



Training solvito.CRM-Modules

for

Sydfanér AB, SE-Vaggeryd

22. November 2005

Table of Contents	Standards	Addresses	Documents	Visits
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⇒ **Basic Instructions - Goals**

The instructions are limited to the first basic steps using the database modules in Lotus Notes.

■ **Standards**

Standard functions and function panels

■ **Addresses**

Information query and create new address

■ **Documents**

Create and file – letters, eMails and other documents

■ **Visits**

Appointment schedules and creating visit reports

Main Focus: You will learn...

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Standards

Addresses

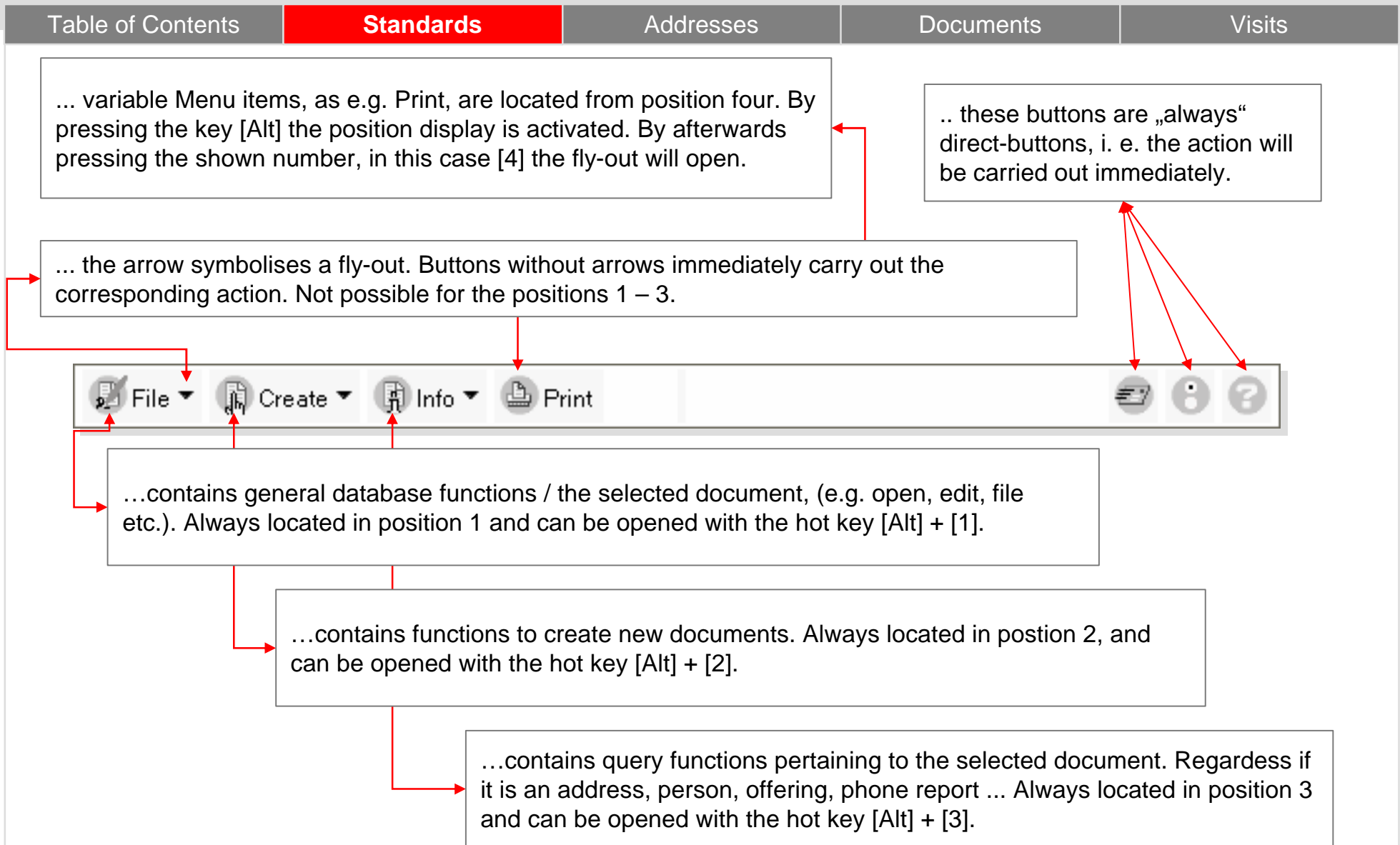
Documents

Visits

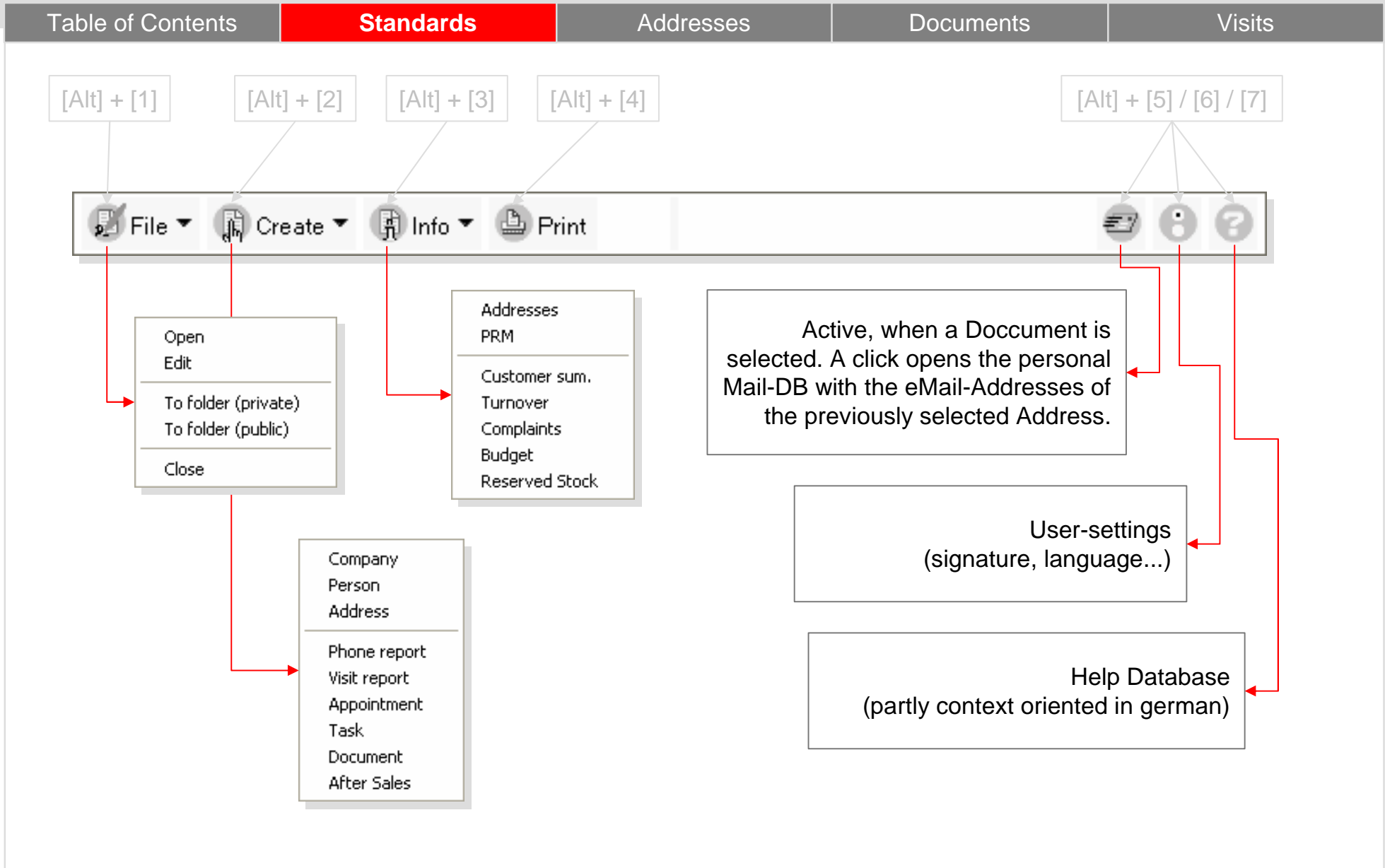
- ...how the standard menu bar is arranged.
- ...which hot keys (short cuts) are available.
- ...where and how user-specific settings can be changed.

Your Notes:

Menu Bar Arrangement



Examples from the view „Addresses“



User specific settings:

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Standards

Addresses

Documents

Visits

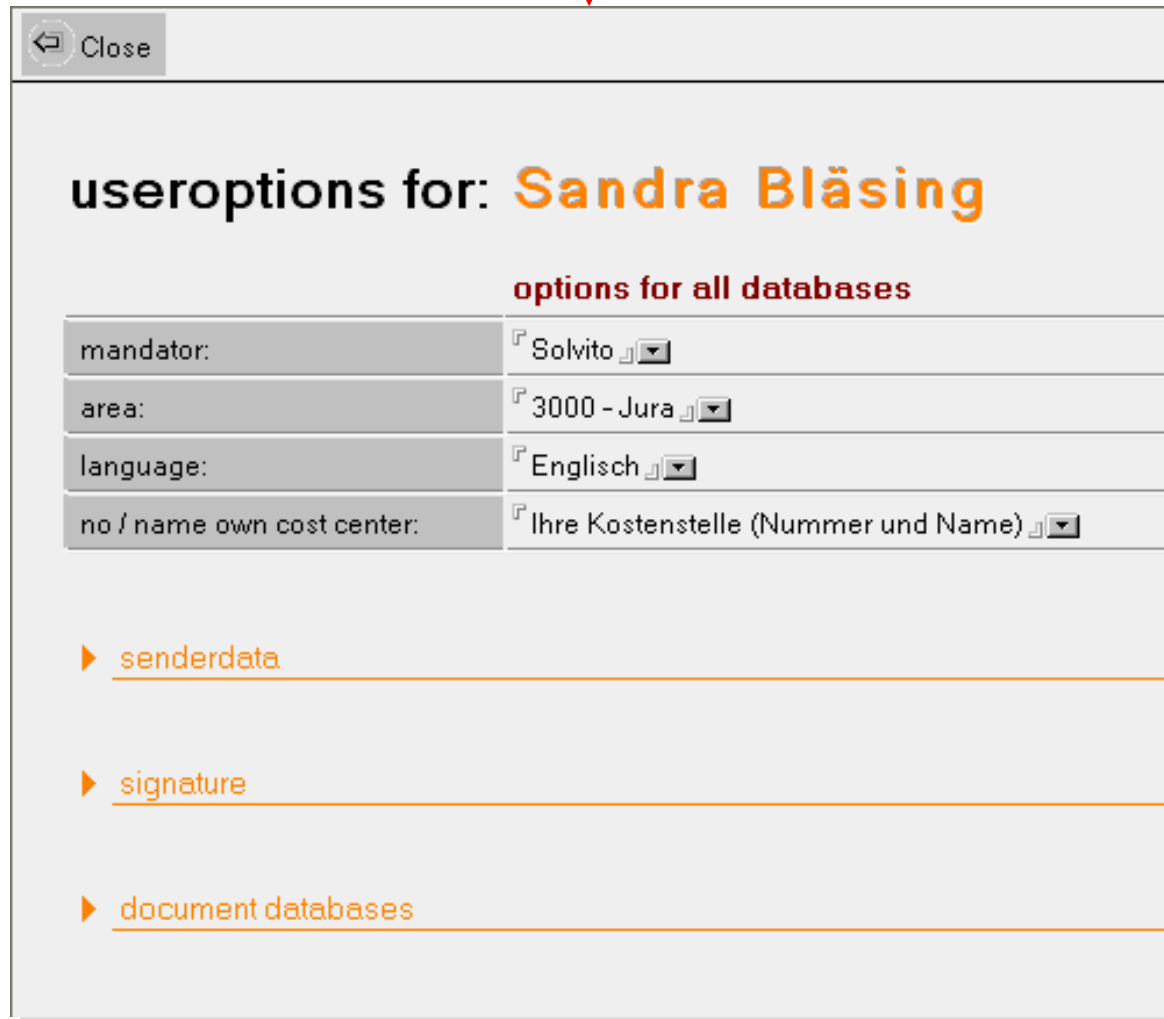
A click on  opens:

Area 1

Location, area and language according to pre-set key values.

Area 2

Here you file your profile and a Multilanguage signature once in the sender database.



Close

useroptions for: Sandra Bläsing

options for all databases

mandator:	☐ Solvito ▾
area:	☐ 3000 - Jura ▾
language:	☐ Englisch ▾
no / name own cost center:	☐ Ihre Kostenstelle (Nummer und Name) ▾

- ▶ [senderdata](#)
- ▶ [signature](#)
- ▶ [document databases](#)

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Standards

Addresses

Documents

Visits

- ... how to find an address and further information pertaining to your contact person from the given data.
- ... how to create new address documents, how to enter and maintain the information.
- ... how to select addresses according to certain criteria.

Your Notes:

First View:: „Addresses by... Company/SAP-No.“

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Add listed Addresses to a **distribution List**

Create new data: Company and/or Person

Open the address data using a double click

- Choice of different „views“
- „View“ = **Sort** the current database using **different criteria**

The screenshot displays the 'Addresses' view for the 'DANZERGROUP'. The main window shows a list of addresses with columns for 'Company / person', 'Status', 'Phone / mobile', 'eMail', 'Fax', and 'Department / position'. The list includes entries such as 'KARL DANZER GES.M.B.H. - 5082 GROEDIG - GOELLSTR. 20' and 'KARL DANZER LTD. - CM9 4QA MALDON - 46, MARKET HILL'. A sidebar on the left provides navigation options for 'Addresses...', 'Persons...', and 'Administration...'. The 'Addresses...' section is expanded, showing sub-options like 'Company / SAP No.', 'City', 'Postcode', 'Country', and 'Phone'. The 'Folder' section at the bottom left shows options for 'Selection (private)', 'Selection (public)', and 'Export'.

Create New Addresses

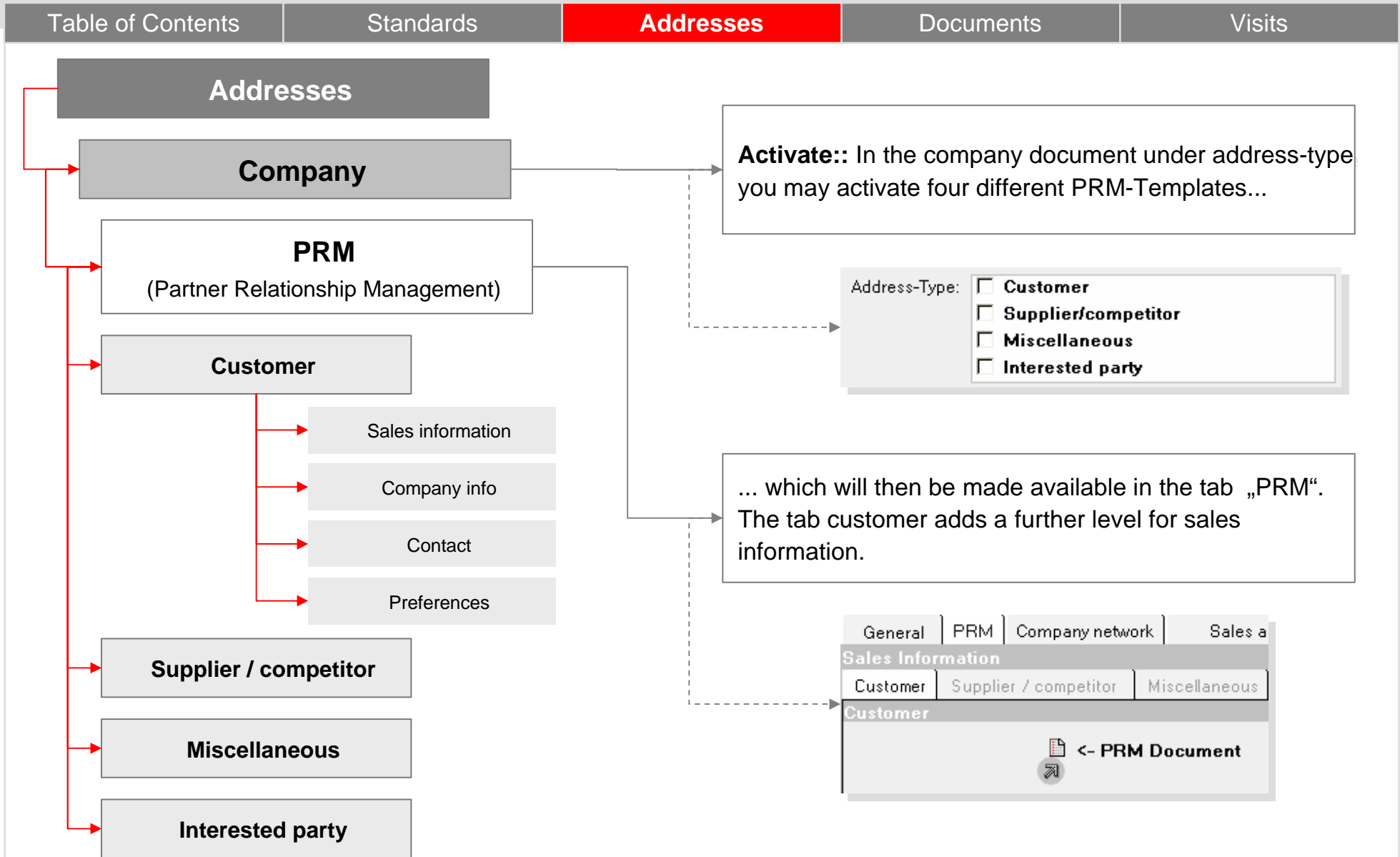
Table of Contents Standards **Addresses** Documents Visits

Display additional Information Create eMail.

Quick button panel
1. Create new...
2. Infos to...

Click on the various tabs to open the entry area for:

- PRM
- Company Network
- Sales Areas
- Contacts



PRM-Template for Customers, Suppliers/ Competitors, Miscellaneous and Interested Parties.

Table of Contents		Standards		Addresses		Documents		Visits	
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General	PRM	Company network	Sales area	Contact
---------	-----	-----------------	------------	---------

Sales Information

Customer	Supplier / competitor	Miscellaneous	Interested party
----------	-----------------------	---------------	------------------

Customer

<- PRM Document		Customer products: <input type="text"/>
Product: <input type="text"/>		Source: <input type="text"/>
Specie: <input type="text"/>		Turnover, lastyear: <input type="text" value="0"/>
Size Class: <input type="text"/>		Turnover, 2 years ago: <input type="text" value="0"/>
Certification requirements: <input type="text"/>		Econ. progress: <input type="text" value="0"/>

General	PRM	Company network	Sales area	Contact
---------	-----	-----------------	------------	---------

Sales Information

Customer	Supplier / competitor	Miscellaneous	Interested party
----------	-----------------------	---------------	------------------

Supplier / Competitor

Machines: <input type="text"/>	Financial status: <input type="text"/>
Product: <input type="text"/>	Customers: <input type="text"/>
Specie: <input type="text"/>	Suppliers: <input type="text"/>
Danzer Cust. No.: <input type="text"/>	Strategies: <input type="text"/>

General	PRM	Company network	Sales area	Contact
---------	-----	-----------------	------------	---------

Sales Information

Customer	Supplier / competitor	Miscellaneous	Interested party
----------	-----------------------	---------------	------------------

Miscellaneous

Type: <input type="text"/>

General	PRM	Company network	Sales area	Contact
---------	-----	-----------------	------------	---------

Sales Information

Customer	Supplier / competitor	Miscellaneous	Interested party
----------	-----------------------	---------------	------------------

Prospective Customer

Type: <input type="text"/>	Interest in: <input type="text"/>
----------------------------	-----------------------------------

PRM-Document for Customers

Table of Contents		Standards		Addresses		Documents		Visits	
Sales information		Company info		Contact		Preferences			
Sales Information									
Competitor:	<input type="text"/>	lock flag:	<input type="text"/>						
Complaint behavior:	<input type="text"/>	Credit limit:	<input type="text"/>						
Customer status:	<input type="text"/>	Dunning level:	<input type="text"/>						
Sales Agent:	<input type="text"/>	Liability:	<input type="text"/>						
Turnover, lastyear:	<input type="text" value="0"/>	Budget:	<input type="text"/>						
Turnover, 2 years ago:	<input type="text" value="0"/>	Trade Representative:	<input type="text"/>						
Econ. progress:	<input type="text" value="0"/>	Conditions of Delivery / Payment:	<input type="text"/>						
Payment history:	<input type="text"/>	Currency:	<input type="text"/>						
Advertising:	<input type="text"/>								
credit rating:	<input type="text"/>								
Sales information		Company info		Contact		Preferences			
Company Information									
Company name:	<input type="text" value="SOLVITO GMBH"/>			Alternative name:	<input type="text" value="SOLVITO"/>				
Street:	<input type="text" value="Alter Wall 67 / 69"/>			Addition:	<input type="text" value="Firmenzusatz Test"/>				
Postcode, City:	<input type="text" value="20457 HAMBURG"/>			Country prefix:	<input type="text" value="+49"/>				
City (P.O. Box):	<input type="text" value="Hamburg"/>			P.O. Box:	<input type="text" value="000000 Test"/>				
County:	<input type="text" value="DE Germany"/>			Postcode (P.O. Box):	<input type="text" value="22110"/>				
Phone:	<input type="text" value="+49) 040 / 68949560"/>			City (P.O. Box):	<input type="text" value="HAMBURG"/>				
Fax:	<input type="text" value="+49) 040 / 68949588"/>			Province (P.O. Box):	<input type="text" value="Hamburg"/>				
Homepage:	<input type="text" value="http://www.solvito.de"/>								
Sales information		Company info		Contact		Preferences			
Contact									
name	phone / mobile	eMa.							
Baumann, Petra	(+49) 040 / 68949569 0171 / 5626642	pbaumann@solvito.de	(49) 040 / 68949588						
Otto, Martin	(+49) 040 / 68949560 0175 / 5717901	motto@solvito.de	(49) 040 / 68949588						
Tester, Testine	(+49) 040 / 68949560	int							
Sales information		Company info		Contact		Preferences			
Preferences									
Main Database:	<input type="text" value="documents Grödig"/>			add. Address-Admin:	<input type="text" value="1802 - Kehl"/>				

Display Information related to an Address

Example: Customer File and Turnover

Table of Contents	Standards	Addresses	Documents	Visits
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- Info ▾
- Addresses
- PRM

- Customer sum. →
- Turnover →
- Complaints
- Budget
- Reserved Stock

DANZERGROUP Customer Info: SOLVITO GMBH Customer No. 2408881

Type: Kundenakte (Person) Kundenakte
 View by: Datum Status Typ Ersteller

type	date	subject	sta	in / out	creator	data base
▶ Aufgabe						
▶ Besuch						
▶ Besuchsbericht						
▶ offer						
▼ phone report						
	📞 10.06.2004	Dies ist ein Test zum Telefonbericht	📞	➔	Sandra Bläsing	Dokumente Grödig
	📞 08.06.2004	Hallo Petra	📞	➔	Christoph Hoelemann	Dokumente Grödig
▶ standard						
▶ Telefonbericht						
▼ Visit						
	📞 08.06.2004	Projektbesuch from Solvito at 08.06.2004	📞			Kontakte
	📞 08.06.2004	Routinebesuch from Solvito at 08.06.2004	📞			Kontakte

Turnover for Customer: SHELMAN SWISS HELLENIC WOOD, SAP No: 13642

View by: Specie

Sales org.	location	specie	thickness	grade	characteristics	sublength	type of cut	surface	min.	max.	av.	gross sales	currency
▼ +/-												619952,36	
▼ 2200												455286,33	
▶ 2200												455286,33	
▼ 3000												164666,03	
▶ 3000												164666,03	
▶ 271 OAK EUROPEAN												139471,66	
▶ 274 OAK RED AMERICAN												25194,37	
		0,5	23	4	P		1 Flat cut	0,5	1,3	1,3	1,3	62,45	
		0,5	23	4			1 Flat cut	0,5	1,3	1,3	1,3	3718,86	
		0,5	33	1	G		1 Flat cut	0,5	1,3	1,3	1,3	6246,41	
		0,5	33	1	S		1 Flat cut	0,5	1,3	1,3	1,3	1762,77	
		0,5	33	1			1 Flat cut	0,5	1,3	1,3	1,3	2835,16	
		0,5	35	1	G		1 Flat cut	0,5	1,1	1,1	1,1	7373,73	
		0,5	88	4	G		1 Flat cut	0,5	0,7	0,7	0,7	2854,93	
		0,5	88	4	S		1 Flat cut	0,5	0,7	0,7	0,7	340,06	

Address selection

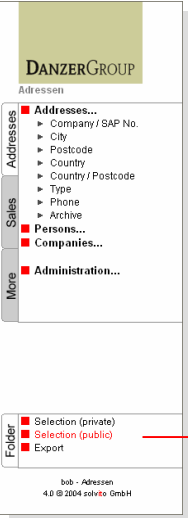
Table of Contents	Standards	Addresses	Documents	Visits
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[Alt] + [5] [Alt] + [6] [Alt] + [7]



- Refresh folder
- Export to file
- In distribution list
- Empty folder

2. Access the search template using the Button „Selection“.



- Folder
 - Selection (private)
 - Selection (public)
 - Export

1. Access the View „Folder“
Selection (privat) or Selection (public)

- You may select by company, people or information documents.
- Enter your search criteria.
- Using „Add“ the selected addresses will be added to the selection folder.
- Using „Delete“ the selected addresses will be deleted from the selection folder.
- The button „Reset“ removes the entered search criteria and sets it back in its original state.

Search

DANZERGROUP Selection

Type: **Company** Contact PRM (Division)

Adresstype

City

Postcode

Keyword

Source

Certification requirements

Branch

County

State

Product

Specie

Size Class

Product (supplier)

Specie (supplier)

Types of interested parties

interested in (interested parties)

Adresstype (other addresses)

Search Clear

Found documents: 5000 Add Remove

Close

Manual Selection using „Drag & Drop“

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Standards

Addresses

Documents

Visits

- Mark addresses, e.g. in the view „Sales / Addresses by Company / SAP-No.“
- ...click on a document and hold the mouse button pressed...
- ... move the document into the selection folder using the mouse.

HINT:: before each selection, check the folder for ist contents.

DANZERGROUP
 Adressen

File
Create
Info
Print

Company / person	Status	Phone / mobile	eMai	Fax	Department / position
▶ SOLID WOOD - 15535 CLEARVILLE - 411 S. BLACK VALLEY RD.					
▶ SOLID WOOD DOORS S.A. - GUATAMALA CITY - 2A CALLE B 12-85 Z 15 COLONIATECUN					
▶ SOLID WOODS - 95472 SEBASTOPEL - 5000 BLANK ROAD					
▶ SOLIDWOOD NV - 8730 BEERNEM - NIJVERHEIDSSTRAAT 7					
▶ SOLIMAN BROTHERS INC - 46240 INDIANAPOLIS - 4611 RIVER RIDGE DRIVE					
▶ Solitera spol. s r.o - 26801 Horovice - Palackého nám.77					
▶ SOLO - SINDELINGEN -					
▶ SOLOMBALSKIY LDK - 163012 ARKHANGELSK - 1-A, DOBROLYUBOVA STREET					
▶ SOLOMBALSKIY LDK - 163012 Arkhangelsk - 1-A. Dobrolyubova Street					
▶ SOLOMON WOODWORKING - 17842 MIDDLEBURG - RR1, BOX 282					
▶ SOLTZ SAWMILL INC - 19539 MERTZTOWN - 33 PARK AVE					
▶ SOLUTION 3R - J3G 5A9 BELOEIL - 1141 DESMARAIS					
▶ SOLUTION 3R INC. - J2E 1J8 Drummondville - 5210 Olivier					
▼ SOLVITO GMBH - 20457 HAMBURG - Alter Wall 67 / 69					
✓ SOLVITO GMBH		(+49) 040 / 68949560	★	★	
✓ F Dr. Baumann Petra	aktiv	(+49) 040 / 68949569 0171 / 5626642	★	★	
✓ F Dr. Tester Testine	aktiv	(+49) 040 / 68949560	★	★	Abteilung Test Position Test
✓ M Otto Martin	geplant	(+49) 040 / 68949560 0175 / 5717901	★	★	
▼ solvito Qualitätssicherung GmbH - 20458 Hamburg - Noch älterer Wall 67 / 69					
✓ solvito Qualitätssicherung GmbH		(+49) 040 / 689495	★	★	
✓ F Bläsing Sandra	active	(+49) 040 / 689495 (+49) 0172 / 4558932	★	★	
▶ solvito xxx --					
▶ solvito xxx23 --					
Folder Selection (private) Selection (public) Export					
SOLVITO GMBH					
▶ SOMADEC SARI - 76960 NOTRE-DAME-DE-BONDEVILLE - B P 25.195.ROUTE DE DIEPPE					
▶ SOMALI NV - 2900 SCHOTEN - INDUSTRIELAAN 42					
▶ SOMAT S.A.R.L. - BONANJO/DOUALA - B.P. 1172					
▶ SOMATI PROMAN NV - 9320 AALST-EREMBODEGEM - INDUSTRIELAAN 19					
▶ SOMERSET GRAPHICS CO LTD - L4Z 2C2 MISSISSAUGA - 370 BRUNEL ROAD					
▶ SOMERSET HARDWOOD LUMBER CO., INC. - SOMERSET -					

bob - Adressen
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Main Focus:: You will learn...

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Standards

Addresses

Documents

Visits

- ...how to create a document.
- ...how to use existing addresses for single documents.
- ...which document types are available.

Your Notes:

Table of Contents	Standards	Addresses	Documents	Visits
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Database name

Choice of various „Views“

You will recognize new or changed documents immediately.

Click on „Create“ to create a multifunction-document: letter, eMail, fax .. select the criteria in the document itself.

Using the button „Actions“ you may- for example- place the file.

The screenshot shows the Solvito Documents interface. At the top, there is a menu bar with options: File, Create, Info, Print, and Action. Below the menu bar is a table of documents. The table has columns for date, token, company, and subject. The documents are grouped into sections: Qualitätssicherung, Test, and (not discarded). The document with date 08.06.2004 and subject 'Hallo Petra' is highlighted. On the left side, there is a sidebar menu with options: in-box, Documents by..., Reminder..., and DB-Admin... The sidebar menu is divided into Mainview and Serial dispatch sections. A red arrow points from the 'Database name' text to the 'Dokumente Grödig' label in the sidebar. Another red arrow points from the 'Choice of various „Views“' text to the 'Actions' button in the menu bar.

date	token	company	subject
▼ Qualitätssicherung			
10.06.2004	SB	SOLVITO GMBH	Phone Report
10.06.2004	SB	solvito Qualitätssicherung GmbH	Phone Report
10.06.2004	SB		Offer
09.06.2004	SB-QS	solvito Qualitätssicherung GmbH	Letter
▶ 08.06.2004	Ihr rzeich	SOLVITO GMBH	Angebot vom 08.06.2004
▶ 07.06.2004	CH	NETTROPOLIS GMBH	Visit Report Response
▶ Test			
▼ (not discarded)			
08.06.2004	CH	NETTROPOLIS GMBH	Annahme des Angebotes
▶ 08.06.2004	CH	SOLVITO GMBH	Hallo Petra
08.06.2004	CH		
01.06.2004	PB	SOLVITO GMBH	

bob - Dokumente Grödig
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Create and Edit Document

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Visits

Detail information is defined in the Doc-Type.

Using „Send“ the doc can be sent, or if installed, the doc can be sent directly per fax from the database.

HINT:: Always select a file address from the tab „Company“ – only in this manner will you create an entry in the customer file.

File Create Info Print Action Send

Dokumente Grödig to status Provides here 11.06.2004 13:41:13

DANZERGROUP form type standard template Letter with Companylogo (F)

receiver
Address eMail
postal address

classification
Context Recipient Consignee Company History
classification
filing
keywords
procedure

workflow
reminder yes no
delete automatically yes no
secure private
file status

subject initials Ihr Kurzzeichen city, date Absenderort für Briefe, 11.06.2004

salutation

content

Main Focus:: You will learn...

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Standards

Addresses

Documents

Visits

- ...how and where to create a visit schedule.
- ...how to create a visit report.
- ...which summaries are at your disposal.

Your Notes:

Visit Scheduling:: First Page

Table of Contents	Standards	Addresses	Documents	Visits
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You may select a summary of the „Visit reports“ from all databases.

Choice of different „Views“

DANZERGROUP
Kontakte

- **Calender**
 - All..
 - by company
 - by content
 - by visitor
- Visit Reports...
- monthly statistics...
- weekly statistics...
- monthly statistics country...
- weekly statistics country...

bob - Kontakte
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date	visitor	content	contact person	visit	cancel	report	phone
► KARL DANZER GES.M.B.H.				1	0	0	0
▼ NETTROPOLIS GMBH				1	0	1	0
07.06.2004	✓ Solvito	Akquisition	Herr Leibold				
▼ SOLVITO GMBH				6	1	2	3
20.05.2004	✗ Sandra Bläsing	Complaint	Frau Testine Tester				
08.06.2004	Martin Otto		Martin Otto				
09.06.2004	✓ Sandra Bläsing	Beanstandung	Frau Sandra Bläsing				
10.06.2004	Sandra Bläsing	Einladung	Testine Tester				
10.06.2004	Martin Otto	Projekt	Mrs. Petra Baumann				
10.06.2004	✓ Sandra Bläsing	Beanstandung	Frau Testine Tester				
11.06.2004	Martin Otto	Beanstandung	Mrs. Petra Baumann				
► solvito Qualitätssicherung GmbH				5	0	1	1
				13	1	4	4

Visit Scheduling:: New Appointment

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Visits

Appointments are automatically added to your personal calendar.

→ Action ▾

choose address

Using the button „Action / choose address“ the entry is also added to the customer file.

DANZERGROUP Appointment

date / time	
date:	<input type="text" value="11.06.2004"/> 16
time:	<input type="text" value="14:00 - 15:00"/> ⌚
visitor:	<input type="text" value="Sandra Blasing"/> ⌵
initiative of:	<input type="text"/> ⌵
type of attendance:	<input type="text"/> ⌵
content:	<input type="checkbox"/> Complaint <input type="checkbox"/> New Inquiry <input type="checkbox"/> Info request <input type="checkbox"/> Dunning <input type="checkbox"/> Appointment <input type="checkbox"/> Invitation <input type="checkbox"/> Order confirmation <input type="checkbox"/> Negotiation <input type="checkbox"/> Acquisition <input type="checkbox"/> Project
meeting place:	<input type="text"/> ⌵
status:	<input checked="" type="radio"/> fixed <input type="radio"/> planned <input type="radio"/> cancelled
other remarks for planning <input type="text"/>	

Company details

contact / customer	
customer:	<input type="text"/> ⌵
	<input type="text"/> ⌵
# of contacts:	<input type="text" value="0"/>
sector:	<input type="text"/>

Visit Scheduling:: Overview

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Standards

Addresses

Documents

Visits

Kontakte

- ▶ Calendar
- All..
 - ▶ by company
 - ▶ by content
 - ▶ by visitor
- Visit Reports...
- monthly statistics...
- weekly statistics...
- monthly statistics country...
- weekly statistics country...

File Create Info Print

	date	contact person	content	visits	cancel	report	phone
▶		Christoph Hoelemann		4	0	0	0
▶		Martin Otto		2	0	0	1
▼		Sandra Bläsing		4	1	3	2
▼		KARL DANZER GES.M.B.H.		1	0	0	0
	12.07.2004	Herr Wolfgang Pabinger	Info request				
▼		SOLVITO GMBH		2	1	2	1
	20.05.2004	Frau Testine Tester	Complaint				
	09.06.2004	Frau Sandra Bläsing	Beanstandung				
	10.06.2004	Testine Tester	Einladung				
	10.06.2004	Frau Testine Tester	Beanstandung				
▼		solvito Qualitätssicherung GmbH		1	0	1	1
	10.06.2004	SB	New Inquiry				
	09.06.2004	Frau Sandra Bläsing	Beanstandung				
▶		Solvito		3	0	1	1
				13	1	4	4

Thank you for your attention

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