



Lotus Domino® Application



GeoCom®
Customer & Contacts

Version 5.1 Build 248 - 15th January 2004

Update 5.1 Build 248

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1 Introduction

This documentation describes the changes to GeoCom® Customer & Contacts 5.1 Build 248.

With the update GeoCom® Customer & Contacts 5.1 Build 248 we will introduce some improvements which will be explained in the following.

2 New licence key necessary

Together with the update GeoCom® Customer & Contacts 5.1 Build 248 a new licence key is delivered which has to be entered into the according section of the global configuration document.

3 Layout

GeoCom® Customer & Contacts version 5.1 Build 248 includes some changes to the layout in comparison to previous versions of the application.

Basically the changes contain a new start menu to operate GeoCom® Customer & Contacts and a newly designed navigator.

3.1 Main Menu



The main menu opens automatically on starting GeoCom® Customer & Contacts (in case the function was not disabled in the personal configuration), or on using the according button which can be seen in all views.

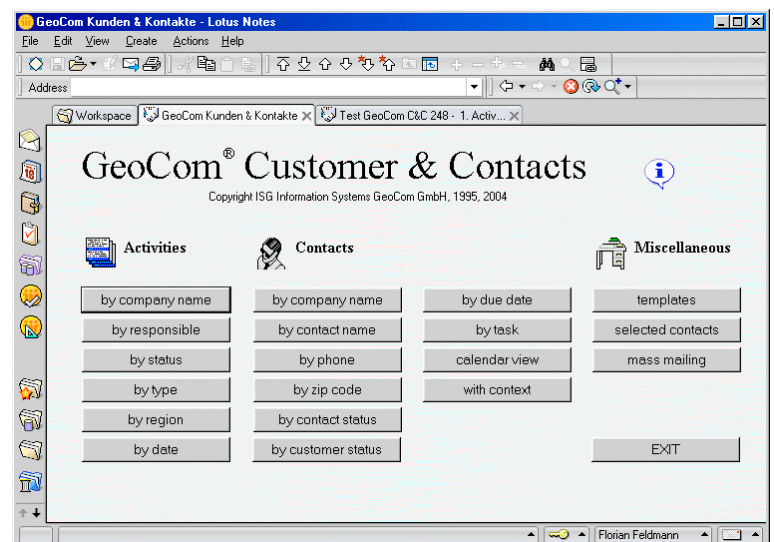


Illustration: Main menu

From here you have access to the groups of views “Activities”, “Contacts”, “Re-submission”, and “ Miscellaneous“. A click on a button reveals the according view in the navigator.

3.2 New navigator

The layout of the navigator has also been changed.

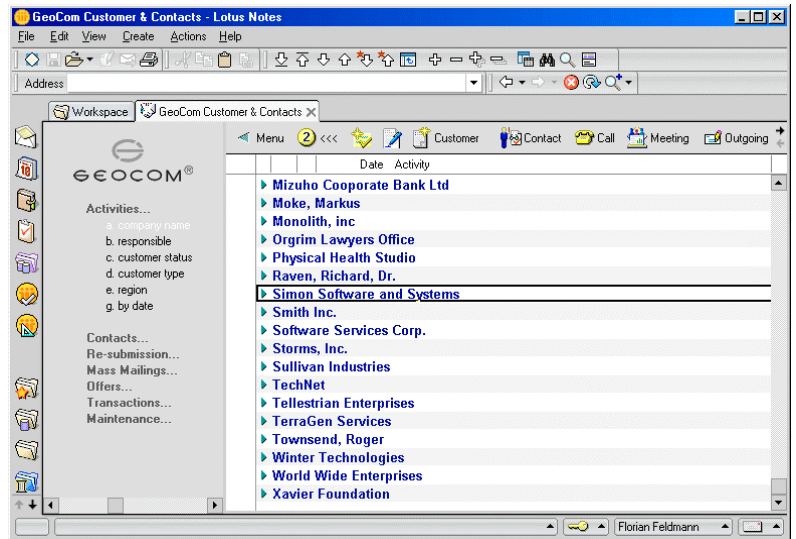


Illustration: Standard navigator (showing view “Activities”)

Using the standard navigator you will see the following views, groups of views or folders (depending on corresponding access rights).

- Activities
- Contacts
- Re-submission*
- Mass mailings*
- Offers*
- Transactions*
- Maintenance*

*access rights necessary

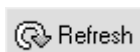
4 Views / Folders

With the new layout of the navigator some changes to the structure of the available views and folders have been implemented. These are explained in the following.

4.1 Lost documents

Documents that do not belong to a “parent document”, e.g. contact profiles whose associated customer profile was – by accident or on purpose – deleted, are now to be found in the folder “Maintenance – lost documents”.

Due to the fact that this is a not a view, but a folder, the refresh has to be done manually using a special action that you can access via the according button in the action bar. All documents in the data base are now checked for an associated “parent document”. Those documents which are not related to such a document are saved in the folder “Maintenance – lost documents”.



This folder will only be displayed when the role [Admin-de] respectively [Admin-uk] was activated in the access control list.

4.2 Views "...by date"

In the view “Activities... – g. by date“ all documents existing in the data base are displayed. They can be sorted by date of last modification, of creation or by responsible and date.

Thus, this view combines the former views “all documents by date“ and “admin – documents by date of modification”.

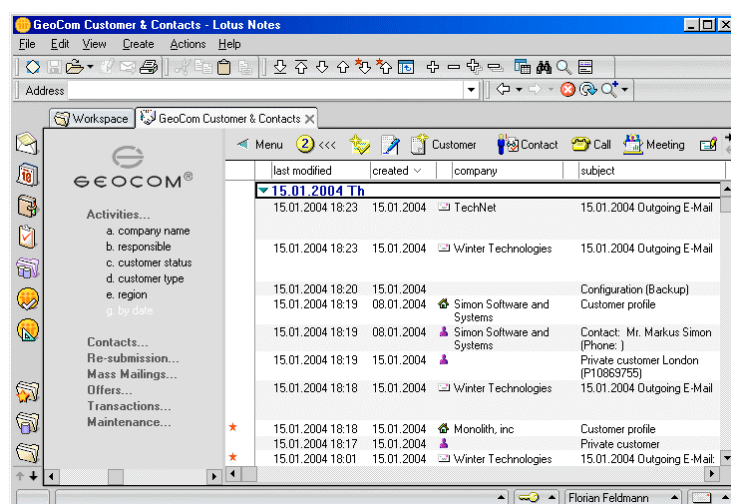


Illustration: View “Activities – g. by date”

4.3 Re-submission

The group of view “Re-submission” is now linked to a special role in the ACL ([ViewTickler-de] resp. -uk]) and is only shown when this role is activated.

Also in the start menu the column “Re-submission” is only displayed when the according role is activated.

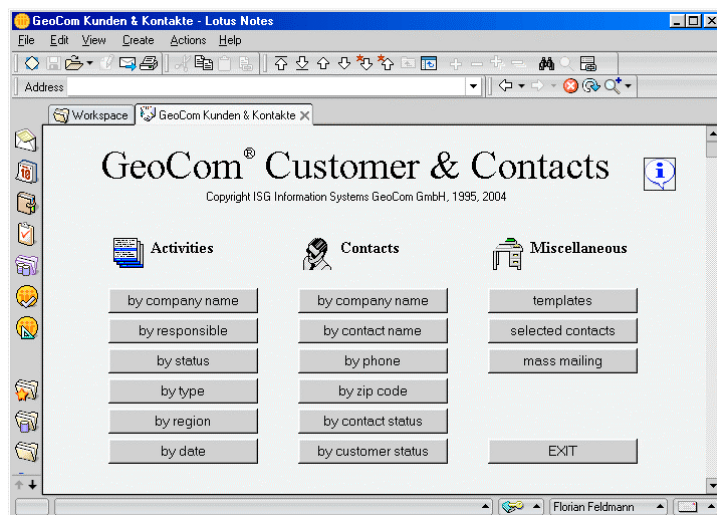


Illustration: Main menu without tickler views

4.4 Mass mailing

The view “personal folders – mass mailing” was replaced by the general view “mass mailing”.

This view is divided into three other views:

- templates (see 8 Templates)
- selected contacts (see 12.4 Search form for contacts)
- mass mailing

The view „mass mailing“ contains all documents created with the mass mailing function.

Mass mailings that are to be sent as e-mails can be sent directly out of this view (action “send document”). After sending an e-mail the sending date is indicated so that it is obvious which documents still have to be sent.

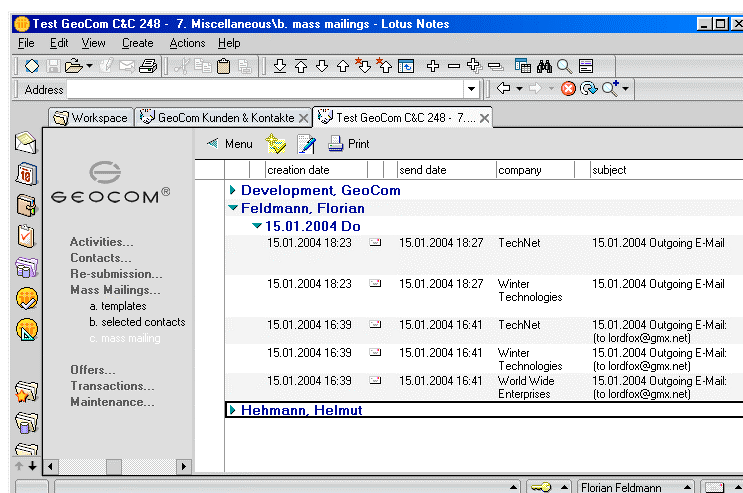


Illustration: View “Mass Mailings...”

Furthermore, e-mails which are created with the mass mailing function are all provided with the same creation date, irrespectively of the date and time they were actually created on the server.

5 Form customer profile

The layout of the form for customer profiles was not changed, but some new fields were added which should be explained in the following.

5.1 New field: Customer serial number

Having set the according configuration, every newly created customer profile is provided with a consecutive customer number which from now on will be shown in the header of the customer profile.

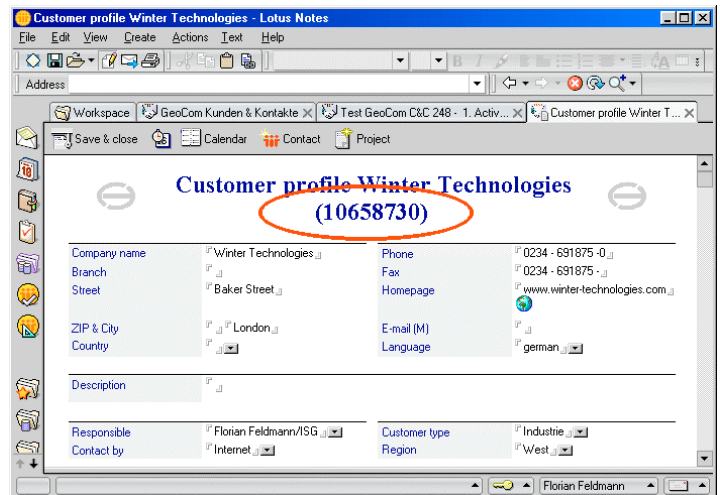


Illustration: Header of a customer profile

The format of this customer number is defined in the global configuration (see 11.2 Customer serial number).

To change existing customer numbers use the action "Admin – Modify customer id..." from menu.

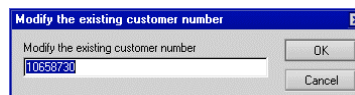


Illustration: Dialog change customer ID

5.2 New field: Language

To define the language that should be used with the customer, in the first part of the customer profile the new selection field “Language” is at your disposal.

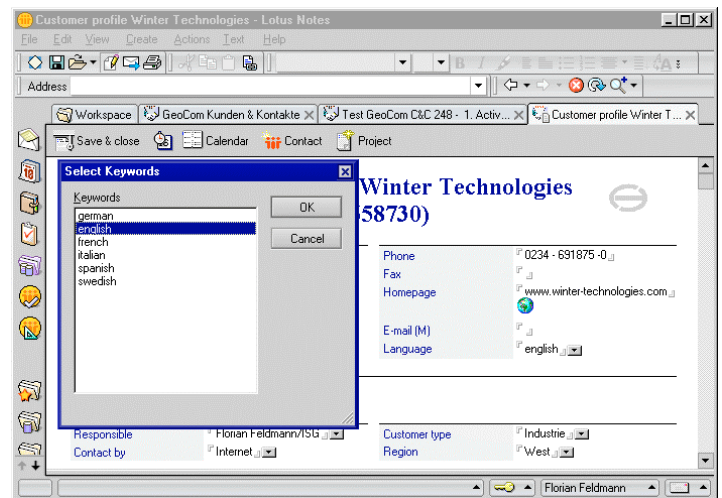


Illustration: Language selection for customer profile

The selection field “Language” can be used, e.g. for communication independent of the local language settings of the application.

Example: An employee uses the English interface of the application. Due to the global configuration settings and the concerning customer profile outgoing E-Mails to a German company are provided with a German salutation while E-Mails to a French company are started with a French salutation.

5.3 New fields: Attributes 1 –3

So far the fields “Attribute” 1“ and “Attribute 2“ only existed in the contact profiles.

Now these fields are not only complemented by “Attribut 3” but are also available in the form for customer profiles. In the global configuration these three fields can now be named and moreover provided with pre-determined values for selection lists (see 11.3 Attributes).

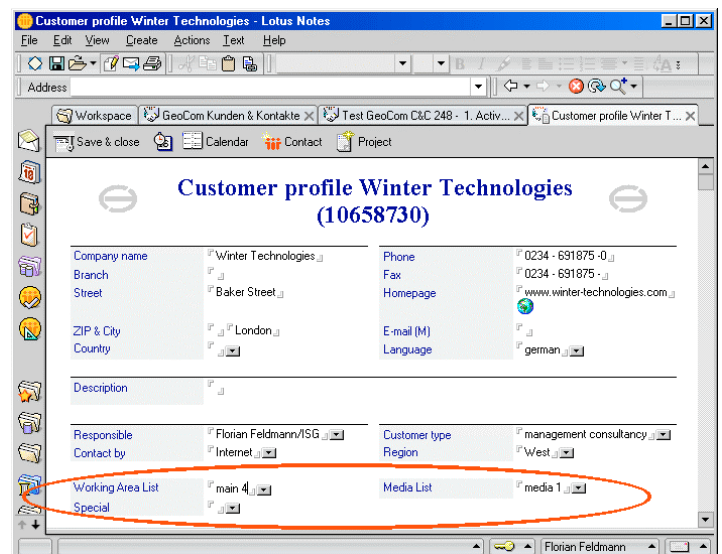


Illustration: Fields Attribute 1-3 (here: “Working Area List”, “Media List” and “Special”)

6 Form contact / private customers

The following chapter deals with the changes to the form for contacts respectively private customers.

6.1 New fields: Phone

The previous field "Phone" was splitted up into the three fields

- Phone Business
- Phone Mobile
- Phone Private

This way you can indicate several telephone numbers for each contact.

6.2 New field: Language

Private customers respectively contact profiles provide, just alike to the customer profile, the possibility to allocate a language to every person.

6.3 New field: Attribute 3

To the fields "Attribute 1" and "Attribute 2" a third attribute field was added. Furthermore, these three fields can now be named and moreover provided with pre-determined values for selection lists in the global configuration document.

6.4 New field: Customer serial number

This field is only available for private customer profiles and company profiles, NOT for contact profiles. It has got the same effects like the field "customer serial number" in the customer profile, however can be configured independent of that.

7 Forms in general

Some changes affect not only a few but all forms used in GeoCom® Customer & Contacts. These changes are described below.

7.1 Selection lists

Entering the values of the pre-defined selection lists, now different pop-up windows are shown:

If in the configuration the field “New values allowed” is checkmarked with “Yes”, a pop-up window appears which beside a selection list offers a line for your own description entries.

Is this field checkmarked with “No” the appearing pop-up window only shows the selection list.

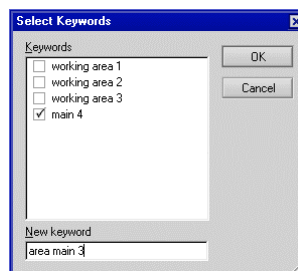


Illustration: Selection list with entry line

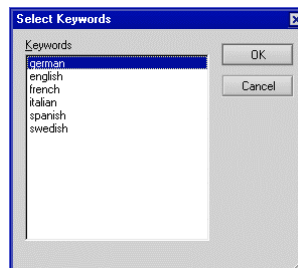


Illustration: Selection list without entry line

7.2 Customer specific headers

The logos appearing in all forms can now be replaced by any other graphic in the configuration (see **Fehler! Verweisquelle konnte nicht gefunden werden.**, Customer specific headers in forms)

The screenshot shows a Lotus Notes form for a customer profile. The title bar reads 'Customer profile Winter Technologies - Lotus Notes'. The form content is as follows:

Customer profile Winter Technologies (10658730)			
Company name	Winter Technologies	Phone	0234 - 691875 - 0
Branch		Fax	0234 - 691875 -
Street	Baker Street	Homepage	www.winter-technologies.com
ZIP & City	London	E-mail (M)	
Country		Language	german
Description			
Responsible	Florian Feldmann/ISG	Customer type	management consultancy
Contact by	Internet	Region	West
Working Area List	main 4	Media List	media 1
Special			

Illustration: Form with special header

8 Templates

The templates now can be found in the navigator section “Mass Mailing” (from start menu under “Miscellaneous”).

8.1 New Templates

So far templates could only be created for e-mails, mass mailings or letters.

Additionally you have now the possibility to create templates for the document types “Meeting”, “Call”, “Miscellaneous”, “Offer” and “Transaction”.

For all of these document types can be pre-defined whether or not templates should be used (see **Fehler! Verweisquelle konnte nicht gefunden werden.**, Templates).

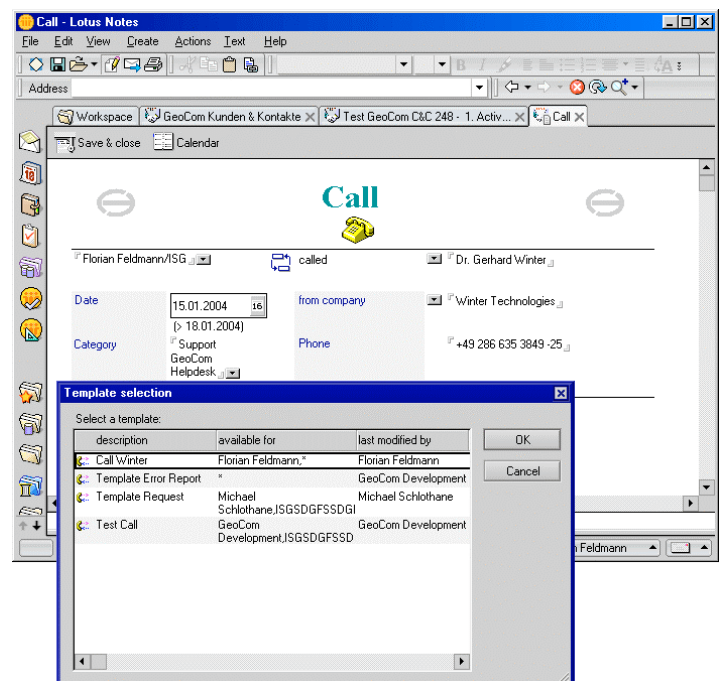


Illustration: Call with template

8.2 Templates for outgoing documents

The selection of outgoing documents occurs in two steps:

1. Selection of the document type
2. Selection of the template that should be used (if a template is in use)

In the personal configuration can be specified whether the template is to be chosen via the user name of the creator or from a list.

In both cases only the templates belonging to the corresponding document type are offered.

9 Short lists

Short lists are one of GeoCom® Customer & Contacts' new options in version 5.1 Build 248.

Via the corresponding button a short list containing all currently selected customer and/or contact profiles can be created.



From a dialogue box the type of short list can be selected (e.g. "Name, Company, Phone").

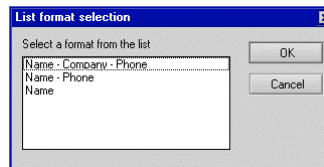


Illustration: Dialog create short list

By clicking the OK button the short list will be created using the selected options.

9.1 Special format for short lists

Within the personal configuration document, settings for the layout of short lists can be specified as well as a special format for creating your own short lists (see 10.7 Short lists).

10 Personal configuration

The personal configuration document has been extended by the following fields.

10.1 Standard configuration for new users

The system administrator can now specify a standard configuration for new users (see 12.7 Modify standard configuration).

From within the personal configuration document the action “Use settings for new users” can be used to overwrite the current personal configuration with the settings specified in the standard configuration.

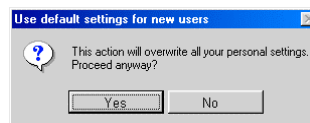


Illustration: Security check before overwriting configuration

10.2 Default Responsible

Within the sections “Customer profile”, “Contact profile” and “Private customer” a default responsible for these document types each can be specified.

If a user creates a document of one of these types, the name specified herein will automatically be declared the default responsible for this document.

Independent of these configuration settings, the responsible person for a document can also be selected and entered manually.

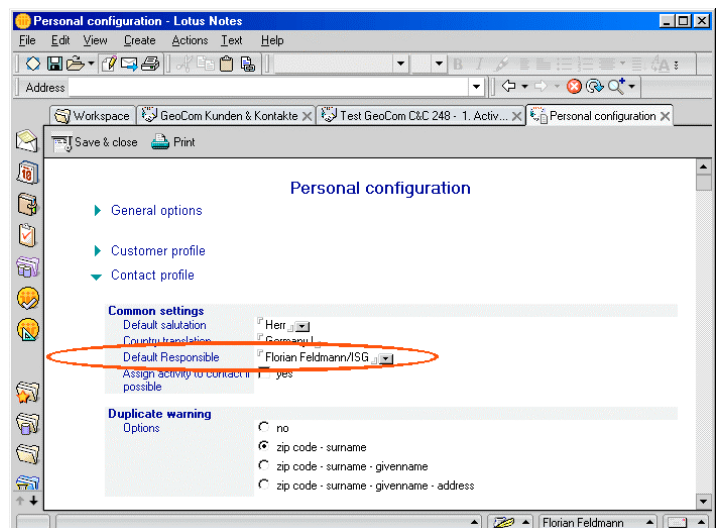


Illustration: Default responsible

10.3 Duplicate warning

Within the corresponding sections in the personal configuration, the way of duplicate warning can be specified.

Possible settings are

for customer profiles:

- no
- zip code – customer name
- zip code – customer name – Address

for contact profiles as well as private customers:

- no
- zip code – surname
- zip code – surname – givenname
- zip code – surname – givenname – address

10.4 Settings for letter salutation / postal address

The formats for letter salutation and postal address can also be specified each for customer profiles, contact profiles and private customers.

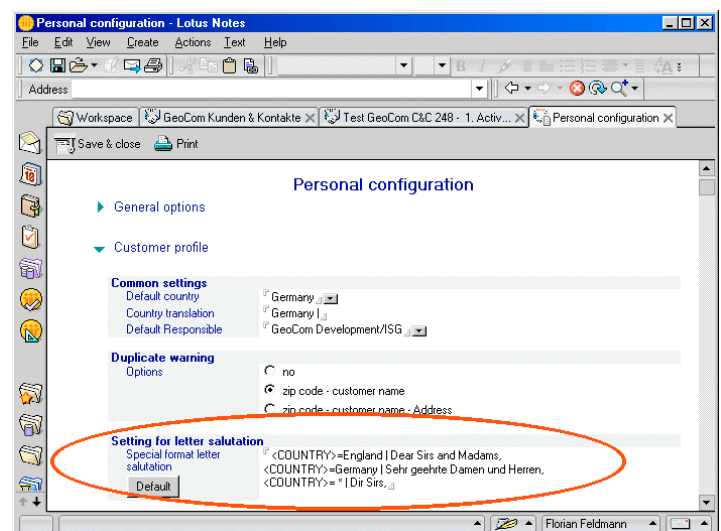


Illustration: Example for letter salutation settings

The settings specified within the personal configuration document have higher priority than the corresponding settings within the global configuration. Only in case the settings from the personal configuration document are missing the global settings will be used.

Clicking the button "Default" will overwrite the settings within the personal configuration with the settings from the global configuration document.

10.5 Re-submission for documents

For all document types used within the application (letter A4, Microsoft Word document, e-mail, call, meeting, miscellaneous, offer and transaction) an automatic re-submission can be configured in the personal configuration document.

For each document type the following values can be specified: Offset

in days, responsible and action.

If a user creates a document of the corresponding type, upon saving the document a dialog will be opened proposing a re-submission on the specified date (nn days later) to the specified person with the specified action. These values however, can be arbitrary edited before confirming with OK, which enters a re-submission with the specified parameters into the current location document.

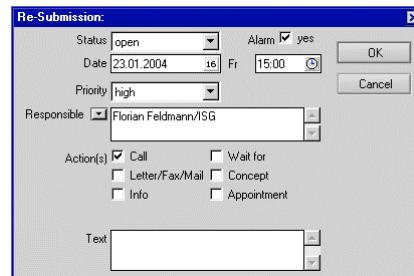


Illustration: Dialog re-submission

10.6 Templates

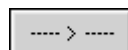
Within the section “Templates” a default value for the field “Template used by...” can be specified.

You can also specify whether selection of templates for outgoing documents should be sorted by user names or shown as a flat list.

10.7 Short lists

The section “short lists” contains settings for a special short list format.

The field “Header” holds the headline for all your short lists, the field “Description” shows the name for your personal special format.



The format button opens a list of available format settings which can be entered into the field “Settings” which holds the format definitions for your special format.

Into the field “Format definition” you can now enter the building rules for your personal format. Clicking the corresponding format button will again open a list containing the available definitions.

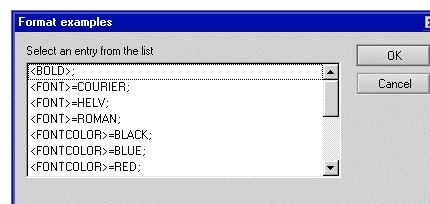


Illustration: Definition list

10.8 Global policy

The system administrator has the option to specify a global policy for personal configuration settings (see 11.9 Global policy for personal settings).

Certain aspects of the personal configuration document cannot be changed by the user any more, once a global policy is active. If a user tries to change a parameter which is defined in the global policy, upon saving the document a dialog box will appear containing a corresponding message and the parameter will be reset to the value specified within the policy.

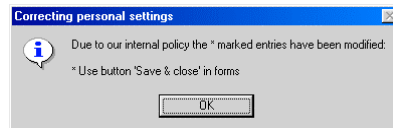


Illustration: Global policy warning

11 Global configuration

The global configuration document is enhanced by the following fields and options.

11.1 Synchronizing fields: Customer profiles and contact profiles

The synchronising function of fields e.g. between customer profiles and contact profiles can be configured within the section “customer” (or within the section “private customer”, resp.).

The fields that should be synchronized everytime have to be specified within the first field of this section. Contrary to this, the second field offers the possibility to define those fields, that should only be synchronized when the option “Update from customer profile” within the contact document is selected.

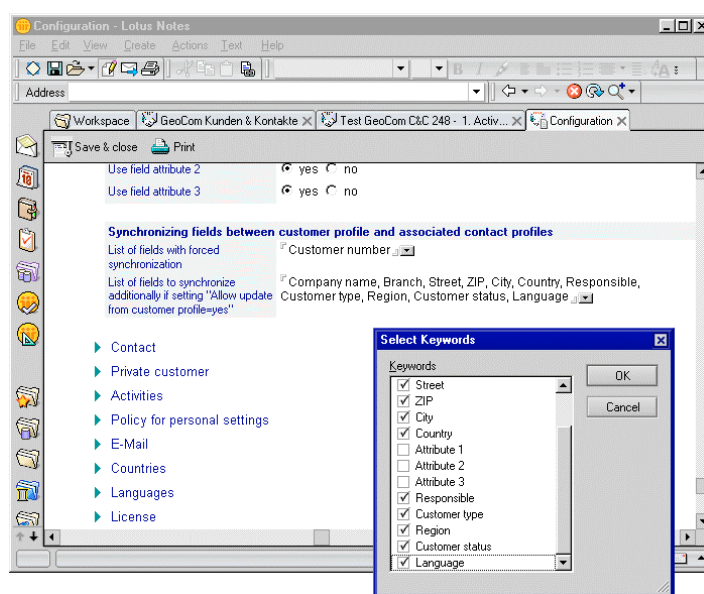


Illustration: Synchronizing fields

11.2 Customer serial number

The format as well as the number of places for a consecutive ID (customer serial number) can be fixed within the sections “private customer” and “customer”. These numbers will be automatically assigned while saving a new profile and displayed from now on within the header of the customer profile (see also 5.1 and 6.4, New field:).

11.3 Attributes

The fields „Attribute 1“ und “Attribute 2“ are completed by a third attribute field. Now these fields can also be displayed – like to the other contact documents – within the form to record new customer profiles.

To do so, select within the configuration section “Customer profile“ and under the notation “show additional attributes“ the corresponding fields the option “yes“.

Furthermore the configuration section “Contact profile“ serves to set the denomination of these three fields. Beyond this it is possible to configure the appropriate selection lists (this configuration is effected analogous to the other selection lists).

11.4 Pre-selection letter salutation / adress format

The settings fixed within the global configuration document will only be used if there are no corresponding settings within the personal configuration document

The button “default“ causes the letter and adress settings to be overwritten by the default values of the application.

11.5 Language

The section “Languages“ offers – seperately for the german and english user interface - the possibility to define a list of languages (incl. language codes).

11.6 Private customer with contact profiles

Within the section “Private customer“ you can now specify, whether or not contact profiles to private customers may be created.

These contact profiles will be handled just like contacts assigned to customer profiles.

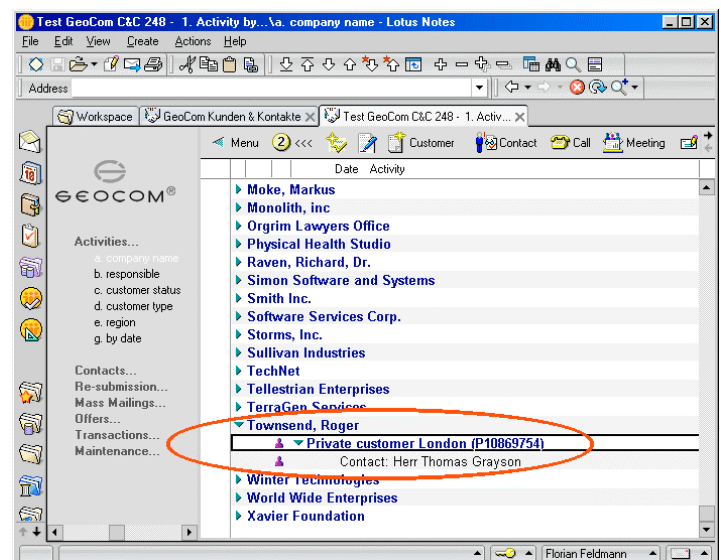


Illustration: Private customer with contact profile

11.7 Special headers in forms

A certain entry into the section “Special configuration” can provide all forms with a special header. The keywords

FORMLOGOLEFT:[name of graphical resource] resp.
 FORMLOGORIGHT:[name of graphical resource]

can be used to create forms with these headers. The specified headers will be shown to the left (resp. to the right) of the document’s headline.

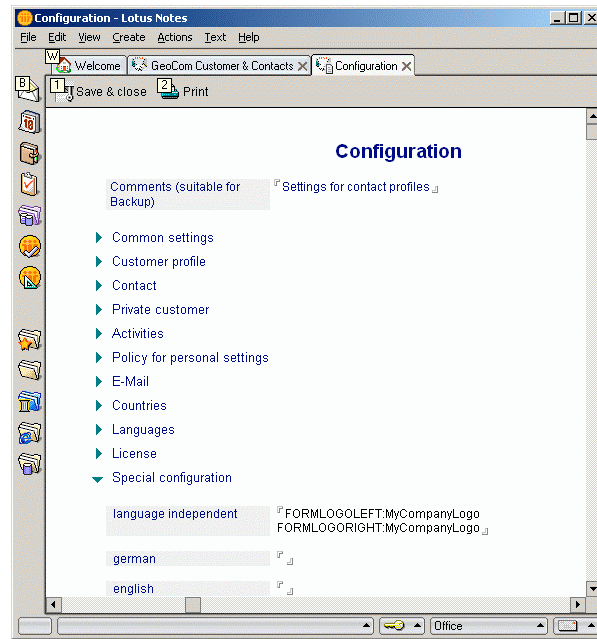


Illustration: Configuration of special header

Be aware that the graphics used should be formatted to 50x50 pixels, because otherwise they will not be shown properly.

11.8 Backup functions of the global configuration

Each time upon saving the global configuration document a copy of it will be stored into the view “Maintenance... c. configurations (backup)”.

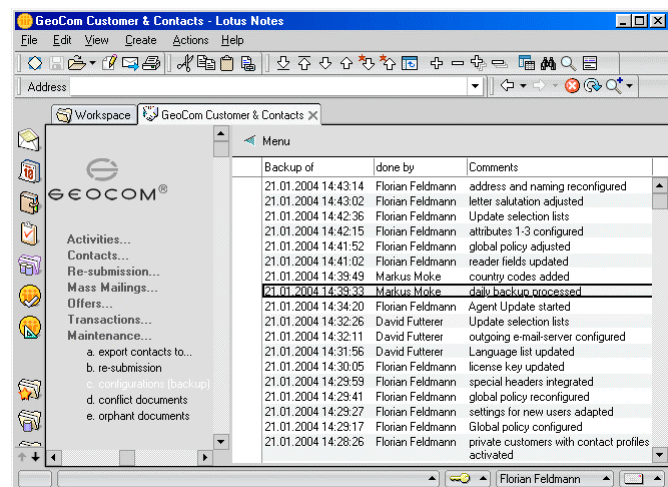


Illustration: View “Maintenance... c. configurations (backup)”

In the first line of the global configuration document there is a field

“Comments (suitable for Backup)” into which you can enter the changes you have done before saving the document. This comment will be shown in the backup view (together with the backup date and the editor) and can be used later to identify a certain backup.

To restore a backup copy to the configuration, open the corresponding backup document and select the action “Restore configuration” from menu.

A warning message will appear. Upon confirming this message the current configuration will be replaced by the values from the backup.

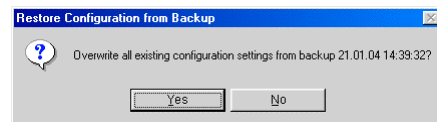


Illustration: Restore configuration backup

11.9 Global policy for personal settings

The section “Policy for personal settings“ lets you specify which settings should not be edited by the user himself. Thus certain (normally personal) parameters can be uniformly defined.

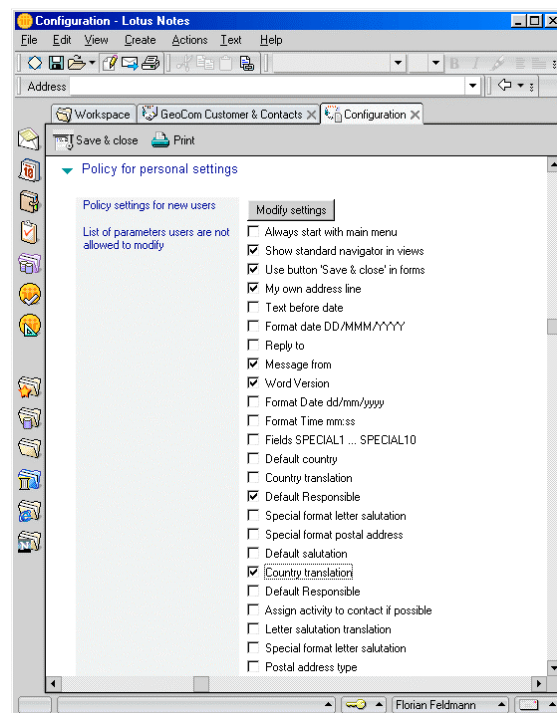
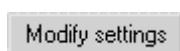


Illustration: Selection of centrally administrated settings

Via the selection marks you can specify which parameters should be administered centrally, and via the corresponding button you can define the values these parameters should be set to (these standard values also define the standard configuration for new users).



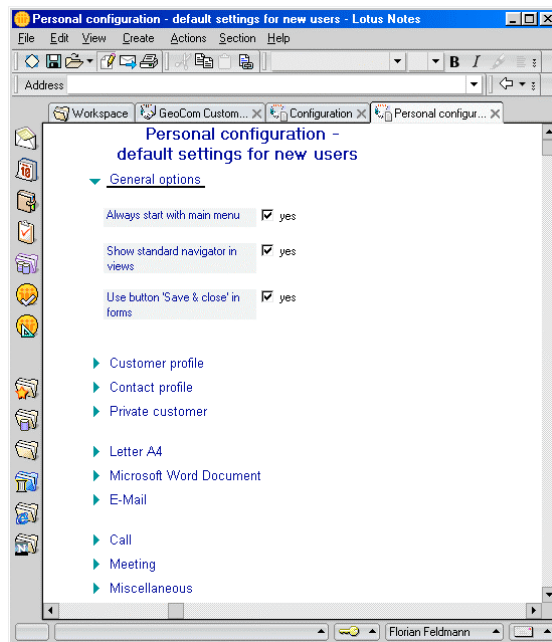


Illustration: Change standard configuration

Upon trying to change a centrally defined parameter, the user will see a corresponding message box.

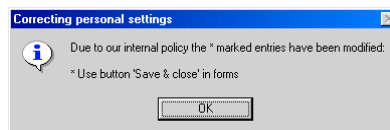


Illustration: Dialog policy restrictions

12 Changes to actions

With the update of GeoCom® Customer & Contacts 5.1 Build 248 beside the improvements, also some changes to existing actions have been done. These are explained in the following.

12.1 Create customer profile



The button “Customer” does not open the form to create a new customer document any more. Instead a selection is opened, whether to create a customer profile or a private customer. After selecting one of these options, the corresponding form for a new document will open automatically.

Thus, private customer no longer need to be created via the “New document” button.

12.2 Re-assigning contact profiles

Via the action “Selected documents – Re-assign customer” one or more contact profiles can be assigned to another customer profile.

The letter salutation and postal address of these contacts will automatically be updated.

12.3 Warning upon deleting customer

To prevent lost documents (see 4.1, Lost documents), a warning message will appear upon trying to delete a customer profile with assigned contacts and/or activities.

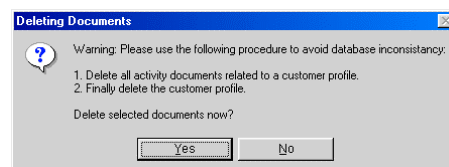
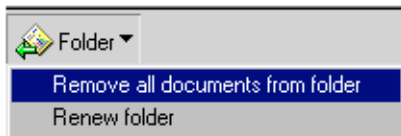


Illustration: Dialog deleting customer with activities

12.4 Search form for contacts

The search form for contacts has been extended by fields like “Language” and “Attribute 3”. Further the options AND / OR / NOT as well as searching for customer profiles AND contact profiles are available.

Illustration: New search form



12.5 New button "folder"

In the view mass mailing "selected contacts" the new button "Folder" is at your disposal. Using the button you can either renew the content of the folder or delete it.

12.6 Warning upon sending mass mailing to contcats without e-mail-address and Fax-number

Trying to send a mass mailing to contacts without valid e-mail-address and Fax-number will now result in a corresponding warning message.

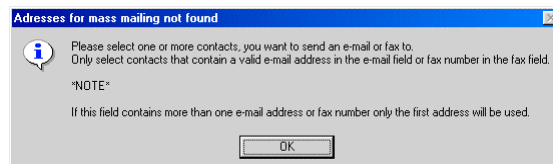
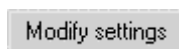


Illustration: Warning on sending mails without e-mail-address

12.7 Modify standard configuration



The standard configuration for new users will be done by the corresponding button in section "Policy for personal settings" within the global configuration document (see also 11.9 Global policy for personal settings).

12.8 Icons

The new action "Icons" will open a legend containing buttons and icons used in GeoCom® Customer & Contacts. Only those icons are explained which are not explained within the application itself.


















icon	function
	Twisty for opening views
	Customer profile documents
	Project profile documents
	Contact profile documents
	Incoming and outgoing call documents
	Miscellaneous
	Meeting documents
	Outgoing correspondence, DIN A-4
	Outgoing correspondence, E-mail
	Outgoing correspondence WinWord-Documents
	Outgoing correspondence
	Incoming mail, letter and fax documents
	Checkmarked for deleting
	"Homepage" (inside of the customer profile document)
	re-submission date was set, "re-submission over due"
	re-submission date was set, "re-submission for future date"
	re-submission date was set, "re-submission on current day"

Illustration: Legend of icons

13 Fix list

The following bugs and program errors have been corrected within GeoCom® Customer & Contacts 5.1 Build 248.

13.1 Incorrect display of week days in view "... by date"

Now the correct week day corresponding to the calendar will be shown.

13.2 Incorrect display of company names with multiple lines

Multi-line company names will now be displayed correctly.

13.3 Instruction .Close on ending mass mailings in Word

This instruction is not used any more.

13.4 Address slips: Personal settings

Personal settings regarding the address format are now also considered on printing address slips.

13.5 Template selection for mass mailings: Analogous to outgoing

Template selection for mass mailings is now done in the same way as with template selection for outgoing documents.

13.6 Display of company name upon alarms from re-submission

Alarms regarding re-submission of a document will now also show the company name in addition to the document-ID.

13.7 Automatic recalculation upon changes within customer profiles

Letter salutation and postal address in customer profiles will now be updated immediately upon changing the profile (not on saving the document).