VersaDev

Corporate Internet and Intranet

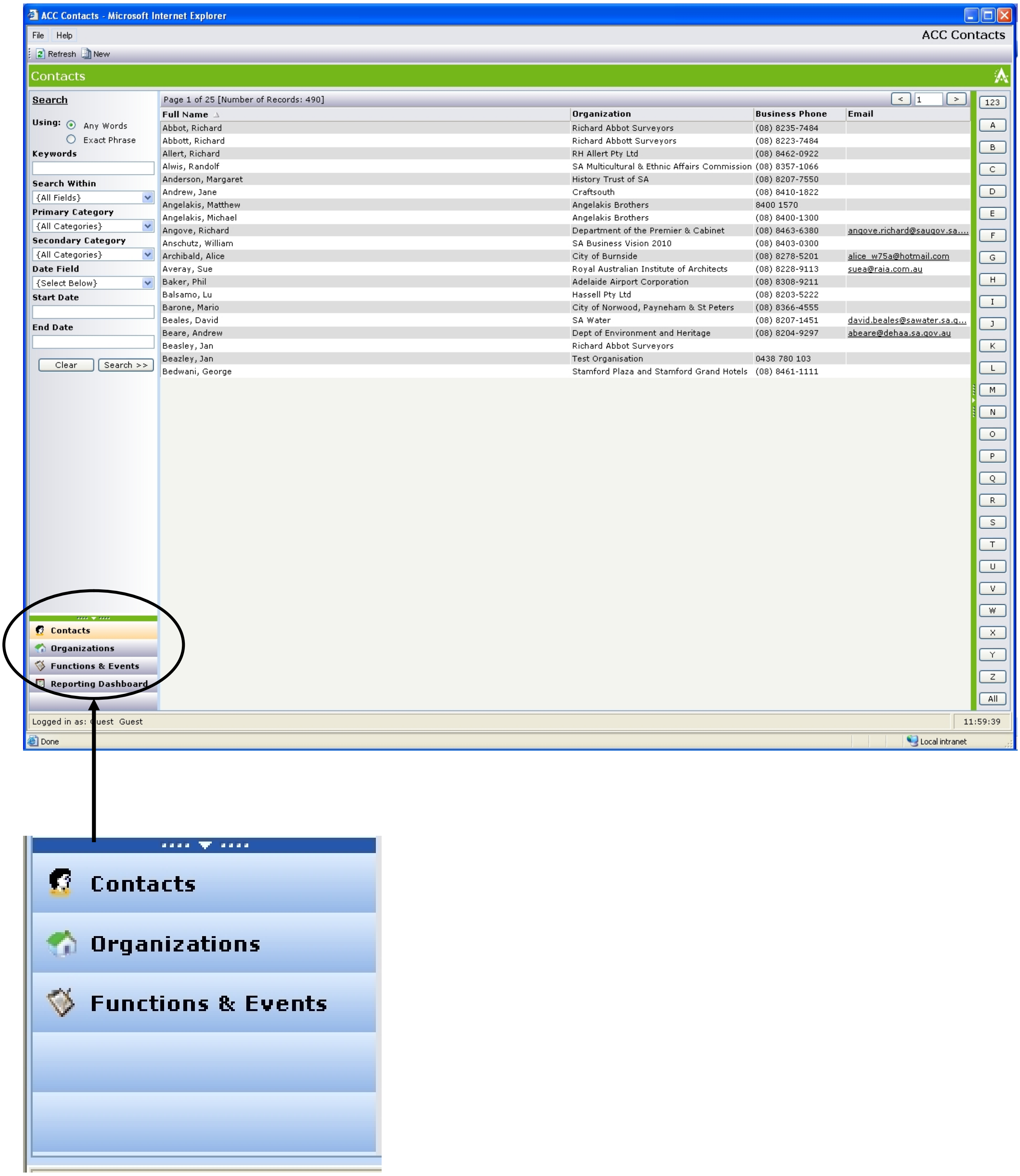
Welcome To *versa*CRM

***versa*CRM is a flexible and powerful Web Browser delivered CRM solution for managing corporate Contacts, Organizations, Functions and Events related data. *versa*CRM includes the ability to track all correspondence, including invitations to functions and events, as well as other forms of communication relating to your Contacts.**

***versa*CRM's intelligent cross referenced design model means that relational Contact & Organization data is not isolated and disparate, allowing for full entity relationship matching and giving you the power to profile your data more effectively.**

*versa*CRM Main Screen

The *versa*CRM main screen is the central area for viewing and accessing Contact, Organization, Function and Event records.



To access each Module simply click on the appropriate button as indicated in the bottom left section of the screen.

The very left pane in the main screen allows you to filter the return of records to the list display, based on the following options;

By KEYWORDS (using either "Any Words" or "Exact Phrase")

By FIELDS (Specific to Module)

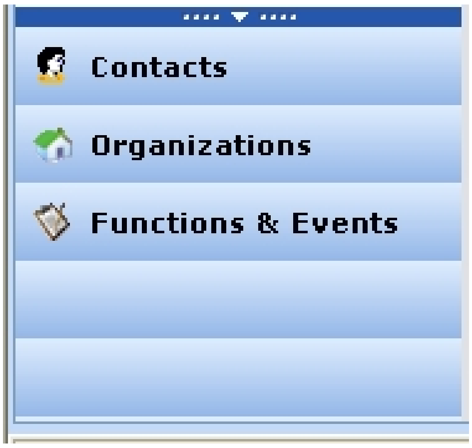
By PRIMARY CATEGORY

By SECONDARY CATEGORY

By START DATE/END DATE or Both

Opening an Existing Record

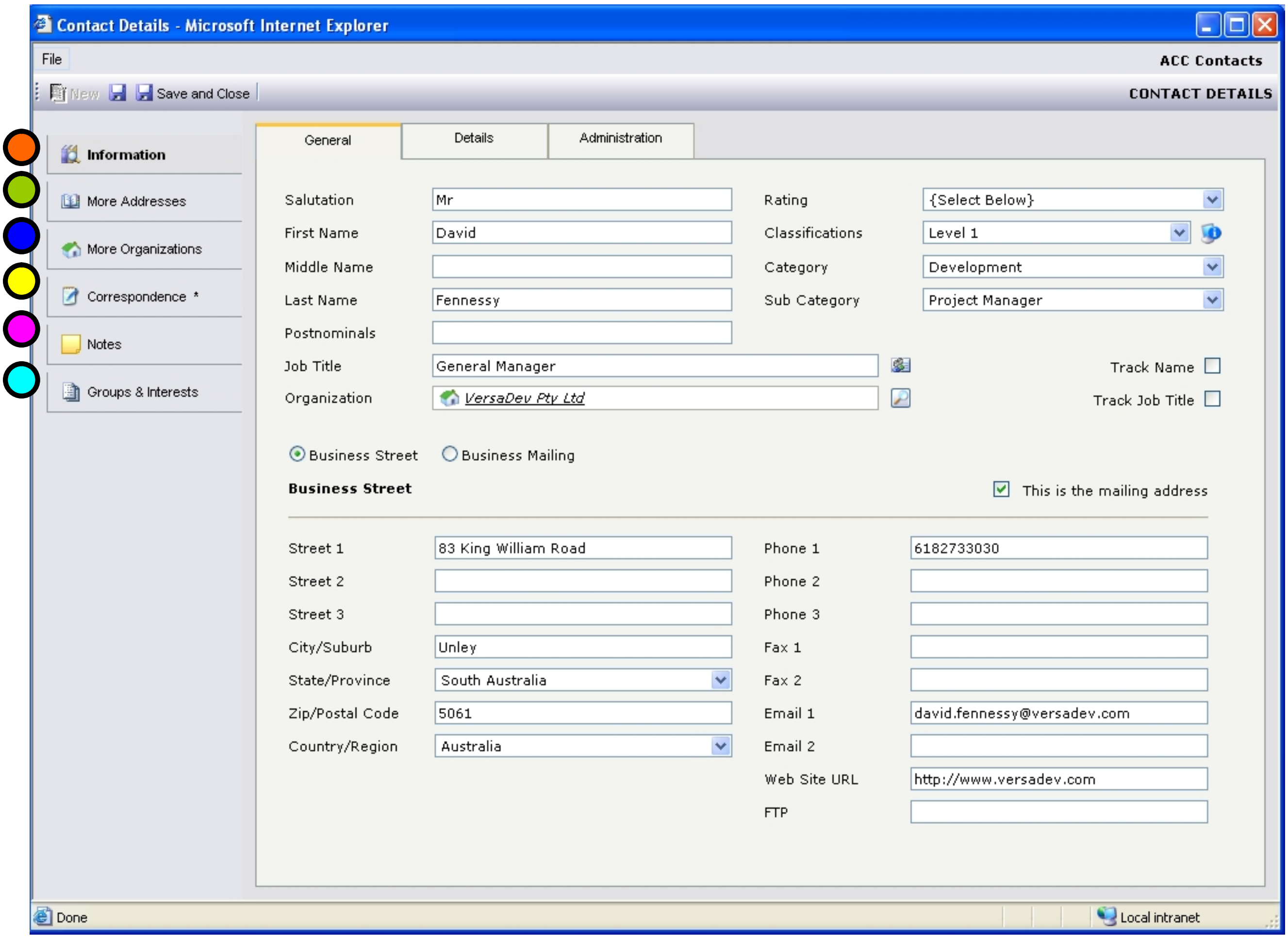
- **Select which record types you wish to select by clicking on the Contacts, Organizations or Functions & Events button at the bottom left of the screen.**



- **To open a record from the presented list returned in the panel, double-click on a record in the list. This will open the record as a separate panel displaying all the relevant details.***

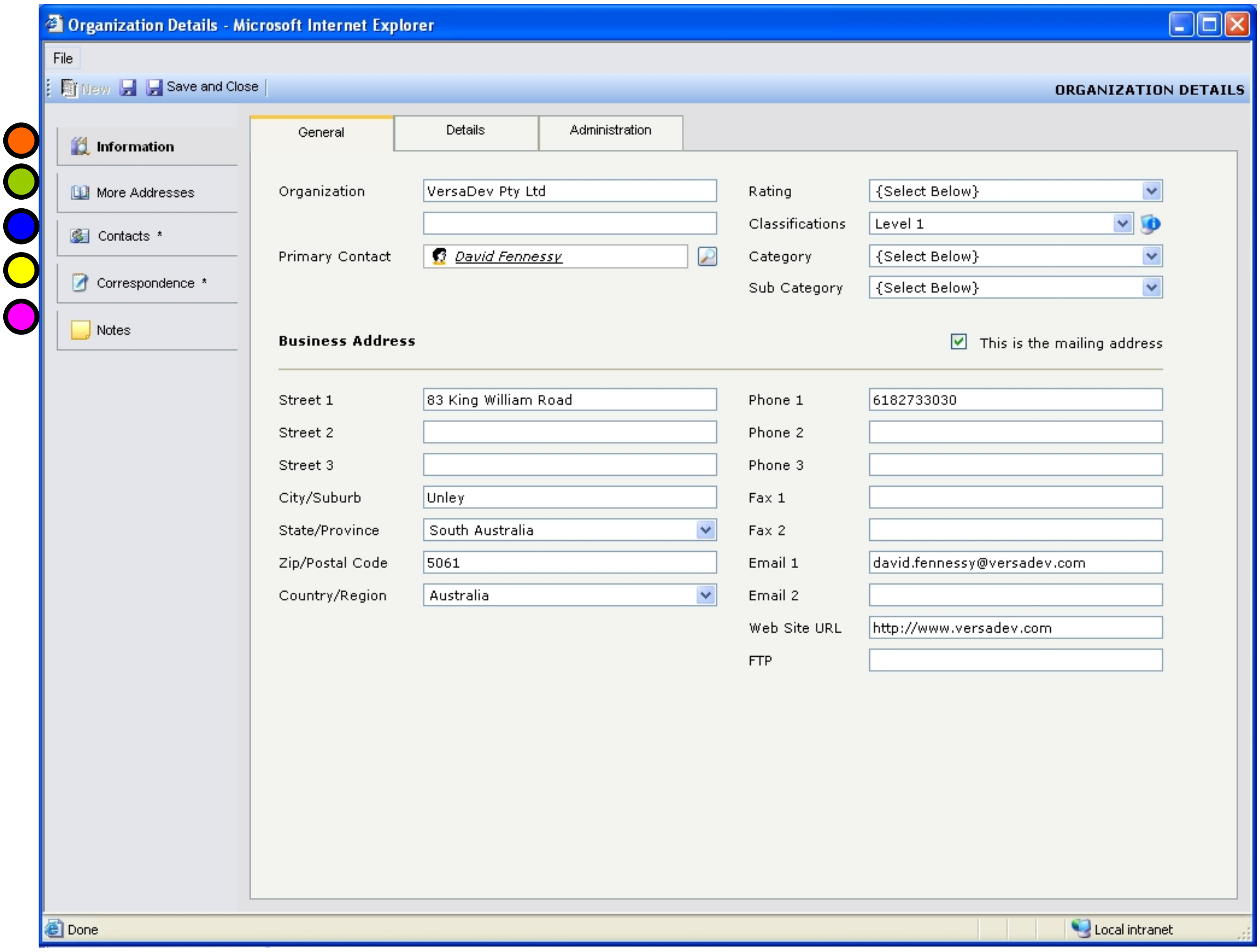
If a record is marked 'PRIVATE', and you do not have rights under your user account to view private records, you will not be able to open the record.

Contact Details Screen



Information Tab:	**All Primary details relating to a Contact.**
More Addresses Tab:	**All associated addresses against the Contact which are in addition to their Primary Address details.**
More Organizations Tab:	**All associated organizations against the Contact which are in addition to their Primary Organization details.**
Correspondence Tab:	**All associated correspondence that has occurred between your company and the Contact – including invitations.**
Notes Tab:	**All general note items recorded against a Contact.**
Groups & Interests Tab:	**Provides an area for recording what particular Groups a Contact has associations with as well as their relevant Interests.**

Organization Details Screen



Information Tab: All Primary details relating to an Organization.

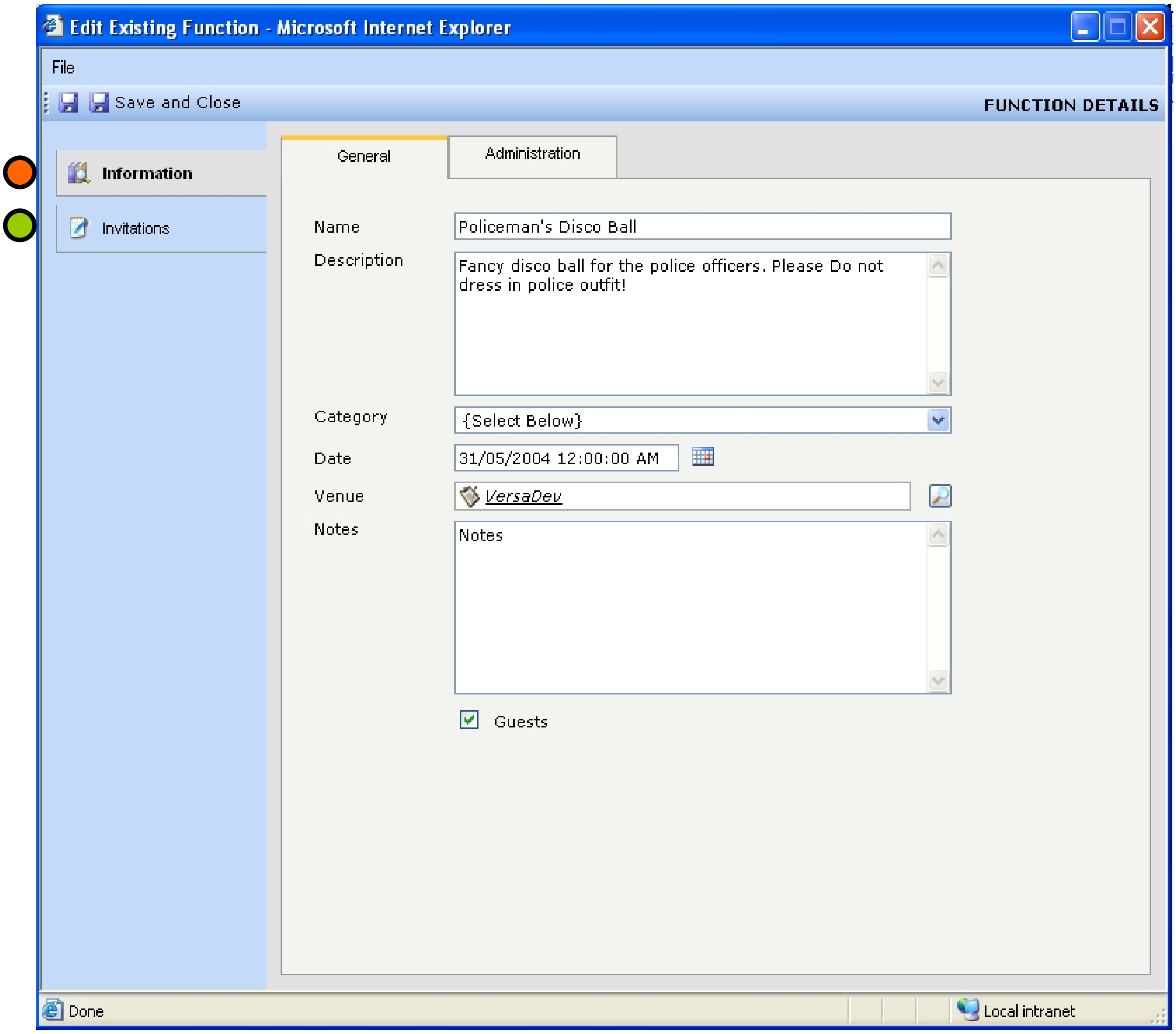
More Addresses Tab: All associated addresses against the Organization which are in addition to their Primary Business Address details.

Contacts Tab: All system registered Contacts whom have an association with the Organization.

Correspondence Tab: All associated correspondence that has occurred between your company and the Organization – including invitations.

Notes Tab: All general note items recorded against an Organization.

Functions & Events Details Screen



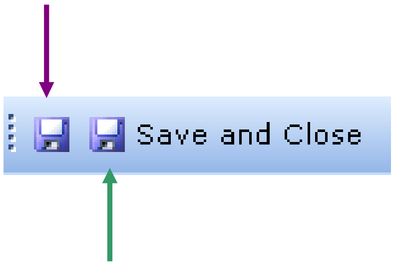
🟠	**Information Tab:**	**All Primary details relating to a Function.**
🟢	**Invitations Tab:**	**All system registered Contacts who have a recorded invitation against the Function.**

Editing Fields in the Contact / Organization / Functions & Events Details Panels

Many of the fields in the Contacts, Organizations, and Functions & Events Details Panels can be edited and changed, depending on your security profile and user right privileges.

After changing or adding data to any fields against the record you need to save those changes by clicking either one of the icons and the top left of the panel.

The first 'Disk Icon' will save any changes made to the record and leave the panel open - allowing you to make further changes. This can be applied as many times as you like.



The second 'Disk Icon' (Save and Close) will save any changes made to the record and then close the panel, returning you to the main *versa*CRM screen.

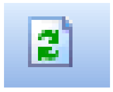
Please be aware that any changes made to a record *__will not be saved__* if you close the browser window in any other manner other than through the application - you must use the appropriate icon as shown above to commit and save the change before exiting *versa*CRM.

QUICK TIP! **_versa_CRM is smart enough that it will detect if a record has changed if you try to close the panel before saving it – the system will prompt you to save the changes before exiting.**

Adding New Main Records – Contacts, Organizations, Functions

- **From the *versa*CRM main screen, click on either the Contacts, Organizations or Functions & Events button on the bottom left of the panel to gain access to that particular Module.**

- **Clicking the NEW button near the top left of the screen will open a blank Details screen ready for data entry. Once completed and saved the record will now appear in the main record list. If the entry does not appear immediately, click the refresh icon at the top left of the main application screen.**

NEW RECORD ICON  **REFRESH ICON**

QUICK TIP! **You will notice that on first entering a new data entry panel that the only TAB available is "Information". After you have entered the required Primary data for the record, click on the first Save Icon at the top left of the panel as discussed earlier. Once the primary record details have been saved, all other Tabs will become available for use.**

Sub-Modules

- **Each Record can contain other information relevant to the Main Details, such as; More Addresses; More Organizations; Correspondence; Notes; Groups & Interests. Simply click on the appropriate TAB to view associated record information.**
    - **A TAB with an Asterix (*) next to it indicates that that particular tab has a list of records associated with it. The Asterix acts as a visual marker that there is data in that area.**

- **At the top left of each sub-module against an already created Main Record, an applicable NEW icon can be found to add a new entry for inclusion in the list.**

- **Clicking the appropriate button as shown below will open a blank Details screen ready for data entry.**

Entering a New Record of Correspondence

<u>For an Existing Contact or Organization Record</u>

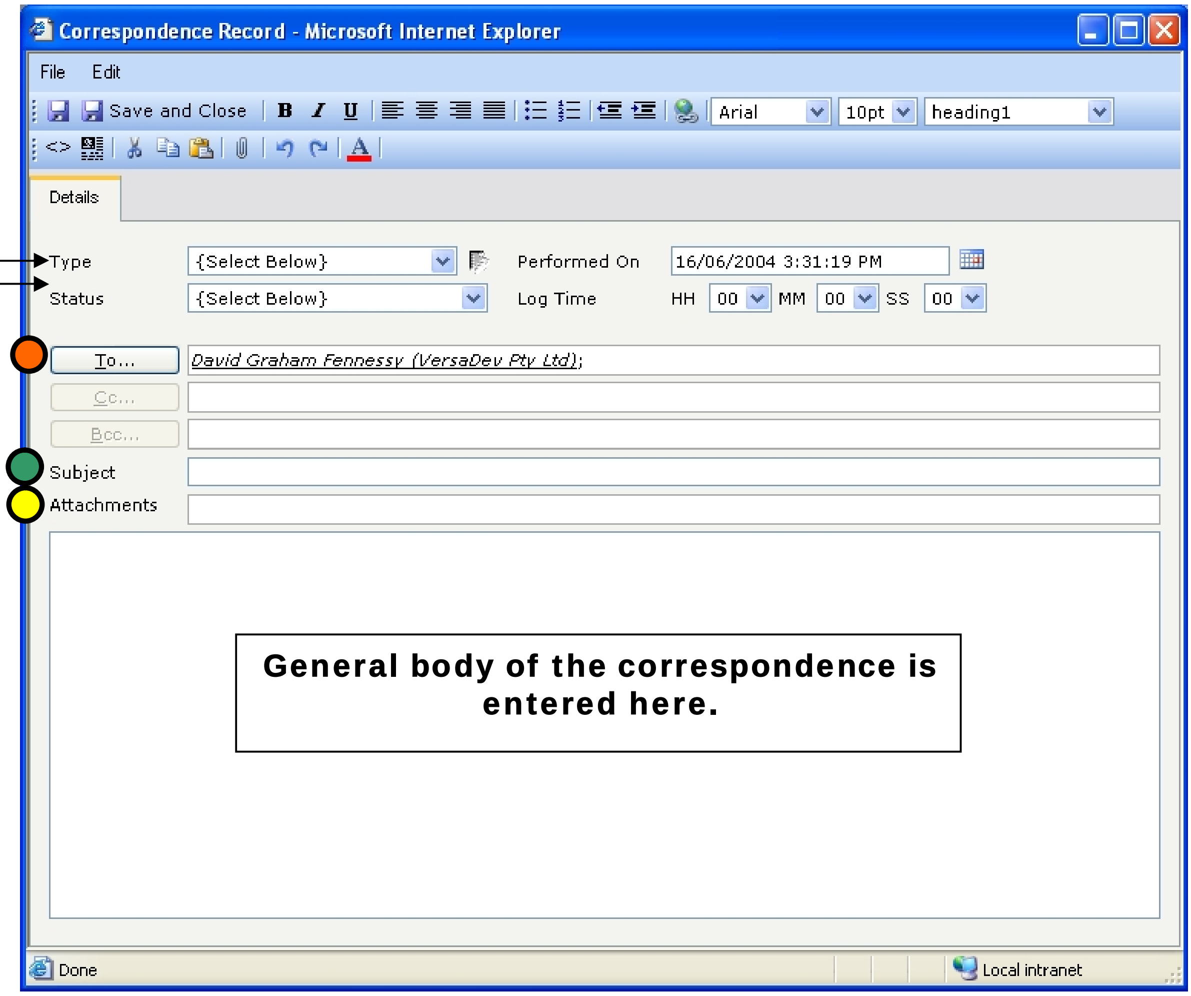
- **Select the required module (Contacts or Organizations).**

- **From the list of records returned, double click on the required record.**

- **Click on the Correspondence TAB**

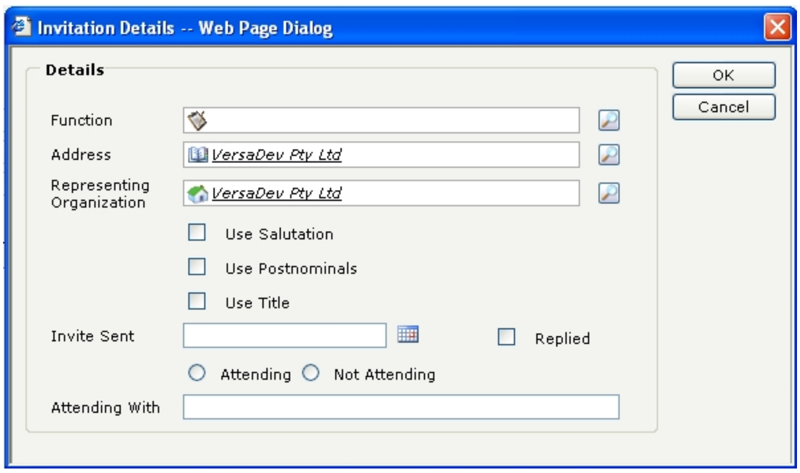
- **Click on** 

The following panel on the next page will be presented;



The TYPE field allows you to assign the TYPE of correspondence to be recorded. (Invitation/Phone/Fax/Email/SMS/Mail).

If Invitation is selected the icon next to the drop down box will activate, allowing you to define the Invitation details.



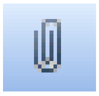
The STATUS field allows you to assign the relevant status of the correspondence.

- **By default the To… field will auto complete as it is assumed that the correspondence is relating to the contact in question. You can add additional system managed contacts, that may apply to the correspondence, by clicking on the To… button, then selecting them from the list.**

  The Cc… and Bcc… fields at present are not used in this implementation of the system and have been disabled.

- **The Subject field is the descriptive Subject of the correspondence.**

- **The Attachments field will detail any associated file attachments that may be related to the correspondence entry. Attachments (either a physical file or TRIM link) can be added by clicking on the PAPERCLIP icon from the Tool Bar at the top of the panel.**



Once you have entered all the relevant details in relation to the correspondence click on either the 'Save Icon' or the 'Save and Close Icon' to commit and save the record to the database.

Please Note!: The screen for recording correspondence looks very much like that used for sending an email, however, please be aware that the resultant correspondence record, when entered, *__is not__* delivered to the recipient via email or any other means. The correspondence recording screen simply records that some form of correspondence has been sent and is only a mechanism for recording that fact – it will not send the correspondence directly through the system.