

The Add Item page is displayed, as shown in Figure 3.41.

**Website (Beta)** → [Website](#) > [Category Details](#) > Add Item

[Home](#) [Top Categories](#) > [Software Applications](#) > Item

**Add Item**

Name	<input type="text" value="Concourse Suite"/> *
Description	<input type="text" value="This is a complete customer relationship management application"/>
Approved	<input checked="" type="checkbox"/>
Caption	<input type="text" value="White Paper"/>
File	<input type="text" value="C:\ConcourseSuite\WhitePaper.doc"/> <input type="button" value="Browse..."/>

\* Large files may take awhile to upload.  
Wait for file completion message when upload is complete.

Figure 3.41 Adding Item Details

6. Enter the name and description of the item.
7. You can also associate text or picture to the item. Select the appropriate file by clicking **Browse** and enter a caption to the file in the **Caption** field.
8. Click **Save**.

The **Item Details** page is displayed, as shown in [Figure 3.42](#).

**Website (Beta)**

[Top Categories](#) > [Software Applications](#) > Item

**Details**

Category	Software Applications
Name	Concourse Suite
Description	This is a complete customer relationship management application.

**Record Details**

Entered	Asha Kadam 11/19/2007 2:44 AM EST
Modified	Asha Kadam 11/19/2007 2:44 AM EST

**Figure 3.42 The Item Details Page**

You can add a new tab to the website and add this information on a new web page using the **Portfolio** portlet. For more details, refer to [Section 3.4.4.4, “Configuring the Portfolio Portlet”](#).

## 3.6 Adding Products

You can add products and services that your organization offers to the website. Click **Setup Products and Services**. The **Editor** page in the **Products** module is displayed, as shown in [Figure 3.43](#).

**Products** → [Products](#) > List of Products

[Top Categories](#)  
[New Category](#) | [New Product](#)

Records 1 to 2 of 2 total [Previous|Next]

Name	SKU	Price	Start Date	Expiration Date	Enabled
<a href="#">Product 1</a>					No
<a href="#">TeleSmart</a>	445	\$450,000.00	12/18/2007		Yes

[Previous|Next] Page  of 1, Items per page:

**Figure 3.43 The Product Editor Page**

On this page, you can add a category of products and new products. For more details, refer to [Section 8.4, “Adding a Category”](#) and [Section 8.5, “Adding a Product”](#), respectively.

## 3.7 Uploading Media Files

Media files include image, audio, and video files. You can add these media files to the website to make it more effective. You can upload media files using the **Setup Media** link. The **Media** page is displayed.

You can create a new folder by clicking **New Folder** and save files in that folder. Alternatively, you can add a media file by clicking **Submit File**, as shown in [Figure 3.44](#).

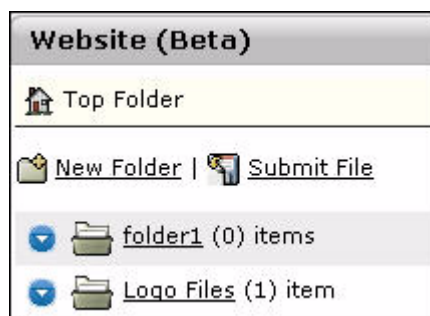


Figure 3.44 The Media Page

To add a new folder and save a media file in the folder:

1. Click **New Folder**.

The **New Folder** page is displayed, as shown in [Figure 3.45](#).

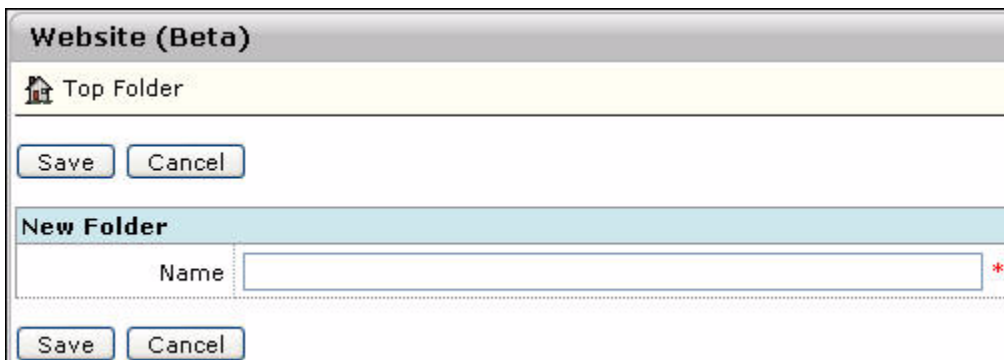
The screenshot shows a web interface titled "Website (Beta)". At the top, there is a "Top Folder" section with a home icon. Below this, there are two buttons: "Save" and "Cancel". Below the buttons, there is a section titled "New Folder". Under "New Folder", there is a label "Name" followed by a text input field. A red asterisk is visible to the right of the input field. Below the input field, there are two buttons: "Save" and "Cancel".

Figure 3.45 Adding a New Folder

2. Enter the name of the folder.
3. Click **Save**.

The folder is added, as shown in [Figure 3.46](#).



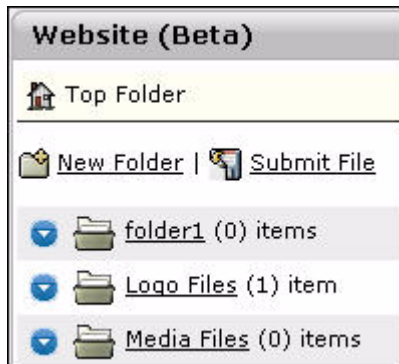


Figure 3.46 Viewing the Folder

4. To add a media file, click **Submit File**.

The **Upload Document** page is displayed, as shown in [Figure 3.47](#).

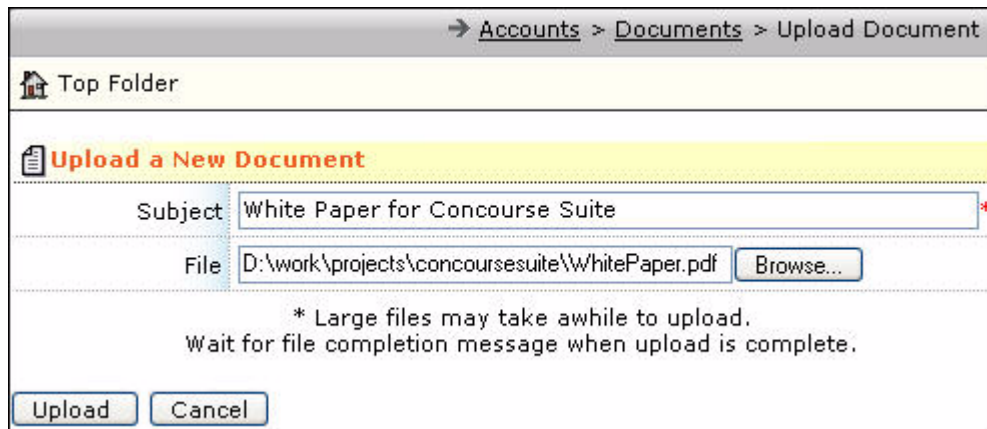


Figure 3.47 The Upload Document Page

5. Enter the caption of the file in **Subject**.
6. Click **Browse** to add a file.
7. Click **Upload**.

The media file is added. You can **Download**, **Rename**, or **Delete** this file, as shown in [Figure 3.48](#).

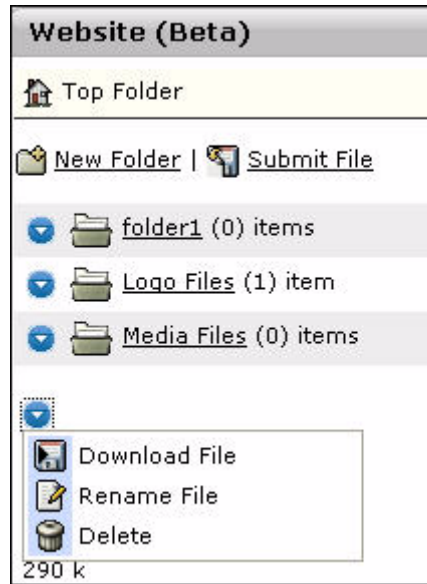


Figure 3.48 Media File Options

You can use these files while creating the website. For more details, refer to [Section 3.4.6, "Adding Media Files"](#).

## Managing Leads

This chapter provides information on the **Leads** module of ConcourseSuite. This module helps you work with prospective customers of your company and to monitor the efficiency of your business processes.

This chapter consists of the following sections:

- ❑ [Section 4.1, “How Does This Module Help You?”](#)
- ❑ [Section 4.2, “Understanding the Leads Dashboards”](#)
- ❑ [Section 4.3, “Understanding the Leads Overview”](#)
- ❑ [Section 4.4, “Searching for a Lead”](#)
- ❑ [Section 4.5, “Adding a Lead”](#)
- ❑ [Section 4.6, “Adding a vCard”](#)
- ❑ [Section 4.7, “Importing Leads”](#)
- ❑ [Section 4.8, “Exporting Leads”](#)

### 4.1 How Does This Module Help You?

Prospects are individuals who may have expressed interest in doing business with you or who you think might be future customers. To work with prospects effectively, you need to have up-to-date information about the prospects and their business. Using the **Leads** module, you can record all relevant details of your prospective customers. Authorized employees can view useful information including the efficiency statistics that help them in converting prospects into actual customers.

The **Leads** module provides the necessary tools to manage lead information right across the pre-sales process, from the acquisition of a prospective client, to conversion of the prospect into a customer. The **Import** feature is a tool that enables you to bulk-import leads, thus saving time and effort.

Clicking the **Leads** tab displays the **Leads** menu bar, which enables you to navigate through the **Leads** module, as shown in [Figure 4.1](#).



Figure 4.1 Accessing the Leads Module

## 4.2 Understanding the Leads Dashboards

The **Dashboards** page is the default page in the **Leads** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 4.3 Understanding the Leads Overview

The **Dashboard** page has a dashboard area on the left, and a listing of leads on the right.

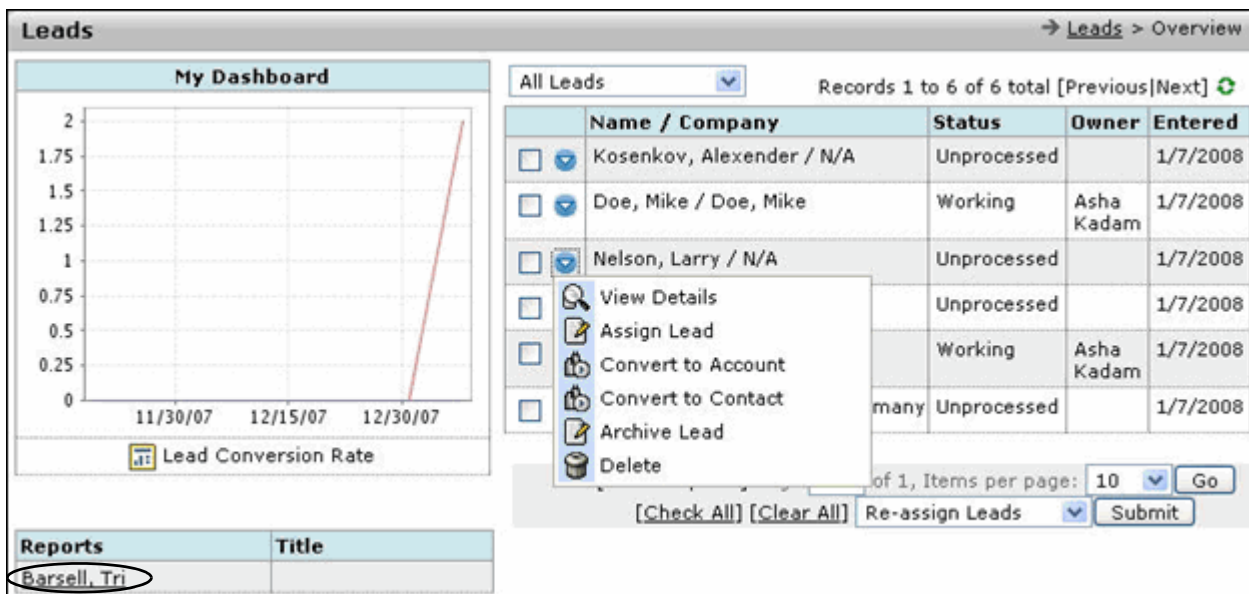


Figure 4.2 Leads Dashboard

**My Dashboard** displays a graph that represents the Lead Conversion Rate — an indicator of the number of leads being turned into valuable contacts on a daily basis.

The graph considers all users who report to you. The components of the graph are explained as follows:

- The blue line represents the total number of conversions done by you and your subordinates.
- The red line represents the number of conversions done by your subordinates.

- The difference between the two values, which is represented by both lines at any point on the graph, determines your number of conversions for a specific day.

The table below the graph contains a list of user links for staff members who report to you. You can view any of your subordinates' dashboards by clicking the links located below the graph, as shown in [Figure 4.2](#). The selected employee's dashboard displays a graph with a red line.

Clicking **Up one level** brings you back to your own dashboard page. This drill-down feature enables you to track the prospect conversion performance of your subordinates.

The leads list to the right of the graph displays the leads that are registered in the application. You can decide to view the following information:

- **All Leads** - all the leads registered in the application.
- **Owned/Read Leads** - filters the list to display leads that are owned by you, or the ones that have been read.

The leads dashboard displays information on leads and accounts (converted prospects) in a single list. All accounts have the status **Working**. Leads can have a status of **Unprocessed**, **Assigned**, or **Archived**. The actions that can be performed on a lead are:

- **View Details** - enables you to view details of the lead.
- **Reassign/Assign Lead** - enables you to assign the lead to any user, who has access to the **Leads** module in the system.
- **Convert to Account** - enables you to convert a lead into an account, and create an action plan to work on the new account. You can either create a new account or associate the lead to an existing account.
- **Convert to Contact** - enables you to convert a lead into a contact. You can then add activities, messages, documents, and opportunities to the contact.
- **Archive Lead** - enables you to mark the lead as **Archived** to indicate that the marked lead is not useful.

Archived leads can be deleted at a later date.

- **Delete** - enables you to delete the lead from the system. Selecting this option displays a pop-up window to confirm the deletion of the lead.

These options enable you to work with leads while having a complete overview in the dashboard. You can also select multiple leads by selecting the respective checkboxes. This enables you to perform an action on all the selected leads, as shown in [Figure 4.3](#).

Leads → Leads > Overview

**My Dashboard**

Lead Conversion Rate

All Leads Records 1 to 6 of 6 total [Previous|Next] ↻

	Name / Company	Status	Owner	Entered
<input type="checkbox"/>	Kosenkov, Alexander / N/A	Unprocessed		1/7/2008
<input checked="" type="checkbox"/>	Doe, Mike / Doe, Mike	Working	Asha Kadam	1/7/2008
<input checked="" type="checkbox"/>	Nelson, Larry / N/A	Unprocessed		1/7/2008
<input type="checkbox"/>	Nelson, Larry / N/A	Unprocessed		1/7/2008
<input type="checkbox"/>	Fenton, Beth / Focus Tech	Working	Asha Kadam	1/7/2008
<input type="checkbox"/>	Barsell, Jeremy / Barsell Germany	Unprocessed		1/7/2008

[Previous|Next] Page  of 1, Items per page:

[Check All] [Clear All]

- Re-assign Leads
- Assign Leads
- Convert to Contact
- Convert to Account
- Delete Leads

Reports	Title
<a href="#">Barsell, Tri</a>	

Figure 4.3 Performing Batch Action on Multiple Leads

## 4.4 Searching for a Lead







The **Search** link located on the menu bar enables you to view leads that match the specified criteria. Clicking **Search** displays the **Search Leads** page, in which you set the search criteria and sort order, as shown in [Figure 4.4](#).

Leads		→ Leads > Search Leads	
<b>Search Leads</b>			
Status	All	▼	
Owner	Any	[Select]	[Clear]
Company	<input type="text"/>		
First Name	<input type="text"/>		
Last Name	<input type="text"/>		
Source	Any	▼	
City	<input type="text"/>		
State/Province	<input type="text"/>		
Country	-- None --	▼	
Postal Code	<input type="text"/>		
Entered Date between	<input type="text"/>	and	<input type="text"/>
Site	All Sites	▼	
Sort Order	Newest First	▼	
<input type="button" value="Get Next Lead"/> <input type="button" value="View List"/> <input type="button" value="Clear"/>			

**Figure 4.4 The Search Leads Page**

Clicking **Get Next Lead** displays the next available lead in the system that matches the search criteria, as shown in [Figure 4.5](#). This option enables you to bypass the leads list and work directly on a specific lead.















Maksim Aleksandrov SAP Labs LLC → Leads > Search Form > Search Results > Lead Details

**Lead Status**

Status	Unprocessed
Assigned To	Sung Chung
Source	Other
Import Name	TechTarget Whitepaper Campaign

**Contact Information**

Name	Maksim Aleksandrov    
Role	None
Title	Software Developer
Company	SAP Labs LLC    
Phone Numbers	Business  +1 (650) 947-8938 
Email Addresses	maleksan@hotmail.com Business    
Addresses	Business 141 Del Medio Avenue, Apt.214 Mountain View, CA 94040 UNITED STATES
Notes	Team collaboration
Entered	12/18/2007 4:34 PM

Continue to next lead after assigning, trashing or skipping lead

**Details**  
 History  
 Action Plans  
 Activities  
 Messages  
 Documents  
 Opportunities

Figure 4.5 The Lead Details Page

The **Continue to next lead after assigning, trashing or skipping lead** checkbox is displayed, as shown in [Figure 4.5](#). Selecting this option causes the details of the next available lead that satisfy your original search criteria to be displayed once you assign, trash, or skip the lead which you are viewing. In case you do not select this option and assign, trash, or skip the lead, then you will be returned to the leads list instead of the **Details** page for the next lead.

Clicking **View List** displays all the leads that match the search criteria, as shown in [Figure 4.6](#).



Leads								
→ Leads > Search Form > Search Results								
0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z								
Records 1 to 6 of 6 total [Previous Next] ↻								
	Company	Name	City	Zip	Potential	Business Segment	Status	Owner
<input type="checkbox"/>	<a href="#">Barsell Germany</a>	Barsell, Jeremy			\$0	-- None --	Unprocessed	
<input type="checkbox"/>	<a href="#">Doe, Mike</a>	Doe, Mike			\$0	-- None --	Working	Asha Kadam
<input type="checkbox"/>	<a href="#">Focus Tech</a>	Fenton, Beth			\$0	-- None --	Working	Asha Kadam
<input type="checkbox"/>	<a href="#">Not available</a>	Kosenkov, Alexander			\$0	-- None --	Unprocessed	
<input type="checkbox"/>	<a href="#">Not available</a>	Nelson, Larry			\$0	-- None --	Unprocessed	
<input type="checkbox"/>	<a href="#">Not available</a>	Nelson, Larry			\$0	-- None --	Unprocessed	

[Previous|Next] Page 1 of 1, Items per page: 10 Go  
 [Check All] [Clear All] Re-assign Leads Submit

Figure 4.6 The Search Results Page

For more details, refer to [Section 4.5.1, “Viewing Lead Details”](#).






Clicking **Clear** clears the form and enables you to specify new search criteria.

You can also perform the following actions on the **Leads Details** page:

- **History** - view list of actions performed on the lead in the past.
- **Action Plans** - create action plans for the lead.
- **Activities** - add and schedule activities for the lead.
- **Messages** - send and view messages related to the lead.
- **Documents** - view and add the documents attached to the lead.
- **Opportunities** - view and add the opportunities related to the lead.







#### 4.4.1 Understanding the Contact Preference Icons

On the **Lead Details** page, the contact preference icons are displayed, as shown in [Figure 4.7](#). For the selected lead, these icons suggest the lead’s preferences for being contacted. These icons stand for:

-  Phone
-  Fax
-  Email
-  Instant message
-  Text message
-  Postal address

If you specify any of these contact details while adding a lead, the respective icons are highlighted on the **Leads Details** page.















Maksim Aleksandrov SAP Labs LLC → Leads > Search Form > Search Results > Lead Details

**Lead Status**

Status	Unprocessed
Assigned To	Sung Chung
Source	Other
Import Name	TechTarget Whitepaper Campaign

**Contact Information**

Name	Maksim Aleksandrov	   
Role	None	
Title	Software Developer	
Company	SAP Labs LLC	   
Phone Numbers	Business	 +1 (650) 947-8938 
Email Addresses	<a href="mailto:maleksan@hotmail.com">maleksan@hotmail.com</a>	Business    
Addresses	Business	141 Del Medio Avenue, Apt.214 Mountain View, CA 94040 UNITED STATES
Notes	Team collaboration	
Entered	12/18/2007 4:34 PM	







Continue to next lead after assigning, trashing or skipping lead

**Details**

Figure 4.7 Contact Preference Icons

In some cases a lead is not interested in receiving emails. In such cases, you must select the **No Email Please** option and the mail icon will be crossed, as shown in [Figure 4.8](#). Similarly, you can specify preferences for fax, phone, instant message, text message, and postal address.















Maksim Aleksandrov SAP Labs LLC → Leads > Search Form > Search Results > Lead Details

**Lead Status**

Status	Unprocessed
Assigned To	Sung Chung
Source	Other
Import Name	TechTarget Whitepaper Campaign

**Contact Information**

Name	Maksim Aleksandrov    
Role	None
Title	Software Developer
Company	SAP Labs LLC    
Phone Numbers	Business  +1 (650) 947-8938 
Email Addresses	maleksan@hotmail.com Business    
Addresses	Business 141 Del Medio Avenue, Apt.214 Mountain View, CA 94040 UNITED STATES
Notes	Team collaboration
Entered	12/18/2007 4:34 PM

Continue to next lead after assigning, trashing or skipping lead

**Details**  
 History  
 Action Plans  
 Activities  
 Messages  
 Documents  
 Opportunities

Figure 4.8 Understanding Contact's Preferences with Contact Preference Icons

## 4.5 Adding a Lead

To add a lead, click **Add** on the menu bar. The **Add Lead** page is displayed, as shown in [Figure 4.9](#).

**Leads** → [Leads](#) > Add Lead

**Add Lead**

Assign To	None Selected [Select] [Clear]
Lead Type(s)	None Selected [Select]
Salutation	-- None --
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/> *
Additional Names	<input type="text"/>
Nickname	<input type="text"/>
Birthday	<input type="text"/>
Company	<input type="text"/> - Last Name or Company is a required field
Title	<input type="text"/>
Role	<input type="text"/>
Stage	-- None --
Source	None
Rating	None
Industry	None
DUNS Type	<input type="text"/>
Year Started	<input type="text"/>
No. of Employees	<input type="text"/>
Revenue	USD <input type="text" value="0"/>
Potential	USD <input type="text" value="0"/>

**Figure 4.9 The Add Lead Page**

To add a lead, enter the following details:


- Lead name and business names
- Lead's company and title

- Stage of the lead. You can add the options in the **Stage** field in the **Admin** module. In the **Admin** module, you can set the options in the **Stage** field on the **Admin > Configure Modules > Leads > Lookup Lists > Edit List** page
- Source of information, rating, and comments
- Contact information and details, such as phone numbers, e-mail addresses, IM addresses, text message address, and postal addresses
- Other relevant information, such as revenue, potential, year started, SIC description, Data Universal Numbering System (DUNS) number, and type  
DUNS is a unique nine-character identification number provided to all registered vendors by Dun and Bradstreet.

By default, the status of a newly added lead is **Unprocessed**. Unprocessed lead records are made available to all users with access to lead records.

### 4.5.1 Viewing Lead Details

You can view the lead details from the **Dashboard** page or from the **Search Results** page.

When you click  beside the lead name on any of these pages, a context menu is displayed. To view the lead details, select **View Details** from this menu. The lead's contact information and current status is displayed, as shown in [Figure 4.10](#).

Maksim Aleksandrov SAP Labs LLC → Leads > Search Form > Search Results > Lead Details

Lead Status

Status	Unprocessed
Assigned To	Sung Chung
Source	Other
Import Name	TechTarget Whitepaper Campaign

Contact Information

Name	Maksim Aleksandrov	Google	YAHOO!	msn	ASK JeeVES	
Role	None					
Title	Software Developer					
Company	SAP Labs LLC	Google	YAHOO!	msn	ASK JeeVES	
Phone Numbers	Business	+1 (650) 947-8938				
Email Addresses	maleksan@hotmail.com	Business	Google	YAHOO!	msn	ASK JeeVES
Addresses	Business	141 Del Medio Avenue, Apt.214				
		Mountain View, CA				
		94040				
		UNITED STATES				
Notes	Team collaboration					
Entered	12/18/2007 4:34 PM					

Continue to next lead after assigning, trashing or skipping lead

Details  
History  
Action Plans  
Activities  
Messages  
Documents  
Opportunities

Figure 4.10 Lead Details

Clicking the logos of popular search engines, such as Google, Yahoo, MSN, and Ask Jeeves, as shown in Figure 4.10, launches a search based on the field's contents, using the corresponding search engine.

While viewing lead's details, you can select:

- Convert to Contact** - to turn the lead into a general contact.

The lead is then displayed as a regular contact in **Leads** and you can perform all contact-related operations, based on your permissions, as shown in Figure 4.11. The contact details of the lead are also transferred to the **Contact** module. Converting a lead into a contact enables you to associate **Opportunities** and **Activities** against this lead that has been converted into a contact.
- Convert to Account** - to turn the lead into an account, as shown in Figure 4.10.

While converting a lead into an account, you can either create a new account or associate the lead to an existing account. The contact details of the lead are also transferred to the **Accounts** module. The lead is displayed as an account and you can perform all account related operations, based on your permissions. Converting a lead to an account enables you to create and work on action plans

for the accounts, opportunities, and activities against the lead that was converted into an account.

- **Re-Assign Lead** - to re-assign the lead to a specific user having access to the **Leads** module.
- **Archive Lead** - to set the status of the lead as **Archived**, when you consider the lead as not worth following-up.
- **Skip this Lead** - if you have not taken a decision about a lead, and you would like to proceed to the next lead.
- **Modify** - to modify the details of the lead.
- **Delete** - to delete a lead, if you do not require the lead in future. Selecting this option displays a pop-up window to confirm the deletion of the lead.

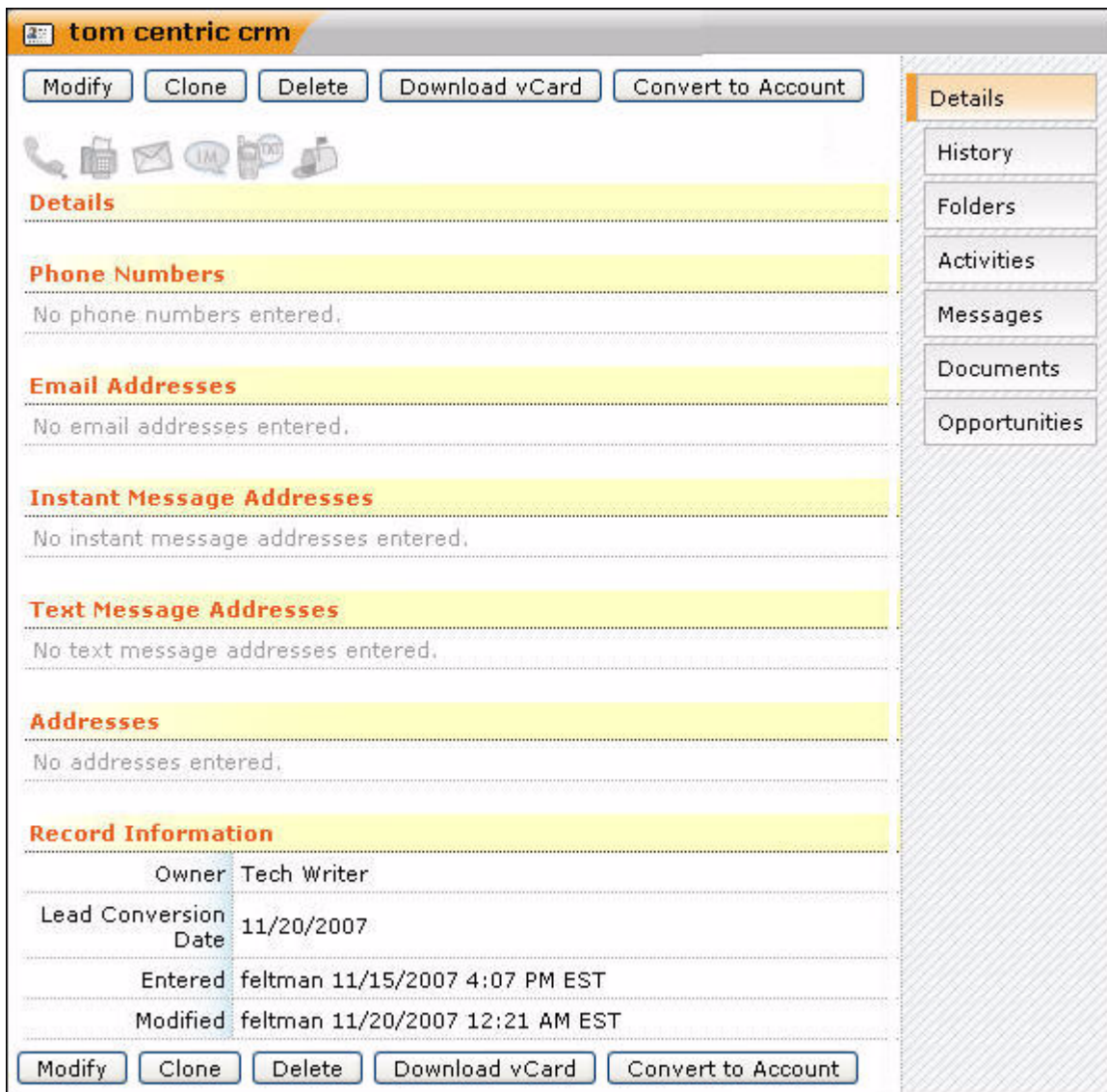


Figure 4.11 Convert to Contact

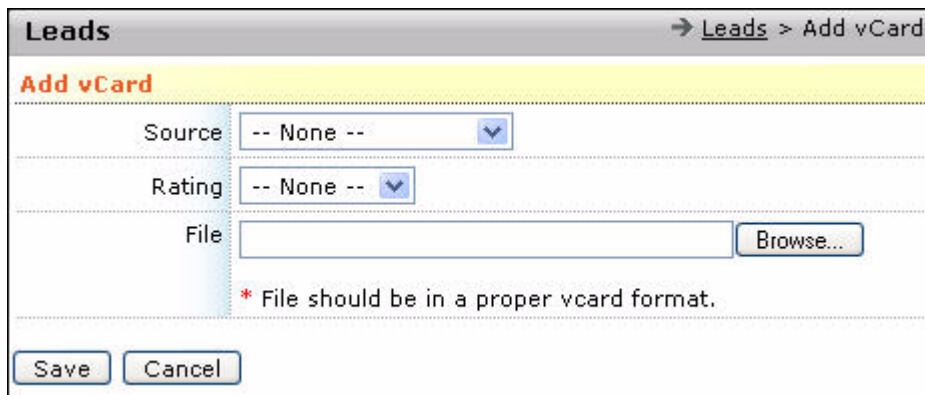
## 4.6 Adding a vCard

A vCard is an electronic business card. You can add a vCard of a lead. You can also add a lead by first adding a vCard of the lead.

To add a vCard:

1. Click **Add vCard** on the menu bar.

The **Add vCard** page is displayed, as shown in [Figure 4.12](#).



The screenshot shows a web form titled "Leads" with a breadcrumb "Leads > Add vCard". The form has a yellow header "Add vCard". It contains three fields: "Source" with a dropdown menu set to "-- None --", "Rating" with a dropdown menu set to "-- None --", and "File" with a text input field and a "Browse..." button. Below the fields is a red asterisk warning: "\* File should be in a proper vcard format.". At the bottom are "Save" and "Cancel" buttons.

Figure 4.12 Adding vCard

2. Select the source of the vCard, such as **Advertising**, **Employee Referral**, and so on.
3. Specify the rating of the lead. **Rating** specifies the chances of a lead being a prospective client. Some of the options of the **Rating** field can be "Hot" and "Cold". You can add the options in the **Rating** field in the **Admin** module on the **Admin > Configure Modules > Leads > Lookup Lists** page.
4. Select the site of the lead. You can add the options in the **Site** field in the **Admin** module on the **Admin > Configure Modules Website > Lookup Lists** page.
5. Click **Browse** to locate the vCard on your system.
6. Click **Save** to add the vCard.

The **Add Lead** page is displayed. The field values that are available in the vCard are automatically populated. For more details, refer to [Section 4.5, "Adding a Lead"](#).

## 4.7 Importing Leads

The **Leads** module provides an **Import** feature that enables you to import lead details from an external source, saved in a Comma Separated Values (.CSV) file in ConcourseSuite. This module also provides record validation by enforcing certain business rules during the import process.

To import a lead:

1. Click **Import** on the menu bar.
2. The **View Imports** page is displayed, as shown in [Figure 4.13](#).



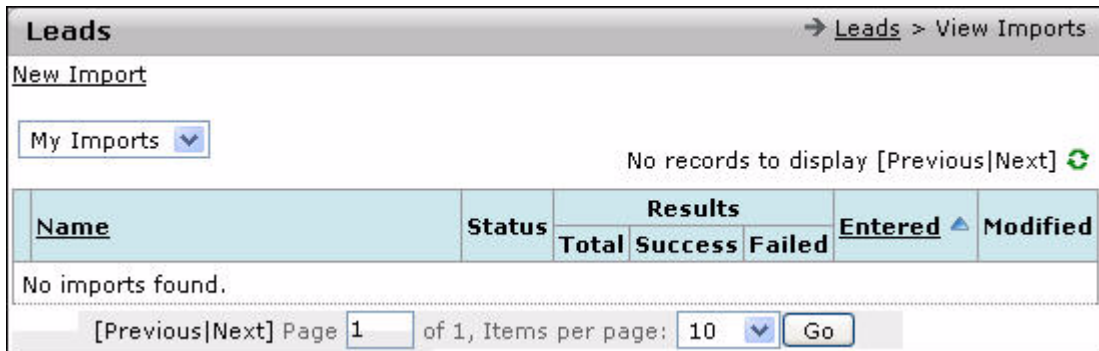


Figure 4.13 The View Imports Page

3. Click **New Import**.

The **New Import** page is displayed, as shown in Figure 4.14. Enter the required information for import, such as **Name**, **Description**, **Comments**, **Source**, **Rating**, and **Site**.

Figure 4.14 The Lead Import Page

4. Click **Browse** and select the file to be imported.

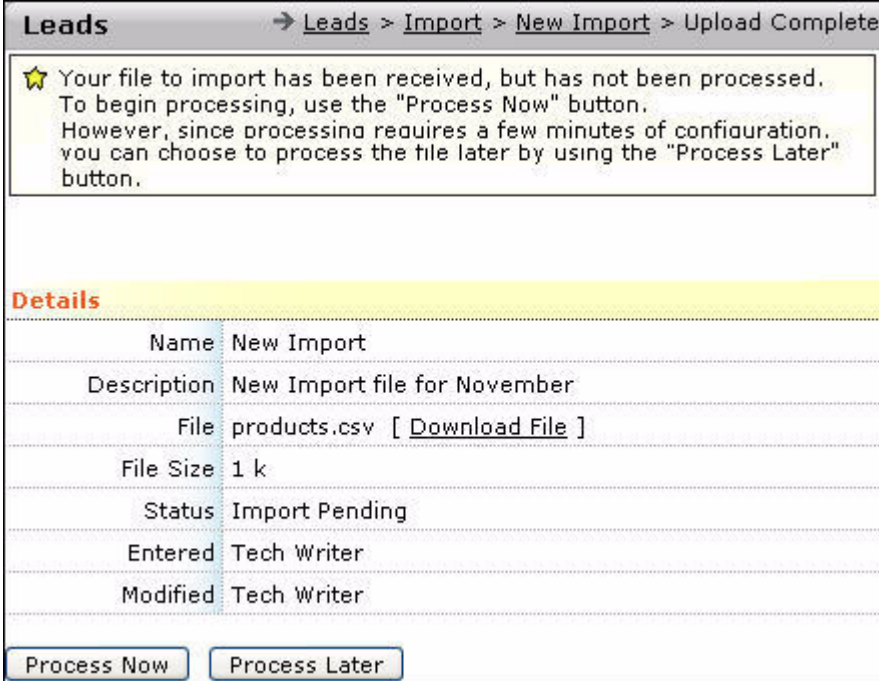
---

**Note:** The file must be a valid .CSV file, and its first line must contain column names to enable data mapping to the ConcourseSuite database.

---

5. Click **Save** to upload the import file to the database.

If no error occurs during the upload, the **Upload Complete** page is displayed, as shown in [Figure 4.15](#).



The screenshot shows a web interface for 'Leads' with a breadcrumb trail: Leads > Import > New Import > Upload Complete. A message box contains a star icon and text: 'Your file to import has been received, but has not been processed. To begin processing, use the "Process Now" button. However, since processing requires a few minutes of configuration, you can choose to process the file later by using the "Process Later" button.' Below this is a 'Details' section with a table:

Name	New Import
Description	New Import file for November
File	products.csv [ <a href="#">Download File</a> ]
File Size	1 k
Status	Import Pending
Entered	Tech Writer
Modified	Tech Writer

At the bottom of the details section are two buttons: 'Process Now' and 'Process Later'.

**Figure 4.15 Lead Import - File Upload Complete**

6. To view a lead import's details, select any one:
  - **Process Now** - to initiate processing of records available in the imported.CSV file.
  - **Process Later** - to save an import session for processing later.

Selecting the **Process Now** option takes you to the **Process Import** page.

7. Field Mappings enable you to define a correspondence between fields from your import file and ConcourseSuite's lead attributes, as shown in [Figure 4.16](#).

**Leads** → Leads > View Imports > Import Details > Process Import

Process Cancel

**Import Properties**

Name	New Import
File	products.csv
File Size	1 k
Entered	Tech Writer 11/26/2007 5:25 AM
Modified	Tech Writer 11/26/2007 5:25 AM
Owner	Tech Writer [Change Owner] [Clear]

**First 5 lines of the import file**

Line 1	Category, Product
Line 2	Cameras,Nikon
Line 3	Cameras,Sony
Line 4	Computers,Dell
Line 5	Computers,HP

**General Errors/Warnings**

No errors/warnings found.

**Field Mappings**

Field	Maps to	Errors/Warnings
Category	<input type="text"/>	
Product	<input type="text"/>	

Process Cancel

**Figure 4.16 The Lead Import Processing Page**

- Click **Process** to begin the processing of records in the .CSV file.

You are redirected to the **View Imports** page, where a list of all the imported files is displayed. A detailed list containing the following details is displayed, as shown in [Figure 4.17](#):

Leads							→ Leads > View Imports
New Import							
My Imports ▼							
							Records 1 to 1 of 1 total [Previous Next] ↻
	Name	Status	Results			Entered ▲	Modified
			Total	Success	Failed		
▼	<a href="#">New Import</a>	Approved	3	3	0	11/20/2007 12:38 AM	11/20/2007 12:52 AM

[Previous|Next] Page  of 1, Items per page:  ▼

Figure 4.17 Viewing the List of Imported Files

- Name
- Status
- Results
- Last date of entry
- Modification details

The **Status** field describes one of the following states of the import sessions:

- **Import Pending** - indicates that the import file is uploaded, but not yet processed.
- **Running** - indicates that the import file is being processed.
- **Pending Approval** - indicates that the import file has been successfully processed, but the results have to be approved before the leads are actually made available to all.
- **Approved** - indicates that the import results have been reviewed by a system user and approved.

The **Results** field displays the number of total records, successful and unsuccessful records, corresponding to the imported file.

9. Click the name of the imported file, as shown in [Figure 4.17](#).  
The **Import Details** page is displayed, as shown in [Figure 4.18](#).

Leads	
<input type="button" value="Approve"/> <input type="button" value="Delete"/> <input type="button" value="View Results"/>	
<b>Details</b>	
Name	New Import
Description	New import file for November
File	account.csv [ <a href="#">Download File</a> ]
File Size	1 k
Status	Pending Approval
Imported Records	3
Failed Records	0
Site	-- None --
Entered	Tech Writer 11/20/2007 12:38 AM
Modified	Tech Writer 11/20/2007 12:52 AM
<input type="button" value="Approve"/> <input type="button" value="Delete"/> <input type="button" value="View Results"/>	

**Figure 4.18 Lead Import Details**

- Click **Approve** to approve the imported file. Approving the import makes the leads available to all the users with access to the **Leads** module.

The **Import Details** page with the option to view the results is displayed in [Figure 4.19](#).

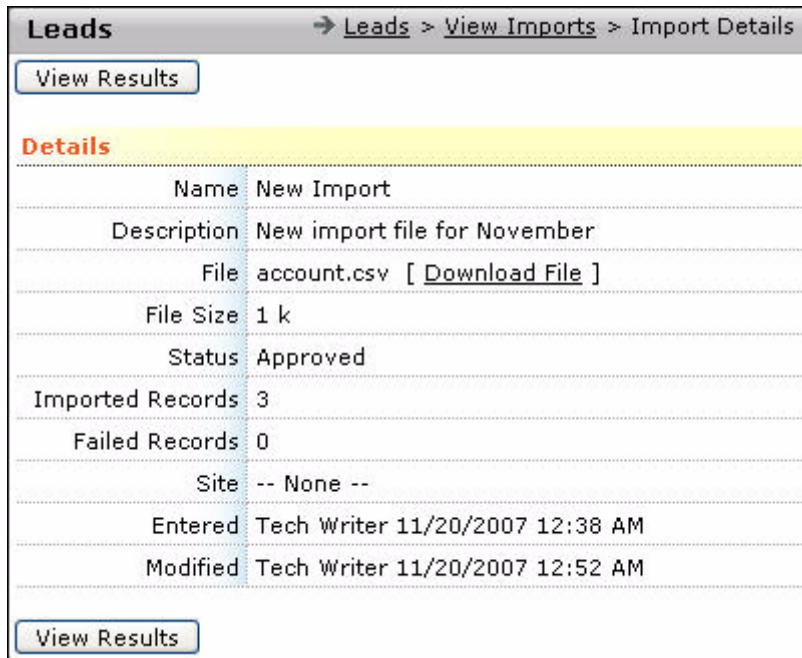


Figure 4.19 Viewing the Status of the Imported File

11. Click **View Results**.

The **View Results** page, displaying the records of the imported file is shown in [Figure 4.20](#).



Figure 4.20 Lead Import Results

## 4.8 Exporting Leads

The **Export** feature enables you to export lead details. Click **Export** on the menu bar, to view a list of all data that has been exported, as shown in [Figure 4.21](#).

The list also displays the following details:

- Size of the exported data
- Date of creation of data
- Person who created the data

The available sections in the export leads feature are:

- **My Exported Data**
- **All Exported Data**

Subject	Size	Create Date	Created By	D/L
Test 1	1k	11/20/2007 1:12 AM	Tech Writer	0
Unprocessed Leads	1k	11/20/2007 1:19 AM	Tech Writer	0

**Figure 4.21 Exported Data List**

To export new data:

1. Click the **Generate new export** link, as shown in [Figure 4.21](#).

The **New Export** page is displayed, as shown in [Figure 4.22](#).

**Figure 4.22 The New Export Page**

2. Specify the type and criteria, enter the subject, select the fields to be included, and specify the field for sorting the contacts. Click **Generate** to generate the new export.

The exported file is listed on the **Export Data** page, as shown in [Figure 4.23](#). The data can be viewed or downloaded as a .CSV file.

**Leads** → Leads > Export Data

Generate new export 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

My Exported Data Records 1 to 2 of 2 total [Previous|Next]

	Subject	Size	Create Date	Created By	D/L
	<u>Test 1</u>	1k	11/20/2007 1:12 AM	Tech Writer	0
	<u>Unprocessed Leads</u>	1k	11/20/2007 1:19 AM	Tech Writer	0

- View Data
- Download as .CSV File
- Delete

[Previous|Next] Page  of 1, Items per page:

Figure 4.23 Viewing the New Export File



## Managing Contacts

This chapter provides information about the **Contacts** module of ConcourseSuite. The **Contacts** module enables you to manage information about your contacts. You can store contact details and monitor their activities.

This chapter consists of the following sections:

- ❑ [Section 5.1, “How Does This Module Help You?”](#)
- ❑ [Section 5.2, “Understanding the Dashboards Page”](#)
- ❑ [Section 5.3, “Searching for Contacts”](#)
- ❑ [Section 5.4, “Viewing History”](#)
- ❑ [Section 5.5, “Using Contact Folders”](#)
- ❑ [Section 5.6, “Recording and Planning Activities”](#)
- ❑ [Section 5.7, “Sending Messages”](#)
- ❑ [Section 5.8, “Adding and Accessing Documents”](#)
- ❑ [Section 5.9, “Viewing Opportunities”](#)
- ❑ [Section 5.10, “Importing Contacts”](#)
- ❑ [Section 5.11, “Exporting Contacts”](#)

### 5.1 How Does This Module Help You?

ConcourseSuite models the customer life cycle, which starts with contacts. Often, a customer begins as a casually met contact, and may later turn into an account. For example, in a retail setting, potential customers may walk in to browse your merchandise. Some customers may purchase immediately and others may not, but capturing relevant information about all of them will make it easier to convert contacts into accounts. Contacts may also include general acquaintances, competitors, shareholders, and vendors.

The **Contacts** module helps in tracking the following details:

- Name
- Email addresses
- Phone numbers
- Mailing Addresses

- Notes
- Calls
- Meetings
- Appointments
- Faxes

The **Contacts** module gathers all opportunity records associated with a contact in one place. This module also provides a historical record of all messages sent from the **Communications** module.

You can define and populate as many folders for contacts as you need. The **Add Contacts** page enables you to enter contact information. These capabilities are discussed in detail in the subsequent sections.

## 5.2 Understanding the Dashboards Page

You can access the **Contacts** module by selecting the **Contacts** tab, as shown in [Figure 5.1](#).



Figure 5.1 The Contacts Menu Bar

The **Dashboards** page is the default page in the **Contacts** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 5.3 Searching for Contacts

When you click **Search** on the **Contacts** tab, the **Search Contacts** page is displayed, as shown in [Figure 5.2](#). You can search for contacts by specifying the search criteria. The more information you enter in the search query form, the more refined your search becomes.

You can search for a contact by entering one or more of the following details:

- **First Name**
- **Middle Name**
- **Last Name**
- **Company**
- **Title**
- **Contact Type**
- **Contact Source**, which includes the following options:
  - **My Contacts** - your contacts

- **All Contacts** - all the contacts in the system
- **Controlled Hierarchy Contacts** - contacts of a hierarchy.  
For example, if you are a manager, you can view contacts of employees reporting to you.

- **Site**

When you enter a partial name in an input field, the system executes the search and returns all results with your search term anywhere in the field. For example, entering "or" in the first name field displays all contacts with "or" in their first names, such as George, Gordon, and Lorna. To view all the contacts in the system, leave all fields blank, and click **Search**.

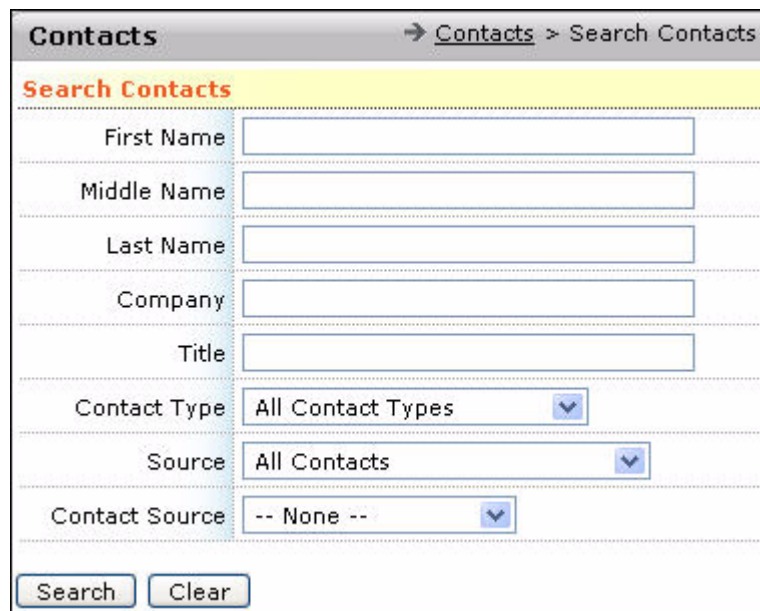
---

**Caution:** In applications with a large contact database, using blank fields to search for contacts may be time consuming.

---

**Contact Type** provides many options to refine your search. The options available are:

- **Contact Types** - This category includes options, such as acquaintances, competitors, shareholders, and vendors.
- **Account Contact Types** - This category includes all contacts associated with an account.
- **All Contact Types** - This category includes **Contact** types and **Account** types.




The screenshot shows a web interface titled "Contacts" with a breadcrumb trail "Contacts > Search Contacts". Below the title is a yellow header "Search Contacts". The form contains several input fields: "First Name", "Middle Name", "Last Name", "Company", and "Title", each with a corresponding text input box. Below these are three dropdown menus: "Contact Type" (set to "All Contact Types"), "Source" (set to "All Contacts"), and "Contact Source" (set to "-- None --"). At the bottom of the form are two buttons: "Search" and "Clear".

**Figure 5.2** The Search Contacts Page

### 5.3.1 Viewing Contact Search Results


The **Search Results** page, resulting from a set of criteria specified during the search, is shown in [Figure 5.3](#). The search results can be sorted by name, company, or site using the field headers at the top of the results page.





























When you click , a context menu is displayed, which contains the following task options:

- **View Details** - to view the details of the contact
- **Modify** - to edit the details of the contact
- **Move** - to move the contact to the **Accounts** module
- **Clone** - to duplicate the contact
- **Download vCard** - to download the details of the contact in vCard format
- **Send Address Request** - to send a message to the contact
- **Delete** - to remove the contact from the database

**Contacts** → [Contacts](#) > Search Results

Add a Contact [D](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Records 1 to 10 of 24 total [[Previous](#) | [Next](#)] 

	Name	Company	Phone(s)	Owner
	<a href="#">Abderahman, Seif Eldin</a> 	Abderahman, Seif Eldin	20123251387 (Business)	Sung Chung
	<a href="#">Alagheband, Alireza</a> 	Mahva Technologies	982188883893 (Business)	Sung Chung
	<a href="#">Barsell, Jeremy</a>  <a href="#">[Account]</a>	Barsell, Jeremy		Tri Barsell
	 View Details	Burgess, Alexander	 <a href="#">(336) 896-1360</a> 	Sung Chung
	 Modify	Butts, Thomas	 <a href="#">(412) 573-0111</a> 	Sung Chung
	 Move	Capsuo, Bruce	 <a href="#">(954) 957-9961</a> 	Sung Chung
	 Clone	Concursive		Sung Chung
	 Send Address Request	ClaudiaTEST, ClaudiaTest		Claudia Wade
	 Download vCard	Dane, John		Asha Kadam
	 Delete	American Bank		Asha Kadam
	<a href="#">Doe, John</a> 	American Bank		Asha Kadam


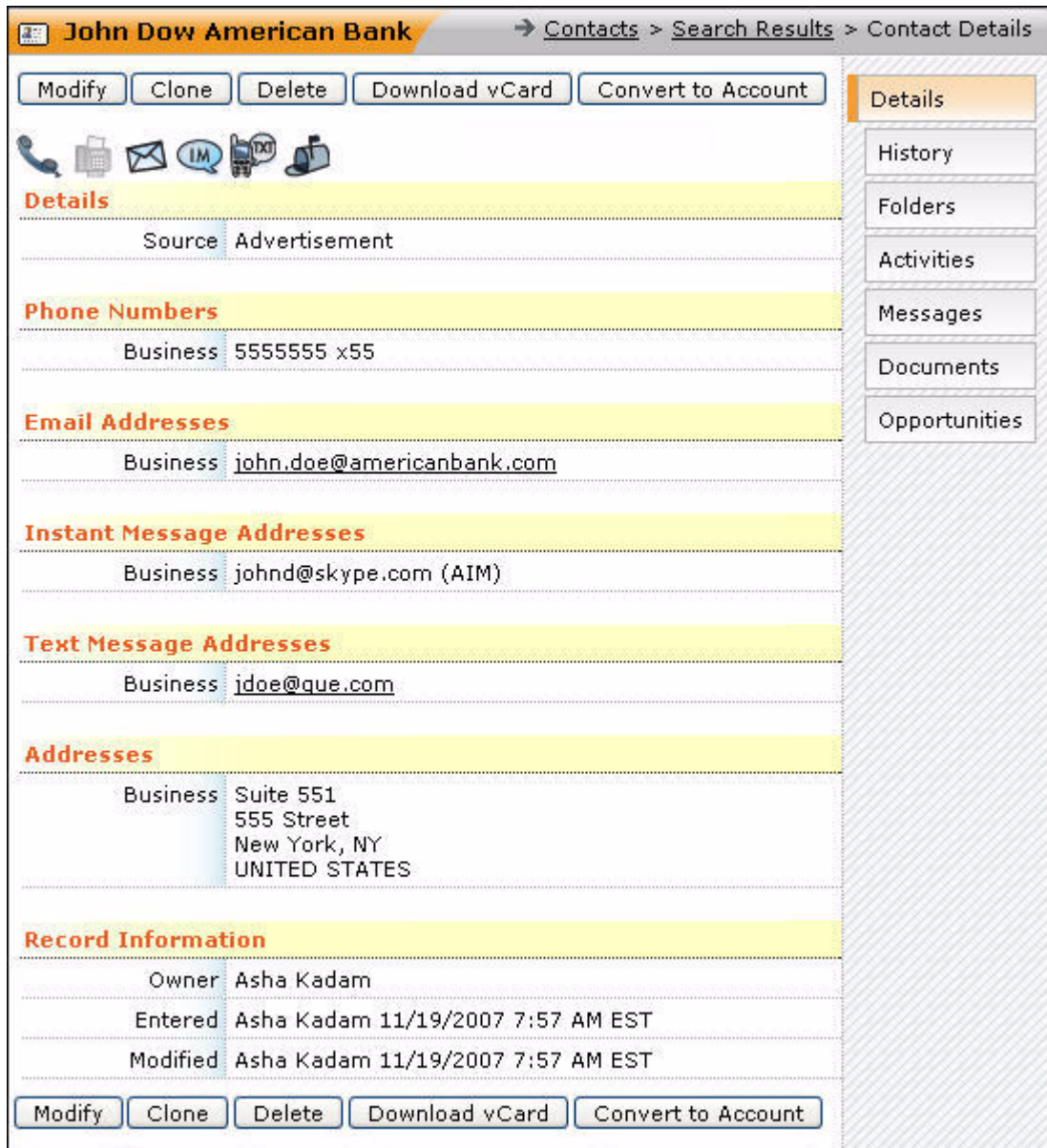
[[Previous](#) | [Next](#)] Page  of 3, Items per page:  

Figure 5.3 Contact Search Results

### 5.3.2 Viewing Contacts

Clicking a contact name in the search results displays the **Contact Details** page, as shown in [Figure 5.4](#).



**Figure 5.4 Contact Details**

You can modify, clone, delete, or download vCard of the contact using the options available on the **Contact Details** page. In case the contact is imported, the import name is displayed on the **Contact Details** page. For more details, refer to [Section 5.10, "Importing Contacts"](#). The **Contact Details** page also contains the following sub-tabs:

- **Details** - Select this sub-tab to view the details of the contact.
- **History** - Select this sub-tab to view information related to a contact till date. For more details, refer to [Section 5.4, "Viewing History"](#).
- **Folders** - Select this sub-tab to view the all the folders created in this module. For more details, refer to [Section 5.5, "Using Contact Folders"](#).

- **Activities** - Select this sub-tab to record and schedule activities. For more details, refer to [Section 5.6, “Recording and Planning Activities”](#).
- **Messages** - Select this sub-tab to view the messages sent to and received from the contacts. For more details, refer to [Section 5.7, “Sending Messages”](#).
- **Documents** - Select this sub-tab to view the list of folders and attached documents relevant to the contact. For more details, refer to [Section 5.8, “Adding and Accessing Documents”](#).
- **Opportunities** - Select this sub-tab to view opportunities associated with this contact. For more details, refer to [Section 5.9, “Viewing Opportunities”](#).

### 5.3.2.1 Understanding the Contact Preference Icons

On the **Contact Details** page, the contact preference icons are displayed, as shown in [Figure 5.4](#). For the selected contact, these icons suggest the preferences for being contacted. These icons stand for:

-  Phone
-  Fax
-  Email
-  Instant message
-  Text message
-  Postal address

If you specify any of these contact details while adding a contact, the respective icons are highlighted on the **Contact Details** page. For more details, refer to [Section 4.4.1, “Understanding the Contact Preference Icons”](#).

### 5.3.3 Adding a Contact

You can add a new contact by:

- clicking **Add a Contact** on the **Search Result** page, as shown in [Figure 5.3](#).
- clicking **Add** on the menu bar.

To add a contact, click **Add** on the menu bar. The **Add Contact** page is displayed, as shown in [Figure 5.5](#).

**Contacts** → [Contacts](#) > Add Contact

**Add a Contact**

Contact Category:
  General Contact  
 Associated with Account: None Selected [[Select](#)]

Contact Type(s):
 None Selected [[Select](#)]

Access Type: Controlled-Hierarchy

Salutation: -- None --

First Name:

Middle Name:

Last Name:  \*

Additional Names:

Nickname:

Birthday:

Company:  - Last Name or Company is a required field

Title:

Role:

Source: None

Note: All international phone numbers must be preceded by a "+" symbol.

**Phone Numbers**

Phone1	<span>Business</span>	<input type="text"/>	ext. <input type="text"/>	<input type="radio"/> Primary
Phone2	<span>Business</span>	<input type="text"/>	ext. <input type="text"/>	<input type="radio"/> Primary
Phone3	<span>Business</span>	<input type="text"/>	ext. <input type="text"/>	<input type="radio"/> Primary

**Figure 5.5 The Add Contact Page**

1. Enter the following details:
  - Contact name
  - Company and title
  - Contact details that include the following:
    - Phone numbers

- Email addresses
  - Instant message addresses
  - Text messages addresses
  - Postal addresses
2. Click **Save**.

### 5.3.4 Adding a vCard

You can add a vCard of a contact. This allows you to add a contact. To add a vCard:

1. Click **Add vCard** on the menu bar.  
The **Add vCard** page is displayed, as shown in [Figure 5.6](#).

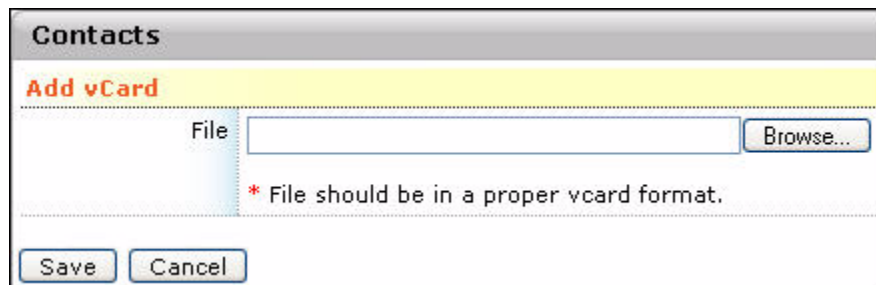


Figure 5.6 Adding a vCard

2. Select the site of the contact. You can add the options in the **Site** field in the **Admin** module on the **Admin > Configure Modules Website > Lookup Lists** page.
3. Click **Browse** to locate the vCard on your system.
4. Click **Save** to add the vCard.

The **Add Contact** page is displayed. The field values that are available in the vCard are automatically populated. For more details, refer to [Section 5.3.3, "Adding a Contact"](#).

### 5.3.5 Modifying Contacts

The **Modify** button on the **Contact Details** page enables you to modify the contact details. Click **Modify** to display the **Modify Contact** page, as shown in [Figure 5.7](#). You can modify the following information:

- **Personal information** - details, such as names and birthday.
- **Official information** - details, such as role and title.
- **Contact information** - details, such as phone numbers, email addresses, mailing address, and IM address.
- **Additional information** - notes.

Click **Update** to save the changes or click **Cancel** to return to previous page without saving the changes.



John Dow American Bank → Contacts > Search Results > Contact Details > Modify Contact

Update Cancel

**Update a Contact**

Reassign To: Kadam, Asha

Contact Category:
  General Contact
  Associated with Account: None Selected [Select]

Contact Type(s): None Selected [Select]

Access Type: Controlled-Hierarchy

Salutation: -- None --

First Name: John

Middle Name:

Last Name: Dow \*

Additional Names:

Nickname:

Birthday:

Company: American Bank - Last Name or Company is a required field

Title:

Role:

Source: None

Note: All international phone numbers must be preceded by a "+" symbol.

**Phone Numbers**

Phone1: Business ext. Primary

Phone2: Business ext. Primary

Phone3: Business ext. Primary

No Phone Calls Please

Details

History

Folders

Activities

Messages

Documents

Opportunities

Figure 5.7 Modifying a Contact

### 5.3.6 Cloning Contacts

Contact cloning is a feature that enables you to add new contacts from the same company without having to re-enter common information, such as company name and address.

You can create another contact similar to the one you are viewing by clicking **Clone** on the **Contact Details** page. The name of the company, email address, mailing address, and phone numbers are entered automatically from the current contact.

### 5.3.7 Deleting Contacts

You can delete a contact that is no longer required by clicking **Delete** on the **Contact Details** page. ConcourseSuite displays a warning to confirm the deletion.

### 5.3.8 Downloading a vCard

A vCard is an electronic business card containing:

- Geographic and time zone information
- Multiple languages support, which enables you to view the details in the language of your choice

You can download a contact's vCard in a .VCF format to your laptop, desktop, and other communication tools, such as phones and palmtops. Click **Download vCard** and select from the options whether you want to open the vCard or save the same, as shown in [Figure 5.8](#).



Figure 5.8 The Download vCard Dialog Box

On selecting **Open**, a pop-up window is displayed, as shown in [Figure 5.9](#).

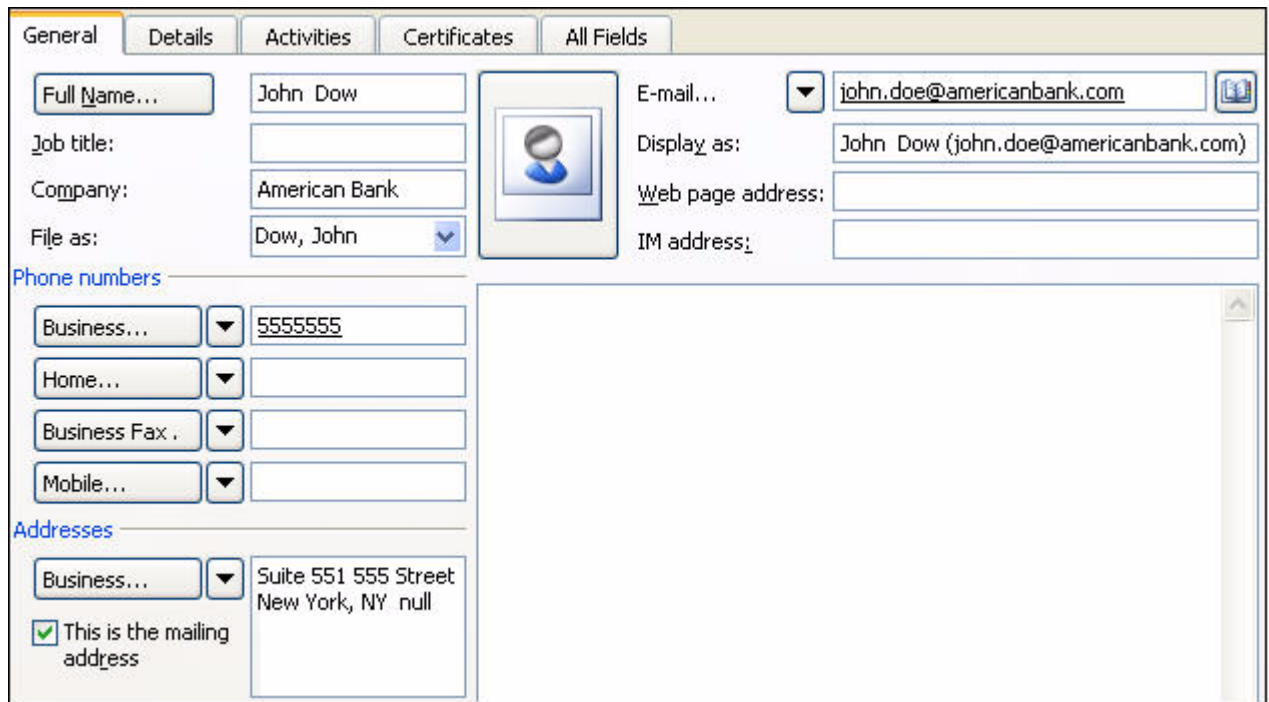
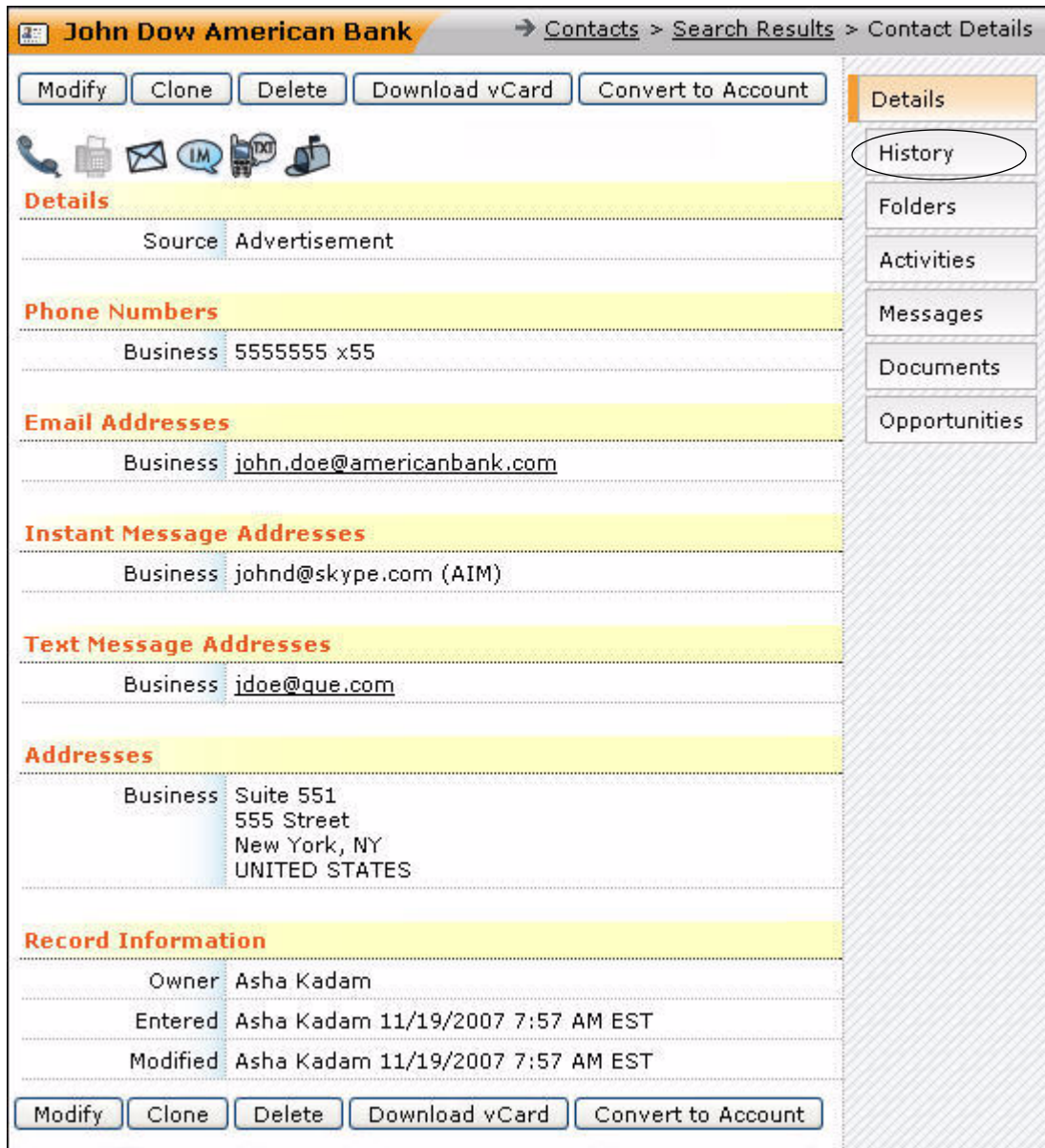


Figure 5.9 Viewing the vCard

## 5.4 Viewing History

You can access the **History** page by clicking the **History** sub-tab on the **Contact Details** page, as shown in [Figure 5.10](#). History enables you to view information related to a contact.



**Figure 5.10 Accessing History from the Contact Details Page**

Using the **History** sub-tab, you can view the history of a contact, for example the activities, tickets, and so on related to the contact. This sub-tab provides the following information, as shown in [Figure 5.11](#):

- Notes
- Activities
- Tickets
- Assets
- Quotes
- Opportunities
- Tasks

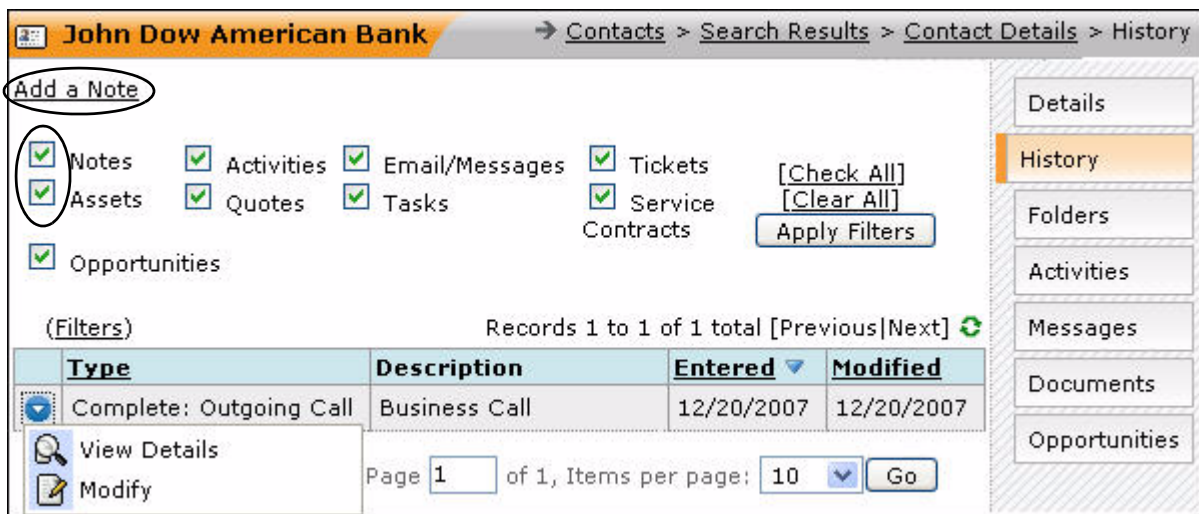
- Service Contracts
- Messages

You can add a note by clicking **Add a Note**, as shown in [Figure 5.11](#).


You can view a specific set of history items by setting a filter. Click **Filters** to set a filter. You can set a filter, by selecting the relevant checkboxes, as shown in [Figure 5.11](#). To activate the filter, click **Apply Filter**.

You have the option of clearing or selecting all the filters. The page displays all the filtered data with the following information:

- Brief description
- Contact information
- Last date of entry
- Last date of modification



**Figure 5.11 Viewing the History Page**

Click  to view a context menu, as shown in [Figure 5.11](#). You can select from the options to view or modify details of each activity.

## 5.5 Using Contact Folders

You can access the **Folders** page by clicking the **Folders** sub-tab on the **Contact Details** page, as shown in [Figure 5.12](#).

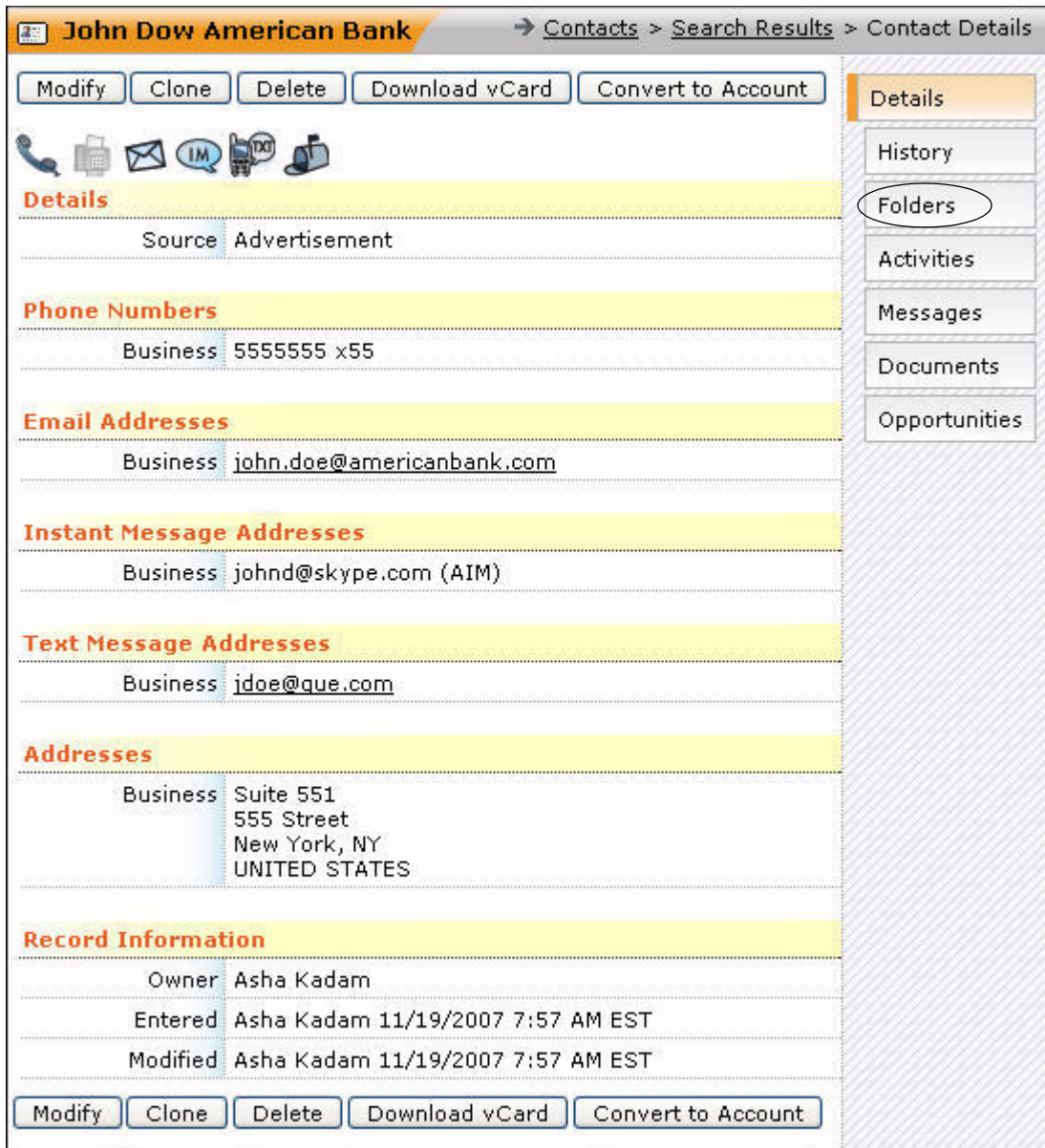


Figure 5.12 Accessing the Folder Page

The **Folders** sub-tab enables you to perform the following tasks:

- Capture and store data that is not available by default on the **Contact Details** page.
- Extend the database with new information.

The **Folders** page contains options to select from the available folders, as shown in [Figure 5.13](#). After selecting the folder, click **Modify** to enter or modify the information in the folder. For more details, refer to [Section 16.7.1, “Creating Custom Folders and Fields”](#).

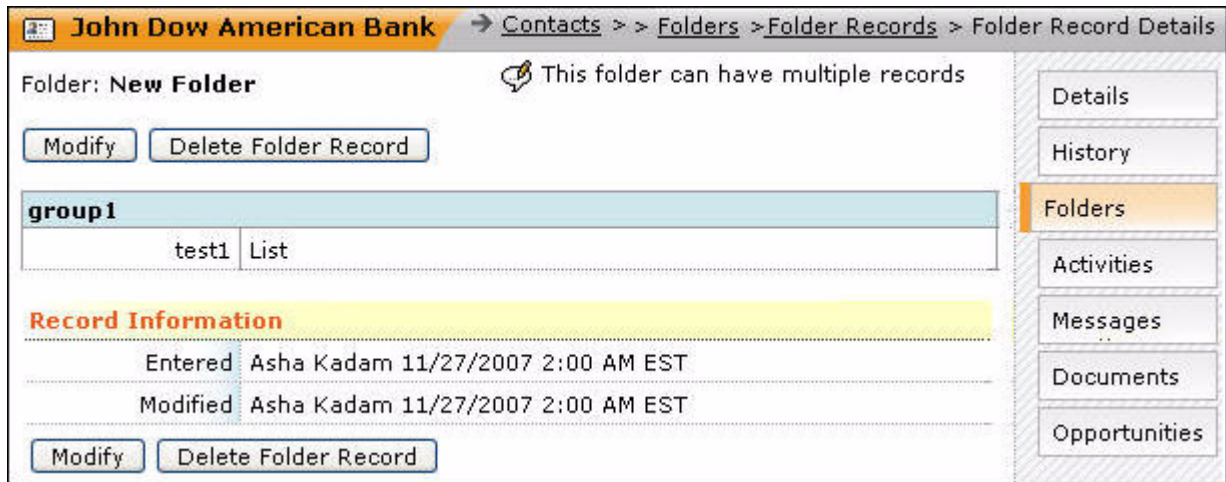


Figure 5.13 Contact Folder

## 5.6 Recording and Planning Activities

In sales, you constantly interact with prospects through mails, phone calls, meetings, and so on. Each of these interactions is known as an activity. ConcourseSuite enables you to record activities as they occur, and to plan your future course of action. The application records the following activities:

- ◆ Incoming Call
- ◆ Outgoing Call
- ◆ Inhouse Meeting
- ◆ Outside Appointment
- ◆ Email Servicing
- ◆ Fax Servicing

To initiate business, you may be required to act in advance or proactively interact with a prospective client or a current customer. In such instances, the following interactions can be recorded:

- ◆ Proactive Call
- ◆ Proactive Meeting
- ◆ Email Proactive
- ◆ Fax Proactive

Clicking the **Activities** sub-tab displays the **Activities** page that enables you to log or schedule an activity for the contact, as shown in [Figure 5.14](#). The **Activities** page lists the following activities:

- Pending Activities
- Completed/Canceled Activities

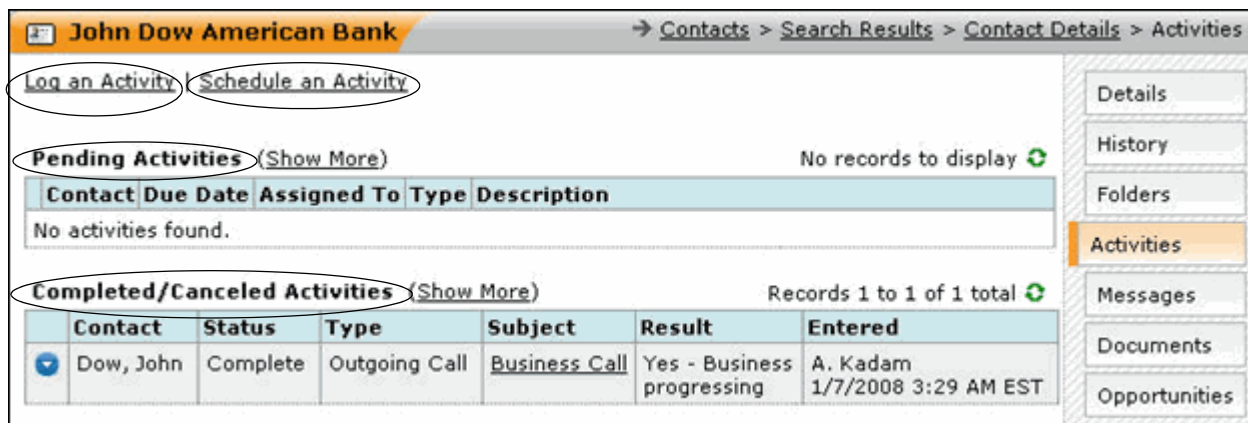


Figure 5.14 Logging and Scheduling Activities

A sample contact activities page is shown in Figure 5.15, displaying both pending and completed activities. When you click , a context menu is displayed.

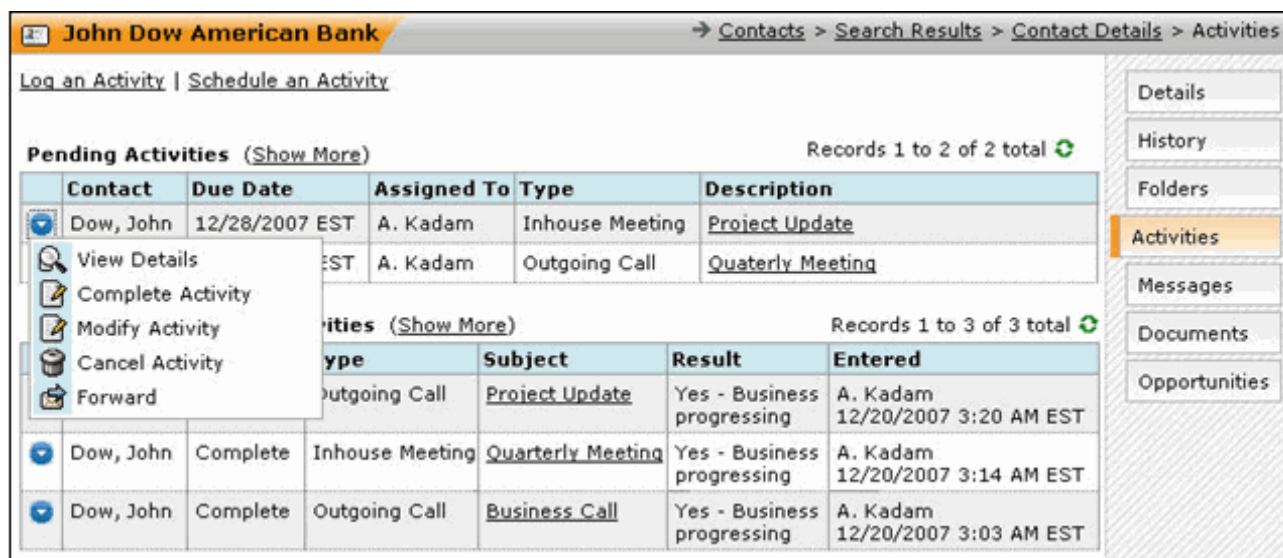


Figure 5.15 The Contact Activities Page

The following options are available on the context menu:

- **View Details**
- **Complete Activity**
- **Modify Activity**
- **Cancel Activity**
- **Forward**

Assume a contact named "John Dow" attends an incoming business call. The following sections guide you to record this activity and schedule an outgoing call for the same contact:

- **“Log an Activity”**
- **“Schedule an Activity”**



## 5.6.1 Log an Activity

To record John Dow's incoming business call:

1. Click the **Log An Activity** link.

The page to log an activity is displayed, as shown in [Figure 5.16](#).

The screenshot shows a web application interface for logging an activity. The breadcrumb trail is: **John Dow American Bank** > [Contacts](#) > [Search Results](#) > [Contact Details](#) > [Activities](#) > [Log an Activity](#). The form has a yellow header with the text "Log an Activity". It contains several input fields: "Type" (dropdown menu set to "-- None --"), "Length" (input field with "0" and "Minute(s)" dropdown), "Start Date" (calendar icon, date "12/20/2007", time "03:30 AM", and time zone "GMT-5 Eastern US"), "End Date" (calendar icon, date "12", time "00 AM", and time zone "GMT-5 Eastern US"), "Subject" (text input field), "Notes" (large text area), "Location" (text input field), "Participants" (dropdown menu set to "None Selected" with a "[Select]" button and an "Email Participants" checkbox), and "Result" (dropdown menu set to "Yes - Business progressing" and a "Schedule follow-up activity:" checkbox). There are "Save" and "Cancel" buttons at the top left and bottom left. On the right side, there is a vertical navigation menu with buttons for "Details", "History", "Folders", "Activities" (highlighted), "Messages", "Documents", and "Opportunities".

**Figure 5.16 Logging an Activity**

2. Select **Incoming Call** as the **Type** of activity.
3. Select the start and end date. You can click the calendar icon to select a date, as shown in [Figure 5.17](#). You can also specify the starting and ending time of the activity. The option of selecting time zone is also provided.

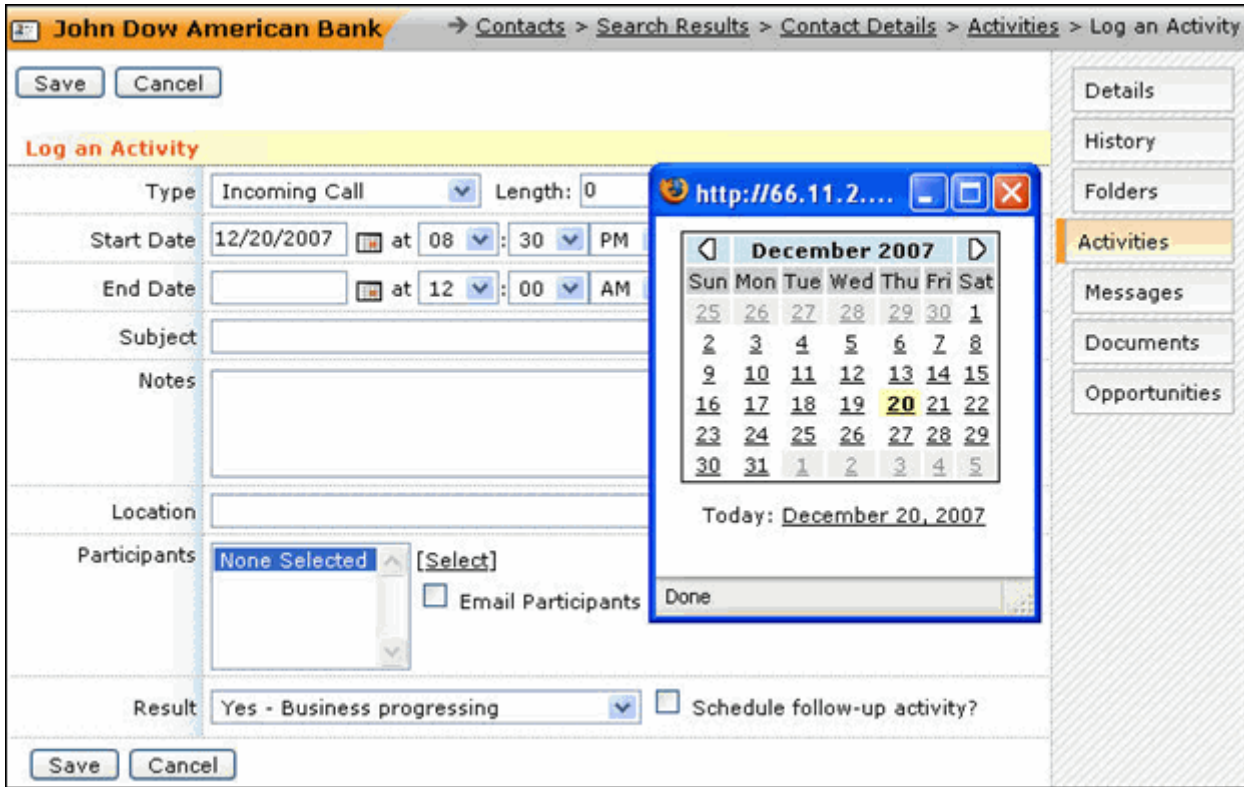


Figure 5.17 Specifying Start Date for the Activity

4. Enter **Business Call** as the **Subject**.
5. Enter a brief description of the call in **Notes**.
6. Specify the location of the activity, if applicable, in **Location**.
7. Select the participants of the call by clicking **Select** in front of **Participants**.

A pop-up window is displayed. By default, a list of contacts is displayed. You can also select participants from employees, your contacts, account contacts, your projects, and leads, as shown in [Figure 5.18](#).



Figure 5.18 Selecting Participants

8. Select the required participant's name and click **Done**.

9. Select **Email Participants** if you want to send a mail to the participants of the activity.
10. Select **Yes Business progressing** as the **Result**, as shown in [Figure 5.19](#).
11. Click **Save**.

Figure 5.19 Logging an Incoming Call

## 5.6.2 Schedule an Activity

To schedule John Dow’s planned business call:

1. Access **Schedule an Activity** by:
  - a. Select the **Schedule follow-up activity** option in the **Log an Activity** section, as shown in [Figure 5.19](#).
  - b. Clicking the **Schedule an Activity** link on the **Activities** page, as shown in [Figure 5.14](#).

The page to schedule an activity is displayed, as shown in [Figure 5.20](#).

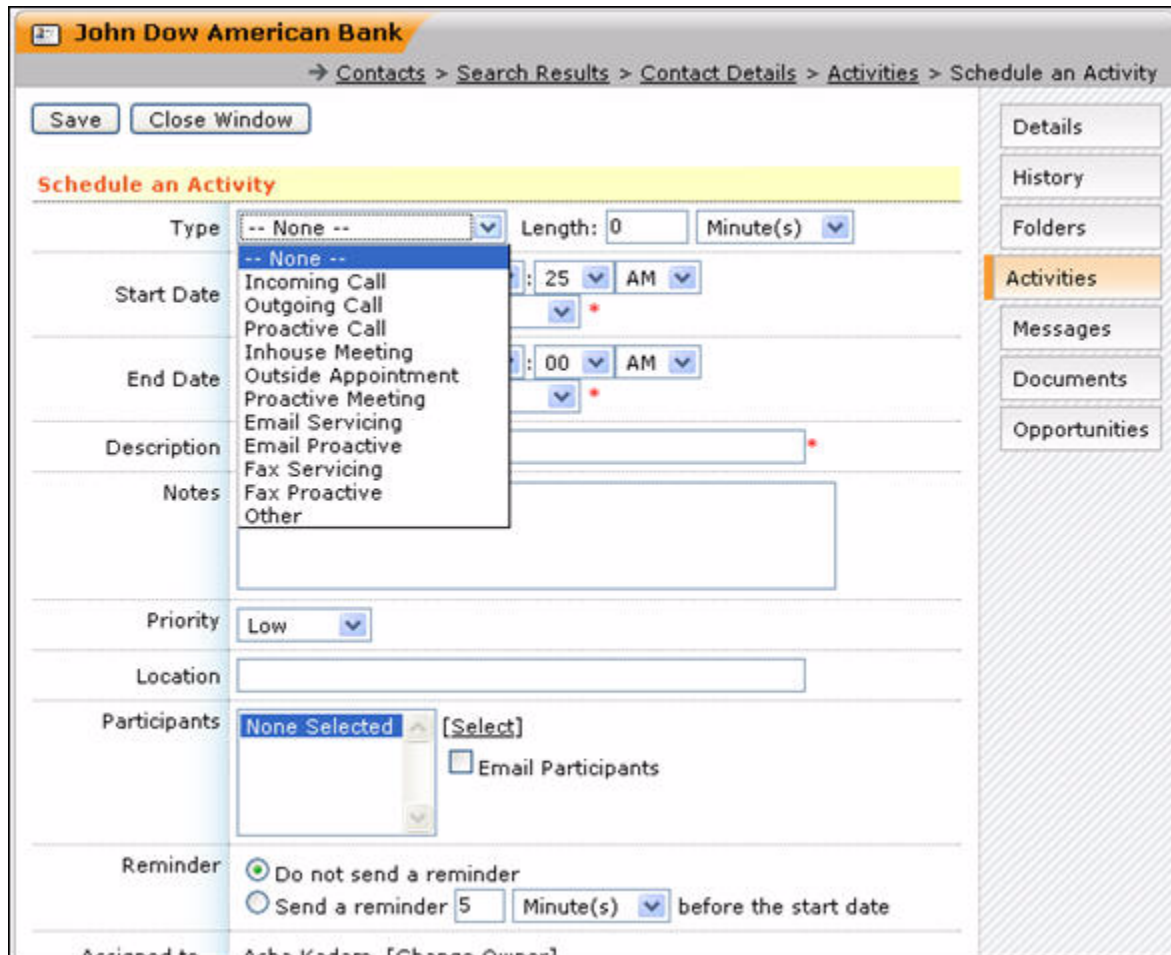


Figure 5.20 Scheduling an Activity

2. Select **Outgoing Call** as Type.
3. Select the start and end dates. You can click the calendar icon to select a date, as shown in [Figure 5.21](#). You can also specify the starting and ending time and the time zone of the activity.

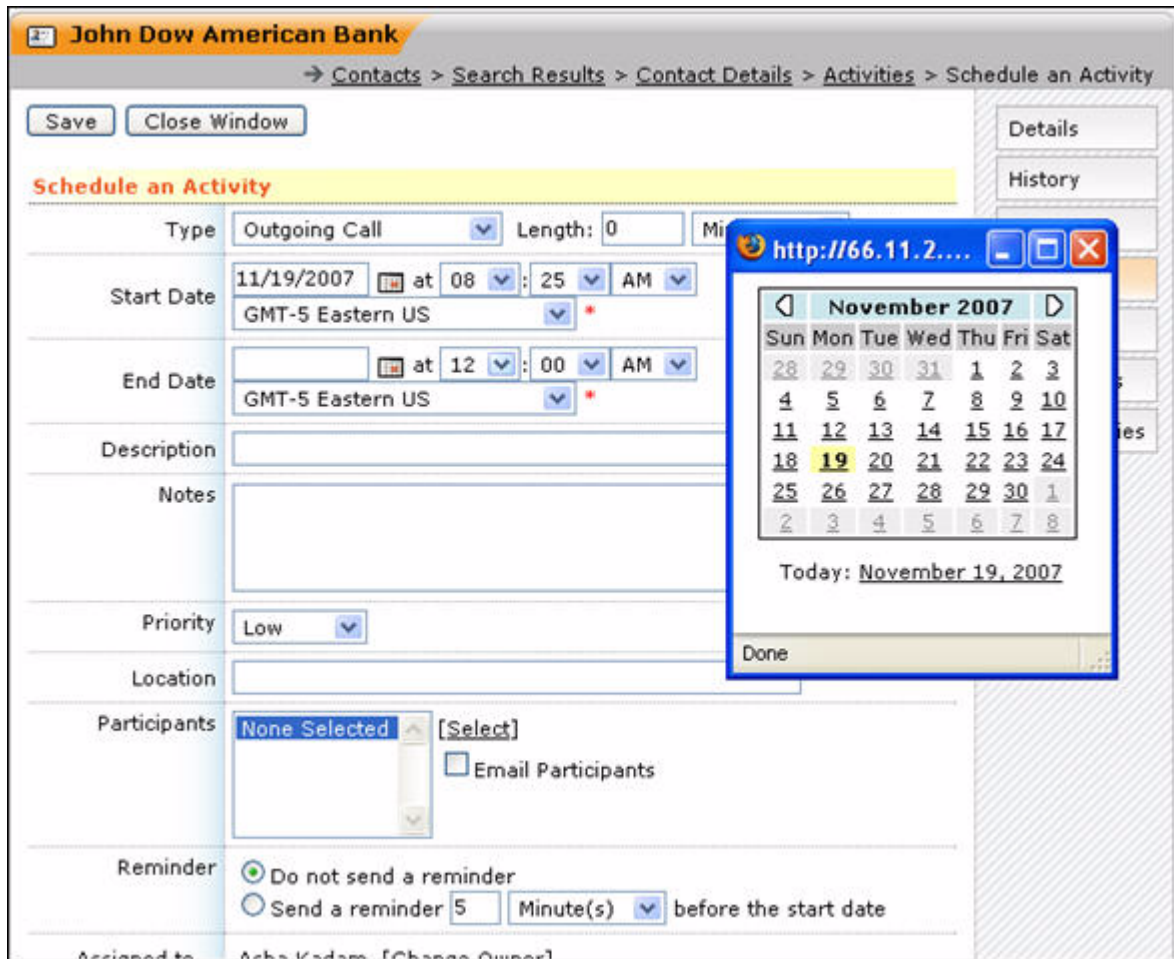


Figure 5.21 Specifying Start Date of the Scheduled Activity

4. Enter a brief description and notes on the agenda for the planned call in the respective fields.
5. Select **High**, **Low**, or **Medium** as the **Priority** depending on the importance of this activity.
6. Specify the location of the activity, if applicable, in **Location**.
7. Select the participants of the call by clicking **Select** in front of **Participants**.

A pop-up window is displayed. By default, list of contacts is displayed. You can also select participants from employees, your contacts, account contacts, your projects, and leads, as shown in [Figure 5.22](#).



Figure 5.22 Selecting Participants

8. Select the required participant's name and click **Done**.
9. Select **Email Participants** if you want to send a mail to the participants of the scheduled activity.
10. Select the option **Send a reminder**. Specify the time (in minutes, hours, days, weeks, or months) since when you want to receive the reminder.
11. Click **Save**.

The business call with John Dow is scheduled.

## 5.7 Sending Messages

The **Messages** page contains a chronological record of every communication sent to the contact, whether through a campaign in the **Communications** module, or an email sent from the **Home** module of ConcourseSuite.

You can access the **Messages** page by clicking the **Messages** sub-tab on the **Contact Details** page, as shown in [Figure 5.23](#).

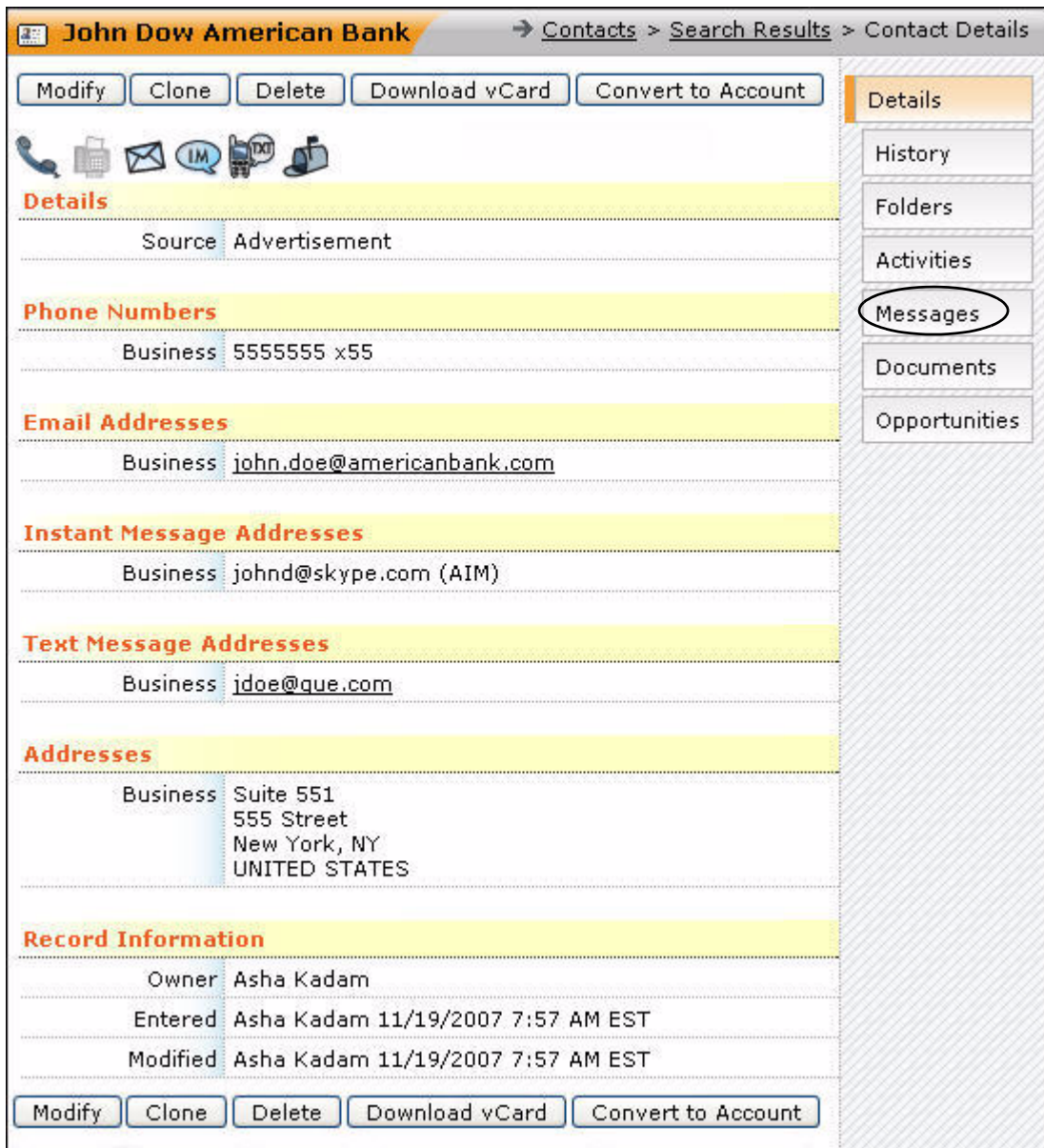


Figure 5.23 Accessing the Messages Page

You can review every message that has been sent to a contact. You can also send a message to a contact by clicking **New Message**. The **New Message** page is displayed, as shown in [Figure 5.24](#).

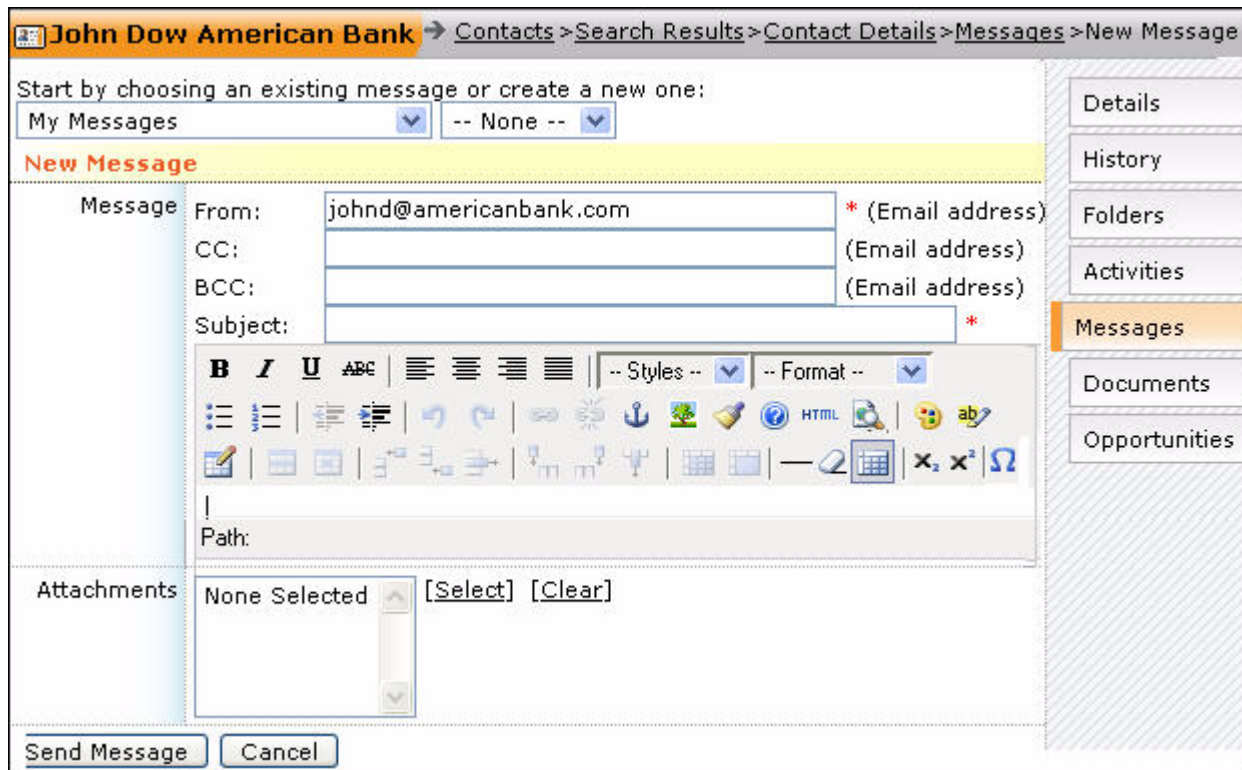


Figure 5.24 The New Message Page

Enter your email address, the subject of the email, and the message.

You can attach documents to the new message. Documents can be directly uploaded while writing the email or selected from any of the following modules:

- Accounts
- Contacts
- Projects
- Documents

To attach documents to your messages, follow the steps listed below:

1. Click the **Select** link.

The **Attach New File** page is displayed, as shown in [Figure 5.25](#).



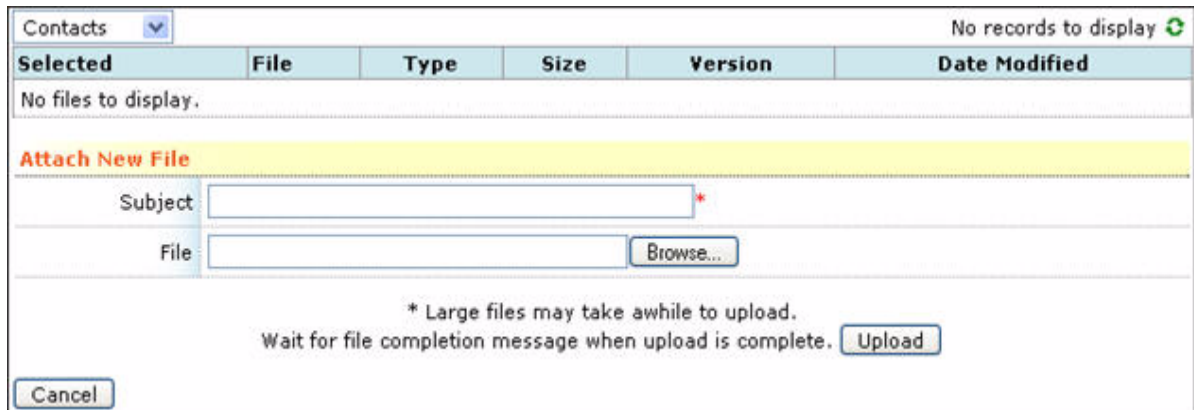


Figure 5.25 The Attach New File Page

- By default, the documents available in the **Contacts** module are displayed. You can select the module that contains the documents to be attached, as shown in [Figure 5.26](#).

Selecting the module displays the folders and documents stored in that module.

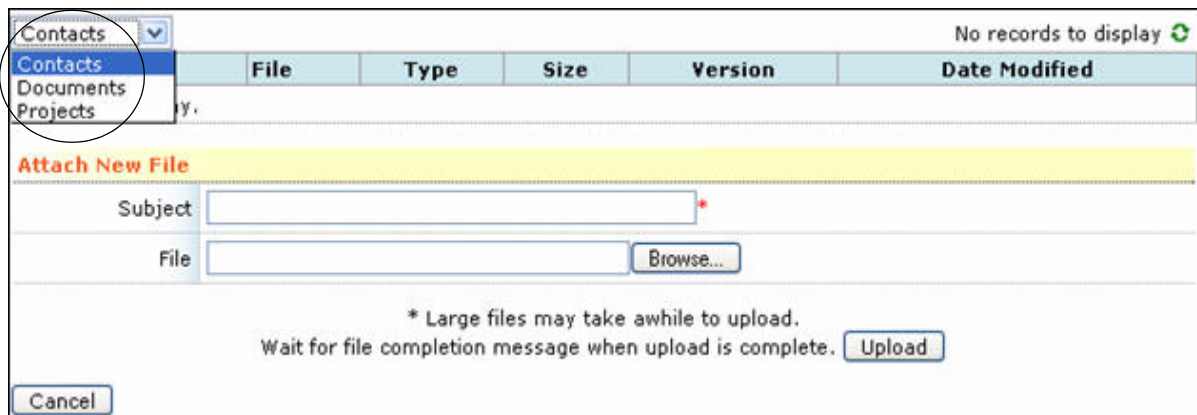


Figure 5.26 Selecting the Module

- You can also attach documents from your local hard disk. Click **Browse** to upload a new document, as shown in [Figure 5.27](#).

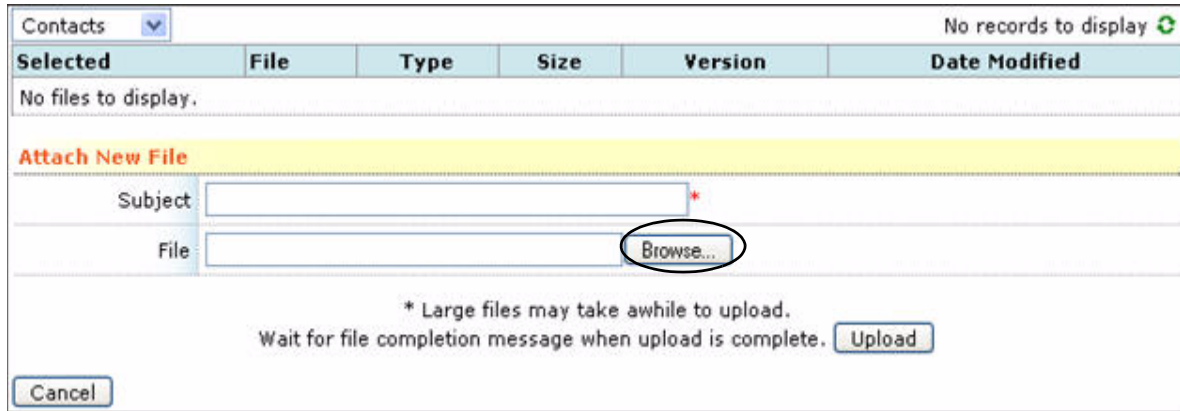


Figure 5.27 Locating a Document to Upload

The **Choose file** window is displayed, as shown in [Figure 5.28](#).

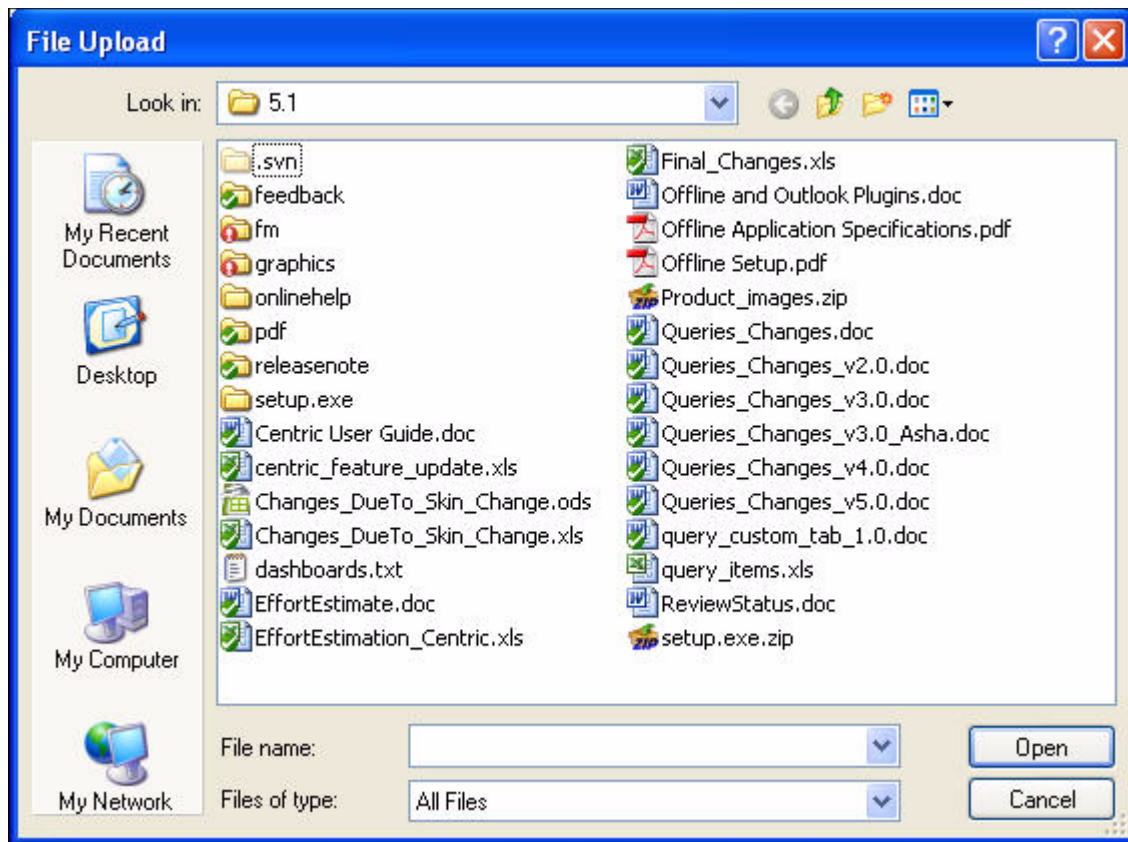


Figure 5.28 The Choose File Window

4. Select the file and click **Open**.

The name and location of the selected file is displayed, as shown in [Figure 5.29](#).

5. Enter a subject.
6. Click **Upload**, as shown in [Figure 5.29](#).

The uploaded file with the subject "New File" is displayed in the list of selected files, as shown in [Figure 5.30](#).

Contacts  No records to display

Selected	File	Type	Size	Version	Date Modified
No files to display.					

**Attach New File**

Subject  \*

File

\* Large files may take awhile to upload.  
Wait for file completion message when upload is complete.

**Figure 5.29 Uploading a Selected Document**

7. Select the required files to be attached, as shown in [Figure 5.30](#).

Contacts  Records 1 to 1 of 1 total

Selected	File	Type	Size	Version	Date Modified
<input checked="" type="checkbox"/>	New Document	.pdf	119 k	1.0	11/19/2007 10:44 PM EST Asha Kadam

**Attach New File**

Subject  \*

File

\* Large files may take awhile to upload.  
Wait for file completion message when upload is complete.

**Figure 5.30 Attaching the Documents**

8. Click **Attach**.

The attached documents are displayed in the **New Message** page, as shown in [Figure 5.31](#).

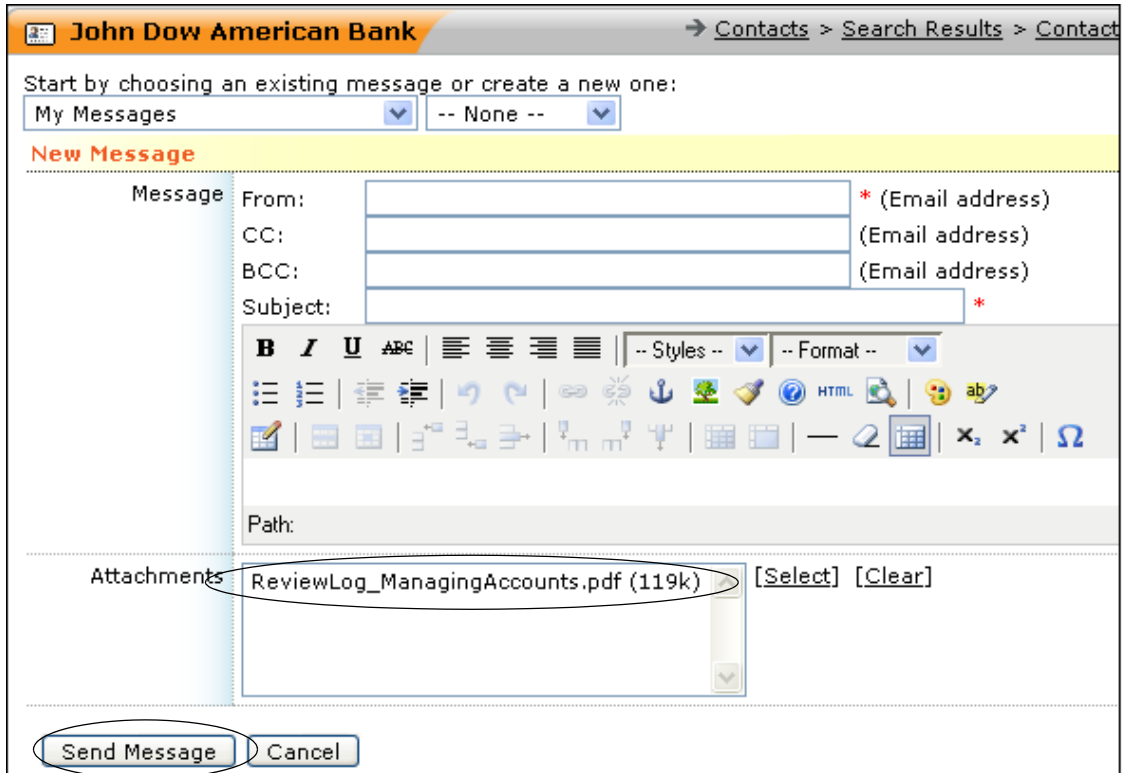


Figure 5.31 New Message Page with Attachments

9. Click Send Message.

## 5.8 Adding and Accessing Documents

You can access the **Documents** page by clicking the **Documents** sub-tab on the **Contact Details** page, as shown in [Figure 5.32](#).

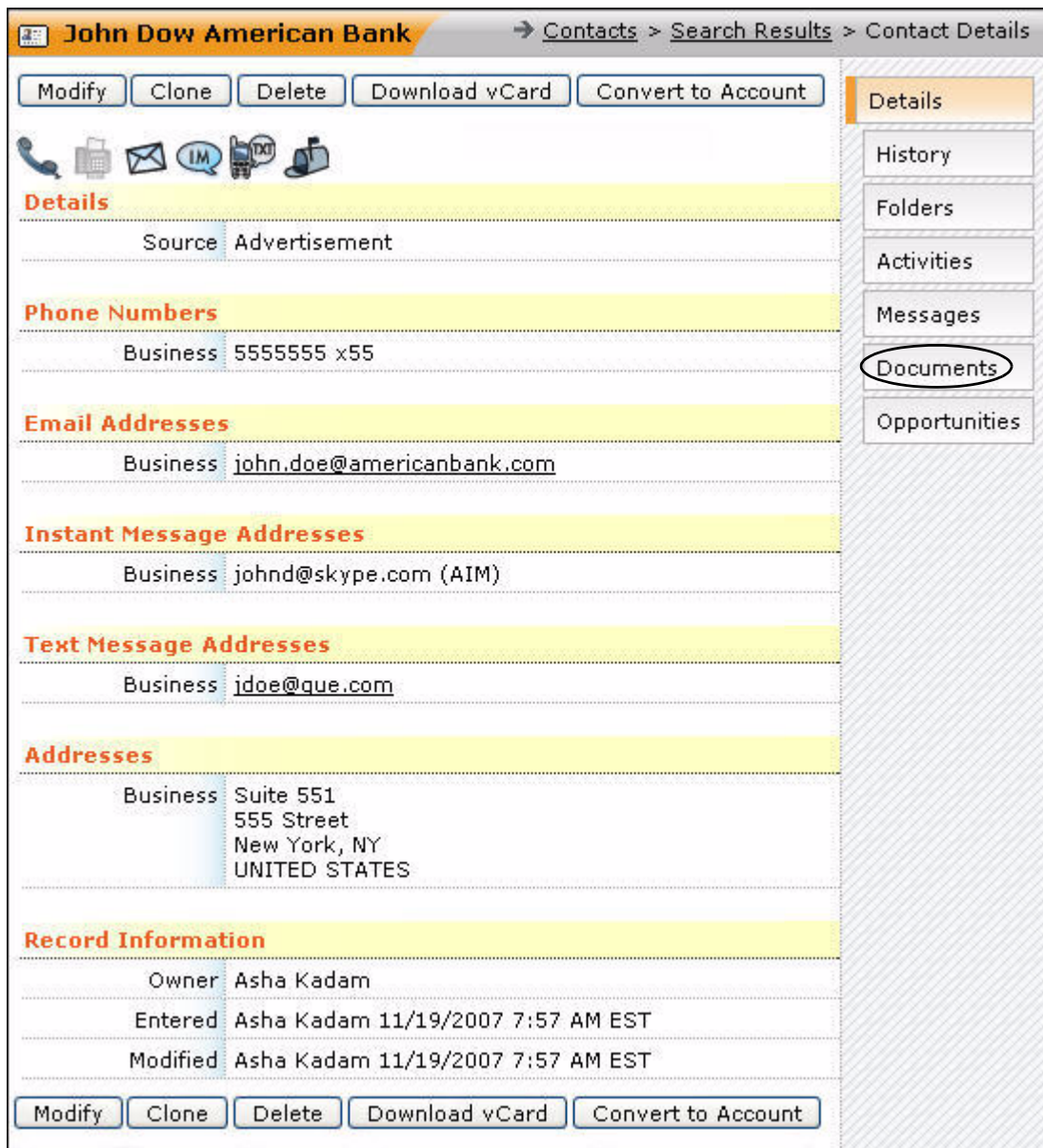


Figure 5.32 Accessing the Documents Page

The **Documents** page of the **Contacts** module displays a detailed list of folders and documents stored against a particular contact, as shown in [Figure 5.33](#). These files and folders are relevant to this contact.

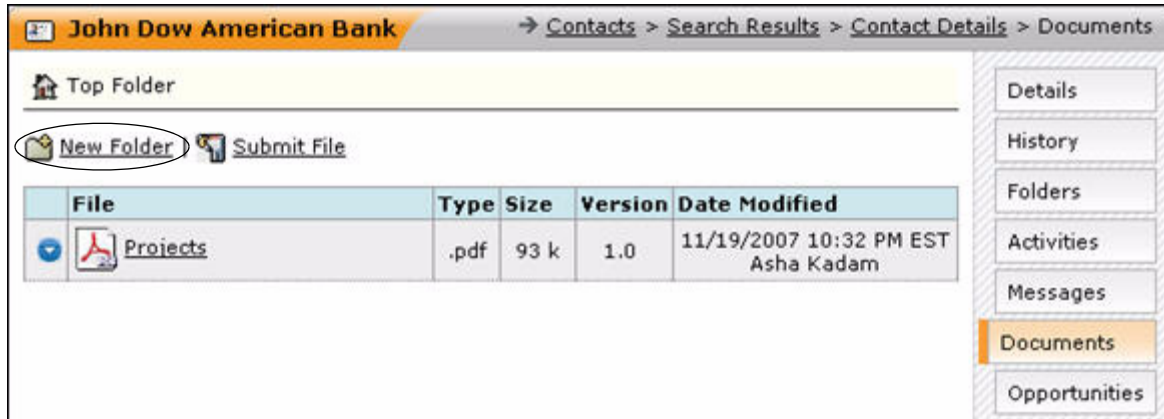


Figure 5.33 Viewing the Documents Page

You can organize your documents in two ways:

- a. Create a new folder and store documents in this folder. Attach the folder to the contact.
- b. Attach documents directly to the contact.

To create a new folder and store documents within this folder:

1. Click **New Folder**, as shown in [Figure 5.33](#).

The **New Folder** page is displayed, as shown in [Figure 5.34](#).



Figure 5.34 Viewing the New Folder Page

2. Enter the **Name** of the folder and click **Save**.

A new folder by the specified name is displayed on the **Documents** page, as shown in [Figure 5.35](#).

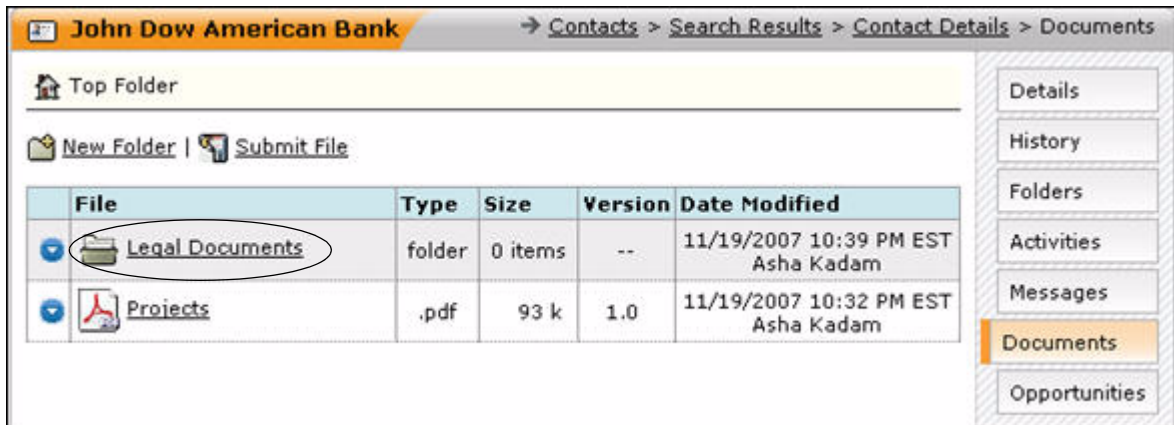


Figure 5.35 Viewing the Created Folder

3. Click the folder name, as shown in [Figure 5.35](#).

The **Documents** page of the new folder "Legal Documents" is displayed, as shown in [Figure 5.36](#).



Figure 5.36 Viewing the Documents Page of the Created Folder

4. Click **Submit File** to add new documents to this folder, as shown in [Figure 5.36](#).

The **Upload Document** page is displayed, as shown in [Figure 5.37](#).

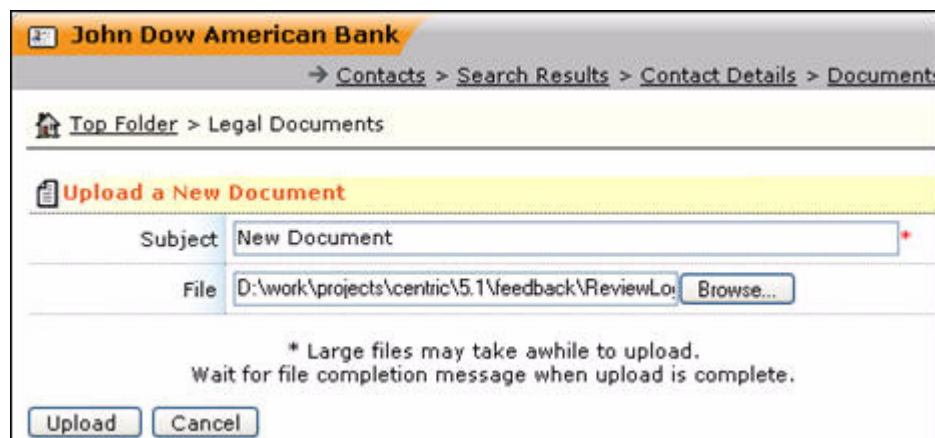


Figure 5.37 Viewing the Upload Document Page

5. Enter the **Subject**.

6. Click **Browse**. Select the document to upload and click **Open** on the **Choose file** window and click **Upload**, as shown in [Figure 5.37](#).

The **Documents** page with the added document is displayed, as shown in [Figure 5.38](#).

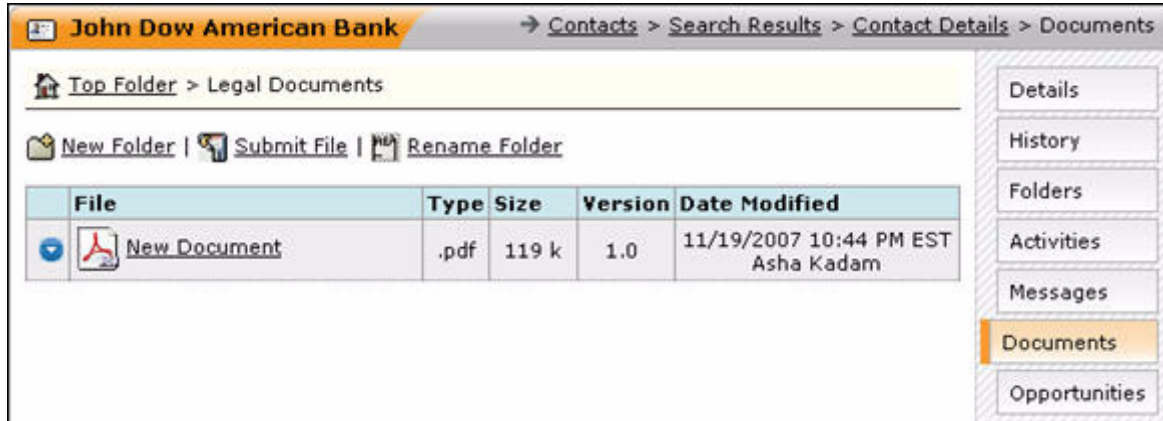


Figure 5.38 Viewing the Uploaded Document

To attach documents directly to the contact, follow the steps listed below:

1. Click **Submit File**, as shown in [Figure 5.39](#).

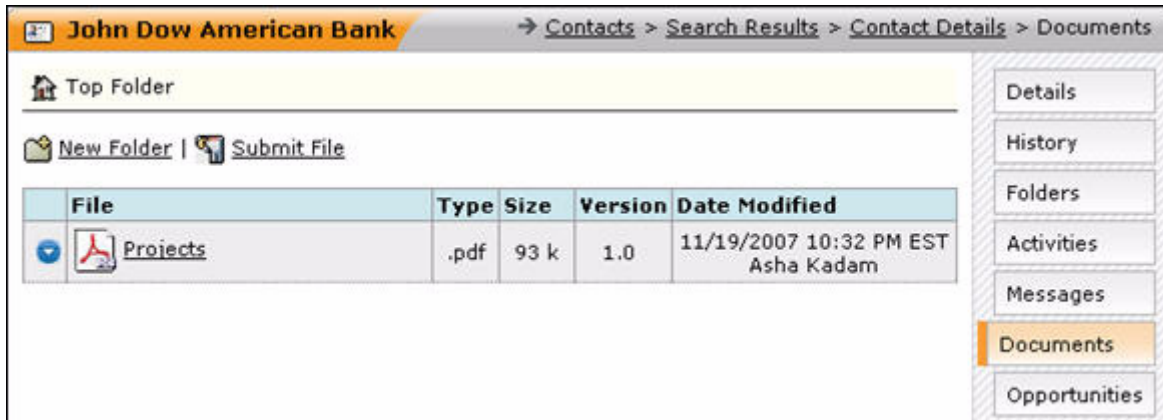


Figure 5.39 The Top Folder Page

The **Upload Document** page is displayed, as shown in [Figure 5.40](#).



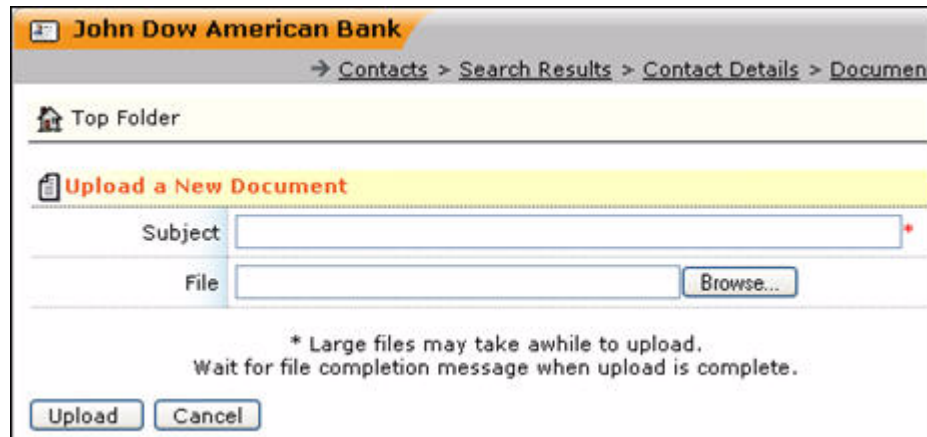


Figure 5.40 Viewing the Upload Document Page

2. Enter the **Subject**.
3. Click **Browse**. Select the document to upload, click **Open** on the **Choose file** window and click **Upload**, as shown in [Figure 5.40](#).

The **Documents** page with the added document is displayed, as shown in [Figure 5.41](#).

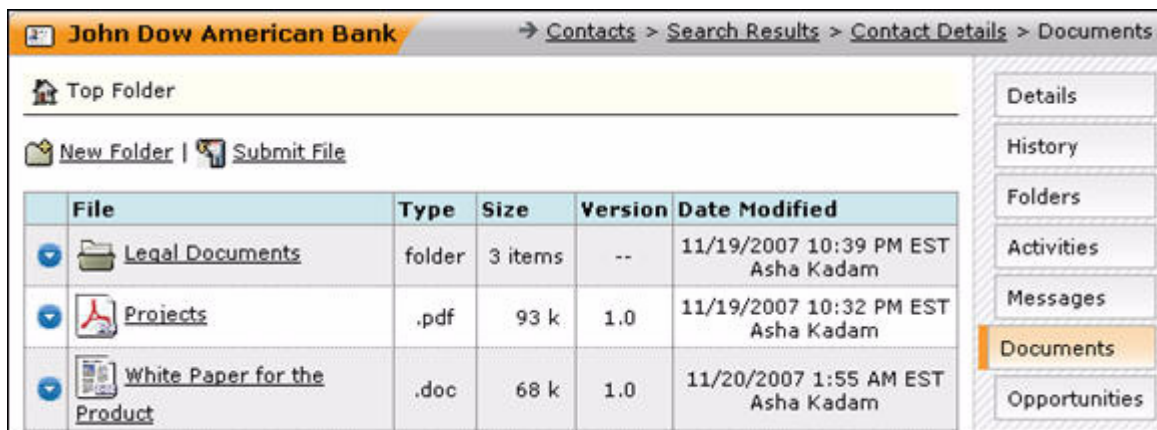


Figure 5.41 Viewing Documents Page with the Uploaded Document

## 5.9 Viewing Opportunities

You can access the **Opportunities** page by clicking the **Opportunities** sub-tab on the **Contact Details** page, as shown in [Figure 5.42](#).

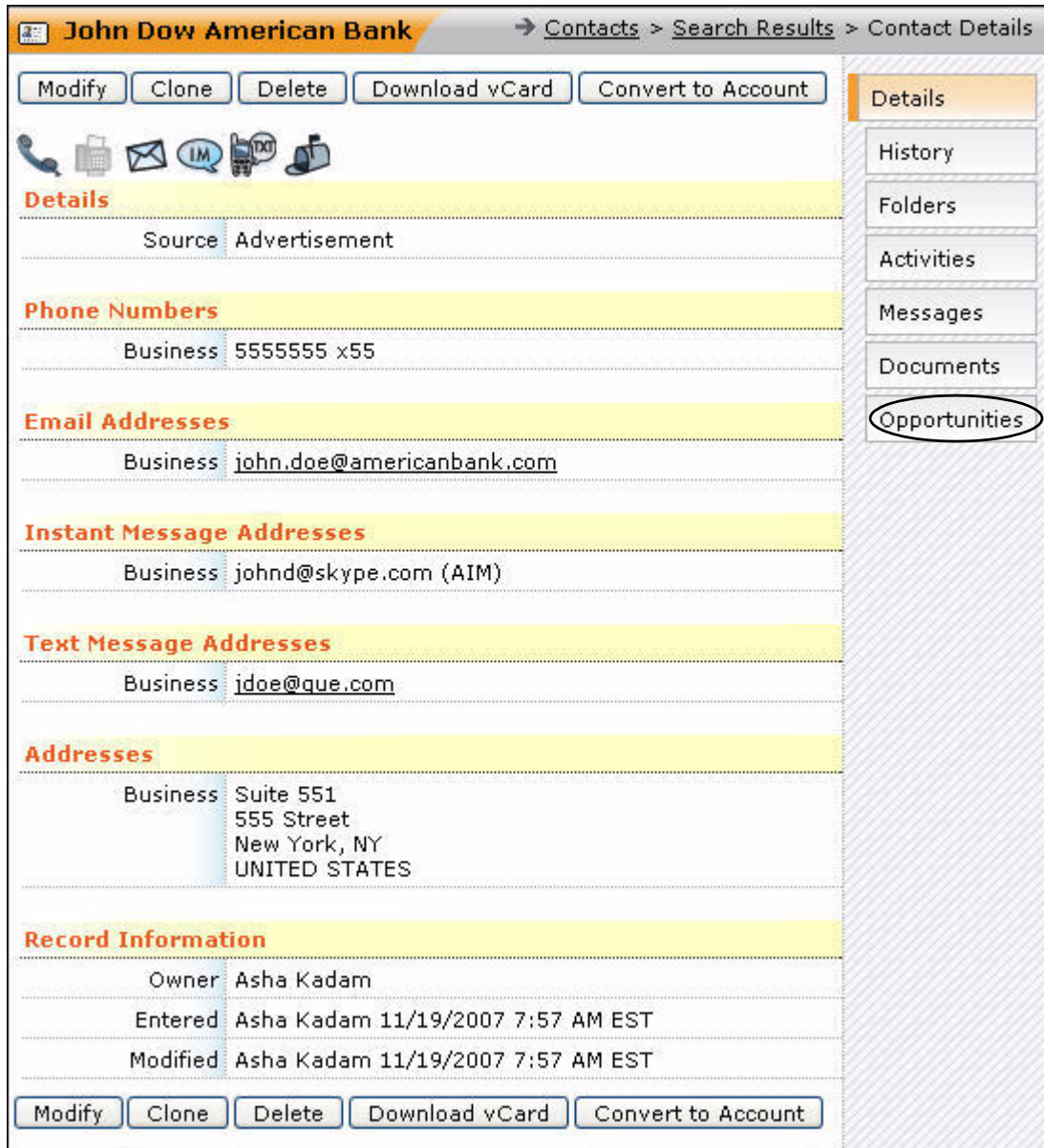


Figure 5.42 Accessing the Opportunities Page

The **Opportunities** sub-tab lists and describes opportunities related directly to the contact.

The different types of opportunities are:

- All Open Opportunities
- All Closed Opportunities
- My Open Opportunities

You can view details of an opportunity by clicking **Opportunity Name**. You can also rename or delete an opportunity by clicking the relevant options.

For more details, refer to [Section 6.4, "Adding an Opportunity"](#).

## 5.10 Importing Contacts

This feature, similar to the **Lead** module's **Import** feature, enables you to import a list of contacts from another application, such as a .CSV file. The procedure for importing contacts is similar to the procedure for importing leads. For more details, refer to [Section 4.7, "Importing Leads"](#).

---

---

**Note:** The **Contact Type** is also imported and specified in the .CSV files.

---

## 5.11 Exporting Contacts

This feature enables you to export contact details. The procedure to export contacts is similar to the procedure for exporting leads. For more details, refer to [Section 4.8, "Exporting Leads"](#).



## Understanding the Pipeline

This chapter provides information on the **Pipeline** module of ConcourseSuite. This module enables you to document, analyze, and manage revenue opportunities with your contacts and accounts.

This chapter consists of the following sections:

- ❑ [Section 6.1, “How Does This Module Help You?”](#)
- ❑ [Section 6.2, “Viewing the Dashboard”](#)
- ❑ [Section 6.3, “Understanding the Overview Link”](#)
- ❑ [Section 6.4, “Adding an Opportunity”](#)
- ❑ [Section 6.5, “Searching for an Opportunity”](#)
- ❑ [Section 6.6, “Exporting an Opportunity”](#)

### 6.1 How Does This Module Help You?

This module helps you track revenue opportunities that your organization is currently working on. It enables you to gauge revenue potential and manage opportunities with your contacts and accounts.

An opportunity is defined as the possibility of doing business with a person or company that you know. Complex opportunities may be made up of several components. For example, consider the sale of a product, such as machinery. You must provide training to the customer on how to use the product, and also provide support after the sale. Hence, the components in this above example are:

- Machinery sale opportunity
- Training Contract
- Support Contract

Each of these components may have its own revenue amount. Opportunities are recorded with the following attributes associated with them:

- A customer
- An estimated amount of revenue
- A probability of closure expressed as a percentage
- An estimate term for the completion of the opportunity

## 6.2 Viewing the Dashboard

The **Pipeline** menu bar is displayed in [Figure 6.1](#). This menu bar enables you to navigate through the **Pipeline** module.



Figure 6.1 The Pipeline Menu Bar

The **Dashboards** page is the default page in the **Pipeline** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, "Configuring Dashboards"](#).

## 6.3 Understanding the Overview Link

Click **Overview**. The **Overview** page displayed, as shown in [Figure 6.2](#), has a dashboard area on the left, and a listing of opportunities on the right, one per line, as shown in [Figure 6.2](#).

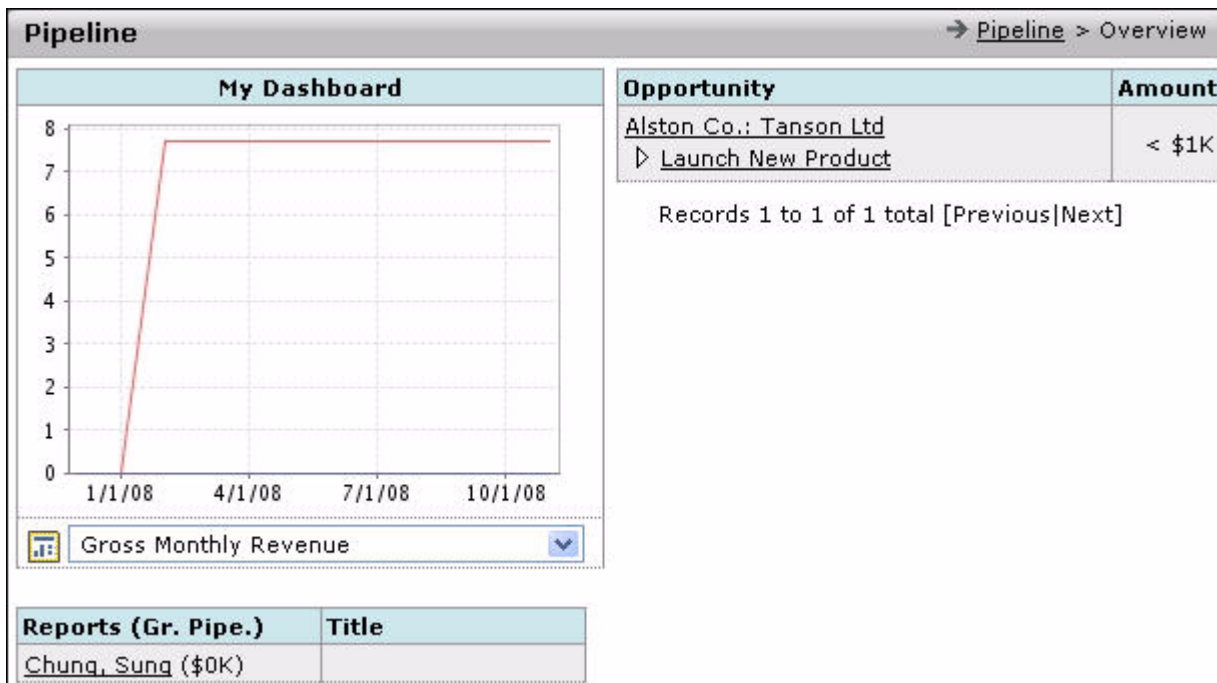


Figure 6.2 The Dashboard Home Page

The **My Dashboard** section displays a graph with:

- The value of the opportunities assigned to you and your subordinates.
- A list of your opportunities.

The components of the graph are explained below:

- The blue line on the graph represents the total value of the opportunities for you and your subordinates.
- The red line represents the value of the opportunities of your subordinates.
- The value of your own opportunities is the difference between the two previous values at any point on the graph.

You can select any of the following options from the drop-down list just below the graph to view the corresponding graph, as shown in [Figure 6.3](#) (part 1 - My Dashboard):

- **Gross Monthly Revenue**
- **Risk Adjusted Monthly Revenue**
- **Commission Gross Monthly Revenue**
- **Commission Risk Adjusted Monthly Revenue**



Figure 6.3 1. My Dashboard



2. Individual Dashboard

A table below the graph contains a list of user links for staff members who report to you. Click one of the links to view a graph for that particular employee. The selected employee's dashboard displays a graph with a red line, as shown in [Figure 6.3](#) (part 2 - Individual Dashboard).

The **Up One Level** link enables you to go up one level and the link **Back to My Dashboard** takes you back to your dashboard. These links enable you to work your way up and down the operational chain.

The opportunity listing is displayed to the right of your dashboard. You can also view the opportunities belonging to your subordinates by clicking the concerned user's link in the table below your dashboard graph.

Opportunities are displayed one per line, with a short description and the gross value, in thousands of dollars. You can select any opportunity to view its details, as shown in [Figure 6.4](#).

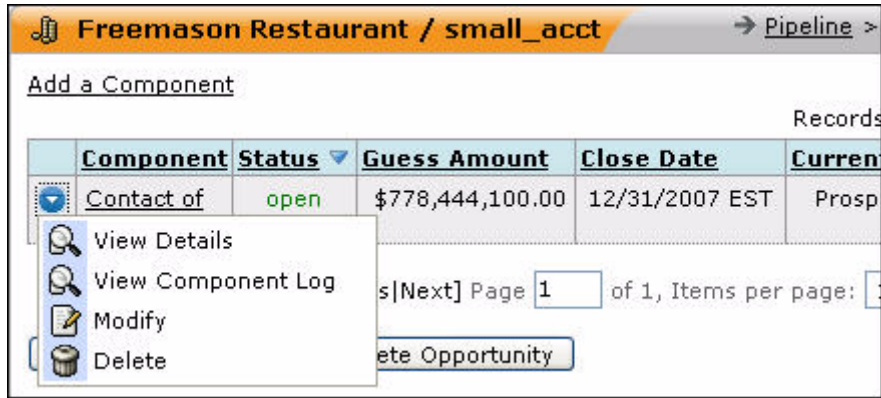



Figure 6.4 Opportunity Details

The opportunity, as shown in [Figure 6.4](#), has two components. When you click , a context menu is displayed. The following tasks are available on this menu:

- **View Details**
- **View Component Log**
- **Modify**
- **Delete**

The other available sub-tabs are:

- **History** - lists the opportunities considered in the recent past.
- **Activities** - lists the activities associated with the opportunity, and their status, whether they are pending or completed. You can also log and schedule an activity. For more details, refer to [Section 5.6.1, “Log an Activity”](#) and [Section 5.6.2, “Schedule an Activity”](#).

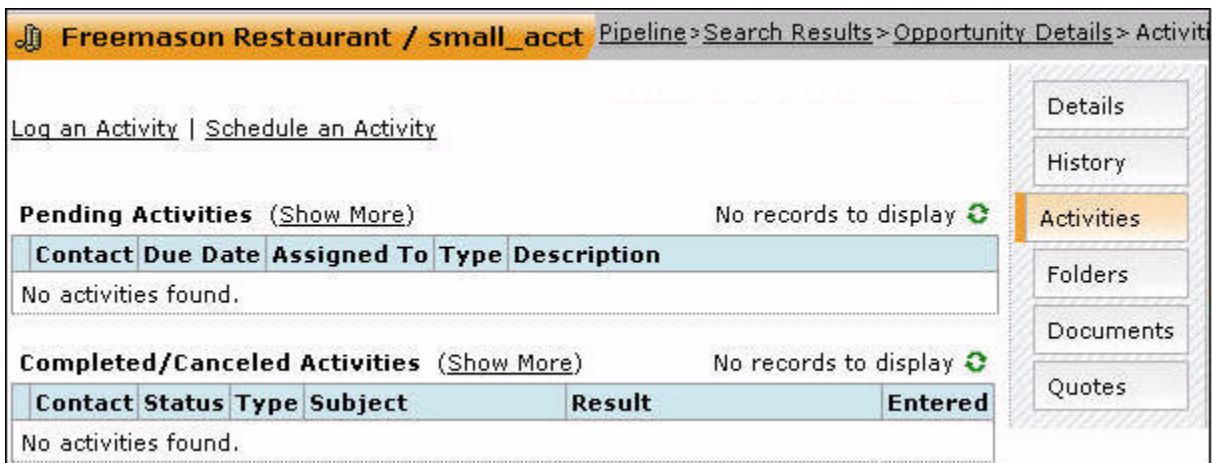


Figure 6.5 Logging and Scheduling Activities in Pipeline

- **Folders** - displays the folders for the opportunity. For more details, refer to [Section 16.7.1, “Creating Custom Folders and Fields”](#).
- **Documents** - This is a cross-link that takes you to the **Documents** module, displaying the documents associated with this opportunity. For more details, refer to [Chapter 11, “Managing Projects”](#).



- **Quotes** - Clicking this sub-tab takes you to the **Quotes** module displaying the available quotes for this opportunity. For more details, refer to [Section 9.2, "Searching Quotes"](#).

## 6.4 Adding an Opportunity

To add an opportunity:

1. Click **Add** on the menu bar.

A blank **Add Opportunity** page is displayed, as shown in [Figure 6.6](#).

**Pipeline** → Pipeline > Add Opportunity

Save Cancel

**Opportunity Details**

Opportunity Description  \*

Access Type  ▼

Manager Asha Kadam \*

**Add a Component**

Component Description  \*

Assign To Asha Kadam \*

ComponentType(s)  ▲  ▼

Associate With  Account: None Selected \*   Contact: None Selected

Additional Notes

Source  ▼

High Estimate USD

Low Estimate USD

Best Guess Estimate USD  \*

Prob. of Close  % \*

Est. Close Date   ▼ \*

Est. Term   ▼ \*

Current Stage  ▼  Close this component

Est. Commission  %

**Figure 6.6 The Add Opportunity Page**

2. Enter the relevant details in the form. Fields with a red asterisk are mandatory.

The **Add Opportunity** page contains the following fields:

- **Opportunity Description** - A brief description of the opportunity.
- **Access Type** - This field enables you to specify if the opportunity can be viewed by all users, or a particular group of users. The available options in the drop-down list are **Public** and **Controlled Hierarchy**.

- **Manager** - This option enables you to select the concerned manager for this opportunity.
  - **Component Description** - A brief description of the component.
  - **Assign To** - This field enables you to assign the responsibility of this opportunity to a subordinate.
  - **Component** - Clicking **Select** displays a pop-up window, where you can select a component type from the following options:
    - ◆ Annuity
    - ◆ Consultation
    - ◆ Development
    - ◆ Maintenance
    - ◆ Product Sales
    - ◆ Services
  - **Associate With** - This field enables you to associate the opportunity with an account or a contact.
  - **Additional Notes, Source, and Estimated Amounts - High, Low, and Best Guess.**
  - **Probability of Close**

Some companies have established a process for determining the probability value. For example, after they have delivered a presentation, they automatically assign a probability of 50%. Other companies are less formal, and the probabilities are assigned subjectively by the sales person, based solely on instinct. In either case, the probability should change from time to time as you work on the opportunity. This field is important, because it affects the dashboard graph in the **Risk Adjusted** mode.
  - **An Estimated Term and an Estimated Close Date.**
  - **Current Stage** - This field is a drop-down list that describes the stage of sale of an opportunity.
  - **Commission** - This field describes an estimated percentage of final sale that is assigned as commission.
 

This value can be taken into account on the dashboard by selecting one of the commission-adjusted revenue items in the drop-down list.
  - **Alert** - This field enables you to set alerts to call the customer.
 

You can enter an alert description and an alert date in the fields provided. The alert will be displayed both in your ConcourseSuite home page and your internet email.
3. Click **Save** to save the opportunity.
- The **Opportunity Details** page is displayed, as shown in [Figure 6.7](#). This page provides options to rename or delete the opportunity.

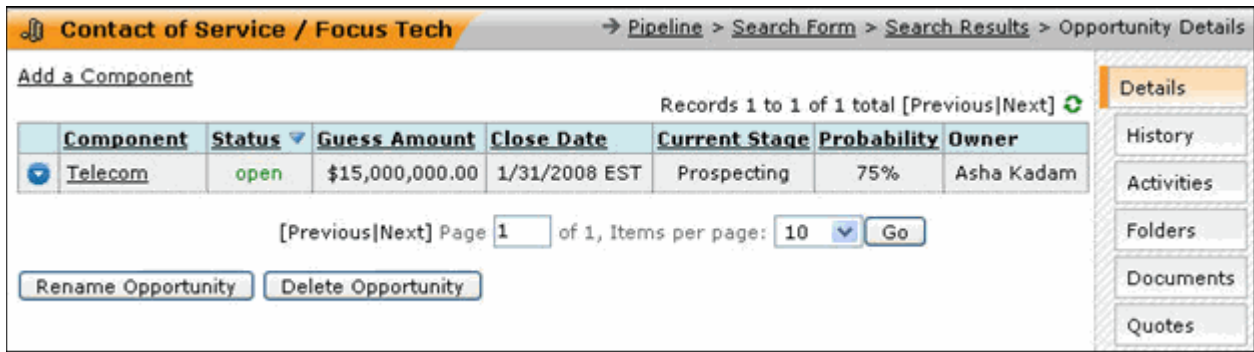


Figure 6.7 Viewing the Created Opportunity

## 6.5 Searching for an Opportunity

The **Search** link located on the menu bar enables you to find opportunities that match certain specific criteria. Clicking **Search** displays the **Search Opportunities** page, as shown in [Figure 6.8](#), in which you set the search criteria.

Figure 6.8 The Opportunity Search Page

Clicking **Search** displays the **Search Results** page, as shown in [Figure 6.9](#), listing the opportunities that match the search criteria.

Pipeline → Pipeline > Search Form > Search Results

Add an Opportunity 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 2 of 2 total [Previous|Next] ↻

Component ▲	Guess Amount	Probability	Close Date	Term	Owner	Organization	Contact
Shown interest in IT	\$125,555.00	50%	1/31/2008 EST	15 weeks	Asha Kadam		Dow, John (American Bank)
Telecom	\$15,000,000.00	75%	1/31/2008 EST	15 weeks	Asha Kadam	Focus Tech	

[Previous|Next] Page 1 of 1, Items per page: 10 [Go]

Figure 6.9 The Search Results Page

## 6.6 Exporting an Opportunity

The export feature enables you to export opportunities. Click **Export** on the menu bar, to view a list of files that have been exported in the past, as shown in [Figure 6.10](#).

Pipeline → Pipeline > Export Data

Generate new export 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

My Exported Data ▼ Records 1 to 1 of 1 total [Previous|Next] ↻

Subject	Size	Create Date	Created By	D/L
Opportunity Review	1k	11/19/2007 6:34 AM	Asha Kadam	0

[Previous|Next] Page 1 of 1, Items per page: 10 [Go]

Figure 6.10 Exported Data List

The list also displays the following details:

- Size of the exported data
- Date of creation of data
- Person who created the data

To export new data:

1. Click the **Generate new export** link, as shown in [Figure 6.10](#).

The **New Export** page is displayed, as shown in [Figure 6.11](#).

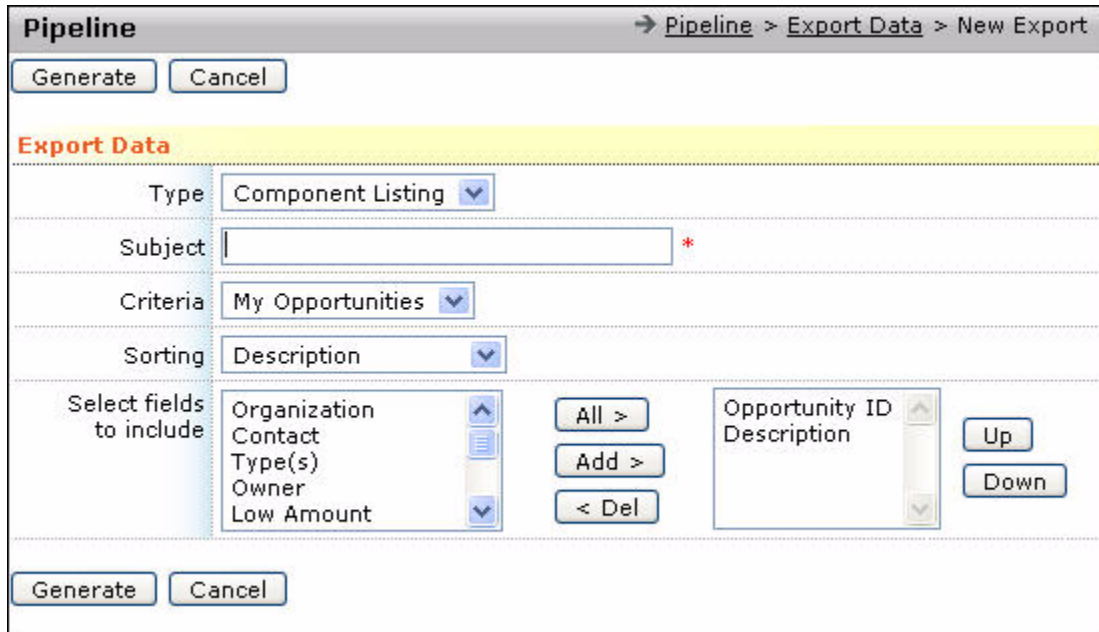


Figure 6.11 The Export Page

2. Select type and criteria and enter a subject.
3. Select the fields to be included and specify the field for sorting.
4. Click **Generate**.

The exported files are listed on the **Export Data** page, as shown in [Figure 6.12](#). The data can be viewed or downloaded as a .CSV file.

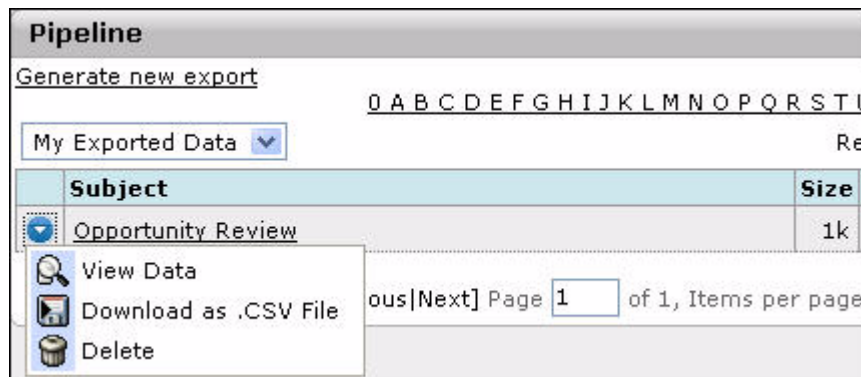


Figure 6.12 Viewing the New Export File

## Managing Accounts

This chapter provides information about the **Accounts** module of ConcourseSuite. This module enables you to view and store information about customers.

This chapter consists of the following sections:

- ❑ [Section 7.1, “How Does This Module Help You?”](#)
- ❑ [Section 7.2, “Viewing the Dashboards”](#)
- ❑ [Section 7.3, “Searching for an Account”](#)
- ❑ [Section 7.4, “Viewing Account Details”](#)
- ❑ [Section 7.5, “Importing Accounts”](#)
- ❑ [Section 7.6, “Exporting Accounts”](#)
- ❑ [Section 7.7, “Viewing History”](#)
- ❑ [Section 7.8, “Managing Folders”](#)
- ❑ [Section 7.9, “Viewing Contacts”](#)
- ❑ [Section 7.10, “Managing Action Plans”](#)
- ❑ [Section 7.11, “Adding Activities”](#)
- ❑ [Section 7.12, “Adding Opportunities”](#)
- ❑ [Section 7.13, “Adding Quotes”](#)
- ❑ [Section 7.14, “Viewing Projects”](#)
- ❑ [Section 7.15, “Viewing Service Contracts”](#)
- ❑ [Section 7.16, “Assets”](#)
- ❑ [Section 7.17, “Managing Tickets”](#)
- ❑ [Section 7.18, “Relationships”](#)
- ❑ [Section 7.19, “Document Stores”](#)

### 7.1 How Does This Module Help You?

In ConcourseSuite, customers are referred to as accounts. The **Accounts** module enables you to manage information about your accounts.

This module provides answers to the following queries:

- What products or services may a given customer purchase from you?
- What products or services has a given customer purchased from you?
- How and when has the customer been contacted, by phone or more formally?
- What is our commitment to the customer, in the form of contracts and/or Service Level Agreements?

This module also provides a publicly-accessible interface which the customer can use to view information, enter trouble tickets, or request for information.

This module provides information, context, and process, so that you can efficiently track customer transactions, create new sales opportunities, and serve customers.

You can access the **Accounts** module by selecting the **Accounts** tab, as shown in [Figure 7.1](#).



**Figure 7.1 The Accounts Menu Bar**

## 7.2 Viewing the Dashboards

The **Dashboards** page is the default page in the **Accounts** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 7.3 Searching for an Account

When you click the **Search** link on the menu bar of the **Accounts** tab, the **Search Accounts** page is displayed, as shown in [Figure 7.2](#). You can search for accounts by specifying the search criteria. The more information you enter in the **Search Accounts** page, the more refined your search becomes.



**Accounts** → [Accounts](#) > Search Accounts

Account Information Filters		Contact Information Filters	
Account Name	<input type="text"/>	First Name	<input type="text"/> [Add Choice]
Account Number	<input type="text"/>	Last Name	<input type="text"/> [Add Choice]
Account Type	<input type="text" value="None Selected"/> [Select] <input checked="" type="radio"/> Match all specified <input type="radio"/> Match any specified	Phone	<input type="text"/> [Add Choice]
Account Segment	<input type="text"/>	Country	-- None --
Account Source	All Accounts	City	<input type="text"/> [Add Choice]
Account Status	Any	State/Province	<input type="text"/> [Add Choice]
Stage	Any		
Country	-- None --		
Source	-- None --		
Postal Code	<input type="text"/> [Add Choice]		
City	<input type="text"/> [Add Choice]		
State/Province	<input type="text"/> [Add Choice]		
Asset Serial #	<input type="text"/> [Add Choice]		

Include contacts in search results

**Figure 7.2 The Search Accounts Page**

You can search for accounts by entering one or more of the following details:

- **Account Information Filters**
  - **Account Name**
  - **Account Number**
  - **Account Type** - There are multiple options provided in **Account Type**. Clicking **Select** displays a window, in which all the **Account Type** options are listed. Select the required option and click **Done**.
  - **Account Segment**
  - **Account Source**
  - **Account Status**
  - **Stage**
  - **Country**
  - **Source**
  - **Postal Code** - Click **Add Choice** to enter multiple options for postal code. A pop-up window is displayed. Add one of the postal code options in **Add Search**

**Option** and click **Add**. The postal code you entered is displayed in **Item List**. Similarly, enter more options for postal code.

You can remove a postal code from **Item List** by selecting it and clicking **Remove**. To rename an option in **Item List**, select the item, enter the correct option in **Add Search Option**, and click **Update**.

Add the required options of postal code and click **OK**. This enables you to search all accounts which have any of the specified postal codes.

- **City** - Click **Add Choice** to enter multiple city options for search. This enables you to search all accounts with any of the specified cities. For more details, refer to the **Postal Code** details in the same section.
- **State/Province** - Click **Add Choice** to enter multiple state or province options for search. This enables you to search all accounts with any of the specified state/province. For more details, refer to the **Postal Code** details in the same section.
- **Asset Serial Number** - Click **Add Choice** to enter multiple asset serial number options for search. This enables you to search all accounts with any of the specified asset serial numbers. For more details, refer to the **Postal Code** details in the same section.
- **Contact Information Filters**
  - **First Name** - Click **Add Choice** to enter multiple first name options for search. This enables you to search all accounts with any of the specified first names. For more details, refer to the **Postal Code** details in the same section.
  - **Last Name** - Click **Add Choice** to enter multiple last name options for search. This enables you to search all accounts with any of the specified last names. For more details, refer to the **Postal Code** details in the same section.
  - **Phone** - Click **Add Choice** to enter multiple phone number options for search. This enables you to search all accounts with any of the specified phone numbers. For more details, refer to the **Postal Code** details in the same section.
  - **Country** - Click **Add Choice** to enter multiple country options for search. This enables you to search all accounts with any of the specified countries. For more details, refer to the **Postal Code** details in the same section.
  - **City** - Click **Add Choice** to enter multiple city options for search. This enables you to search all accounts with any of the specified cities. For more details, refer to the **Postal Code** details in the same section.
  - **State/Province** - Click **Add Choice** to enter multiple state/province options for search. This enables you to search all accounts with any of the specified state/province. For more details, refer to the **Postal Code** details in the same section.

You can search for the contacts associated with an account directly by selecting the **Include contacts in search results** option.

You can specify the number of records that you want to be displayed per page. For example, the number of records displayed per page is set to 10 in [Figure 7.3](#).

Accounts <span style="float: right;">→ <a href="#">Accounts</a> &gt; Search Results</span>					
Add an Account					
<a href="#">Q</a> <a href="#">A</a> <a href="#">B</a> <a href="#">C</a> <a href="#">D</a> <a href="#">E</a> <a href="#">F</a> <a href="#">G</a> <a href="#">H</a> <a href="#">I</a> <a href="#">J</a> <a href="#">K</a> <a href="#">L</a> <a href="#">M</a> <a href="#">N</a> <a href="#">O</a> <a href="#">P</a> <a href="#">Q</a> <a href="#">R</a> <a href="#">S</a> <a href="#">T</a> <a href="#">U</a> <a href="#">V</a> <a href="#">W</a> <a href="#">X</a> <a href="#">Y</a> <a href="#">Z</a>					
Records 1 to 3 of 3 total [Previous Next]					
	Name	Title	Account Name	Phone/Fax	Email
<input type="checkbox"/>	<a href="#">Doe, Mike</a>		<a href="#">Doe, Mike</a>		
<input type="checkbox"/>	<a href="#">Fenton, Beth</a>		<a href="#">Focus Tech</a>		
<input type="checkbox"/>	<a href="#">Smith, Joe</a>		<a href="#">Focus Tech</a>		
[Previous Next] Page <input type="text" value="1"/> of 1, Items per page: <input type="text" value="10"/> <input type="button" value="Go"/>					

**Figure 7.3 The Search Results Page**

To view all accounts in the system, leave all the fields blank and click **Search**.

---

**Caution:** In applications with a large account database, using blank fields to search for accounts may be time consuming.

---

## 7.4 Viewing Account Details

Clicking an account name in the **Search Results** page displays the **Account Details** page, as shown in [Figure 7.4](#).

The screenshot shows the 'Account Details' page for 'Focus Tech'. The breadcrumb trail is 'Accounts > Search Results > Account Details'. At the top, there are 'Modify' and 'Delete Account' buttons. The main content area is divided into several sections:

- Primary Information:** Account Owner: Asha Kadam; Source: Advertisement; Stage: New; Industry: Telecommunications; Potential: \$200,000,000.00; Account Size: 101-1000.
- Phone Numbers:** Main: (512) 906-9881 x102 (Primary).
- Addresses:** Primary: 512 John Halton Street, CA, UNITED STATES.
- Email Addresses:** Primary: info@focus.com (Primary).
- Additional Details:** Notes.
- Record Information:** Entered: Asha Kadam 11/19/2007 4:38 AM EST; Modified: Tech Writer 11/20/2007 1:37 AM EST.

At the bottom, there are 'Modify' and 'Delete Account' buttons. On the right side, there is a sidebar with a 'Details' link circled, and other links: History, Folders, Contacts, Action Plans, Activities, Opportunities, Quotes, Projects, Service Contracts, Assets, Tickets, Relationships, Documents, and Document Stores.

Figure 7.4 The Account Details Page

You can view the following information:

- **Primary Information** - account ownership and other basic information, including any alerts that might be set for the customer.
- **Phone Numbers** - contact numbers for this account.
- **Addresses** - the mailing addresses for this account.
- **Email Addresses** - the email addresses associated with this account.
- **Additional Details** - contains any free form notes entered for this account.

- **Record Information** - contains the following information:
  - When was the account created?
  - By whom was the account created?
  - When was the account last modified and by whom?

---

---

**Note:** An account can have any number of mailing addresses, email addresses, and phone numbers as necessary. Also, all the phone numbers and addresses apply to the account in general, not necessarily to a particular contact for an account.

---

Since all accounts are public in ConcourseSuite, all users having access to an account can view and modify it. Hence, the account owner may not be the person who last modified the account.

## 7.4.1 Modifying an Account

Click **Modify** on the **Account Details** page to modify the account details. The **Modify Account** page is displayed, as shown in [Figure 7.5](#).

**Focus Tech** → Accounts > Search Results > Account Details > Modify Account

Update Cancel

**Modify Primary Information**

Account Type(s) None Selected [Select]

Classification  Organization  Individual

Account Name Focus Tech \*

Primary Contact None Selected

Stage New

Source Advertisement

Rating -- None --

Account Number

Web Site URL

Industry Telecommunications

DUNS Type

Year Started

Details

- History
- Folders
- Contacts
- Action Plans
- Activities
- Opportunities
- Quotes
- Projects
- Service Contracts
- Assets
- Tickets
- Relationships
- Documents
- Document Stores

**Figure 7.5 The Modify Account Page**

Click **Update** to commit the changes or **Cancel** to abandon them.

## 7.4.2 Deleting an Account

Click **Delete Account** on the **Account Details** page to delete an account. A pop-up window is displayed to confirm the deletion of the account, as shown in [Figure 7.6](#).

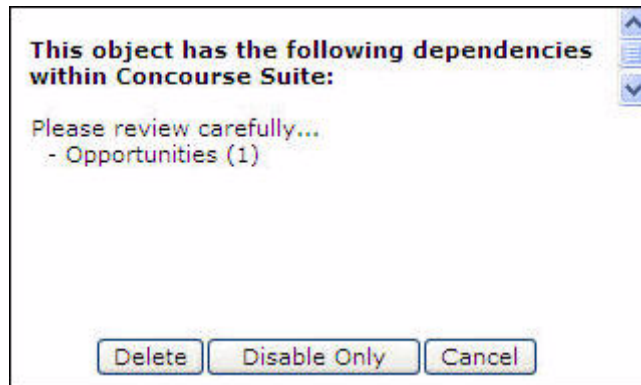


Figure 7.6 Confirm Delete Pop-up Window

### 7.4.3 Adding an Account

To add an account, click the **Add** link on the menu bar or click **Add Account** on the **Search Results** page. The **Add Account** page is displayed, as shown in [Figure 7.7](#).

---

**Note:** The **Add** page contains more details, and a truncated form of the page is shown in [Figure 7.7](#).

---

An account can represent an organization, or an individual. The type of account you are creating is the first field you must enter. If the account type is an organization, then the **Organization Name** is a mandatory field. If the account type is an individual, then the **Last Name** is a mandatory field. However, you can enter all information that you possess about this account to enable you to easily find the account in searches you perform later.

Enter details in the following sections to add an account:

- **New Account Details**, such as Account Type, Classification, DUNS Type and DUNS Number, and so on

**Accounts** → Accounts > Add Account

**Add a New Account**

Account Type(s)	None Selected <input type="button" value="[Select]"/>
Classification	<input checked="" type="radio"/> Organization <input type="radio"/> Individual
Account Name	<input type="text"/> *
Salutation	-- None -- <input type="button" value="v"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/> *
Stage	-- None -- <input type="button" value="v"/>
Source	-- None -- <input type="button" value="v"/>
Rating	-- None -- <input type="button" value="v"/>
Account Number	<input type="text"/>
Web Site URL	<input type="text"/>
Industry	-- None -- <input type="button" value="v"/>
DUNS Type	<input type="text"/>
Year Started	<input type="text"/>
No. of Employees	<input type="text"/>
Revenue	USD <input type="text" value="0"/>
Potential	USD <input type="text" value="0"/>
Ticker Symbol	<input type="text"/>
DUNS Number	<input type="text"/>

Figure 7.7 Adding an Account - Account Details

- Phone Numbers

**Phone Numbers**

Phone 1	Main <input type="button" value="v"/>	<input type="text"/>	ext. <input type="text"/>	<input type="radio"/> Primary
Phone 2	Fax <input type="button" value="v"/>	<input type="text"/>	ext. <input type="text"/>	<input type="radio"/> Primary

Figure 7.8 Adding an Account - Phone Numbers

- Addresses



Addresses	
Type	Primary <input checked="" type="checkbox"/> <input type="radio"/> Primary
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
City	<input type="text"/>
State/Province	-- None -- <input type="button" value="v"/>
Postal Code	<input type="text"/>
Country	UNITED STATES <input type="button" value="v"/>
County	<input type="text"/>
Latitude	<input type="text"/>
Longitude	<input type="text"/>
Type	Auxiliary <input checked="" type="checkbox"/> <input type="radio"/> Primary
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
City	<input type="text"/>
State/Province	-- None -- <input type="button" value="v"/>
Postal Code	<input type="text"/>
Country	UNITED STATES <input type="button" value="v"/>
County	<input type="text"/>
Latitude	<input type="text"/>
Longitude	<input type="text"/>

Figure 7.9 Adding an Account - Address

- Email Addresses

Email Addresses	
Email 1	Primary <input checked="" type="checkbox"/> <input type="text"/> <input type="radio"/> Primary
Email 2	Auxiliary <input checked="" type="checkbox"/> <input type="text"/> <input type="radio"/> Primary

Figure 7.10 Adding an Account - Email Addresses

- **Additional Details**

**Additional Details**

Notes

Where do you want to go after this action is complete?

View this account's details

Add a contact to this account  Copy email, phone and postal address

**Figure 7.11 Adding an Account - Additional Details**

You can select one of the following options at the bottom of the page:

- **View account details** - Selecting this option enables you to view the account details.
- **Add a contact to this account** - Selecting this option enables you to add a contact to the account.

Selecting the **Copy email, phone and postal address** option enables you to add new contacts without having to re-enter these details. This option is enabled only when you select the **Add a contact to this account** option.

Click **Insert** to save the account.

If you selected **View account details** option before inserting the new account, you are taken to the **Account Details** page, as shown in [Figure 7.4](#).

If you selected the **Add a contact to this account** option before inserting the new account, you are taken to the **Add Contact** page, as shown in [Figure 7.12](#). You may enter the relevant details and click one of the following options:

- **Save** - to save the contact.
- **Save & Clone** - to save the contact and add new contacts to the same account without having to re-enter common information.
- **Cancel** - to exit this page without saving.

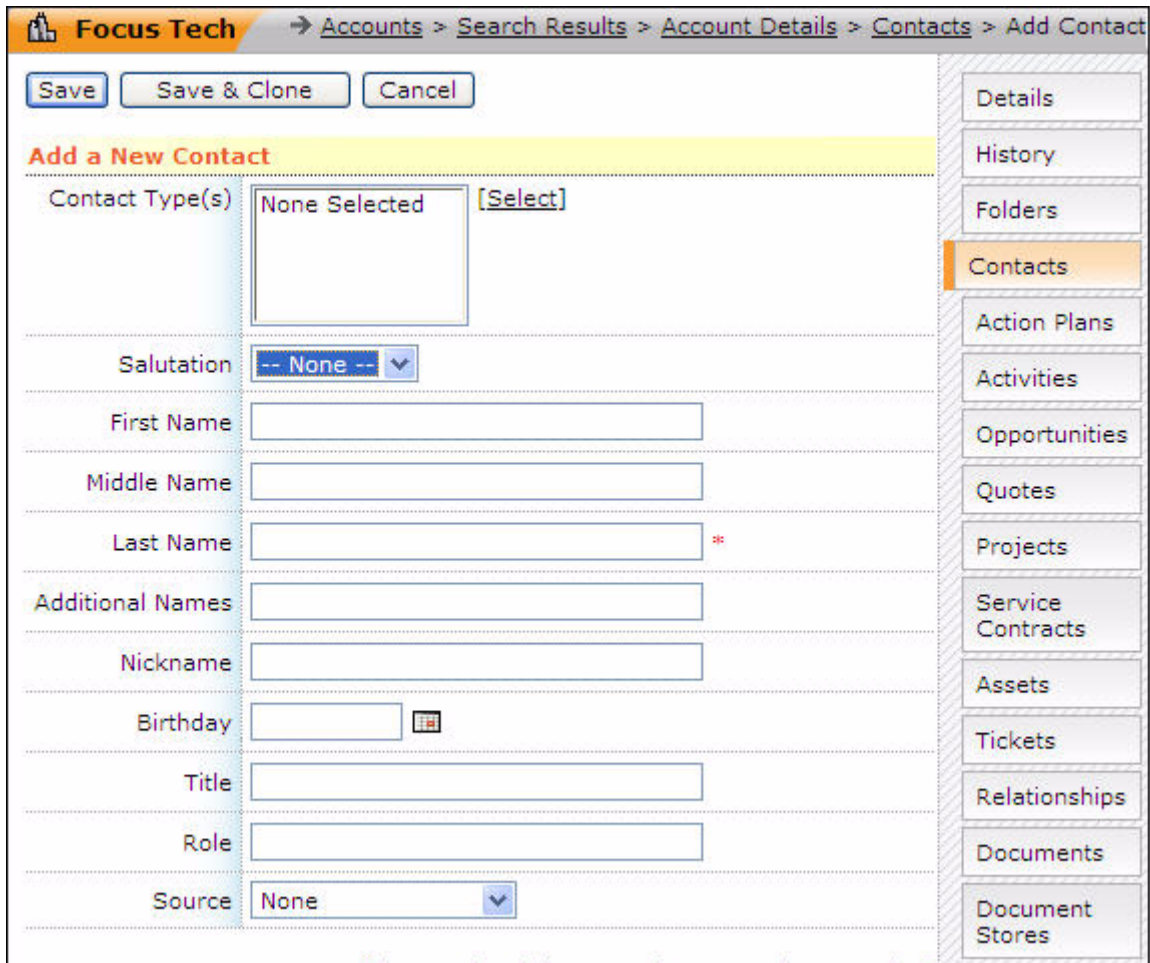


Figure 7.12 The Add Contact Page

## 7.5 Importing Accounts

The **Accounts** module provides an import feature that enables you to import account details from an external source saved in a Comma Separated Values (.CSV) file into ConcourseSuite.

To import accounts:

1. Click **Import** on the menu bar, as shown in [Figure 7.13](#).



Figure 7.13 Accounts Menu Bar

The **View Imports** page is displayed, as shown in [Figure 7.14](#).

Accounts		→ Accounts > View Imports					
New Import							
My Imports ▾		Records 1 to 1 of 1 total [Previous Next] ↻					
	Name	Status	Results			Entered ▲	Modified
			Total	Success	Failed		
⊖	New Import	Running	0	0	0	11/27/2007 2:51 AM	11/27/2007 2:51 AM

[Previous|Next] Page 1 of 1, Items per page: 10 ▾ Go

Figure 7.14 View Imports Page

2. Click **New Import**, as shown in [Figure 7.14](#).

The **New Import** page is displayed, as shown in [Figure 7.15](#).

Accounts		→ Accounts > View Imports > New Import	
New Import			
Name	<input type="text"/> *		
Description	<input type="text"/>		
Comments	<input type="text"/>		
Source	-- None -- ▾		
Rating	-- None -- ▾		
File	<input type="text"/>	Browse...	
* File should be in CSV format. Large files may take awhile to upload.			
Save		Cancel	

Figure 7.15 The New Import Page

For more details, refer to [Section 4.7, “Importing Leads”](#).

---

**Note:** The **Account Type** is also imported and specified in the .CSV files.

---

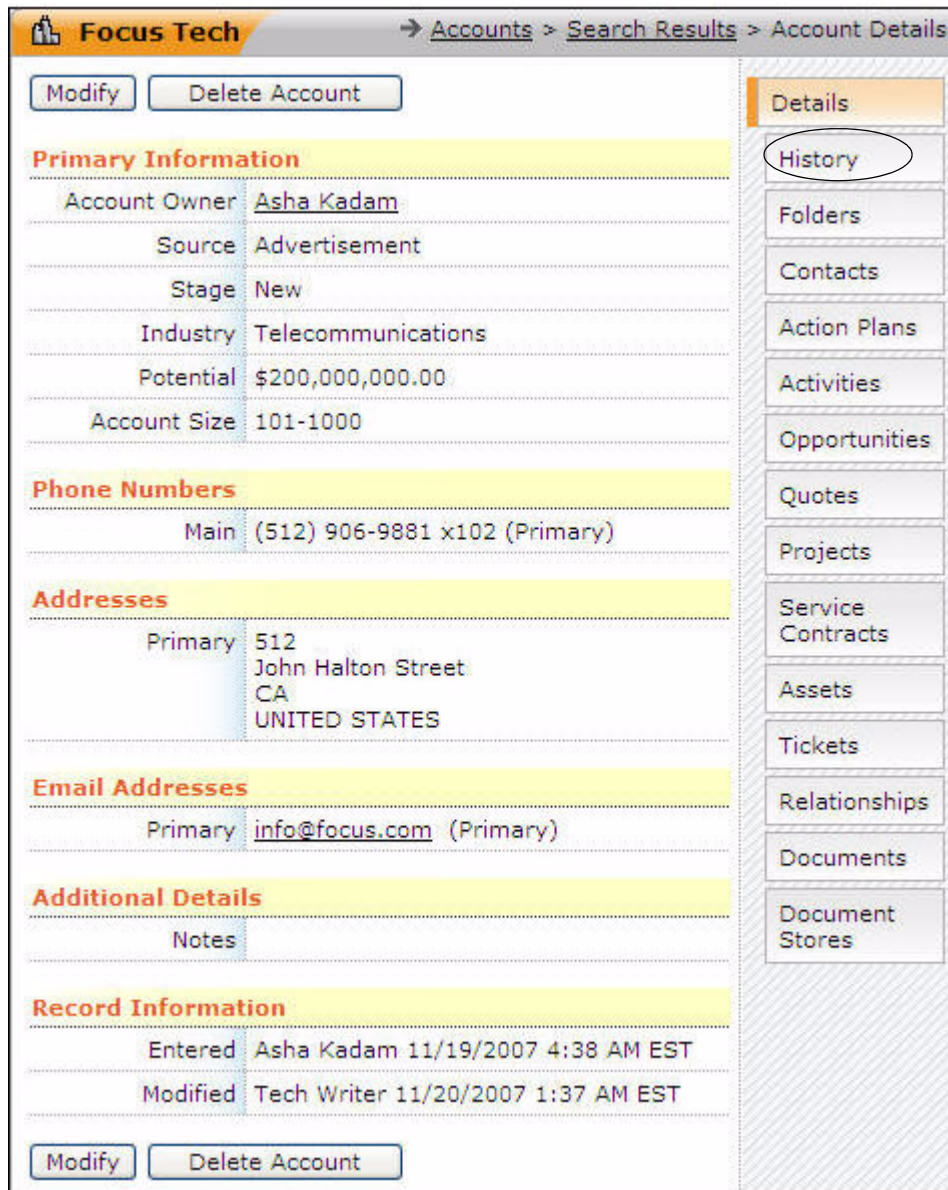
## 7.6 Exporting Accounts

This feature enables you to export account details. The **Export** page can be accessed by clicking **Export** on the accounts menu bar, as shown in [Figure 7.13](#).

The procedure to export accounts is similar to the procedure for exporting leads. For more details, refer to [Section 4.8, "Exporting Leads"](#).

## 7.7 Viewing History

History enables you to view information related to an account. You can access the **History** page by clicking the **History** sub-tab on the **Account Details** page. The **History** page is shown in [Figure 7.16](#).



The screenshot shows the 'Focus Tech' account details page. The breadcrumb trail is 'Accounts > Search Results > Account Details'. At the top, there are 'Modify' and 'Delete Account' buttons. The main content area is divided into several sections: 'Primary Information', 'Phone Numbers', 'Addresses', 'Email Addresses', 'Additional Details', and 'Record Information'. The 'History' sub-tab in the right-hand navigation menu is circled in red. The 'Primary Information' section includes fields for Account Owner (Asha Kadam), Source (Advertisement), Stage (New), Industry (Telecommunications), Potential (\$200,000,000.00), and Account Size (101-1000). The 'Phone Numbers' section shows a Main number: (512) 906-9881 x102 (Primary). The 'Addresses' section shows a Primary address: 512 John Halton Street, CA, UNITED STATES. The 'Email Addresses' section shows a Primary email: info@focus.com (Primary). The 'Record Information' section shows Entered by Asha Kadam on 11/19/2007 4:38 AM EST and Modified by Tech Writer on 11/20/2007 1:37 AM EST. At the bottom, there are 'Modify' and 'Delete Account' buttons.

Figure 7.16 Accessing the History Page

On the **History** page, You can view a specific set of history items by setting a filter. Click **Filters** to set a filter. You can set a filter, by selecting the relevant options, as

shown in [Figure 7.17](#). To activate the filter, click **Apply Filters**. For example, if the account contact does not wish to receive any email message, you can unsubscribe the same by clearing the selected option **Email Messages**, as shown in [Figure 7.17](#).

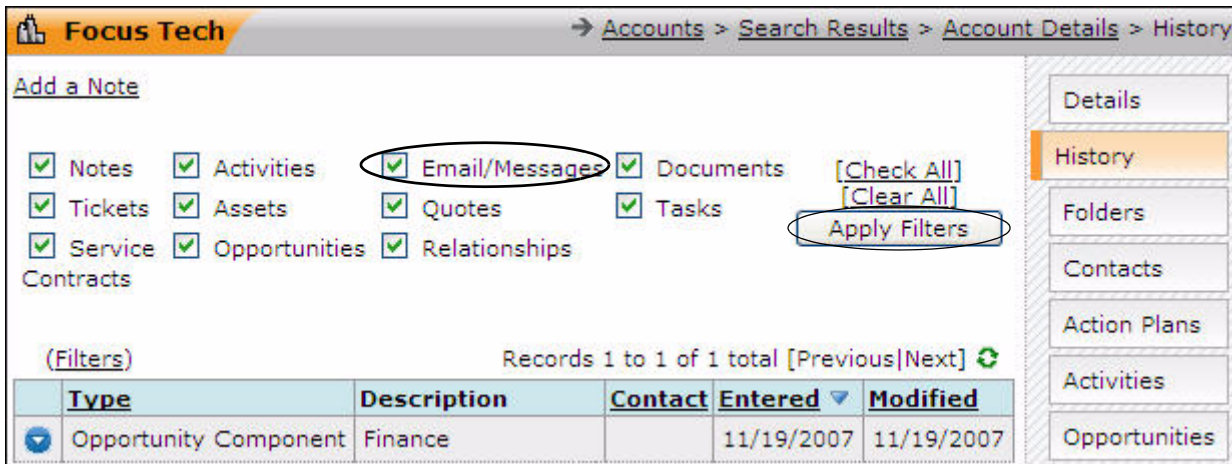


Figure 7.17 The History Page

## 7.8 Managing Folders

**Folders** is a powerful feature that enables you to store information associated with an account that is not available in the default database layout.

You can access the **Folders** page by clicking the **Folders** sub-tab on the **Account Details** page, as shown in [Figure 7.18](#). The **Folders** page is shown in [Figure 7.19](#).

**Focus Tech** → [Accounts](#) > [Search Results](#) > Account Details

Modify Delete Account

**Primary Information**

Account Owner	Asha Kadam
Source	Advertisement
Stage	New
Industry	Telecommunications
Potential	\$200,000,000.00
Account Size	101-1000

**Phone Numbers**

Main	(512) 906-9881 x102 (Primary)
------	-------------------------------

**Addresses**

Primary	512 John Halton Street CA UNITED STATES
---------	--

**Email Addresses**

Primary	info@focus.com (Primary)
---------	--------------------------

**Additional Details**

Notes	
-------	--

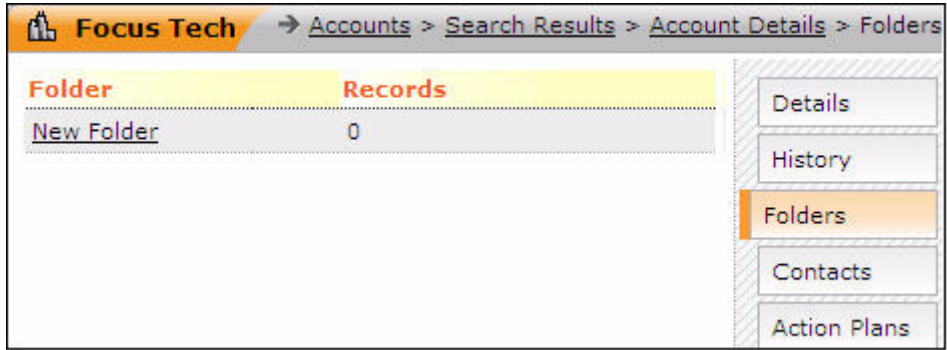
**Record Information**

Entered	Asha Kadam 11/19/2007 4:38 AM EST
Modified	Tech Writer 11/20/2007 1:37 AM EST

Modify Delete Account

Details  
History  
**Folders**  
Contacts  
Action Plans  
Activities  
Opportunities  
Quotes  
Projects  
Service Contracts  
Assets  
Tickets  
Relationships  
Documents  
Document Stores

Figure 7.18 Accessing the Folders Page



**Figure 7.19 The Folders Page**

You can add any number of folders into this module from the **Admin** module. For more details, refer to [Section 16.7.1, “Creating Custom Folders and Fields”](#). After an administrator configures a folder and enables it, you can navigate to the account folder and add files to the folder.

## 7.9 Viewing Contacts

You can access the **Contacts** page by clicking the **Contacts** sub-tab on the **Account Details** page, as shown in [Figure 7.20](#).



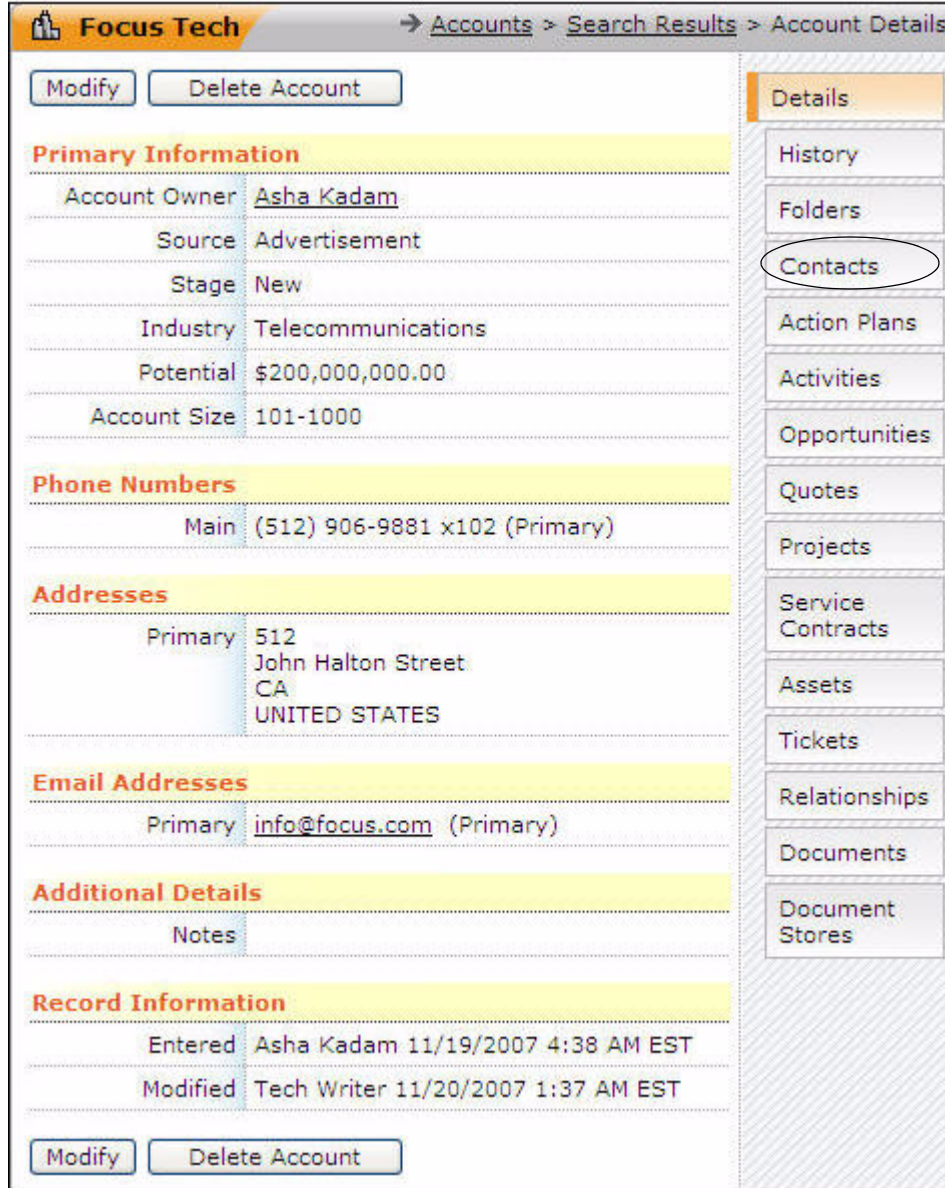



Figure 7.20 Accessing the Contacts Page

The **Contacts** page, as shown in [Figure 7.21](#), displays all the contacts related to this account. By default, it will display 10 contacts per page. You can add a contact by clicking **Add a Contact**. When you click  in the first column of the table, a context menu is displayed. The following options are available on the context menu:

- **View Details** - to view details of the contact.
- **Modify** - to edit details of the contact.
- **Log an Activity** - to record an activity for this account.
- **Schedule an Activity** - to schedule new activities.
- **View Activities** - view a list of activities.

- **Move** - to move the contact.
- **Clone** - to duplicate the contact.
- **Send Address Request** - enables you to send a message to the contact.
- **Download vCard** - to download details of the contact in vCard format.
- **Delete** - to remove the contact from your database.

These options are similar to those found in the main **Contacts** tab, except that the options in this menu are directly related to a contact associated with an account.

For more details on logging and scheduling activities, refer to [Section 5.6, "Recording and Planning Activities"](#).

For more information on downloading vCard, refer to [Section 5.3.8, "Downloading a vCard"](#).

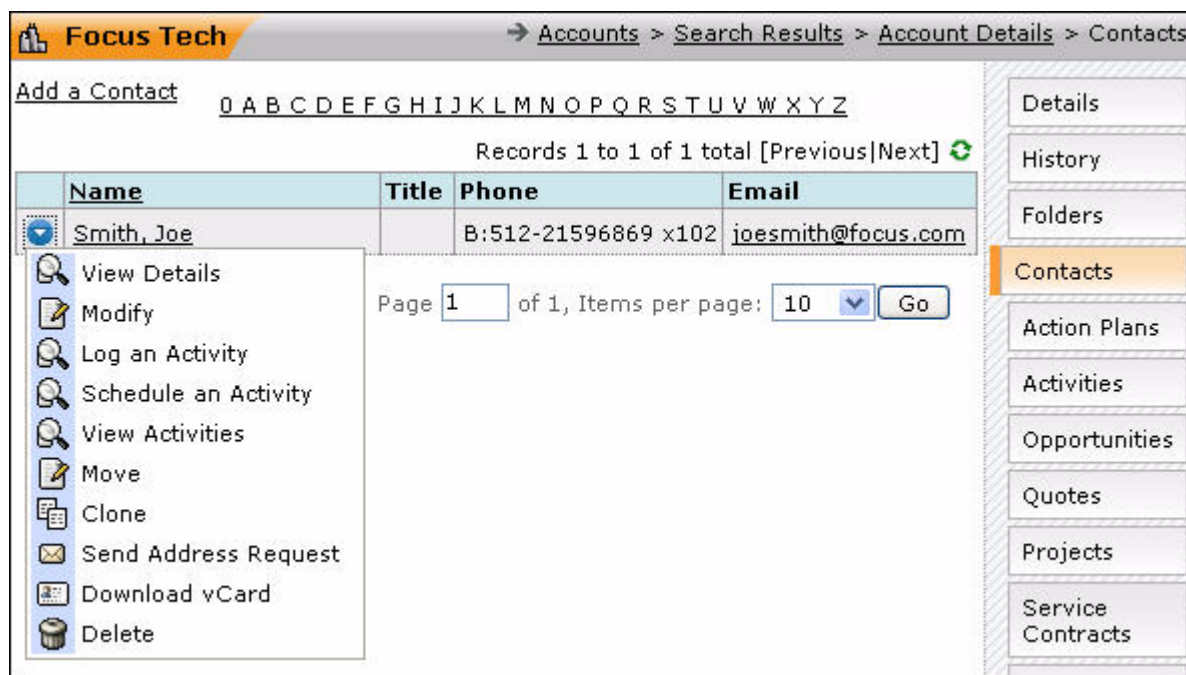


Figure 7.21 The Contacts Page

One important concept that is unique to an account contact is the portal function. Portals can be viewed by selecting a contact and examining the contacts sub-tabs located at the right.

## 7.9.1 Accessing Messages

A chronological record of every communication sent to the contact, whether through a campaign in communications, or by an email sent from another part of ConcourseSuite, can be viewed through the **Accounts** tab.

To access message details for a contact associated with an account:

1. Click **Search** on the **Accounts** menu bar, shown in [Figure 7.22](#).  
The **Search Accounts** page is displayed, as shown in [Figure 7.23](#).



Figure 7.22 Accessing the Accounts Module

- Specify the account details in the **Account Information Filters** section. Ensure you select **Include contacts in search results**, as shown in [Figure 7.23](#).

Figure 7.23 The Search Accounts Page

- Click **Search**.

The search results are displayed, as shown in [Figure 7.24](#).

**Accounts** → Accounts > Search Results

Add an Account

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 3 of 3 total [Previous|Next] ↻

	Name	Title	Account Name	Phone/Fax	Email
▼	Doe, Mike		Doe, Mike		
▼	Fenton, Beth		Focus Tech		
▼	Smith, Joe		Focus Tech		

[Previous|Next] Page 1 of 1, Items per page: 10 [Go]

Figure 7.24 The Search Results Page

- Click the contact name link, as shown in [Figure 7.24](#).  
The contact details are displayed, as shown in [Figure 7.25](#).

**Focus Tech** **Joe Smith** → Accounts > Search Results > Account Details > Contacts > Contact Details

Details | History | Folders | Activities | **Messages** | Documents | Opportunities | Portal

Modify | Clone | Delete | Move | Download vCard

☎ ☏ ✉ IM 📱 📧

**Email Addresses**  
No email addresses entered.

**Instant Message Addresses**  
No instant message addresses entered.

**Text Message Addresses**  
No text message addresses entered.

**Phone Numbers**  
No phone numbers entered.

**Addresses**  
No addresses entered.

**Record Information**  
Entered: Asha Kadam 12/20/2007 6:18 AM EST  
Modified: Asha Kadam 12/20/2007 6:18 AM EST

Modify | Clone | Delete | Move | Download vCard

Details  
History  
Folders  
**Contacts**  
Action Plans  
Activities  
Opportunities  
Quotes  
Projects  
Service Contracts  
Assets  
Tickets  
Relationships  
Documents  
Document Stores

Figure 7.25 The Contact Details Page

- Click **Messages**.  
You can view the message details related to this contact, as shown in [Figure 7.26](#).

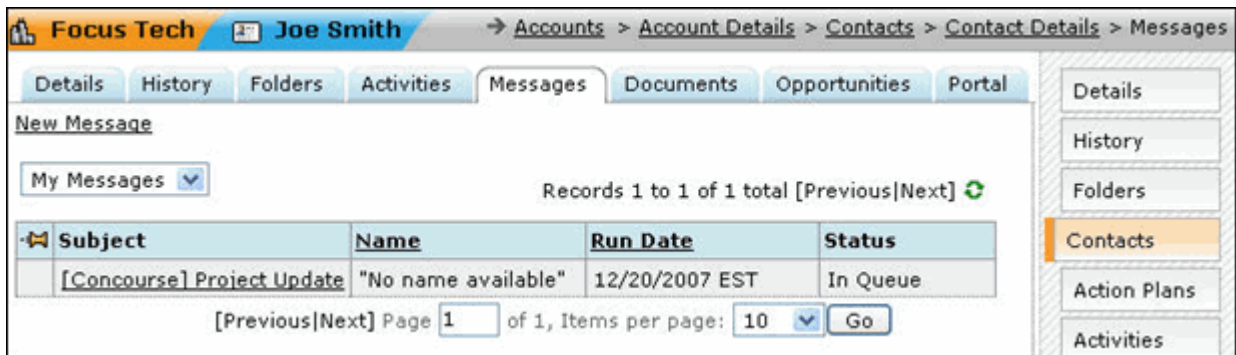


Figure 7.26 Viewing the List of Messages

### 7.9.1.1 Sending Messages

This section guides you through the steps of sending a new message to a contact.

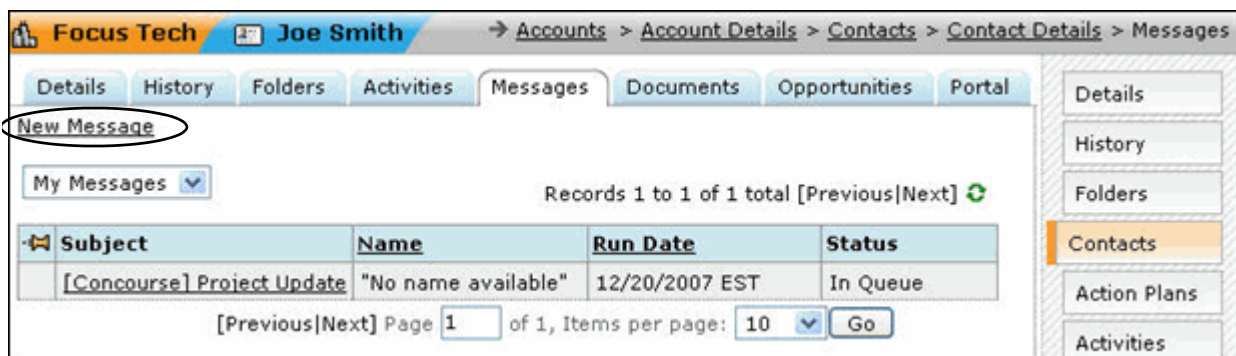


Figure 7.27 The Messages Page

1. Click **New Message**, shown in [Figure 7.27](#).

The **New Message** page is displayed, as shown in [Figure 7.28](#). You can attach files to the message.

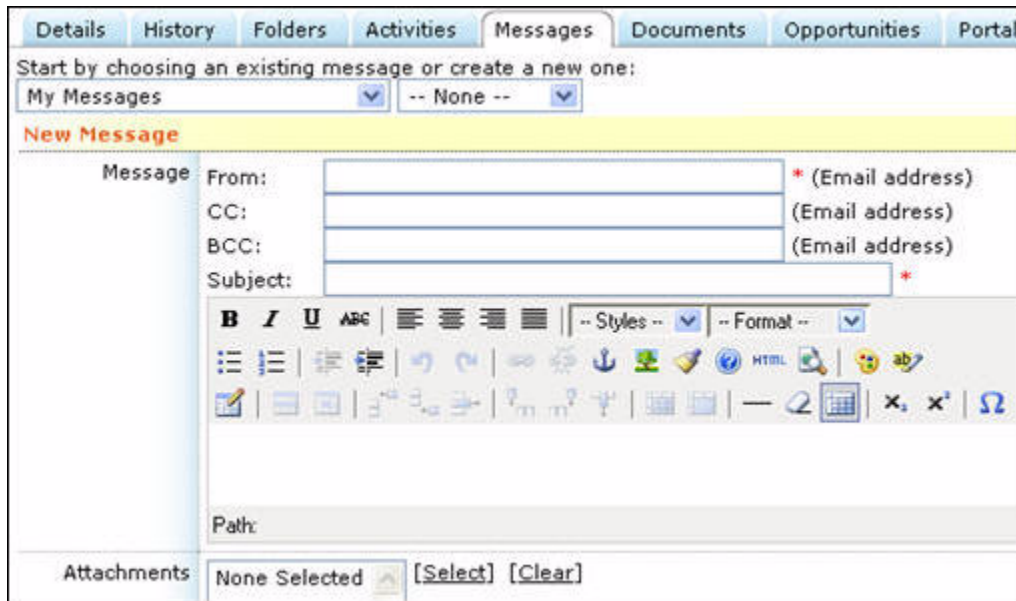


Figure 7.28 The New Message Page

For more details, refer to [Section 5.7, “Sending Messages”](#).

## 7.9.2 Adding and Accessing Documents

Documents stored through the **Contacts** module, against a contact associated with an account, can be viewed through the **Contacts** page of the **Accounts** module. You can also add documents in this module.

To access the **Documents** page from the **Contact Details** page:

1. Click the contact name, shown in [Figure 7.21](#).

The **Contacts Details** page is displayed, as shown in [Figure 7.29](#).

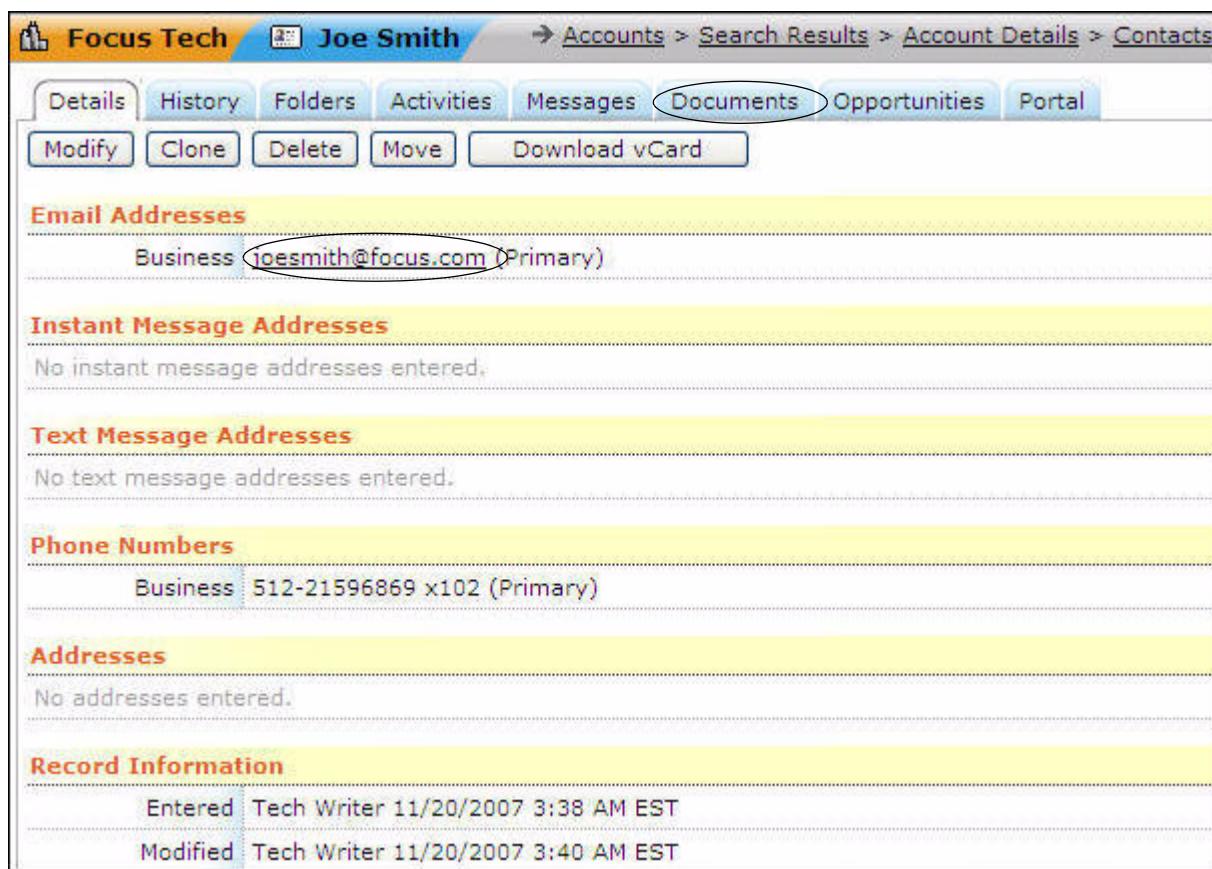


Figure 7.29 The Contact Details Page

2. Click **Documents**, shown in [Figure 7.29](#).

The **Documents** page is displayed, as shown in [Figure 7.30](#).

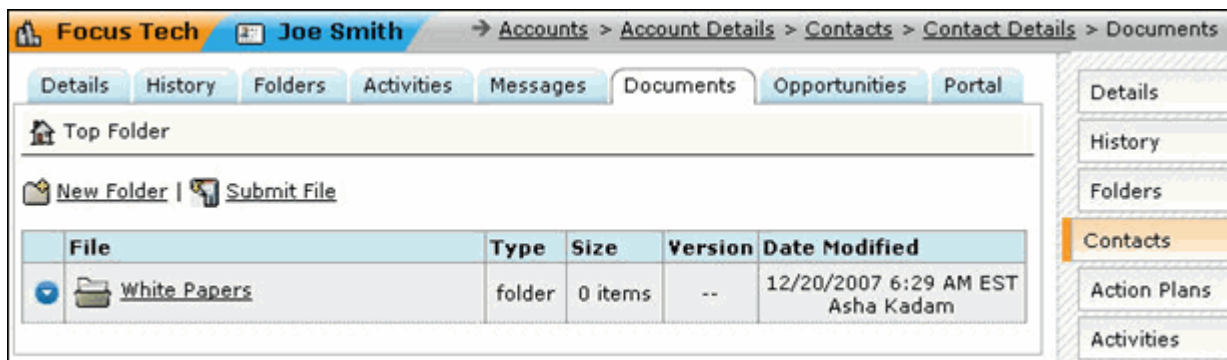


Figure 7.30 The Documents Page

For more details, refer to [Section 5.8, "Adding and Accessing Documents"](#).

## 7.9.2.1 Viewing Portals

The **Portals** feature provides customers access to their account information. For example, consider a contact related to an account. This contact can view details pertaining to the account.

If the user is not a portal user, a page displaying the access status is displayed, as shown in [Figure 7.31](#).

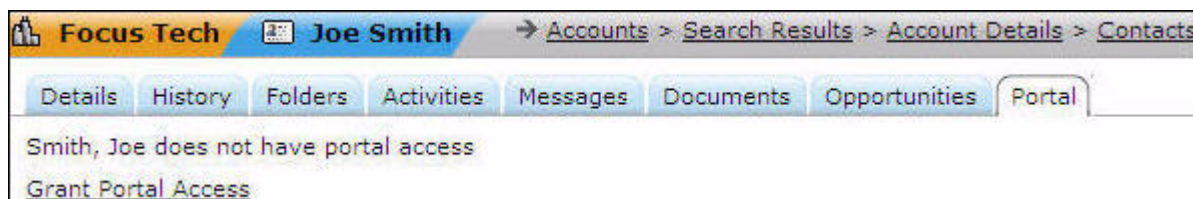


Figure 7.31 Account Contacts' Portal Access

You can perform the following actions on portals, as shown in [Figure 7.32](#):

- Modify the information
- Set an expiration date
- Change password of the contact
- Send an email about the change

The portal users are informed of their new portal account, after it has been created, by an email.

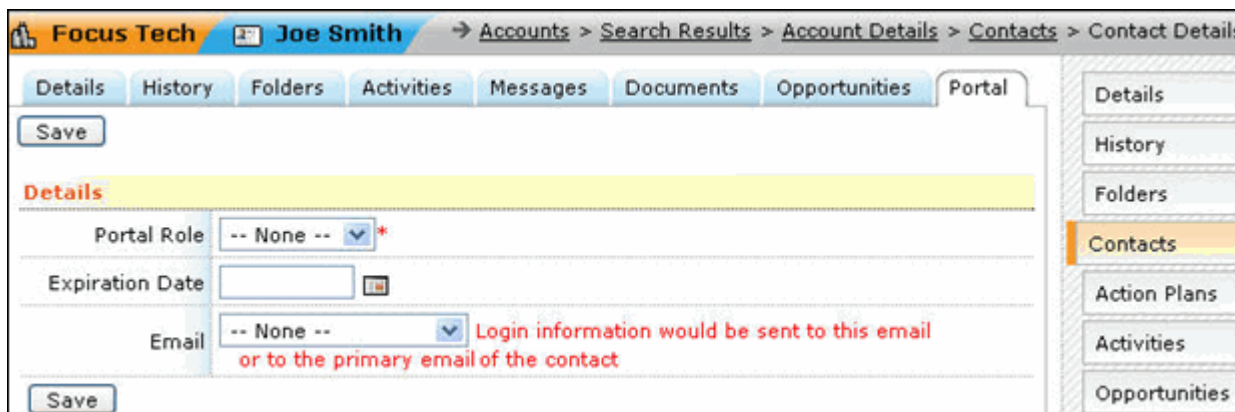


Figure 7.32 Granting Portal Access

When users log in to the portal, they can view the accounts they have access to. A page showing details of the user's account and tabs representing contacts, contracts, assets, and tickets is displayed, as shown in [Figure 7.33](#).



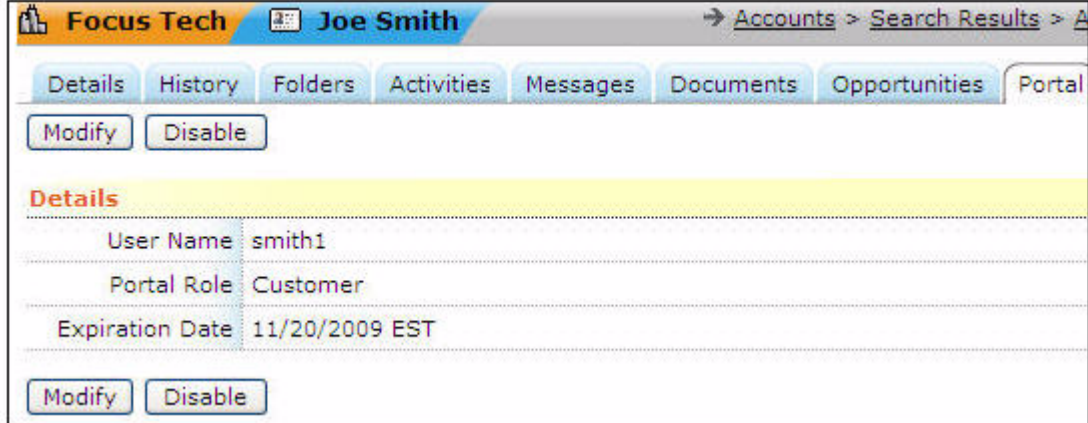


Figure 7.33 Portal Access Details

The data is read only, except for **Tickets**, where the users are allowed to enter a trouble ticket with a reduced set of data. This data will be displayed in the **Help Desk** module and will also be associated with the account.

The **Portal** feature provides added service to an existing customer. This feature acts as a gateway that enables you and your customers to work together to keep information updated.

## 7.10 Managing Action Plans

Clicking the **Action Plans** sub-tab on the **Account Details** page, shown in [Figure 7.34](#) displays the **Action Plans** page, with a list of action plans created for a particular account, as shown in [Figure 7.35](#).

Focus Tech → Accounts > Search Results > Account Details

Modify Delete Account

**Primary Information**

Account Owner	Asha Kadam
Source	Advertisement
Stage	New
Industry	Telecommunications
Potential	\$200,000,000.00
Account Size	101-1000

**Phone Numbers**

Main	(512) 906-9881 x102 (Primary)
------	-------------------------------

**Addresses**

Primary	512 John Halton Street CA UNITED STATES
---------	--

**Email Addresses**

Primary	info@focus.com (Primary)
---------	--------------------------

**Additional Details**

Notes

**Record Information**

Entered	Asha Kadam 11/19/2007 4:38 AM EST
Modified	Tech Writer 11/20/2007 1:37 AM EST

Modify Delete Account

Details  
History  
Folders  
Contacts  
**Action Plans**  
Activities  
Opportunities  
Quotes  
Projects  
Service Contracts  
Assets  
Tickets  
Relationships  
Documents  
Document Stores

Figure 7.34 Accessing the Action Plans Sub-Tab

Action plans requiring attention are highlighted. For more details, refer to [Section 16.7.3, "Using Action Plan Editor"](#).

Assigned	Name	Action Required	Weekly Potential	Current Phase	Days in Phase	Days Active	Values from Plan	Last Update
Tech Writer	Launch New Product	No	\$200,000,000.00	Action Plan		0	Step 1: Attach Opportunity Step 2:	11/20/200 4:51 AM
Tech Writer	Create Call List	No	\$200,000,000.00	Action Plan		0		11/20/200 4:52 AM
Tech Writer	New Action Plan	No	\$200,000,000.00	Action Plan		0		11/20/200 4:52 AM
Tech Writer	New Action Plan	Yes	\$200,000,000.00	Phase 1	0	0	Step 2: Attach Document	11/20/200 6:14 AM

Figure 7.35 The Action Plans Page

### 7.10.1 Adding an Action Plan

An action plan can be created for an account by clicking **Add Action Plan** on the **Action Plans** page, shown in [Figure 7.35](#). The **Add Action Plan** page is displayed, as shown in [Figure 7.36](#). The following fields are required entries for adding an action plan:

- Name of the action plan
- Manager of the action plan
- User assigned to the action plan


The manager of the plan has the permission to perform the following tasks:

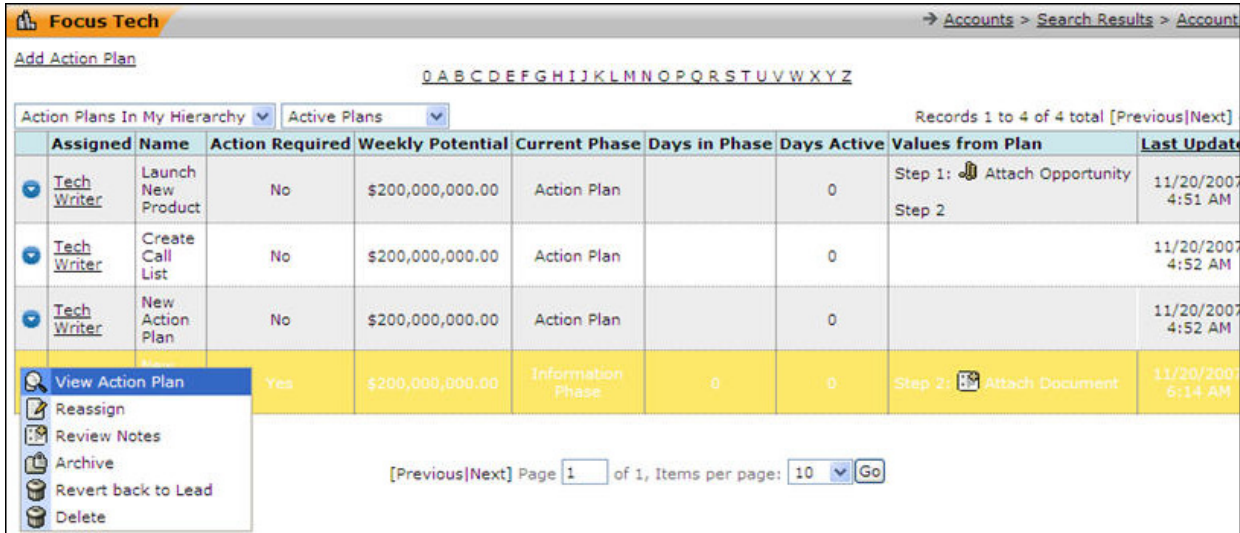
- Restart the action plan
- Re-assign the action plan
- Delete the action plan

The user assigned to the action plan is responsible for completing the steps specified in the action plan.

Figure 7.36 Add an Action Plan for an Account

## 7.10.2 Viewing Action Plan Details

When you click  on the **Action Plans** page, a context menu is displayed, as shown in [Figure 7.37](#). Selecting **View Action Plan** on this menu enables you to view the **Action Plan Details** page, as shown in [Figure 7.38](#).



The screenshot shows the 'Focus Tech' interface with a table of action plans. A context menu is open over the 'View Action Plan' option. The table has the following data:

Assigned	Name	Action Required	Weekly Potential	Current Phase	Days in Phase	Days Active	Values from Plan	Last Update
Tech Writer	Launch New Product	No	\$200,000,000.00	Action Plan		0	Step 1: Attach Opportunity Step 2	11/20/2007 4:51 AM
Tech Writer	Create Call List	No	\$200,000,000.00	Action Plan		0		11/20/2007 4:52 AM
Tech Writer	New Action Plan	No	\$200,000,000.00	Action Plan		0		11/20/2007 4:52 AM
		Yes	\$200,000,000.00	Information Phase	0	0	Step 2: Attach Document	11/20/2007 6:14 AM


The context menu includes the following options: View Action Plan, Reassign, Review Notes, Archive, Revert back to Lead, and Delete.

**Figure 7.37 Viewing the Context Menu**

This page displays the various phases in the action plan. Each phase consists of a series of sequential steps. Steps of an action plan can be completed on the **Action Plan Details** page, as shown in [Figure 7.38](#).

Each step can be completed by a single user or a set of users as defined in the action plan template. The current phase and steps are highlighted in the **Action Plan Details** page. You can complete the highlighted steps of the current phase or any one of the steps of the global phase. On completion of one step of the action plan, email alerts are sent to the owners of the current and the next steps of the plan. You can also add, attach, or review several actions for steps of a plan.

Once all steps of a phase are completed, the steps of the next phase are highlighted. On completion of the last phase of the plan, the plan is said to be completed.

Clicking  beside **Actions** displays a context menu, as shown in [Figure 7.38](#). The options available on this menu enable the plan manager to reassign, restart, or delete the plan.

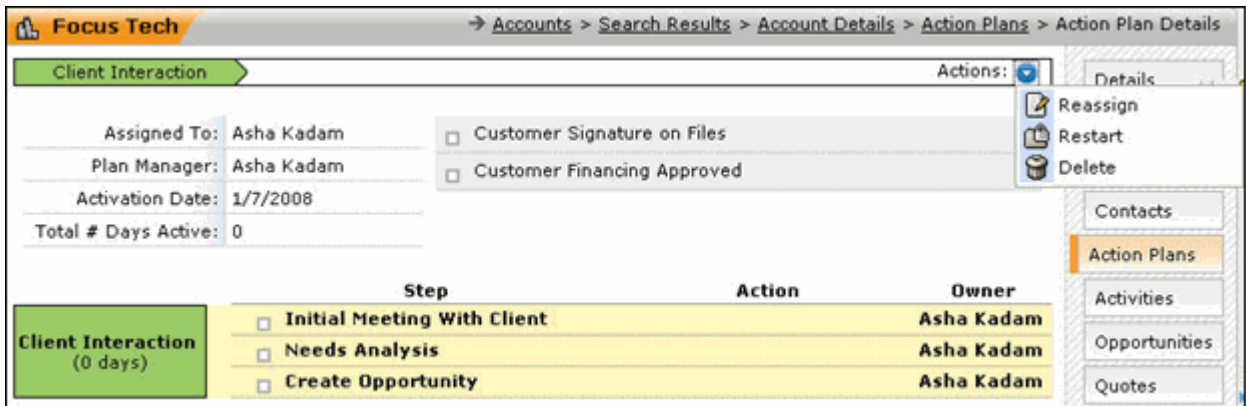


Figure 7.38 The Action Plan Details Page

## 7.11 Adding Activities

You can access the **Activities** page by clicking the **Activities** sub-tab on the **Account Details** page, as shown in [Figure 7.39](#).

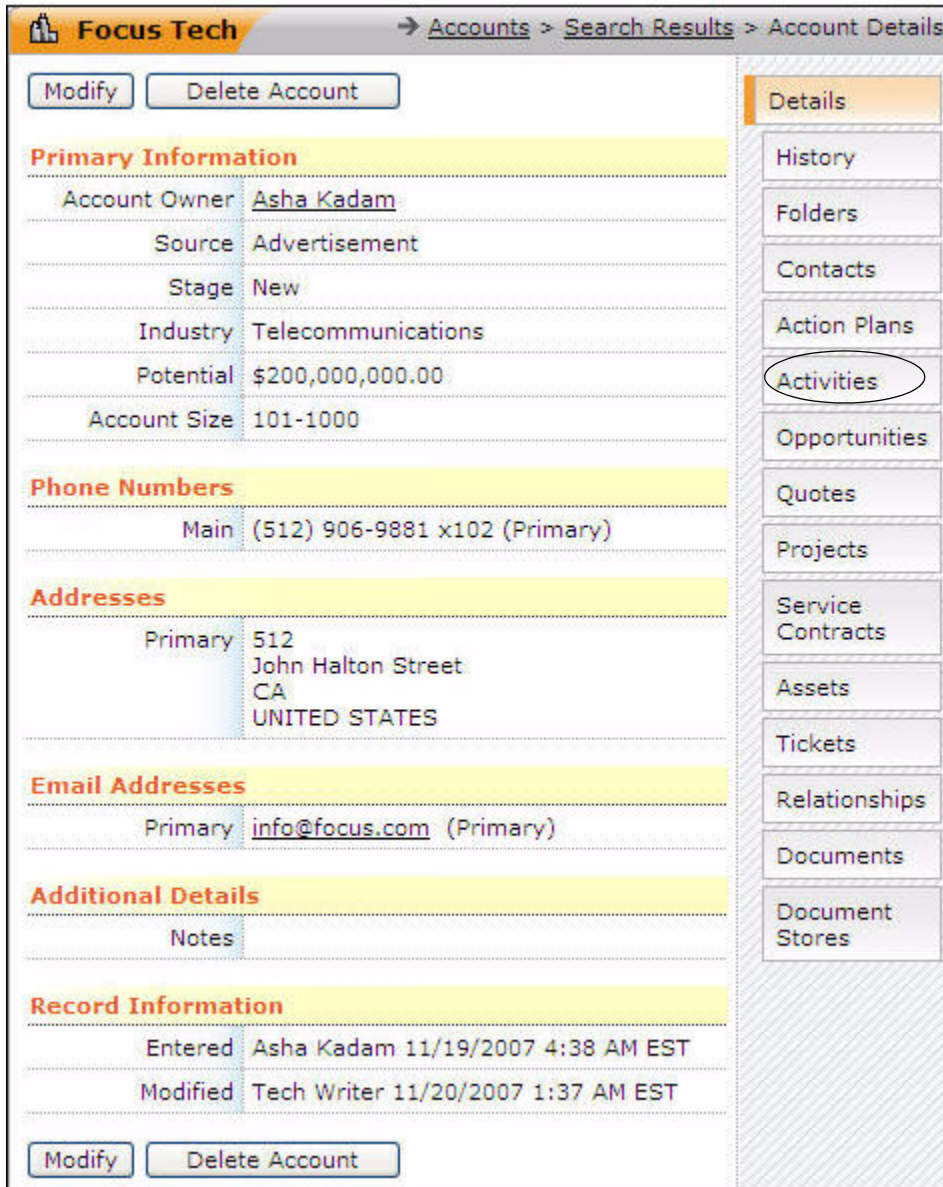


Figure 7.39 Accessing the Activities Page

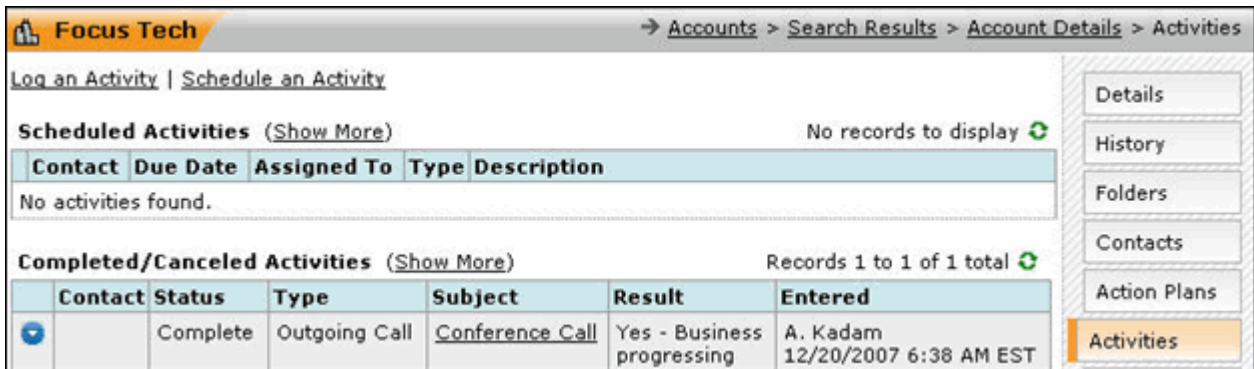
The **Activities** feature in the **Accounts** module is almost identical to those in the **Contacts** and **Pipeline** modules. While the **Activities** page of the **Contacts** module displays only those activities that are associated with a particular contact, and the **Activities** page of the **Pipeline** module only displays activities related to a particular opportunity, the **Activities** page in the **Accounts** module displays all activities for an account across contacts.

The **Activities** feature in the **Accounts** module enables you to record activities as the activities occur, and to plan your future course of action by scheduling activities.

You can record and schedule activities for the following entities:

- An account, without specifying the contacts.
- A particular contact associated with an account.

You can log an activity or schedule an activity for the account on the **Activities** page, as shown in [Figure 7.40](#).



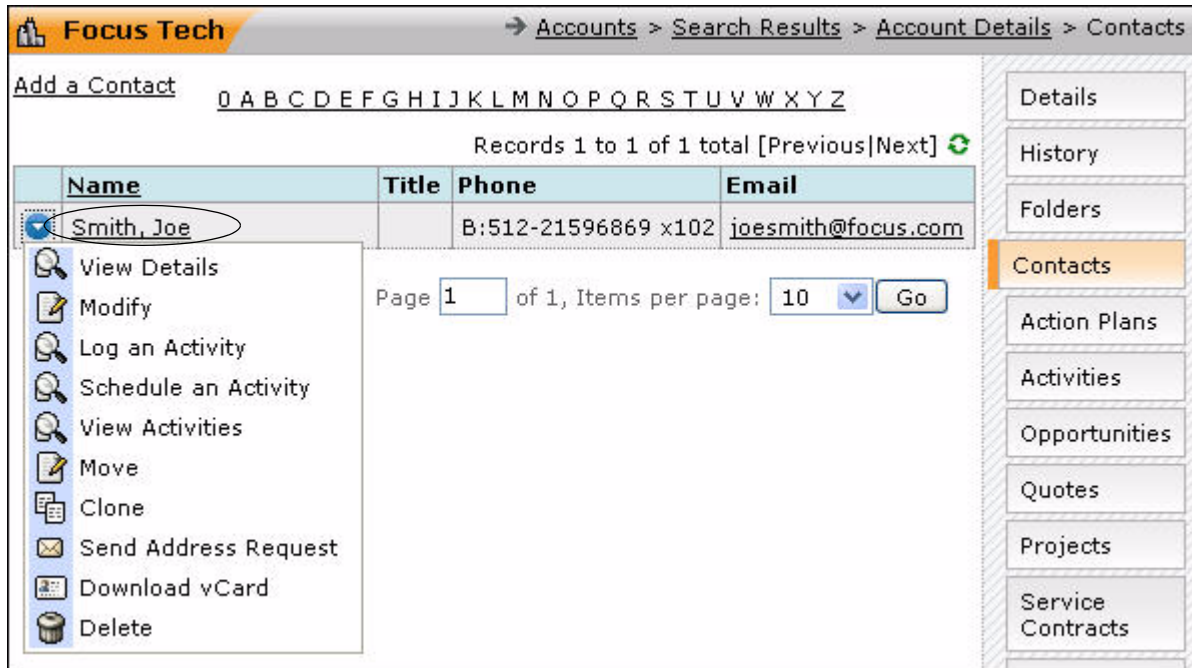
**Figure 7.40 Logging and Scheduling an Activity**

For more details, refer to [Section 5.6.1, “Log an Activity”](#) and [Section 5.6.2, “Schedule an Activity”](#).

To record an activity for a particular contact associated with an account:

1. Click the **Contacts** sub-tab on the **Account Details** page.

A list of contacts associated with this account is displayed, as shown in [Figure 7.41](#).



**Figure 7.41 Viewing Contact List**

2. Click the contact name link, shown in [Figure 7.41](#).

The contact details are displayed, as shown in [Figure 7.42](#).

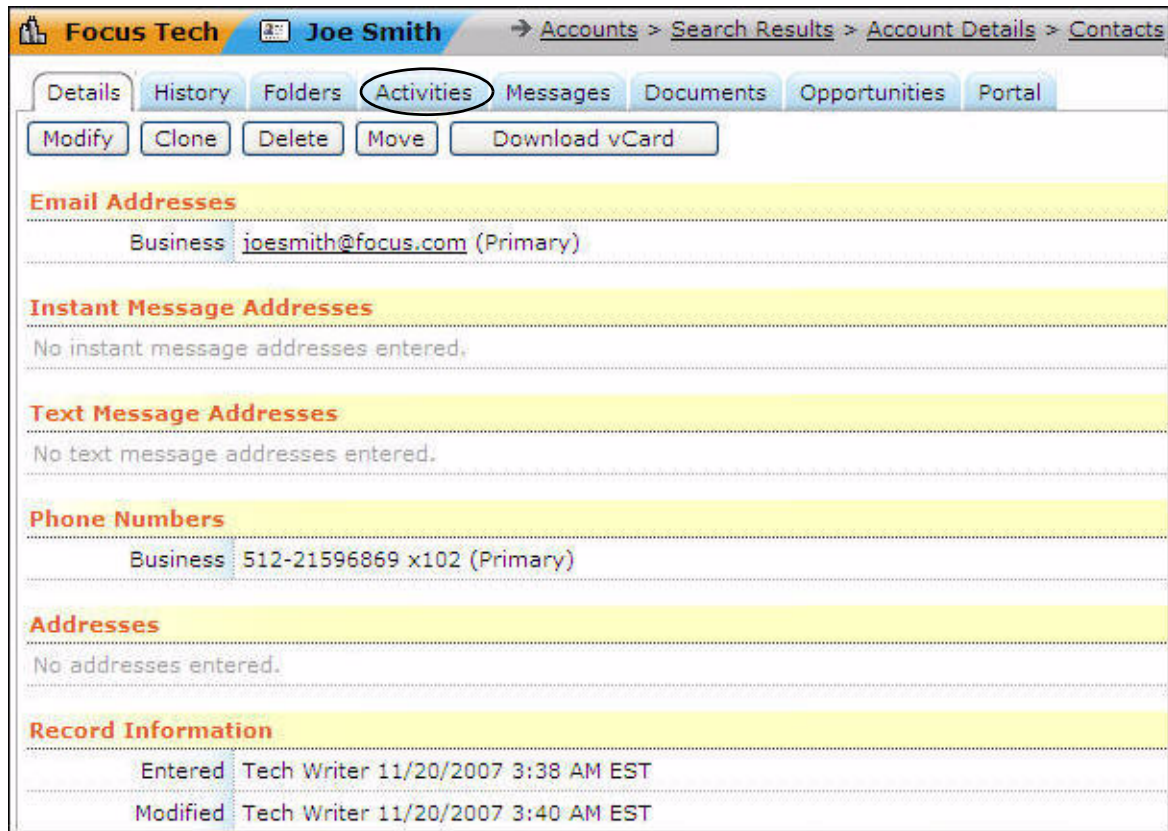


Figure 7.42 Viewing Contact Details

3. Click the **Activities** tab, shown in [Figure 7.42](#).

A new page allowing you to log an activity or schedule an activity for the contact "Mr. Joe Smith" who is associated with the account "Focus Tech" is displayed, as shown in [Figure 7.43](#).

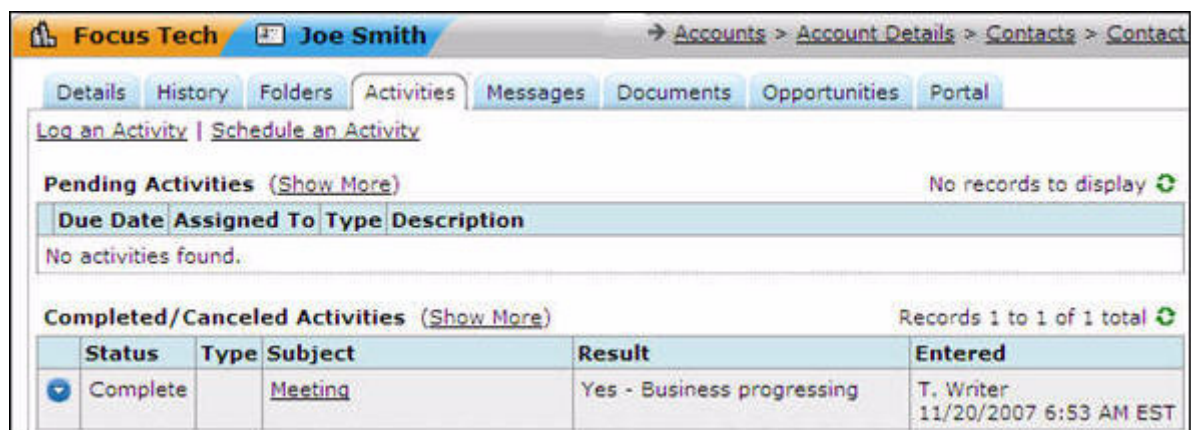


Figure 7.43 Viewing the Activities Window

For more details, refer to [Section 5.6.1, "Log an Activity"](#) and [Section 5.6.2, "Schedule an Activity"](#).



## 7.12 Adding Opportunities

You can access the **Opportunities** page by clicking the **Opportunities** sub-tab on the **Account Details** page, as shown in [Figure 7.44](#).

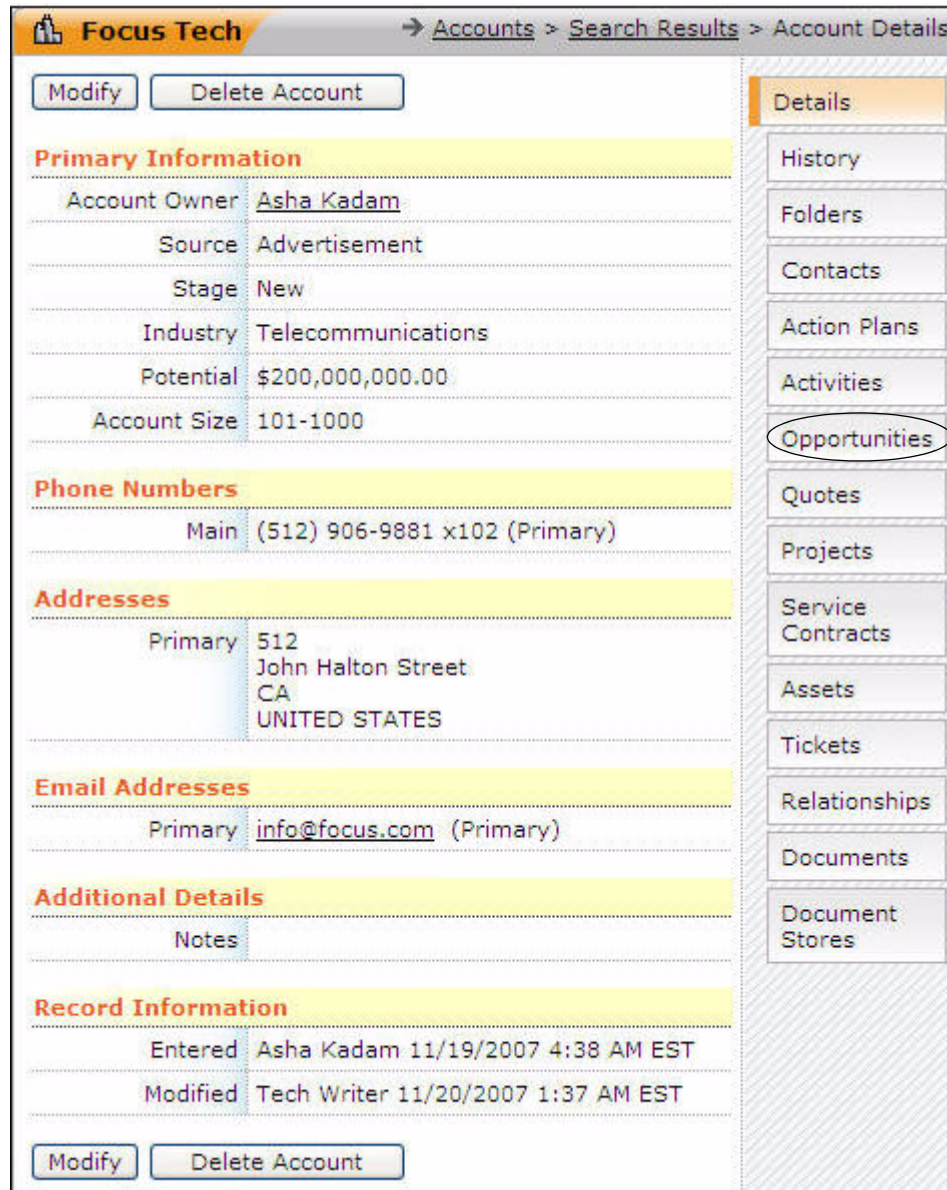


Figure 7.44 Accessing the Opportunities Page

The **Opportunities** feature in the **Accounts** module is similar to that in the **Pipeline** module, except that all the opportunities in this module are related to the account that you are currently viewing.

Clicking the **Opportunities** sub-tab on the **Account Details** page displays the **Opportunities** page, as shown in [Figure 7.45](#). This page lists the opportunities associated with the account you are viewing.

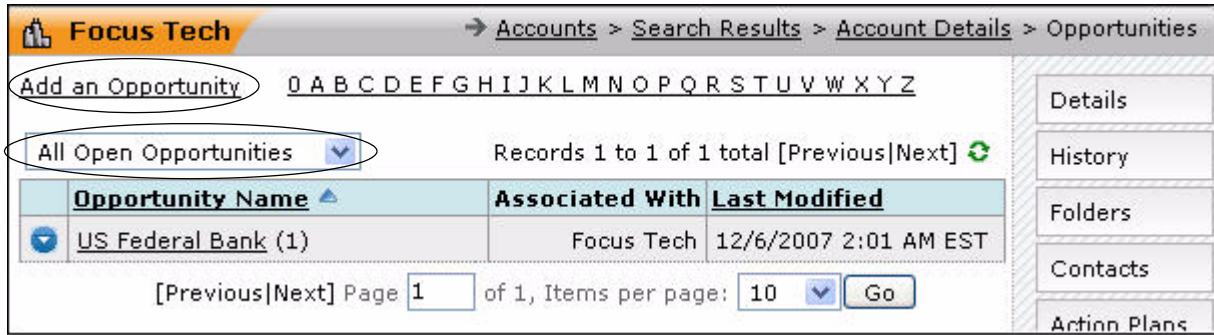


Figure 7.45 The Opportunities Page

You can filter the list of opportunities by selecting any one of the following options from the drop-down list in the upper left of the page:

- My Open Opportunities
- All Open Opportunities
- All Closed Opportunities

You can also add an opportunity by clicking the **Add an Opportunity** link, as shown in [Figure 7.45](#).

To examine any opportunity, click the name of the opportunity. This displays the **Opportunity Details** page, summarizing its components, as shown in [Figure 7.46](#).



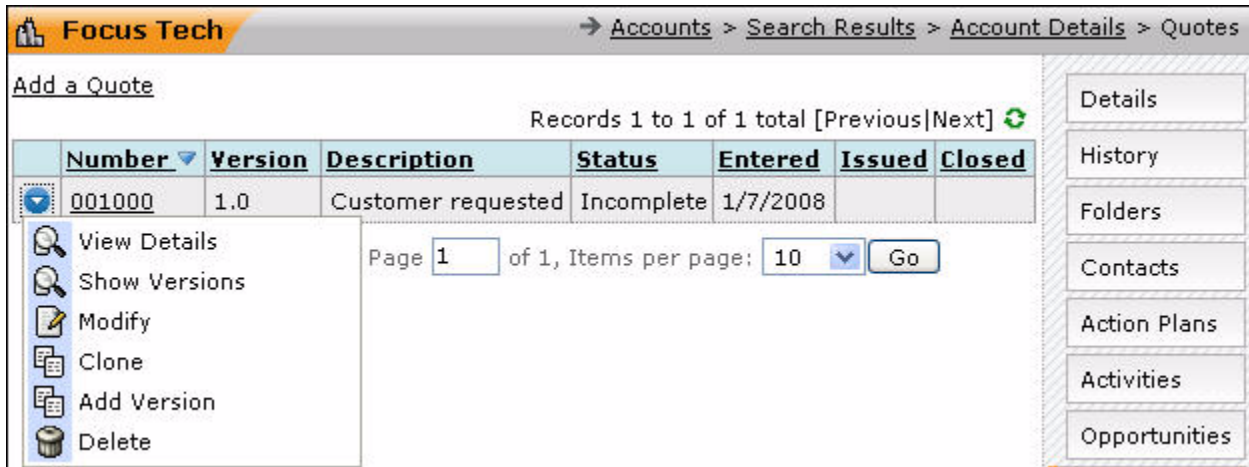
Figure 7.46 Viewing the Component Details

## 7.13 Adding Quotes


You can access the **Quotes** page by clicking the **Quotes** sub-tab on the **Account Details** page, as shown in [Figure 7.47](#).

Figure 7.47 Accessing the Quotes Page

Your customers should be informed of your offers and prices. These are usually in the form of a quote. The **Quotes** page displays the details of all the quotes related to an account, as shown in [Figure 7.48](#). You can add a quote by clicking **Add a Quote**. For more details, refer to [Section 9.3, "Adding a Quote"](#).



**Figure 7.48 The Quotes Page**

Clicking  in the first column of the tabular listing displays a context menu which allows you to perform the following tasks:

- View quote details
- View different versions of quote
- Modify or clone a quote
- Add another version
- Delete a quote

For more details, refer to [Chapter 9, "Understanding Quotes"](#).

## 7.14 Viewing Projects

You can access the **Projects** page by clicking the **Projects** sub-tab on the **Account Details** page, as shown in [Figure 7.49](#).

**Focus Tech** → [Accounts](#) > [Search Results](#) > Account Details

[Modify](#) [Delete Account](#)

**Primary Information**

Account Owner	Asha Kadam
Source	Advertisement
Stage	New
Industry	Telecommunications
Potential	\$200,000,000.00
Account Size	101-1000

**Phone Numbers**

Main	(512) 906-9881 x102 (Primary)
------	-------------------------------

**Addresses**

Primary	512 John Halton Street CA UNITED STATES
---------	--

**Email Addresses**

Primary	info@focus.com (Primary)
---------	--------------------------

**Additional Details**

Notes

**Record Information**

Entered	Asha Kadam 11/19/2007 4:38 AM EST
Modified	Tech Writer 11/20/2007 1:37 AM EST

[Modify](#) [Delete Account](#)

**Details**

History

Folders

Contacts

Action Plans

Activities

Opportunities

Quotes

**Projects**

Service Contracts

Assets

Tickets

Relationships

Documents

Document Stores

**Figure 7.49 Accessing the Projects Page**

The **Projects** page is shown in [Figure 7.50](#). This page displays all projects related to an account.

For more details, refer to [Chapter 11, "Managing Projects"](#).

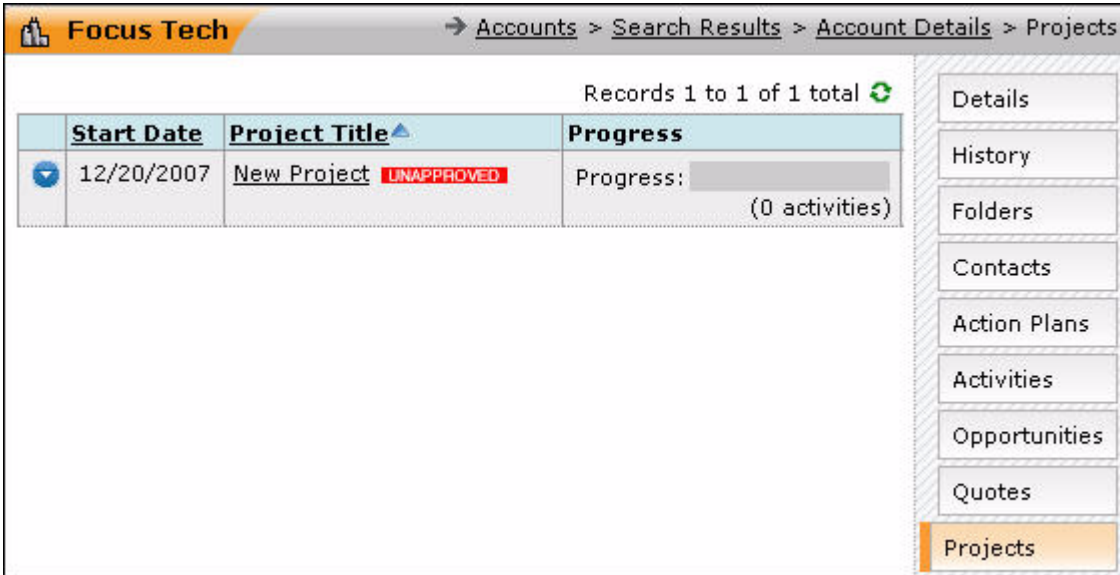


Figure 7.50 Projects List of an Account

## 7.15 Viewing Service Contracts

You can access the **Service Contracts** page by clicking the **Service Contracts** sub-tab on the **Account Details** page, as shown in [Figure 7.51](#).

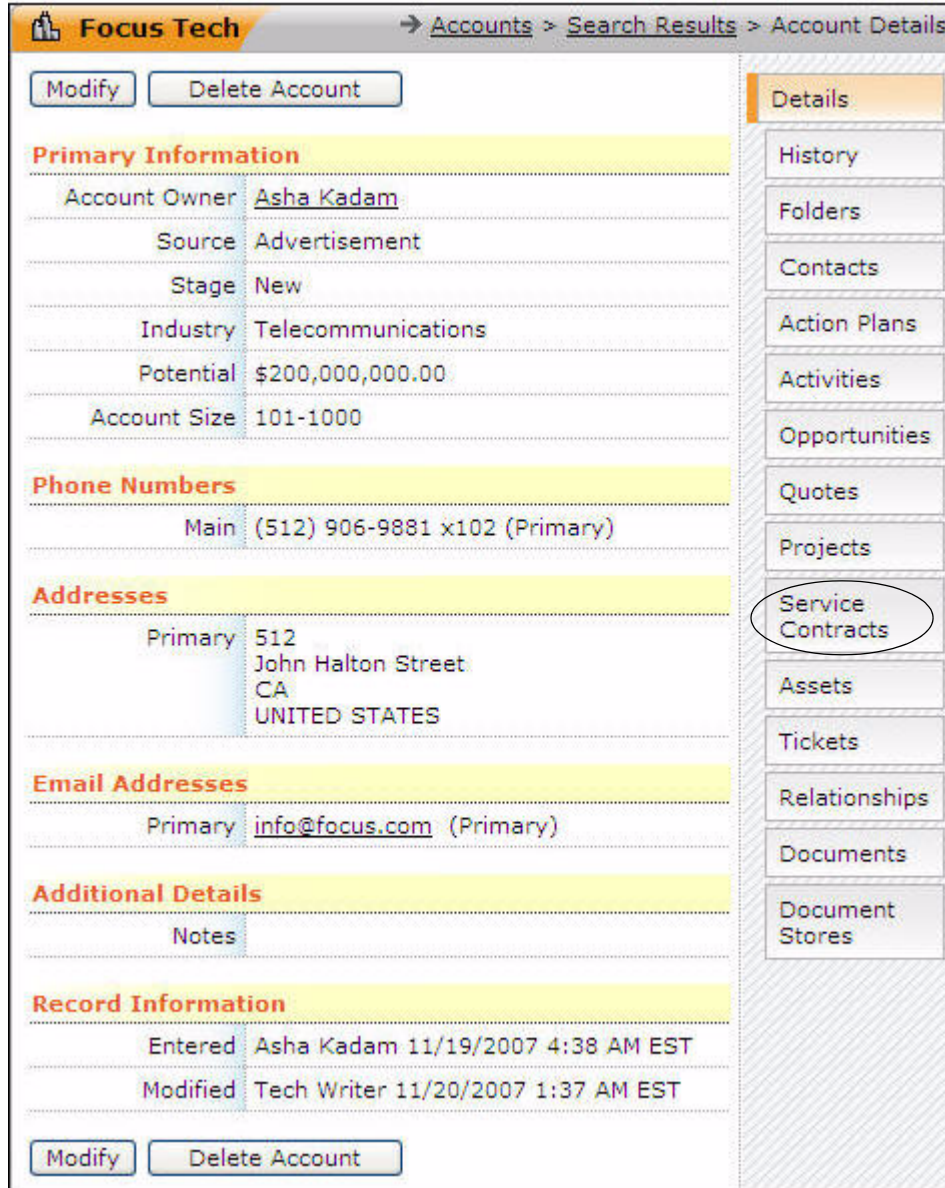



Figure 7.51 Accessing the Service Contracts Page

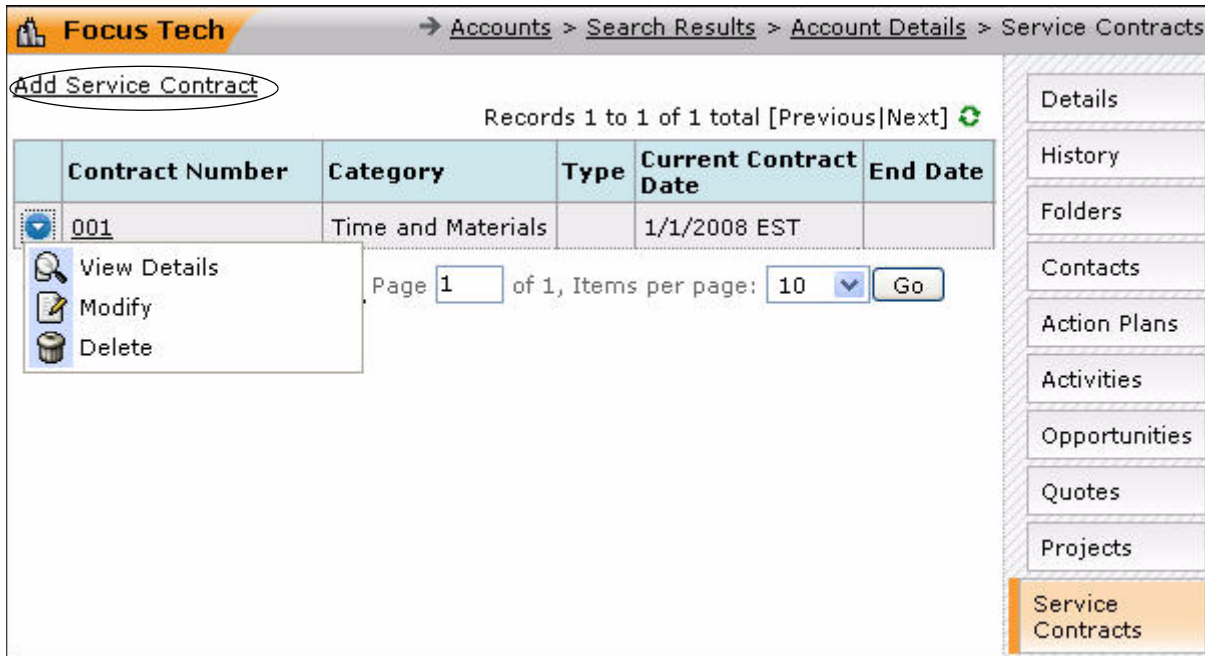
The **Service Contracts** feature is designed to fit the needs of organizations that provide long- or short-duration contracted services to their customers. For example, electrical maintenance contracts or computer hardware maintenance contracts are well-suited for this module.

Contracts are attached to accounts, and may also have assets attached to them. Assets are items under contract, and may include hardware of various sorts, or computer software, or even a swimming pool for a pool-maintenance business.

The **Service Contracts** page summarizes the contracts in place for the account in question, as shown in [Figure 7.52](#).

When you click , a context menu is displayed. This menu provides the following options:

- **View Details** - view details of an existing contract.
- **Modify** - modify details of an existing contract.
- **Delete** - delete an existing contract.



**Figure 7.52 The Service Contracts Page**

Click the **Add Service Contract** link to add a service contract. The **Add Service Contract** page is displayed, as shown in [Figure 7.53](#).

---

**Note:** A truncated image of the **Add Service Contract** page is displayed in [Figure 7.53](#).

---

You can enter the following details:

- Contract number and value of the contract
- Initial contract date
- Start and end dates of the contract
- Category and type of the contract
- Labor categories of work done in connection with this contract
- Customer contact for the contract
- Description and billing notes for the contract
- Hours off the contract, for an hourly-based contract and Service Level Agreement (SLA) information
- Service model options indicating the response time and details of telephonic, email, and onsite services



---

**Important:** All fields marked with a red asterisk are mandatory.

---

**Focus Tech** → Accounts > Account Details > Service Contracts > Add Service Contract

Save Cancel

### General Information

Service Contract Number	<input type="text"/> *
Contract Value	USD <input type="text" value="0"/>
Initial Contract Date	<input type="text"/> GMT-5 Eastern US <input type="button" value="v"/> *
Current Contract Date	<input type="text"/> GMT-5 Eastern US <input type="button" value="v"/>
Current End Date	<input type="text"/> GMT-5 Eastern US <input type="button" value="v"/>
Category	-- None -- <input type="button" value="v"/>
Type	-- None -- <input type="button" value="v"/>
Labor Categories	None Selected <input type="button" value="v"/> [Select]
Contact	-- None -- <input type="button" value="v"/>
Description	<input type="text"/>
Billing Notes	<input type="text"/>

### Block Hour Information

Total Hours Remaining	<input type="text"/> [Adjust] [Clear]
Adjustment Reason	No Adjustment
Adjustment Notes	No adjustment

Details  
History  
Folders  
Contacts  
Action Plans  
Activities  
Opportunities  
Quotes  
Projects  
**Service Contracts**  
Assets  
Tickets  
Relationships  
Documents  
Document Stores

Figure 7.53 The Add Service Contract Page

## 7.15.1 Using Contracts

Contracts can be used in several ways. They are referenced from the **Help Desk** module. When a customer has a problem and a help desk ticket is created, it is associated with a contract. **Contracts** provide the following information:

- How to charge the customer for a fix?
- How quickly must you respond?

If the customer has paid for a block of service time, then the time used to fix a problem gets automatically subtracted from the service hours left on the contract. A variety of SLA fields in the contract are used to escalate problems and deliver special alerts.

## 7.16 Assets

You can access the **Assets** page by clicking the **Assets** sub-tab on the **Account Details** page, as shown in [Figure 7.54](#).

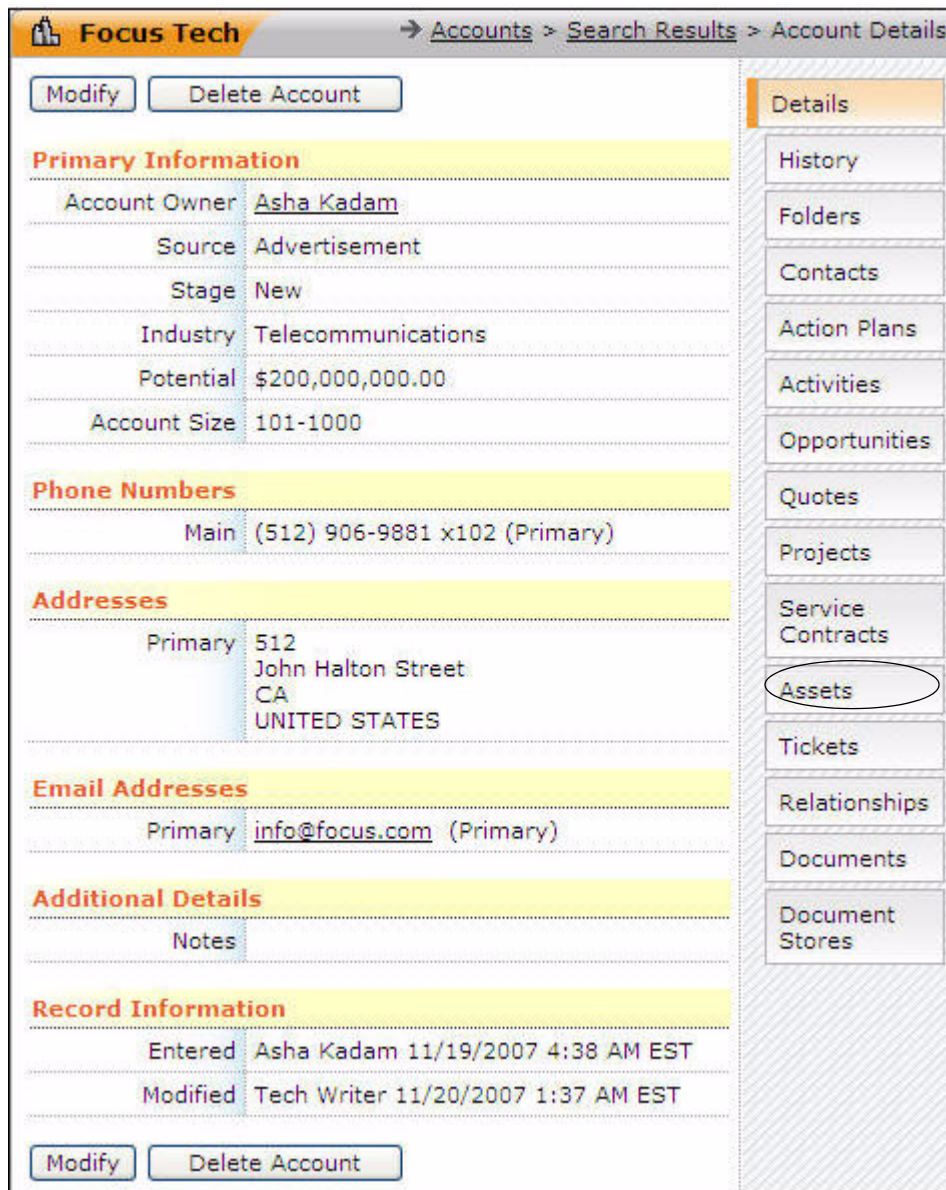
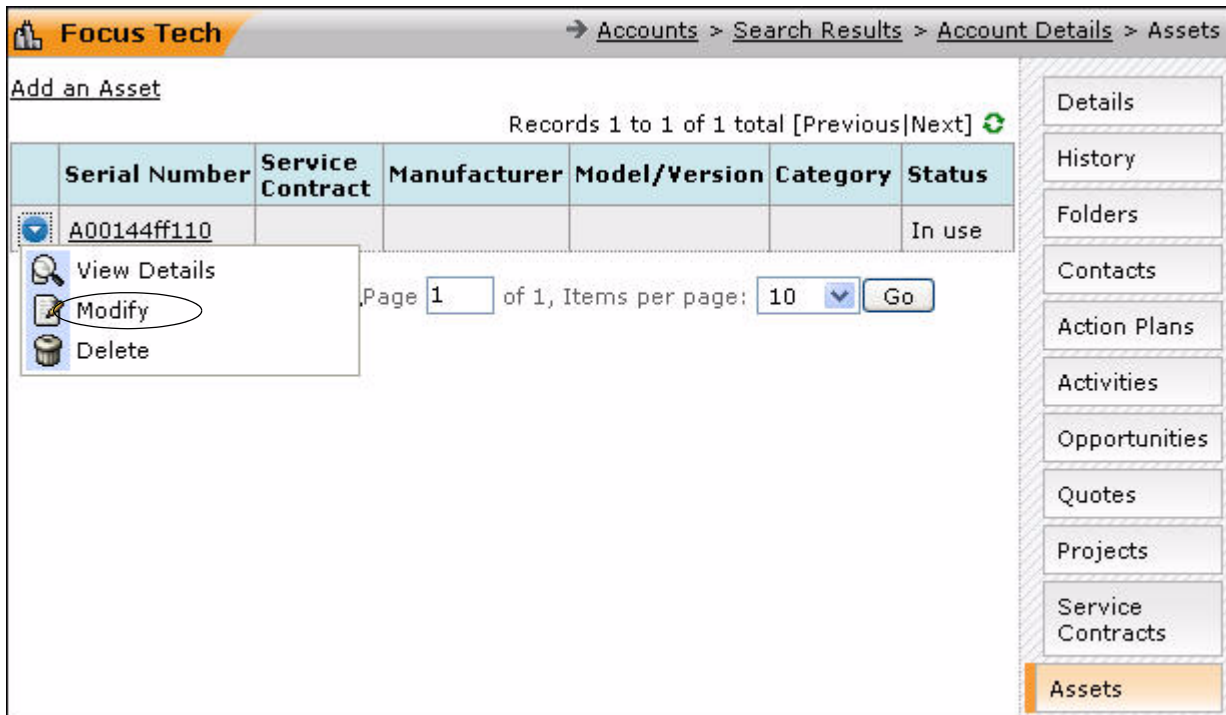


Figure 7.54 Accessing the Assets Page

Assets can be used with contracts, or independently. The **Assets** page is shown in [Figure 7.55](#).



**Figure 7.55 The Assets Page**

This page displays all the assets belonging to the particular account. The summary includes the following details:

- Serial number under which the asset is serviced
- Service contract details
- Manufacturer of the asset
- Model of the asset
- Category of the asset
- Status of the asset

Clicking  displays the context menu. To modify asset information, click **Modify** on this menu to view the **Asset Details** page, as shown in [Figure 7.55](#).

**Focus Tech** **A00144ff110** → Accounts > Account Details > Assets > Modify Asset

Details History Bill of Materials

Update Cancel

**Add an Asset**

Vendor -- None -- ▾

Manufacturer -- None -- ▾

Serial Number A00144ff110 \*

Model/Version

Description

Date Listed 12/24/2007 GMT-5 Eastern US \*

Location

Asset Tag

Status In use ▾

**Category**

Level 1 Undetermined ▾

Level 2 Undetermined ▾

Level 3 Undetermined ▾

**Service Contract**

Service Contract Number None Selected [Select] [Clear]

Contact -- None -- ▾

**Service Model Options**

Response Time -- Contract Default -- ▾

Telephone Service -- Contract Default -- ▾

Details

History

Folders

Contacts

Action Plans

Activities

Opportunities

Quotes

Projects

Service Contracts

**Assets**

Tickets

Relationships

Documents

Document Stores

Figure 7.56 Modify Asset Details Page

**Note:** Only a part of the entire screen is shown in [Figure 7.56](#).

This page contains the following fields:

- **Add an Asset** - This includes information regarding the following fields:
  - Vendor
  - Manufacturer
  - Serial Number
  - Model/version
  - Description
  - Date Listed
  - Location
  - Asset Tag
  - Status
- **Category** - a category associated with the asset.
- **Service Contract** - includes the service contract number and the contact information.
- **Service Model Options** - includes information on methods used to respond to a problem.
- **Warranty Information** - includes expiration date, inclusions, and exclusions.
- **Financial Information** - includes the purchase date, from whom the purchase has been made, and the cost of the asset.
- **Other Information** - includes any notes you want to enter.
- **List of Materials** - includes the list of materials to be selected.

### 7.16.1 Using Assets

Assets are used in service centers for documenting and resolving problems. For example, if you run an air conditioning company, you will want to track what equipment you installed for the customer and provide service for that equipment. Assets and contracts help you in doing these tasks.

Every time you service an asset, that service is completely documented and stored in a service history with the asset. You can view the history at any time by clicking the **History** button in the **Asset Details** page.

Assets and contracts can be used to manage your own IT infrastructure by creating an account for your own company, and then building your own contracts, SLAs, and assets. You can manage it all through your own inward-focused help desk.

## 7.17 Managing Tickets

You can access the **Tickets** page by clicking the **Tickets** sub-tab on the **Account Details** page, as shown in [Figure 7.57](#).

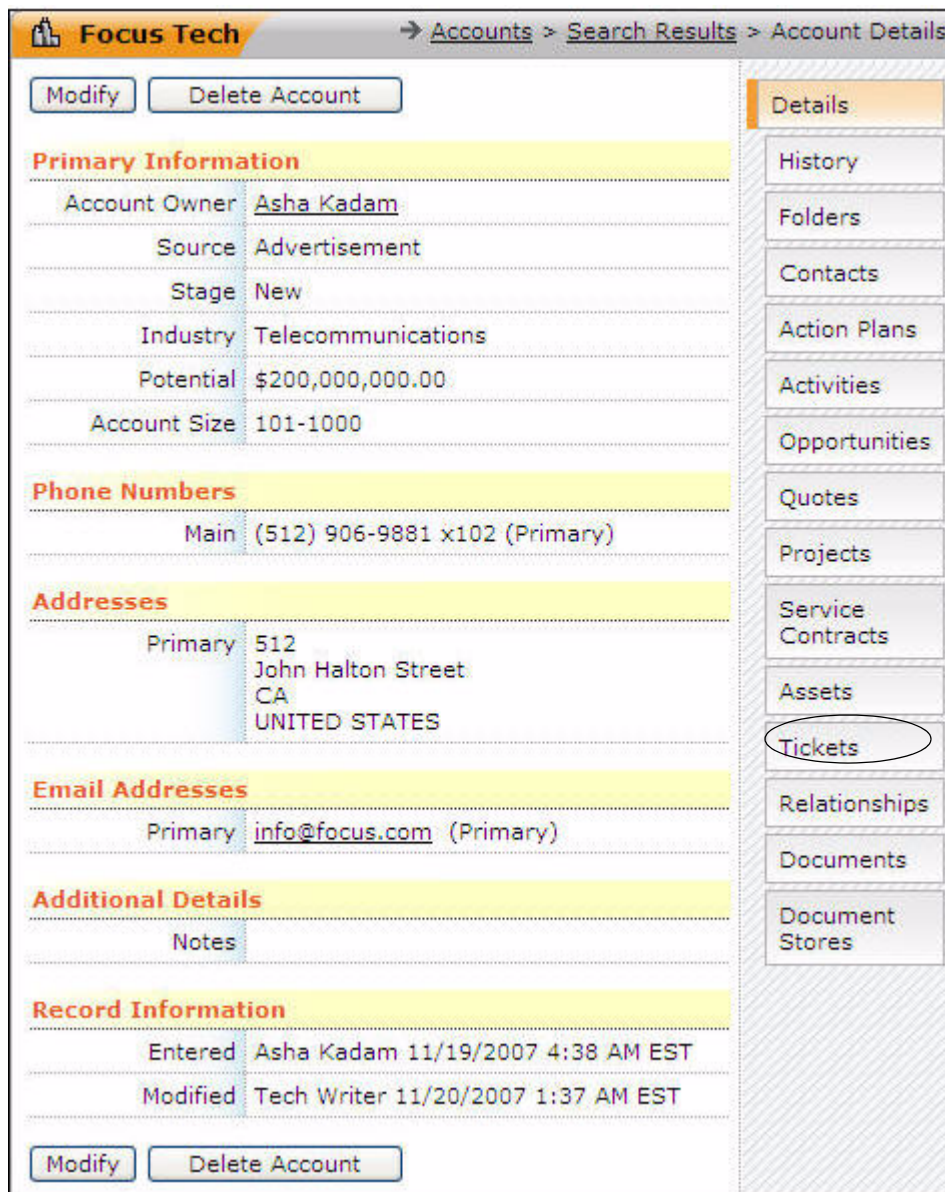


Figure 7.57 Accessing the Tickets Page

This page summarizes all help desk items related to the account. These items can be categorized as:

- Problem reports and resolutions
- Requests for information
- Other issues with the account

ConcourseSuite provides a full-featured **Help Desk** module. The **Tickets** page contains a complete subset of the whole **Help Desk** module, as applicable to a specific customer account. The **Tickets** page lists both the open and closed ticket items, as shown in [Figure 7.58](#).

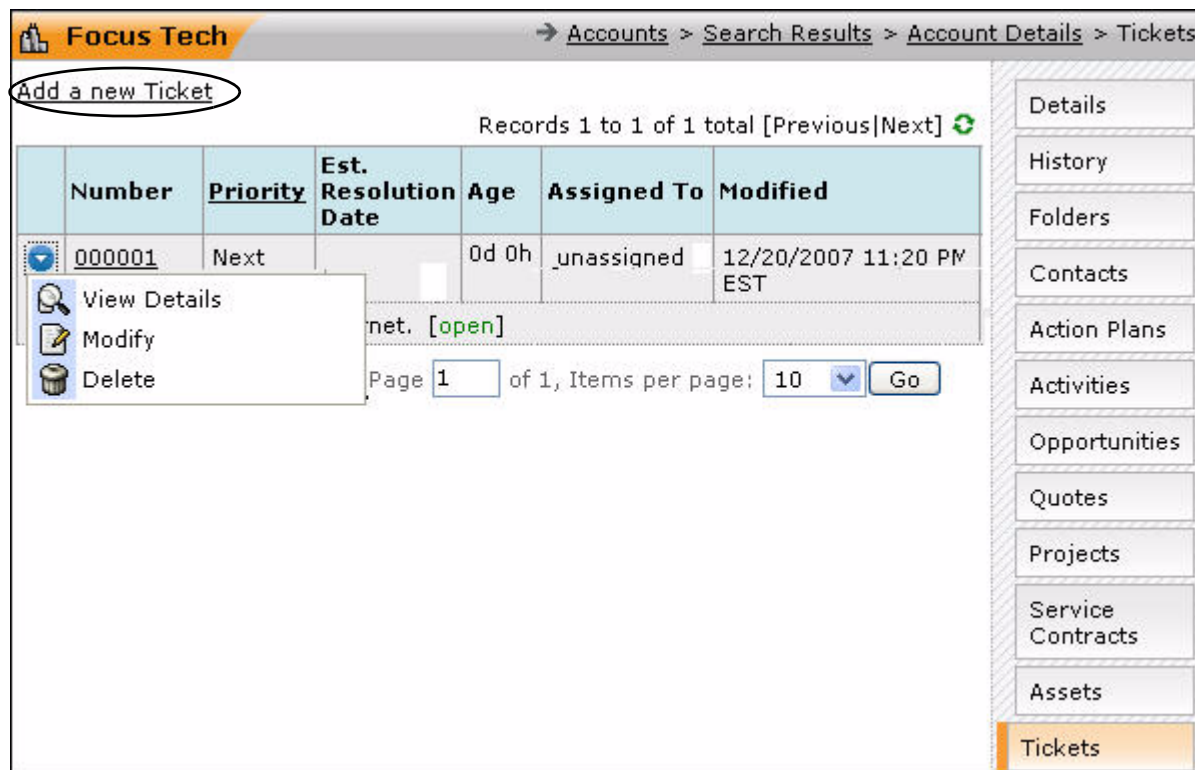



Figure 7.58 The Tickets Page

This page provides you with information on issues an account has now, and has had in the past. You can also view how responsive you have been to their problems or requests. This indicates the level of customer satisfaction with your products and services.

Clicking  displays a context menu. You can perform any one of the tasks listed below from the options on the context menu:

- View existing tickets
- Modify tickets
- Delete tickets

To add a ticket, click **Add a new Ticket** link, shown in [Figure 7.58](#).

To view an existing ticket, click the **Ticket Number** to display information regarding the ticket, and a number of sub-tabs for additional information.

You can assign a ticket to a department or a person for resolution by modifying it. You can enter ticket information in a flexible knowledge base for later search and retrieval. You can also describe the fix and close a ticket.

### 7.17.1 Managing Documents

Document management is a recurring feature in ConcourseSuite. This feature is found in the following modules:

- **Pipeline** module - You can store presentations and proposals here.
- **Accounts** module - You can store contracts and other legal documents here.



- **Projects** module - You can store a variety of project-oriented materials in this module.
  - **Tickets** - You can store service related information in this module.
- All documents are managed by the standard ConcourseSuite security and permissions system.

## 7.18 Relationships

You can access the **Relationship** page by clicking the **Relationships** sub-tab on the **Account Details** page, as shown in [Figure 7.59](#).

The screenshot shows the 'Focus Tech' account details page. The breadcrumb trail is 'Accounts > Search Results > Account Details'. At the top, there are 'Modify' and 'Delete Account' buttons. The main content area is divided into several sections:

- Primary Information:** Account Owner: Asha Kadam; Source: Advertisement; Stage: New; Industry: Telecommunications; Potential: \$200,000,000.00; Account Size: 101-1000.
- Phone Numbers:** Main: (512) 906-9881 x102 (Primary).
- Addresses:** Primary: 512 John Halton Street, CA, UNITED STATES.
- Email Addresses:** Primary: info@focus.com (Primary).
- Additional Details:** Notes.
- Record Information:** Entered: Asha Kadam 11/19/2007 4:38 AM EST; Modified: Tech Writer 11/20/2007 1:37 AM EST.

At the bottom, there are 'Modify' and 'Delete Account' buttons. On the right side, there is a vertical sidebar with various tabs: Details, History, Folders, Contacts, Action Plans, Activities, Opportunities, Quotes, Projects, Service Contracts, Assets, Tickets, Relationships (highlighted with a red circle), Documents, and Document Stores.

Figure 7.59 Accessing the Relationships Page

The **Relationships** feature enables you to trace relationship of the account with another via pre-defined parameters. Over a period of time, a business acquires customers who become frequent customers. Your business may offer some preferential treatment to such customers by using this feature. This feature will help you track a preferred account and its bearing on your other accounts.

To create a relationship between different accounts, click the **Add a Relationship**. Select from the options the one that best describes the relationship between the accounts, as shown in [Figure 7.60](#). Click **Create Relationship** to **Save** or **Cancel** to go back to the previous page.

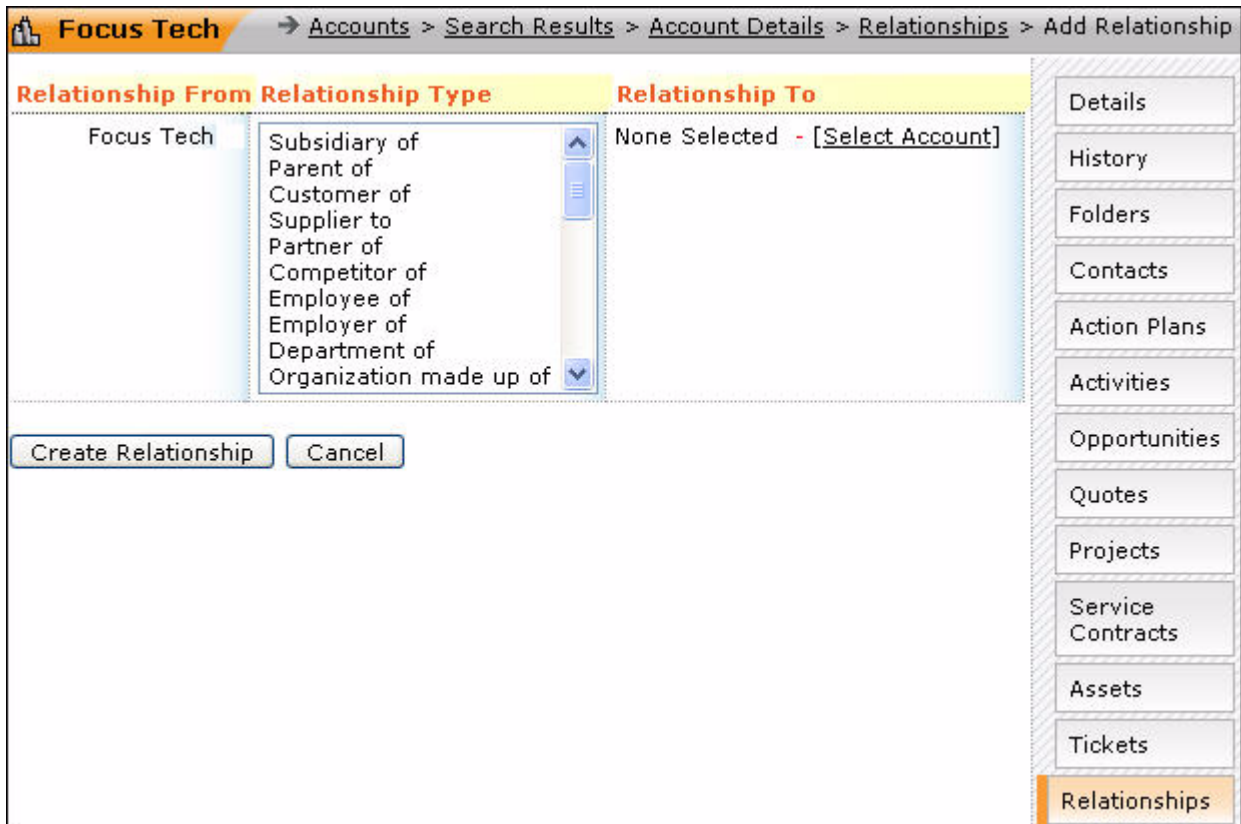


Figure 7.60 The Relationships Page

## 7.19 Document Stores

You can access the **Document Stores** page by clicking the **Document Stores** sub-tab on the **Account Details** page, as shown in [Figure 7.61](#).

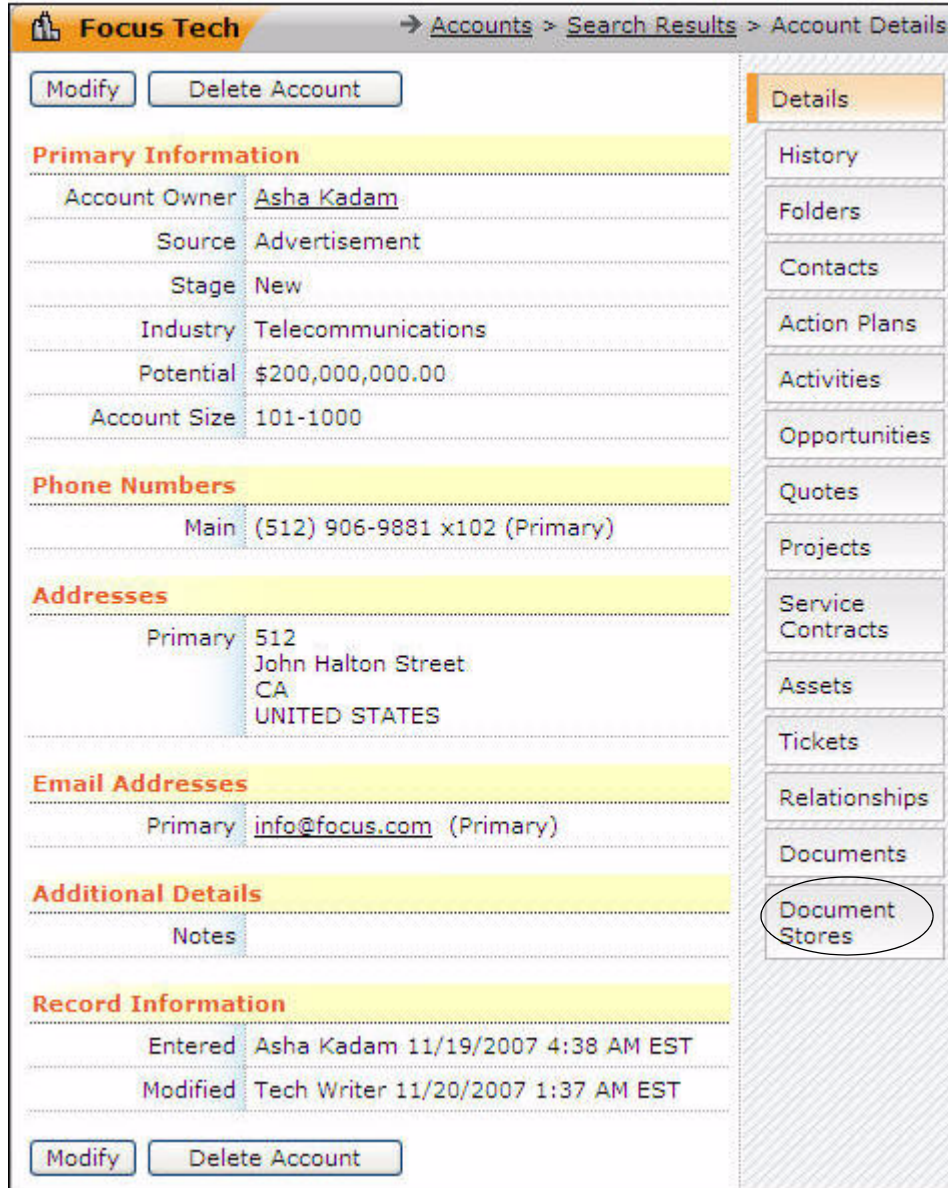


Figure 7.61 Accessing the Document Stores Page

The **Document Stores** page with the list of document stores, as shown in [Figure 7.62](#). For more details, refer to [Chapter 13, "Managing Documents"](#).

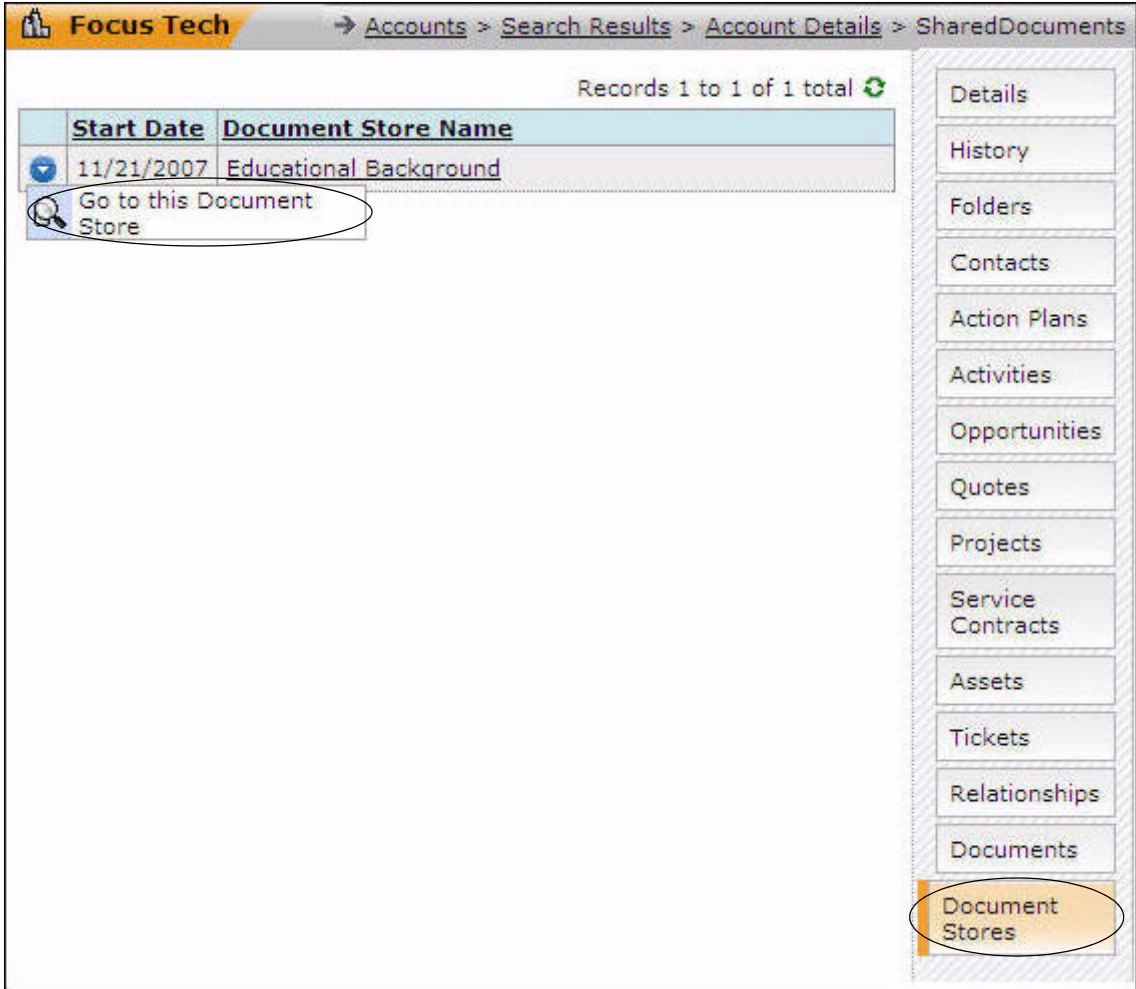



Figure 7.62 Accessing the Document Stores Page

When you click , you can go to the document store in the Documents module by clicking **Go to this Document Store**, as shown in [Figure 7.62](#).

## Managing Products

This chapter provides information about the **Products** module of ConcourseSuite. This module enables you to store information about products for future reference as well as use in generating quotes. This information includes product names, categories to which products belong, and product prices. ConcourseSuite provides a web-based interface to configure and manage your company's product catalog.

This chapter consists of the following sections:

- [Section 8.1, “How Does this Module Help You?”](#)
- [Section 8.2, “Searching for a Product”](#)
- [Section 8.3, “Viewing Products”](#)
- [Section 8.4, “Adding a Category”](#)
- [Section 8.5, “Adding a Product”](#)
- [Section 8.6, “Importing Products”](#)

### 8.1 How Does this Module Help You?

This module helps you to efficiently manage product-related information for your company. The **Products** module helps you manage the following tasks:

- Categorizing Products
- Adding New Products
- Managing Pricing Details
- Importing Products

### 8.2 Searching for a Product

When you click **Search** on the menu bar, the **Products Search** page is displayed, as shown in [Figure 8.1](#).

The screenshot shows a web form titled "Products" with a sub-section "Product Search". The form contains the following fields and controls:

- Keyword(s)**: A text input field.
- Product SKU**: A text input field.
- Product Category**: A dropdown menu currently set to "All", with "[Select]" and "[Clear]" links next to it.
- Price Range**: Two text input fields separated by the word "to".
- Date Added to Catalog**: A dropdown menu.
- Search** and **Reset**: Two buttons at the bottom of the form.

Figure 8.1 The Product Search Page

You can search for products by entering one or more details from the following:

- **Keyword(s)** - Enter keywords specific to the product you want to search.
- **Product SKU** - Specify the Stock Keeping Unit (SKU) of the products you want to search.
- **Product Category** - Specify the product category. Click **Select** to select a category and **Clear** to cancel the selected category.
- **Price Range** - Enter the price range of the product.
- **Date Added to Catalog** - Specify the time period when the product was added, for example, **Last Week**, **Last Month**, **Last 3 Months**, and **Last 6 Months**, as shown in [Figure 8.2](#).

This screenshot is identical to Figure 8.1, showing the "Product Search" form. The only difference is the breadcrumb trail at the top right, which reads "Products > Search".

Figure 8.2 Searching for a Product

## 8.3 Viewing Products

The **Products Editor** page can also be accessed by clicking the **View** link located on the menu bar, as shown in [Figure 8.3](#).

Products <span style="float: right;">→ <a href="#">Products</a> &gt; List of Products</span>						
<a href="#">Top Categories</a> <a href="#">New Category</a>   <a href="#">New Product</a>						
Records 1 to 2 of 2 total [Previous Next]						
	Name	SKU	Price	Start Date	Expiration Date	Enabled
	<a href="#">Product 1</a>					No
	<a href="#">TeleSmart</a>	445	\$450,000.00	12/18/2007		Yes
[Previous Next] Page <input type="text" value="1"/> of 1, Items per page: <input type="text" value="10"/> <input type="button" value="Go"/>						

**Figure 8.3 The Products Editor Page**

This page displays a list of categories and products of your company. Similar products have been grouped together into categories, such as Information Technology, as shown in [Figure 8.3](#).

For each product, you can view the following details:

- SKU
- Price
- Start Date
- Expiration Date
- Enabled

When you click beside a category name a context menu with the options to delete, rename, or move the category is displayed.

When you click beside a product name, a context menu with the following options is displayed, as shown in [Figure 8.4](#):

- **View Product** - view product details.
- **Modify Product** - modify the product details.
- **Clone Product** - copy common details of the product to create a new product.
- **Manage Category Associations** - For more details, refer to [Section 8.5.4, "Managing Category Association"](#).
- **Delete Product** - delete the product.

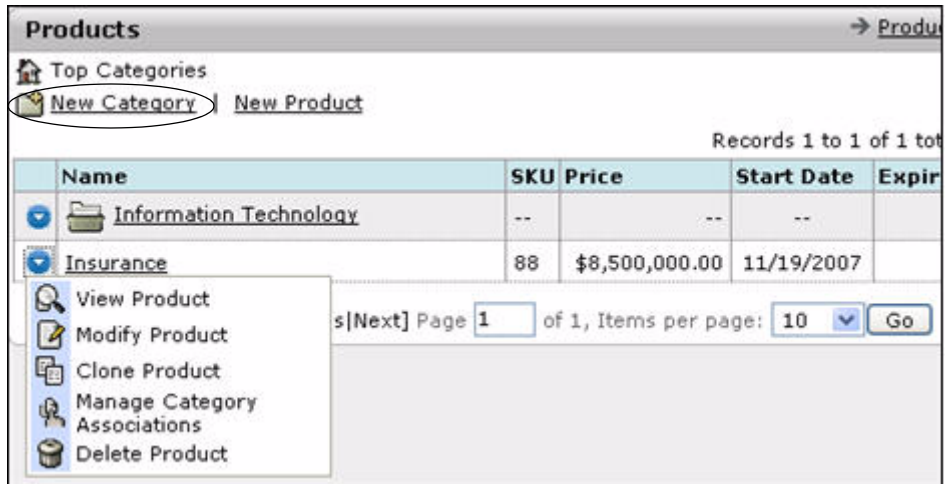


Figure 8.4 Context Menu on the Product Catalog Editor Page

## 8.4 Adding a Category

You can manage product classification by grouping similar products and assigning them to a category.

To create a new category, follow the steps listed below:

1. Select **New Category**, shown in [Figure 8.4](#).

The **Add Category** page is displayed, as shown in [Figure 8.5](#).

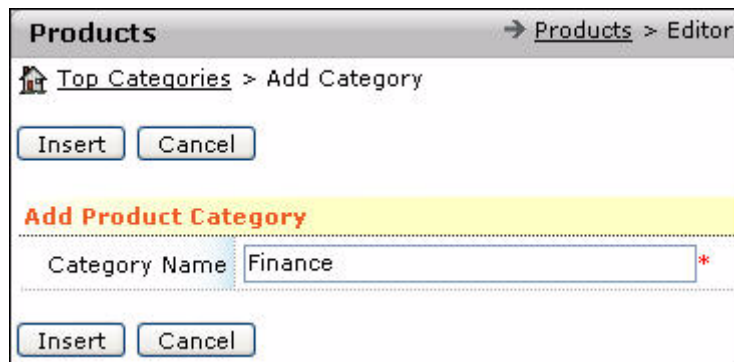


Figure 8.5 Adding a New Category

2. Enter the **Category Name** and click **Insert**, as shown in [Figure 8.5](#).

The **Products Editor** page showing the name of the created category is displayed, as shown in [Figure 8.6](#).



**Products** → [Products](#) > List of Products

Top Categories  
[New Category](#) | [New Product](#)

Records 1 to 2 of 2 total [Previous|Next] ↻

	Name	SKU	Price	Start Date	Expiration Date	Enabled
▼	Finance	--	--	--	--	--
▼	Product 1					No
▼	TeleSmart	445	\$450,000.00	12/18/2007		Yes

[Previous|Next] Page  of 1, Items per page:

Figure 8.6 Viewing the Created Category

You can view details of your top-selling products, which can be grouped under **Top Categories**.

## 8.5 Adding a Product

ConcourseSuite provides an option to add new products using the **New Product** option in the **Products** module.

You can add a new product in two ways:

- Select a category and add a product within this category
- Add a stand-alone product

To select a category and add a product:

1. Select the category name, as shown in [Figure 8.6](#).

The **Products Editor** page for the selected category is displayed, as shown in [Figure 8.7](#).

**Products** → [Products](#) > List of Products

Top Categories > Finance  
[New Category](#) | [New Product](#)

No records to display [Previous|Next] ↻

Name	SKU	Price	Start Date	Expiration Date	Enabled
No items to display.					

[Previous|Next] Page  of 1, Items per page:

Figure 8.7 Adding a Product Within a Category

---

**Note:** To create a stand-alone product, click **New Product**, shown in [Figure 8.6](#).

---

2. Click **New Product**, shown in [Figure 8.7](#).

The **Add Product** page is displayed, as shown in [Figure 8.8](#).

**Products** → [Products](#) > Editor

[Home](#) [Top Categories](#) > Add Product

**Product Details**

Product Name	<input type="text"/> *
Abbreviation	<input type="text"/>
SKU	<input type="text"/>
Product Type	-- None -- ▾
Product Ship Time	-- None -- ▾
Product Shipping	-- None -- ▾
Product Format	-- None -- ▾

**Availability**

Enabled	<input type="checkbox"/>
Start Date	<input type="text"/> <input type="button" value="Calendar"/>
Expiration Date	<input type="text"/> <input type="button" value="Calendar"/>

**Additional Details**

Short Description	<input type="text"/>
Long Description	<input type="text"/>
Special Notes	<input type="text"/>

**Other categories in which this product is included**

Categories	<input type="button" value="Choose"/>
------------	---------------------------------------

**Figure 8.8 Adding a New Product**

---

**Note:** The **Product Editor** page contains more details, and a truncated form of the page is shown in [Figure 8.8](#).

---

3. Enter the product related details and click **Insert**.

You can enter the following information:

- Product Name
- Abbreviation
- SKU
- Product Type
- Product Ship Time
- Product Shipping
- Product Format
- Start and expiration dates related to the availability of the product
- Description
- Categories
- Price

Entering all possible information helps you track products. If the number of Stock Keeping Units (SKUs) is large, tracking products with wrong or incomplete product details will be time-consuming.

The **Product Details** page is displayed, as shown in [Figure 8.9](#).

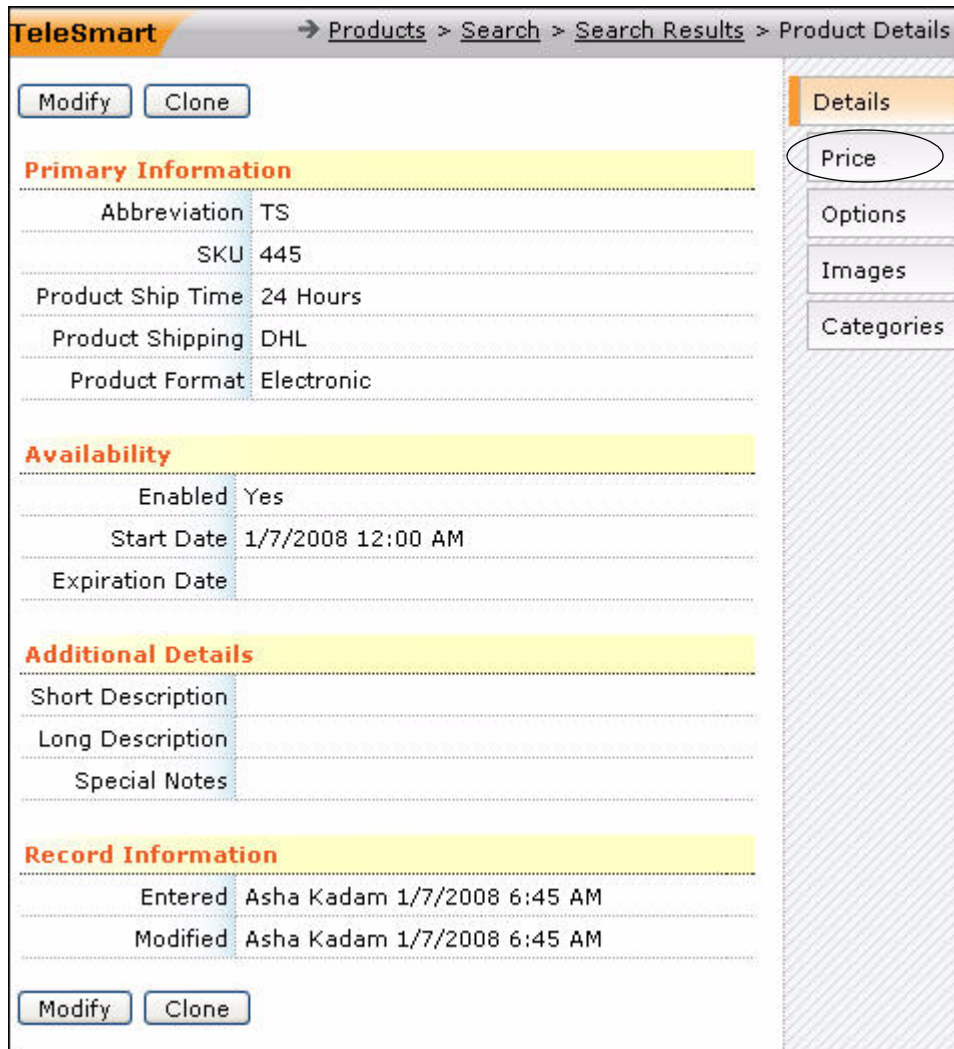


Figure 8.9 Viewing the Product Details

The **Product Details** page enables you to perform the following tasks:

- Modify the product details - using the **Modify** option.
- Duplicate the product details - using the **Clone** option.
- Delete the product details - using the **Delete** option.

## 8.5.1 Providing Pricing Details

ConcourseSuite enables you to store multiple dimensions of pricing information, including:

- MSRP
- Price
- Cost

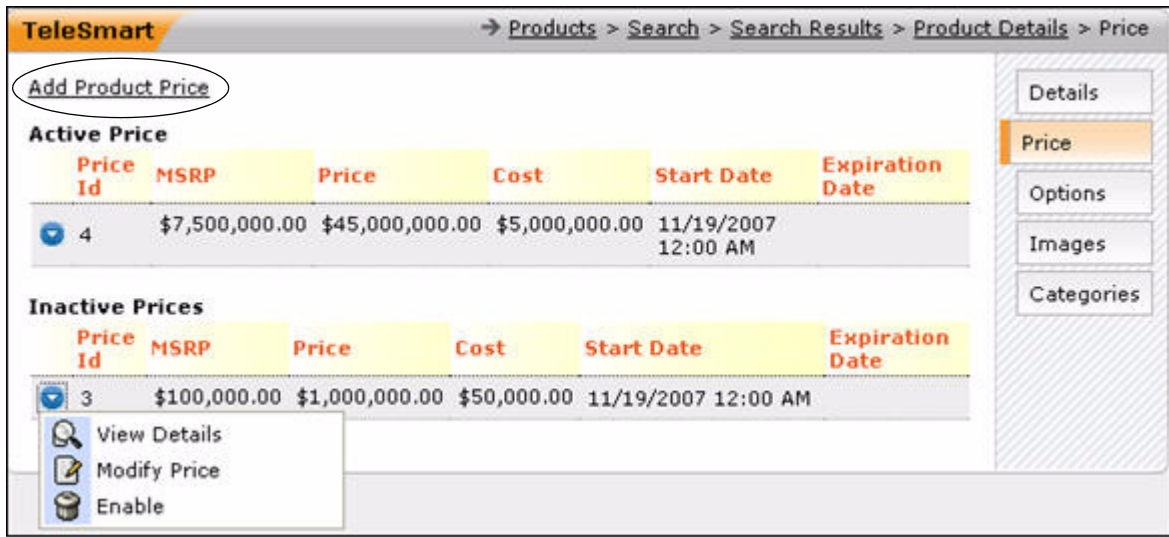


Figure 8.10 Accessing Product Price

Click the **Price** sub-tab on the **Product Details** page, shown in [Figure 8.9](#). The **Price** page with product price information is displayed, as shown in [Figure 8.10](#).

You can specify the pricing details by following the steps listed below:

1. Click the **Add Product Price** link, shown in [Figure 8.10](#).

The **Add Price** page is displayed, as shown in [Figure 8.11](#).

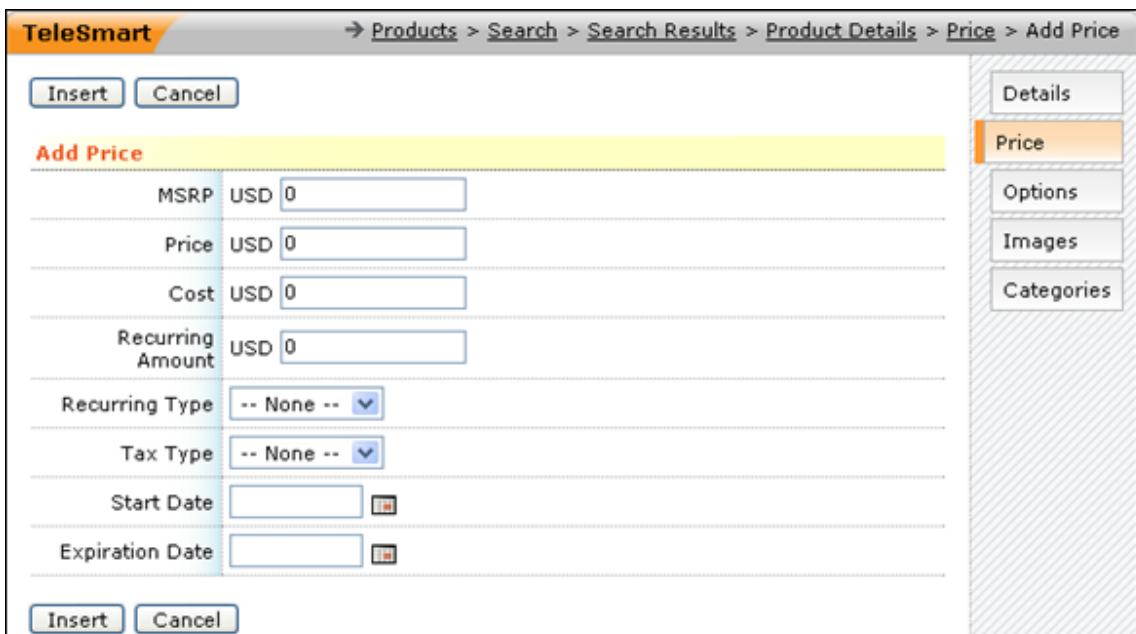


Figure 8.11 Adding Pricing Details

2. Enter all the pricing details for the product and click **Insert**.

The **Price Page** is displayed, as shown in [Figure 8.10](#).

You can fix multiple prices for a given product. Among these, one is fixed as the active price. This is the current price at which the product is sold. The remaining are inactive prices which are used for reference. A product can have an active price and one or more inactive prices.

You can set an inactive price as the active price, if required. For example, if there is a marked increase in demand for a product, you can activate an inactive higher price and disable the lower but currently active price.


To disable an active price and enable an inactive price:

1. Click  and select **Disable** from the context menu to deactivate the active price shown in [Figure 8.12](#).

The disabled price is set as an inactive price, as shown in [Figure 8.13](#).



Figure 8.12 Deactivating the Active Price

2. Click  for the inactive price that you wish to activate, and select **Enable** from the context menu to set the inactive price as the active price, as shown in [Figure 8.13](#).

The inactive price is set as an active price.



Figure 8.13 Activating an Inactive Price

## 8.5.2 Specifying Product Options

ConcourseSuite enables you to define extra options for your products. For example, if you sell computer hardware and are defining the pricing for a particular laptop model, you get the base configuration and price for this model. Customers can choose additional features or upgraded specifications at an extra price per feature. Your default configuration may be 1 GB of RAM on the laptop, but the customer can purchase the laptop with 2 GB of RAM, for an additional price. For this purpose, you can add an option for the laptop as Additional RAM. Another example is when the manufacturer normally offers a year's warranty on the laptop, but allows the warranty to be extended to 2 or 3 years, for an additional payment at the time of purchase.

ConcourseSuite provides you with different types of fields which you can use to define the options available with a given product. All of these result in an addition to the base price, of a value that you define, but they behave differently. The field types available are text, check box, number, and lookup list. Addition of options using each of these field types is described below.

### 8.5.2.1 Accessing the Options Page

Selecting the **Options** sub-tab on the **Product Details** page displays the **Options** page, as shown in [Figure 8.14](#).

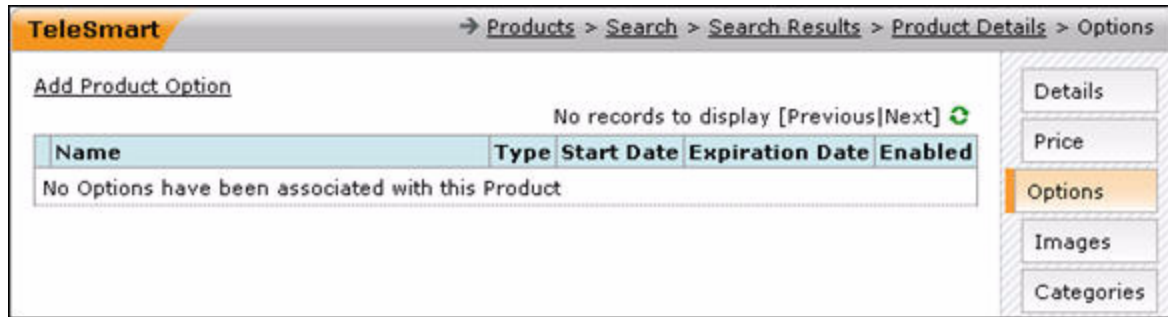


Figure 8.14 Viewing the Options Page

Clicking the **Add Product Option** link displays the **Add Option** page, as shown in [Figure 8.15](#).

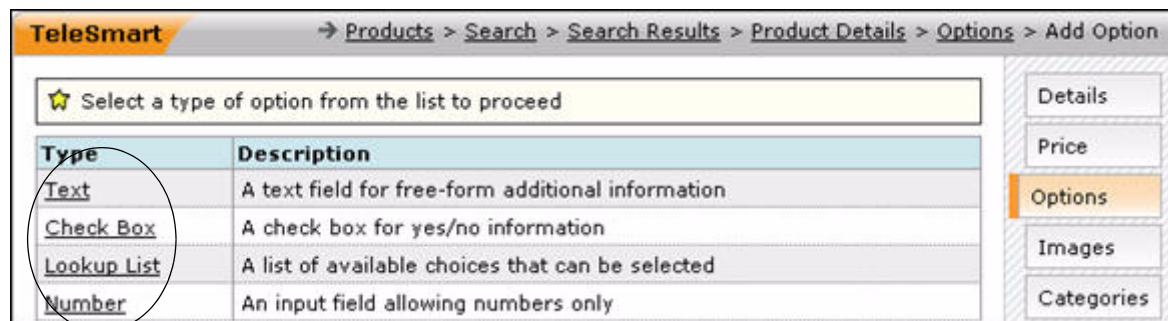


Figure 8.15 Choosing a Field Type for the New Option

The field types available for creating a new option, as shown in [Figure 8.15](#), are listed below:

- **Text** - This field type enables you to add a text option.  
End-users can enter text in this field
- **Check Box** - This field type enables you to add a check box option.  
End-users can select the check box to select **Yes**, or leave it blank for **No**.
- **Lookup Lists** - This field type enables you to add a lookup list option.  
End-users can select a specific option from the list.
- **Number** - This field type enables you to add a number option.  
End-users can enter a numeric value in this field.



TeleSmart → Products > Search > Search Results > Product Details > Options

Add Product Option

Records 1 to 4 of 4 total [Previous|Next] ↻

Name	Type	Start Date	Expiration Date	Enabled
Name	Text	11/19/2007		Yes
Balance Sheet Module	Check Box	11/19/2007		Yes
View Details	Lookup List	11/19/2007		Yes
Modify	Number	11/19/2007		Yes
Delete				

Details  
Price  
Options  
Images  
Categories

Figure 8.16 Product Options

For an existing product option, you can perform the following tasks, shown in Figure 8.16:

- View option details
- Modify option details
- Delete an option

Click the **Name** option and the properties are displayed, as shown in Figure 8.17. In this example, the field type of the option is text.

TeleSmart → Products > Search > Search Results > Product Details > Options > Add Option

Save Cancel

**Text Option Properties**

Label to display: Name \*

Minimum Chars Allowed: 1 \*

Maximum Chars Allowed: 255 \*

Default Text: TeleSmart Financial Advisor

**Option Price Adjustment**

Adjust base price based on number of characters: USD 3 base price + (number of characters X amount)

**Availability**

Enabled:

Start Date: 11/19/2007

Expiration Date:

Save Cancel

Details  
Price  
Options  
Images  
Categories

Figure 8.17 Option Details

Options have prices associated with them. The option price is generally determined by a specific formula that is specified by the configuration of the options. Options also have start and expiration dates, and can be enabled or disabled.

### 8.5.2.2 Adding a Text Option

The **Text** option configurator enables you to add options with text characteristics. For example, you can have a product that can be customized with engraving.

To add a product option of the text type:

1. Click the **Text** link, shown in [Figure 8.18](#).

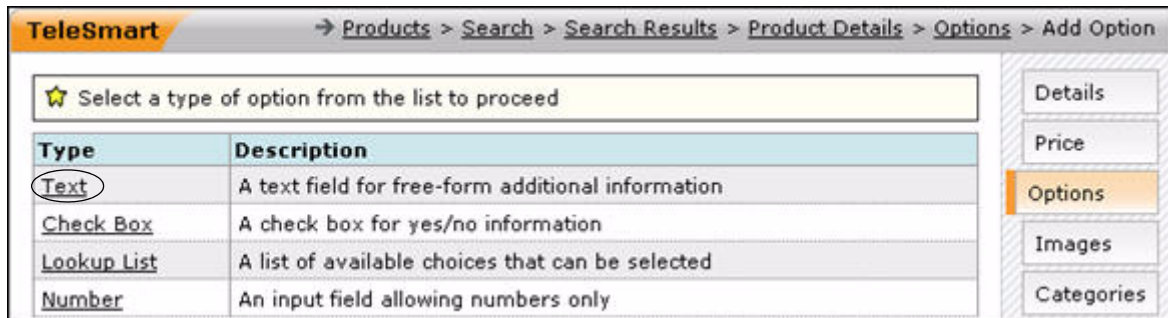


Figure 8.18 Selecting the Text Type of Options

The **Add Option** page is displayed, as shown in [Figure 8.19](#).

Figure 8.19 Adding Text Option Configurators

2. Enter the following details:
  - **Label to display** - as it will appear to end-users.
  - **Minimum Chars Allowed** - specifies the minimum number of characters end-users need to enter in the text box.
  - **Maximum Chars Allowed** - specifies the maximum number of characters end-users can enter in the text box.
  - **Default Text** - specifies the default contents of the text box.
  - **Option Price Adjustment** - specifies the adjusted price for the product based on the number of characters.
  - Start and Expiration date

---

**Note:** The final price of the product, based on what you have entered, is determined by the formula:

Product Price = Product Base Price + (Number of characters the user enters X price adjustment amount of the option)

---

3. Click **Save**.

The **Option Details** page showing the created text option is displayed, as shown in [Figure 8.20](#). This page also provides options to modify or delete the option.

<b>Name</b>	
Modify	Delete
<b>Option Properties</b>	
Label to display	Name
Minimum Chars Allowed	1
Maximum Chars Allowed	255
Default Text	TeleSmart Financial Advisor
<b>Option Price Adjustment</b>	
Adjust base price based on number of characters	\$3.00 base price + (number of characters X amount)
<b>Availability</b>	
Enabled	Yes
Start Date	11/19/2007 12:00 AM
Expiration Date	
Modify	Delete

Figure 8.20 Viewing the Option Details Page

### 8.5.2.3 Adding a Check Box Option

The **Check Box** option configurator enables you to add options with the check box characteristics. This type of option could be used for optional add-on components for a product. Continuing with the earlier example of the laptop, suppose that the base configuration for the laptop does not include an external mouse rather than the touch pad on the laptop. You could define a check box type option for a standard USB mouse which you sell, which will work with this laptop. While an order is being placed, if the customer requests the mouse option, the salesperson has to select this check box to add the cost of the mouse to the base price of the laptop.

To add a product option of type check box follow the steps listed below:

1. Click the **Check Box** link, shown in [Figure 8.21](#).

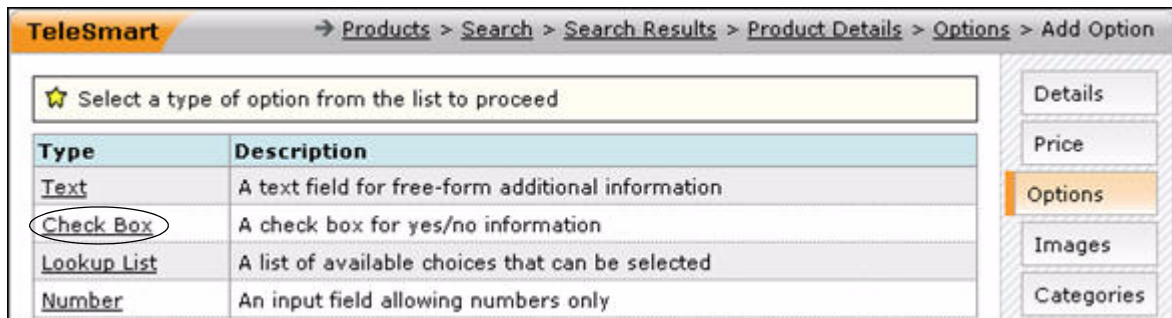


Figure 8.21 Selecting the Check Box Option

The Add Option page is displayed, as shown in Figure 8.22.

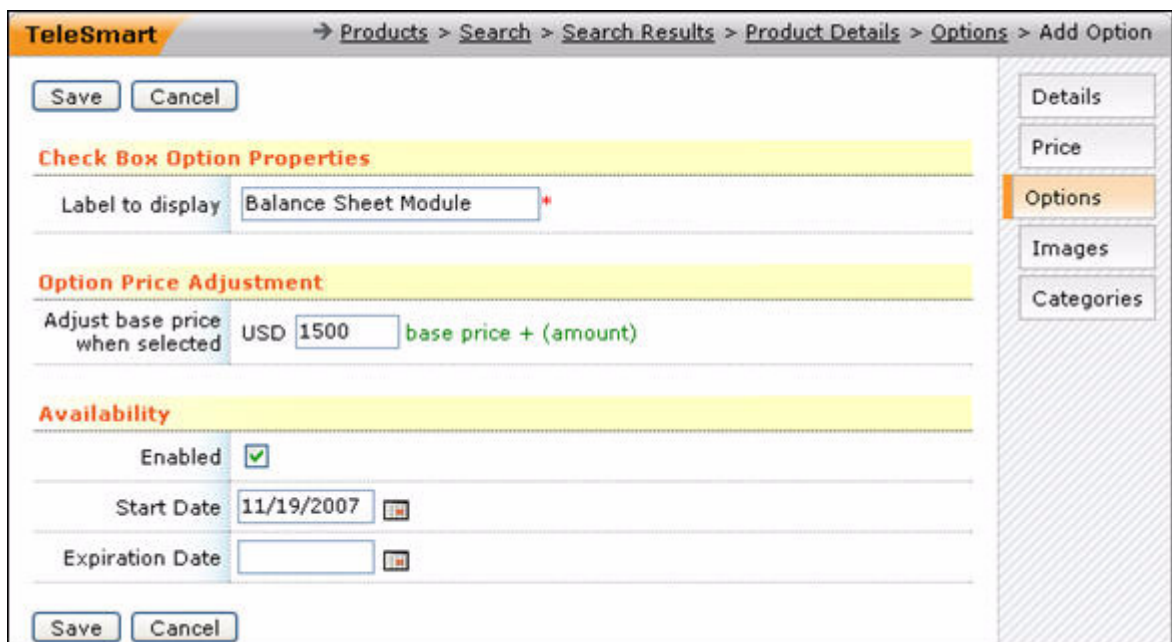


Figure 8.22 Adding a Check Box Configurator

2. Enter the following details:
  - **Label to display** - specifies the label of the check box.
  - **Start and Expiration date** - specifies the start and expiration dates.

---

**Note:** The final price of the product, based on what you have entered, is determined by the formula:

$$\text{Product Price} = \text{Product Base Price} + \text{check box price adjustment amount option}$$


---

3. Click **Save**.

The **Option Details** page showing the created check box option is displayed, as shown in [Figure 8.23](#). This page also provides options to modify or delete the option.

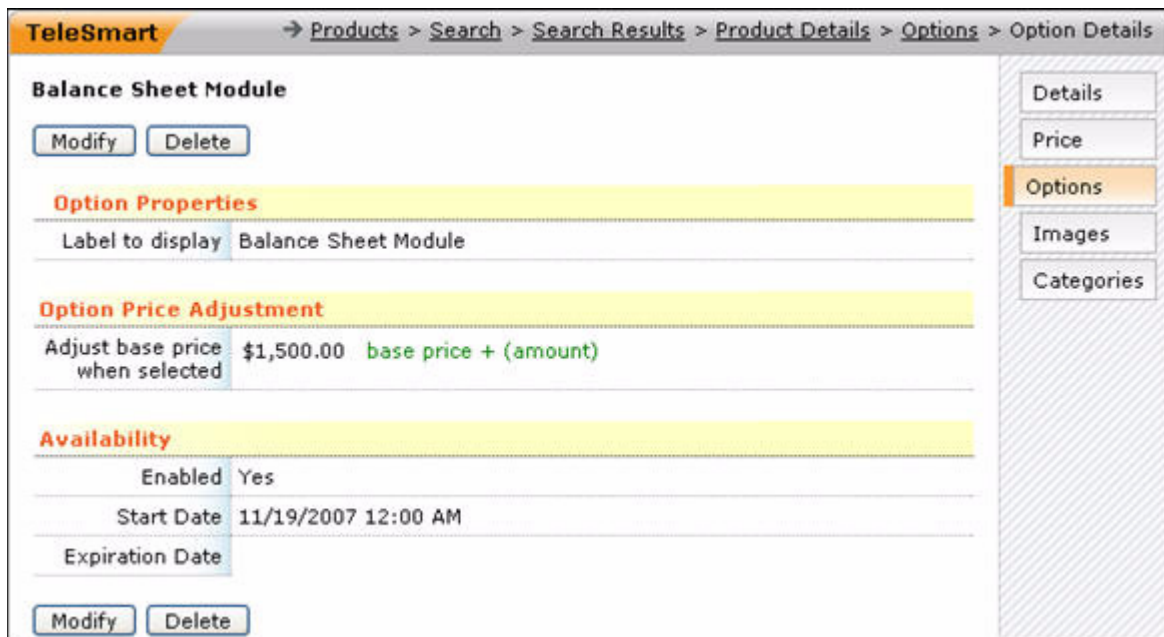


Figure 8.23 Viewing the Option Details Page of Check Box Option Type

### 8.5.2.4 Adding a Lookup List Configurator

The **Lookup List** option configurator enables you to add options that have a list of items out of which one may be chosen. Each item has a different price associated with it. Suppose you offer additional RAM pre-installed on the laptop we have been using as an example so far. You have three choices to offer to the customer: 1 GB, 2 GB, or 3 GB extra (the laptop comes with 1 GB of RAM in its base configuration, and the maximum memory it can take is 4 GB). You can create a lookup list type of option for this scenario, listing the three RAM sizes, and the corresponding prices.

To add an option of this type:

1. Click the **Lookup List** link, shown in [Figure 8.24](#).

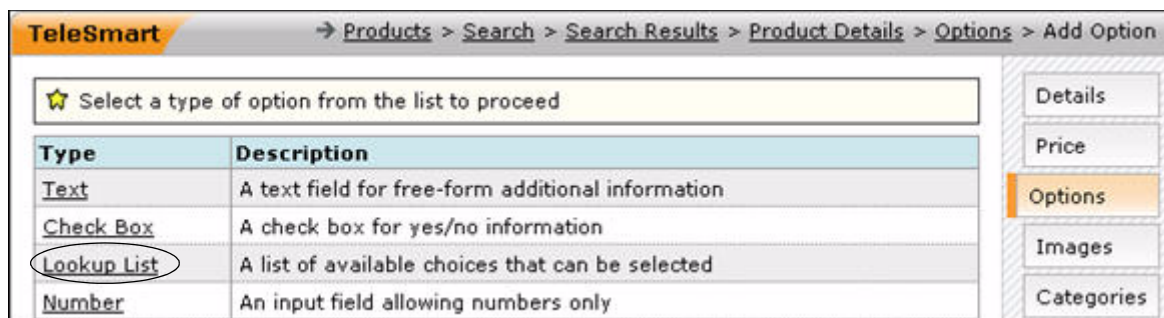


Figure 8.24 Selecting the Lookup List Option

The **Add Option** page is displayed, as shown in [Figure 8.25](#).

Item	Description	Option Price Adjustment	Enabled
1.	1 GB RAM	USD 100	<input type="checkbox"/>
2.	2 GB RAM	USD 175	<input type="checkbox"/>
3.	3 GB RAM	USD 225	<input type="checkbox"/>
4.		USD 0	<input type="checkbox"/>
5.		USD 0	<input type="checkbox"/>

**Figure 8.25 Adding a Lookup List Option**

2. Enter the following details:
  - **Label to display** - displays the label for the lookup list.
  - **Lookup List Items** - the items that appear in the list, and the additional price associated with each item.

If you need to add more than five items, click **More Items** to display five more list items. You can add any number of items for display.

---

**Note:** The final price of the product is determined by the formula:

$$\text{Product Price} = \text{Product Base Price} + \text{price adjustment amount of the selection}$$

3. Click **Save**.

The **Option Details** page showing the created lookup list option is displayed, as shown in [Figure 8.26](#). This page also provides options to modify or delete the option.

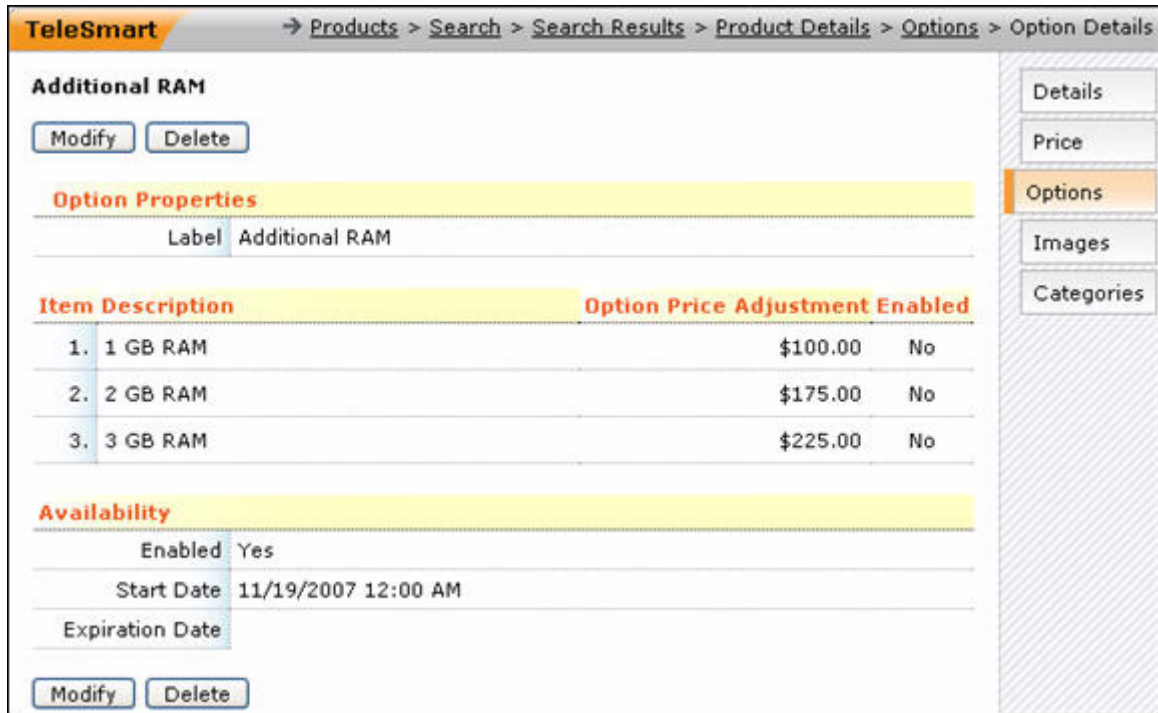


Figure 8.26 Viewing Lookup List Type of Option

### 8.5.2.5 Adding Number Type Configurator

The **Number** option configurator enables you to add numerical value options. For example, suppose the laptop you are selling has one year warranty in its base configuration, but the customer can purchase additional warranty years at a fixed amount per year, up to a maximum of five years. In such a case, you can create a number option with a minimum value of zero and a maximum value of five, and assign an amount for each year of additional warranty. When taking an order, a salesperson enters zero or more for this option, and the corresponding extra price is added to the price of the laptop.

To add an option of this type:

1. Click the **Number** link, shown in [Figure 8.27](#).

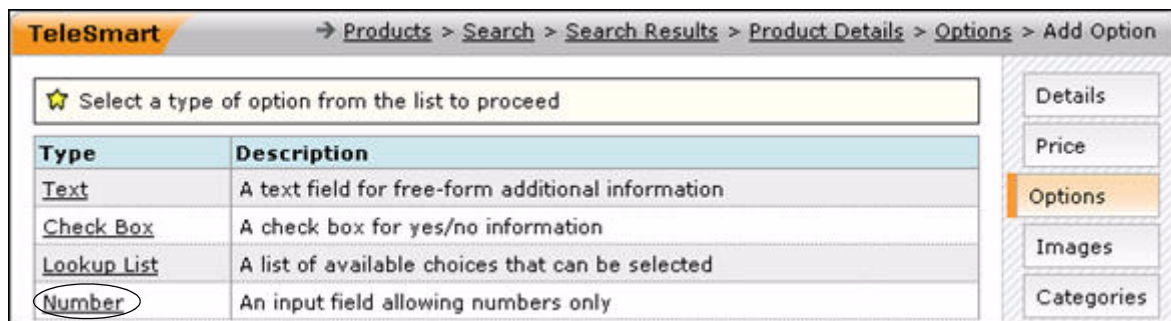


Figure 8.27 Selecting the Number Option

The **Add Option** page is displayed, as shown in [Figure 8.28](#).



TeleSmart → Products > Search > Search Results > Product Details > Options > Add Option

Save Cancel

**Number Option Properties**

Label to display: Quantity \*

Minimum Number Allowed: 1

Maximum Number Allowed:

Default Value:

Allow Fractions?:

**Option Price Adjustment**

Adjust base price based on number specified: USD 1500      base price + (number specified X amount)

**Availability**

Enabled:

Start Date: 11/19/2007

Expiration Date:

Save Cancel

Details  
Price  
Options  
Images  
Categories

Figure 8.28 Adding a Number Option Configurator

2. Enter the following details:
  - **Minimum Number Allowed** - specifies the minimum number the end-user can enter in the text box.
  - **Maximum Number Allowed** - specifies the maximum number the end-user can enter in the text box.
  - **Default Value** - displays the default value displayed in the text box for this option.
  - **Allow Fractions** - specifies that you can enter fractional values with a decimal.

---

**Note:** The final price of the product, based on what you have entered, is determined by the formula:

$$\text{Product Price} = \text{Product Base Price} + (\text{number specified} \times \text{price adjustment amount})$$


---

3. Click **Save**.

The **Option Details** page showing the number type option is displayed, as shown in [Figure 8.29](#). This page also provides options to modify or delete the option.

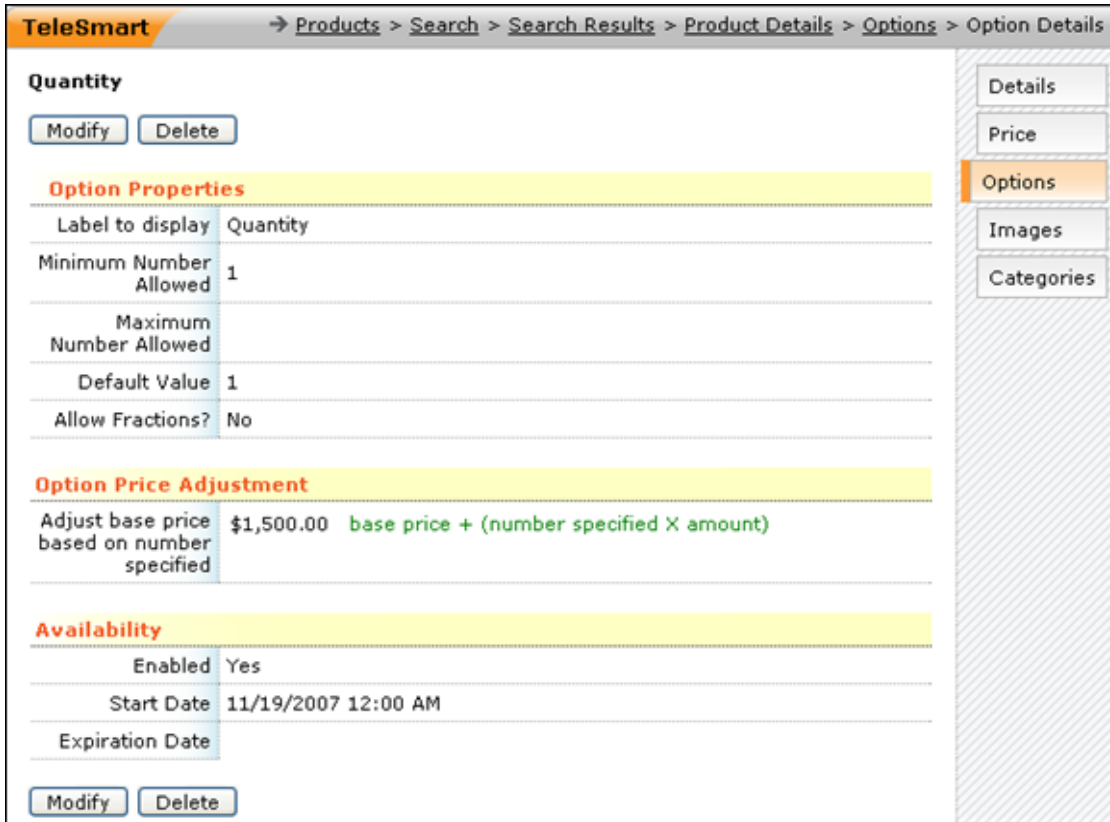


Figure 8.29 Viewing Option Details of Number Type

### 8.5.3 Adding Product Images

ConcourseSuite provides an option to upload images related to the product. You can upload the **Thumbnail Image**, **Small Image**, and **Large Image** for the product.

To upload images:

1. Click the **Images** sub-tab on the **Product Details** page, shown in [Figure 8.30](#).  
The **Images** page is displayed, as shown in [Figure 8.31](#).

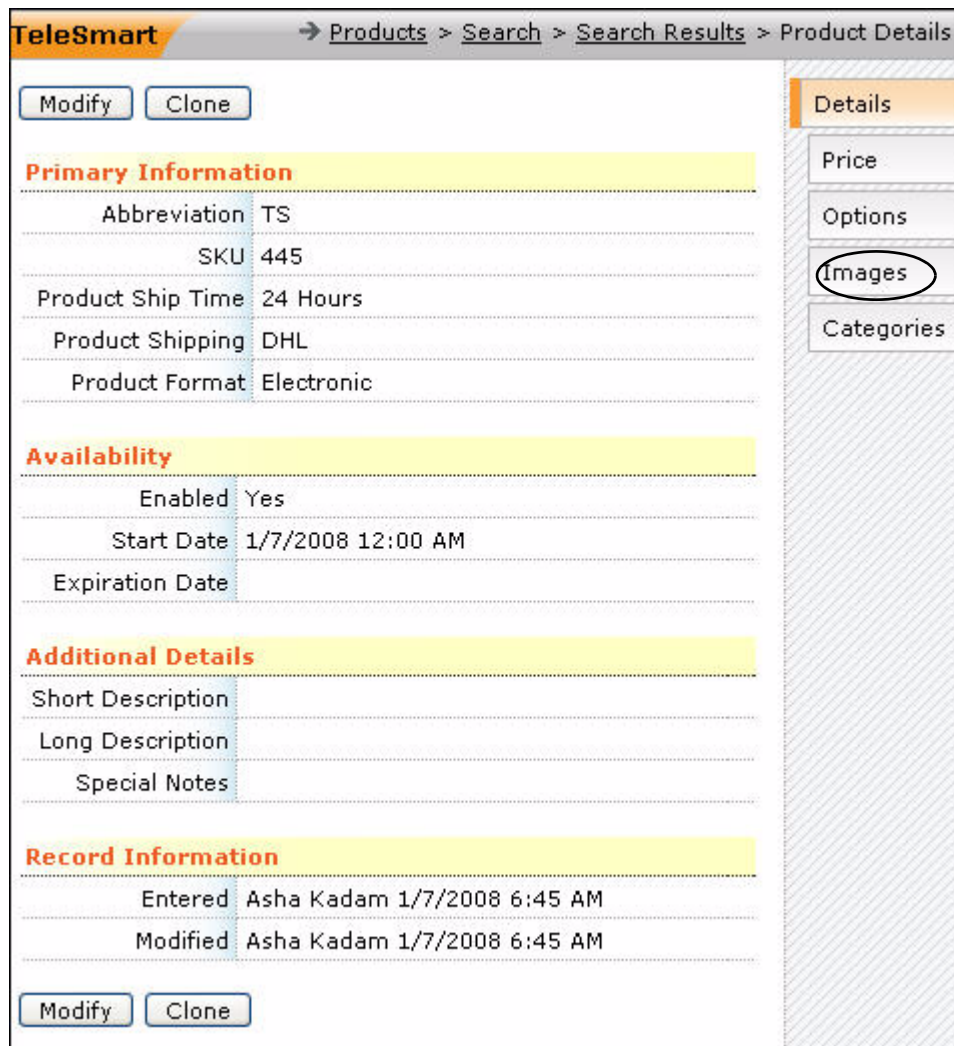


Figure 8.30 Selecting the Images Option

2. To upload a thumbnail image, click the **Upload** link, shown in [Figure 8.31](#). The page to upload images is displayed, as shown in [Figure 8.32](#).



Figure 8.31 Viewing the Images Page

- Click **Browse**, shown in [Figure 8.32](#). Select the image to be uploaded, and click **Open**. The name of the selected image is displayed in the text box beside **Browse**. Click **Upload File**, shown in [Figure 8.33](#).

The details of the uploaded image are displayed, as shown [Figure 8.34](#).

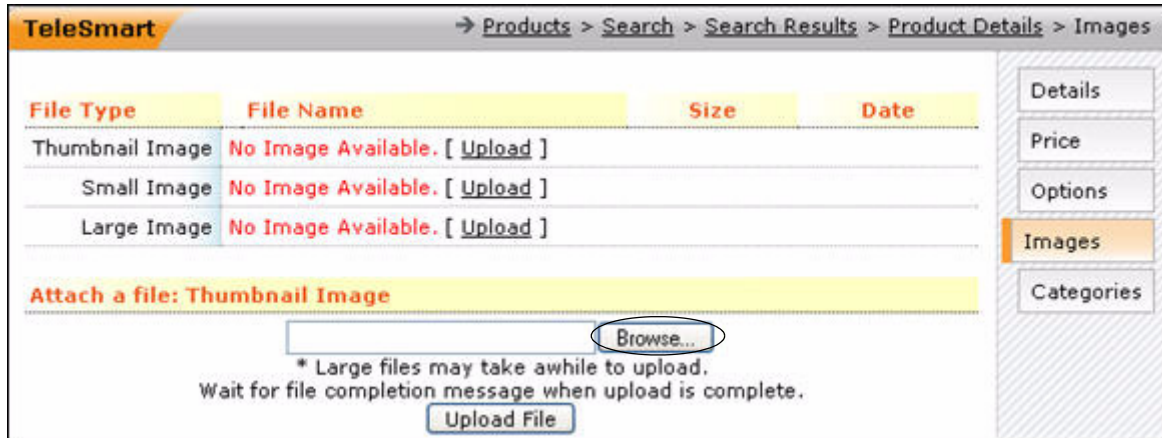


Figure 8.32 Selecting an Image to Upload

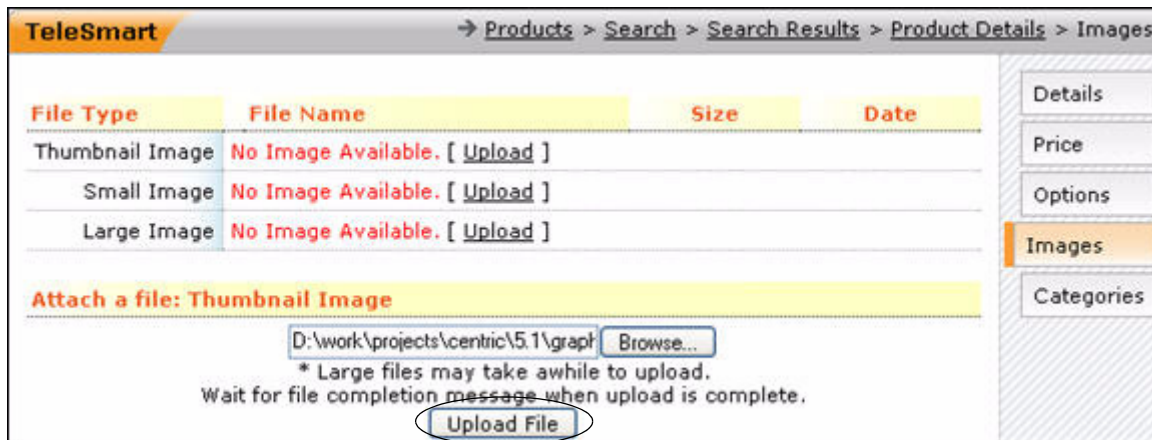


Figure 8.33 Uploading an Image

You can also upload small and large images by following the same method.

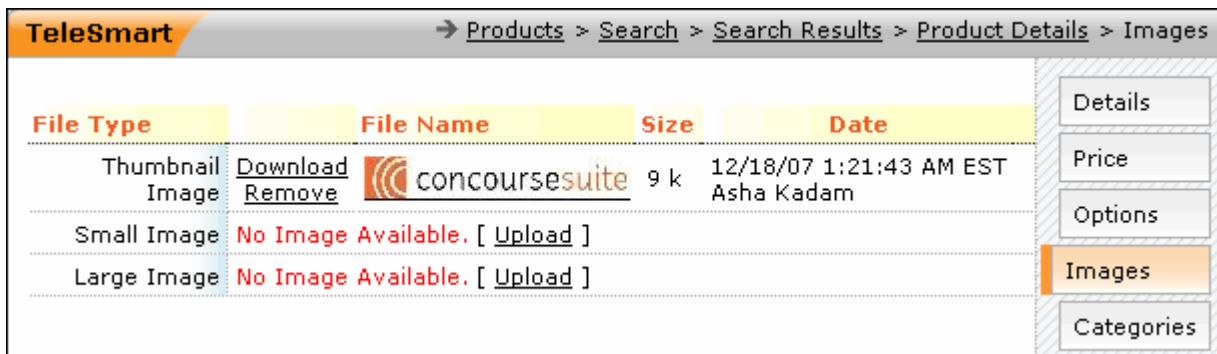


Figure 8.34 Viewing the Image Details

## 8.5.4 Managing Category Association

You can use the **Categories** sub-tab to re-categorize products after having entered them into the products catalog. Clicking the **Categories** sub-tab on the **Product Details** page displays the **Categories** page, as shown in [Figure 8.35](#).

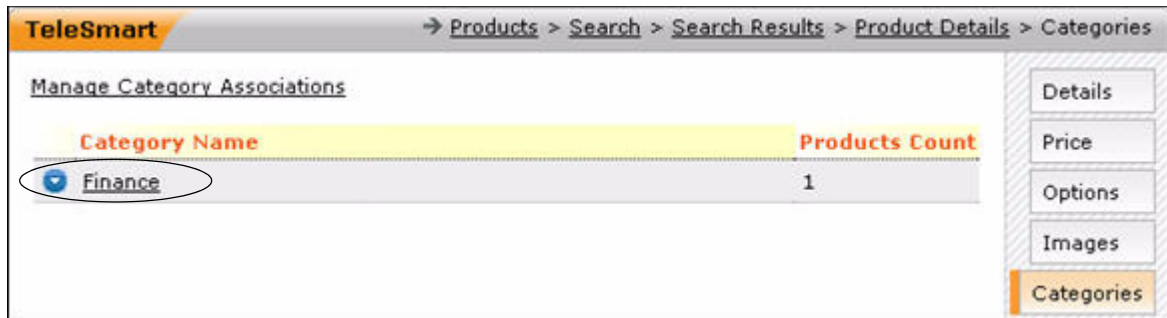


Figure 8.35 Categorizing Products

This page enables you to manage category associations. To assign a category to a product:

1. Click the **Manage Category Association** link. A pop-up window is displayed, as shown in [Figure 8.36](#).

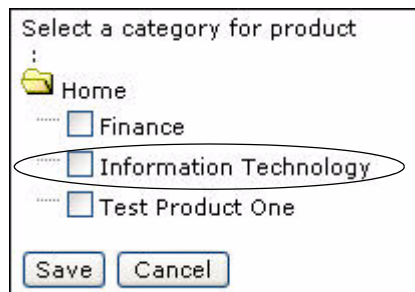


Figure 8.36 Selecting the Category

2. Assign a category to the product, as shown in [Figure 8.36](#) and click **Save**.

The **Categories** page with the assigned category is displayed, as shown in [Figure 8.37](#).

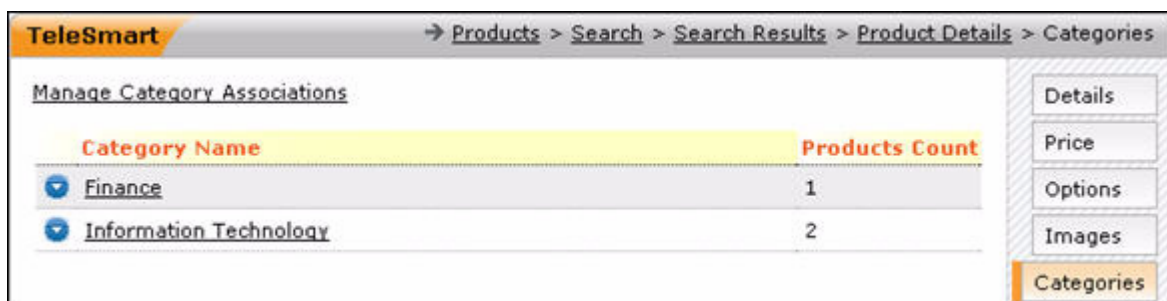


Figure 8.37 Viewing the Categories Page

## 8.6 Importing Products

ConcourseSuite supports importing of products in a group to form a product catalog, as shown in [Figure 8.38](#). This product catalog can be displayed on your website or used to create quotes and attach to an account.

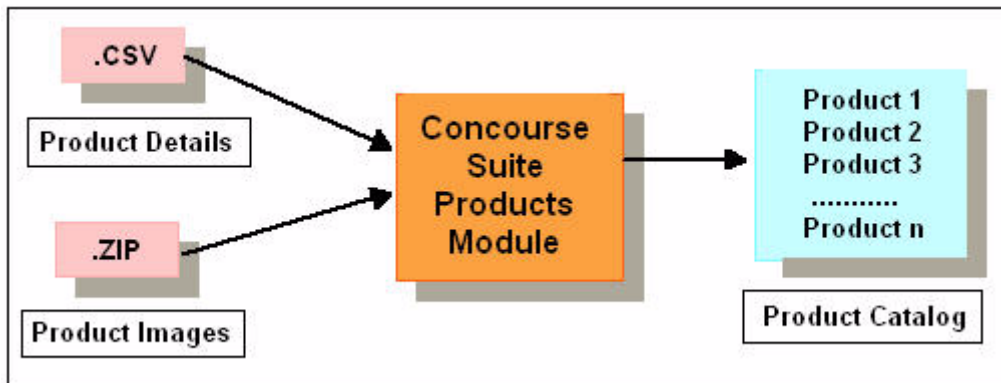


Figure 8.38 The Product Importing Process

The product import process requires the following two inputs:

- A Comma Separated Value (.CSV) file with a minimum of the following fields:
  - **Product Name** - to store the product name.
  - **Product Category** - to store product category.
  - **Short Description** - to store a short description of the product.
  - **Long Description** - to store a long description of the product.
  - **Price** - to store price description of the product.
  - **Small Image** - to store the name of the small image of the product.
  - **Large Image** - to store the name of the large image of the product.
  - **Product Code** - to store the product code.
- A .ZIP file containing all the image files specified in the .CSV file.

Each row in the .CSV file corresponds to a unique product record imported into ConcourseSuite. You can assign more than one category to a product.

---

**Note:** While creating the .CSV file, you can use a category name, which does not exist in ConcourseSuite. A category with the category name specified in the .CSV file is then created.

---

To import the product details and the product images:

1. Click **Import** on the **Products** menu bar.

The **View Imports** page is displayed, as shown in [Figure 8.39](#).

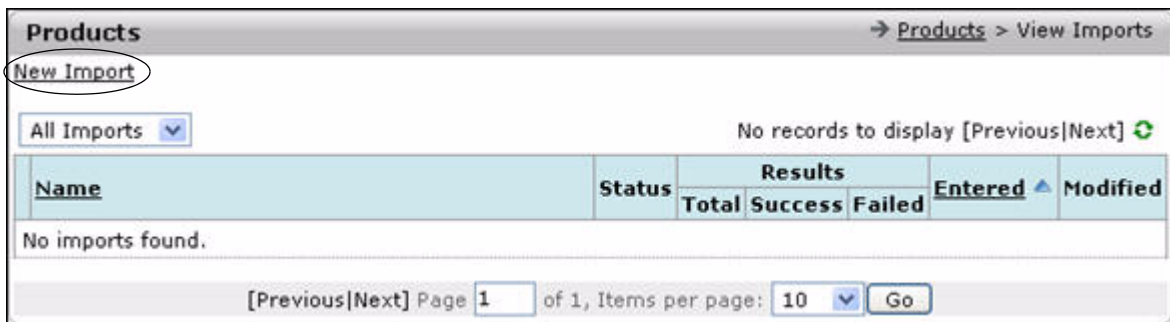


Figure 8.39 Accessing the View Imports Page

2. Click the **New Import** link shown in [Figure 8.39](#).  
The **New Import** page is displayed, as shown in [Figure 8.40](#).

Figure 8.40 Viewing the New Import Page

3. Enter the **Name**, **Description**, and **Comments**.
4. Click **Browse** in front of the **Images** field to select the .ZIP file containing the images of the products mentioned in the .CSV file.

The file name is displayed in the text box beside **Images**, as shown in [Figure 8.40](#).

---

**Note:** To associate specific images to products, ensure the image file names are included in the .CSV file.

---

5. Click **Browse** in front of the **File** field to select the .CSV file.  
The file name is displayed in the text box beside **File**, as shown in [Figure 8.40](#).
6. Click **Save**.  
The **Upload Complete** page is displayed, as shown in [Figure 8.41](#).

**Products** → [Products](#) > [Import](#) > [New Import](#) > Upload Complete

★ Your file to import has been received, but has not been processed. To begin processing, use the "Process Now" button. However, since processing requires a few minutes of configuration, you can choose to process the file later by using the "Process Later" button.

**Details**

Name	Hardware
Description	
Images	Product_images.zip [ <a href="#">Download File</a> ]
File Size	200 k
File	product.csv [ <a href="#">Download File</a> ]
File Size	1 k
Status	Import Pending
Entered	Asha Kadam 12/10/2007 1:28 AM
Modified	Asha Kadam 12/10/2007 1:28 AM

**Figure 8.41 Viewing the Upload Complete Page**

7. Click **Process Now** to initiate the processing of products.  
You can click **Process Later** to save the import data and continue processing later.  
Clicking **Process Now** displays the **Process Import** page, as shown in [Figure 8.42](#).



**Products** → [Products](#) > [View Imports](#) > [Import Details](#) > [Process Import](#)

**Import Properties**

Name	Hardware
File	product.csv
File Size	1 k
Images	Product_images.zip
Image File Size	200 k
Entered	Asha Kadam 12/10/2007 1:28 AM
Modified	Asha Kadam 12/10/2007 1:28 AM

**First 5 lines of the import file**

Line 1	"Product Name","Category","MSRP","Price","Cost","Long Description","Short
Line 2	"Air Conditioner","Office Equipment",10000,100,1500,"Used in all the meetin
Line 3	"Telephone","Office Equipment",15000,1500,150,,,,,"account_portal_contact
Line 4	"Samsung Monitor","Computer Peripherals",80000,8000,800,,,,,"account_poi
Line 5	"Logitech Mouse","Computer Peripherals",89000,8900,890,,,,,"account_porte

**General Errors/Warnings**

No errors/warnings found.

**Field Mappings**

Field	Maps to...	Errors/Warnings
Product Name	<input type="text" value="Product Name"/> ▼	
Category	<input type="text" value="Category Name"/> ▼	
MSRP	<input type="text"/> ▼	
Price	<input type="text" value="Price Amount"/> ▼	
Cost	<input type="text"/> ▼	
Long Description	<input type="text" value="Long Description"/> ▼	
Short Description	<input type="text" value="Short Description"/> ▼	
Product Code	<input type="text"/> ▼	
Images	<input type="text" value="Small Image Name"/> ▼	

Figure 8.42 Viewing the Process Import Page

- Map the field names in your .CSV file to the corresponding field names in the **Products** module.

Mapping enables you to associate the fields defined in your product import file with the product related fields defined in ConcourseSuite. For example, the field **Category** in the .CSV file must be mapped to **Category Name** in the **Products** module.

- Click **Process Now** to begin the processing.

The **View Import** page with the import name and status of the import file is displayed, as shown in [Figure 8.43](#).

Name		Status	Results			Entered	Modified
			Total	Success	Failed		
▼	Hardware	Running	0	0	0	12/10/2007 1:28 AM	12/10/2007 1:28 AM

**Figure 8.43 Viewing the Status of the Import**

- To approve the import, click the import name, as shown in [Figure 8.43](#).

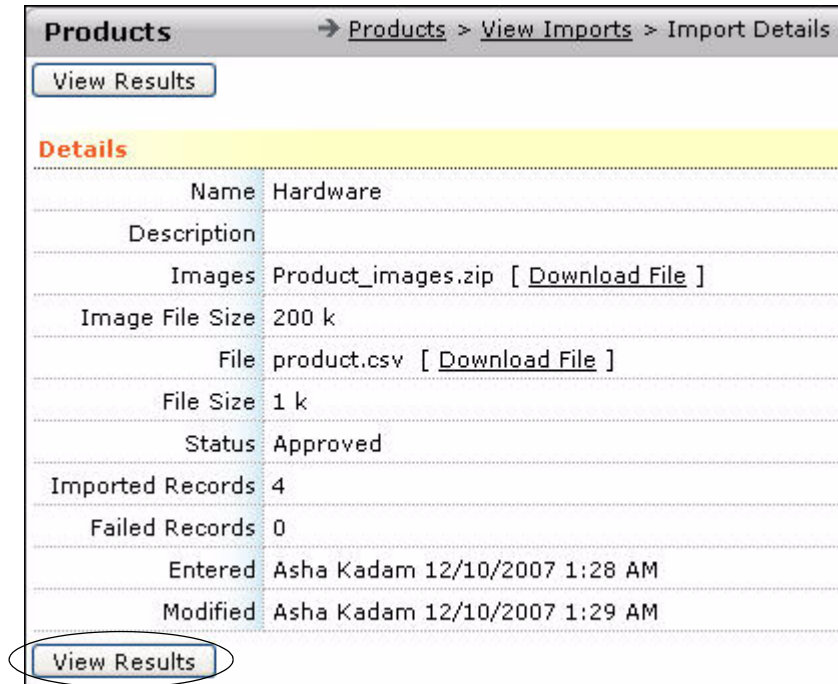
The **Import Details** page is displayed, as shown in [Figure 8.44](#).

Name	Hardware
Description	
Images	Product_images.zip [ <a href="#">Download File</a> ]
Image File Size	200 k
File	product.csv [ <a href="#">Download File</a> ]
File Size	1 k
Status	Pending Approval
Imported Records	4
Failed Records	0
Entered	Asha Kadam 12/10/2007 1:28 AM
Modified	Asha Kadam 12/10/2007 1:29 AM

**Figure 8.44 The Import Details Page**

- Click **Approve** to complete the process of importing.

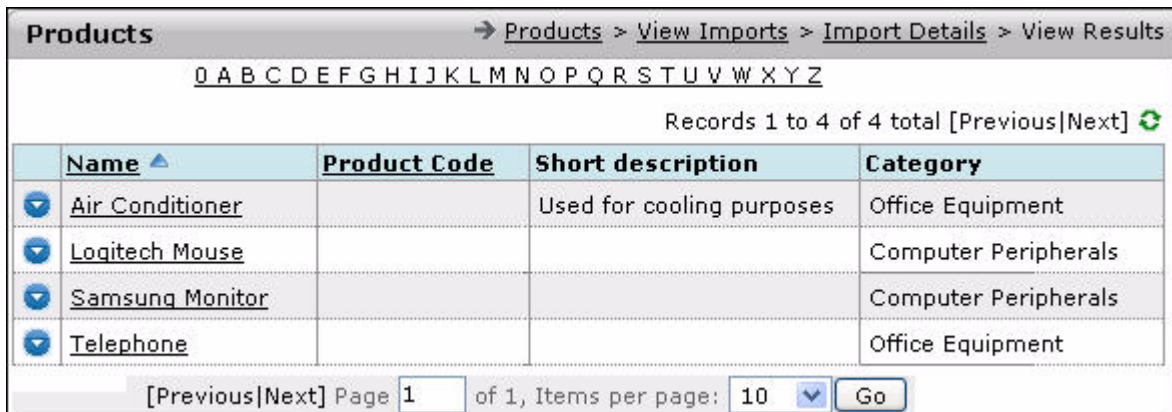
The **Import Details** page is displayed, shown in [Figure 8.45](#), giving you an option to view the imported products.



**Figure 8.45 Viewing Import Results**

12. Click **View Results**.

The **View Results** page listing the imported products is displayed, as shown in [Figure 8.46](#).



**Figure 8.46 Viewing the Imported Products**

13. Click the product name to view its details shown in [Figure 8.47](#).

Air Conditioner → Products >> Import Details > View Results > Product Details				
<b>Primary Information</b>				
SKU				
<b>Availability</b>				
Enabled	No			
Start Date				
Expiration Date				
<b>Additional Details</b>				
Short Description	Used for cooling purposes			
Long Description	Used in all the meeting rooms and central AC required for the floor.			
Special Notes				
<b>Record Information</b>				
Entered	Asha Kadam 12/10/2007 1:29 AM			
Modified	Asha Kadam 12/10/2007 1:30 AM			
<b>Price</b>				
MSRP	Price	Cost	Recurring Amount	Recurring Type
\$0.00	\$100.00	\$0.00	\$0.00	
<b>Image Files</b>				
File Type	File Name	Size	Date	
Thumbnail Image	No Image Available.			
Small Image		23 k	12/10/07 1:29:54 AM EST Asha Kadam	
Large Image	No Image Available.			

Figure 8.47 The Product Details Page

## Understanding Quotes

This chapter provides information on the **Quotes** module of ConcourseSuite. This module enables you to maintain quotes, which you provide to your customers, in an organized way.

This chapter consists of the following sections:

- ❑ [Section 9.1, “How Does This Module Help You?”](#)
- ❑ [Section 9.2, “Searching Quotes”](#)
- ❑ [Section 9.3, “Adding a Quote”](#)
- ❑ [Section 9.4, “Viewing Quote Details”](#)
- ❑ [Section 9.5, “Understanding the Actions Performed on Quotes”](#)
- ❑ [Section 9.6, “Adding Quote Notes”](#)
- ❑ [Section 9.7, “Viewing Quote History”](#)
- ❑ [Section 9.8, “Using the Quotes Logo Admin Feature”](#)

### 9.1 How Does This Module Help You?

In the normal course of business, your customers need to be informed of your special offers and prices for the various products and/or services that you offer. This information is usually conveyed in the form of a quote. These quotes differ from customer to customer, based on parameters including cost and time.

The **Quotes** module provides options for:

- Generating quotes
- Submitting quotes to your customers
- Maintaining each quote's history

Items being quoted are basically a list of products and services, which can be looked up from the product catalog.

You can access the **Quotes** module by clicking the **Quotes** tab. All quotes that refer to a certain account are available under the account's **Quotes** sub-tab. You can navigate to the specific account to review all its associated quotes. For more details, refer to [Section 7.13, “Adding Quotes”](#).

The menu bar in the **Quotes** page has the **Dashboards**, **Add**, and **Search** links, as shown in [Figure 9.1](#).



Figure 9.1 The Quotes Menu Bar

## 9.2 Searching Quotes

Once a customer base is formed, a number of quotes will be available on the system at a given point of time. The **Search Quotes** page can be accessed by clicking the **Search** link, as shown in [Figure 9.1](#). You can search for quotes by specifying the search criteria.

The image shows a search form titled 'Quotes' with a yellow header 'Search Quotes'. The form contains several input fields and radio buttons: 'Quote #' (text input), 'Quote Status' (dropdown menu with '-- None --'), 'Open/Closed' (radio buttons for 'All', 'Open', 'Closed'), 'Submit Status' (radio buttons for 'All', 'Not Submitted', 'Submitted'), 'Product Name' (text input), and 'SKU' (text input). At the bottom are 'Search' and 'Clear' buttons.

Figure 9.2 The Quotes Search Page

If you want to view all the available quotes, leave all fields empty and click **Search**. Searching for quotes in the system displays a list of quotes, as shown in [Figure 9.3](#). The page displays the following information:

- Number
- Version
- Account
- Description
- Status
- Entered (date of entry)
- Issued
- Closed

Number	Version	Account	Description	Status	Entered	Issued	Closed
001000	1.0	Akers	CRM - First Level	-- None --	11/15/2007		
			New Quote	Incomplete	11/19/2007		

Figure 9.3 Quotes Search Results

## 9.3 Adding a Quote

Click **Add a Quote** on the **Search Results** page or **Add** on the menu bar to add a quote. The **Add Quote** page is displayed, as shown in [Figure 9.4](#).

The following details can be specified for a quote:

- **Description** - A concise description of the purpose for which the quote is being issued.
- **Organization** - The customer account for which the quote is being issued.
- **Contact** - The contact for this customer account, to whom the quote will be sent.
- **Email address/Phone number/Fax number** - The customer's contact details.
- **Address** - The customer's mailing address.
- **Opportunity** - The opportunity to which the quote applies.
- **Delivery** - The mode of delivery of the quote.
- **Status** - The current status of the quote.
- **Expiration date** - The expiration date of the quote.
- **Logo** - Logo refers to the company logo that is displayed on the quote.  
An admin can configure the logos that can be included as part of the quote's header information.
- **Internal Notes** - Any additional details about the quote.

Click **Insert** after you have entered all the information.

**Quotes** → [Quotes](#) > Add Quote

**Add Quote**

Description	<input type="text"/>	*
Organization	None Selected * <a href="#">[Select]</a>	
Contact	-- None -- ▾ *	
Email Address	<input type="text"/> <a href="#">[Select Email Address]</a>	
Phone Number	<input type="text"/> <a href="#">[Select Phone Number]</a>	
Fax Number	<input type="text"/> <a href="#">[Select Fax Number]</a>	
Address	<input type="text"/> <a href="#">[Select Address]</a>	
Opportunity	None Selected <a href="#">[Select]</a> <a href="#">[Clear]</a>	
Delivery	-- None -- ▾	
Status	-- None -- ▾	

Figure 9.4 The Add Quote Form

## 9.4 Viewing Quote Details

After you have entered the basic quote information and inserted the quote into the database, the **Quote Details** page is displayed, as shown in [Figure 9.5](#).



# 001003 (1.0) / Quote 2 → Quotes > Search Results > Quote Details

Status: **Approved internally** Does not Expire

Submit Modify Clone Add Version Print Delete Close

**Quote prepared for**

Contact: **Joe Smith**  
 Organization: Focus Tech

List of Items							
	Item	SKU	Item Name	Item Description	Quantity	Unit Price	Estimated Delivery
▼	1.	88	Insurance	abc	5	\$8,500,000.00	

Choose Create  Show the grand total price  Show the sub-total price

**Remarks**  
 No remarks found for the quote  
 Choose Create

**Terms and Conditions**  
 No terms and conditions found for the quote.  
 Choose Create

Submit Modify Clone Add Version Print Delete Close

Figure 9.5 Quote Details


On the **Quote Details** page, you can define items (products and services) that need to be included in the quote. For more details, refer to [Section 9.4.1, “Adding Quote Items”](#), for any specific remarks, refer to [Section 9.4.2, “Adding Quote Remarks”](#), and for specifying terms and conditions, refer to [Section 9.4.3, “Adding Quote Terms and Conditions”](#). After entering the contact information and the list of items, the quote details display can be configured. To configure the quote’s details, you can check any or all of the checkboxes as listed below:

- **Show the sub-total price**, which displays an additional sub-total column in the list of items table.  
 The column, as shown in [Figure 9.5](#), displays an individual item's price, taking into account its specified quantity. For example, if 'x' costs \$180, then 10 numbers of 'x' would be  $10 * \$180 = \$1800$ .
- **Show the grand total price**, as shown in [Figure 9.5](#), displays the grand total amount of all items for the quote under consideration.

---

**Note:** It is advisable to turn on both the options for easier verification.

---

Clicking  displays a context menu with the following tasks:

- Cloning the selected quote
- Modifying the selected quote
- Removing the selected quote

## 9.4.1 Adding Quote Items

You can add any number of items (products and/or services) to an existing quote. You can select the items from an existing catalog of products and services from a pop-up window, which is displayed by clicking the **Choose** button, or create a quote item using **Create Item** from the pop-up window, as shown in [Figure 9.6](#). This pop-up window is displayed by clicking **Create** on the **Quote Details** page.

The screenshot displays a web browser window with a pop-up form titled "Concourse Suite - Windows Internet Explorer". The URL is <http://66.11.2.126/centric5e/QuotesProducts.do?command=createForm&quoteId=1>. The form has a "Create Item" button and a "Cancel" button. The form is divided into several sections:

- Quote Item Details**:
  - Item Name:
  - Abbreviation:
  - Item Description:
  - SKU:
  - Estimated Delivery:  [Select]
- Price Details**:
  - Unit Price: USD  0
  - Quantity:  0
- Additional Details**:
  - Short Description:
  - Long Description:

The background shows the main "Quote Details" page for quote # 001000 (1.0) / CRM - First Level. It includes a "List of Items" table with columns "Item", "SKU", and "Item Name", and "Choose" and "Create" buttons. There are also "Remarks" and "Terms and Conditions" sections, each with "Choose" and "Create" buttons. At the bottom, there are "Submit", "Modify", and "Clone" buttons.

Figure 9.6 Quote Add Item

## 9.4.2 Adding Quote Remarks

You can add remarks to a quote by:

- Clicking **Choose**, as shown in [Figure 9.7](#). A pop-up window is displayed listing the existing remark. Select an appropriate remark and click **Done**.
- Creating a new remark for the quote by adding it to the existing pool. This can be done by clicking the **Create** button, as shown in [Figure 9.8](#).

# 001000 (1.0) / CRM - First Level

Status: Incomplete Does not Expire

Submit Modify Clone Add Version Print Delete Close

**Quote prepared for**

Contact **Bunny Akers**

Organization Akers, Bunny

**List of Items**

Item	SKU	Item Name	Item Description
Choose	Create		

**Remarks**

- 1. Prices include flat black
- 2. Textured casting rec

Choose Create

**Terms and Conditions**

- 1. All mechanical prop
- 2. All prices subject to

Choose Create

Submit Modify Clone Add Version Print Delete Close

http://66.11.2.126 - Concourse Suite - Mo...

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 3 of 3 total [Previous|Next]

**Remarks**

- Prices include flat black poeder coat finish
- Prices include flat black poeder coat finish
- Textured casting recommended

Done Cancel [Check All] [Clear All]

Done

Figure 9.7 Selecting Quotes Remarks

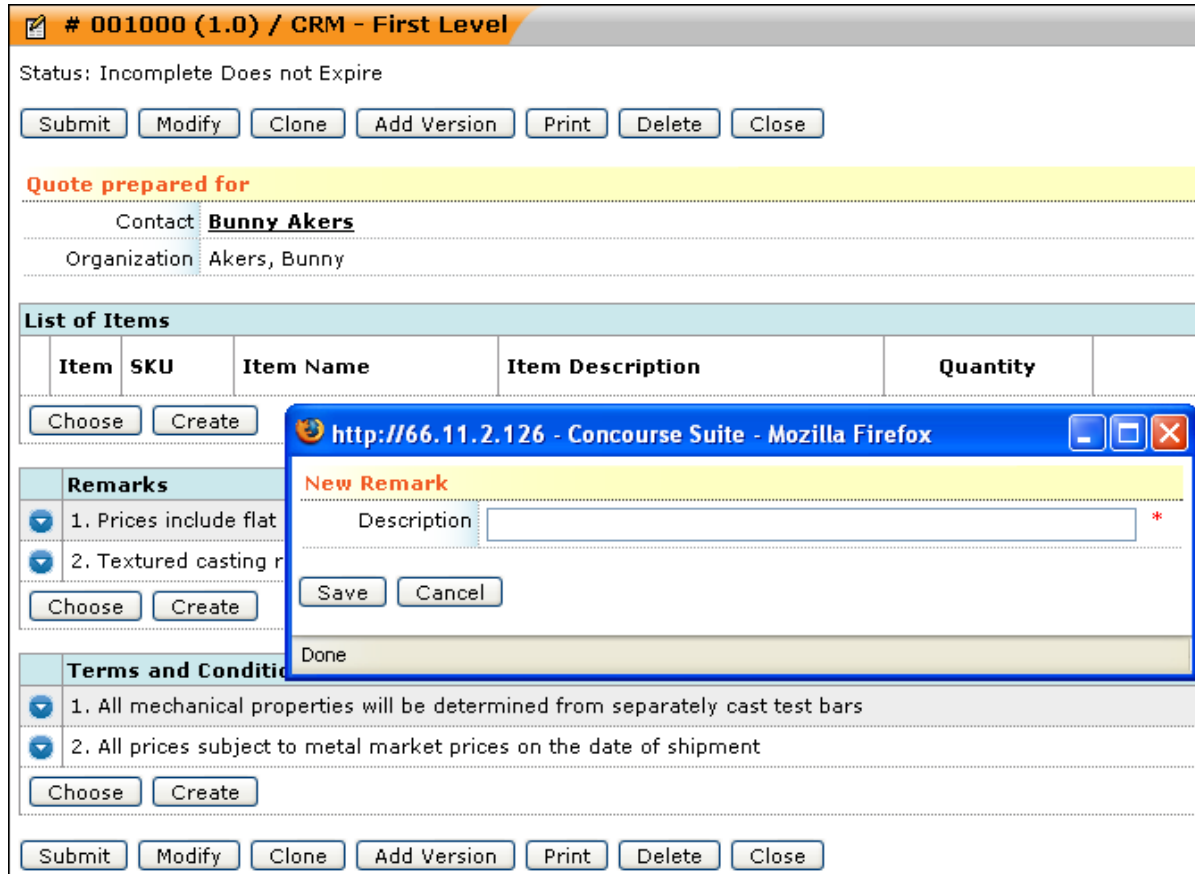


Figure 9.8 Adding Quotes Remarks

### 9.4.3 Adding Quote Terms and Conditions

You can add terms and conditions to a quote by:

- Clicking **Choose**, as shown in [Figure 9.9](#). A pop-up window is displayed listing the existing terms and conditions. Select an appropriate option and click **Done**.
- Creating the terms and conditions for the quote by adding it to the existing pool. You can create terms and conditions by clicking the **Create** button, as shown in [Figure 9.9](#).

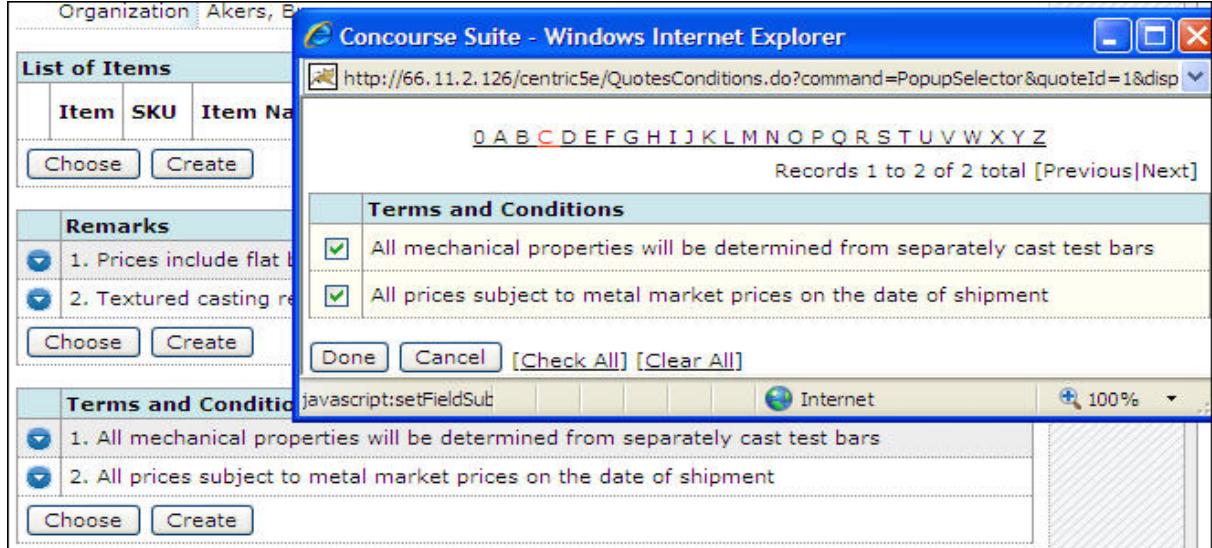


Figure 9.9 Quote Terms and Conditions

## 9.5 Understanding the Actions Performed on Quotes

Once a quote has been prepared, you can perform various actions on the quote. The subsequent sections provide information on each action that can be performed on a quote.

### 9.5.1 Submitting a Quote

You can submit the quote by mailing the PDF version of the quote to the customer, or by delivering the paper version of the quote through other means. When you click **Submit** on the **Quote Details** page, a pop-up window is displayed that enables you to determine the means of delivering the quote. You can also set a new status for the quote, if necessary. Select from the options, and click **Save** to perform the operation. A quote submit page is shown in [Figure 9.10](#).

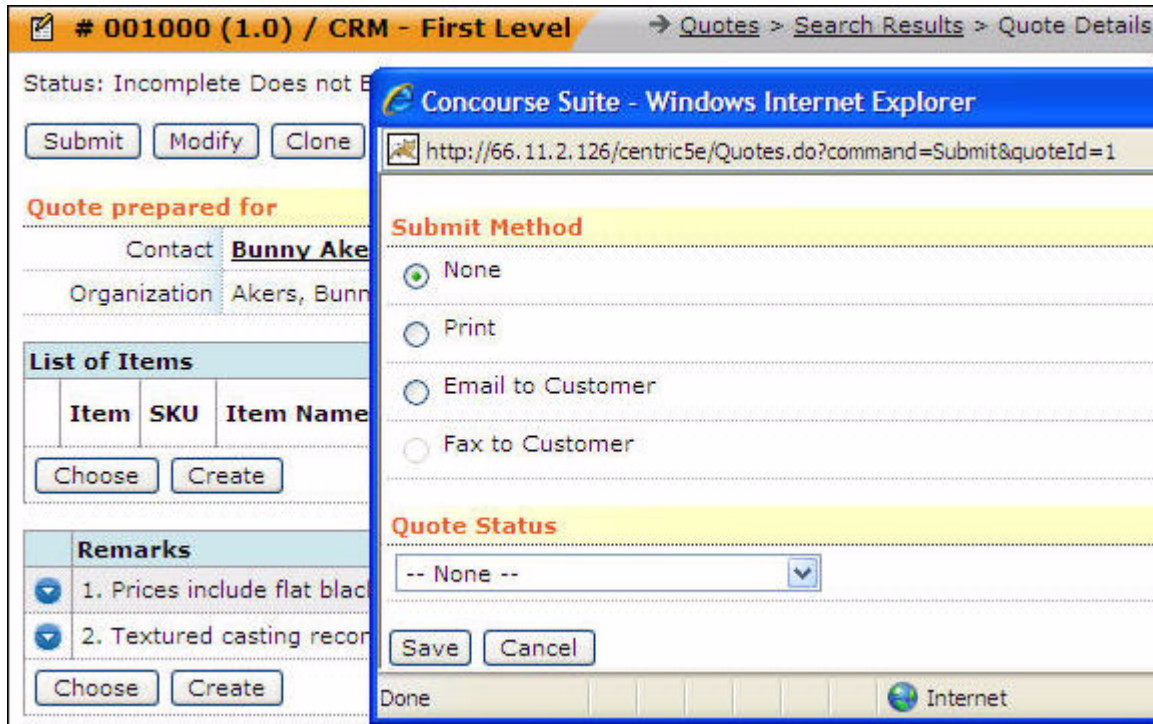


Figure 9.10 Submit a Quote

## 9.5.2 Modifying a Quote

To edit details of a quote, click **Modify** on the **Quote Details** page, shown in [Figure 9.11](#).

# 001000 (1.0) / ADD\_A\_QUOTE → Quotes > Search Results > Quote Details

Status: Pending customer acceptance Does not Expire

Submit **Modify** Clone Add Version Print Delete Close

**Quote Details**

Issued Date 12/6/2007

**Quote prepared for**

Contact **test3 test3**  
 Organization Test  
 Email [TFELTMAN@CENTRICCRM.COM](mailto:TFELTMAN@CENTRICCRM.COM)

**List of Items**

Item	SKU	Item Name	Item Description	Quantity	Unit Price	Estimated Delivery	Sub-Total
1.		prod q	product p	2	\$4.00		\$6.00
		<b>Option</b>	<b>Value</b>				
		discount	1		(\$1.00)		

Choose Create  Show the grand total price  Show the sub-total price **\$6.00**

**Remarks**

1. Slow payer - we'll make more off of late payment fees than profit on the products

Choose Create

**Terms and Conditions**

1. new terms  
 2. you must pay in 90 days or there is a 25% late fee per quarter added

Choose **Create**

Submit Modify Clone Add Version Print Delete Close

Figure 9.11 The Quote Details Page

The **Modify Quote** page is displayed, as shown in [Figure 9.12](#).

Figure 9.12 The Modify Quote Page

Click **Update** to commit the changes or **Cancel** to abort the changes.

### 9.5.3 Cloning a Quote

Often, you may need to use similar quotes for a number of your customers. Instead of creating a new one all over again, you can use the cloning feature.

Cloning quotes is a feature that enables you to add new quotes, without having to re-enter common information. You can clone a quote using the **Clone** option.

To clone a quote:

1. Click **Clone**. A pop-up window that enables you to change information for the cloned quote will be displayed.
2. Select a new account and/or contact.

The rest of the details will be automatically copied from the source quote to the cloned one, as shown in [Figure 9.13](#).



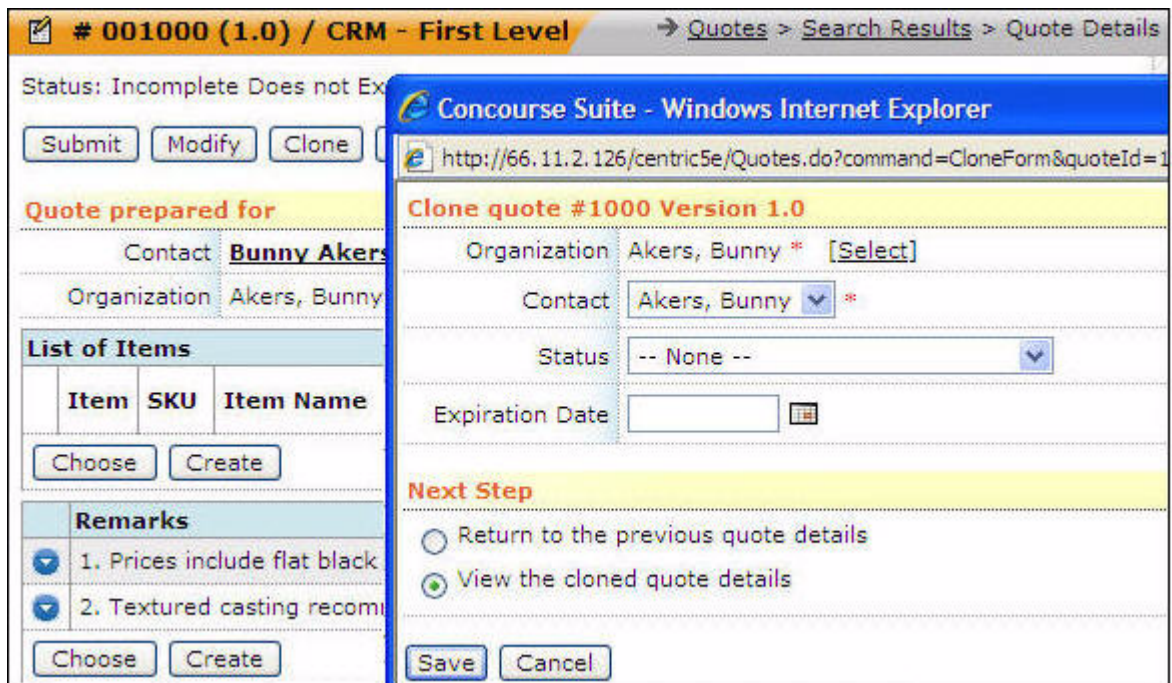


Figure 9.13 Clone a Quote

You can select to view either for the source quote or the cloned one.

3. Click **Save** to commit the changes, or **Cancel** to abandon them.

## 9.5.4 Adding a Quote Version

You may need to update a quote for various reasons, such as price changes, holiday discounts, and special offers. This would require you to emphasize that this quote is not a regular modification, but a new version of the initial quote. To add a new version of the quote, click **Add Version** located on the **Quote Details** page.

When you click this option, you will be prompted to confirm if you want to create a new version of the quote. Clicking **OK** created a new version of the quote and displays the **Quote Details** page. The system automatically adds a note, with a remark stating that this quote has been derived from a parent quote and is a version.

You can make changes to the version and click **Update** to save these changes.

## 9.5.5 Printing a Quote

Clicking the **Print** option enables you to open or save the PDF version of the quote. You can either print the quote or email it as an attachment.

## 9.5.6 Deleting a Quote

Click **Delete** to delete a quote when it is no longer necessary to have it in the system.

## 9.5.7 Closing a Quote

When a quote is complete or becomes invalid for any reason, you can close the quote using the **Close** button on the **Quote Details** page. Clicking the **Close** option, displays a pop-up window prompting you to select the reason for closing the quote, as shown in [Figure 9.14](#). This window provides fields to specify the reason for closing the quote. Click **Save** to confirm your actions.

Closing a quote will not destroy the quote. The quote will be available for future use. Closed quotes continue to be displayed in quote searches, but you cannot modify them. However, you can:

- Clone the quotes
- Create newer versions of the quotes
- Print the quotes
- Delete the quotes

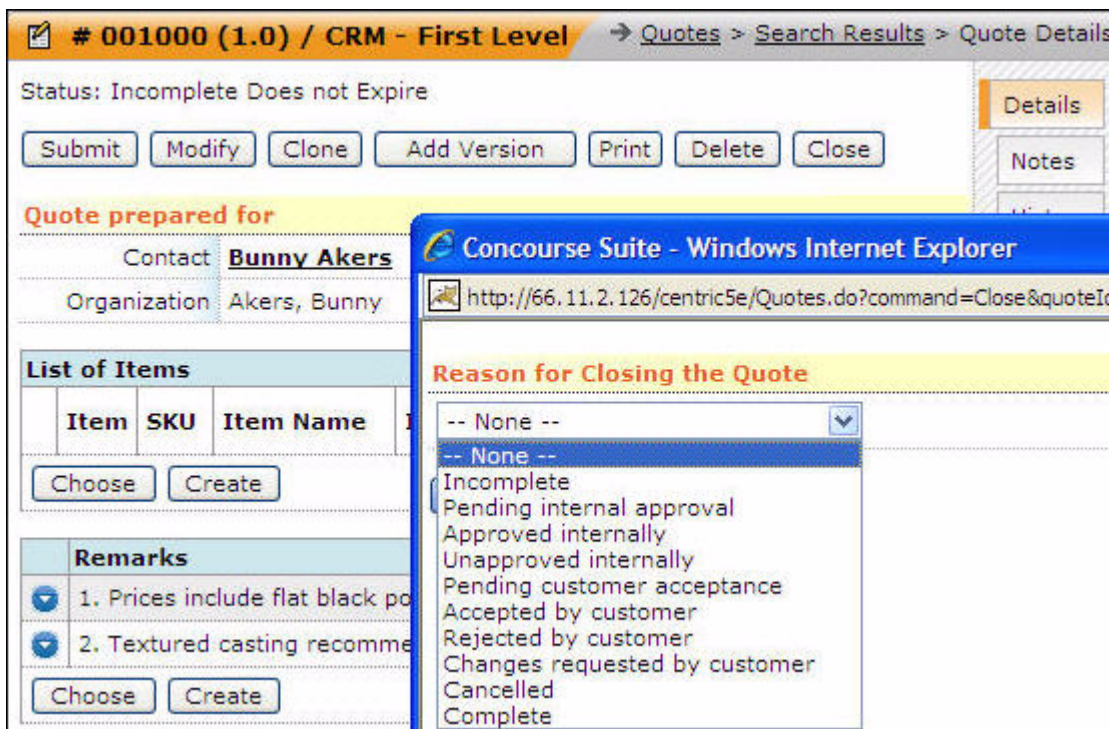


Figure 9.14 Close a Quote

## 9.6 Adding Quote Notes

The **Quote Notes** page enables maintenance of notes and remarks related to a specific quote, as shown in [Figure 9.15](#). This page can be accessed by clicking the

**Notes** sub-tab on the **Quote Details** page. ConcourseSuite automatically adds certain special remarks during various stages of a quote. You can also store crucial remarks against a quote which will help other users review the quote.

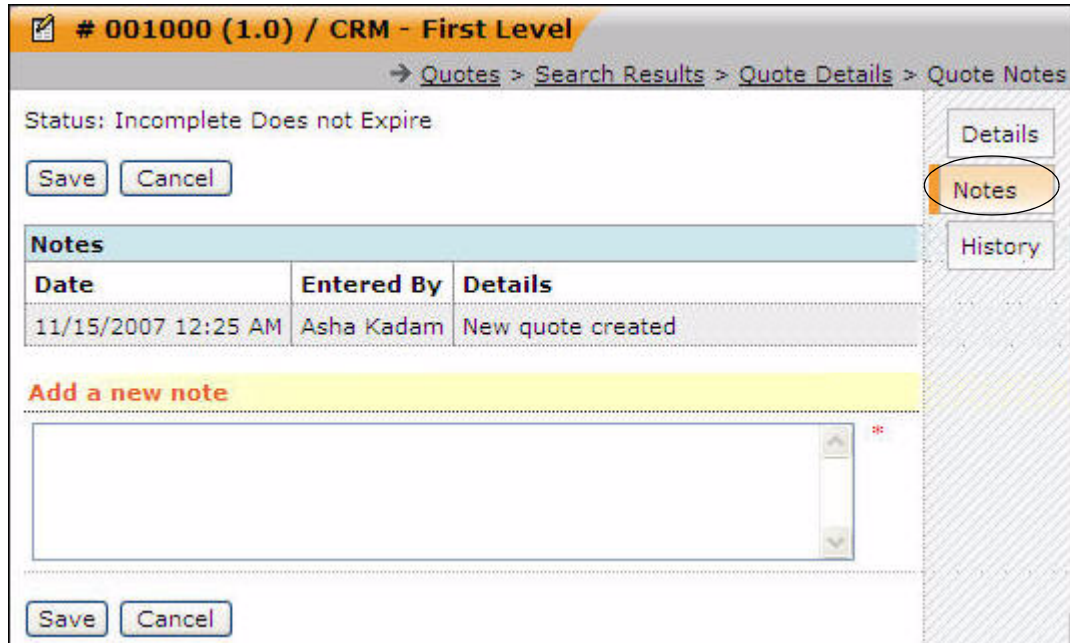


Figure 9.15 Quote Notes

## 9.7 Viewing Quote History

The **Quote History** page is a read-only area. This page can be accessed by clicking the **History** sub-tab on the **Quote Details** page. ConcourseSuite automatically adds special remarks at various stages and provides a view of how the quote has evolved over a period of time. The **Quote History** page is shown in [Figure 9.16](#).

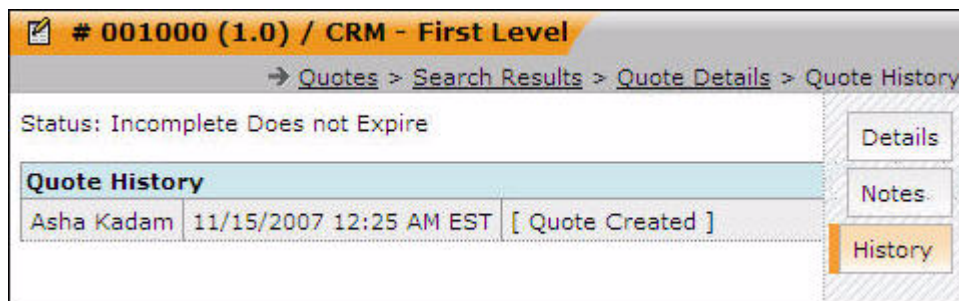


Figure 9.16 Quote History

## 9.8 Using the Quotes Logo Admin Feature

When a quote is ready to be submitted to a customer, the company's logo can be used as part of the quote header to customize its appearance. Any user with Administrator access to the quote logo configuration feature can upload a set of logos that users can attach to a quote.

The logos are available as a list of optional fields, when adding or modifying a quote. You can upload a specific logo that needs to appear on the quote, as shown in [Figure 9.17](#).

Logos that are uploaded under the **Admin** module can be in any of the following formats - .GIF, .JPG, .JPEG, .TIFF, .PNG, .BMP, .WMF.

→ Admin > Configure Modules > Quotes > Logos > Upload Logo

★ NOTE: The logo file being uploaded should be in one of the following formats.  
\*.gif \*.jpg \*.jpeg \*.tiff \*.png \*.bmp \*.wmf

**Upload a New Logo**

Subject  \*

File

Default Logo  Mark this file as the default logo

\* Large files may take awhile to upload.  
Wait for file completion message when upload is complete.

Figure 9.17 Quote Logo Upload Feature

## Understanding Communications

This chapter provides information on the **Communications** module of ConcourseSuite. This module enables you to arrange, execute, and monitor promotional campaigns, which lead to long-standing relationships with customers through pro-active communication.

This chapter consists of the following sections:

- ❑ [Section 10.1, “How Does This Module Help You?”](#)
- ❑ [Section 10.2, “Accessing the Dashboards Page”](#)
- ❑ [Section 10.3, “Accessing the Communications Overview”](#)
- ❑ [Section 10.4, “Viewing Campaign Details”](#)
- ❑ [Section 10.5, “Using Campaign Builder”](#)
- ❑ [Section 10.6, “Adding a Campaign”](#)
- ❑ [Section 10.7, “Adding Groups”](#)
- ❑ [Section 10.8, “Adding Messages”](#)
- ❑ [Section 10.9, “Adding Attachments”](#)

### 10.1 How Does This Module Help You?

Interactive surveys in your campaigns help in making your business effective, by enabling more involvement from customers. Campaigns and surveys also make your relationship with your customers long-standing and mutually beneficial. They help expand your business through word-of-mouth advertising.

ConcourseSuite’s **Communications** module can be used to:

- Register campaigns and control their execution
- Send a single message to multiple recipients
- Schedule campaigns for later delivery
- Create an interactive forum for exchange of ideas and information
- Track and analyze campaigns that have been executed and activate

Click **Communications** to access this module. A menu bar located on top of the screen displays individual links to each feature, as shown in [Figure 10.1](#).

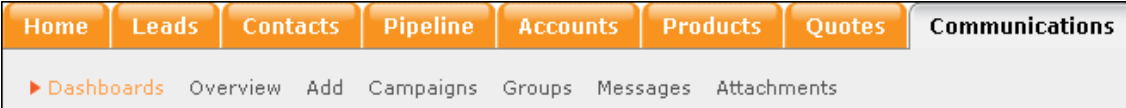


Figure 10.1 The Communications Menu Bar

## 10.2 Accessing the Dashboards Page

The **Dashboards** page is the default page in the **Communications** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 10.3 Accessing the Communications Overview

Click **Overview** to access the **Overview** page. This page lists all active campaigns, as shown in [Figure 10.2](#), and enables you to:

- View campaign details
- Delete unwanted or defunct campaigns
- Export the data of a campaign survey into an Excel spreadsheet for reference and analysis

Name	Start Date	# Recipients	Status	Active?
<a href="#">Campaign Survey</a>	12/3/2007 12:00 AM EST	2	In Queue	Yes

Figure 10.2 Communications Overview

You can select from the following options:

- Running campaigns that belong to you
- All running campaigns at a given point of time or all instant ones
- All instant campaigns

If there is a large list of campaigns, you can use the alphabet indicator at the top to find a campaign by the first letter of its name, so tracking down a particular campaign is easier. The message status of each campaign is listed, along with the number of recipients, start date, and activity status.

## 10.4 Viewing Campaign Details

Campaigns can be either running campaigns, which is a campaign where all details are known and no adjustments are required, or an inactive campaign, which is a campaign where one can introduce changes and make additions to the campaign parameters.

When you click the name of a **Running Campaign** in the overview, you will navigate to the multi-tabbed **Campaign Details** page, as shown in [Figure 10.3](#).

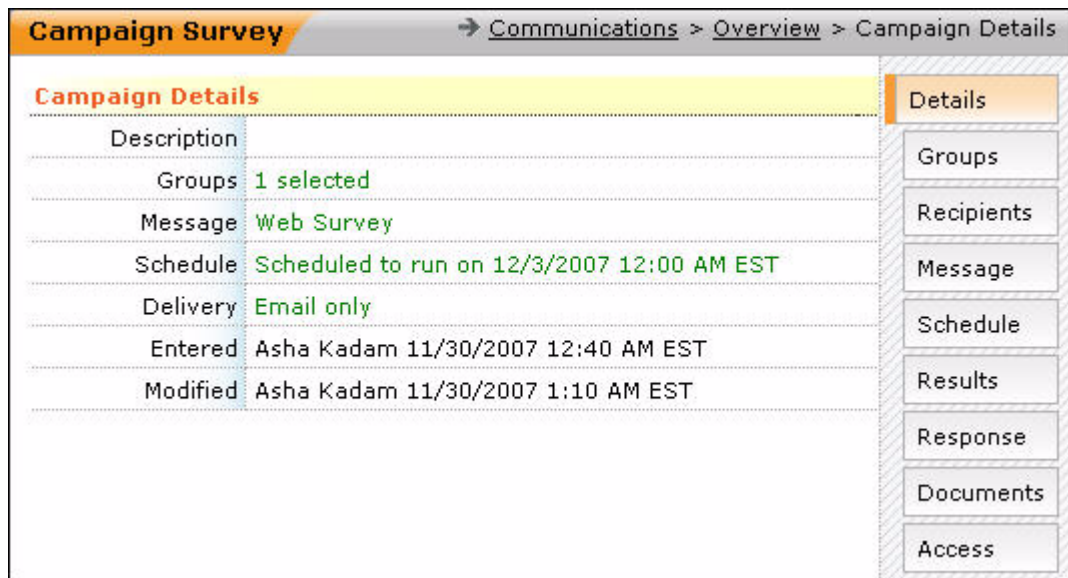


Figure 10.3 Active Campaign Details

The sub-tabs on the **Campaign Details** page listed are:

- **Details** - displays all basic information concerning the campaign, as specified below:
  - Short description of the campaign.
  - Related groups.
  - Message details and delivery details (if sent through email, fax, or mail merge).
  - Schedule (date of delivery).
  - Information about the user who created and last modified the campaign.
- **Groups** - displays a page that contains a description of the selection criteria for the contacts to which the campaign applies.
- **Recipients** - lists the recipients of the campaign message. For more details, refer to [Section 10.4.1, "Adding Recipients to Active Campaigns"](#).
- **Message** - displays the campaign message.
- **Schedule** - lists the campaign message delivery schedule and delivery method.
- **Results** - displays a summary of results of a survey that you may have sent along with the campaign message.

- **Response** - lists the people who responded to the survey that you may have sent along with the campaign message.

By clicking a person's name, you can view that person's response.

- **Documents** - displays the documents attached to the campaign. You can attach a document by clicking **Add a Document** located at the top of the **Documents** page. You can also export campaign survey results to an MS Excel spreadsheet by clicking **Export Campaign to Excel file**.

When you click an inactive campaign name on the campaigns list, the **Campaign Details** page is displayed. You can define campaign attributes including groups and messages. You can also rename, activate, or delete a campaign.

## 10.4.1 Adding Recipients to Active Campaigns

Selecting the **Recipients** sub-tab, as shown in [Figure 10.3](#), lists the recipients of the campaign message, as shown in [Figure 10.4](#).

**Campaign Survey** → [Communications](#) > [Overview](#) > [Campaign Details](#) > [Recipients](#)

[Add Recipient](#)    0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 2 of 2 total [Previous|Next] ↻

Count	Name ▲	Company	Sent Date	Status
1	lead5			
2	newlead			

[Previous|Next] Page  of 1, Items per page:

Details  
Groups  
**Recipients**  
Message  
Schedule  
Results  
Response  
Documents  
Access

**Figure 10.4 Viewing the Recipients Page**

To add a new recipient, click the **Add Recipient** link. The **Add Recipient** pop-up window is displayed, as shown in [Figure 10.5](#).



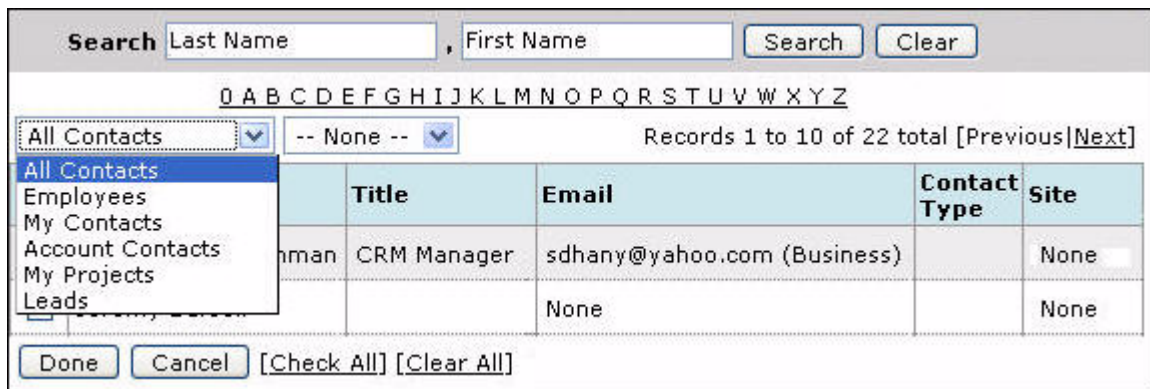


Figure 10.5 Adding Recipients

Click the **Select** link beside the contact to add the contact to the recipient list. The recipient list is updated with the new entry, as shown in Figure 10.6.

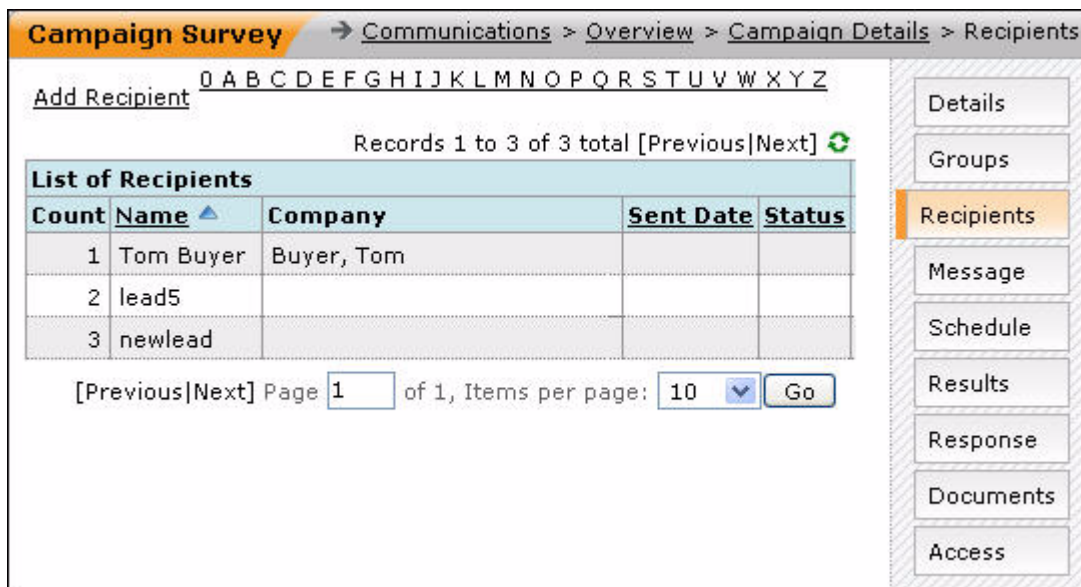


Figure 10.6 Updated Recipient List

Recipients can also select to unsubscribe to campaign emails by selecting the **No Email Please** option in the contact record, as shown in Figure 10.7. For more details, refer to Section 5.3.5, "Modifying Contacts".



Figure 10.7 Unsubscribing Emails in the Contact Record

The field **Email/Messages** on the **Account History** page enables you to check if the recipient has chosen to unsubscribe email messages, as shown in **Figure 10.8**. If this option is selected, it indicates that the recipient has unsubscribed to receiving messages.

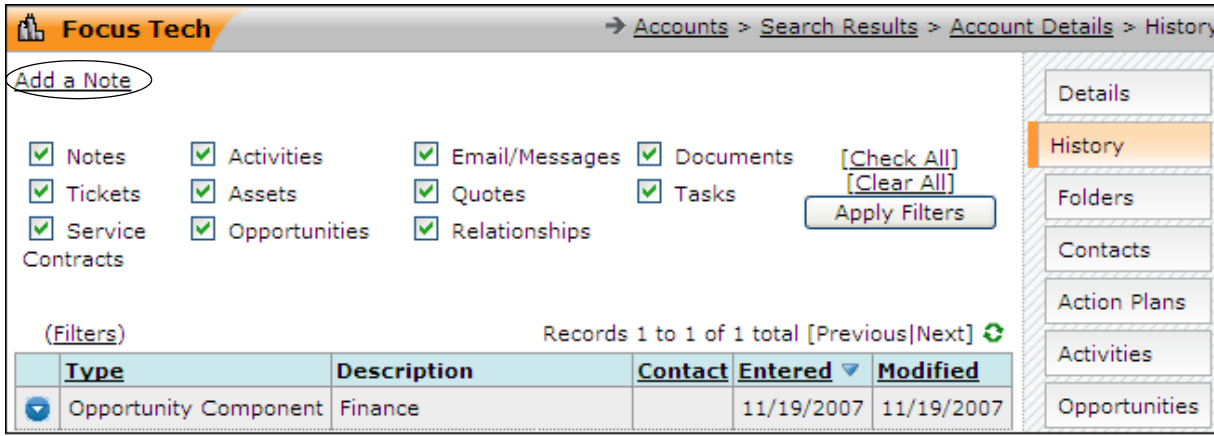


Figure 10.8 Viewing the Account History Page

## 10.5 Using Campaign Builder

Click **Campaigns** on the main menu. A page with the following details is displayed, as shown in **Figure 10.9**:

- Group of contacts to which the campaign was addressed
- Message details
- Delivery schedule
- Start date

The campaigns displayed on this page are incomplete or inactive. A campaign is considered incomplete or inactive when:

- you have not defined the groups, messages, or delivery details.
- all the above-mentioned details have been specified, but the campaign has not been activated.

You can navigate among the campaigns using the alphabet indicator located at the top and view campaign details by clicking campaign names.



Figure 10.9 Campaign List

Clicking  displays a context menu, with options to:

- View campaign details
- Modify campaign details
- Delete a campaign

To activate an incomplete campaign, click the **Activate** link on the **Campaign List** page, which is displayed once you have added Groups, Messages, and Delivery information in the campaign.

## 10.6 Adding a Campaign

To add a campaign:

1. Click **Add** on the menu bar, as shown in [Figure 10.1](#) or click **Add a Campaign**, as shown in [Figure 10.9](#).

The campaign builder will lead you through the process of registering a new campaign.

2. Enter the name of your campaign and a brief description.

**Communications**

Insert Cancel

**Begin by naming the campaign**

Campaign Name \*

Description

Access to Active Campaigns

**User Group Name**

No User Groups selected

Insert Cancel

Figure 10.10 Adding a Campaign

3. Click **Insert** and the inactive **Campaign Details** page is displayed, as shown in [Figure 10.11](#).

**Communications** → [Communications](#) > [Campaign List](#) > Campaign Details

**Campaign:** Company Survey

- ◆ Select from the following items to build a campaign
- ◆ Items can be worked on in any order
- ◆ Campaigns will not start until each section is complete, and the campaign has been activated
- ◆ Campaign items can be accessed by all users who have access to campaigns

Group(s)	Message	Attachments	Delivery
No groups selected.	No Message Selected	None	Not scheduled
<a href="#">Choose Groups</a>	<a href="#">Choose Message</a>	<a href="#">Choose optional attachments</a>	<a href="#">Choose Options</a>

This campaign is not ready to be activated.  
Once all of the required items have been selected, the activate button will appear here.

**Campaign Details**

Description

Created: Asha Kadam 1/7/2008 4:04 AM EST

Modified: Asha Kadam 1/7/2008 4:04 AM EST

Figure 10.11 Inactive Campaign Details

This page lists the campaign items (groups, message, attachments, and delivery) and instructions concerning the campaign completion and activation. The campaign is incomplete until all the details are entered.

4. From the options in **Groups**, select the groups, as shown in [Figure 10.12](#), to whom the campaign is addressed (by designation, department, and area). For more details, refer to [Section 10.7, “Adding Groups”](#). You can preview the recipients to confirm the target audience. Click **Update Campaign Groups** when you have selected a group.



The screenshot shows a dialog box titled "Communications". At the top, there are two buttons: "Update Campaign Groups" and "Cancel". Below this, a yellow bar indicates the "Campaign: Company Survey". Underneath is a dropdown menu labeled "My Groups" with a downward arrow. A red heading "Select groups for this campaign" is followed by a list of groups. The group "Insurance Sector East Coast" is selected, indicated by a checked checkbox and a blue oval around the text. At the bottom, there are two more buttons: "Update Campaign Groups" and "Cancel".

**Figure 10.12 Choosing Groups**

5. Select the campaign message from the **Message** options. For more details, refer to [Section 10.8, “Adding Messages”](#).  
A preview is displayed, as shown in [Figure 10.13](#).

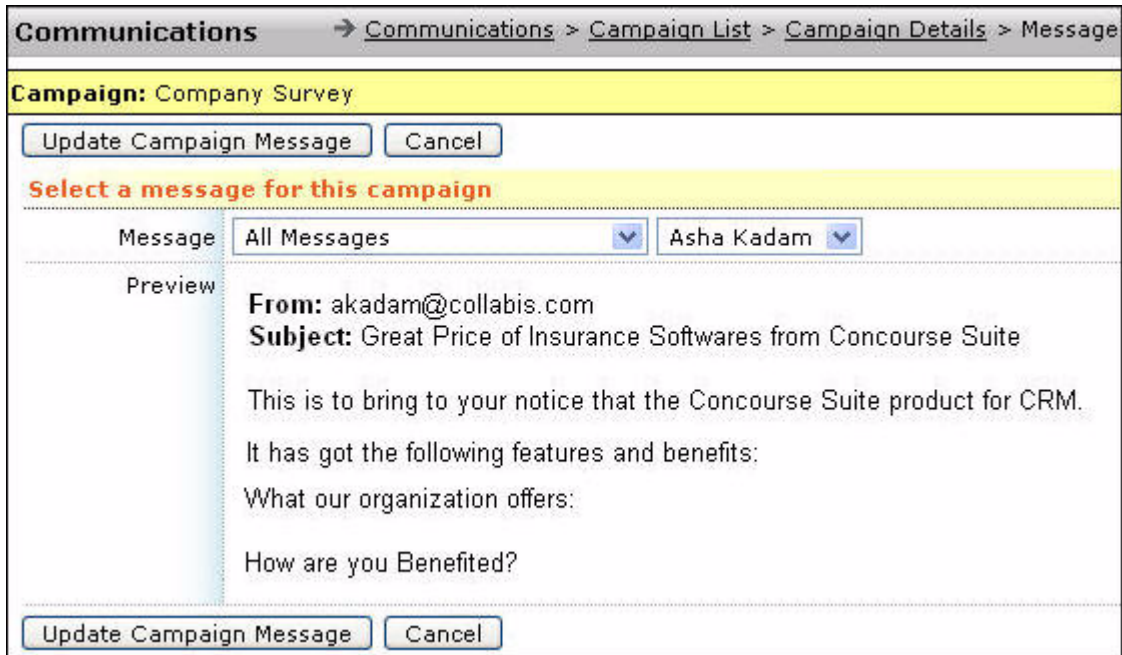


Figure 10.13 Choosing the Message

6. Click **Update Campaign Message**.

The **Attachments** page is displayed. You can include documents with your message to make your campaign interactive. These documents may include:

- Survey
- Address request update



Figure 10.14 Choosing Attachments

7. Click the **Change survey** link, as shown in **Figure 10.14**.

The **Surveys** page is displayed, as shown in **Figure 10.15**.

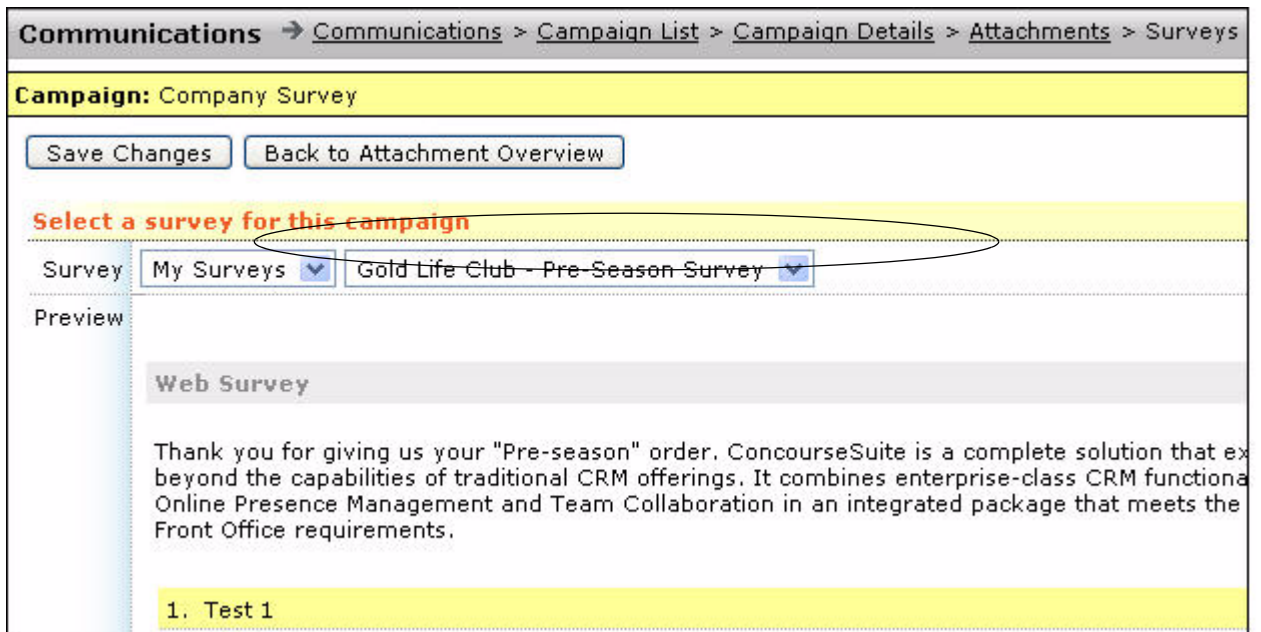


Figure 10.15 Attaching a Survey to a Campaign

8. Select the survey and click **Save Changes**.
9. Click the **Change file attachments** link, as shown in [Figure 10.14](#).

The **File Attachments** page is displayed, as shown in [Figure 10.16](#). As the campaign is in an incomplete stage, you can make the required changes and attach the modified file or a new file. Once you have attached the file, click **Upload File**. The **Delivery page** is displayed, as shown in [Figure 10.17](#).

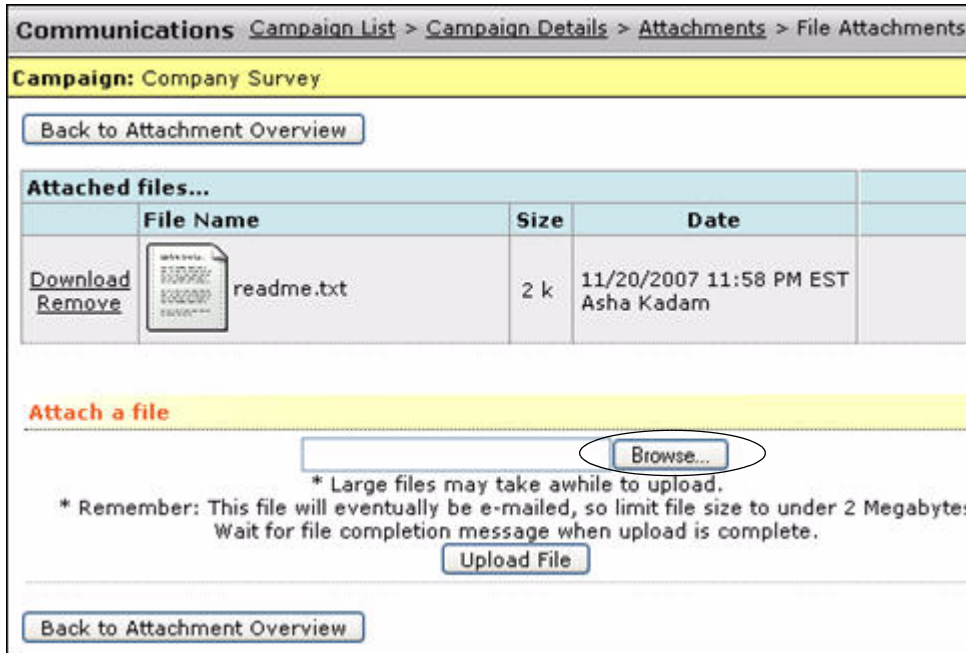


Figure 10.16 Attaching Files to a Campaign

10. Enter the campaign delivery date and specify the time. Select the delivery method from the **Delivery Method** drop-down menu.

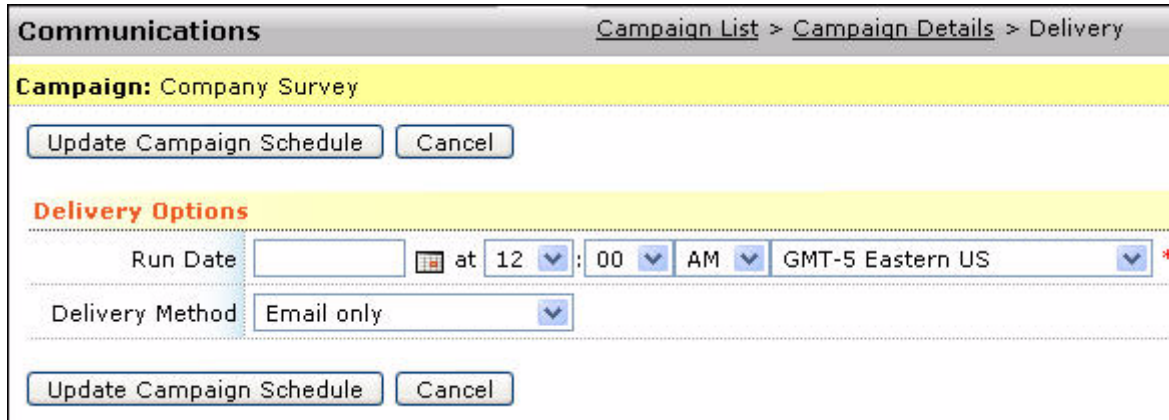


Figure 10.17 Choosing Delivery Options

11. Click **Update Campaign Schedule**.
  - The **Campaign Details** page is displayed, as shown in [Figure 10.18](#). You can:
    - Activate the campaign
    - Rename the campaign
    - Delete the campaign



**Communications** → [Communications](#) > [Campaign List](#) > Campaign Details

**Campaign:** Company Survey

- ◆ Select from the following items to build a campaign
- ◆ Items can be worked on in any order
- ◆ Campaigns will not start until each section is complete, and the campaign has been activated
- ◆ Campaign items can be accessed by all users who have access to campaigns

Group(s)	Message	Attachments	Delivery
1 selected	Asha Kadam	Survey Address update request	Scheduled for 1/14/2008 12:00 AM EST Email only
<a href="#">Choose Groups</a>	<a href="#">Choose Message</a>	<a href="#">Choose optional attachments</a>	<a href="#">Choose Options</a>

This campaign has been configured and can now be activated. Once active, today's campaigns will begin processing in under 5 minutes and cannot be canceled. Verify the campaign then [Click to Activate](#).

**Campaign Details**

Description	
Created	Asha Kadam 1/7/2008 4:04 AM EST
Modified	Asha Kadam 1/7/2008 4:14 AM EST

[Rename Campaign](#) [Delete Campaign](#)

**Figure 10.18 Activating a Campaign**

12. Click the **Click to Activate** link to activate and submit the campaign after all the necessary modifications have been made.

---

**Note:** The tab **Click to Activate** is displayed only after all the details are entered.

---

However, if you do not want to activate the campaign now, you can activate it at a later stage. For more details, refer to [Section 10.5, "Using Campaign Builder"](#).

## 10.7 Adding Groups

For each campaign, you have to define the target audience of the campaign. You can add a number of groups in advance, and use them as required.

Click **Groups** on the module's main menu, and a list of all available contact groups is displayed, as shown in [Figure 10.19](#).



Figure 10.19 Groups List

You can click the name of the group to view the selection criteria, as shown in [Figure 10.20](#).



Figure 10.20 Group Details

To add a new group, click **Add a Contact Group**, as shown in [Figure 10.19](#). The **Add a Group** page is displayed, as shown in [Figure 10.21](#). Enter the following details:

- Name of the group
- Selection criteria
- Specific contacts for the group
- Requirements to pick contacts among all registered ones

The group includes all contacts that you specify individually. Among the rest, only those that satisfy all selection criteria are selected.

**Communications** → [Communications](#) > [View Groups](#) > Add a Group

Save Cancel Preview

**Begin by entering a name for the new group**

Group Name  \*

**Select criteria for this group \***

Contacts  Leads  Employees

Choose specific contacts:  Selected criteria and contacts:

Define criteria to generate a list:

Field  ▼

Operator  ▼

Search Text

From  ▼

-----Search Criteria-----

**Figure 10.21 Adding a Group**

You can include imported contacts, leads, or employees that were imported in the **Contacts**, **Leads**, or **Company** modules, as shown in [Figure 10.22](#). At a particular time, you can import only one of them.

**Communications** → [Communications](#) > [View Groups](#) > Add a Group

Save Cancel Preview

**Begin by entering a name for the new group**

Group Name

**Select criteria for this group \***

Contacts  Leads  Employees

Choose specific contacts:  Selected criteria and contacts:

Define criteria to generate a list:

Field  Operator  Search Text  From  Add >

-----Search Criteria-----

Save Cancel Preview

**Figure 10.22 Adding Recipients That were Imported**

After you have selected your criteria, you can preview the list of group members by clicking **Preview**. The **Group Details** page is displayed, as shown in [Figure 10.23](#).

Records 1 to 4 of 4 total [Previous|Next]

**Preview Group**

Name	Company	Email
1. Seif Eldin Abderahman	Abderahman, Seif Eldin	sdhany@yahoo.com
2. Alireza Alagheband	Mahva Technologies	alireza_alagheband@yahoo.co.uk
3. Jeremy Barsell	Barsell, Jeremy	
4. Alexander Burgess	Burgess, Alexander	alexander@g12systems.com

[Previous|Next] Page  of 1, Items per page:

**Figure 10.23 Group Preview**

Click **Save** to add the new group.

## 10.8 Adding Messages

A message must be used in a campaign. You can draft and save a number of messages in advance and then use them for your campaigns.

Click **Messages** on the module's main menu to view a list of all available campaign messages, as shown in [Figure 10.24](#).

**Communications** → [Communications](#) > Message List


[Add Message](#)      [0](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

My Messages      Records 1 to 1 of 1 total [Previous|Next] ↻

Name ▲	Subject	Description	Entered By	Last Modified
Asha Kadam	Great Price of Softwares from ConcourseSuite		Kadam, Asha	12/21/2007 12:30 AM EST

Next] Page 1 of 1, Items per page: 10 [Go]

**Figure 10.24** Messages List

To view how a message looks to its recipient, click the message name. The **Message Details** page is displayed, as shown in [Figure 10.25](#). Clicking , displays a context menu, which provides options to:

- Modify a message
- Delete a message
- Clone a message

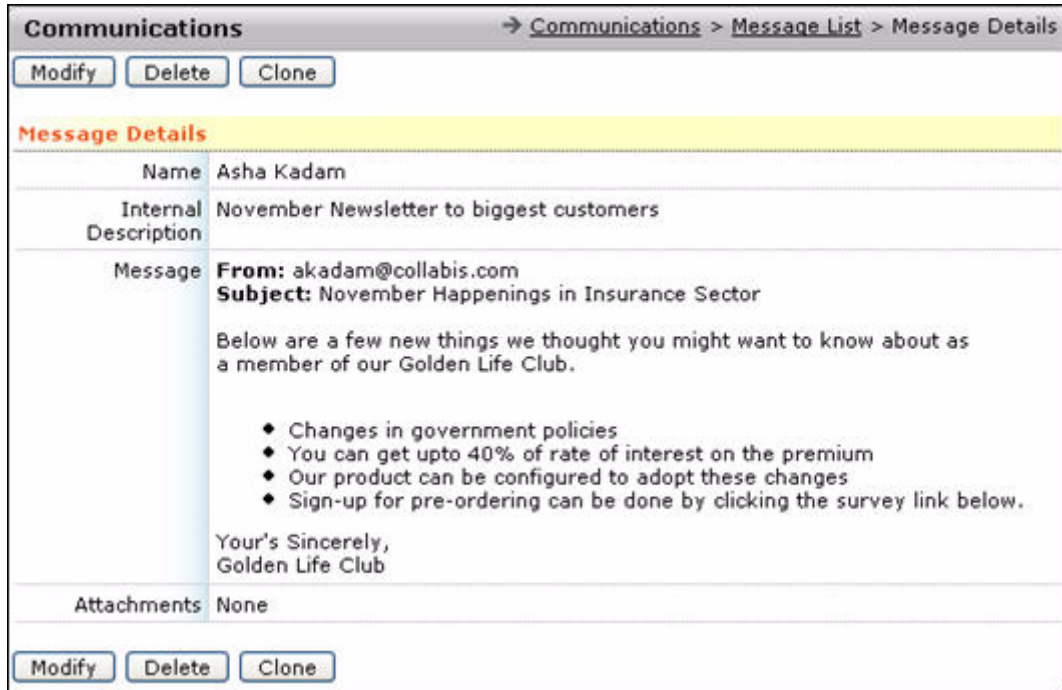


Figure 10.25 Message Details

To add a new message, click the **Add Message** on the **Message List** page, as shown in [Figure 10.24](#). The **New Message** page is displayed, as shown in [Figure 10.26](#). Specify the name, internal description, and access type of the message. You can select from the following access types:

- **Public** - This option allows everyone to use this message while creating campaigns.
- **Personal** - This option allows only you to use the message.
- **Controlled-Hierarchy** - This option allows you to view only those messages that are owned by you, and the ones owned by your subordinates.

You can compose a message and can attach documents to it. For more details, refer to [Section 5.7, "Sending Messages"](#).

**Communications** → [Communications](#) > [Message List](#) > Add Message

Save Message Cancel

**New Message**

Name  \*

Internal Description

Access Type  ▾

Message From:  \* (Email address)

Subject:  \*

**B** *I* U ABC |
 |
 |

Path:

Attachments  [Select] [Clear]

Save Message Cancel

Figure 10.26 The New Message Page

---

**Note:** You must specify the sender's address in the **From** field. Enter the subject of the message and the content. You can use a multi-featured text/HTML editor to make your message more appealing.

---

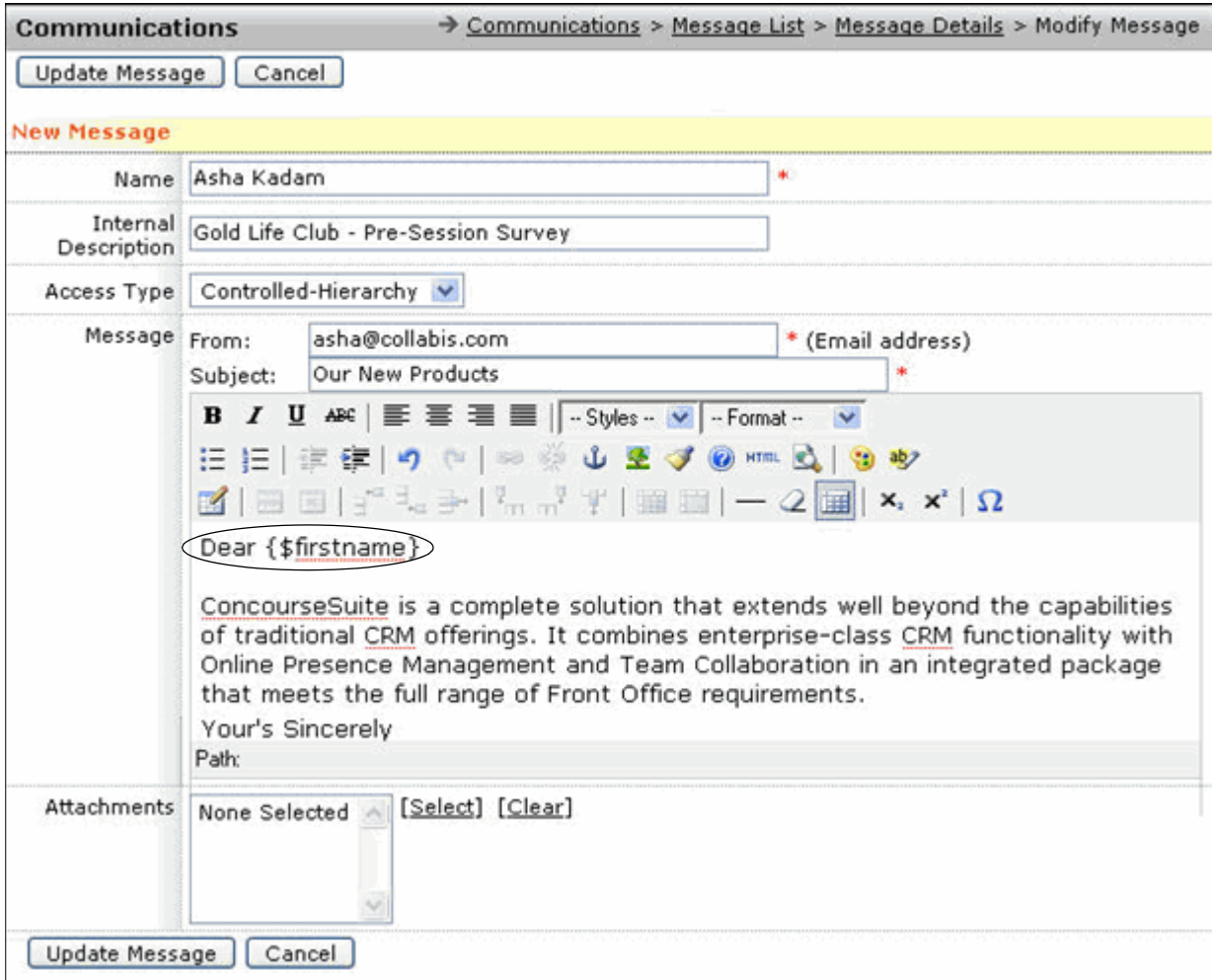


Figure 10.27 Modifying a Message

To personalize your message, you can use some *command* words in the message body, as shown in [Figure 10.27](#). When the message is sent to each individual contact, the *command* words are automatically replaced with the contact's details stored in the database. Following are the *command* words you can use:

- `${name}` - refers to the contact's full name.
- `${firstname}` - refers to the contact's first name.
- `${lastname}` - refers to the contact's last name.
- `${department}` - refers to the contact's department.
- `${company}` - refers to the contact's company.

You could, for example, begin your message with "Dear `${name}`", and finish with "Looking forward to further cooperation with `${company}`". Once you are satisfied with your message, click **Update Message** to save the message and return to the **Message List** page.



## 10.9 Adding Attachments

You can add campaign attachments to make your campaigns informative and to get your customers more involved. You can attach the following items to the campaign:

- Files
- Address update requests
- Unsubscribe option
- Interactive surveys

You can attach files and address update requests to a campaign directly, but you must create drafts to attach surveys.

Click **Attachments** on the module's main menu. The **Create Attachments** page is displayed, as shown in [Figure 10.28](#).



Figure 10.28 The Create Attachments Page

The **Surveys** link enables you to access the available survey list, as shown in [Figure 10.29](#).

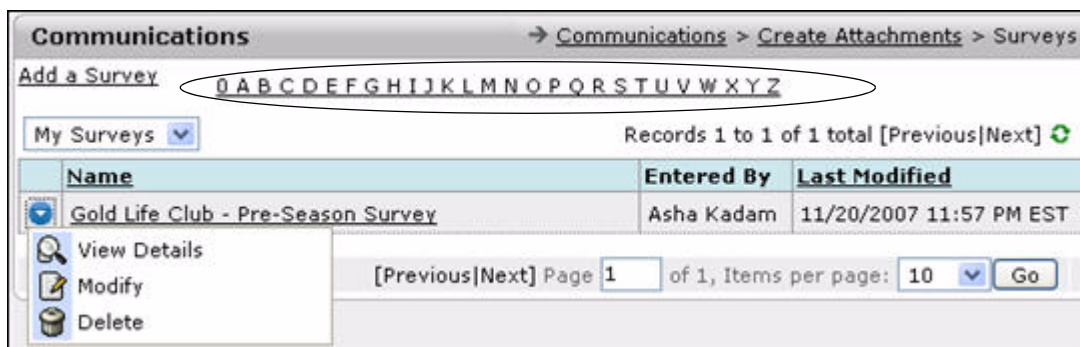


Figure 10.29 Surveys List

When you click a survey name, the survey details page is displayed, as shown in [Figure 10.30](#). The page displays the following information:

- Survey name
- Description
- Creation and modification dates

In the body of the survey, you can view:

- Introduction text
- Questions
- Thank you footer

On the details page, you can perform the following tasks:

- Modify the survey whose details you are viewing
- Delete the survey
- Preview the survey

The screenshot displays a web interface for survey management. At the top, there is a breadcrumb trail: "Communications → Communications > Create Attachments > Surveys > Survey Details". Below this, three buttons are visible: "Modify", "Delete Survey", and "Preview".

The main content is divided into sections:

- Survey Details:** A table with the following information:

Name	Gold Life Club - Pre-Season Survey
Description	Web Survey
Entered By	Asha Kadam
Date	11/20/2007 11:43 PM EST
Last Modified By	Asha Kadam
Date	11/20/2007 11:57 PM EST
- Survey Introduction Text:** A text area containing "Web Survey".
- Survey Questions:** A list of questions with radio button options:
  - 1. Rate your satisfaction
    - 1
    - 2
    - 3
    - 4
    - 5
  - 2. Package
    - 100

Figure 10.30 Survey Details

To add a new survey, click the **Add a Survey** link. An entry form is displayed, as shown in [Figure 10.31](#). Follow the survey wizard to create your survey, by entering the following details:

- Survey name
- Description
- Introduction text
  - This text is displayed when the user clicks the link to take a survey.
- Thank you text

This text is displayed when the user submits the survey.

---

**Note:** Ensure that the introduction text is a concise and catchy introduction to the survey.

---

**Communications** → [Communications](#) > [Create Attachments](#) > [Surveys](#) > Survey Details

< Back   Next >   Save   Cancel

**Step 1: Survey Details**

Name  \*

Description

Introduction Text This is the text the user sees first when they click on the link to take a survey:

Thank You Text This is the text the user sees after they have submitted a survey:

< Back   Next >   Save   Cancel

**Figure 10.31 Survey: Adding a Survey**

Clicking **Next** displays a page that enables you to compose your survey, by adding as many questions as you like. The page displayed is shown in [Figure 10.32](#).

**Communications** → [Communications Manager](#) > [Create Attachments](#) > [Surveys](#) > [Survey Details](#) >

Save & Add   Save   Cancel

**Survey Question**

Question  \*

Question Type  \*

Required

Save & Add

- None --
- Open-Ended
- Quantitative (no comments)
- Quantitative (with comments)
- Item List

**Figure 10.32 Survey: Adding Questions**

To add a question, click the **Add a Question** link. A question template is displayed. Enter the question and select its type from the **Question Type** options, which includes:

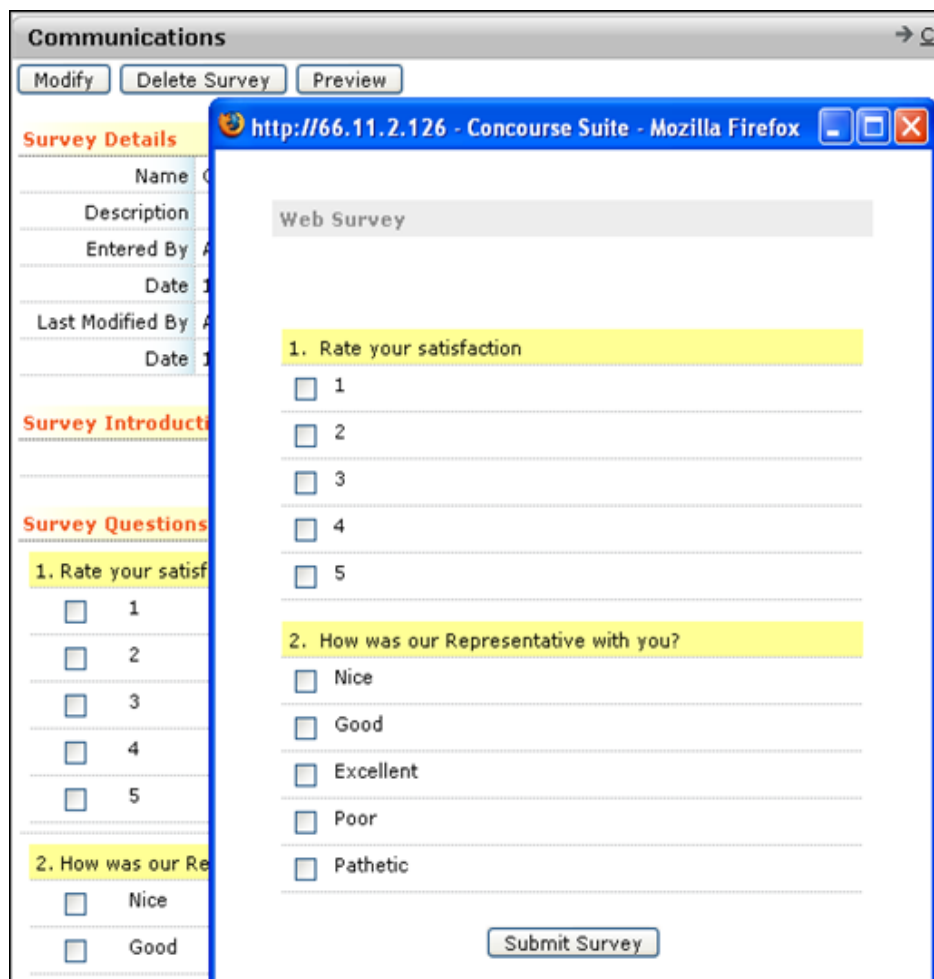
- **Open-Ended** - Selecting this option does not provide choices for the answer. In the open-ended question type, users taking the survey answer the question in their own words.
- **Quantitative (no comments)** - Selecting this option enables the users to select one of the available choices as an answer to the question.
- **Quantitative (with comments)** - Selecting this option enables the users to select one of the available choices as an answer to the question, and make an arbitrary comment.
- **Items List** - Selecting this option enables the users to mark one or more list items as an answer to the question.

---

**Note:** The **Edit Items** tab is enabled for the questions in the items list. Use this tab to list all possible answers you provide to a question.

---

The details of the survey are displayed by clicking **Preview**. The survey details are listed, as shown in [Figure 10.33](#).



**Figure 10.33 Preview a Survey**

To modify the survey, go back to the **Survey Details** page. You can also delete the survey and begin a fresh survey.



## Managing Projects

This chapter provides information on the **Projects** module of ConcourseSuite. This module enables individuals and organizations to share information with each other. This chapter consists of the following sections:

- ❑ [Section 11.1, “How Does This Module Help You?”](#)
- ❑ [Section 11.2, “Viewing New Projects”](#)
- ❑ [Section 11.3, “Adding a Project”](#)
- ❑ [Section 11.4, “Searching for a Project”](#)
- ❑ [Section 11.5, “Accepting Invitations”](#)

### 11.1 How Does This Module Help You?

The **Projects** module facilitates communication between an organization and its customers by allowing information to be accessed by all authorized persons, both internally and externally.

ConcourseSuite **Projects** is a web-based project management application that allows sharing of information with the following personnel:

- Employees
- Clients
- Vendors
- Friends
- Family

The information shared is made easily accessible and secure.

You can create a project by specifying a name, creating news articles, and inviting others to your project. Even if the users are not members of the ConcourseSuite projects, an email message is sent requesting them to join your project. You can access the **Projects** module by clicking the **Projects** tab, as shown in [Figure 11.1](#).

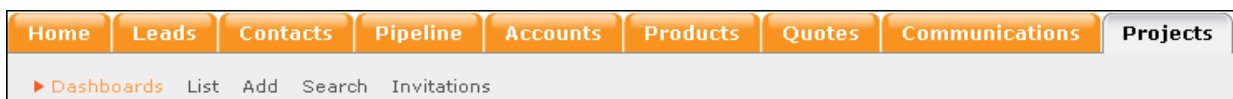


Figure 11.1 The Projects Menu Bar

## 11.2 Viewing New Projects

The following options are available on the menu bar, as shown in [Figure 11.1](#):

- **Dashboards** - This is the default page of the module displaying the module data in a graphical or tabular format.
- **List** - This option lists the projects.
- **Add** - This option enables you to add new projects.
- **Search** - This option enables you to search for a particular project.
- **Invitations** - This option lists the project invitations you have received.

The **Dashboards** page is displayed by default when you click the **Projects** tab, as shown in [Figure 11.2](#). This page displays the most recent activities of the projects, you belong. The default view displays activities of the last 48 hours, but you can select to view activities up to the last 30 days.

A blank list is displayed if there are no activities or projects. If items are displayed, you can view the recent activities for the following items:

- Recent news articles
- Recent messages from the discussion forum
- Recent documents that have been submitted
- Pending activities that are assigned to you
- Tickets that are assigned to you, or are unassigned

Click a project to view its details and **Show More** to view more projects.

Figure 11.2 The Dashboards Page



## 11.2.1 Adding News to a Project

News on the **Dashboards** page lists links displaying the subjects of the posted news articles (for example, Test) and the link in green indicates the project title, as shown in [Figure 11.2](#). Clicking the project title link, displays the **Project Center** page. When you click **News** on this page, a list of news articles is displayed, as shown in [Figure 11.3](#).

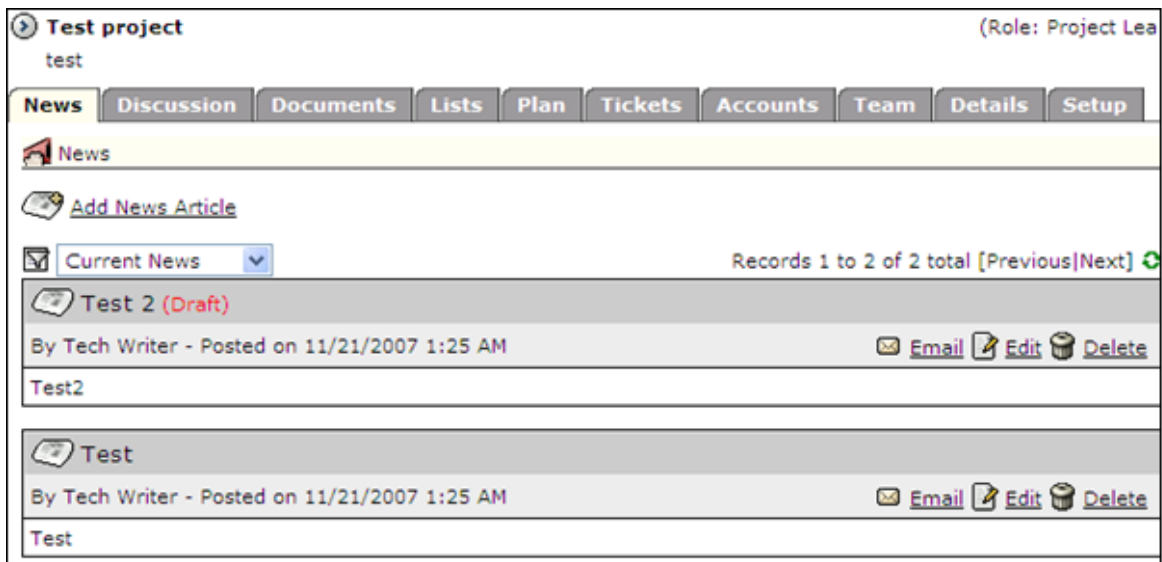


Figure 11.3 The News Page

News articles are bits of news that you can add to your project for others to review. Others can also add news items if you provide access to them to do so.

Click **Add News Article** to add a news article, as shown in [Figure 11.3](#). A form with a set of fields as specified below is displayed, as shown in [Figure 11.4](#).

- **Status** - This field indicates whether the article is displayed when users view news articles. You can select from the following options:
  - **Draft** - Select this option if you have not finished composing the article. You can finish the article later, but it is displayed in the current news list. Other users cannot view this article unless they have access to **Draft** articles.
  - **Unapproved** - Select this option if you have completed the article, but would like the article to be approved before allowing others to view it. You can view this article in your current news list, but others are not able to view unless they have access to **Unapproved** articles.
  - **Published** - Select this option if the article is completed, approved, and ready to be viewed by other users.
- **Position** - This field indicates the order of listing of articles. Articles are displayed in the list by the most recent date first. If you want certain articles to be displayed before the remaining articles, regardless of their date setting, you can group them by position such that lower numbered articles are

displayed before higher numbered articles. By default, 10 is used for all articles, so the articles 1-9 are displayed before 10.

- **Start Date/Time** - This field indicates the specific date and time at which the article is allowed to be viewed.

Prior to this time, only users who can view unreleased articles have access to this article. When the start date/time occurs, the article is displayed in the current news list and the rest of the users in your project, with access to news article list, can view the article.

The screenshot shows a web form titled "News > Add". At the top are three buttons: "Save", "Save and Add a Page", and "Cancel". Below them is a section titled "Add News Article" with a light blue background. The form contains several fields: "Status" with radio buttons for "Draft" (selected), "Unapproved", and "Published (1 Page)"; "Position" with a text input containing "10" and a note "Lower numbered messages appear before higher numbered messages"; "Start Date/Time" with a date input "11/21/2007", time "02:00", and "AM" dropdown, and a "GMT-5 Eastern US" dropdown; "Archive Date/Time" with a date input, time "12:00", "AM" dropdown, and "GMT-5 Eastern US" dropdown; "Category" with a dropdown menu showing "-- None --" and a link "edit list"; "Link to List" with a dropdown menu showing "-- None --"; and "Subject" with an empty text input. At the bottom is a rich text editor with the text "Intro (Page 1)" and a toolbar with various formatting options like bold, italic, underline, and links.

Figure 11.4 Add New Article

- **Archive Date/Time** - This field indicates the specific date and time at which the article should be archived from the default view.  
Users who have access to archived articles are able to review them.
- **Category** - Enables you to specify the category to which the article belongs.
- **Link to List** - Enables you to link the article to a list.
- **Subject** - This field indicates the headline of the article.
- **Intro** - This option displays an introduction to the article.

The user is also given an option to view any additional pages by clicking the **Read more** link that is displayed when an article has additional pages.

After completing the news article and entering all information, click **Save** to save the article. If you wish to add an additional page to the article, click **Save and Add a Page**.

Your article is displayed when you click the **News** tab in your project.

## 11.2.2 Adding Forums

While news articles provide access to information on projects, discussion groups allow informal exchange of information.

Click **Discussion** on the **Project Center** page to view forums for discussing projects.

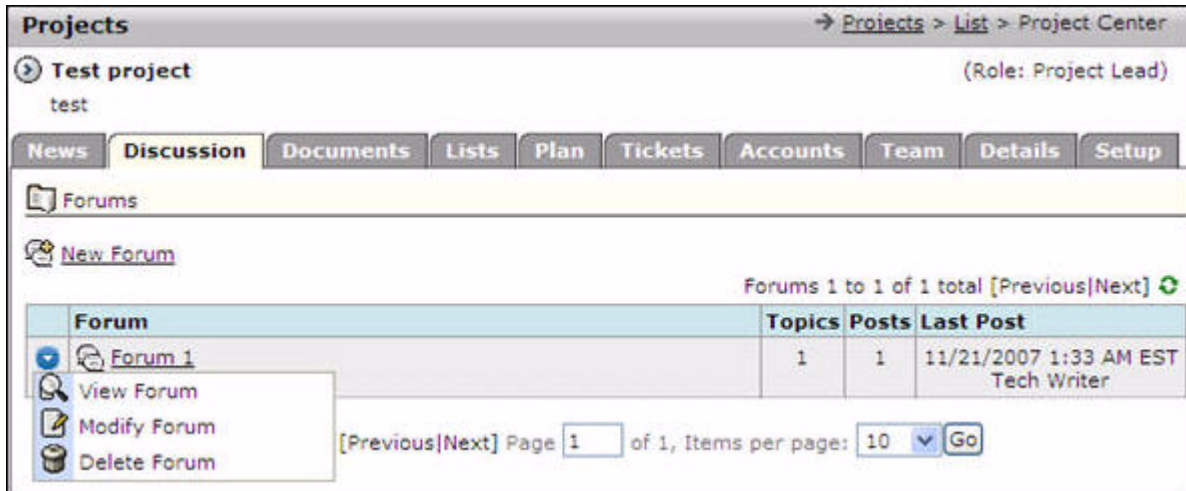


Figure 11.5 The Discussion Page

Discussion groups contain forums, topics, and messages.

Forums provide categorization of the topics being discussed. For example, you can have forums for suggestions, status reports, or resources. Depending on the size of the project, there may be a number of forums. To view a discussion forum, click **View Forum** from the options. You can also modify or delete it, as shown in [Figure 11.5](#).

Once a forum has been created, you need to create a topic for discussion. A topic consists of a subject and a message. Forums may have multiple topics. Click **New Forum** to start a new discussion forum and **New Topic** to add new topic under a particular forum. Once a topic has been posted, other team members can reply to it by clicking **Post Reply**, as shown in [Figure 11.6](#).

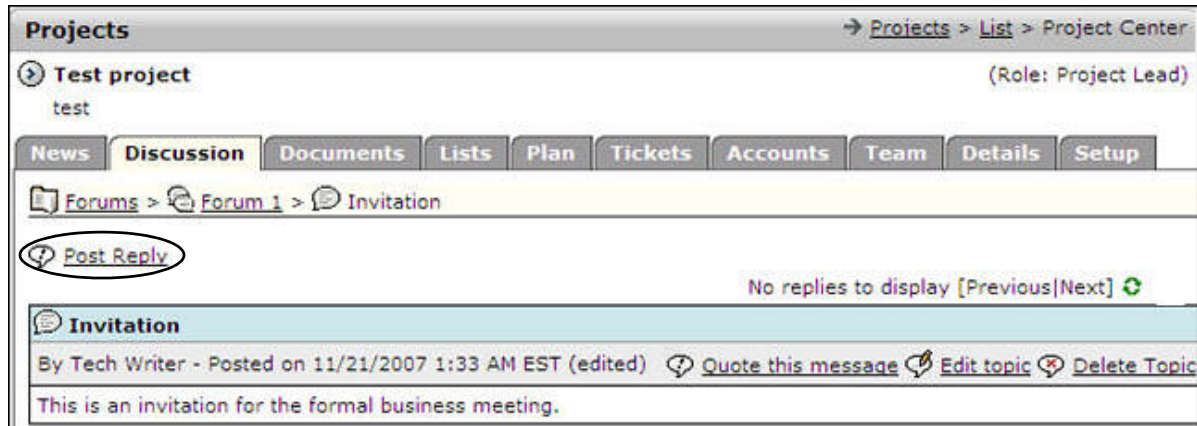


Figure 11.6 Discussion Forum Details

### 11.2.3 Managing Documents

The **Projects** module provides its users with a sophisticated document management tool. This feature enables you to store different versions of documents in a hierarchy of folders. Click **Documents** on the **Projects Center** page to view a list of folders and files that belong to a project, as shown in [Figure 11.7](#).

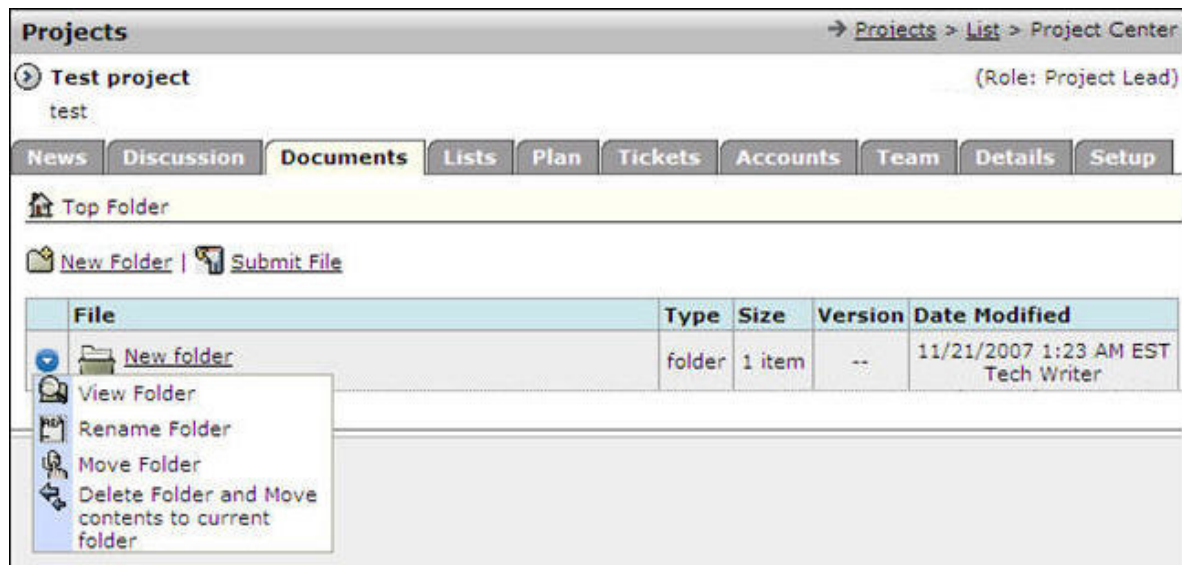


Figure 11.7 The Documents Page

To create a folder, click **New Folder** and to store a file, click **Submit File**. While uploading a file, enter a subject for the file that gets displayed in the list. You can store documents at the top level, or navigate to any available folder and store a file there.

Files existing in the document library are displayed in the list.

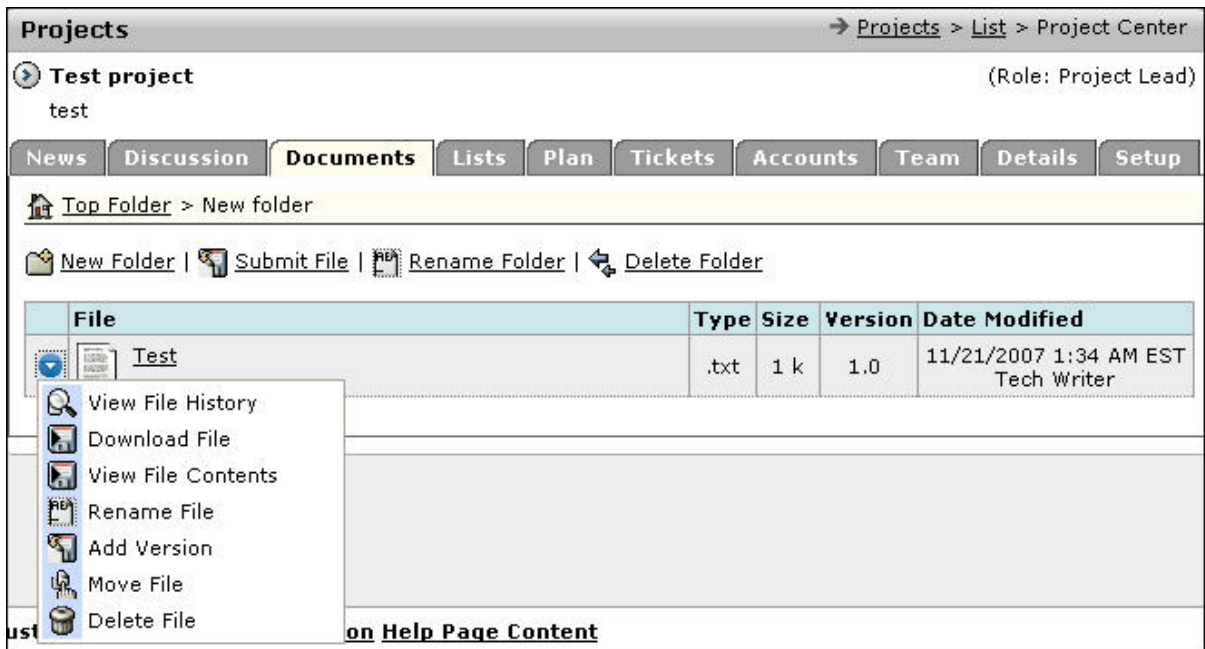



Figure 11.8 File Operations

Clicking , displays a context menu with the following options, as shown in [Figure 11.8](#):

- **View File History** - This option displays the different versions that exist for a file and the number of times each version has been downloaded.
- **Download File** - This option enables you to download files to your computer.
- **View File Contents** - This option displays the files in a pop-up window. Files of following types are displayed:
  - PDF
  - Excel
  - HTML
  - Text
  - Word
- **Rename File** - This option enables you to rename a file.
- **Add Version** - This option enables you to upload a new version of an existing document. The existing file will not be altered, and can be downloaded or deleted separately. Version numbers are indicated as:
  - **Major** - This option indicates that a substantial amount of content has been added or modified.
  - **Minor** - This option indicates that some amount of content has been added or modified.

- **Changes** - This option indicates that small amount of content has been added or modified.
- **Move File** - This option allows you to move the file to another folder.
- **Delete File** - This file enables you to delete the file and all versions of the file.  
To delete only the version of the file, click **View File History** for additional options.

On this history page, you can perform:

- Add a new folder
- Submit a file to a folder
- Rename a folder
- Delete a folder

## 11.2.4 Viewing Lists

**Lists** allows you to place items in a list that can be marked incomplete or complete. You can note down related items to be referenced later.

Projects can contain any number of lists and each list can contain any number of items. An item on the list can also contain a memo area.

List	Items	Last Post
List 1	4	11/21/2007 1:35 AM EST

Figure 11.9 The Lists Page

Click **Lists** on the **Project Center** page to view the lists page, as shown in [Figure 11.9](#). Click **New List** located at the top of the page to add a new list. A page to add lists is displayed, as shown in [Figure 11.10](#).

Figure 11.10 Adding a List

Enter the name for the list and click **Save**.

### 11.2.5 Adding Plans

The **Plan** feature help in creating a high-level view of project objectives as well as providing low-level details. Click **Plan** from the **Project Center** page. You must always start the plan with an outline.

**Outlines** is used to organize objectives for the project. Click **New Outline** to create an outline. A page with the following details is displayed, as shown in [Figure 11.11](#):

- **Title** - This field describes the project objective.
- **Details** - A text describing the goals of the outline is displayed.  
The outline may contain activities and assignments.
- **Requested by** - This field indicates the person who might have initiated the plan.
- **Department or Company** - This field indicates the name of the organization that might have initiated the plan.
- **Expected Dates** - This field indicates the date on which the plan is expected to begin and the date on which it is expected to be completed.
- **Level of Effort** - This field indicates an estimated time for completion of the objective, and the actual time taken for completion.
- **Status** - This field indicates whether the outline is approved and/or closed (complete).

News	Discussion	Documents	Lists	<b>Plan</b>	Tickets	Accounts	Team	
Outlines > Add								
<input type="button" value="Save"/> <input type="button" value="Cancel"/>								
<b>Add Outline</b>								
Title	<input type="text"/>							
Details	<input type="text"/>							
Requested By	<input type="text"/>							
Department or Company	<input type="text"/>							
Expected Dates	Start:	<input type="text"/>	<input type="text"/>	GMT-5 Eastern US	<input type="button" value="v"/>			
	Finish:	<input type="text"/>	<input type="text"/>	GMT-5 Eastern US	<input type="button" value="v"/>			
Level of Effort	Estimated:	<input type="text"/>	Minute(s)					<input type="button" value="v"/>
	Actual:	<input type="text"/>	Minute(s)					<input type="button" value="v"/>
Status	<input type="checkbox"/> Outline Approved							
	<input type="checkbox"/> Outline Closed							
<input type="button" value="Save"/> <input type="button" value="Cancel"/>								

**Figure 11.11 Creating a New Outline**

After entering all the fields, click **Save** to save the outline.

Once you have created the outline, an item in the list with a progress of zero (0) activities is displayed.

Clicking  displays the context menu. You can view the outline details by clicking **View Outline Details** from this menu, or by clicking the name of the outline in the list, as shown in [Figure 11.12](#).



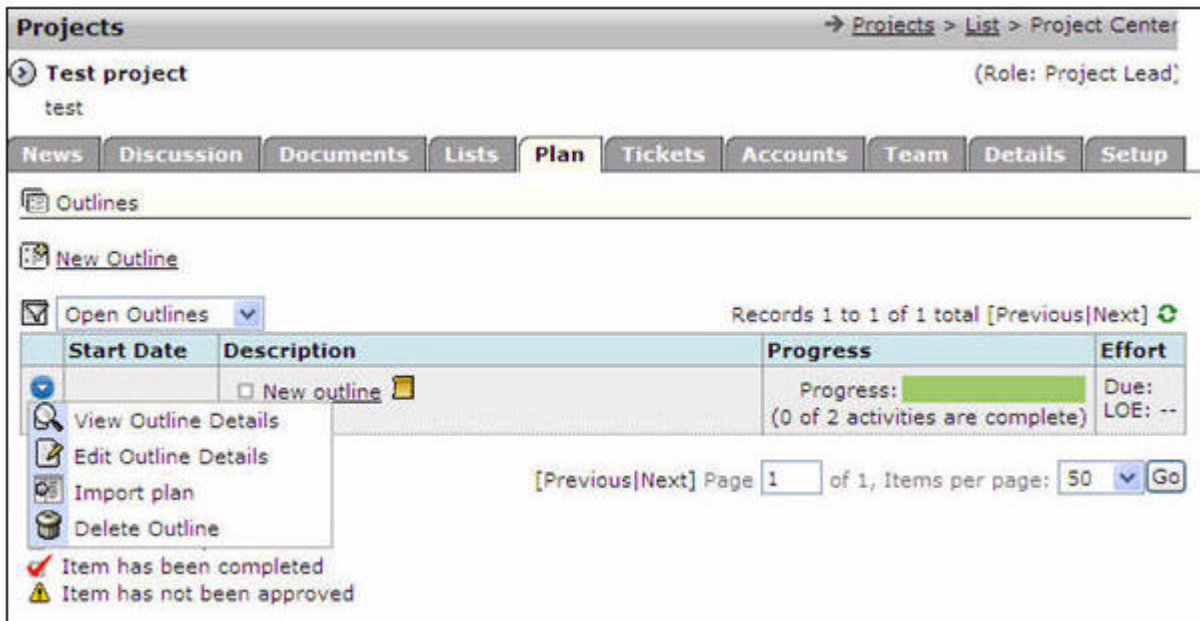


Figure 11.12 Plan Outline

The **Plan Outline** page is displayed, as shown in [Figure 11.13](#). Clicking the name of the outline displays a context menu which provides you with the following options:

- **View Outline Details** - to view the details of the outline.
- **Add Activity Folder** - to add a folder to group the activities.
- **Add an Activity** - to add activities. For more details, refer to [Section 11.2.5.1, "Adding Activities"](#).

An activity folder enables you to create sections in your outline, as shown in [Figure 11.13](#). This is useful while building an outline without deciding how to group activities.

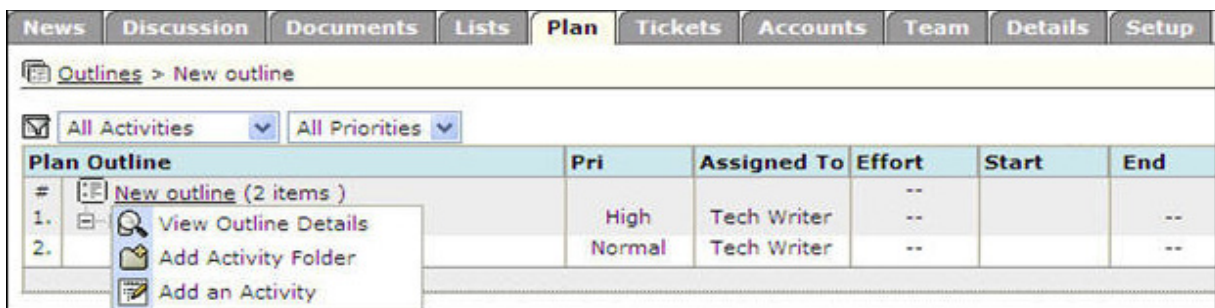


Figure 11.13 Options for Outlines

### 11.2.5.1 Adding Activities

Clicking **Add an Activity** displays a pop-up window, as shown in [Figure 11.14](#), wherein you can enter:

Add an Activity	
Description	<input type="text"/>
Indent Level	-1 <input type="button" value="←"/> <input type="button" value="→"/>
Priority	Normal <input type="button" value="v"/>
Keywords	<input type="text"/>
Assignment	
Assigned To	-- None Selected -- <input type="button" value="v"/>
Level of Effort	Estimated: <input type="text"/> Minute(s) <input type="button" value="v"/> Actual: <input type="text"/> Minute(s) <input type="button" value="v"/>
Start Date	<input type="text"/> <input type="button" value="calendar"/>
Due Date	<input type="text"/> <input type="button" value="calendar"/> GMT-5 Eastern US <input type="button" value="v"/>
Progress	
Status	Not Started <input type="button" value="v"/> 0% <input type="button" value="v"/>
Additional Note	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

Figure 11.14 Add an Activity Window

- Add an Activity
  - **Description** - A brief description that indicates a specific task that needs to be completed.
  - **Indent Level** - This field indicates the level of items.  
As the outline is hierarchical, each item on the outline can be moved to the left or right.
  - **Priority** - The importance of this activity can be specified as:
    - ◆ Low
    - ◆ Normal, which is the default
    - ◆ High
  - **Keywords** - This option contains additional words to track activities.
- Assignment
 

The **Assignments** section enables you to enter the following details:

  - **Assigned to** - This option enables you to assign an activity to any member of the project.
  - **Level of Effort** - This field indicates the estimated time taken for this activity to be completed and the actual time taken for completion of the activity.

- **Start Date** - This field indicates the date on which this activity began.
- **Due Date** - This field indicates the date by which this activity is to be completed.
- Progress
 

The **Progress** section indicates the status of the activity and enables you to enter any additional notes. **Status** describes the state of this activity as:

  - **Not Started** - indicates that this activity has not yet started.
  - **In Progress** - indicates that this activity has started, but is still in progress.
  - **Complete** - indicates that the activity is complete.
  - **Closed** - indicates that the activity is not completed, but the activity may no longer be necessary.
  - **On Hold** - indicates that this activity is waiting on some other factor.
  - **Waiting on Requirements** - indicates that more information is needed in order to complete this activity.

When all information on the activity has been recorded, select **Save** or **Save & New**.

**Save** records the activity and refresh the outline. **Save & New** records the activity, refresh the outline, and provides another form to continue adding activities.

Once an activity is added to the list, you can select from the following options:

- **Add Activity Folder** - This option enables you to add an activity folder.
- **Add Activity** - This option enables you to add another activity below the existing one.
- **View/Update This Activity** - This option enables you to modify the activity depending on your permissions, and whether the activity is assigned to you. Otherwise you are allowed to view the activity without making any changes.
- **Delete Activity** - This option enables you to delete an activity.

You also have the option of moving the activity item up and down the list, or indenting the activity to the left and right.

## 11.2.6 Adding Tickets

Once the project starts, there might be some unexpected issues that need to be recorded and resolved. The **Tickets** feature helps you capture these issues.

Tickets indicates issues that can be assigned to a team member. A list of tickets associated with a project is shown in [Figure 11.15](#).

Click **New Ticket** on the **Project Center** page to add a new ticket.

**Projects** → [Projects](#) > [List](#) > Project Center

Test project (Role: Project Lead)  
test

News Discussion Documents Lists Plan **Tickets** Accounts Team Details Setup

Tickets

[New Ticket](#)

Open Tickets Tickets 1 to 1 of 1 total [Previous|Next] ↻

	<b><u>Id</u></b>	<b><u>Status</u></b>	<b><u>Issue</u></b>	<b><u>Priority</u></b>	<b><u>Assigned To</u></b>	<b><u>Age</u></b> ▲	<b><u>Last Modified</u></b>
<input checked="" type="checkbox"/>	000003	open	test ticket	Next		0d 0h	11/21/2007 5:19 AM EST

[Previous|Next] Page  of 1, Items per page:

Figure 11.15 The Tickets Page

A new page is displayed, as shown in [Figure 11.16](#).

Tickets > Add

Save Cancel

**Classification**

Issue

Severity Normal ▾

**Assignment**

Priority Next ▾

Assign To -- None Selected -- ▾

Estimated Resolution Date  at 12 ▾ : 00 ▾ AM ▾ GMT-5 Eastern US ▾

User Comments

**Resolution**

Solution

Close ticket

Save Cancel

**Figure 11.16 The Add Ticket Page**

The information to be entered on this page can be divided into the following three sections:

- Classifications
- Assignment
- Resolution

### 11.2.6.1 Setting Classifications

The **Classifications** section indicates any issue that has come up. The issue can be a request for information or a problem that has occurred.

The severity of the issue, which describes the impact on the project, can be selected from the following options:

- Normal
- Important
- Critical

### 11.2.6.2 Adding Assignments

The **Assignments** tab indicates the date by when the issue is to be resolved. You can select from the following options in the **Priority** field:

- **As Scheduled** - This option enables the team member assigned to take care of the issue whenever convenient.
- **Next** - This option enables the team member assigned to take care of this issue ahead of other lower priority items.
- **Urgent** - This option enables the team member assigned to take care of this issue as soon as possible because the impact is severe.
- **Critical** - This option enables the team member assigned to take care of this issue immediately because the impact is severe.

You may enter the following information:

- **Assign To** - This field displays the team member who has been assigned this ticket.
- **User Comments** - This field displays any additional comments that are not part of the issue.

A ticket can have any number of comments. Each comment is dated and attributed to the user who made a comment and is later displayed in the ticket history.

- **Estimated Resolution Date** - This field displays the date by which this issue is expected to be resolved.

### 11.2.6.3 Adding Resolution

The **Resolution** tab displays the solution to the ticket. The solution is a description of how the ticket was resolved.

### 11.2.6.4 Closing a Ticket

You can select the **Close Ticket** option located at the bottom of the **Add Ticket** page, as shown in [Figure 11.16](#). This indicates that the ticket is complete and needs no further action.

Once added, the details of the ticket can be reviewed. A ticket also contains a history in which you can view the progress or escalation that has occurred with the ticket.

Once a ticket has been closed, you can re-open the ticket later, if necessary.

## 11.2.7 Associating Accounts

You can associate an account to a project using the **Accounts** tab. Click **Accounts**. The **Accounts** page is displayed, as shown in [Figure 11.17](#).

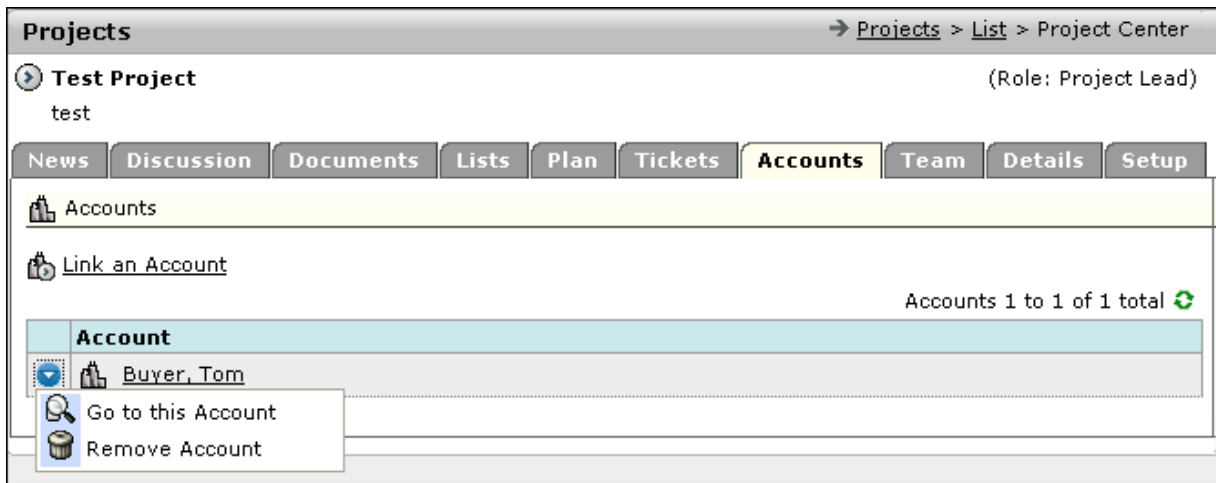


Figure 11.17 Accessing the Accounts Page

Click **Link an Account** to associate an **Account** to this project. A pop-up window enabling you to select the **Account** is displayed, as shown in [Figure 11.18](#). Click **Select** beside the account name to select the account, as shown in [Figure 11.18](#) or click **Cancel** to cancel the operation.

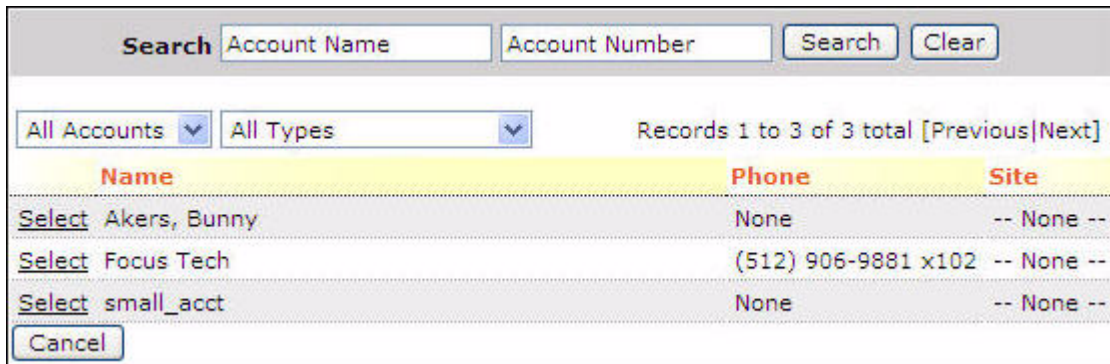


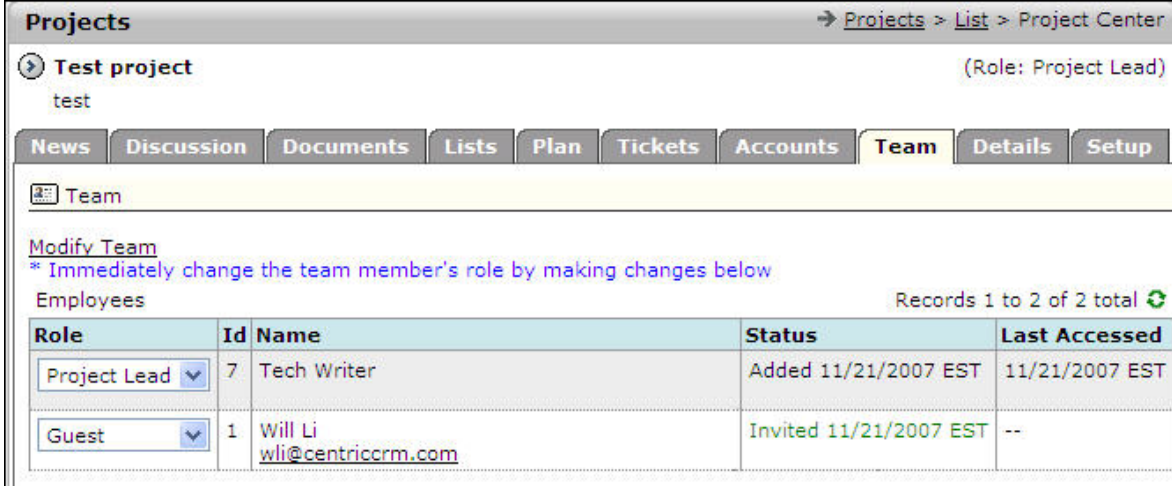
Figure 11.18 Selecting an Account

## 11.2.8 Organizing Teams

After configuring the project and adding news article, you need to add contacts to your projects.

Click the **Team** tab. The **Team** page is displayed, as shown in [Figure 11.19](#). The first page displays a list of currently added team members and some information about them. Your name is added automatically when you create a new project.

To add team members, click the **Modify Team** link. The **Modify Team** page is displayed, as shown in [Figure 11.20](#).



**Projects** → [Projects](#) > [List](#) > Project Center

Test project (Role: Project Lead)

test

News Discussion Documents Lists Plan Tickets Accounts **Team** Details Setup

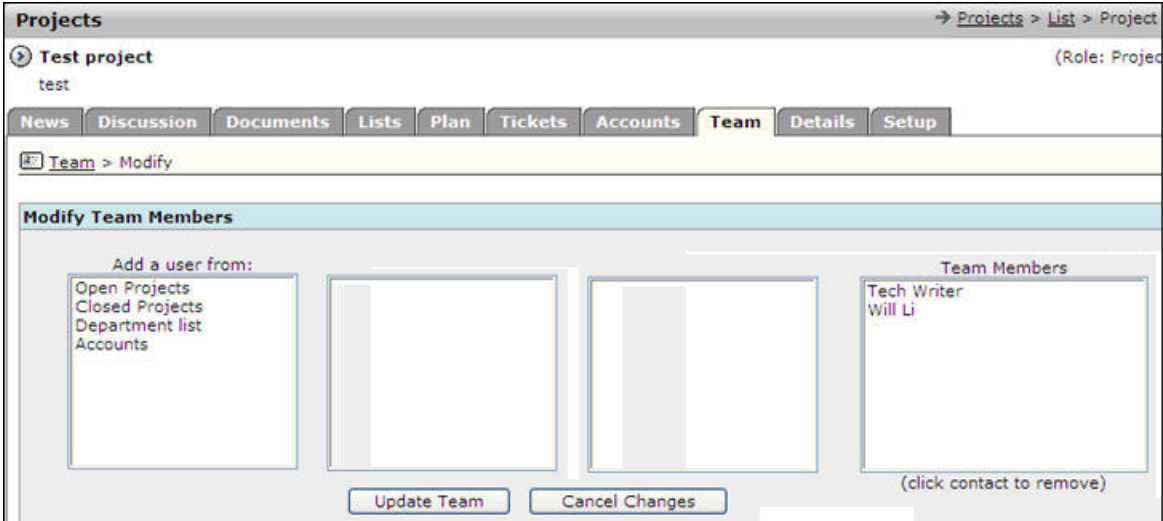
Team

[Modify Team](#)  
\* Immediately change the team member's role by making changes below

Employees Records 1 to 2 of 2 total

Role	Id	Name	Status	Last Accessed
Project Lead	7	Tech Writer	Added 11/21/2007 EST	11/21/2007 EST
Guest	1	Will Li <a href="mailto:wli@centriccrm.com">wli@centriccrm.com</a>	Invited 11/21/2007 EST	--

Figure 11.19 The Teams Page



**Projects** → [Projects](#) > [List](#) > Project

Test project (Role: Project)

test

News Discussion Documents Lists Plan Tickets Accounts **Team** Details Setup

Team > Modify

**Modify Team Members**

Add a user from:

- Open Projects
- Closed Projects
- Department list
- Accounts

Team Members

- Tech Writer
- Will Li

(click contact to remove)

Update Team Cancel Changes

Figure 11.20 Modify Team

A page with list boxes, some of which are empty, is displayed. The list on the extreme right shows you the team members of your project. The list on the far left displays channels through which you can add team members.



---

---

**Note:** For more details, refer to [Section 13.5.3, “Viewing Team Page”](#).

---

All added team members are initially identified as **Invited**. This indicates that you want them to be on this project, but want them to inform you of this action. You want the team members to login to ConcourseSuite **Projects** to accept the invitation. If the team members do not have an account, they receive an email that allows them to register with ConcourseSuite **Projects** before accepting your invitation.

Team members can be added from the following projects:

- **Open Projects** - This option enables you to add contacts from your existing projects.
- **Closed Projects** - This option enables you to add contacts from your closed projects.
- **Department List**- This option enables you to add the contacts from the various departments.
- **Accounts** - This option enables you to add the contacts associated with accounts.

After selecting a contact, ensure the selected contact is displayed in the list before continuing. To remove team members from your project, select the contacts from the right column and they are removed when the team is updated.

After modifying the team, click **Update Team** to commit the changes. If you have added a contact by email address, and ConcourseSuite **Projects** is not familiar with that address, you will be asked if you are certain you would like to invite the contact to the project. If you select **Yes**, you must enter the first and last names of the contact.

When contacts are added to a project, whether they are users of ConcourseSuite or not, an email is sent to each contact inviting it to your project. When you view the users, you can modify their role in the project by selecting from the options next to their names. The system immediately updates the users' role after modifying the same.

## 11.2.9 Viewing Details

The **Details** tab displays the details of a project, as shown in [Figure 11.21](#).

**Projects** → [Projects](#) > [List](#) > Project Center

⊙ **Test project** (Role: Project Lead)  
test

News Discussion Documents Lists Plan Tickets Accounts Team **Details** Setup

Overview

[Modify Project](#) | [Delete Project](#)

General Information	
Status	This project was approved on 11/21/2007 1:21 AM EST
Title	Test project
Short Description	test
Start Date	11/21/2007 1:20 AM EST
Estimated Close Date	12/21/2007 12:00 AM EST
Requested By	ABC
Organization	Focus tech
Budget	\$200,000.00
Entered	Tech Writer 11/21/2007 1:21 AM EST
Modified	Tech Writer 11/21/2007 1:21 AM EST

**Figure 11.21 The Details Page**

The following fields are displayed:

- **Status** - indicates whether the project is pending for approval or cleared.
- **Title** - displays the name of the project.
- **Short Description** - displays a brief description of the project.
- **Start Date** - displays the date on which the project began.
- **Estimated Close Date** - displays the date by which the project is expected to close.
- **Requested by** - displays the name of the person who requested the project.
- **Organization** - displays the name of the organization to which the person who requested the project belongs.
- **Budget** - indicates the monetary funds set aside for the project.
- **Entered and Modified** - indicates the date and time the project was entered and last modified. It also displays the name of the person who modified the project.

When you click **Modify Project**, you are navigated to a form where you change the project data. After you have made modifications, click **Update** to save the changes or **Cancel** to return to the previous screen.

To delete a project, click **Delete Project** shown in [Figure 11.21](#).

## 11.2.10 Managing the Setup

As the project lead, you have access to the **Setup** tab. By clicking **Setup**, you can configure some of the administrative tasks associated with the project. The following links are displayed under the **Setup** tab:

- Customize Project
- Configure Permissions

In **Customize Project**, if you are a leader of this project, you can decide which tabs are needed for the project and what the tabs should be called. Changing the names of the tabs does not change any of the existing functionality for that tab. Turning off the tabs can be helpful if you do not intend to have any information under that tab.

If you want to leave the tabs with their default settings, click **Cancel**.

## 11.2.11 Setting Up Project Permissions

Within the **Setup** tab, you also have the choice to configure permissions for a project. Permissions allow you to define what members of your project can be allowed to view, add, change, or delete. When you add users to your project, you need to decide which part of the project each user can access.

**Projects** has pre-configured a few types of users, called Roles. Each role has a different set of permissions. The roles are as shown in [Figure 11.22](#). The roles and their definitions are specified below:

- **Project Lead** - The owner or manager of the project who has control of the project data.  
The project lead is allowed to configure the project and add, update, and delete project information. There may be multiple owners or managers for a project.
- **Contributor** - The person responsible for adding or updating project information.
- **Observer** - The person who is allowed to review the project.  
The observer has read access and is allowed to add or update project-related information.
- **Guest** - A user who has a read-only role.  
A guest is a person who is not directly part of the project, but can view some of the project information.

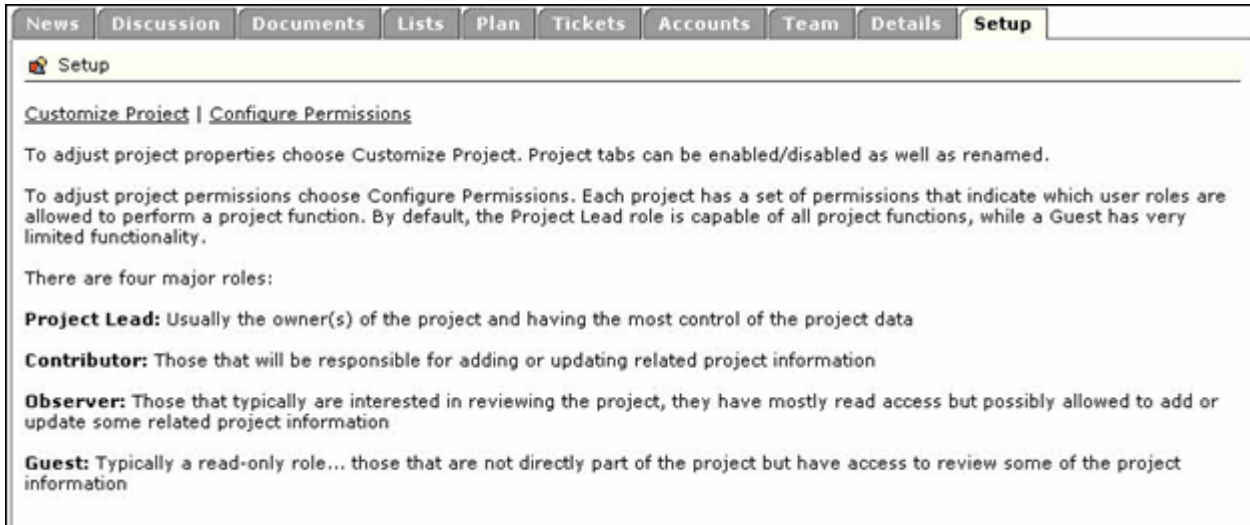


Figure 11.22 File Setup

---

**Note:** Every user added to the project is assigned a role and is provided certain capabilities within the project.

---

## 11.2.12 Configuring Permissions

A list of all permissions that can be adjusted in a project is shown in [Figure 11.23](#). Each tab has a variety of permissions that can be adjusted.

**Projects** → [Projects](#) > [List](#) > Project Center

⊙ **Test Project** (Role: Project Lead)  
test

News Discussion Documents Lists Plan Tickets Accounts Team Details **Setup**

🔗 [Setup](#) > Configure Permissions

Update Cancel

Permissions	
<b>Project Details</b>	Lowest Role
View project details	Guest ▼
Modify project details	Project Lead ▼
Delete project	Project Lead ▼
<b>Team Members</b>	Lowest Role
View team members	Guest ▼
See team member email addresses	Observer ▼
Modify team	Project Lead ▼
Modify team member role	Project Lead ▼
<b>News</b>	Lowest Role
View current news	Guest ▼
View unreleased news	Contributor ▼
View archived news	Observer ▼
Add news	Contributor ▼
Edit news	Contributor ▼
Delete news	Guest ▼
<b>Plan/Outlines</b>	Lowest Role
View outlines	Guest ▼
Add an outline	Project Lead ▼
Modify details of an existing outline	Project Lead ▼

**Figure 11.23 Project Permissions**

For example, the first group **Project Details** contains the following permissions that can be adjusted:

- **View project details** - defines which role can view the project details.
- **Modify project details** - defines which role can modify the project details.
- **Delete project** - defines which role can permanently delete a project.

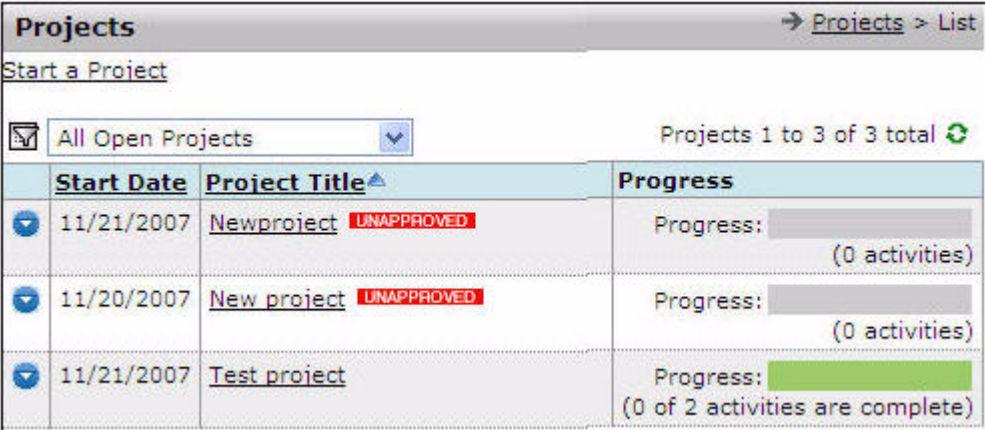
---

**Note:** Avoid further configuration and make use of defaults until you have understood the permissions of each project tab well.

---

## 11.3 Adding a Project

Clicking **List** from the menu bar, displays the **List** page, as shown in [Figure 11.24](#), with a list of all your projects for review.



	Start Date	Project Title	Progress
<input type="checkbox"/>	11/21/2007	Newproject <b>UNAPPROVED</b>	Progress: (0 activities)
<input type="checkbox"/>	11/20/2007	New project <b>UNAPPROVED</b>	Progress: (0 activities)
<input type="checkbox"/>	11/21/2007	Test project	Progress: (0 of 2 activities are complete)

**Figure 11.24** The List Page

You can add a new project by clicking **Start a Project** on the **List** page or by clicking the **Add** link on the menu bar. The **New Project Information** page is displayed, as shown in [Figure 11.25](#).

Projects	
New Project Information	
Title	<input type="text"/> *
Short Description	<input type="text"/> *
Start Date	11/21/2007  at 05 <input type="text"/> : 55 <input type="text"/> AM <input type="text"/> GMT-5 Eastern US <input type="text"/> *
Estimated Close Date	<input type="text"/> at 12 <input type="text"/> : 00 <input type="text"/> AM <input type="text"/> GMT-5 Eastern US <input type="text"/>
Requested By	<input type="text"/>
Organization	<input type="text"/>
Budget	USD <input type="text" value="0"/>
Status	<input type="checkbox"/> Approved <input type="checkbox"/> Closed
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 11.25 Add Project**

Enter your new project information in the following fields:

- **Title** - refers to a brief name for your project.
- **Short Description** - refers to a brief description of your project.
- **Start Date** - refers to the date on which the project started or will start.
- **Estimated Close Date** - refers to the date on which you intend to finish the project.
- **Requested By** - refers to the person who might have initiated the project. It could be the name of a client.
- **Organization** - refers to the organization that might have initiated the project. It could be the name of a company.
- **Budget** - refers to a high-level view of the project budget. This figure generally is an estimate.
- **Status** - displays whether the project has been approved or closed (finished).

After the details have been entered, click **Save**. The new project is created. The **Project Center** page is displayed, as shown in [Figure 11.26](#). This page displays information about your new project.

Initially, you are the only member of the project, and no one else has access to it. You can then configure the project and enter additional project information.

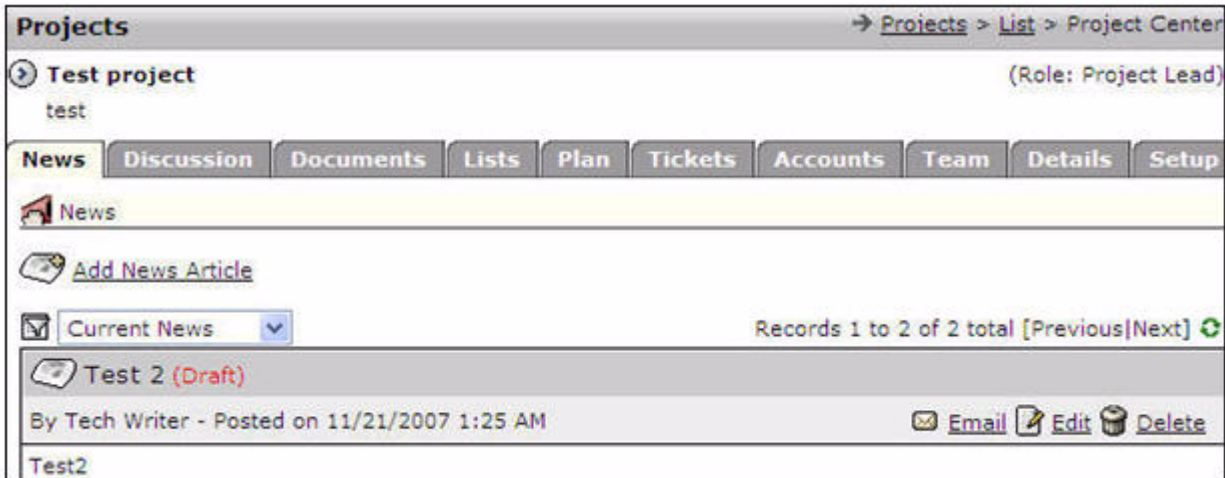


Figure 11.26 The Project Center Page

## 11.4 Searching for a Project

Click **Search** from the menu bar to look for a particular project, as shown in [Figure 11.27](#).

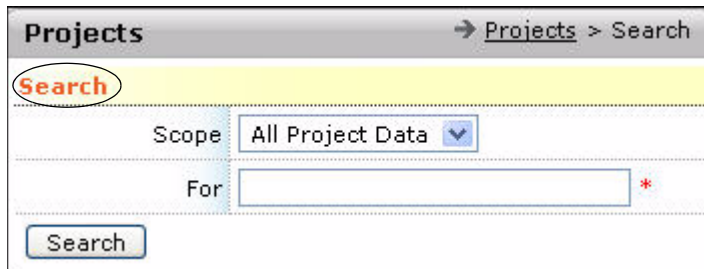


Figure 11.27 Search Project Data

The **Scope** field provides the following options to broaden or narrow down your search:

- All Project Data
- Discussion
- Documents
- Lists
- Tickets
- Plan
- Details

If you select **All Project Data**, a complete list of all projects is displayed. If you select **Documents**, a complete list of all documents is displayed, as shown in [Figure 11.28](#).



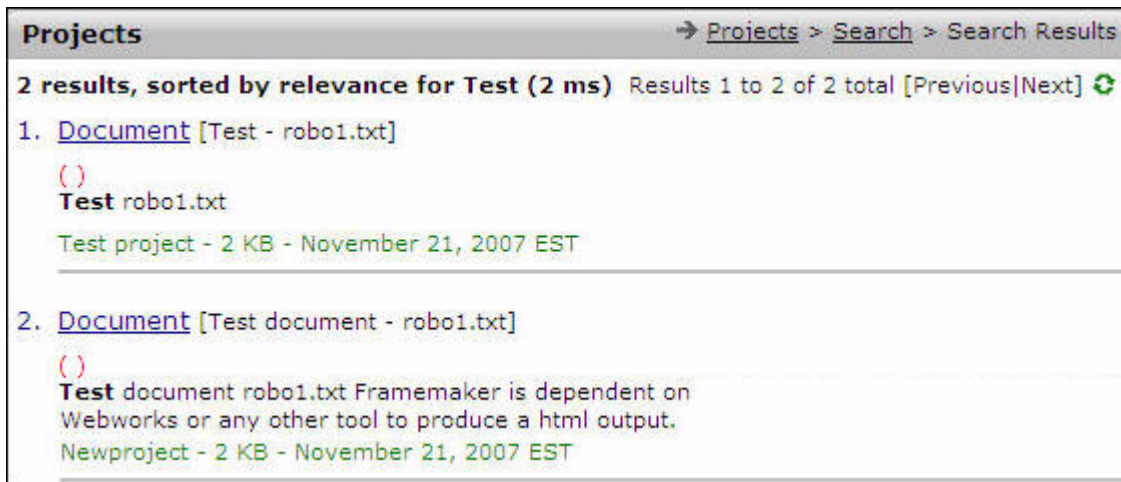


Figure 11.28 The Search Results Page

## 11.5 Accepting Invitations

The **Projects** module hosts projects for a large number of users. If you are invited to a project, you will receive a message by email prompting you to accept or reject the invitation.

You can view your pending invitations by clicking **Invitations** from the menu bar. Any unanswered invitations are displayed in parentheses after the link.

When you have invitations, the list displays each project to which you have been invited, as well as the person who invited you. Click **Accept** to join the project, or **Reject** to reject the invitation. You can view the project in detail only after accepting to join the project.

### 11.5.1 Closing a Project

When you want to close the project, click the **Details** tab and modify the project. Indicate the status as **Closed**. For more details, refer to [Section 11.2.9, "Viewing Details"](#). A closed project can be re-opened if necessary, but the closed project will be removed from the project list. If you want to view closed projects, click **Closed Projects** in your list.



## Accessing the Help Desk

This chapter provides information about the **Help Desk** module of ConcourseSuite. This module helps you solve customer problems with tickets that track issues from beginning to end.

This chapter consists of the following sections:

- ❑ [Section 12.1, “How Does This Module Help You?”](#)
- ❑ [Section 12.2, “Viewing the Help Desk Dashboards Page”](#)
- ❑ [Section 12.3, “Accessing the View Tickets Page”](#)
- ❑ [Section 12.4, “Creating a New Ticket”](#)
- ❑ [Section 12.5, “Viewing Ticket Details”](#)
- ❑ [Section 12.6, “Searching for a Ticket”](#)
- ❑ [Section 12.7, “Adding Defects”](#)
- ❑ [Section 12.8, “Understanding Knowledge Base”](#)

### 12.1 How Does This Module Help You?

The **Help Desk** module is a web-based trouble ticketing and issue tracking system that enables individuals and organizations to track internal problems, or customer problems and requests. You can use it to store information about a customer issue, assign it to concerned person for action, and track it to completion.

It is designed for technical support, but is also useful in marketing, sales, and business development situations. With the Portal Interface, customers can even enter and view their own information.

### 12.2 Viewing the Help Desk Dashboards Page

The **Help Desk** module can be accessed by clicking the **Help Desk** tab. The **Help Desk** menu bar is displayed, as shown in [Figure 12.1](#).



Figure 12.1 The Help Desk Menu Bar

The **Dashboards** page is the default page in the **Help Desk** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 12.3 Accessing the View Tickets Page

The basic unit of information in a help desk is a ticket. A ticket is a problem or request. It can be entered into the system in different ways, from someone in your organization or from a person with a problem or request.

Click **View** to access the **View Tickets** page. This page is divided into the following sections:

- **Tickets Assigned to Me**
- **Other Tickets in My Department**
- **Tickets Created by Me**
- **All Tickets**
- **Assigned to One of My Groups**

You can select to view only those tickets that are relevant to you, as shown in [Figure 12.2](#).

Help Desk <span style="float: right;">→ <a href="#">Help Desk</a> &gt; View Tickets</span>						
<b>Tickets Assigned to Me</b> ( <a href="#">Show More</a> )				No records to display		
Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned	
No tickets found						
<b>Other Tickets in My Department</b> ( <a href="#">Show More</a> )				Records 1 to 2 of 2 total		
Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned	
000003	Next		0d 21h	Focus Tech	-- unassigned --	
new ticket [ <a href="#">open</a> ]						
000001	Next		6d 3h	Concursive Corp	-- unassigned --	
Bug in CRM [ <a href="#">open</a> ]						
<b>Tickets Created by Me</b> ( <a href="#">Show More</a> )				Records 1 to 1 of 1 total		
Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned	
000001	Next		6d 3h	Concursive Corp	-- unassigned --	
Bug in CRM [ <a href="#">open</a> ]						

Figure 12.2 The Help Desk Main Screen

Click **Show more** to view all tickets in a particular category. To go back to the previous view, click the **Return to Overview** link, as shown in [Figure 12.3](#).

Help Desk <span style="float: right;">→ <a href="#">Help Desk</a> &gt; View Tickets</span>						
<b>Tickets Created by Me</b> ( <a href="#">Return to Overview</a> )				Records 1 to 1 of 1 total [ <a href="#">Previous</a> ] <a href="#">Next</a>		
Number	Priority	Est. Resolution Date	Age	Company	Resource Assigned	
000001	Next		6d 3h	Concursive Corp	-- unassigned --	
<div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;"> <ul style="list-style-type: none"> <li> View Details</li> <li> Modify</li> <li> Delete</li> </ul> </div> <div> <p>[<a href="#">Previous</a>]<a href="#">Next</a>] Page <input type="text" value="1"/> of 1, Items per page: <input type="text" value="10"/> <input type="button" value="Go"/></p> </div> </div>						

Figure 12.3 Specific Ticket List Group

The page displays different columns of information about each ticket:

- Clicking , displays a context menu with the following options, only if you have access to perform these tasks:
  - View details of a ticket
  - Modify a ticket
  - Delete a ticket
- The ticket number which indicates a serial number incremented by one for each new ticket.
- The priority of the ticket.

- The estimated resolution date, if one was entered.
- The current age of the ticket in days and hours, from when it was first opened.
- The company or account to which the ticket refers.
- The person who is assigned the responsibility of resolving the issue.

## 12.4 Creating a New Ticket

To create a new ticket, click **Add** from the menu bar, and the **Add Ticket** page is displayed, as shown in [Figure 12.5](#). The mandatory fields are as listed below:

- **Account** - select an account for which the ticket is created.
- **Contact** - select the contact from the options that reflect the contacts from the organization selected in the **Account** field.
- **Issue** - enter a detailed description of the issue.

Entering data in other fields along with the ones above adds value to the issue tracking and resolution process. The **Add Ticket** page can be categorized into four sections which are discussed in detail in the following sections.

### 12.4.1 Adding New Ticket Information

**Adding New Ticket Information** is the first section on the **Add Ticket** page. The following details can be entered in this section:

- **Ticket source** - enables you to select how the ticket was received:
  - Email
  - Phone
  - Web
  - Letter
- **Service contract number** - enables you to select the customer's contract number.
- **Asset** - enables you to select the asset from the account. Click **Select** to view a list of assets and add new assets. To add an asset, click **Add an Asset**, as shown in [Figure 12.4](#).
- **Labor Category** - enables you to select the category to which the customer belongs.

Figure 12.4 Adding Assets

## 12.4.2 Adding Classification Details

**Adding Classification Details** is the second section on the **Add Ticket** page. The following details can be entered in this category, as shown in [Figure 12.5](#):

- **Location** - enables you to describe the location of the problem.
- **Category** and sub-levels - enables you to describe the issue in detail.
 

The **Category Editor** is found in the **Admin** section. On setting the proper options, ticket assignment can be based on the selected categories. For more details, refer to [Section 12.4.1, "Adding New Ticket Information"](#).
- **Knowledge Base** entries - provide you entries that can be linked to the categories.
 

For a specific set of categories, you can view the knowledge base entries by clicking the **Knowledge Base** sub-tab.
- **Severity** - enables you to organize problems by their importance. You can select from the following options:
  - Normal
  - Important
  - Critical
- **Action Plan** - enables you to establish a specific sequence of steps to fix the problem mentioned in the ticket.

The screenshot shows the 'Add Ticket' page in a Help Desk system. The page title is 'Help Desk' and the breadcrumb trail is 'Help Desk > Add Ticket'. At the top, there are 'Insert' and 'Cancel' buttons. The form is divided into two main sections: 'Add Ticket' and 'Classification'. The 'Add Ticket' section includes the following fields:

- Ticket Source: -- None -- (dropdown)
- Ticket State: -- None -- (dropdown)
- Account: Akers, Bunny \* [Select]
- Contact: Akers, Bunny \* [Create New Contact]
- Service Contract Number: None Selected [Select] [Clear]
- Asset: None Selected [Select] [Clear]
- Labor Category: None Selected [Select] [Clear]

The 'Classification' section includes a large text area for the 'Issue' description, marked with a red asterisk (\*).

Figure 12.5 The Add Ticket Page

### 12.4.3 Adding Assignment Information

The third section on the **Add Ticket** page is **Adding Assignment Information**. The following details can be entered in this category:

- **Priority** - describes how quickly you want the issue to be addressed by your organization. You can select from the following options:
  - Next
  - Critical
  - Urgent
  - As scheduled
- **Department** - displays the department that is responsible for resolving the issue.
- **Resource Assigned** - displays the name of the person responsible for resolving the issue.
- **User Group** - displays the group of users associated to a ticket.
- **Assignment Date** - displays the date on which the issue occurred.
- **Estimated Resolution Date** - displays the date by which the issue is expected to be resolved.

All the fields are important for tracking and reporting.



## 12.4.4 Adding Resolution Information

The next section on the **Add Ticket** page is **Adding Resolution Information**. The following details can be entered in this category:

- **Cause** - describes the cause of the problem.
- **Resolution** - describes the method used to fix the issue.
- **Close Ticket** - enables you to close the ticket.
- **Resolution date** - displays the date on which the issue was fixed.

You must enter as much information as you can to provide a better search, report, and knowledge base data.

---

**Note:** You need not enter all information during ticket creation. Some of the fields may be updated during problem resolution.

---

Once the details have been saved, a new ticket is created. You can view the ticket you created on the **View Tickets** page. Unless you have set an order of preference, the latest ticket created is displayed on top of the page.

## 12.4.5 Posting Tickets to Knowledge Base

The last section on the **Add tickets** page is the **Knowledge Base Post**, as shown in [Figure 12.6](#). This section enables you to post tickets to the Knowledge base.



The screenshot shows a dialog box titled "Knowledge Base Post" with a yellow header. It contains three sections: "Do you want to post ticket to knowledge base?" with radio buttons for "Yes" and "No" (where "No" is selected); "Status" with a dropdown menu showing "Draft"; and "Accessible to portal user?" with radio buttons for "Yes" and "No" (where "No" is selected). At the bottom are "Insert" and "Cancel" buttons.

Figure 12.6 Posting Tickets to Knowledge Base

If you want to post a ticket to knowledge base, select **Yes**, else select the option **No**, as shown in [Figure 12.6](#).

**Status** displays the status of the ticket. Select **No** to restrict portal users to access the ticket details, as shown in [Figure 12.6](#). Select **Yes** else select **No**.

## 12.5 Viewing Ticket Details

To view the list of tickets, click **View Details** or **Modify** from the context menu, as shown in [Figure 12.3](#). A list of sub-tabs is displayed on the right, and ticket information is displayed below the name of the ticket. Click the ticket number to view the details, and tabs to modify and delete the ticket.

Each sub-tab represents information on different categories of tickets. The following sub-tabs are displayed, as shown in [Figure 12.7](#):

- **Details** - displays basic information about a ticket.
- **History** - displays a chronological record of every change made, and actions taken against a ticket.
- **Activity Log** - displays the time spent and specific services rendered with respect to a ticket.

This information integrates with the contracts and assets areas.

- **Action Plans** - enables you to establish a specific set of steps to complete to fix the problem mentioned in the ticket.
- **Maintenance Notes** - displays specific actions taken for an issue.

# 000001 → Help Desk > Search Form > Search Results > Ticket Details

**Account:** Concourse Corp Printable Ticket Form

**Status:** Open

Modify Delete

**Primary Contact**

Name	Barsell, Tri
Title	
Email	
Phone	

**Ticket Information**

Ticket State	In progress
Ticket Source	Phone
Service Contract Number	
Asset Serial Number	
Issue	Bug in CRM
Location	
Defect	
Category	
Severity	Normal
Entered	Asha Kadam 11/15/2007 1:13 AM EST
Modified	Asha Kadam 11/15/2007 1:13 AM EST

Details  
History  
Activity Log  
Maintenance Notes  
Action Plans  
Tasks  
Folders  
Documents  
Correspondence

Figure 12.7 Ticket Details

- Tasks
- Folders
- Documents

The details are displayed in the following categories:

- **Primary Contact** - provides a brief description of the person having an issue.
- **Ticket Information** - provides basic information about the issue such as location and category.
- **Assignment** - provides information on the person responsible for resolving this issue in the organization.
- **Resolution** - provides information on the solution for the issue, the cause of the issue, and the date on which it was resolved.

## 12.5.1 Viewing Ticket History

The **History** sub-tab contains a detailed chronological history of each action taken and modifications to a ticket, from its creation to its resolution.

You cannot make any modifications to this tab as it is a read-only display. You can review ticket workflow, or do post-issue analysis. The ticket **History** page is shown in [Figure 12.8](#).

# 000001 → [Help Desk](#) > [Search Form](#) > [Search Results](#) > [Ticket Details](#) > [History](#)

**Account:** Concursive Corp  Printable Ticket Form


**Status:** Open

Ticket Log History		
Asha Kadam	11/15/2007 1:13 AM EST	[ Ticket Opened ]
Asha Kadam	11/15/2007 1:13 AM EST	[ Your message is created with ticket#1 ]
Asha Kadam	11/15/2007 1:13 AM EST	[ Ticket is unassigned ]
Asha Kadam	11/15/2007 1:13 AM EST	[ Ticket state is In progress ]
Asha Kadam	11/15/2007 1:13 AM EST	[ Priority set to Next ]
Asha Kadam	11/15/2007 1:13 AM EST	[ Severity set to Normal ]

Details  
**History**  
Activity Log  
Maintenance Notes  
Action Plans  
Tasks  
Folders  
Documents  
Correspondence

Figure 12.8 The Ticket History Page

## 12.5.2 Adding Activities

Click the **Activity Log** sub-tab on the **Ticket Details** page to view a list of activities that have been performed against an issue. The issue may be associated with a contract. When you click , a context menu is displayed with the following options:

- View the details of activities
- Modify existing activities
- Delete activities

You can add new activities and schedule follow-up activities.

The activities page is displayed, as shown in [Figure 12.9](#).

Enter the following details, as shown in [Figure 12.10](#):

- Service contract number
- Description of service provided
- Time taken for its execution including travel time
- Activity date

# 000001 → [Help Desk](#) > [View Tickets](#) > [Ticket Details](#) > Activity Log

**Account:** Focus Tech  [Printable Ticket Form](#)

**Status:** Open

[Add activities](#)

Records 1 to 1 of 1 total [Previous|Next]

	First Activity Date	Last Activity Date	Follow Up?	Alert Date	Follow Up Description	Modified
	1/8/2008	1/8/2008	Yes	1/9/2008 EST	Check the belt for correct working	1/7/2008 EST

us|Next] Page  of 1, Items per page:

- View Details
- Modify
- Delete

- Details
- History
- Activity Log
- Maintenance Notes
- Action Plans
- Tasks
- Folders
- Documents
- Correspondence

Figure 12.9 The Activity Log

# 000001 → Help Desk > View Tickets > Ticket Details > Activity Log > Add Activity Log

Account: Focus Tech  
 Status: Open

Printable Ticket Form

Save Cancel

**General Information**

Service Contract Number

**Per Day Description of Service**

Activity Date	Travel Time [Towards Contract <input checked="" type="checkbox"/> ]	Labor Time [Towards Contract <input checked="" type="checkbox"/> ]	Description of Service
<input type="text"/> GMT-5 Eastern US	0 hrs 0 min	0 hrs 0 min	
<input type="text"/> GMT-5 Eastern US	0 hrs 0 min	0 hrs 0 min	
<input type="text"/> GMT-5 Eastern US	0 hrs 0 min	0 hrs 0 min	
<input type="text"/> GMT-5 Eastern US	0 hrs 0 min	0 hrs 0 min	
<input type="text"/> GMT-5 Eastern US	0 hrs 0 min	0 hrs 0 min	

Details  
 History  
**Activity Log**  
 Maintenance Notes  
 Action Plans  
 Tasks  
 Folders  
 Documents  
 Correspondence

Figure 12.10 Add Activity Log

### 12.5.3 Adding Maintenance Notes

The **Maintenance Notes** tab on the **Ticket Details** page, enables you to enter specific actions taken for an issue that is related to an asset on contract. The page is shown in [Figure 12.11](#).

# 000001 → Help Desk > Search Form > Search Results > Ticket Details > Maintenance Notes

**Account:** Concourse Corp  [Printable Ticket Form](#)

**Status:** Open

**Serial No:** 11445    **Vendor:**    **Model:**    **Location:** Not Specified

**Service Contract No:** Onsite **Service Model:** None **Start Date:** **End Date:**

[Add Maintenance Note](#) Records 1 to 1 of 1 total [Previous|Next] ↻

Entered Date	Description
11/21/2007 EST	Monthly Service check provided.

Page 1 of 1, Items per page: 10

- View Details
- Modify
- Delete

- Details
- History
- Activity Log
- Maintenance Notes
- Action Plans
- Tasks
- Folders
- Documents
- Correspondence

**Figure 12.11 Maintenance Note**

To add a maintenance note, an asset must be entered in the ticket creation process, by clicking **Add Maintenance Note**, as shown in [Figure 12.12](#).

Figure 12.12 Add Maintenance Note

You can enter details about the replacement parts that may be required, so that follow-up by another person becomes easier.

## 12.5.4 Adding Action Plans

**Ticket** action plans are similar to **Accounts** action plans. To create an action plan, click the **Add Action Plan** link located at the top of the page. Action Plans can also be added for the ticket from the **Add Ticket** and **Modify Ticket** pages.

---

**Note:** For more details, refer to [Section 7.10.1, “Adding an Action Plan”](#).

---

## 12.5.5 Adding Tasks

The **Tasks** page can be accessed by clicking the **Tasks** sub-tab on the **Ticket Details** page. Tasks are actions assigned to a person in a department. Tasks are useful in situations where specific actions must be taken to resolve an issue, even when the actions are cross-department. When an action is assigned to an individual, they are notified, both on the ConcourseSuite dashboard and through email. You can click **Add a Task** on the **Tasks** page, to add a ticket task, as shown in [Figure 12.13](#).



# 000001 → Help Desk > Search Form > Search Results > Ticket Details > Tasks

Account: Concourse Corp  
 Status: Open  
 Add a Task

Printable Ticket Form

Priority	Task	Assigned To	Due Date	Complete Date	Age
1	Call to set up a time [Contact]	Asha Kadam	11/22/2007 EST	-NA-	0d
	and collateral to CSR	Will Li	11/23/2007 EST	-NA-	0d

View Details  
 Modify  
 Reassign  
 Delete

Details  
 History  
 Activity Log  
 Maintenance Notes  
 Action Plans  
**Tasks**  
 Folders  
 Documents  
 Correspondence

Figure 12.13 Ticket Tasks

## 12.5.6 Using Folders

Folders are useful for collecting different kinds of information relating to an issue that is not covered by the basic application. Folders in help desk are identical to folders in ConcourseSuite. You may create as many folders as you want. Folders are defined in the **Admin** module. They can have any number of fields with various types.

## 12.5.7 Using Documents

You must always store documents with an issue. Storing documents with an issue helps you organize information as specified below:

- Storing technical information about the issue
- Archiving narratives about the issue and its resolution
- Uploading correspondence related to the issue with the customers

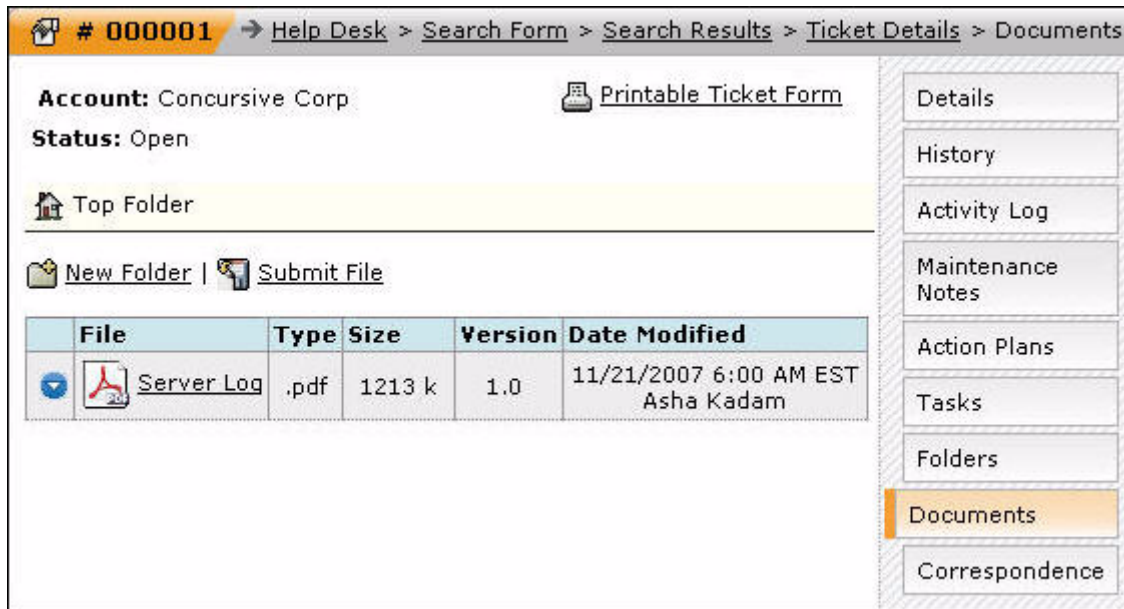


Figure 12.14 Ticket Document

The ticket information can be uploaded from a file by clicking **Submit File**, as shown in [Figure 12.14](#).

## 12.5.8 Accessing the Correspondence Page

All correspondence through emails to and from a contact can be accessed on the **Correspondence** page. Click the **Correspondence** tab to access this page. Select the option **Sent (Outbox)** to access the list of messages sent using **Help Desk**, as shown in [Figure 12.15](#).

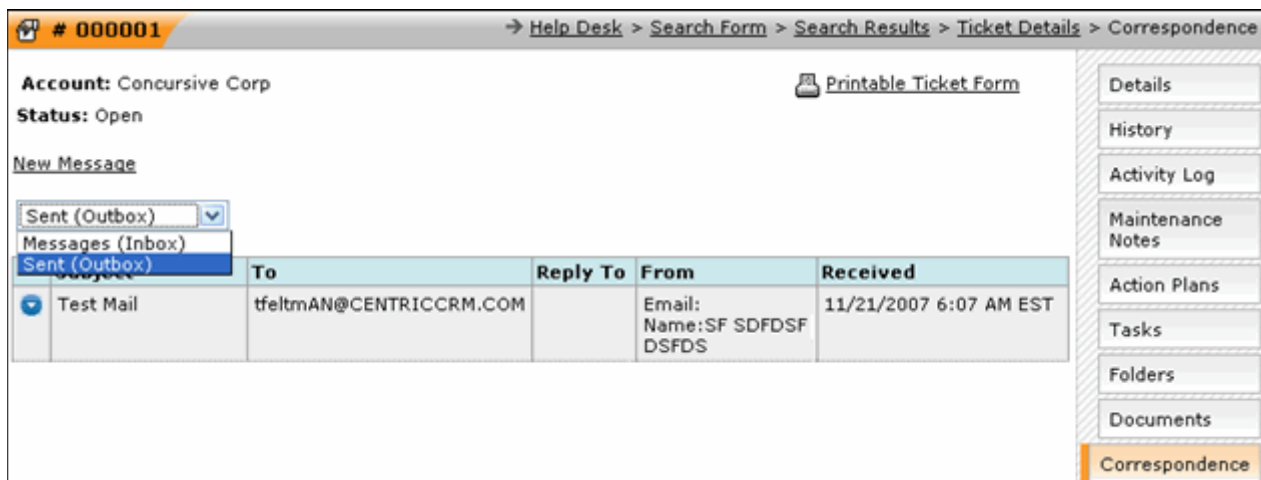


Figure 12.15 Accessing the Outbox on Correspondence Page

Select **Messages (Inbox)** to access the list of messages received.

## 12.5.9 Viewing Miscellaneous Actions

The other actions that can be performed on a ticket are as follows:

- **Printable Ticket Forms** - provides the output as a PDF file for printing.  
It is useful when you want to print a ticket in a formal view so that a technician can take it to the customer site.
- **Exporting Tickets** - enables you to filter tickets and manage them.

You can also include or delete information and create a report in HTML or spreadsheet format for downloading. To export a ticket, click **Export** on the menu bar. The **Export Data** page is displayed, as shown in [Figure 12.16](#).

The screenshot shows the 'Export Data' interface in a 'Help Desk' application. The breadcrumb trail is 'Help Desk > Export Data > New Export'. The interface includes a 'Generate' and 'Cancel' button at the top. The main section is titled 'Export Data' and contains several form fields: 'Type' (Ticket Listing), 'Subject' (empty), 'Criteria' (Tickets Assigned to Me), 'Sorting' (Ticket ID), and four 'Ticket Category Level' dropdowns (all set to Undetermined). There is also an 'Entered Date between' section with two date pickers and an 'and' operator. At the bottom, there is a 'Select fields to include' section with a list of fields (Location, Entered, Entered By, Modified, Modified By) and buttons for 'All >', 'Add >', and '< Del'. A second list shows 'Ticket ID', 'Organization Name', and 'Issue' with 'Up' and 'Down' buttons. 'Generate' and 'Cancel' buttons are at the bottom.

Figure 12.16 Ticket Export - New

You can download the data in the .CSV format, as shown in [Figure 12.17](#). After downloading, you can format and view the data using Excel or any other database program.

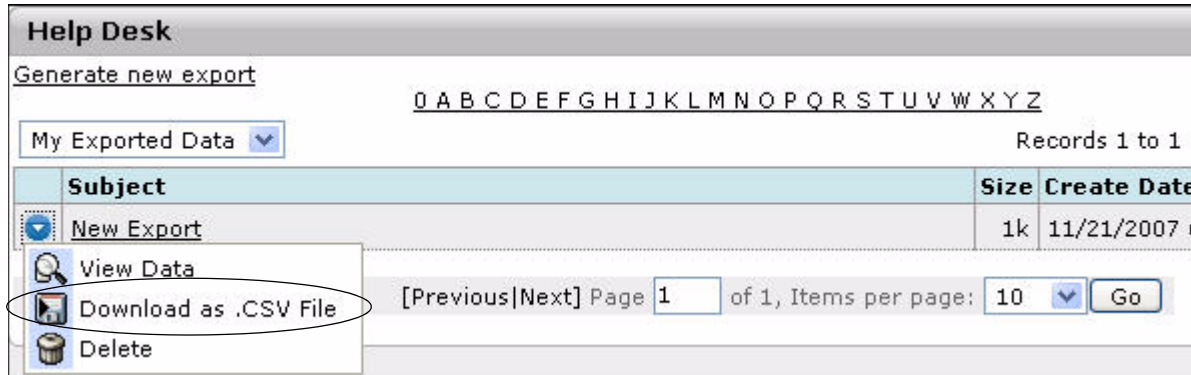


Figure 12.17 Export Ticket Data

## 12.6 Searching for a Ticket

You can search for a particular ticket in this module by clicking **Search** on the menu bar. A **Search Form** is displayed, as shown in [Figure 12.18](#).

The screenshot shows the 'Help Desk' interface with the 'Search Tickets' form. The form has a yellow header and contains the following fields and controls:

- Ticket Number:
- Issue:
- Accounts: All [Select] [Clear]
- Severity: -- Any --
- Priority: -- Any --
- Status: -- Any --
- Escalation Level: -- Any --
- Resource Assigned: Anyone [Change Owner] [Clear]
- Assigned Group: Any [Select] [Clear]

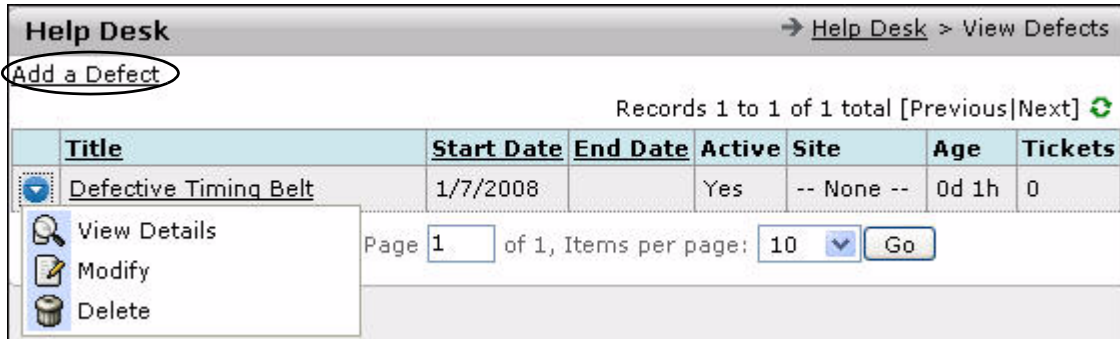
At the bottom of the form are two buttons: [Search] and [Clear]. The breadcrumb navigation at the top right reads 'Help Desk > Search Form'.

Figure 12.18 The Search Form


To search for a particular ticket, enter the ticket number and the issue with which it is associated. Select from the following options: severity, priority, status, and the person assigned to this ticket. If you want to view all the tickets at a time, click **Search** without entering any information.

## 12.7 Adding Defects

A defect is used to group a set of events that disrupt services in the infrastructure. Defects are used to identify and label issues, which the underlying cause is the same. They enable you to organize similar tickets together based on their cause. You can access the **View Defects** page by clicking the **Defects** link on the **Help Desk** menu bar. New defects can be added in the **View Defects** page, as shown in [Figure 12.19](#).



**Figure 12.19** List of Defects in the Help Desk Module

When you click , a context menu is displayed with the following options:

- View Details
- Modify
- Delete

The defect details page lists all tickets related to the current defect, as shown in [Figure 12.20](#).

Tickets can be associated with defects from the **Add Ticket** or **Modify Ticket** pages.

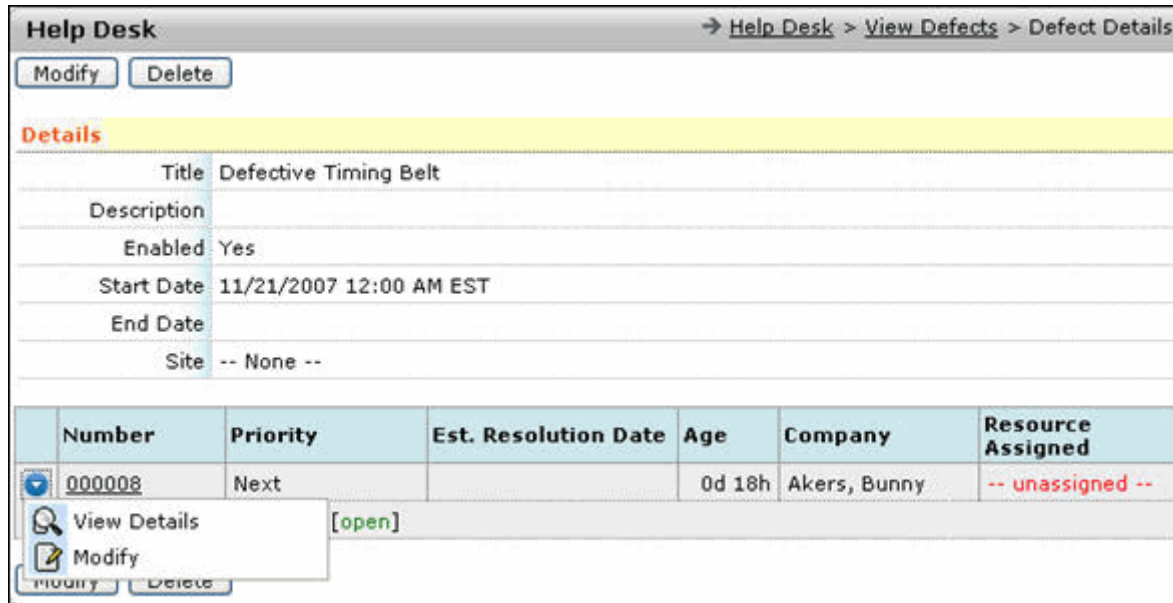


Figure 12.20 The Defects Details Page

## 12.8 Understanding Knowledge Base

Knowledge Base is a collection of information stored in the system used to extract inferences and suggest solutions to problems. The **Knowledge Base** page can be accessed by clicking the **Knowledge Base** link on the menu bar. The Knowledge Base entries help you provide solutions to your problems based on your ticket categorization and solution documentation.

It also enables you to store several versions of a file for an entry that can be retrieved with the Knowledge Base entry. These entries can be added only after selecting the appropriate ticket categories in the list page, as shown in [Figure 12.21](#). To add a Knowledge Base entry after selecting the categories, click the **Add a Document** link on the **Knowledge Base** page.

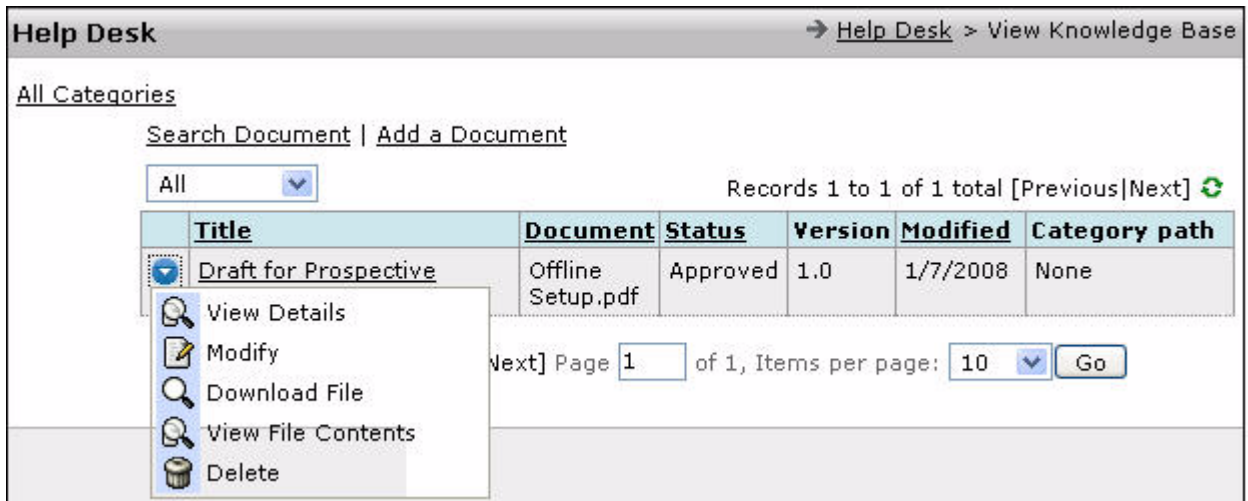


Figure 12.21 Knowledge Base for Help Desk

## 12.8.1 Viewing Knowledge Base Details

The **View Knowledge Base** page provides an overview of the entries in the **Details**, **File Details**, and **Record Details** sections, as shown in [Figure 12.22](#).

The following tabs are displayed on the **View Knowledge Base** page:

- **Modify** - enables you to add a new version of the document to the Knowledge Base entry.
- **Delete** - enables you to delete a document.
- **Download File** - enables you to download an attached document.

This option is only available if the Knowledge Base entry has an attached document.

- **View File Contents** - enables you to view the attached document.

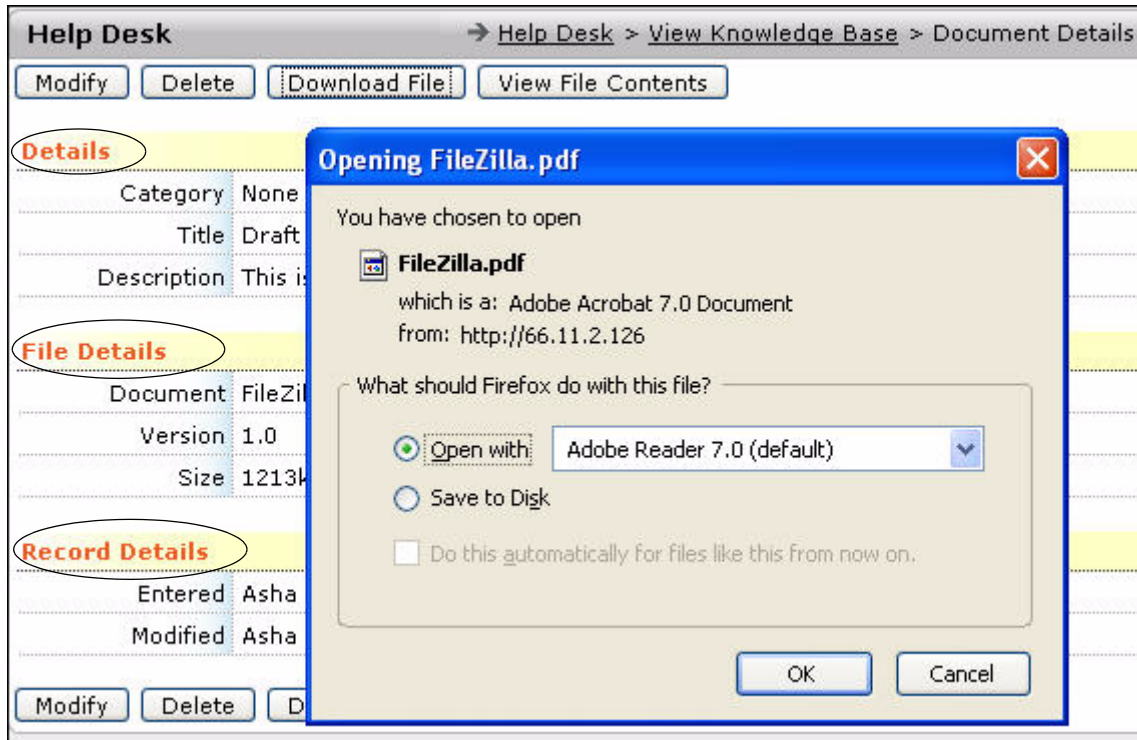


Figure 12.22 The Knowledge Base Details Page



## Managing Documents

This chapter provides information about the **Documents** module of ConcourseSuite. This module provides facilities for a hierarchical document storage in a single database that contains all operational information.

This chapter consists of the following sections:

- ❑ [Section 13.1, “How Does This Module Help You?”](#)
- ❑ [Section 13.2, “Viewing Documents Home Page”](#)
- ❑ [Section 13.3, “Adding a Document Store”](#)
- ❑ [Section 13.4, “Searching for a Document Store”](#)
- ❑ [Section 13.5, “Viewing Document Store Details”](#)

### 13.1 How Does This Module Help You?

Expanding business can result in the accumulation of a large amount of information in the form of records, desktop post-its, and printed pages. Thus, vital information may get lost or misplaced. The **Documents** module helps you group necessary information in special document stores and save them in a database. A document store is a place that can have folders and documents within folders.

This module is the most powerful and useful feature of ConcourseSuite.

**Documents** also enables you to set user group access permissions for stored data access and modification.

### 13.2 Viewing Documents Home Page

The **Documents** page can be accessed by clicking the **Documents** tab. The **Document** menu bar is shown in [Figure 13.1](#).

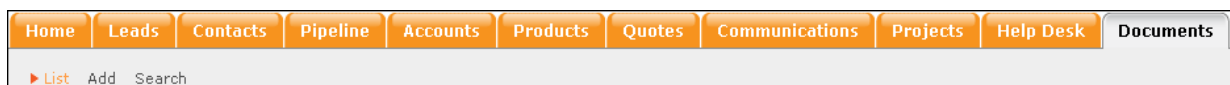


Figure 13.1 The Documents Menu Bar

The **Documents** home page displays a list of document stores currently registered in ConcourseSuite. You can select to view these stores from the following drop-down lists:

- **Open Document Stores**
- **Archived Document Stores**

The **Open Document Store** menu displays the current status of the document store, whether it is approved or pending for approval. The list in this category is displayed in [Figure 13.2](#).

The **Archived Document Store** menu displays all the stores that have been archived. These documents might be necessary for future reference. The list in this category is displayed in [Figure 13.3](#).

The screenshot shows the 'Documents' page with a breadcrumb trail 'Documents > List'. Below the header, there is a link 'Create a document store'. A dropdown menu is open, showing 'Open Document Stores' selected. The page title is 'Document Stores 1 to 2 of 2 total'. Below this is a table with three columns: 'Title', 'Short Description', and 'Status'. The table contains two rows: 'Educational Background' and 'White Papers'. At the bottom, there is a pagination control showing 'Page 1 of 1' and 'Items per page: 10'.

Title	Short Description	Status
<b>Educational Background</b>	Stores the educational background of employees	This document store was approved on 12/21/2007 1:37 AM EST
<b>White Papers</b>	White papers related to insurance companies	This document store was approved on 12/21/2007 1:38 AM EST

Figure 13.2 Open Store Documents

The screenshot shows the 'Documents' page with a breadcrumb trail 'Documents > List'. Below the header, there is a link 'Create a document store'. A dropdown menu is open, showing 'Archived Document Stores' selected. The page title is 'Document Stores 1 to 1 of 1 total'. Below this is a table with three columns: 'Title', 'Description', and 'Status'. The table contains one row: 'HR Policies'. At the bottom, there is a pagination control showing 'Page 1 of 1' and 'Items per page: 10'.

Title	Description	Status
<b>HR Policies</b>	Contains all the documents related to HR	This document store was archived on 1/7/2008 2:04 AM EST

Figure 13.3 Archived Store Documents

### 13.3 Adding a Document Store

To add a new document store, click **Add** on the menu bar or click **Create a Document Store**. The **Add** page containing a blank new document store form is displayed, as shown in [Figure 13.4](#).

Documents		→ Documents > Add
<b>New Document Store Information</b>		
Title	Educational Background *	
Short Description	Contains the educational certificates of the employees *	
Start Date	1/7/2008 at 02 : 10 AM GMT-5 Eastern US *	
Requested By		
Organization		
Status	<input checked="" type="checkbox"/> Approved	
Public	<input type="checkbox"/> Allow website users to access all documents in this store	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Figure 13.4 Adding a Document Store

Enter the following information:

- **Title** - the name of the document store.
- **Short Description** - a description of the document store.
- **Start Date** - the date when the store was added to the list.
- **Requested By** - the name of the person who requested for the store.
- **Organization** - the client to which the store is referring.
- **Status** - whether the store has been approved or not.
- **Public** - whether users of ConcourseSuite are allowed to access the document store or not.

Enter key terms and words in the description for a quick search later.

## 13.4 Searching for a Document Store

Clicking **Search** on the menu bar displays the **Search** page, as shown in [Figure 13.5](#). To perform a search, define the search scope in the **Scope** field. The **Scope** field has the following options:

- **All Document Store data**
- **Documents**
- **Details**

---

**Note:** While defining the search keyword, note that the search is case-sensitive.

---

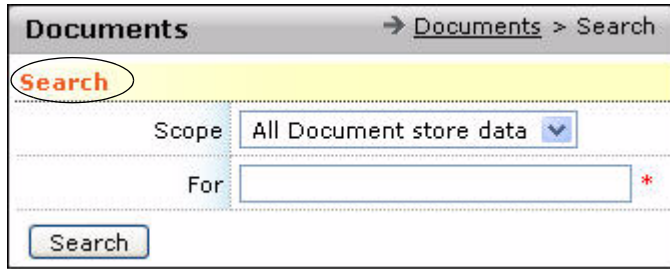


Figure 13.5 Searching Documents

After you have entered the description in the **For** field, the system searches all the available items, and displays the documents that satisfy your criteria. The page listing the search items is displayed, as shown in [Figure 13.6](#).

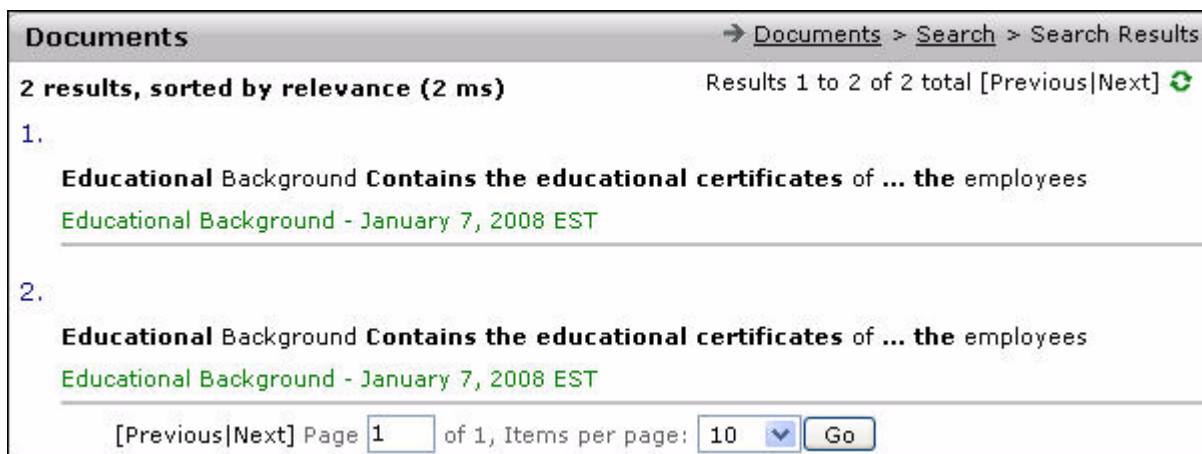


Figure 13.6 Documents Search Results

## 13.5 Viewing Document Store Details

Click the title of the document store to view its details. The following tabs are displayed on the **Document Store Details** page:

- **Documents** - all folders and documents belonging to that store.
- **Accounts** - the accounts that have been linked to this document store.
- **Team** - the team members to whom the store belongs.
- **Details** - the details of the store.
- **Permissions** - option of setting the permissions to view the store.

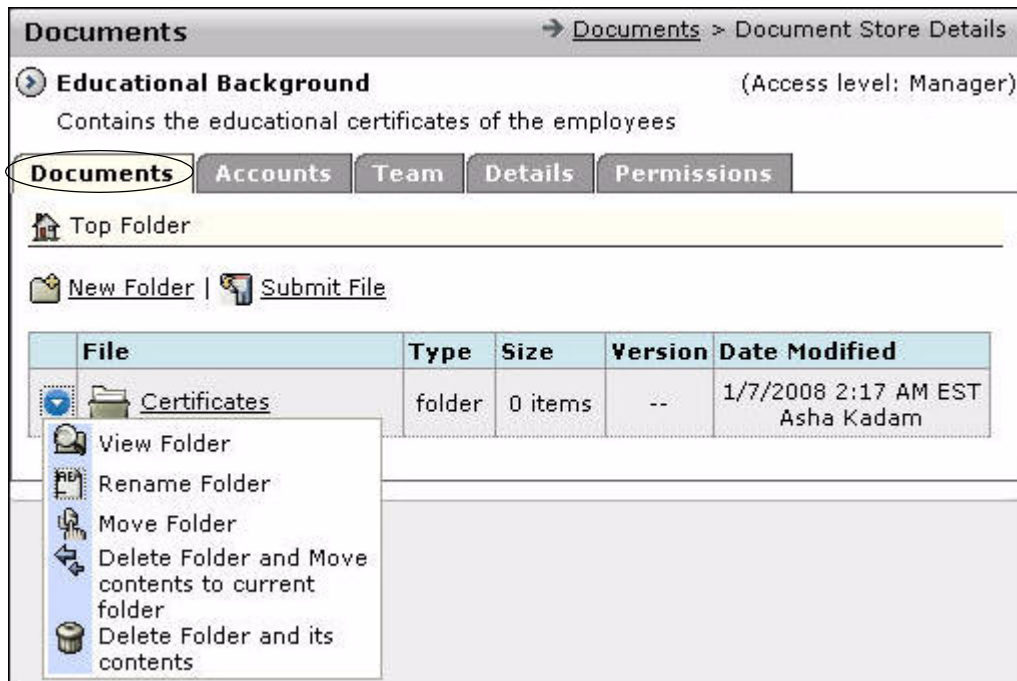


Figure 13.7 Document Store Details: Tab Documents

### 13.5.1 Viewing the Documents Page

Within a store, you can organize folders according to hierarchy and place relevant files in each folder. You can select from a variety of options for modifications, as shown in [Figure 13.7](#).

---

**Note:** There are several pre-defined access levels. The manager's level is the topmost. You may configure permissions for access to the folders by defining the access and role of each user. If you have logged in as a guest and the role assigned to you is that of a manager, you can view all documents that a manager has access to.

---

You can access the **Documents** section by clicking **Documents** on the **Document Store Details** page. On this page, when you add a folder, a list of sub-folders and files is displayed, as shown in [Figure 13.8](#).

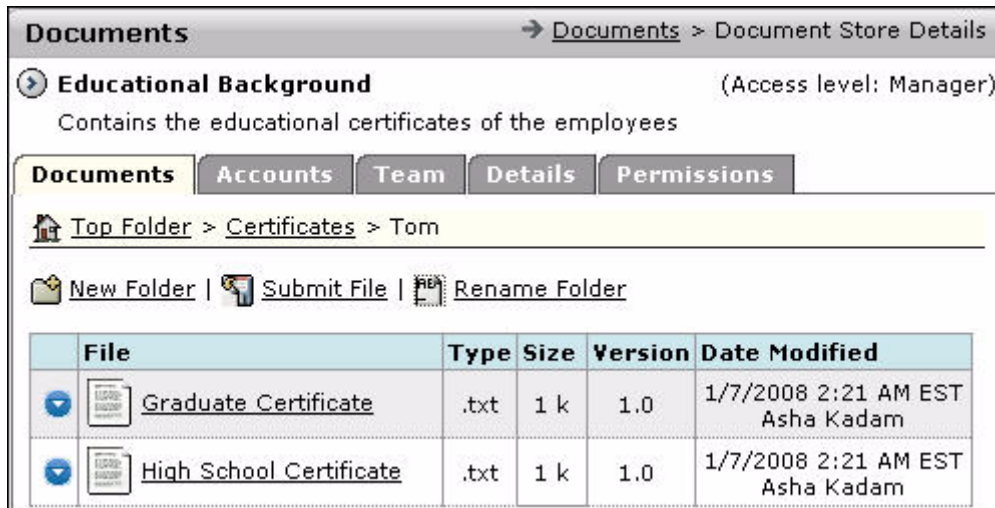


Figure 13.8 Document Store Details: Folder Content, Files List

To submit a file into the current folder, click the **Submit File** link at the top. The **Upload File** dialog is displayed, as shown in [Figure 13.9](#).

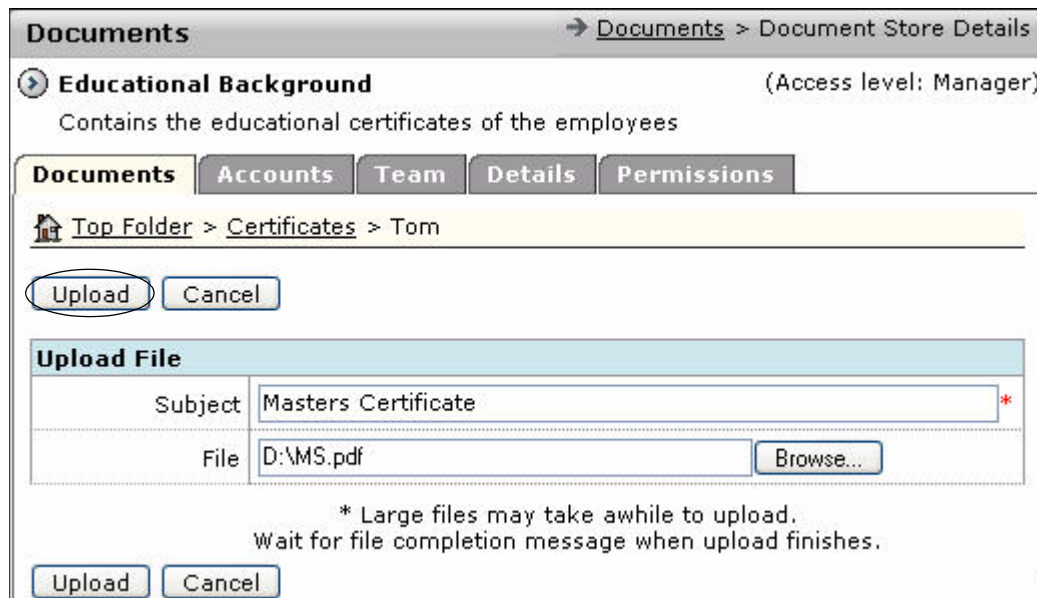


Figure 13.9 Document Store Details: Uploading File

While uploading a document file, enter the subject and click **Choose File** to browse the target file in your hard drive. You can upload as many files as required to a folder. Click **Upload** to submit, or **Cancel** to abandon file upload.

## 13.5.2 Viewing the Accounts Page

In the **Accounts** tab, you can link a document store to an account. Click **Link an Account**, as shown in [Figure 13.10](#), to link the document store to an account.



Figure 13.10 Linking an Account to the Document Store

All the available accounts are displayed, as shown in [Figure 13.11](#).

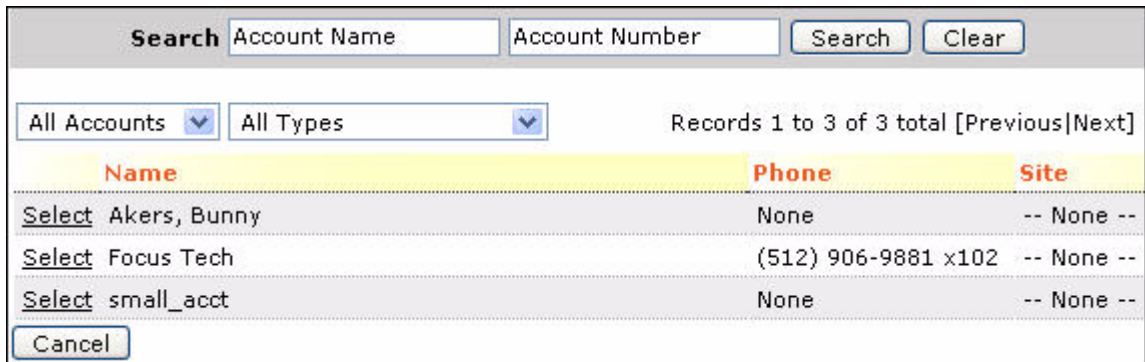


Figure 13.11 Account List

Click **Select** next to the account name to select the account. The account is now linked to the document store. You can access the document store in the **Accounts** module as shown in [Figure 13.12](#).

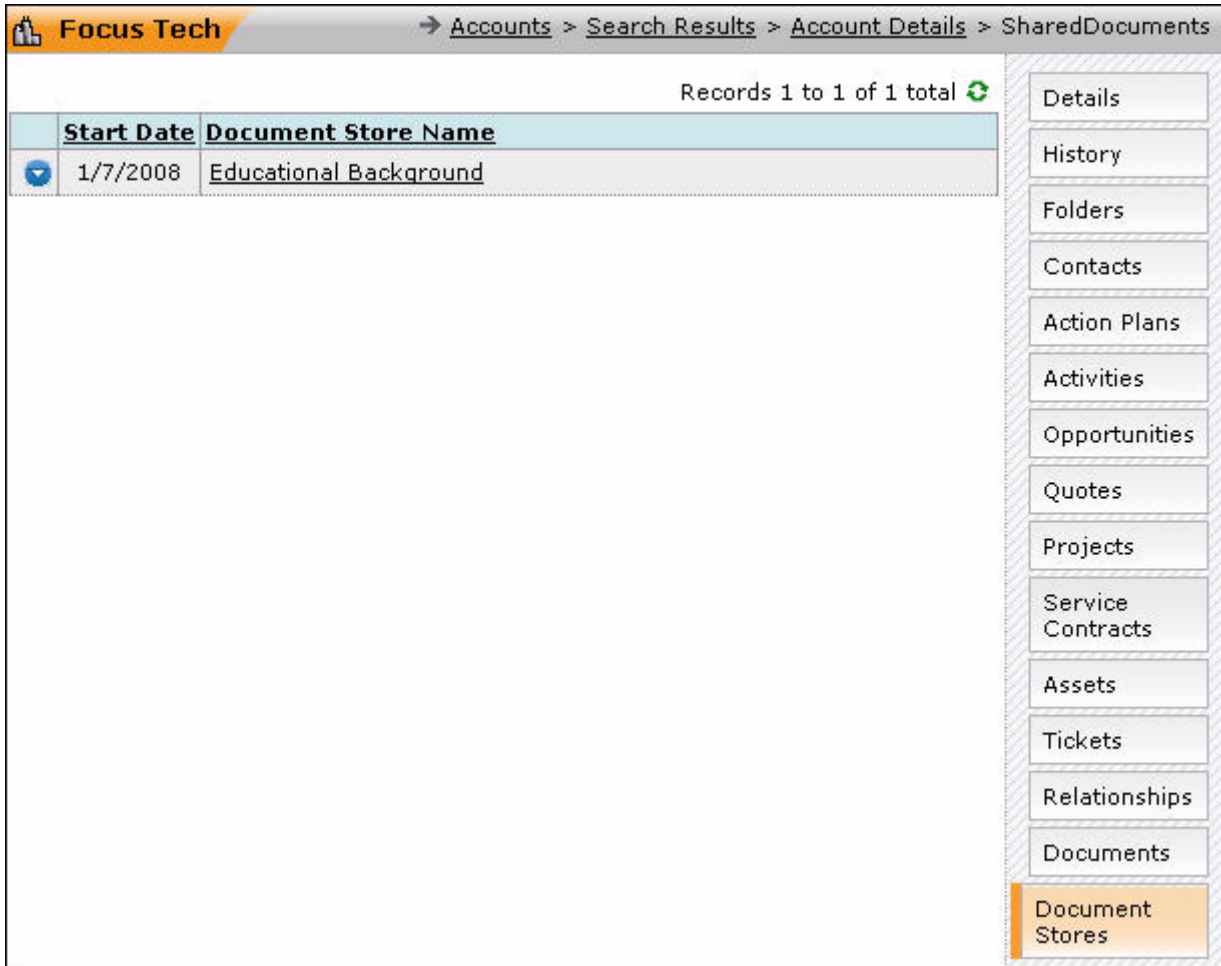


Figure 13.12 Viewing Document Store in Accounts Module

### 13.5.3 Viewing Team Page

Click **Team** on the **Document Store Details** page to view and modify the team membership. A page containing a list of people who can access the store is displayed along with their level of access.

You can select from several sections of authorized individual groups listed as follows:

- Employees
- Account contacts
- Roles

For each group, details, such as the department to which they belong, email addresses, and the last access date are displayed. The access level, which determines the permissions granted to the level holder, is set by the manager.



**Documents** → [Documents](#) > Document Store Details

**Educational Background** (Access level: Manager)  
Stores the educational background of employees

**Documents** | **Accounts** | **Team** | **Details** | **Permissions**

Team

[Modify User Membership](#) | [Modify Group Membership](#)

\* Immediately change the team member's role by making changes below

Employees Records 1 to 1 of 1 total

Access level	Name	Department	Email Address	Last Accessed
Manager	Asha Kadam			12/21/2007 EST

Account Contacts No records to display

Access level	Name	Organization	Email Address	Last Accessed
Account contacts have not been added to the store				

Roles No records to display

Access level	Name
User Role membership has not been defined	

Departments No records to display

Access level	Name
Department membership has not been defined	

Portal Users No records to display

Access level	Name	Organization	Email Address	Last Accessed
Portal Users contacts have not been added to the store				

Figure 13.13 Document Store Details: Tab Team

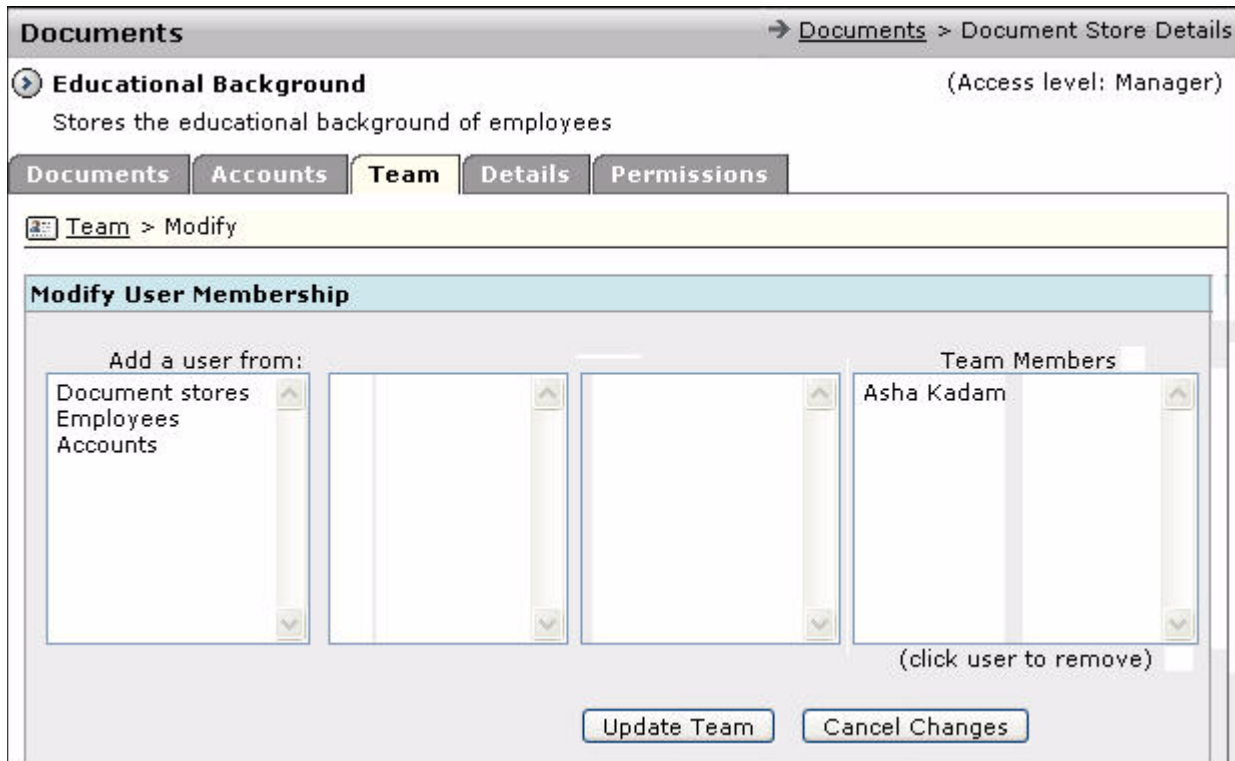
You can setup access membership in the following ways:

- **Modify User Membership** - for individuals
- **Modify Group Membership** - for groups or departments

Under individual user membership, user details are interlinked. When you select a category in the first column (**Add a user from**), the departments that belong to that category are displayed in the second column (**Select a department**), as shown in [Figure 13.14](#).

Upon selecting a department, a list of related contacts in the third column (**Select a contact**) is displayed. After selecting a contact, you can add it to the store access team in the last column (**Team Members**).

To delete a member from the team, click the name in the **Team Members** column. Click **Update Team** to save the modifications.



**Figure 13.14 Document Store Details: Modifying User Membership**

The group access membership grants access to the store for all members of specified groups, whether it is roles or departments. The following columns help you in modifying individual access. The details page is shown in [Figure 13.15](#). This page enables you to specify values for the following:

- Add a group from
- Select a role
- Team Members

All the columns are interlinked. Click **Update Team** after making any changes.

**Document Store Details** → Documents > Document Store Details

**Educational Background** (Access level: Manager)  
Stores the educational background of employees

Documents Accounts **Team** Details Permissions

Team

[Modify User Membership](#) | [Modify Group Membership](#)

\* Immediately change the team member's role by making changes below

Employees Records 1 to 3 of 3 total ↻

Access level	Name	Department	Email Address	Last Accessed
Manager	Asha Kadam			11/21/2007 EST
Guest	new employee			--
Guest	Tri Barsell			--

Figure 13.15 Document Store Details: Modifying Groups

### 13.5.4 Viewing Details

The **Details** section is shown in [Figure 13.16](#). Clicking the **Details** tab displays a page which contains the following fields:

- Title
- Approval status
- Last date of entry
- Modification dates
- Other details

**Documents** → [Documents](#) > Document Store Details

**Educational Background** (Access level: Manager)  
Stores the educational background of employees

[Documents](#) | [Accounts](#) | [Team](#) | **Details** | [Permissions](#)

Overview

[Modify Document Store](#) | [Delete Document Store](#)

General Information	
Status	This document store was approved on 11/19/2007 8:16 AM EST
Title	Educational Background
Short Description	Stores the educational background of employees
Start Date	11/19/2007 EST
Requested By	
Organization	
Entered	Asha Kadam 11/19/2007 8:16 AM EST
Modified	Asha Kadam 11/19/2007 8:16 AM EST

**Figure 13.16 Document Store Details: Tab Details**

Clicking **Modify Document Store** displays an editable page, as shown in [Figure 13.17](#), which enables you to modify the store. You can also specify the store status, whether approved and/or archived.

**Documents** → Documents > Document Store Details

**Educational Background** (Access level: Manager)  
Stores the educational background of employees

Documents Accounts Team **Details** Permissions

Overview < **Modify Document Store**

Update Cancel

**Update Document Store Information**

Status	<input checked="" type="checkbox"/> Approved 11/19/2007 8:16 AM <input type="checkbox"/> Archived
Title	Educational Background *
Short Description	Stores the educational background of employees *
Start Date	11/19/2007 at 08 : 15 AM GMT-5 Eastern US *
Requested By	
Organization	
Public	<input type="checkbox"/> Allow website users to access all documents in this store

Update Cancel

Figure 13.17 Document Store Details: Updating Details

---

**Note:** The **Archived** status is used to show and hide stores on the **Documents** home page.

---

### 13.5.5 Viewing Permissions

The **Permissions** tab on the **Document Store Details** page enables you to view and configure access permissions to the store for different user access levels, as shown in [Figure 13.18](#).

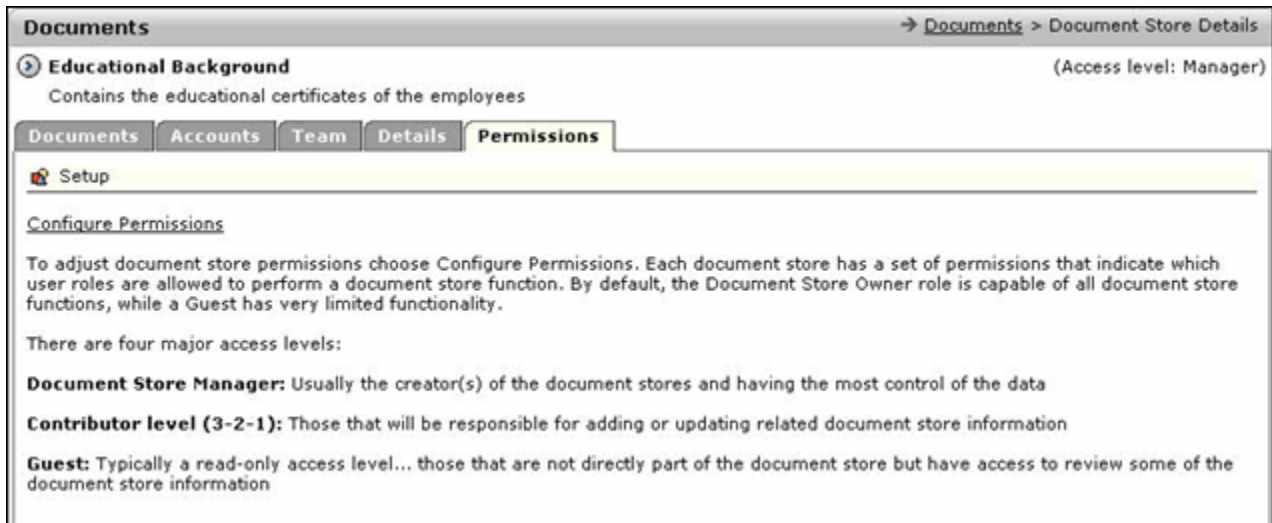


Figure 13.18 Document Store Details: Tab Permissions

The pre-defined levels are:

- Manager
- Contributor Levels 3, 2, and 1
- Guest

The access levels increase upwards from the guest to the manager. This is to ensure access to information at all levels, and to prevent tampering of data. The manager sets the permissions and has the most control of data.

The manager uses the **Configure Permissions** link to set user access and define roles for each level. Each parameter is defined and the access levels are set, as shown in [Figure 13.19](#). The main areas are:

- Document Store Details
- Team Members
- Document Library
- Setup

Each of the above are sub-divided into actions. For each action, the lowest access level can be specified by choosing from a pop-up menu to the right of the action.

**Documents** → [Documents](#) > Document Store Details

**Educational Background** (Access level: Manager)  
Stores the educational background of employees

**Documents** | **Accounts** | **Team** | **Details** | **Permissions**

[Setup](#) > Configure Permissions

Permissions	
Document Store Details	Lowest Access level
View document store details	Guest
Modify document store details	Manager
Delete document store	Manager
Team Members	Lowest Access level
View team members	Guest
See team member email addresses	Contributor level 1
Modify team	Manager
Modify team member role	Manager
Document Library	Lowest Access level
View documents	Guest
Create folders	Contributor level 3
Modify folders	Contributor level 2
Delete folders	Contributor level 3
Upload files	Contributor level 1
Download files	Guest
Rename files	Contributor level 2
View document store details	Contributor level 3
Setup	Lowest Access level
Configure document store permissions	Manager
Accounts	Lowest Access level

**Figure 13.19 Document Store Details: Configure Permissions**

Once the permissions are set, click **Update** to save the information.





## Managing Company

This chapter provides information about the **Company** module of ConcourseSuite. This module helps you store basic information about employees.

This chapter consists of the following sections:

- ❑ [Section 14.1, “How Does This Module Help You?”](#)
- ❑ [Section 14.2, “Viewing the Dashboards Page”](#)
- ❑ [Section 14.3, “Viewing the Employees Page”](#)
- ❑ [Section 14.4, “Managing Employees”](#)
- ❑ [Section 14.5, “Downloading a vCard”](#)

### 14.1 How Does This Module Help You?

This module provides information about employees of your company, who become users of ConcourseSuite. It acts as an employee database providing access to employee information, such as title, email address, phone numbers, and address. The module also enables you to set data ownership responsibilities for all employees.

You can access the **Company** module by clicking the **Company** tab, as shown in [Figure 14.1](#).

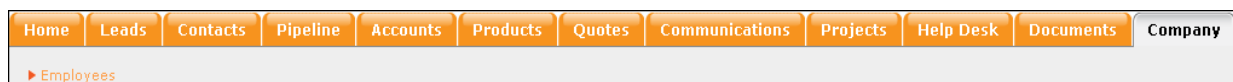


Figure 14.1 Accessing the Company Module

### 14.2 Viewing the Dashboards Page

The **Dashboards** page is the default page in the **Company** module. The **Dashboards** page displays the module data in graphical or tabular format. The dashboards are configured in the **Admin** module. For more details, refer to [Section 16.7.2, “Configuring Dashboards”](#).

## 14.3 Viewing the Employees Page

Click **Employees** on the menu bar. The **View Employees** page is displayed in [Figure 14.2](#). This page displays a list of employees along with their department, title, phone number, and site.

	Name	Department	Title	Phone	Site
▼	Barsell, Tri ✉				-- None --
▼	employee, new ✉		AA		-- None --
▼	feltman ✉				-- None --
▼	feltman ✉				-- None --
▼	Kadam, Asha ✉		Project Manager		-- None --
▼	Li, Will ✉				-- None --
▼	Li, William ✉				-- None --

Figure 14.2 Viewing the Employees Page

## 14.4 Managing Employees

The **Employees** module enables you to:

- Add employees
- View employee details
- Modify employee details
- Delete employee details
- Download employee vCards

To add a new employee, click the **Add Employee** link located at the top of the page, as shown in [Figure 14.2](#). An employee form is displayed, as shown in [Figure 14.3](#).

The only mandatory field is the **Last Name**. The values in the **Department** options can be modified in the **Admin** module. The users of ConcourseSuite can communicate with their customers through:

- Primary phone number
- Email address
- Postal address

---

**Note:** Ensure the employee detail is entered carefully as it makes up the employee record while searching. The information entered can be changed at any time.

---


The screenshot shows a web-based form for adding an employee record. The form is titled "Company" and has a breadcrumb "Company > View Employees". At the top, there are three buttons: "Save", "Save & New", and "Cancel". Below these is a yellow header "Add Employee Record". The form fields are: "First Name" (text input), "Middle Name" (text input), "Last Name" (text input with a red asterisk), "Department" (dropdown menu showing "-- None --"), "Additional Names" (text input), "Nickname" (text input), "Birthday" (text input with a calendar icon), "Title" (text input), and "Role" (text input). At the bottom, there is a note: "Note: All international phone numbers must be preceded by a \"+\" symbol."

**Figure 14.3 Adding Employee Details**

After entering the information, you can:

- save the record by clicking **Save**.
- save the record and begin entering another employee on a new page by clicking **Save and New**.
- quit from the screen without saving by clicking **Cancel**.

The **View Employees** page displays a list of employees in alphabetical order. The criterion for sorting can be modified by clicking the column headers. For example, clicking **Department** results in a listing sorted by department.

When you click , a context menu is displayed with options to perform the following operations on an existing employee record, as shown in [Figure 14.4](#):

- **View Details** - enables you to view details of an employee.
- **Modify** - enables you to modify details of an employee.
- **Delete** - enables you delete employee record from the list.
- **Download vCard** - enables you to download an employee contact vCard.

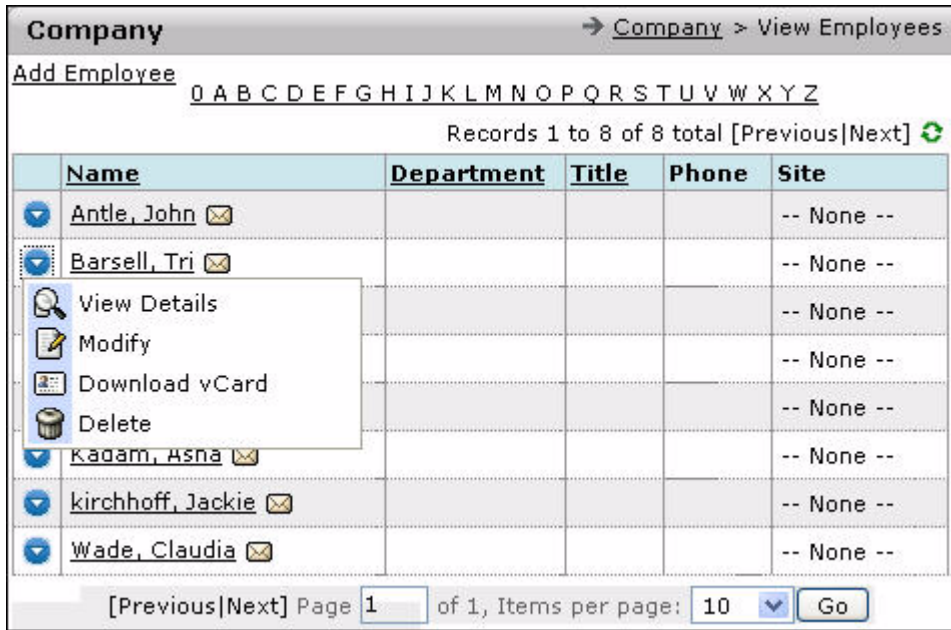


Figure 14.4 Viewing the Employee Page with the Context Menu

---

**Note:** All users do not have permission to perform all actions.

---

### 14.4.1 Viewing Employee Details

Click **View Details** on the context menu. A page containing the employee details is displayed. You can modify details or delete the record, as shown in [Figure 14.5](#). This page also displays options that suggest the preferences for being contacted. For more details, refer to [Section 4.4.1, “Understanding the Contact Preference Icons”](#).

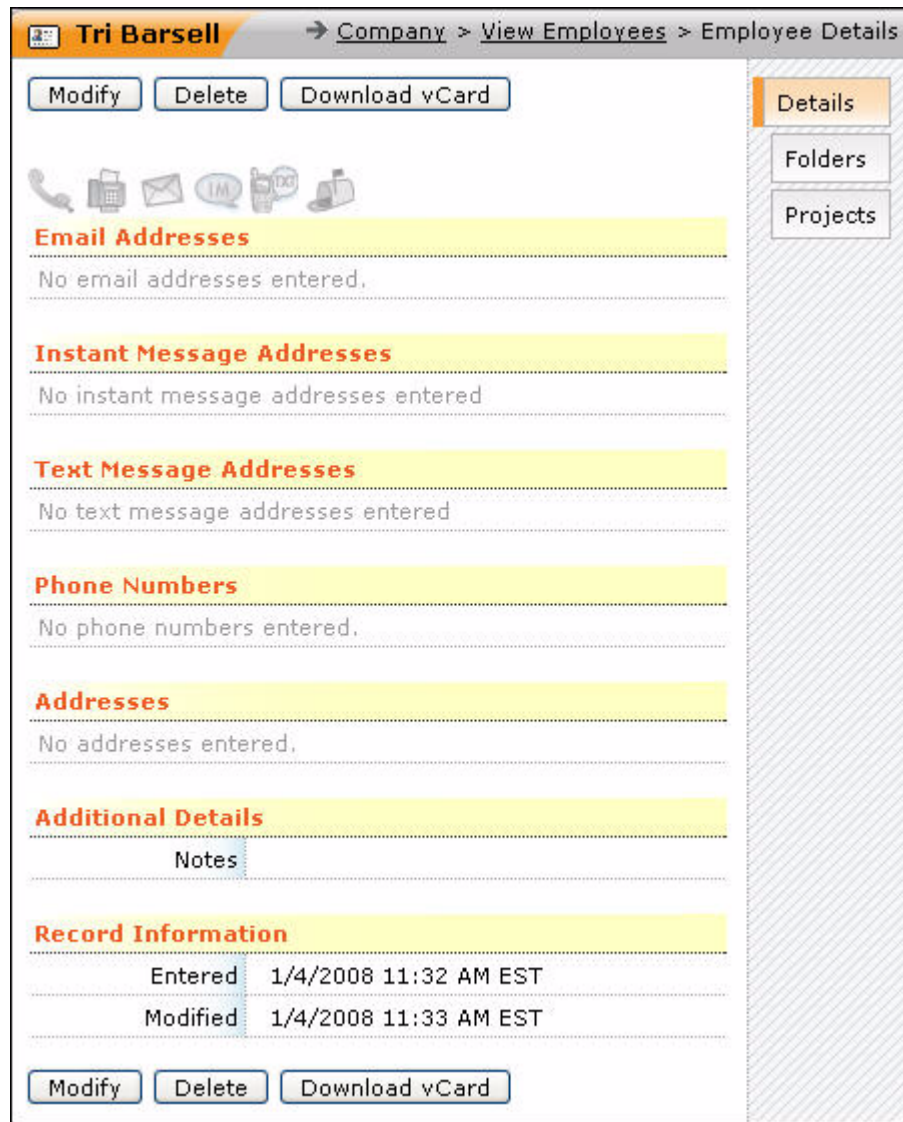


Figure 14.5 The Employee Details Page

## 14.4.2 Modifying Records

Selecting **Modify** by right-clicking the context menu, shown in [Figure 14.4](#), or clicking the **Modify** button on the **Employee Details** page displays a page shown in [Figure 14.6](#). You are allowed to edit the information on this page. Click **Update** to commit the changes or **Cancel** to abort.

Tri Barsell → Company > View Employees > Employee Details > Modify Employee

Update Cancel

**Update Employee Record**

First Name: Tri

Middle Name:

Last Name: Barsell \*

Department: -- None --

Additional Names:

Nickname:

Birthday:

Title:

Role:

Note: All international phone numbers must be preceded by a "+" symbol.

**Phone Numbers**

Phone1: Business ext. Primary

Phone2: Business ext. Primary

Phone3: Business ext. Primary

No Phone Calls Please

No Faxes Please

**Email Addresses**

Email 1: Business Primary

Email 2: Business Primary

Email 3: Business Primary

No Email Please

Details  
Folders  
Projects

Figure 14.6 Modify Employee Details

### 14.4.3 Deleting Records

To delete an employee record from the list, click **Delete** on the context menu, as shown in [Figure 14.4](#) or the **Delete** button on the **Employee Details** page. A pop-up is displayed warning you of the responsibilities, such as a contact or an opportunity attached to the employee.

Even after an employee record is deleted, the responsibility still remains in the **Contact** module. Though the owner column for that contact has the ex-employee's name, it is just a reference and has no bearing on the contact.

## 14.5 Downloading a vCard

The **Download vCard** feature is described in detail in the **Contacts** module. For more details, refer to "Downloading a vCard" under [Section 5.3.1, "Viewing Contact Search Results"](#).

### 14.5.1 Viewing Folders

The **Employees Folders** are similar to folders in other modules. You can store a variety of information about employees by configuring custom folders.

### 14.5.2 Adding Projects

The **Projects** feature for an employee provides details of projects in which the employee is involved. The **Projects** page, as shown in [Figure 14.7](#), can be accessed by clicking the **Projects** sub-tab on the **Employee Details** page displaying the following details:

- **Start Date** - displays the date on which the project began.
- **Project Name** - displays the project title.
- **Progress** - displays the status of activities pertaining to the project.

Start Date	Project Name	Progress
1/4/2008	ConcourseSuite 5.1	Progress: <div style="width: 0%;"></div> (0 activities)

**Figure 14.7 The Projects Page**

Clicking the project displays the project details of which the employee is a member.





## Viewing Reports

This chapter provides information about the **Reports** module of ConcourseSuite. This module helps you examine and display data, in the form of reports, in ConcourseSuite.

This chapter consists of the following sections:

- ❑ [Section 15.1, “How Does This Module Help You?”](#)
- ❑ [Section 15.2, “Accessing the Reports Page”](#)
- ❑ [Section 15.3, “Viewing Report Queue”](#)
- ❑ [Section 15.4, “Creating Reports”](#)
- ❑ [Section 15.5, “Adding Report Parameters”](#)

### 15.1 How Does This Module Help You?

This module provides a report system that enables you to:

- Gather data
- Sort data
- Combine data
- Display data

The data can be in any format. You can generate reports in PDF, HTML, CSV, or Excel formats as per your requirement. The Report Writer feature enables you to create custom reports at reasonable rates. These custom reports contain not only data, but also your logo, and other related graphics. Reports in ConcourseSuite have rich multimedia capabilities and produce professional outputs.

### 15.2 Accessing the Reports Page

The **Reports** module can be accessed by clicking the **Reports** link, as shown in [Figure 15.1](#).

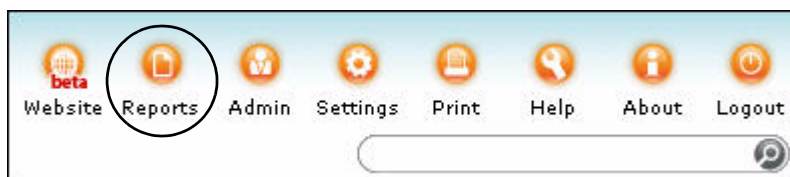


Figure 15.1 Accessing the Reports Module

## 15.3 Viewing Report Queue

Generating reports requires complex, processor-intensive and disk-intensive queries to various parts of the ConcourseSuite database. A report queue system helps you generate reports without affecting the normal usage of the system. The queue lets you access your report as soon as it is generated. If some reports need to be executed before your report, then you may have to wait. The **Reports -> Queue** page is shown in [Figure 15.2](#).

In a new system, there will be no reports in queue or reports ready for viewing.

Subject	Date	Status	Size
Account Folders	11/19/2007 6:15 AM EST	Ready to download	12 K

Figure 15.2 Reports Main Page - Queued Reports

---

**Caution:** All generated reports are deleted from the server every 24 hours. Ensure you download all the reports that you may require in future.

---

## 15.4 Creating Reports

To create a new report, click **Add** located at the top on the menu bar, or click the **Add a Report** link, as shown in [Figure 15.2](#).

Clicking **Add** displays a page allowing you to select from the modules for which reports are available, as shown in [Figure 15.3](#).

Clicking a module name displays a page listing all the available reports for that module. The base system is delivered with numerous reports covering all the modules.

Reports <span style="float: right;">→ <a href="#">Reports</a> &gt; <a href="#">Queue</a> &gt; <a href="#">Modules</a></span>	
To add a report to the queue, choose a module to see a list of corresponding reports:	
Module	
<a href="#">Accounts</a>	
<a href="#">Admin</a>	
<a href="#">Communications</a>	
<a href="#">Company</a>	
<a href="#">Contacts</a>	
<a href="#">Help Desk</a>	
<a href="#">Leads</a>	
<a href="#">My Home Page</a>	
<a href="#">Pipeline</a>	

**Figure 15.3 Select Module to Add Report**

For example, if you select the **Pipeline** module, a report list page is displayed, as shown in [Figure 15.4](#). You can select a report from the list.

Reports <span style="float: right;">→ <a href="#">Reports</a> &gt; <a href="#">Queue</a> &gt; <a href="#">Modules</a> &gt; <a href="#">Pipeline</a></span>	
Choose a report from the following list, the next step will be to set criteria for the report:	
Title	Description
<a href="#">Opportunities by Account</a>	What are all the accounts associated with my opportunities?
<a href="#">Opportunities by Owner</a>	What are all the opportunities based on ownership?
<a href="#">Opportunities by Stage</a>	What are my upcoming opportunities by stage?
<a href="#">Opportunity Contacts</a>	Who are the contacts of my opportunities?

**Figure 15.4 Reports List**

The page lists the report titles and a short description for each report. Click a report name and the **Parameters** page is displayed, as shown in [Figure 15.5](#). On this page, you can enter:

- Begin and end dates
- Source
- Probability
- Stage
- Subject

You can generate reports in the following formats:

- PDF

- HTML
- CSV
- Excel

Select the option **Save this criteria for generating future reports**, if you want to save the parameter settings for future reports.

After entering the required details, click **Generate Report**.

→ [Reports](#) > [Queue](#) > [Modules](#) > [Pipeline](#) > [Criteria List](#) > Parameters

**Opportunities by Stage:** What are my upcoming opportunities by stage?  
The following parameters must be specified for this report:

**Parameters**

Probability	All	*
Source	My Records	*
Stage	Any	*
Begin Date		*
End Date		*

**Name the criteria for future reference**

Settings	<input type="checkbox"/> Save this criteria for generating future reports
Subject	

**Report Type and Email Preference**

Report Type:  PDF  HTML  CSV  Excel

**Figure 15.5 Report Parameters/Generate Report**

Clicking **Generate Report** displays a page confirming that the report has been added to the queue. You can view the report queue on your dashboard by clicking **View Queue**, as shown in [Figure 15.6](#).

**Reports** → [Reports](#) > [Queue](#) > [Modules](#) > [Pipeline](#) > [Criteria List](#) > [Parameters](#) > Report Added

The following report has been added to the report queue. The report can be retrieved from the [queue](#) once the server has finished processing the report.

**Report Added to Queue**

Module	Pipeline
Title	Opportunities by Stage
Description	What are my upcoming opportunities by stage?
Queue Position	1 of 1

[View Queue](#)

**Figure 15.6 Report Queued**

Consider another example. If you select the **Accounts** module, a report list page is displayed, as shown in [Figure 15.7](#).

→ [Reports](#) > [Queue](#) > [Modules](#) > [Accounts](#)

Choose a report from the following list, the next step will be to set criteria for the report:

Title	Description
<a href="#">Account Contacts</a>	Who are the contacts in each account?
<a href="#">Account Folders</a>	What is the folder data for each account?
<a href="#">Accounts by Contract End Date</a>	Which accounts are expiring?
<a href="#">Accounts by Date Added</a>	What are my recent accounts?
<a href="#">Accounts by Type</a>	What are my accounts by type?
<a href="#">Action Plan Activity</a>	What are the action plan activities by date for each account?
<a href="#">Action Plan Summary</a>	What is the action plan summary for each account?
<a href="#">Current Accounts</a>	What are my current accounts?

**Figure 15.7 Viewing the Report List - Accounts Module**

For example, select the option **Action Plan Activity**, as shown in [Figure 15.7](#). The **Parameter** page is displayed, as shown in [Figure 15.8](#).

**Reports** → [Reports](#) > [Queue](#) > [Modules](#) > [Accounts](#) > [Criteria List](#) > Parameters

**Action Plan Activity:** What are the action plan activities by date for each account?

The following parameters must be specified for this report:

**Parameters**

Date Range	Custom... *
Submitted From	All
Submitted To	Today
	Last 24 hours
	Last 48 hours
	Last 7 days
	Last 14 days
	Last 30 days
	This year
Settings	Custom... *
Subject	

**Name the criteria** **Preference**

Settings Custom... \*

Subject

**Report Type and Email Preference**

Report Type  PDF  HTML  CSV  Excel

**Figure 15.8 The Parameters Page**

This page enables you to select the following details:

- **Date Range** - Enables you to select relative date ranges for the reports from the following options:
  - **All** - generates a report with all the action plan activities for each account.
  - **Today** - generates a report with action plan activities for each account for the current day.
  - **Last 24 hours** - generates a report with action plan activities for each account for the last 24 hours.
  - **Last 48 hours** - generates a report with action plan activities for each account for the last 48 hours.
  - **Last 7 days** - generates a report with action plan activities for each account for the last 7 days.
  - **Last 14 days** - generates a report with action plan activities for each account for the last 14 days.
  - **Last 30 days** - generates a report with action plan activities for each account for the last 30 days.
  - **This Year** - generates a report with action plan activities for each account for the current year.
  - **Custom** - generates a report with action plan activities for each account for a specified date ranges.

- **Submitted From and Submitted To** - These options enable you to select the date range using the date widget, as shown in [Figure 15.9](#). This option is enabled only if you select **Custom** as the parameter for **Date Range**.

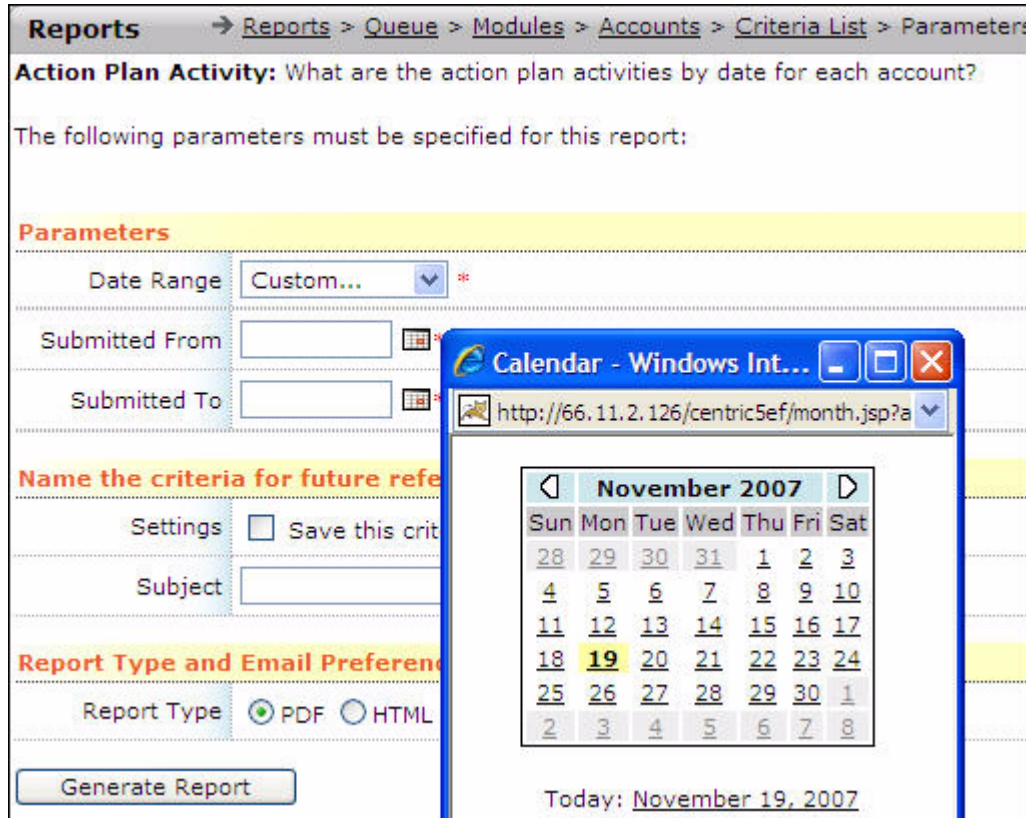


Figure 15.9 Specifying the Custom Date Range

- **Settings** - Select **Save this criteria for generating future reports**, if you want to save the parameter settings for future reports.
- **Subject** - Enter a subject for this report.
- **Report Type** - Specify the report type.

After entering the required details, click **Generate Report**. The **Report Queue** page is displayed, as shown in [Figure 15.10](#).

**Reports** → Reports > Queue > Modules > Accounts > Criteria List > Parameters > Report Added

The following report has been added to the report queue. The report can be retrieved from the [queue](#) once the server has finished processing the report.

**Report Added to Queue**

Module	Accounts
Title	Action Plan Activity
Description	What are the action plan activities by date for each account?
Queue Position	1 of 1

[View Queue](#)

**Figure 15.10 Viewing the Report Queue**

Click **View Queue** to access the list of generated reports and the reports scheduled to be processed by server, as shown in [Figure 15.11](#).

Generated reports ready to be retrieved Records: 3


Subject	Date	Status	Size
Action Plan Activity	11/19/2007 6:59 AM EST	Ready to download	17 K
View as PDF	11/19/2007 6:48 AM EST	Ready to download	14 K
Download PDF	11/19/2007 6:15 AM EST	Ready to download	12 K
Delete			

Reports scheduled to be processed by server Records: 0

Subject	Date	Status
No reports found		

[Refresh](#)

**Figure 15.11 Viewing the Report List**

Click  and select **Download PDF** to download the report. Select **View as PDF** to view the report or **Delete** to delete the report.

## 15.5 Adding Report Parameters

Some reports require parameters. For example, a trouble ticket report might require a date range, or some contact reports might require you to select the type(s) of contacts you want to include in your report.

Complex custom reports might require you to select different parameters. The reports included with ConcourseSuite are mostly simple reports with only a few parameters.

The parameters usually available for a report are:

- A pair of dates to set the beginning and ending of opportunities you want to view
- A probability to further filter the opportunities



- The source of the opportunities, either yours or all those in your hierarchy
- The stage of the opportunities you want to view

You can also save the basic parameters of any report that might be needed to generate a similar report in the future by selecting the option at the bottom. The next time you want to create a report of this type, you will be allowed to use the saved parameters.


## 15.5.1 Cancelling Reports

You can cancel a report you have submitted to the queue before it is run. Clicking  to view the context menu, as shown in [Figure 15.12](#) and select **Cancel Report**.



Figure 15.12 Cancelling a Report

## 15.5.2 Examining Your Reports

Clicking  from the **Reports** dashboard displays a context menu, as shown in [Figure 15.2](#). If your browser can automatically view the generated documents (PDF, HTML, CSV, or Excel), select **View as PDF** (if the report is in PDF format). If not, select **Download as PDF** to download the report file to your hard disk for viewing.

---

**Note:** If the report is in excel, CVS, or HTML format pagination is suppressed. All records, therefore, are displayed on one page unlike the report in the PDF format.

---



## Configuring the Application

This chapter provides information about the **Admin** module of ConcourseSuite. This module helps the administrator control the global aspects of the system, such as users, roles, modules, and global parameters. The administrator can also check the system usage using this module.

This chapter consists of the following sections:

- ❑ [Section 16.1, “How Does This Module Help You?”](#)
- ❑ [Section 16.2, “Viewing the Admin Page”](#)
- ❑ [Section 16.3, “Managing Users”](#)
- ❑ [Section 16.4, “Managing Roles”](#)
- ❑ [Section 16.5, “Adding Groups”](#)
- ❑ [Section 16.6, “Managing Portal Roles”](#)
- ❑ [Section 16.7, “Configuring Modules”](#)
- ❑ [Section 16.8, “Configuring the System”](#)
- ❑ [Section 16.9, “Checking System Usage”](#)

### 16.1 How Does This Module Help You?

The **Admin** module enables you to configure global system preferences, if you have the right permissions, and the **Home Page** module enables you to configure your personal preferences. Access to the **Admin** module should be granted sparingly because changes made in this module affect all users.

The **Admin** module enables an administrator to perform the following tasks:

- Add and modify users
- Add and modify roles
- Modify ConcourseSuite modules
- Add and modify custom folders in many modules
- Edit the system lookup lists in every module
- Edit global parameters that affect overall system operation
- Check system usage

## 16.2 Viewing the Admin Page

You can access this module by clicking the **Admin** link located on the top right corner of the page, along with the **Print**, **Help**, and **Logout** options (above User information), as shown in [Figure 16.1](#).

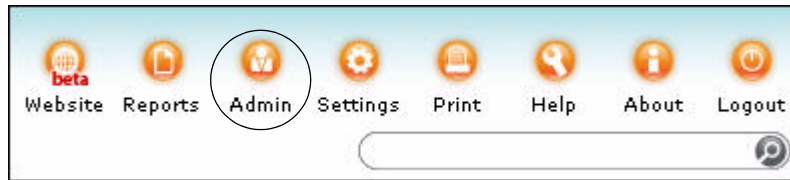


Figure 16.1 The Admin Link

Most installations of ConcourseSuite allow only limited access to this module, so you may not be able to view all the options.

Click **Admin** to select the action you want to perform. The **Admin** main page is displayed, as shown in [Figure 16.2](#).

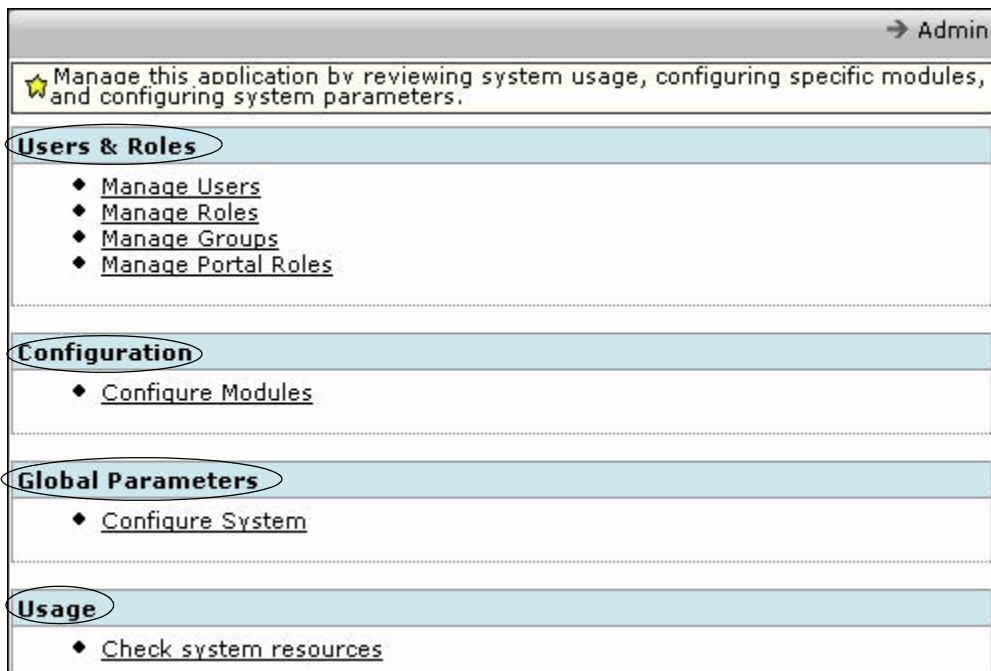


Figure 16.2 The Admin Main Page

### 16.2.1 Accessing the Admin Module

A user is defined as a person who is able to log in to ConcourseSuite. Every user of ConcourseSuite is assigned a role, defining exactly what a user can do within the system. ConcourseSuite contains several pre-defined roles that you can modify or delete, and add additional roles.


---

**Note:** Users in ConcourseSuite Enterprise and ConcourseSuite Hosted editions must be licensed. Active users count against the number of seats you have licensed. Inactive users cannot log in to the system, and hence do not take up any seat licenses.

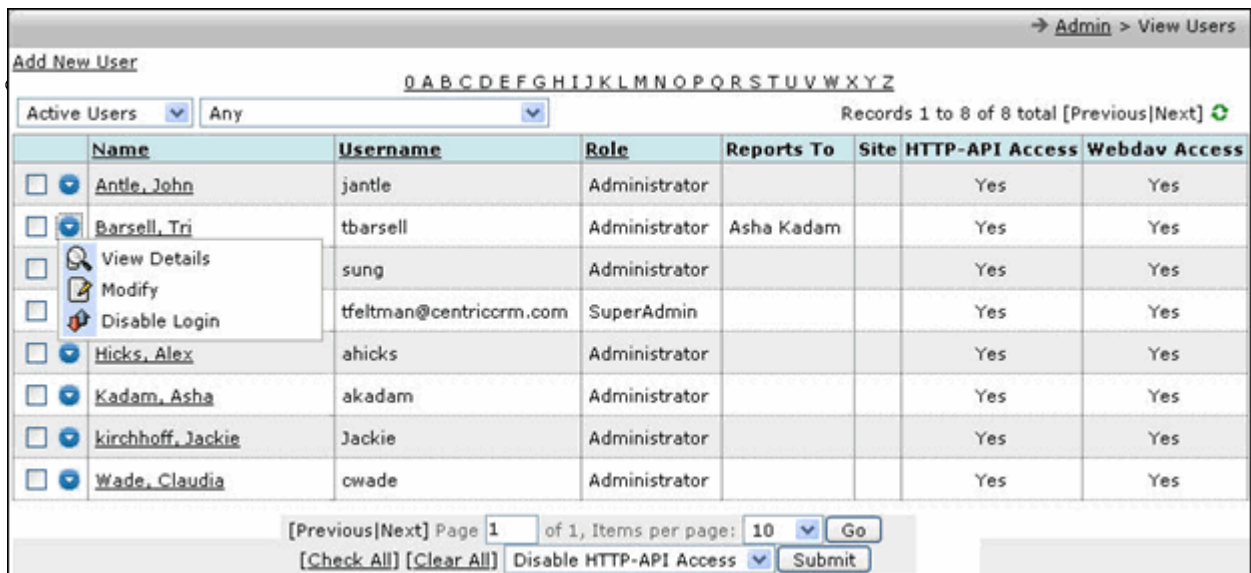
---

## 16.3 Managing Users

You can modify or add users by clicking the **Manage Users** link on the **Admin** page.

The **View Users** page is displayed, as shown in [Figure 16.3](#). This page lists all the users. Clicking  displays a context menu with options to perform the following tasks:


- Add new users
- Modify existing user details
- Disable users




→ Admin > View Users

Add New User

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Active Users  Any  Records 1 to 8 of 8 total [Previous|Next] 

	Name	Username	Role	Reports To	Site	HTTP-API Access	Webdav Access
<input type="checkbox"/>	<a href="#">Antle, John</a>	jantle	Administrator			Yes	Yes
<input type="checkbox"/>	<a href="#">Barsell, Tri</a>	tbarsell	Administrator	Asha Kadam		Yes	Yes
<input type="checkbox"/>		sung	Administrator			Yes	Yes
<input type="checkbox"/>		tfeltman@centricorm.com	SuperAdmin			Yes	Yes
<input type="checkbox"/>	<a href="#">Hicks, Alex</a>	ahicks	Administrator			Yes	Yes
<input type="checkbox"/>	<a href="#">Kadam, Asha</a>	akadam	Administrator			Yes	Yes
<input type="checkbox"/>	<a href="#">kirchhoff, Jackie</a>	Jackie	Administrator			Yes	Yes
<input type="checkbox"/>	<a href="#">Wade, Claudia</a>	cwade	Administrator			Yes	Yes

[Previous|Next] Page 1 of 1, Items per page: 10

[Check All] [Clear All] Disable HTTP-API Access

Figure 16.3 User List

### 16.3.1 Adding a New User

You can add new users in ConcourseSuite to use the application. These users can be employees or contacts who can access the application.

To add a new user:

1. Click **Add New User**, as shown in [Figure 16.3](#).

The **Add User** page is displayed, as shown in [Figure 16.4](#).

→ [Admin](#) > Add User

**Add a user account**

Contact: None Selected \* [\[Select Contact\]](#) [\[Create new contact\]](#)

Unique Username: John Dave \*

Generate new Password:  A new password will be created and emailed to the user. Contact email address is required for this option.

Password: \*\*\*\*\* \*

Password (again): \*\*\*\*\* \*

Role: Customer Service Manager \*

Reports To: Barsell, Tri

Access:  Allow Webdav Access  
 Allow HTTP-API Access

Expire Date: 1/7/2010

Figure 16.4 Adding a New User

2. Enter a unique user name for the user. Select the **Generate New Password** option and enter a password, shown in [Figure 16.5](#).

Generate new Password  A new password will be created and emailed to the user. Contact email address is required for this option.

Figure 16.5 Generating a New Password

3. Click **Add User**, after entering all the relevant details.  
The **View Details** page is displayed showing the details of the new user, as shown in [Figure 16.6](#).

Mr. Tri Nguyen Barsell → [Admin](#) > [View Users](#) > User Details

**Primary Information** [ [Employee Link](#) ]

Username: tbarsell

User Group (Role): superadmin

Site:

Reports To:

Last Login: 11/20/2007 4:38 PM

Account Expires On:

Details

Login History

Viewpoints

Groups

Figure 16.6 Viewing the New User Details

## 16.3.2 Viewing and Modifying User Details

You can view user details by selecting **View Details** from the context menu, as shown in [Figure 16.3](#), or clicking a name. The following details are displayed on the **User Details** page, as shown in [Figure 16.7](#).

- Username
- User Group (Role)
- Person to whom the user reports
- Last Login date
- User account expiry date

The screenshot shows a web interface for user management. At the top, the user's name 'Mr. Tri Nguyen Barsell' is displayed in an orange header, followed by a breadcrumb trail: 'Admin > View Users > User Details'. Below the header are two buttons: 'Modify' and 'Disable'. The main content area is titled 'Primary Information [ Employee Link ]' and contains a table of user details:

Username	tbarsell
User Group (Role)	superadmin
Site	
Reports To	
Last Login	11/20/2007 4:38 PM
Account Expires On	

At the bottom of the main content area are two more buttons: 'Modify' and 'Disable'. On the right side, there is a vertical sidebar with a shaded background, containing four buttons: 'Details', 'Login History', 'Viewpoints', and 'Groups'.

Figure 16.7 The User Details Page

Selecting **Modify** on the **User Details** page, displays the **Modify User** page, as shown in [Figure 16.8](#), which enables you to modify the following details:

- Modify the username and role
- Report account expiration
- Modify the user's password

Mr. Tri Nguyen Barsell → Admin > View Users > User Details > Modify User

Update Cancel Disable

**Modify Primary Information**

Unique Username: tbarsell \*

Role (User Group): superadmin \*

Site: -- None --

Reports To: -- None --

Access:
 

- Allow Webdav Access
- Allow HTTP-API Access

Expire Date:

Generate new password:  No Contact Email Address found. Please add one.

Update Cancel Disable

Details

Login History

Viewpoints

Groups

Figure 16.8 The Modify User Page

Selecting the **Generate new password** option sends an email to you with the newly created password.

### 16.3.3 Viewing Login History

Clicking the **Login History** sub-tab on the **Modify Users** page displays the **Login History** page, as shown in [Figure 16.9](#). This page displays login details, such as the date of login, time of login, and login IP address.

Mr. Tri Nguyen Barsell → Admin > View Users > User Details > Login History

Records 1 to 7 of 7 total [Previous|Next] ↻

Username	Login IP Address	Date/Time
tbarsell	70.169.133.146	11/20/2007 4:38 PM
tbarsell	70.169.133.146	11/19/2007 12:40 PM
tbarsell	70.169.133.146	11/15/2007 5:04 PM
tbarsell	70.169.133.146	11/9/2007 1:11 PM
tbarsell	70.169.133.146	11/9/2007 12:17 PM
tbarsell	70.169.133.146	11/9/2007 11:54 AM
tbarsell	70.169.133.146	11/8/2007 3:26 PM

[Previous|Next] Page 1 of 1, Items per page: 10 Go

Details

Login History

Viewpoints

Groups

Figure 16.9 Login History



## 16.3.4 Using Viewpoints

**Viewpoints** allow one user to view another user's pipeline data. This feature enables someone who is not in your direct line of reports (hierarchy) to be visible to you.

Select the user to whom you want to give a different viewpoint. Clicking **Viewpoints** on the **User Detail page** displays the **Viewpoints** page, as shown in [Figure 16.10](#).



Figure 16.10 The Viewpoints Page

You can add new viewpoints by clicking the **Add New Viewpoint** link. The **Add Viewpoint** page is displayed allowing you to modify or delete existing viewpoints, and create new ones, as shown in [Figure 16.12](#).

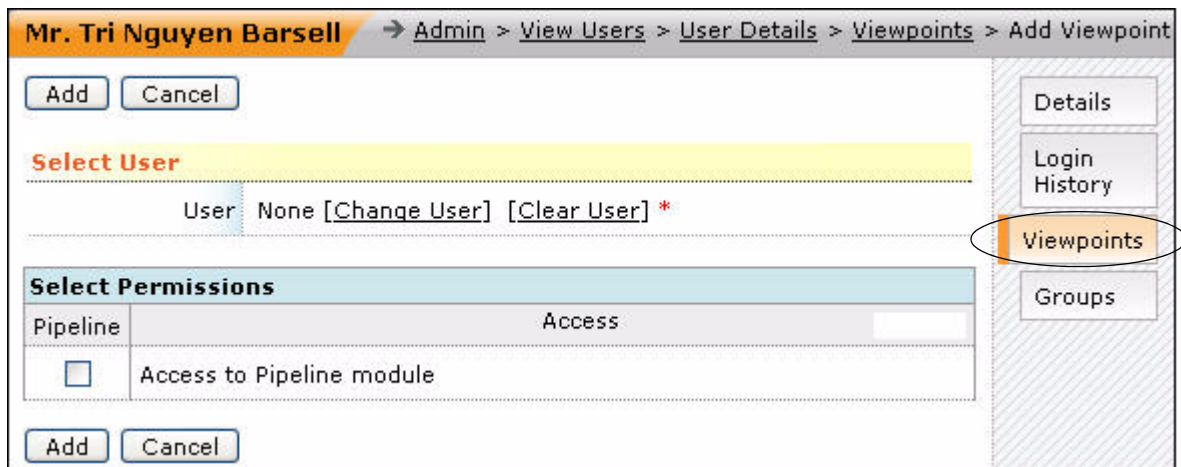


Figure 16.11 The Add Viewpoint Page

Select the user whose data you want the current user to view, and specify the access permission for the module you want the user to access. Clicking **Add** takes you to the **Viewpoints** page with the details of the new viewpoint, as shown in [Figure 16.12](#).

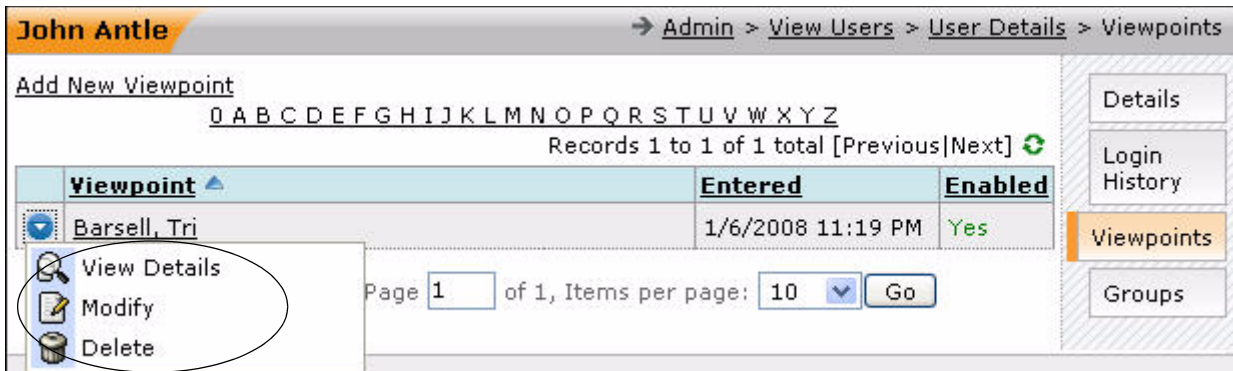



Figure 16.12 The Viewpoints Page

On this page, when you click  beside the new viewpoint, a context menu is displayed with the options to view, modify, and delete the viewpoint. Since the viewpoint specified above gives access to the **Pipeline** module, you can view the viewpoint on the **Dashboard** page of the **Pipeline** module. The dashboard view of the opportunities is shown in [Figure 16.13](#).

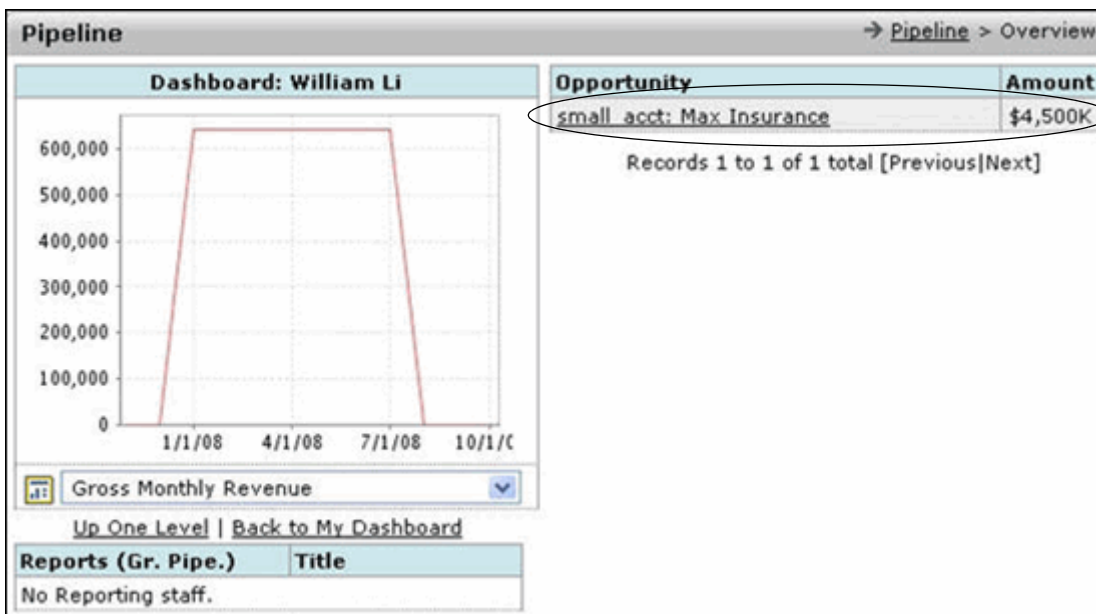


Figure 16.13 Viewing Viewpoints in the Pipeline Dashboard

## 16.4 Managing Roles

Roles control what users can view, create, modify, and delete on the system. Each user is assigned only one role for a department. Hence, a user can have any number of roles, depending on the number of departments. For example, you may create one role for sales, one for marketing, and one for customer support.

You can configure roles by module, and define rights for the following tasks:


- View data in the system

- Add data to the system
- Edit data in the system
- Delete data in the system

You can navigate to the roles section by clicking **Manage Roles** from the **Admin** page. This displays a page that lists all the roles currently defined in the system, and provides the opportunity to add new roles, as shown in **Figure 16.14**.

Role	Description	# of users
Accounting Manager	Reviews revenue and opportunities	0
Administrator	Performs system configuration and maintenance	7
Customer Service Manager	Manages all tickets	0
tentative	Manages own tickets	0
tentative	Manages employee information	0
tentative	Manages communications	0
Operations Manager	Manages operations	0
Sales Manager	Manages all accounts and opportunities	0
Salesperson	Manages own accounts and opportunities	0
SuperAdmin	Has all permissions set	1

**Figure 16.14 The View Roles Page**

Clicking  located at the left of each role, displays a context menu which provides options to modify, clone, or delete a role. You can create a new role by clicking the **Add New Role** link located at the top of the page. The **Add Role** page is displayed, as shown in **Figure 16.15**. This page enables you to configure permissions for the specified role. The **Check All** link and the **Clear All** link on this page enable you to select all the options. The **Clear All** link on this page enables you to deselect the selected options.

→ [Admin](#) > Add Role

### Add Role

Role Name \*

Description \*

#### Configure permissions for this role [\[Check All\]](#) [\[Clear All\]](#)

System	<a href="#">[Check All]</a> <a href="#">[Clear All]</a>	Access/ View	Add	Edit	Delete	Offline Access/ View	Offline Add	Offline Edit	Offline Delete
Access to Global Search		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Access to My Items		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Access to Recent Items		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
My Home Page	<a href="#">[Check All]</a> <a href="#">[Clear All]</a>	Access/ View	Add	Edit	Delete	Offline Access/ View	Offline Add	Offline Edit	Offline Delete
Access to My Home Page module		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
View Performance Dashboard		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Mailbox		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Tasks		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Re-assign Items		<input type="checkbox"/>	--	<input type="checkbox"/>	--	--	--	--	--
Profile		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Personal Information		<input type="checkbox"/>	--	<input type="checkbox"/>	--	<input type="checkbox"/>	--	--	--
Password		--	--	<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--
Action Lists		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plans		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboards		<input type="checkbox"/>	--	--	--	--	--	--	--

Figure 16.15 Adding New Roles

---

**Note:** The **Add Role** page contains more details, and a truncated form of the page is shown in [Figure 16.15](#).

---

Modifying an existing role, cloning a role, or adding a new role displays a page with a grid containing permissions that can be controlled and organized by the module. When you modify an existing role, the grid will contain the current permissions, but when you create a new role, all permissions are turned off by default. Select the checkboxes to turn permissions on or off.

Click **Modify** to access the **Update Role** page, as shown in [Figure 16.16](#). This page displays the modules and permissions for each part of the application separately.

Users can have offline access to the application depending on the permissions set on this page. You can set permission for offline access by enabling **Offline Access/View**, as shown in [Figure 16.16](#).

→ [Admin](#) > Add Role

**Add Role**

Role Name  \*

Description  \*

**Configure permissions for this role** [\[Check All\]](#) [\[Clear All\]](#)

System	<a href="#">[Check All]</a> <a href="#">[Clear All]</a>	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to Global Search		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Access to My Items		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Access to Recent Items		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
My Home Page	<a href="#">[Check All]</a> <a href="#">[Clear All]</a>	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to My Home Page module		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
View Performance Dashboard		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Mailbox		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Tasks		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Re-assign Items		<input type="checkbox"/>	--	<input type="checkbox"/>	--	--	--	--	--
Profile		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--
Personal Information		<input type="checkbox"/>	--	<input type="checkbox"/>	--	<input type="checkbox"/>	--	--	--
Password		--	--	<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--
Action Lists		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plans		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboards		<input type="checkbox"/>	--	--	--	--	--	--	--
Website	<a href="#">[Check All]</a> <a href="#">[Clear All]</a>	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to Website module		<input type="checkbox"/>	--	--	--	<input type="checkbox"/>	--	--	--

**Figure 16.16 Role Permissions Based on User Roles**

Clicking **Clone** displays the **Add Role** page. You can add a new role using this page.

## 16.4.1 Accessing Modules

To grant access to modules to a role in ConcourseSuite, you need to update the role. For example, the Accounting Manager is assigned a task to create a website for the organization. Therefore, the Accounting Manager needs to access the **Website (Beta)** module.

To access the **Website (Beta)** module:

1. Click **Manage Roles**.

The **View Roles** page is displayed, as shown in [Figure 16.17](#).



→ [Admin](#) > View Roles

[Add New Role](#)    0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 10 of 10 total [Previous|Next] ↻

Role ▲	Description	# of users
Accounting Manager	Reviews revenue and opportunities	0
Administrator	Performs system configuration and maintenance	3
Customer Service Manager	Manages all tickets	0
Customer Service Representative	Manages own tickets	0
HR Representative	Manages employee information	0
Marketing Manager	Manages communications	0
Operations Manager	Manages operations	0
Sales Manager	Manages all accounts and opportunities	0
Salesperson	Manages own accounts and opportunities	0
SuperAdmin	all permissions checked	7

[Previous|Next] Page 1 of 1, Items per page: 10 Go

**Figure 16.17 The View Roles Page**

2. Click **Accounting Manager**.

The **Update Role** page is displayed, as shown in [Figure 16.18](#).

→ Admin > View Roles > Update Role

Update Cancel

**Update Role**

Role Name Accounting Manager \*

Description Reviews revenue and opportunities \*

**Configure permissions for this role** [Check All] [Clear All]

System	[Check All] [Clear All]	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to Global Search		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Access to My Items		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Access to Recent Items		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
My Home Page	[Check All] [Clear All]	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to My Home Page module		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
View Performance Dashboard		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Mailbox		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Tasks		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Re-assign Items		<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	--	--	--	--
Profile		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Personal Information		<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>	--	--	--
Password		--	--	<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--
Action Lists		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Action Plans		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dashboards		<input checked="" type="checkbox"/>	--	--	--	--	--	--	--
Website	[Check All] [Clear All]	Access/View	Add	Edit	Delete	Offline Access/View	Offline Add	Offline Edit	Offline Delete
Access to Website module		<input checked="" type="checkbox"/>	--	--	--	<input checked="" type="checkbox"/>	--	--	--
Portfolio Editor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Site Editor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	--	<input checked="" type="checkbox"/>

Figure 16.18 The Update Role Page

To create and activate a website for the organization, the Accounting Manager must be able to Access, Add, Edit, and Delete a website in the **Website (Beta)** module.

3. Click the **Clear All** link to grant all the access to the **Website (Beta)** module.

Alternatively, you can select the respective options for the required access.

4. Click **Update**.

The **Website (Beta)** link is now displayed in the Account Manager's login.

## 16.5 Adding Groups

You can create groups of users with similar characteristics, for example, same department. When you click **Manage Groups** on the **Admin** page, the **Manage Groups** page is displayed, as shown in [Figure 16.19](#).



Figure 16.19 The Manage Groups Page

1. Click **Add New Group**.

The **Add Group** page is displayed, as shown in [Figure 16.20](#).



→ [Admin](#) > [Manage Groups](#) > Add Group

Save Cancel

### Add Group

Group Name  \*

Description

Site  ▾

Enabled

### Group Users

Add a user from:

Employees Accounts

Group Users:

(click user to remove)

Save Cancel

Figure 16.20 The Add Group Page

2. Enter a name for the group and select the **Enabled** option to make the group available.

You can add users from the **Company (Employees)** or **Accounts** modules. Users available in these modules are grouped under departments and account type, as shown in [Figure 16.21](#).

→ Admin > Manage Groups > Add Group

Save Cancel

### Add Group

Group Name: Sales Reps \*

Description: This group consists of all the sales reps across the globe.

Site: -- None --

Enabled:

### Group Users

Add a user from: Employees Accounts

Select a department: Without a department, Accounting, Administration, Billing, Customer Relations, Engineering, Finance, Human Resources, Legal, Marketing

Select a contact: Tri Barsell, new employee, feltman, Asha Kadam, Will Li, William Li, Tech Writer

Group Users: (click user to remove)

Save Cancel

Figure 16.21 Selecting Users for the Group

3. Click the names in the **Select a Contact** box to add users to the group.
4. Click **Save**.

The added group is displayed on the **Manage Groups** page, as shown in [Figure 16.22](#).

→ Admin > Manage Groups

Add New Group 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 2 of 2 total [Previous|Next] ↻

Name	Site	Entered	Users	Enabled
Mid-West Sales Group	-- None --	11/22/2007	3	true
	-- None --	11/8/2007	1	true

[Previous|Next] Page 1 of 1, Items per page: 10 Go

Figure 16.22 Viewing the Group on the Manage Group Page

You can perform the following actions on the groups:

- **View Details**

- **Modify**
- **Delete**

## 16.6 Managing Portal Roles

A portal user can be a customer or vendor of your company. Administrators can define roles and set permissions for portal users by providing access to a few modules and restrict permission to other modules. The administrator can specify access to **Accounts**, **Documents**, and **Projects** modules.

For example, consider a contact related to an account. This contact can view details pertaining to his account only.

This contact can:

- View account records, contact details, service contracts, assets, tickets, ticket activities, documents, project records, document modules, and document stores related to his account
- Add tickets and documents

This portal user is restricted permission to edit and delete any information.

The **Manage Portal Roles** section enables the administrator to specify these permissions.

---

---

**Note:** As per the license agreement, the number of active users for this system is restricted to five, however, portal users bypass this license agreement.

---

To specify permissions for portal users, click **Manage Portal Roles**, as shown in [Figure 16.23](#).

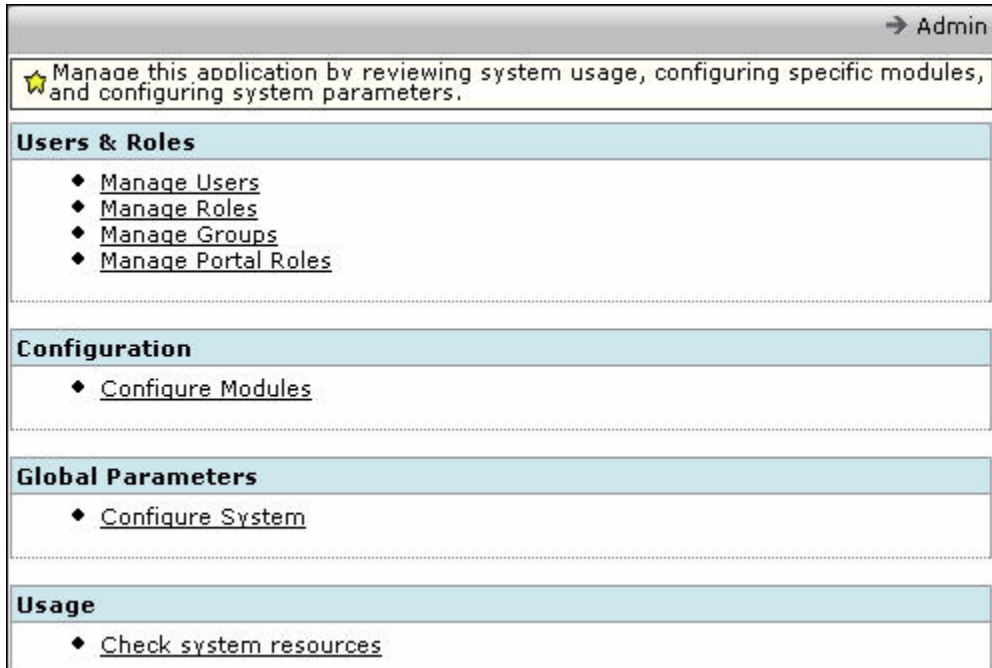


Figure 16.23 Viewing the Admin Page

The View Portal Roles page is displayed, as shown in Figure 16.24.

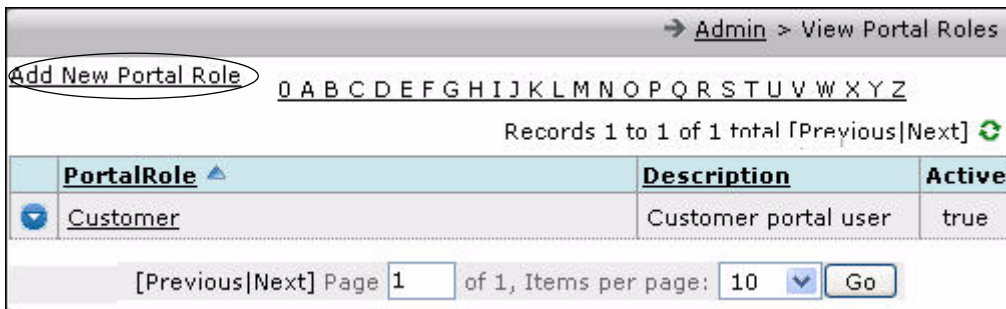


Figure 16.24 Viewing the View Portal Roles Page

### 16.6.0.1 Adding New Portal Roles

You can define new portal roles by specifying the permission to access the modules.

To add a new portal role:

1. Click **Add New Portal Role**, as shown in Figure 16.24.

The **Add Portal Role** page is displayed, as shown in Figure 16.25.

→ Admin > View Portal Roles > Add Portal Role

Add Cancel

### Add Portal Role

Portal Role Name  \*

Description  \*

Enabled

### Configure permissions for this role

Accounts	Access/ View	Add	Edit	Delete
Access to Accounts module	<input type="checkbox"/>	--	--	--
Account Records	<input type="checkbox"/>	--	--	--
Contacts	<input type="checkbox"/>	--	--	--
Service Contracts	<input type="checkbox"/>	--	--	--
Assets	<input type="checkbox"/>	--	--	--
Tickets	<input type="checkbox"/>	<input type="checkbox"/>	--	--
Ticket Maintenance Notes	<input type="checkbox"/>	--	--	--
Ticket Activities	<input type="checkbox"/>	--	--	--
Documents	<input type="checkbox"/>	<input type="checkbox"/>	--	--
Share Accounts Documents	<input type="checkbox"/>	--	--	--
Projects	Access/ View	Add	Edit	Delete
Access to Project Management module	<input type="checkbox"/>	--	--	--

Figure 16.25 Viewing the Add Portal Role Page

2. Enter name in the **Portal Role Name** field, a short description, and specify the permissions.

You can specify the permissions for the **Accounts**, **Projects**, and **Documents** modules.

3. Click **Add**.

The **View Portal** page with the name of the newly defined portal role is displayed, as shown in [Figure 16.26](#).

→ [Admin](#) > View Portal Roles

Add New Portal Role    [D](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Records 1 to 2 of 2 total [Previous|Next]

	<b>PortalRole</b> ▲	<b>Description</b>	<b>Active</b>
	<a href="#">Customer</a>	Customer portal user	true
	<a href="#">Vendor</a>	Vendor access	true

[Previous|Next] Page  of 1, Items per page:

Figure 16.26 Viewing the Newly Created Portal Role

## 16.7 Configuring Modules

The **Configure Module** feature enables you to modify and configure a variety of information and capabilities in many of the ConcourseSuite modules. Clicking **Configure Modules** on the **Admin** page displays the **Configure Module** page, as shown in [Figure 16.27](#).

★ Setup the system to meet the specific
<b>Modules</b>
<a href="#">Accounts</a>
<a href="#">Assets</a>
<a href="#">Communications</a>
<a href="#">Company</a>
<a href="#">Contacts</a>
<a href="#">Global Folders</a>
<a href="#">Help Desk</a>
<a href="#">Leads</a>
<a href="#">My Home Page</a>
<a href="#">Pipeline</a>
<a href="#">Product Catalog</a>
<a href="#">Quotes</a>
<a href="#">Service Contracts</a>
<a href="#">Website</a>

Figure 16.27 Configuring Modules

The capabilities currently provided by this module are:

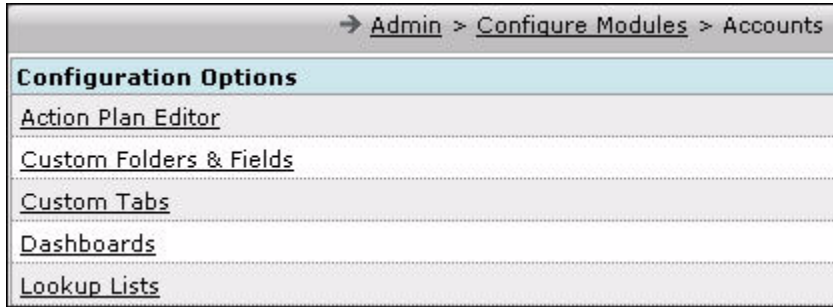
- **Accounts**, which enables you to configure:
  - Action Plan Editor
  - Custom Folders and Files

- Lookup Lists
- **Assets**, which enables you to configure:
  - Categories
  - Lookup Lists
- **Contacts**, which enables you to configure:
  - Custom Folders and Fields
  - Lookup Lists
- **Global Folders**, which enables you to configure:
  - Custom Folders and Fields
- **Company**, which enables you to configure:
  - Custom Folders and Fields
  - Lookup Lists
- **Help Desk**, which enables you to configure:
  - Action Plan Editor
  - Categories
  - Custom Folders and Fields
  - Lookup Lists
  - Object Events
  - Scheduled Events
- **Leads**, which enables you to configure the Lookup Lists
- **Pipeline**, which enables you to configure:
  - Custom Folders and Fields
  - Lookup Lists
- **Product Catalog**, which enables you to configure the Lookup Lists
- **Quotes**, which enables you to configure:
  - Lookup Lists
  - Logos
- **Service Contracts**, which enables you to configure Lookup Lists
- **Website**, which enables you to configure settings for the **Website (Beta)** module

## 16.7.1 Creating Custom Folders and Fields

This module enables you to create and use folders. Folders help you extend the database, and hence the functionality of ConcourseSuite without any programming. Folders provide interactive forms in which you can store information for later viewing, export, or reporting. On clicking **Accounts** on the **Configure Modules** page, the page displayed in [Figure 16.28](#) is displayed.

To create a new folder in the **Accounts** module, click **Configure Modules** and select **Accounts**. Click the **Custom Folders and Fields** link.



→ <a href="#">Admin</a> > <a href="#">Configure Modules</a> > <a href="#">Accounts</a>	
<b>Configuration Options</b>	
<a href="#">Action Plan Editor</a>	
<a href="#">Custom Folders &amp; Fields</a>	
<a href="#">Custom Tabs</a>	
<a href="#">Dashboards</a>	
<a href="#">Lookup Lists</a>	

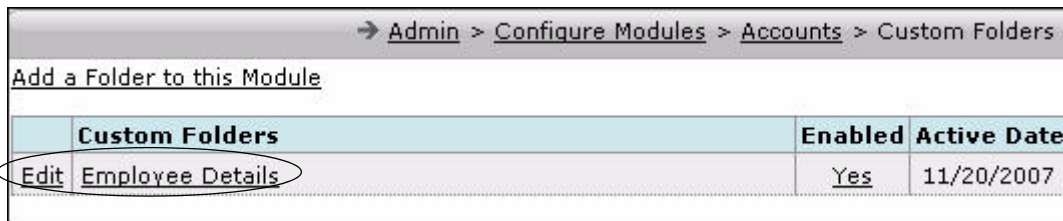
Figure 16.28 Configuration Options for Accounts

---

**Note:** To create folders accessible to all modules, click **Configure Modules** and select **Global Folders**, as shown in [Figure 16.27](#). Click the **Custom Folders and Fields** link. The steps to create folders are similar to creating folders in the **Accounts** module.

---

The page displayed may contain some folders already created, as shown in [Figure 16.29](#). Click **Add a Folder to this Module** to create a new folder.



→ <a href="#">Admin</a> > <a href="#">Configure Modules</a> > <a href="#">Accounts</a> > <a href="#">Custom Folders</a>			
<a href="#">Add a Folder to this Module</a>			
	<b>Custom Folders</b>	<b>Enabled</b>	<b>Active Date</b>
<a href="#">Edit</a>	<a href="#">Employee Details</a>	Yes	11/20/2007

Figure 16.29 Existing Custom Folders

The resulting page enables you to name the folder and select any/all of the following options, as shown in [Figure 16.30](#):



→ Admin > Configure Modules > Accounts > Custom Folders > New Folder

**Module:** Accounts

**Add a Folder**

Folder Name  \*

Records  This folder can have multiple records

Read Only  folder is read only by all users

Enabled  folder is visible to users

**Figure 16.30 Adding a New Folder to Module**

- **Records** - to signify whether the folder can have multiple records.  
If you have stored demographic data, you cannot have multiple records. If you have stored a record of faxes received from a customer, then you can select this option.
  - **Read Only** - to signify that the folder is read only.  
You can select this if ConcourseSuite is importing data from another application at regular intervals. You might want users to view the data, but not modify the same.
  - **Enabled** - to enable the folder, and make it visible to others.  
Do not select this option if you are using a folder for brainstorming and do not want other users to view it until you have finished.
- To edit information from a folder, click the folder name, or the **Edit** link to the left of folder name, as shown in [Figure 16.31](#). You can move a folder or delete it.

→ Admin > Configure Modules > Accounts > Custom Folders

**Module:** Accounts  
**Folder:** Employee Details

[Add a Group to this Folder](#)

[Edit](#) | [Del](#) | [Up](#) | [Down](#) | [Add a Custom Field](#)

Name	Enter Default values	Current Default values	Enabled	Active Date
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Up</a>   <a href="#">Down</a>   <a href="#">Add a Custom Field</a>				
<b>Date of Birth</b>	<b>Enter Default values</b>	<b>Current Default values</b>	<b>Enabled</b>	<b>Active Date</b>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Up</a>   <a href="#">Down</a>	Date of Birth*  Text Area (unlimited)		Yes	11/22/2007

**Figure 16.31 Folder Details**

Clicking a folder name displays the **Folder** page, as shown in [Figure 16.31](#). Folders enable you to build logical grouping of data fields. Add a group by clicking **Add a Group for this Folder**.

The **New Group** page is displayed, as shown in [Figure 16.32](#). Enter the name of the group and click **Save**.

→ Admin > Configure Modules > Accounts > Custom Folders > Folder > New Group

**Module:** Accounts  
**Folder:** Employee Details

**Add a Group**

Group Name \*

**Figure 16.32 The New Group Page**

The page refreshes and the group you created is displayed, as shown in [Figure 16.33](#), wherein you can edit, delete, and add custom fields. This page displays the name of the created group.

Module: Accounts  
Folder: Employee Details ▼

Add a Group to this Folder

Edit | Del | Up | Down | Add a Custom Field

Name	
Edit   Del   Up   Down   Add a Custom Field	
Date of Birth	Enter Default values
Edit   Del   Up   Down   Date of Birth*	

Edit | Del | Up | Down | Add a Custom Field

**Certificates**

Set default values for fields      Delete this folder and all fields

Figure 16.33 The Folder Page Displaying the New Group

Click **Add a Custom Field**, and the page that enables you to add a custom field is displayed, as shown in [Figure 16.34](#).

Fields that have a red asterisk next to them represent mandatory fields. You may create any custom field for other information. The **Additional Text to Display** field is optional and may be used to enter some additional information. Select the **Required at Data Entry** option if you require this field and want it to be displayed as **Enabled**. Clicking **Save** displays the folders with new fields that you have just created.

→ Admin > Configure Modules > Accounts > Custom Folders > Folder > New Field

**Module:** Accounts  
**Folder:** Employee Details

**Add a Custom Field**

Field Label	<input type="text"/> *
Field Type	Text (up to 255 characters) ▾ *
Field Length	<input type="text"/> *
Additional Text to Display	<input type="text"/>
Required at Data Entry	<input type="checkbox"/>

Save Cancel

Figure 16.34 Adding Custom Field

You can edit the field using the options, as shown in [Figure 16.35](#).

→ Admin > Configure Modules > Accounts > Custom Folders > Folder > New Field

**Module:** Accounts  
**Folder:** Employee Details

**Add a Custom Field**

Field Label	High School *
Field Type	Text (up to 255 characters) ▾ *
Field Length	Text (up to 255 characters)
Additional Text to Display	Text Area (unlimited)
Required at Data Entry	Lookup List
	Date
	Number
	Decimal Number
	Percent
	Currency
	Check Box
	Email Address
	URL
	Phone Number
	US State List

Save Cancel

Figure 16.35 Editing Fields

## 16.7.2 Configuring Dashboards

The settings for **Dashboards** that are available in different modules can be configured using the **Dashboards** option. One or more roles can be given access to the **Dashboards** page in different modules. For example, if you want to configure

the dashboard settings for the **Accounts** module, click **Accounts** on the **Configure Modules** page, as shown in [Figure 16.36](#).



**Figure 16.36** The Configure Modules Page

The **Accounts** page is displayed, as shown in [Figure 16.37](#).



**Figure 16.37** Configuring Accounts

Click **Dashboards**. The **Dashboards** page is displayed, as shown in [Figure 16.38](#). To add a new dashboard, click **Add Dashboard**.

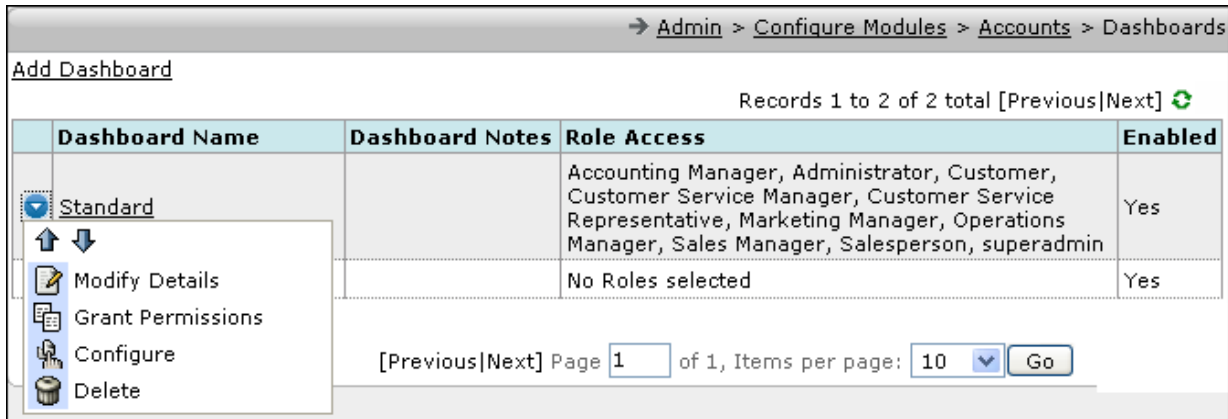


Figure 16.38 Accessing the Dashboards Page

The Add Dashboard page is displayed, as shown in Figure 16.39.

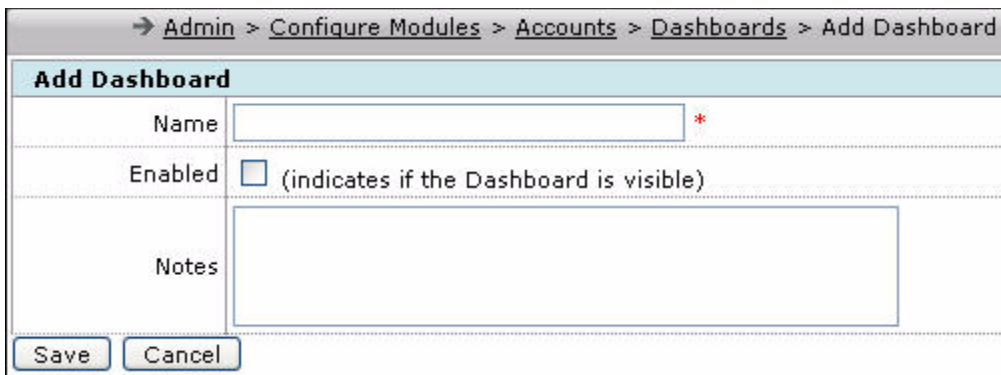



Figure 16.39 Adding Dashboards

Enter the relevant details and click **Save** to save the dashboard. When you click , as shown in Figure 16.38, the context menu displays the following options:

- **Modify Details** - to modify the details in the dashboard.
- **Grant Permissions** - to grant permissions.
- **Configure** - to configure settings for the dashboards.
- **Delete** - to delete a dashboard.

When you click **Configure**, the page displayed, as shown in Figure 16.40, contains two options **Row** and **Column** with action icons. When you click , a context menu is displayed. The following options are displayed:

- **Editing Portlets** - This option enables you to edit portlets. By default, the **HTML Content** portlet is selected. For more details, refer to Section 16.7.2.1, "Editing Portlets".
- **Replacing portlets** - This option enables you to replace portlets. For more details, refer to Section 16.7.2.2, "Replace Portlets".
- **Adding rows and columns** - This option enables you to add rows and columns.
- **Deleting** - Enables you to delete the current selection.

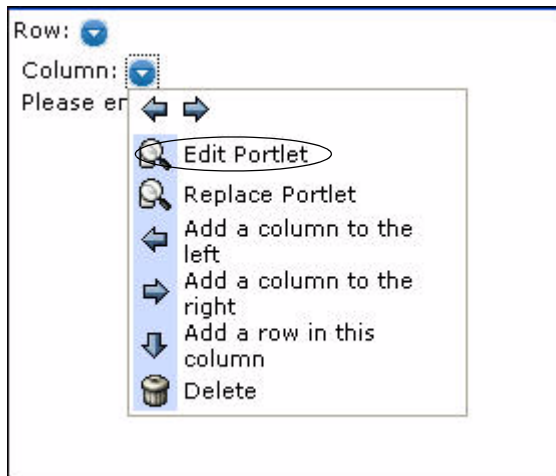


Figure 16.40 Configuring Settings for the Dashboards

### 16.7.2.1 Editing Portlets

The default selected portlet is **HTML Content**. Click **Edit Portlet** to make changes to the portlet, as shown in [Figure 16.40](#).

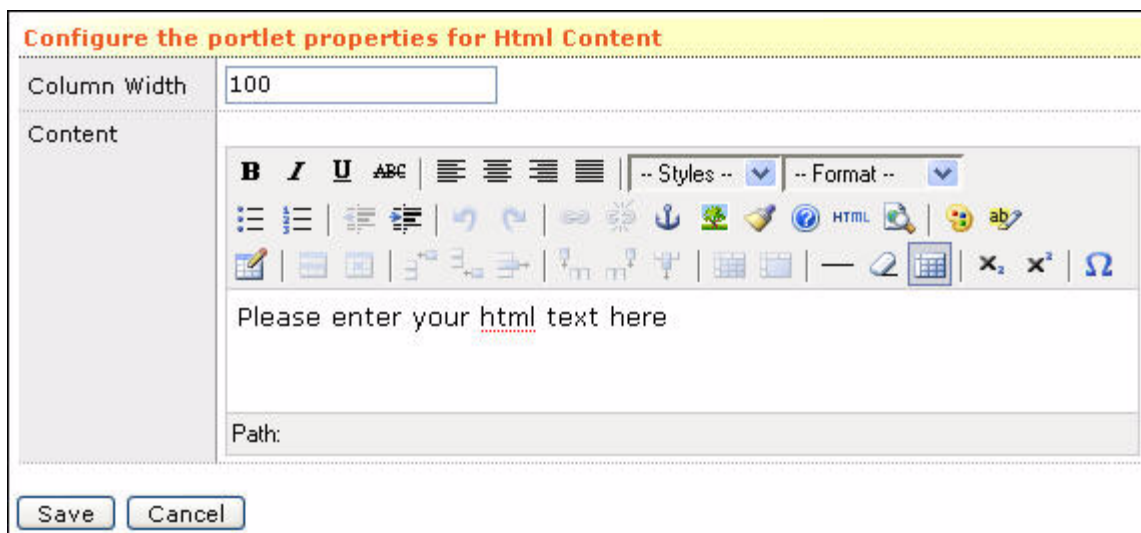


Figure 16.41 Editing Portlets

This page enables you to edit:

- Column Width
- Content

Click **Save** to commit the changes or **Cancel** to abort changes.

## 16.7.2.2 Replace Portlets

Click **Replace Portlet** to replace the portlet. You can select a portlet, as shown in [Figure 16.42](#).

Column Properties	
Width	<input type="text" value="100"/>
Choose a Portlet	
<u>Folder</u>	Allows a folder's records to be managed
<u>Html Content</u>	Create content for your website. Content includes text, images, tables, and more.
<u>Folder Graph</u>	Renders a graph from a folder's records
<u>Accounts with and without Opportunities</u>	Renders a Graph shows number of accounts stacked by with/ without opportunity (2 colors) (y), by industry (x)
<u>New Accounts by Week</u>	Renders a graph shows number of new accounts (y), by week (x), 12 weeks rolling
<u>Most Recent: New Accounts</u>	Renders Recent New Accounts
<u>Most Recent: Critical Issues in My Accounts</u>	Renders the most recent critical issues in my accounts data
<u>Most Recent: My Serviced Accounts</u>	Renders the most recently serviced accounts data
<u>Spreadsheet</u>	Spreadsheet data

**Figure 16.42** Choosing a New Portlet

The types of portlets available vary from one module to another. The common types of portlets are:

- Folder
- Folder Graph
- Spreadsheet

## 16.7.2.3 Folder

Selecting the **Folder** option displays the **Configure the portlet properties for Folder** page, as shown in [Figure 16.43](#).



Configure the portlet properties for Folder	
Column Width	<input type="text" value="100"/>
Select Folder	--None-- <input type="button" value="v"/>
Number of Records to Display in List	<input type="text" value="12"/>
Folder Access Options	<input type="checkbox"/> Determines if a user can view the folder's records View <input type="checkbox"/> Determines if a user can add records to a folder Add <input type="checkbox"/> Determines if a user can edit folder records Edit <input type="checkbox"/> Determines if a user can delete folder records Delete
Fields to display in list	<input type="text"/> <input type="button" value="Select"/> <input type="button" value="Clear"/>
Aggregate Functions on numeric fields	<input type="checkbox"/> Computes and displays the sum of all numeric fields in the list view Total <input type="checkbox"/> Computes and displays the average of all numeric fields in the list view Average
Double Precision	<input type="text" value="2"/> (Number of characters to calculate after the decimal point)
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 16.43 Configuring the Portlet Properties for Folder

The options that can be configured on this page are:

- **Column Width** - enables you to specify the width of the portlet screen. By default, the column width is set as 50.
- **Select Folder** - enables you to select a folder to be displayed. The folders that are created using **Custom Folders and Fields** in the **Global Folders and Accounts** modules are displayed in this list for selection.
- **Number of Records to Display in List** - enables you to specify the number of records that are to be displayed. By default, 12 records are displayed in a list.
- **Folder Access Options** - enables you to specify the folder access options.
- **Fields to display in list** - enables you to specify the fields to be displayed in the list.
- **Aggregate Functions on numeric fields** - enables you to specify the aggregate functions that need to be displayed on the screen. For example, Total and Average.
- **Double Precision** - enables you to specify the precision for decimals.

## 16.7.2.4 Folder Graph

Selecting the **Folder Graph** option displays the **Configure the portlet properties for Folder Graph** page, as shown in [Figure 16.44](#).

Configure the portlet properties for Folder Graph	
Column Width	<input type="text" value="100"/>
Select Folder	--None-- <input type="button" value="v"/>
Choose Major Axis	<input checked="" type="radio"/> X-Axis <input type="radio"/> Y-Axis
Graph Size	<input type="text" value="0"/> Width <input type="text" value="0"/> Height
Major Axis Field	None Selected <input type="button" value="[_ Select]"/> <input type="button" value="[_ Clear]"/>
Minor Axis Parameter	<input type="text" value=""/> <input type="button" value="[_ Select]"/> <input type="button" value="[_ Clear]"/>
Show Legend	<input type="checkbox"/>
Record Range	<input type="text" value="0"/> Number of Records from the most Recent Record
Graph Refresh Rate	<input type="text" value="0"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 16.44** Configuring the Portlet Properties for Folder Graph

A **Folder Graph** provides the capability to display graphical views of records in a Global Folder.

The options that can be configured are:

- **Column Width** - Enables you to specify the width of the portlet screen.
- **Select Folder** - Enables you to select a folder to be displayed. The folders that are created using **Custom Folders and Fields** in the **Global Folders** and **Accounts** modules are displayed in this list for selection. For more details, refer to [Section 16.7.1, "Creating Custom Folders and Fields"](#).
- **Choose Major axis (X or Y)** - Enables you to choose the major axis for the graph.
- **Minor Axis Parameter** - Enables you to specify the fields. Click **Select** to specify the parameters. Select the fields and click the **Add** button to add the parameters, as shown in [Figure 16.45](#). This page also enables you to specify the graph type.

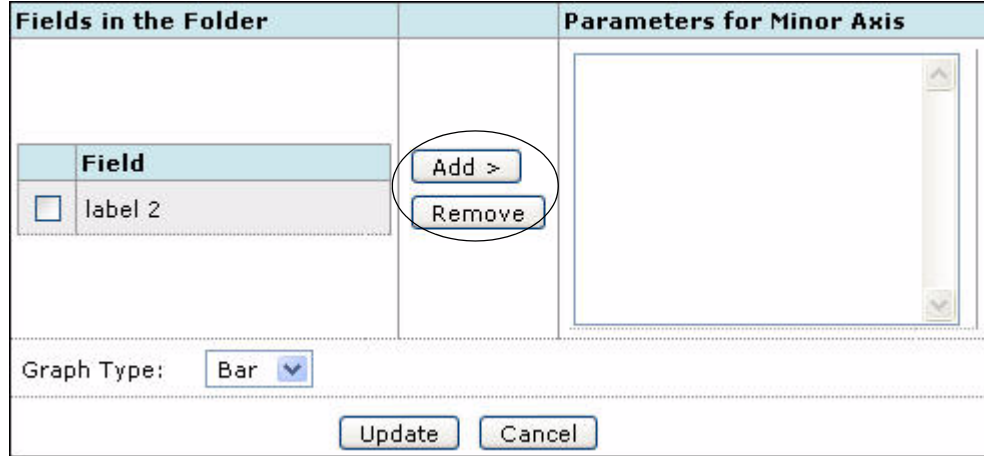


Figure 16.45 Specifying Parameters for Minor Axis

- **Show Legend** - Enables you to specify if you want to display a legend.
- **Record Range** - Enables you to specify the number of records of the graph.
- **Graph Refresh Rate** - Enables you to specify the graph refresh rate. The time period (in minutes) for which the graph is cached (0 for no caching).

However, the graph does not displays data if the global folder it refers to does not have any records.

### 16.7.2.5 Spreadsheet Portlet

Selecting the **Spreadsheet** option displays the **Configure the portlet properties for Spreadsheet** page, as shown in [Figure 16.46](#).

Configure the portlet properties for Spreadsheet	
Column Width	<input type="text" value="100"/>
Select Folder	--None-- <input type="button" value="v"/>
Range	<input type="text" value="0"/> (Number of Records from the Current Record)
Number of Cells in the Spread Sheet	<input type="text" value="0"/> Rows <input type="text" value="0"/> Columns (Max Limit for rows and columns is 20*20)
Spread Sheet Configuration	[ <a href="#">Configure</a> ]
Spread Sheet Preview	
Double Precision	<input type="text" value="2"/> (Number of characters to calculate after the decimal point)
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 16.46 Configuring the Portlet Properties for Spreadsheet

A Spreadsheet portlet provides the capability to display a spreadsheet of text and numbers. It enables you to pull records from **Global Folders** and perform spreadsheet like formula on it (for example, =a1, =SUM(a,a2), =SUM(a1:a10)).

The options that can be configured are:

- **Column Width** - enables you to specify the width of the portlet screen. By default, the column width is set as 100.
- **Select Folder** - enables you to select a folder to be displayed. The folders that are created using **Custom Folders and Fields** in the **Global Folders** and **Accounts** module are displayed in this list for selection.
- **Range** - enables you to specify the number of records of the graph.
- **Number of Cells in the Spread Sheet** - enables you to specify the number of rows and columns in the spreadsheet.
- **Spreadsheet Configuration** - enables you to enter text, numbers, cell references, and formula.
- **Double Precision** - enables you to specify the precision for decimals.

### 16.7.3 Using Action Plan Editor

Action plans in the **Accounts** module are created from generic templates. **Action Plan Editor** enables you to create these generic action plan templates that can be used in the **Accounts** module.

To create a sample action plan template, click **Configure Modules**, and select **Accounts**. Click **Action Plan Editor** and select **Edit** from the page, as shown in [Figure 16.47](#).

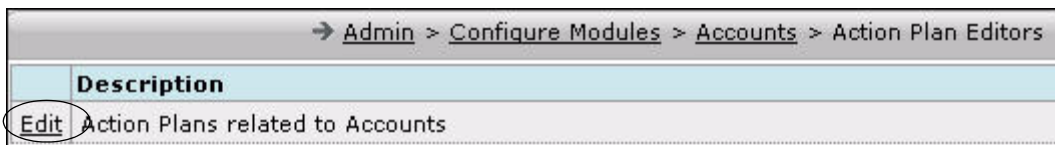


Figure 16.47 Edit Action Plans Related to Accounts

You can:

- **Add Action Plan**
- **Configure Categories**

Clicking **Configure Categories** displays a pop-up window enabling you to edit the action plan categories. For more details, refer to [Section 16.7.8, "Organizing Help Desk Categories"](#).

The action plan templates list provides an overview of the action plans and the number of instances that have been created for the template, as shown in [Figure 16.48](#). Click **Add Action Plan**.

→ [Admin](#) > [Configure Modules](#) > [Accounts](#) > [Action Plan Editors](#) > [Action Plans](#)

★ Create, Modify or Delete Action Plans

[Add Action Plan](#) | [Configure Categories](#)

0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Records 1 to 2 of 2 total [Previous|Next] ↻

	Name ▲	Phases	Steps	Approved	Active Date	Archived	Archived Date	Site	Records
▼	<a href="#">Account Ordering</a>	2	5	Yes	1/6/2008 EST	No		None	0
▼	<a href="#">Launch New Product</a>	1	2	Yes	1/7/2008 EST	No		None	0

[Previous|Next] Page 1 of 1, Items per page: 10 [Go]

**Figure 16.48 List of Action Plan Templates**

The **Add Action Plan** page is displayed, as shown in [Figure 16.49](#).

Enter a name and description of the action plan template. When creating an action plan, do not approve it before completely editing the phases and steps of the plan. Approved action plan templates are readily available in the **Accounts** module to create action plans.

Specify the category for the plan, if you have created action plan categories. Click **Save** to commit the changes.

→ [Admin](#) > [Configure Modules](#) > [Accounts](#) > [Action Plan Editors](#) > [Action Plans](#) > [Add Action Plan](#)

**Add Action Plan**

Name  \*

Description

Approved

Category

Sub-level 1

Sub-level 2

Sub-level 3

**Figure 16.49 Add Action Plan Template**

The details page of the **Action Plan Template** is displayed. An action plan template consists of one or more phases each with one or more steps. Each phase is executed in a sequence from top to bottom. To add a new phase, click **Add a Phase**. This displays a form to add the phase information, as shown in [Figure 16.50](#).

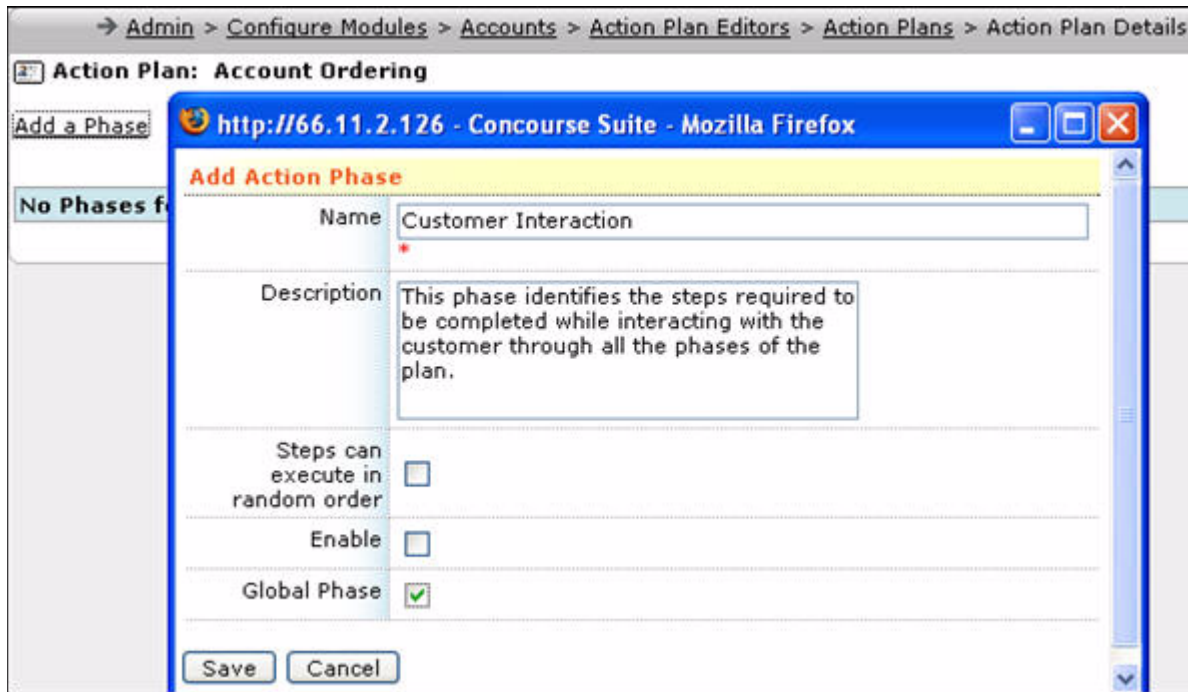


Figure 16.50 The Action Plan Templates Details Page

The fields to be entered in the form are:

- **Name** - the name of the phase to be displayed in the action plan.
- **Description** - a brief description of the phase.  
This information is not displayed in the action plan instances.
- **Steps can execute in random order** - indicates that the steps can be completed in random order.  
The sequence of steps in this phase does not matter. All steps of the phase have to be completed to proceed to the next phase.
- **Enable** - indicates that the phase is activated.
- **Global Phase** - indicates that the phase need not be executed in a sequence.  
There can only be one global phase per template.

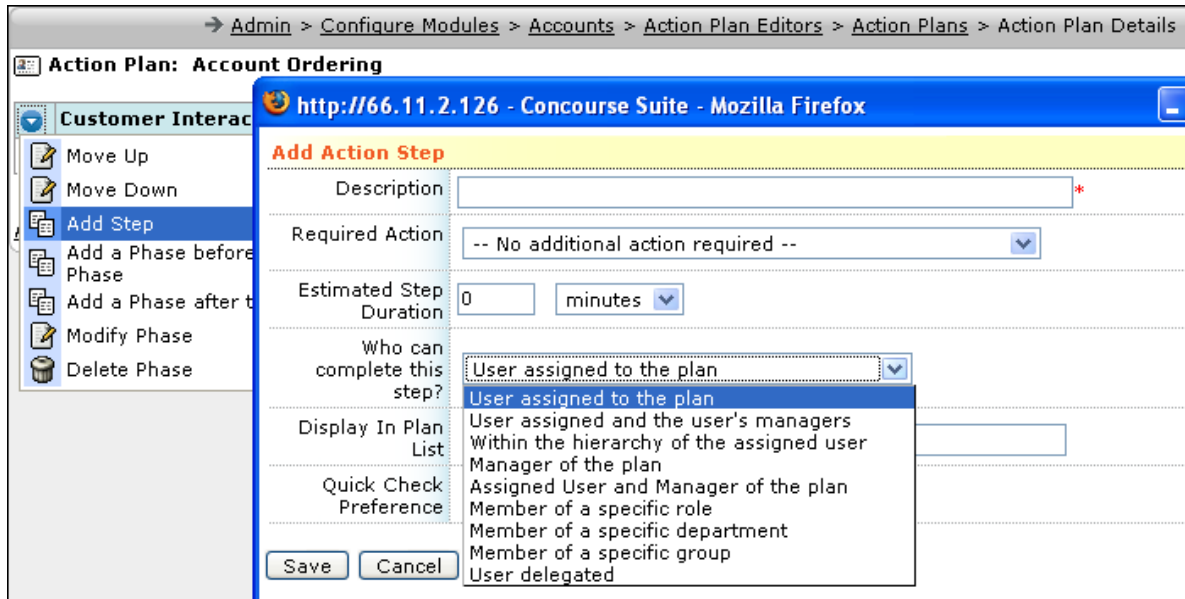
Click **Save** to add the phase to the action plan template. The phase is displayed on the **Action Plan Details** page.

The following options are available for the phase:

- **Move Up** - moves a phase up by one unit.  
It is valid for non-global phases.
- **Move Down** - moves a phase down by one unit.  
It is valid for non-global phases.
- **Add Step** - adds a step to the end of this phase.
- **Add a Phase Before this Phase** - adds a phase above this phase.
- **Add a Phase After This Phase** - adds a phase next in the sequence of phases.

- **Modify Phase** - modifies the phase in a popup window.
- **Delete Phase** - deletes the current phase and steps.  
If instances of the action plan template already exist, the phase cannot be deleted.

To add a step to this phase, click **Add Step**, as shown in [Figure 16.51](#).



**Figure 16.51 Add Step on the Action Plan Template Details Page**

The fields to be entered in this form are:

- **Description** - indicates the name of the step to be displayed in the plan.
- **Required Action** - indicates the action to be performed before completing a step. Several such options are included for action plan templates.
- **Estimated Step Duration** - indicates the period of time required to complete this step.

This time period is not enforced as a constraint.

- **Who can complete this step** - determines the owner of the step.

The options available are:

- User assigned to the plan
- User assigned and the user's managers
- Within the hierarchy of the assigned user
- Manager of the plan
- Assigned User and Manager of the plan
- Member of a specific role
- Member of a specific department
- Member of a specific group

This option enables you to select a specific group for the step at the time of creation, but the **User Group** option for **Ticket Action Plans** enables the ticket's user group to complete the step.

- User delegated

This option is similar to the user assigned to the plan.

- **Skip to Here** - enables the current step to be completed out of order.

You can complete this step and skip all other steps before it. This option must be used only for steps whose completion makes all previous steps, which were not completed, invalid. This option is not available for steps of the **Global Phase**.

Enter the information for the step and click **Save** to add the step at the end of the phase for the action plan template. A sample action plan is shown in [Figure 16.52](#).

→ Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans > Action Plan Details

**Action Plan: Account Ordering**

Customer Interaction (Global Phase)				
<input type="checkbox"/>	Customer Signature on Files	User assigned to the plan	Attachment Optional	15 minutes
<input type="checkbox"/>	Customer Financing Approved	User assigned to the plan	Attachment Optional	0 minutes
Client Interaction				
<input type="checkbox"/>	Initial Meeting With Client	User assigned to the plan	Attachment Optional	0 minutes
<input type="checkbox"/>	Needs Analysis	User assigned to the plan	Attachment Optional	0 minutes
<input type="checkbox"/>	Create Opportunity	User assigned to the plan	Attachment Optional	0 minutes







**Figure 16.52 A Sample Action Plan Templates Detail Page**

Consider a sample action plan **Sales Tracking**, as shown in [Figure 16.53](#).



→ Admin > Configure Modules > Accounts > Action Plan Editors > Action Plans > Action Plan Details

**Action Plan: Account Ordering**

Customer Interaction (Global Phase)				
Customer Signature on Files		User assigned to the plan	Attachment Optional	15 minutes
Customer Financing Approved		User assigned to the plan	Attachment Optional	0 minutes
<div style="border: 1px solid gray; padding: 5px;"> <ul style="list-style-type: none"> <li> Move Up</li> <li> Move Down</li> <li> Add a Step before this Step</li> <li> Add a Step after this Step</li> <li> Modify Step</li> <li> Delete Step</li> </ul> </div>				
		User assigned to the plan	Attachment Optional	0 minutes
		User assigned to the plan	Attachment Optional	0 minutes
Create Opportunity		User assigned to the plan	Attachment Optional	0 minutes

**Figure 16.53 Viewing a Sample Action Plan**

The following options are available for the steps in this action plan:

- **Move Up** - moves the step up by one unit.
- **Move Down** - moves the step down by one unit.
- **Add a Step before this Step** - enables users to add a step before the current step in sequence.
- **Add a Step after this Step** - enables users to add a step next in sequence with the current step.
- **Modify Step** - enables users to modify the current step. Selecting the option **Quick Check Reference** on the **Modify Action Step** page, as shown in [Figure 16.54](#), checks if all the steps preceding this step are completed.

Modify Action Step	
Description	Customer Financing Approved *
Required Action	-- No additional action required --
Estimated Step Duration	0 minutes
Who can complete this step?	User assigned to the plan
Display In Plan List	<input type="checkbox"/> <input type="text"/>
Quick Check Preference	<input type="checkbox"/> Checks all preceding steps
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 16.54 Modifying Action Steps

- **Delete Step** - enables users to delete the current step.  
If instances of the action plan already exist in the **Accounts** module, the step cannot be deleted.

On completing the phases and steps of the action plan template, it can be set as **Approved** from the list page. You can access the action plan template from the **Accounts** module to create action plans.

## 16.7.4 Modifying Lookup Lists

You can modify most of the options in the ConcourseSuite modules by clicking the **Lookup Lists** link. This displays the lookup lists that can be configured for that module, with options to preview and edit the lists. The options available for the **Accounts** module are shown in [Figure 16.55](#).

→ Admin > Configure Modules > Accounts > Lookup Lists			
	List Name	Items	Preview
<a href="#">Edit</a>	Account Types	10	Small
<a href="#">Edit</a>	Contact Types	13	Accounting
<a href="#">Edit</a>	Email Types	2	Primary
<a href="#">Edit</a>	Address Types	4	Primary
<a href="#">Edit</a>	Phone Types	2	Main
<a href="#">Edit</a>	Industry Types	21	Automotive
<a href="#">Edit</a>	Segment	0	
<a href="#">Edit</a>	Sub Segment	0	
<a href="#">Edit</a>	Site	0	
<a href="#">Edit</a>	Account Size	4	1-10
<a href="#">Edit</a>	Account Stage	4	New

Figure 16.55 Account Lookup Lists

The **Edit List** screen displays a blank field on the left with an **Add** tab, as shown in [Figure 16.56](#). It also displays a list of current values with tabs to perform the following tasks:

- Move the values up or down
- Sort the values
- Remove values
- Rename the values

→ Admin > Configure Modules > Accounts > Lookup Lists > Edit List		
Account Types		
New Option	Up	Small
<input type="text"/>	Down	Medium
<a href="#">Add &gt;</a>	Remove	Large
	Sort	Contract
	Rename	Non-contract
		Territory 1: Northeast
		Territory 2: Southeast
		Territory 3: Midwest
<a href="#">Save Changes</a>	<a href="#">Cancel</a>	

Figure 16.56 Editing a Lookup List

To perform any task, select an entry and click one of the tabs. To add a new entry, enter its name in the **New Option** field, and click **Add**.

Consider another example, the **Accounts** module. The options available for the **Accounts** module are shown in [Figure 16.57](#).

Admin > Configure Modules > Accounts > Lookup Lists			
	List Name	Items	Preview
<a href="#">Edit</a>	Account Types	12	Small
<a href="#">Edit</a>	Contact Types	13	Accounting
<a href="#">Edit</a>	Email Types	2	Primary
<a href="#">Edit</a>	Address Types	4	Primary
<a href="#">Edit</a>	Phone Types	2	Main
<a href="#">Edit</a>	Industry Types	21	Automotive
<a href="#">Edit</a>	Segment	0	
<a href="#">Edit</a>	Sub Segment	0	
<a href="#">Edit</a>	Site	0	
<a href="#">Edit</a>	Account Size	4	1-10
<a href="#">Edit</a>	Account Stage	4	New

**Figure 16.57 Viewing the Options - Accounts Module**

To configure the options for **Contact Stage**, click **Edit** beside **Contact Stage**, as shown in [Figure 16.57](#).

Admin > Configure Modules > Accounts > Lookup Lists > Edit List

**Account Types**

New Option:

[Add >](#)

[Up](#) [Down](#) [Remove](#) [Sort](#) [Rename](#)

- Small
- Medium
- Large
- Contract
- Non-contract
- Territory 1: Northeast
- Territory 2: Southeast
- Territory 3: Midwest

[Save Changes](#) [Cancel](#)

**Figure 16.58 Accessing the Edit List**

The **Edit List** is displayed, as shown in [Figure 16.58](#). You can add new options by specifying the option in the **New Option** field and click **Add**. To rename the existing options, click **Rename**. Click **Remove** to remove an option. You can sort the options using the **Sort** button or rearrange their position on the screen using the **Up** and **Down** buttons.

Click **Save** to commit the changes or click **Cancel** to abort the changes.

You must pay attention to the initial configuration of the lookup lists to get the lists right. The lookup lists are used in **Reports** and **Communications** to aid you in classifying your data.

## 16.7.5 Adding Custom Tabs

In some modules, apart from the default tabs, you can add additional tabs to group additional information. These modules are:

- Accounts
- Communications
- Contacts
- Leads
- Pipeline
- Products
- Quotes

Custom tabs enable you to view additional details about accounts, campaigns, contacts, leads, and so on. For example, on the **Account Details** page, you can see the following tabs:

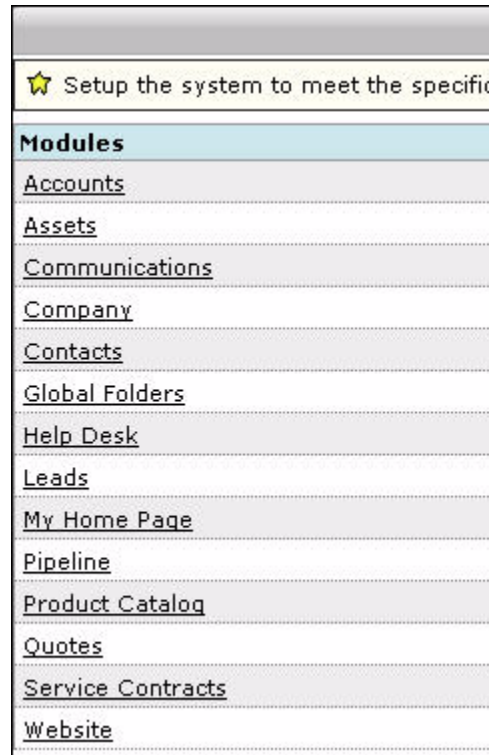
- Details
- History
- Folders
- Contacts
- Action Plans
- Activities
- Opportunities
- Quotes
- Projects
- Service Contracts
- Assets
- Tickets
- Relationships
- Document
- Document Stores

Consider a scenario wherein you want to add a tab called **Client Visit Details** to keep a track of the client visits to your organization. For this purpose, you can create the custom tab, **Client Visit Details**, in the **Admin** module.

To add a custom tab:

1. On the **Admin** page, click **Configure Modules**.

The **Configure Modules** page with all the modules listed is displayed, as shown in [Figure 16.59](#).



The screenshot shows a web interface with a header bar and a main content area. The header bar contains a star icon and the text "Setup the system to meet the specific". Below the header, there is a section titled "Modules" with a light blue background. Underneath, a list of modules is displayed, each on a separate line with a dotted line below it: Accounts, Assets, Communications, Company, Contacts, Global Folders, Help Desk, Leads, My Home Page, Pipeline, Product Catalog, Quotes, Service Contracts, and Website.

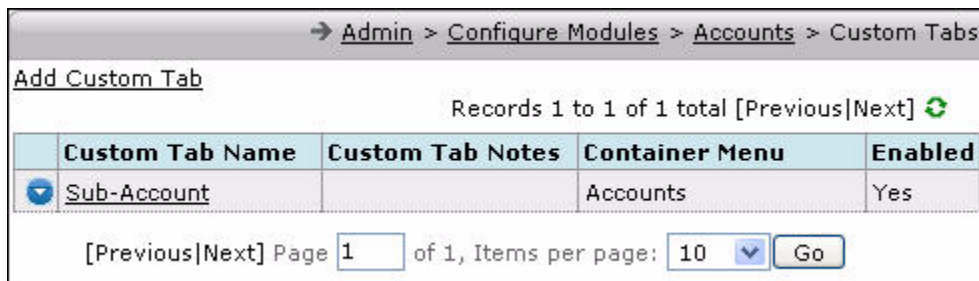
**Figure 16.59 Configure Modules**

2. Click **Accounts**.

The **Accounts** page is displayed.

3. Click **Custom Tabs**.

The **Custom Tabs** page is displayed, as shown in [Figure 16.60](#).



The screenshot shows a web interface with a breadcrumb trail: "Admin > Configure Modules > Accounts > Custom Tabs". Below the breadcrumb, there is a section titled "Add Custom Tab" and a table. The table has a header row with columns: "Custom Tab Name", "Custom Tab Notes", "Container Menu", and "Enabled". There is one data row with the following values: "Sub-Account", an empty cell, "Accounts", and "Yes". Below the table, there is a pagination control: "[Previous|Next] Page 1 of 1, Items per page: 10 [Go]".

**Figure 16.60 The Custom Tabs Page**

4. Click **Add Custom Tab**.

The **Add Custom Tab** page is displayed, as shown in [Figure 16.61](#).

→ Admin > Configure Modules > Accounts > Custom Tabs > Add Custom Tab

**Add Custom Tab**

Name	Client Visit Details *
Enabled	<input checked="" type="checkbox"/> (indicates if the Custom Tab is visible)
Container Menu	Accounts
Notes	This folder stores the details of the client visit in the organization.

Save Cancel

**Figure 16.61 The Add Custom Tab Page**

5. Enter the name of the tab and select the **Enabled** option.  
You can specify the container menu of the tab in the **Container Menu** field.
6. Click **Save**.  
The **Custom Tabs** page is displayed, as shown in [Figure 16.62](#).

→ Admin > Configure Modules > Accounts > Custom Tabs

Add Custom Tab


Records 1 to 2 of 2 total [Previous|Next] ↻

Custom Tab Name	Custom Tab Notes	Container Menu	Enabled
Sub-Account		Accounts	No
Client Visit Details	This folder stores the details of the client visit in the organization.	Accounts	Yes

Previous|Next] Page 1 of 1, Items per page: 10 Go

- ↑ ↓
- ✎ Modify Details
- 📄 Grant Permissions
- ⚙️ Configure
- 🗑️ Delete

**Figure 16.62 Viewing the Custom Tab**

- Clicking  enables you:
- **Upward and Downward Arrows** - to relocate the position of the custom tab.
  - **Modify Details** - to modify the custom tab details.
  - **Grant Permissions** - to grant permissions of the custom tab to the user roles defined in the **Admin** module.
  - **Configure** - to configure the custom tab.
  - **Delete** - to delete the custom tab.

## 16.7.5.1 Configuring Custom Tabs


To display desired information on the custom tab you must configure it. To configure the **Client Visit Details** tab in the **Accounts** module, you must add a table to add the following details:

- Name of the client visiting you
- Location of the client
- Date of visit
- Number of days of stay
- Any notes related to the visit

To configure the **Client Visit Details** tab, you must first:

- Create a global folder called **Client Visits**.  
For more details, refer to [Section 16.7.1, “Creating Custom Folders and Fields”](#).
- Add the following fields to the folder:
  - Name
  - Location
  - Date of Visit
  - Number of Days of Stay
  - Notes

To configure a custom tab:

1. Click  beside the tab name shown in [Figure 16.62](#).

A blank page showing the **Row** and **Column** options to configure the tab is displayed, as shown in [Figure 16.63](#).

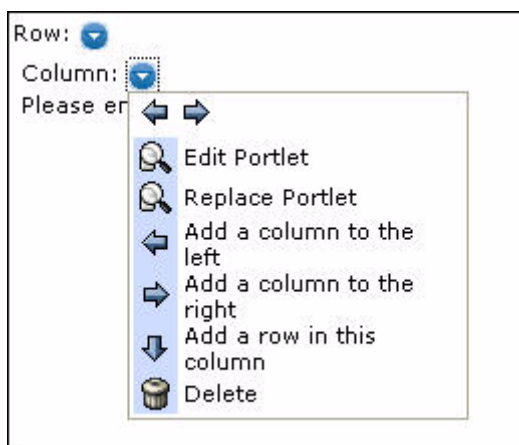


Figure 16.63 Configuring Custom Tab

2. Select **Replace Portlet**.



Column Properties	
Width	<input type="text" value="100"/>
Choose a Portlet	
<u>Folder</u>	Allows a folder's records to be managed
<b>Html Content</b>	Create content for your website. Content includes text, images, tables, and more.
<u>Folder Graph</u>	Renders a graph from a folder's records
<u>Spreadsheet</u>	Spreadsheet data
<input type="button" value="Cancel"/>	

Figure 16.64 Selecting Portlet for the Custom Tab

The following portlet options are displayed, as shown in [Figure 16.64](#):

- **Folder** - to add and display data in the selected folder created using the **Global Folder** option.
- **HTML Content** - to display text and images.
- **Folder Graph** - to display a graph using the folders created using the **Global Folder** option.

---

**Note:** To create a graph using the **Folder Graph** option, you must add a **Date** field in the folder created using the **Global Folder** option. Only the **Date** field can be used as the **Major Axis Field** for the graph.

---

- **Spreadsheet** - to display spreadsheet data in the tab.  
In addition to these portlets, the following portlet options are available in the **Leads** module:
  - **Leads by Status**
  - **New Leads by Week**
  - **Most Recent: My Last Assigned Leads**
  - **Most Recent: My Last Working Leads**
  - **Most Recent: Recent Unprocessed Leads**
3. Click **Folder**.

The **Configure the Portlet Properties for Folder** page is displayed, as shown in [Figure 16.65](#).

Configure the portlet properties for Folder	
Column Width	100
Select Folder	--None--
Number of Records to Display in List	--None--
Folder Access Options	<input type="checkbox"/> user can view the folder's records View <input type="checkbox"/> Determines if a user can add records to a folder Add <input type="checkbox"/> Determines if a user can edit folder records Edit <input type="checkbox"/> Determines if a user can delete folder records Delete
Fields to display in list	[ Select ] [ Clear ]
Aggregate Functions on numeric fields	<input type="checkbox"/> Computes and displays the sum of all numeric fields in the list view Total <input type="checkbox"/> Computes and displays the average of all numeric fields in the list view Average
Double Precision	2 (Number of characters to calculate after the decimal point)
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 16.65 Configuring the Portlet Properties for Folder

4. Select the **Client Visits** folder from the **Select Folder** field.
5. Grant required permissions for the folder in the **Folder Access Options** field.
6. Click **Select** to add fields to be displayed on the custom tab.

The fields available in the selected folder are displayed, as shown in [Figure 16.66](#).

Fields in the Folder	Fields to Display in List
Name Location of the Client Date of Visit Number of Days of Stay Notes	
<input type="button" value=""/> >>	<input type="button" value="Up"/>
<input type="button" value=""/> <<	<input type="button" value="Down"/>
<input type="button" value="Update"/>	<input type="button" value="Cancel"/>

Figure 16.66 Selecting Fields from the Folder

7. Click the field name and click  to select the field.

The folder fields are selected and displayed on the **Configure the Portlet Properties for Folder** page, as shown in [Figure 16.67](#).

Configure the portlet properties for Folder	
Column Width	<input type="text" value="100"/>
Select Folder	<input type="text" value="Client Visits"/> ▼
Number of Records to Display in List	<input type="text" value="12"/>
Folder Access Options	<input checked="" type="checkbox"/> Determines if a user can view the folder's records View <input checked="" type="checkbox"/> Determines if a user can add records to a folder Add <input checked="" type="checkbox"/> Determines if a user can edit folder records Edit <input checked="" type="checkbox"/> Determines if a user can delete folder records Delete
Fields to display in list	<input type="text" value="Name"/> [ Select ] [ Clear ] <input type="text" value="Location of the Client"/> <input type="text" value="Date of Visit"/> <input type="text" value="Number of Days of Stay"/> <input type="text" value="Notes"/>
Aggregate Functions on numeric fields	<input type="checkbox"/> Computes and displays the sum of all numeric fields in the list view Total <input type="checkbox"/> Computes and displays the average of all numeric fields in the list view Average
Double Precision	<input type="text" value="2"/> (Number of characters to calculate after the decimal point)
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Figure 16.67 Viewing the Selected Fields**

- Click **Save**.

The custom tab is configured and you can add records to the folder by clicking **Add Folder Record** shown in [Figure 16.68](#).

Row: ▼										
Column: ▼										
<a href="#">Add Folder Record</a>										
No records to display [Previous Next]										
<table border="1"> <thead> <tr> <th>Name</th> <th>Location of the Client</th> <th>Date of Visit</th> <th>Number of Days of Stay</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td colspan="5">No records in this folder.</td> </tr> </tbody> </table>	Name	Location of the Client	Date of Visit	Number of Days of Stay	Notes	No records in this folder.				
Name	Location of the Client	Date of Visit	Number of Days of Stay	Notes						
No records in this folder.										

**Figure 16.68 Viewing the Custom Tab After Configuring**

- To view the custom tab in the **Accounts** module, click the **Accounts** tab.

The **Client Visit Details** tab is shown at the bottom of the default tabs, as shown in [Figure 16.69](#).



**Figure 16.69 Viewing the Custom Tab in the Accounts Module**

10. Click **Client Visit Details** to view and add records.

The **Client Visit Details** page is displayed, as shown in [Figure 16.70](#).

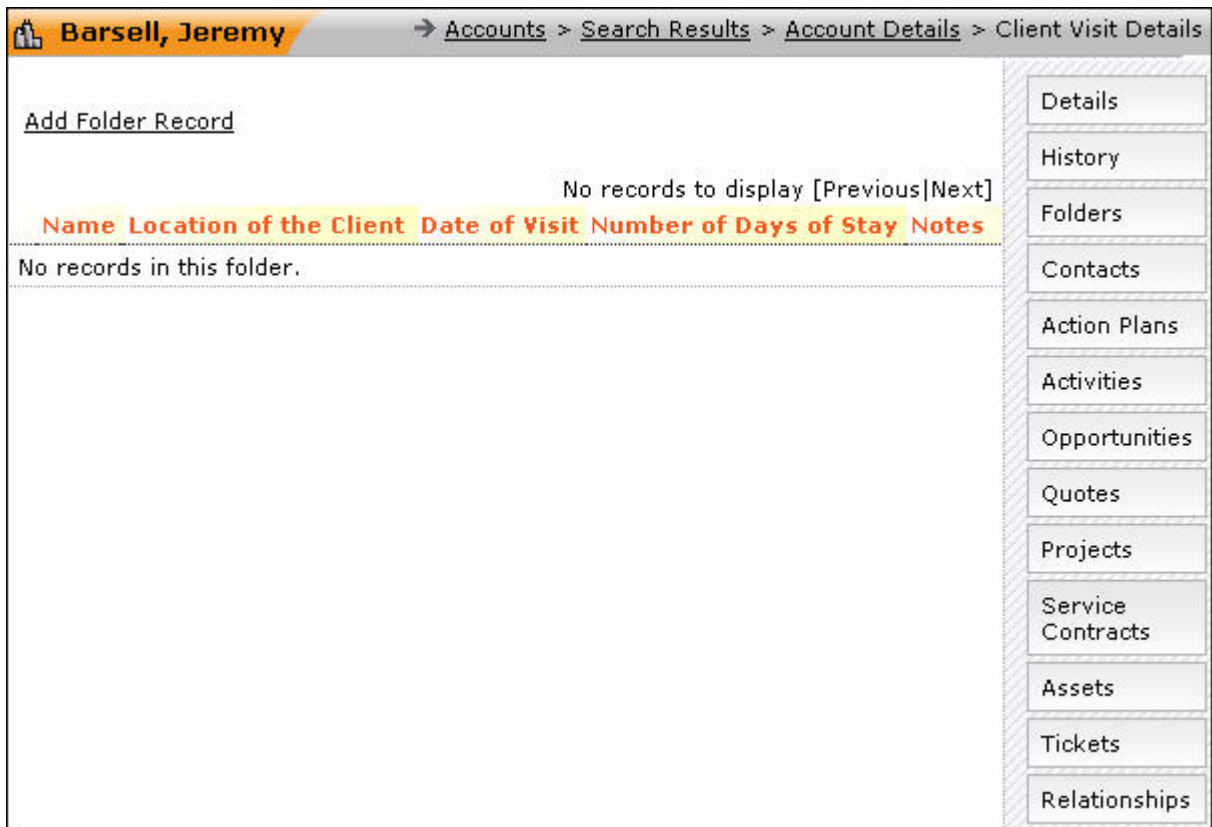


Figure 16.70 The Client Visit Details Page

11. Click **Add Folder Record** to add records.

The selected folder fields are displayed, as shown in [Figure 16.71](#).

**Barsell, Jeremy** → Accounts > Search Results > Account Details > Client Visit Details

Folder: **Client Visits** This folder can have multiple records

**Group: Visit Details**

Name	<input type="text" value="Kuell Smith"/> *
Location of the Client	<input type="text" value="California"/> ▼ *
Date of Visit	<input type="text" value="12/3/2007"/> *
Number of Days of Stay	<input type="text" value="5"/> *
Notes	<input type="text" value="She met the VP Finance and discussed the possibilities of enhancing business with our organization."/>

- Details
- History
- Folders
- Contacts
- Action Plans
- Activities
- Opportunities
- Quotes
- Projects
- Service Contracts
- Assets
- Tickets
- Relationships
- Documents

**Figure 16.71 Adding Records in the Folder**

12. Enter values in the fields and click **Save**.

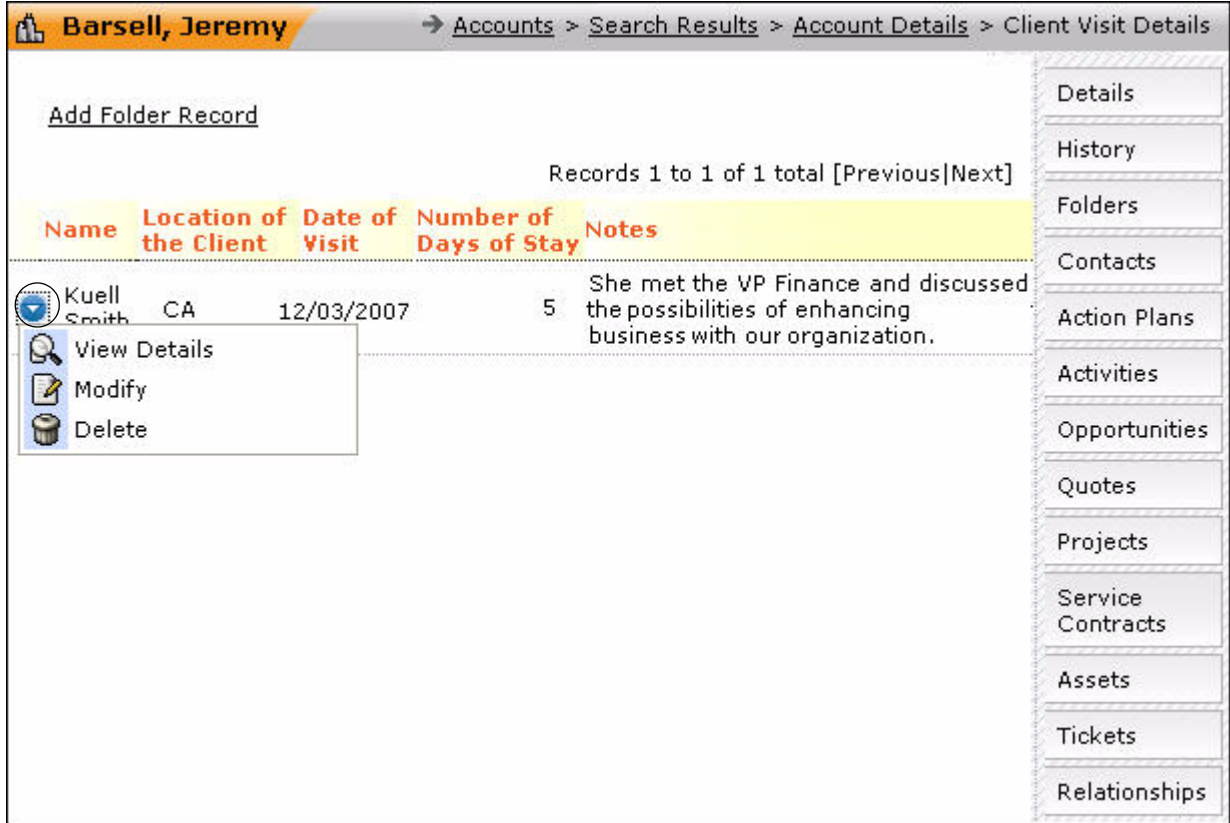



Figure 16.72 Viewing the Added Record

Clicking  beside the record, displays the following options:

- View Details
- Modify
- Delete

## 16.7.6 Accessing Sites/Territories

The site feature enables secure management of accounts and users into several sites/territories. The users of each site can access information of that specific site only. They are restricted from accessing information from other sites. The main **None** site users can manage all other site information, such as accounts, contacts, and users.

The site lookup list is blank by default. With no entries in the site lookup list, all accounts and users belong to the **None** site. You can create new sites by editing the lookup list. Accounts or users can be added to any one of the sites in the list, or the **None** site. The users of site 'A' can never be the manager of the users of another site 'B', or the **None** site. The **None** site users can be managers of users belonging to several sites.

---

**Caution:** The application enforces a strict security policy regarding sites.

---

## 16.7.7 Organizing Asset Categories

The **Contracts** and **Assets** tabs in the **Accounts** module help you in providing contracted maintenance, support, or recurring payments on goods or services under contract. For more details, refer to [Chapter 7, "Managing Accounts"](#).

Assets refer to hardware and software, and contracts refer to the legal agreements about assets that you have with vendors or customers. The assets are generally physical items, such as computers, telephones, or automobiles. The assets can also be service oriented, such as software. An asset can be covered by a contract, but it is not mandatory.

The main **Assets** page in **Admin** is shown in [Figure 16.73](#).



**Figure 16.73 Configuration Options for Assets**

The **Admin** module has the following configurable options for **Assets**:

- **Lookup Lists** - enables you to modify asset.
- **Categories** - enables you to classify the asset.

To manage asset categories, click the **Categories** link, and select **Edit** beside **Asset Categories**, as shown in [Figure 16.74](#).



**Figure 16.74 Asset Categories**

The **Active Categories** page is displayed, as shown in [Figure 16.75](#). This page is an interactive editor that helps you define and modify levels of **Asset Categories**. Depending on your installation, the levels may be ready for you to enter definitions.

All categories are unique to their site/territory. You can view the categories of a site by selecting the site from the drop-down list of sites on top of the page. The following tabs at the top of the editor window are displayed:

- **Active Categories**
- **Draft Categories**



In **Active Categories**, you can view the settings that are currently defined for the specific site. Selecting the **Draft Categories** displays an editor that resembles the **Active Categories**, except for the **Edit** tabs in each level column. **Draft Categories** can be edited for different sites.

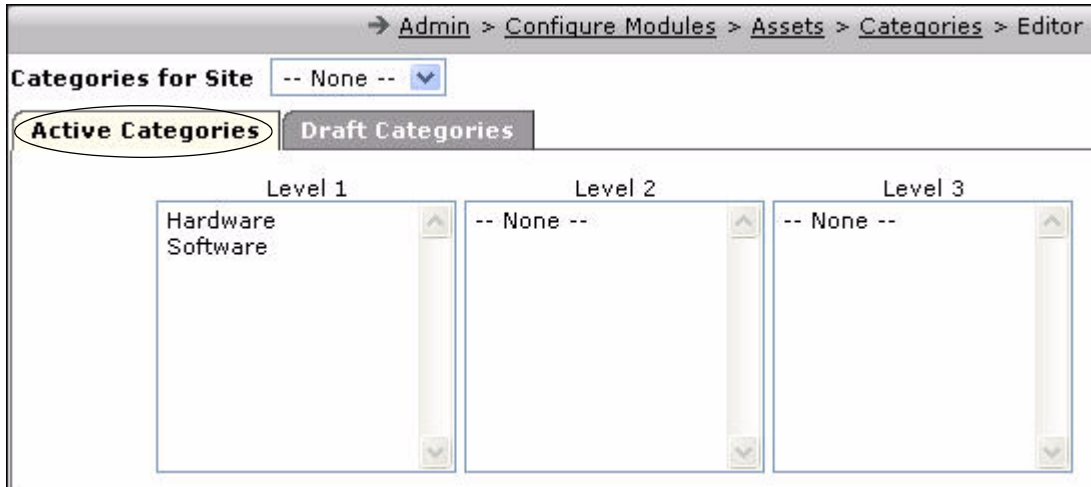


Figure 16.75 Asset Category Editor - Active Categories

This tab enables you to edit the selections in each column, as shown in [Figure 16.76](#).

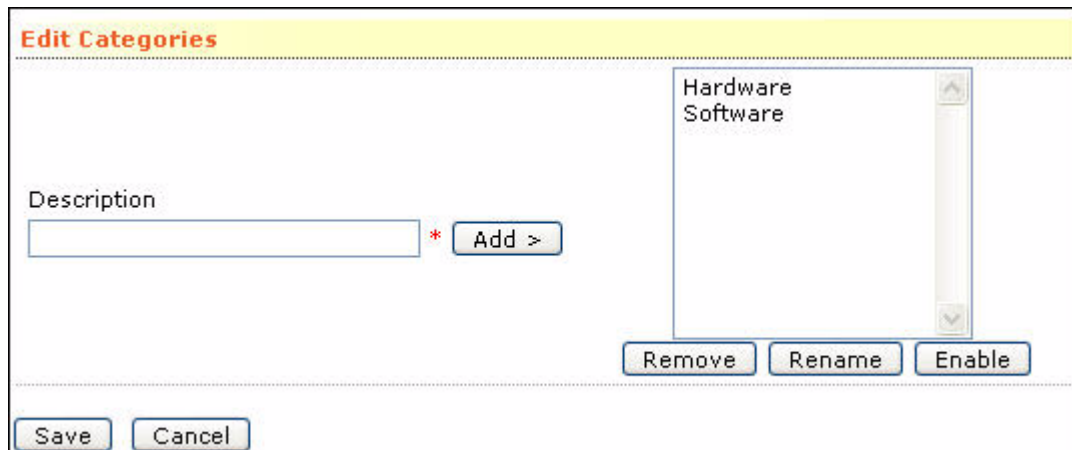


Figure 16.76 Asset Category Editor - Draft Categories

After editing the levels and values, click **Save** in the **Editor** page. Click **Activate** in the **Draft Categories** page to confirm the modifications. This displays the **Active Categories** page with all the modifications applied. You can classify assets using the categories you defined. Organizing your assets helps you to query the **Help Desk** or **Account Asset** sections with detailed reports later on.

Custom folders and fields, lookup lists, and categories are common to many of the configurable modules.

## 16.7.8 Organizing Help Desk Categories

The **Help Desk** module enables you to classify customer or internal issues. For more details, refer to [Chapter 10, "Understanding Communications"](#). Click **Configure Modules** on the **Admin** page, and select **Help Desk**. The **Help Desk** main page is displayed, as shown in [Figure 16.77](#).

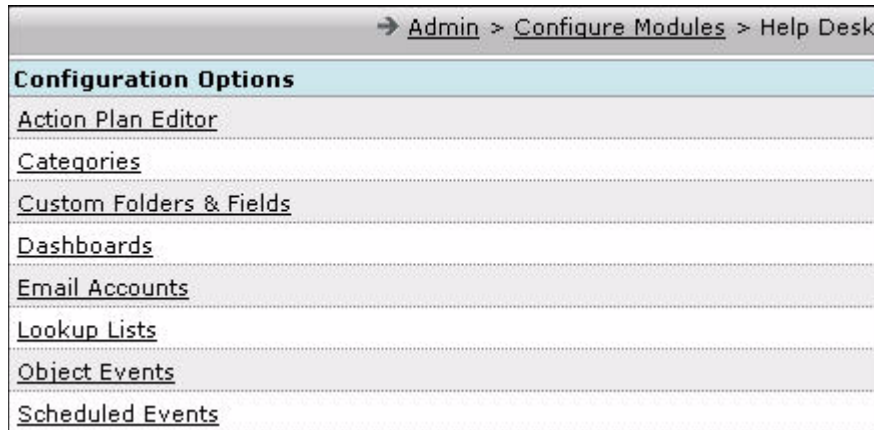


Figure 16.77 The Help Desk Main Page

Click **Categories** and select **Edit Ticket Categories**. You can edit the categories as you did in **Assets**.

The issue description, categorization, and solution information are stored in a database. You can use this database to operate the **Knowledge Base** in the **Help Desk** module. If the problem is categorized and the solution is well-documented, you can use a category page to search for the solution to a problem.

**Ticket Categorization** can also be used for ticket assignment and action plan selection in the ticket **Add** and **Modify** pages. Click **Assignment** for ticket assignment. You must enter the following fields, as shown in [Figure 16.78](#):

- **Department** - indicates the department of the assigned user of the ticket.
- **Resource Assigned** - indicates the user belonging to the previously selected department who is assigned the ticket.
- **Assigned Group** - indicates the user group to which the ticket is assigned.
- **Action Plans** - enables you select an action plan from the set of action plans.

**Mapped Action Plans for Category: Technical**

Name	Approved	Active Date	Archived	Archived Date
No mapped action plans found.				

Switch to Site:

No records to display [Previous|Next]

Name ▲	Approved	Active Date	Archived	Archived Date
No action plans found.				

[Previous|Next] Page  of 1, Items per page:

Figure 16.78 Help Desk Categories and Ticket Assignment

## 16.7.9 Configuring the Object Events and Scheduled Events

The **Admin** page provides the following configuration options for a help desk:

- **Object Events** - This page enables you to insert and update ticket objects. You can select this option by clicking **Object Events**, as shown in [Figure 16.77](#).
- **Scheduled Events** - This page enables you to access ticket notifications. You can select this option by clicking **Scheduled Events**.

→ Admin > Configure Modules > Help Desk > Object Events

Object Event	Triggered Process	Number of components	Available
<input checked="" type="checkbox"/> Insert ticket object	<a href="#">dhv.ticket.insert</a>	6	Yes
<input checked="" type="checkbox"/> Update ticket object	<a href="#">dhv.ticket.insert</a>	6	Yes
<input checked="" type="checkbox"/> Update actionitemwork object	<a href="#">dhv.actionitemwork.update</a>	7	Yes

View Details

Figure 16.79 Object Events

→ Admin > Configure Modules > Help Desk > Scheduled Events

Process to Execute	Schedule	Number of components	Available
Edit <a href="#">Overdue ticket notification</a>	Every 10 minutes; 8 AM - 6 PM	2	Yes

Figure 16.80 Scheduled Events

**Object Events** and **Scheduled Events** are a set of workflow rules activated by actions in the system. Click **Object Events** to view the details page, as shown in

**Figure 16.79.** In **Object Events**, the workflow is activated when a ticket is entered or closed.

The **Process Details** page, which enables you to insert a ticket object is shown in **Figure 16.81**.

→ <a href="#">Admin</a> > <a href="#">Configure Modules</a> > <a href="#">Help Desk</a> > <a href="#">Object Events</a> > Process Details		
<b>Process: Ticket change notification</b>		
<b>Step 1: Was the ticket just closed?</b>		
<b>Results</b>		<b>Go to</b>
Yes		↓ Step 2
Yes (disabled)		↓ Step 3
No		↓ Step 4
<b>Step 2: Sends notifications to specified users with the specified parameters</b>		
Parameters (7) [ <a href="#">Show</a> ]		
<b>Results</b>		<b>Go to</b>
Process Finished		↓ Stop
<b>Step 3: org.aspcfs.modules.troubletickets.components.SendTicketSurvey (disabled)</b>		
<b>Results</b>		<b>Go to</b>
Process Finished		↓ Stop
<b>Step 4: Was the ticket just assigned or reassigned?</b>		
<b>Results</b>		<b>Go to</b>
Yes		↓ Step 5
No		↓ Stop
<b>Step 5: Sends notifications to specified users with the specified parameters</b>		
Parameters (6) [ <a href="#">Show</a> ]		
<b>Results</b>		<b>Go to</b>
Yes		↓ Step 6
No		↓ Stop
<b>Step 6: Sends notifications to specified users with the specified parameters</b>		
Parameters (7) [ <a href="#">Show</a> ]		
<b>Results</b>		<b>Go to</b>
Process Finished		↓ Stop

**Figure 16.81** Insert Ticket Object

---

**Note:** In both the options, you can hide or show the parameters. The pages displayed when parameters are shown or hidden, are shown in [Figure 16.82](#) and [Figure 16.83](#).

---

→ [Admin](#) > [Configure Modules](#) > [Help Desk](#) > [Object Events](#) > Process Details

**Process: Ticket change notification**

**Step 1: Was the ticket just closed?**

Results	Go to
Yes	↓ Step 2
Yes (disabled)	↓ Step 3
No	↓ Step 4

**Step 2: Sends notifications to specified users with the specified parameters**

Parameters (7) [\[Hide\]](#)

Name	Value
notification.module	Tickets
notification.itemId	\${this.id}
notification.itemModified	\${this.modified}
notification.userToNotify	\${previous.enteredBy}
notification.userGroupToNotify	\${previous.userGroupId}
notification.subject	Concourse Suite Ticket Closed: \${this.paddedTicketId}
notification.body	<strong>The following ticket in Concourse Suite has been closed:</strong>   --- Ticket Details ---    <strong>Ticket #</strong> \${this.paddedTicketId}  Priority: \${ticketPriorityLookup.description}  Severity: \${ticketSeverityLookup.description}  Issue: \${this.problem}    Comment: \${this.comment}    Closed by: \${ticketModifiedByContact.nameFirstLast}    Solution: \${this.solution} 

Results	Go to
Process Finished	⬇ Stop

**Step 3: (disabled) org.aspcfs.modules.troubletickets.components.SendTicketSurvey**

Results	Go to
Process Finished	⬇ Stop

**Step 4: Was the ticket just assigned or reassigned?**

Results	Go to
Yes	↓ Step 5

Figure 16.82 Ticket Change Notification: Parameters Shown

→ [Admin](#) > [Configure Modules](#) > [Help Desk](#) > [Object Events](#) > Process Details

**Process: Ticket change notification**

Step 1:	Was the ticket just closed?
<b>Results</b>	<b>Go to</b>
Yes	↓ Step 2
Yes (disabled)	↓ Step 3
No	↓ Step 4
Step 2:	Sends notifications to specified users with the specified parameters
<b>Parameters (7) [Show]</b>	
<b>Results</b>	<b>Go to</b>
Process Finished	↓ Stop
Step 3:	org.aspcfs.modules.troubletickets.components.SendTicketSurvey
(disabled)	
<b>Results</b>	<b>Go to</b>
Process Finished	↓ Stop
Step 4:	Was the ticket just assigned or reassigned?
<b>Results</b>	<b>Go to</b>
Yes	↓ Step 5
No	↓ Stop
Step 5:	Sends notifications to specified users with the specified parameters
<b>Parameters (6) [Show]</b>	
<b>Results</b>	<b>Go to</b>
Yes	↓ Step 6
No	↓ Stop
Step 6:	Sends notifications to specified users with the specified parameters
<b>Parameters (7) [Show]</b>	
<b>Results</b>	<b>Go to</b>
Process Finished	↓ Stop

Figure 16.83 Ticket Change Notification: Parameters Hidden

Click **Scheduled Events** to view the details page, as shown in [Figure 16.80](#). In **Scheduled Events**, workflows are activated by timing, for example, every hour or every day. The **Scheduled Events** page with global parameters displayed, as shown in [Figure 16.84](#).

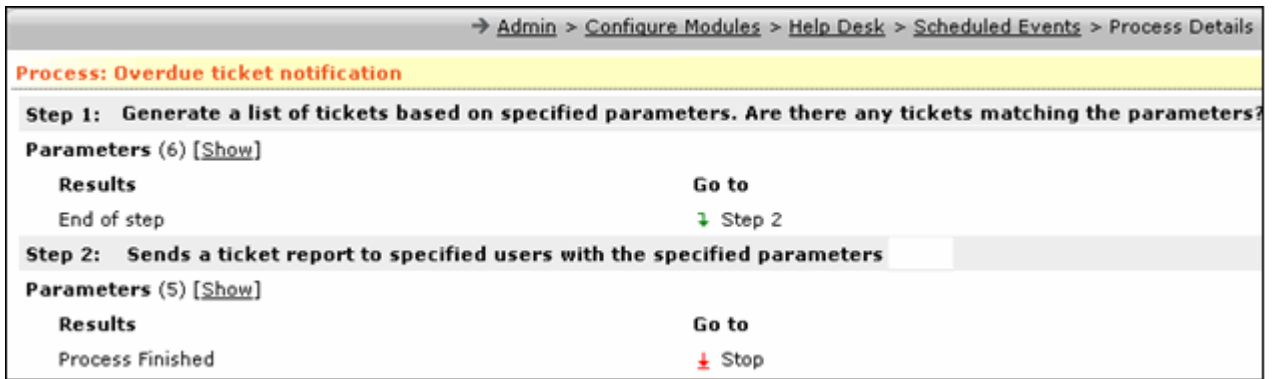


Figure 16.84 Scheduled Event: Global Parameters Shown

### 16.7.10 Configuring the Product Catalog

The **Admin** section provides a web-based interface to configure and manage your company's **Product Catalog**.

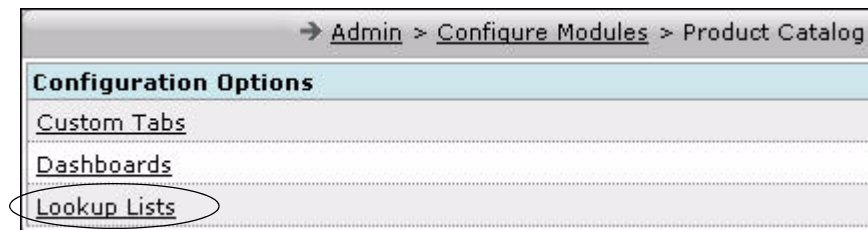


Figure 16.85 The Product Catalog Main Page

The feature available in **Product Catalog** is **Lookup Lists** to configure lookup-lists.

## 16.8 Configuring the System

To configure your system, click **Configure System** on the main **Admin** module page. The **Configure System** page is displayed, as shown in [Figure 16.86](#).

→ <a href="#">Admin</a> > Configure System		
	Parameter	Current Value
<a href="#">Edit</a>	Company Information	Concursive Corp
<a href="#">Edit</a>	Business Process Management	5 Object Events / 5 Business Processes
<a href="#">Edit</a>	HTTP-XML API Client Manager	Total # of enabled clients 0
<a href="#">Edit</a>	Email Server	127.0.0.1
<a href="#">Edit</a>	Email Address	centric5e@centriccrm.com
<a href="#">Edit</a>	Concourse Suite URL	66.11.2.126/centric5e
<a href="#">Edit</a>	Fax Server	
<a href="#">Edit</a>	Asterisk Server	
<a href="#">Edit</a>	XMPP Server	Disabled
<a href="#">Edit</a>	LDAP Server	ldap://127.0.0.1:389 Disabled
<a href="#">Edit</a>	Default Time Zone for new users	GMT-5 Eastern US
<a href="#">Edit</a>	Default currency for system	United States Dollar (USD)
<a href="#">Edit</a>	Default language/locale for system	English - US
<a href="#">Edit</a>	Default country for system	UNITED STATES

**Figure 16.86 The Configure System Page**

There are a number of settings which are usually set at installation, and rarely need to be modified. These settings include:

- **Company Information** - enables the administrator to configure your company information.
- **Business Process Management** - enables the administrator to configure workflows based on your company's business processes.
- **Session Timeout** - displays the time, defining the period of inactivity that forces a user to be automatically logged out of the system.
- **Email Server** - enables you to configure a mail server such that your ConcourseSuite server is able to access mails. During setup, you can enable the **Use Secure Sockets layer (SSL)** preference and specify a port, username, and password, as shown in [Figure 16.87](#).



★ **Which email server should Concourse Suite use?**  
 Concourse Suite sends various notifications to users by email. Concourse Contacts and Accounts modules.

- ◆ The specified server must allow this server to relay email

**Modify Email Server**

Email Server: \*  
 (ex: mail.yourcompany.com or 127.0.0.1)

Use Secure Sockets Layer (SSL)

Port:

Username:

Password:

Figure 16.87 Setting Up Mail Server Settings

- **Email Address** - enables you to set this address in the **From** field of the message. You can assign a person to receive the mails sent to this address.
- **ConcourseSuite URL** - defines the Uniform Resource Locator (URL) that can be included in emails to enable you to access the site.
  - This is used when a survey is sent to a contact.
  - The URL must be specific and must exist in your Domain Name Server (DNS).
  - If a domain name is not configured, you can specify the Internet Protocol (IP) address and include the full path to access the ConcourseSuite web application.
- **Fax Server** - enables you to configure the fax server you want ConcourseSuite to use.  
 HylaFax is currently the only fax server supported. Leave the field blank if this facility is not used.
- **Default Time-Zone for New Users** - enables you to configure a lookup list defining all time zones.
- **Default Currency for the System** - enables you to configure a lookup list with all the currency types your system recognizes.
- **Default Locale for the System** - enables you to configure a lookup list defining the locales supported by your system.
- **Default Country for the System** - enables you to configure a lookup list defining the countries your system supports.

## 16.8.1 Modifying Company Information

To modify company information, click **Edit** beside **Company Information**. The **Modify Company Information** page is displayed, as shown in **Figure 16.88**. This page enables you to change the following details:

- Organization name
- Web Site URL
- Phone numbers
- Address
- Email addresses

Click **Update** to save the modified information.

→ Admin > Configure System > Company Information

**Modify Company Information**

Organization Name  \*

Web Site URL

**Phone Numbers**

Phone 1   ext.

**Addresses**

Type

Address Line 1

Address Line 2

Address Line 3

City

State/Province

Postal Code

Country

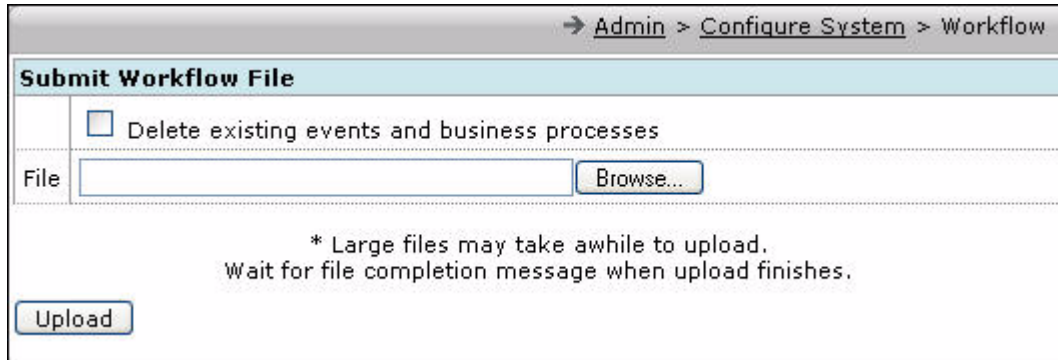
**Email Addresses**

Email 1

Figure 16.88 Modify Company Information

## 16.8.2 Modifying Business Process Management

To modify business process management information, click **Edit** beside the **Business Process Management** link. The **Submit Workflow File** page is displayed, as shown in [Figure 16.89](#). You can upload an XML workflow file that updates the workflow schema. Whenever you perform certain actions within ConcourseSuite, which has a series of automated actions associated with it, the workflow engine performs these actions sequentially.



→ [Admin](#) > [Configure System](#) > [Workflow](#)

### Submit Workflow File

Delete existing events and business processes

File

\* Large files may take awhile to upload.  
Wait for file completion message when upload finishes.

Figure 16.89 Business Process Management Using Workflows

## 16.9 Checking System Usage

To check the system usage, click **Check System Resources**. The **Usage** page is displayed, as shown in [Figure 16.90](#). This page displays information about the system, including the version of ConcourseSuite you are using.

→ [Admin](#) > Usage

Current Usage and Billing Usage Information

**Current system resources:**

7 enabled users

31 files stored in the document library using 5,554,361 bytes of storage

Available Memory:334912264  
Total Memory:799145984

Date Range:  ▼

**Usage for 11/23/2007 - 11/24/2007**

3 logins

0 files uploaded, using 0 bytes of bandwidth

0 files downloaded, using 0 bytes of bandwidth

0 emails sent, consisting of 0 bytes

0 faxes sent, consisting of 0 bytes

Application Version: Concourse Suite 5.0 Enterprise Beta 2 (2007-10-24)  
Database Version: (li/centric5e/src/f-20071026-branch50-2fixes/f-20071026-branch50fixes/src/sql/init/workflow)

**Figure 16.90 System Usage Display**

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