

SO CRM Analysis



Table of Contents

Introduction to SO CRM Analysis	4
Installation	6
Installation Overview	6
System Requirements	7
Install the Kontineo 2006 Software Platform	8
Activate License	9
Kontineo 2006 Platform Basic Configuration	11
Download SO CRM Analysis and Import it into Kontineo 2006	14
Configuration of the SO CRM Analysis solution	16
Client Deployment	20
How to produce a SO CRM Analysis	21

Introduction to SO CRM Analysis

SuperOffice CRM Analysis is configured to deliver a usage analysis by user group, a content report and as supplementary analysis of category top 10 and duplicates. The configuration is vital in getting high business benefit of SuperOffice.



SO CRM Analysis is designed as a tool specifically for SuperOffice CRM.

CRM Usage analysis by user group.

A Word document is produced for each user group, with analysis of all the individual users in each group.

It includes an analysis of usage in the categories:

- Activities
- Documents (Excluding emails)
- Emails
- Sales

Use it:

- to evaluate for the individual user to what extent they use SuperOffice in the areas covered (Quantity of data input). The purpose is mainly to identify whether there should be targeted education efforts.
- to evaluate the quality of usage. The areas covered are the number of overdue incomplete activities and the number of overdue open sales-forecasts.

CRM Contents analysis

The primary analysis is an in-depth analysis of customer categorization compared to activity level.

The analysis lists all categories and displays how many customers in each category where the activity level over the last year has been High, Medium, Low - or absent.

Use it to identify on which categories resources are spent - and if there are important neglected customers.

In case of findings that need further investigation, the report can be delivered as an operational tool with customer drill down.

Supplementary analysis

- Category TOP 10 analysis
- Duplicate quality indication (suspected duplicate analysis on three different criteria)
- Usage analysis of all types of activities and document templates in a given period (No. of created activities in the period for each type).
- Usage analysis of all company and person interests (Number of companies/persons for each

interest)

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Installation

Installation Overview

To install the Excel LCD solution, follow the below:

1. Make sure the [system requirements](#) are met before you start
2. Install the Kontineo 2006 Software Platform on a Windows Client
3. Activate License
4. Kontineo 2006 Platform Basic Configuration
5. Download Excel LCD and Import it into Kontineo 2006
6. Configuration of the Excel LCD solution
7. Client Deployment

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System Requirements

Client PC

SO CRM Analysis is designed to be run on a Client PC. Nothing has to be installed on a server.

SuperOffice CRM (the Host System) is required installed as a Windows Client on Client PCs where SO CRM Analysis will be used.

Microsoft Office is also required installed on the Client PC.

Hardware and Software specifications of the Windows Client should as a minimum meet the requirements of SuperOffice CRM and Microsoft Office.

SuperOffice CRM as Host System

SO CRM Analysis is designed only for SuperOffice CRM.

SuperOffice CRM version 5.6 and up to version 6.1.2.70 are supported. Version 6.2 is at current time of writing in testing, with expected release Q1 2009.

Only SuperOffice Windows Clients are supported.

Full compatibility and functionality requires that SuperOffice CRM runs on Microsoft SQL Server 2000 or later.

SO CRM Analysis is not designed to be used on Travel.

Microsoft Office

SO CRM Analysis require Microsoft Office to produce documentation Word, and List editing in Excel.

Microsoft Office version 2003 and 2007 are both supported.

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Install the Kontineo 2006 Software Platform

Download the Kontineo 2006 Software Platform installation file from: www.kontineo.com/download

Run the installation on a Host System Windows Client or server.

Follow the on-screen instructions (default settings are recommended).



Note: On Windows server 2003 you will get the error "The procedure point sstrcatI could not be loacted in the Dynamic Link Library MSDART.DLL." This is a known issue that should be ignored, as it does not inflict any consequences.



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Activate License

How to order a Kontineo 2006 license letter or license file.

To order a Kontineo 2006 license you have to contact a KONTINEO Partner or Kontineo for pricing information and License ordering.

To be sure we issue the Licenses Letter with the correct information, please confirm back to us, that the information about the customer is correct - or please make the appropriate corrections.

If a License has an Expiration Date or DEMO stated in the License letter, it is a temporary License.

As soon as we register payment for the License, a new permanent License will be issued.

How to activate it:

Select WEB activation in the screen that appears when you start Kontineo 2006 the first time, and accept License terms.

Click next will load an issued license, or a 30 days trial license will be issued.

If WEB activation fails, it may be due to Firewall blocking. In that case, select manual or file activation.



If it is the first time Kontineo 2006 is ran up against the SuperOffice CRM installation, Kontineo 2006 will prompt for License Activation.

Also, if you have downloaded and activated an unlicensed Solution, due to expired licenses, and under various other circumstances, you will be prompted with the License Activation Screen.

Using the WEB License Activation option, Kontineo 2006 automatically registers a 30 Days Trial License for Kontineo 2006 or for Solutions. If a License has once been activated as a 30 days trial, only Kontineo A/S can reactivate it.

If Kontineo 2006 has previously been installed, the License Activation screen may appear if a License has expired, or for other reasons that will be stated.

If a new license key has been issued by Kontineo A/S, WEB Activation will read it over the WEB Service and save it in it's host systems central database.

If Firewall settings or some other reasons causes that Kontineo 2006 cannot communicate over the internet with the Kontineo License WEB Server, you will need to contact Kontineo A/S to generate and send a License Key.

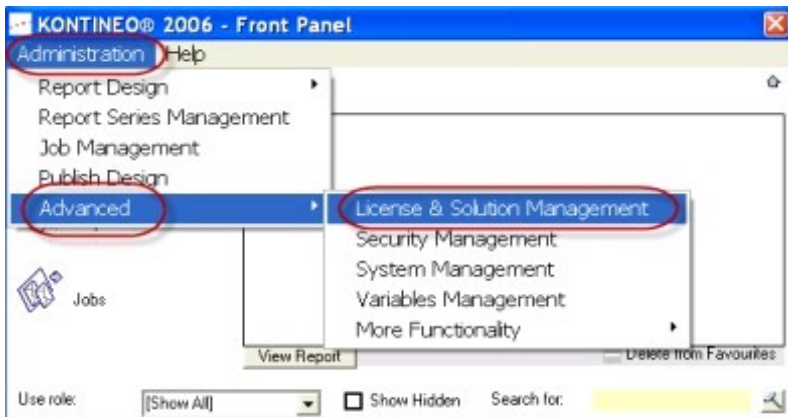
For further information on this subject, see the Kontineo 2006 Product Page at www.kontineo.com.

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Kontineo 2006 Platform Basic Configuration

User License and Administrator Rights configuration

In Administration -> Advanced -> License and Solution Management



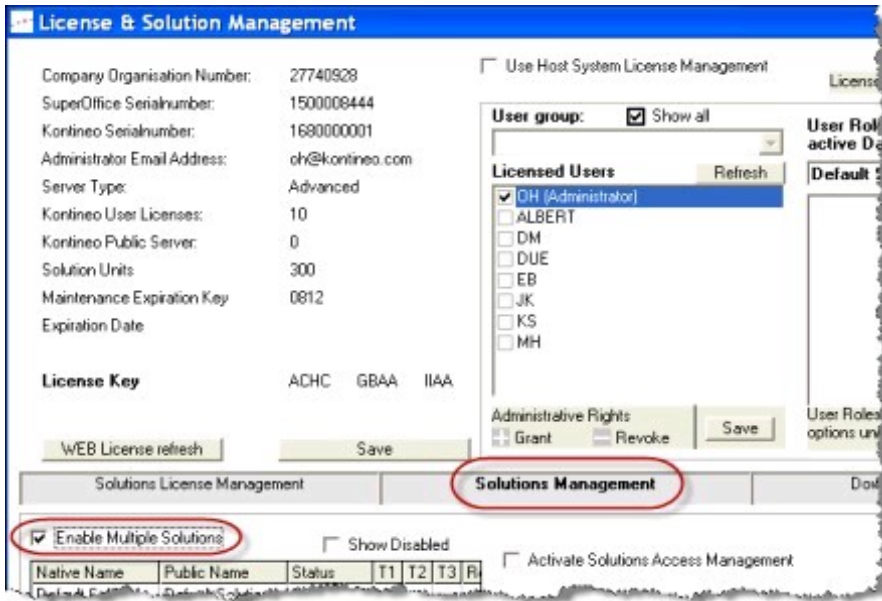
- Select if you want to use Host System License Management. It means that Kontineo 2006 will use groups directly imported from the Host system, instead of user licensing. This may be an advantage if you have many users created in your host system. A host system could be SuperOffice or Kontineo Frontier
- Set User Licenses and Administrator Users. For example, you can give the group "CRMmatrix Users" user privileges, and the group "Kontineo Administrators" Administrator rights. Please remember to press "Save"!

Use Host System License Management

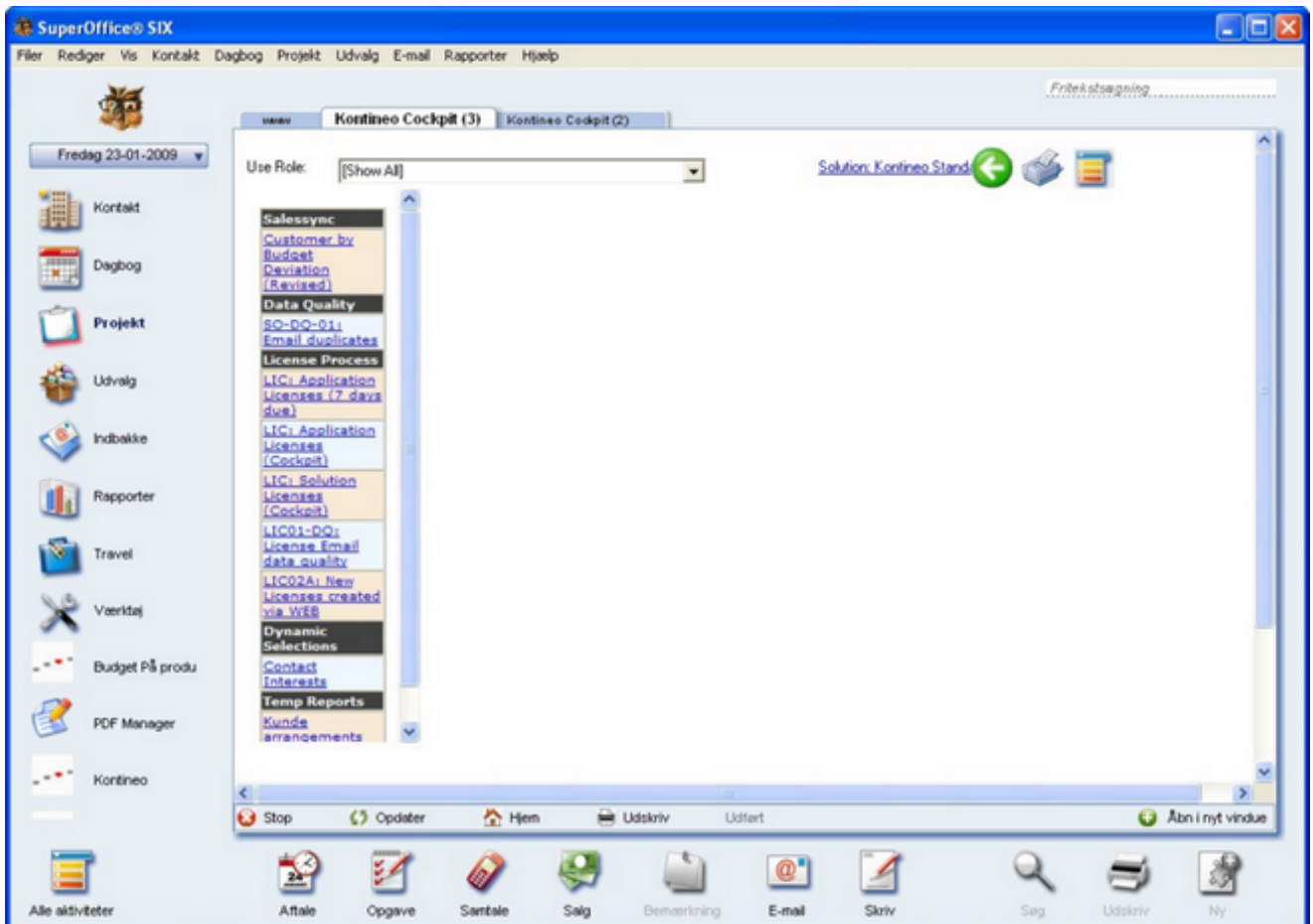
Licenses in use: 6 of 10

Grant User license to users in groups: <ul style="list-style-type: none"><input type="checkbox"/> Administration/Marketing<input checked="" type="checkbox"/> CRMmatrix Division Management<input checked="" type="checkbox"/> CRMmatrix Management<input checked="" type="checkbox"/> CRMmatrix Users<input type="checkbox"/> Due<input checked="" type="checkbox"/> Kontineo Administrators	Users in selected Group <ul style="list-style-type: none"><input checked="" type="checkbox"/> OH<input checked="" type="checkbox"/> MH<input checked="" type="checkbox"/> DM<input checked="" type="checkbox"/> HAKDNM
Grant Admin Rights to users in groups: <ul style="list-style-type: none"><input type="checkbox"/> CRMmatrix Management<input type="checkbox"/> CRMmatrix Users<input type="checkbox"/> Due<input checked="" type="checkbox"/> Kontineo Administrators<input type="checkbox"/> Norway	Users in selected Group <ul style="list-style-type: none"><input checked="" type="checkbox"/> OH<input checked="" type="checkbox"/> ALBERT<input checked="" type="checkbox"/> MH<input checked="" type="checkbox"/> DM<input checked="" type="checkbox"/> HAKDNM

- Enable Multiple Solutions. This gives you the opportunity to use more than one solution.



WEB Panel and Buttons Configuration



WEB Panels are Kontineo Cockpit Tabs or WEB Panel tabs at the contact card, etc. SuperOffice and Frontier standard functionality supports integrating external applications in the user interface. Kontineo 2006 provide easy start-up configuration functionality. Use the SuperOffice/Frontier administration functionality for further configuration.

To initially Create WEB Panels and Buttons in SuperOffice, use the "Create SuperOffice WEB Panels" functionality under Administration -> Advanced -> More functionality in Kontineo

2006, then use the SuperOffice Admin client for further configuration.

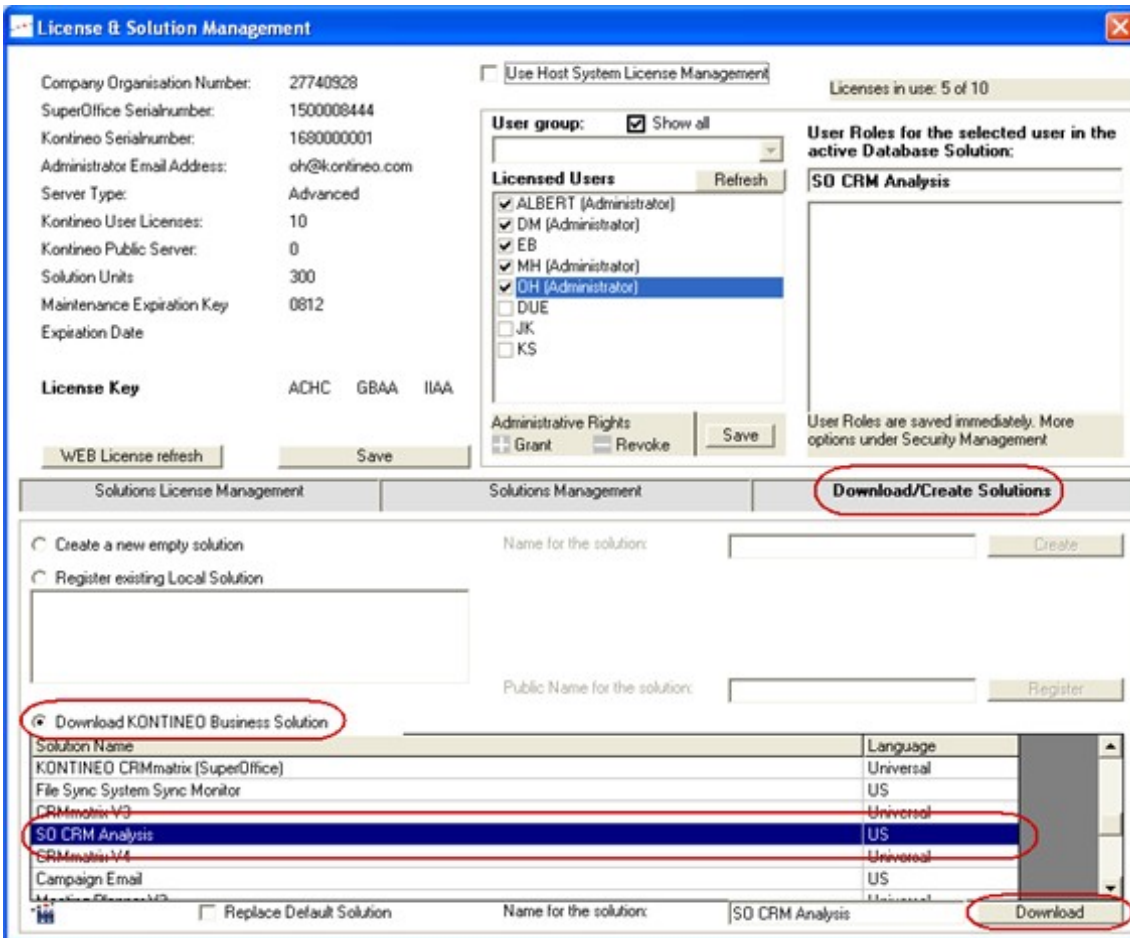
This information may be outdated. please refer to the Kontineo 2006 help file by following [this link](#), to get the latest configuration instructions.

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Download SO CRM Analysis and Import it into Kontineo 2006

You are using Kontineo 2006 to Download the SO CRM Analysis and Import it into the platform as a solution.

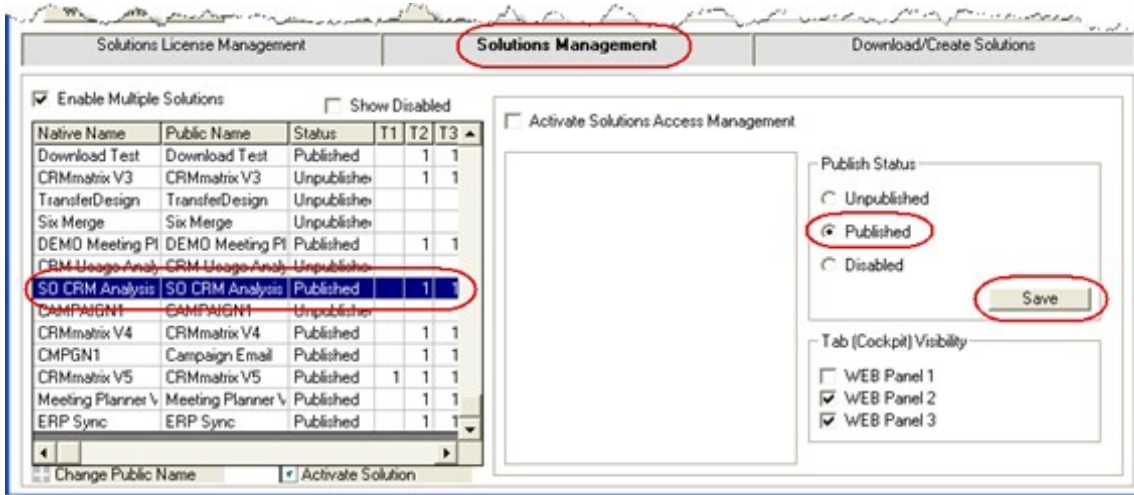
- Start Kontineo 2006
- Goto Menu: Administration -> Advanced -> License and Solution Management
- Click the "Download/Create Solutions" tab
- Select the "Download KONTINEO Business Solution" Option
- Select the "SO CRM Analysis" solution in the list, and click the "Download" Button



After clicking download, Kontineo 2006 will download the solution and then it will check if a license exists in your SuperOffice database, or not. If not, it will ask you to Activate a License for the SO CRM Analysis Solution. WEB activation will automatically generate a 30 Days Trial License for the solution. See also Activate License.

Then Kontineo 2006 will reset the SO CRM Analysis solution to your system's environment.

- Click the "Solution Management" tab
- Select SO CRM Analysis in the List
- Set it to Published and click Save



- Click the "X" to Close License and Solutions Management



You will now have SO CRM Analysis as a published solution in the Frontpanel "Change Solution" menu.'



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Configuration of the SO CRM Analysis solution

As it is the case with most licensed solutions running on the Kontineo 2006 Software Platform, the Excel LCD solution is configured primarily using Global Variables.

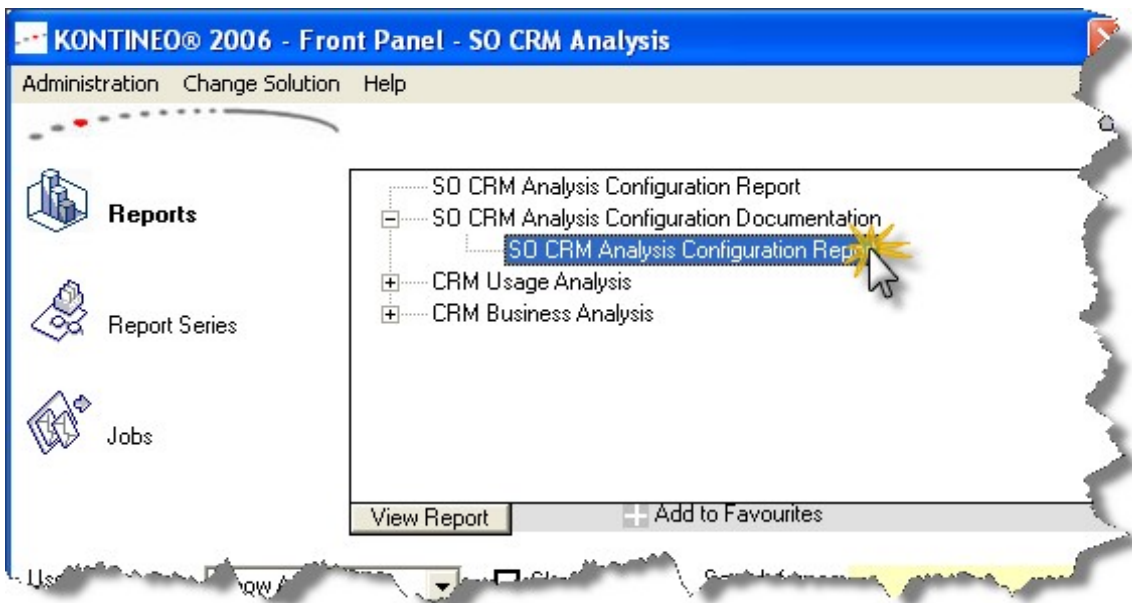
The best practice approach to configure Kontineo 2006 solutions is:

1. Print the Variables Documentation Report
2. Parse the report to Word and write the specification in Word (Highlighted)
3. Change the Variables in the Solution
4. Print a new configuration report and verify that all values have been changed as specified
5. Publish the Solution Design

SO CRM Analysis Configuration Documentation

The SO CRM Analysis Solution comes as standard with the report "SO CRM Analysis Configuration report" which documents Variables configuration, as well as it can be used for Customization Documentation.

- In Kontineo 2006 Frontpanel, be sure, that the SO CRM Analysis solution is selected, then select Reports in the left Navigation Bar.
- Click the Plus to Expand the "SO CRM Analysis Configuration Documentation" group of reports.
- There is only one report. Double-click the "SO CRM Analysis Configuration Report".



- Make sure the only active criteria is "Advanced level = 1. Simple"
- Click the "To Word" button to parse the documentation report to a printable and editable Word Document.

SO CRM Analysis Configuration Report

Options Functions Layout Advanced Refresh Related Reports Add Task

Group	Advanced level	Code	Variable name	Explanation	Default Variable Value	Variable Value
00 SO CRM Analysis Doc	1: Simple	00A	CRM Analysis intro	Documentation Variable	A part of the Contents a	A part of the Contents z
00 SO CRM Analysis Doc	1: Simple	00B	CRM Analysis intro	Documentation Variable	The variables A01D1 sp	The variables A01D1 sj
00 SO CRM Analysis Doc	1: Simple	00C	CRM Analysis intro	Documentation Variable	In Variable B01 you can	In Variable B01 you car
A SO CRM ANALYSIS \1	1: Simple	A01A	ACTIVITY_HIGHL	The Border between Me	8	8
A SO CRM ANALYSIS \1	1: Simple	A01B	ACTIVITY_MEDIU	The Border between Me	4	4
A SO CRM ANALYSIS \1	1: Simple	A01C	ACTIVITY_DAYS	How many days back ai	-365	-365
A SO CRM ANALYSIS \1	1: Simple	A01D1	EMAILDEFINITION	This variable is one of	e-mail	e-mail
A SO CRM ANALYSIS \1	1: Simple	A01D2	EMAILDEFINITION	See variable A01D1: EN	email	email
A SO CRM ANALYSIS \1	1: Simple	A01D3	EMAILDEFINITION	See variable A01D1: EN	e-post	e-post
A SO CRM ANALYSIS \1	1: Simple	A01D4	EMAILDEFINITION	See variable A01D1: EN	epost	epost
A SO CRM ANALYSIS \1	1: Simple	A02A	CRMANALYSIS_D	The Duplicate Analysis	10	10
A SO CRM ANALYSIS \1	1: Simple	B01	CRMANALYSIS_D	The folder in which th	C:\Kontineo\CRM Anal	C:\Kontineo\CRM Anal
A SO CRM ANALYSIS \2	2: Moderate	B02	CRMANALYSIS_A	The Job "B Usage and		
System - E-mail	2: Moderate	x	GLOBALSMTPPAS	This variable default in		
System - E-mail	2: Moderate	x	GLOBALSMTPUS	This variable default in		
System - Import	1: Simple	x	SKIPLOG	This Variable is default	0	0

Criteria Auto Refresh Max Rows: 0

Criteria	Current Criteria
Advanced Level	IN
	1: Simple, 2: Moderate

Note: You can edit criteria and add various criteria, depending on the purpose of the documentation.

Group: A SO CRM ANALYSIS VAR
Advanced levels: 1: Simple

A01A: ACTIVITY_HIGHLOWERLIMIT
Marked Custom: (Value = Default)

A01B: ACTIVITY_MEDIUMLOWERLIMIT

The SO CRM Analysis Documentation Report is a printable Word Document displaying

- 1 - Code and Name of a Variable
- 2 - Explanation to the Variable
- 3 - The current value of the Variable.

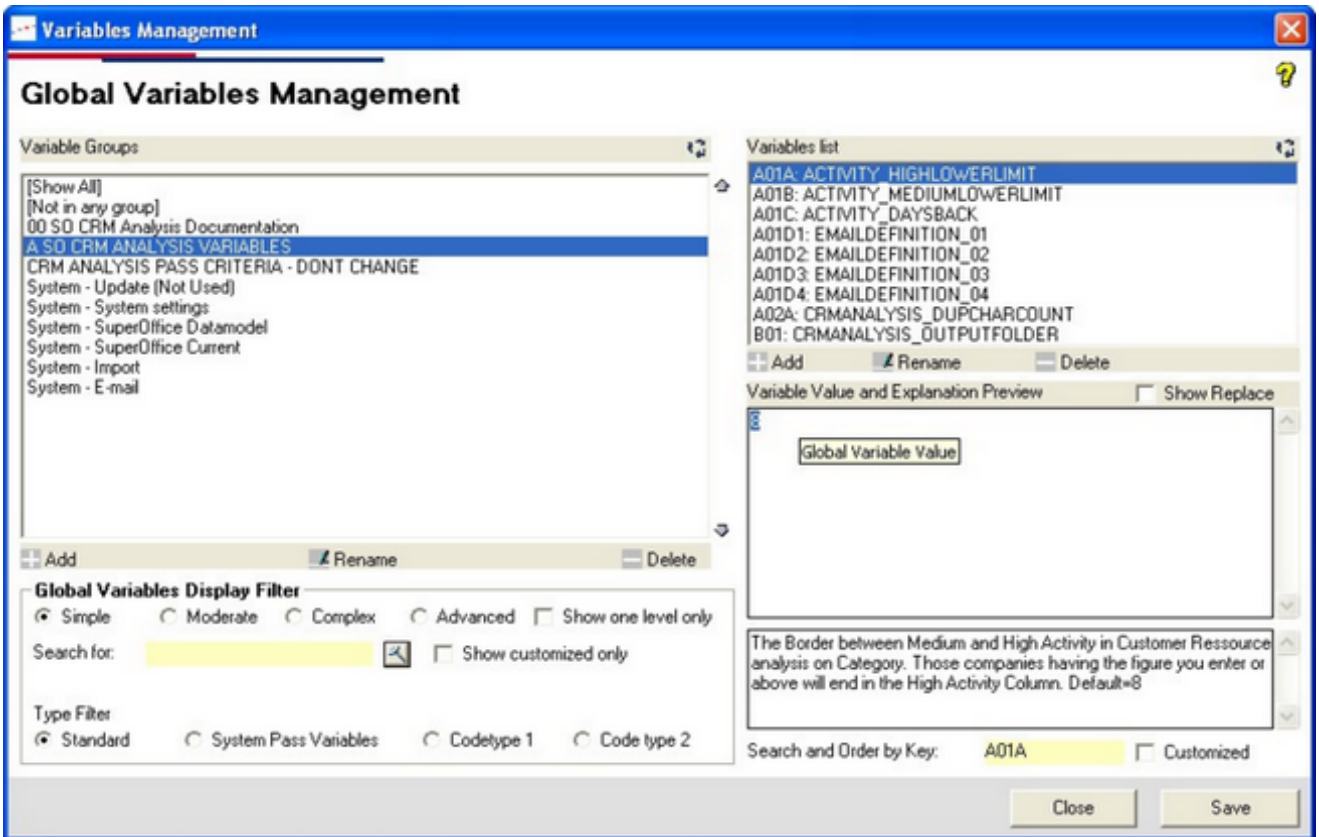
To manage customization, it further highlights if variables values are different from default, and if the variable is marked as Custom.

- Print the Word document
- consider which variables you want to change.

SO CRM Analysis Variables Configuration

With the printed report with highlighted changes, the next step is to apply the specification to the solution. In this case that means to change variable values.

- Goto Menu: Administration -> Advanced -> Variables Management
1. Set the Display Filter to Simple
 2. Select the "A SO CRM Analysis Variables" Group
 3. Select the desired Variable in the Variables List
 4. Change the Variable Value in the Variable Value field
 5. REMEMBER to click save



- Change the Next Variable - when finished click Close.

Note: You can double click a Variable for further options, you can click the yellow questionmark to open the Kontineo 2006 Code assistant. For more help on variables management in Kontineo 2006, see the Kontineo 2006 product page at www.kontineo.com.

Having finished Variables Configuration, it is best quality control practise to Print a new copy of the Variables Configuration Report and verify that all changes have been applied as specified.

Publish Solution Design

When a solution is published it has two primary purposes:

- Client distribution: Other clients will load the solution with the configuration you have defined
- Backup: A copy is saved in the central SuperOffice template folder, which is usually included in existing back-ups

- Goto Menu: Administration -> Publish Design
- Answer "Yes" when prompted "Do you want to publish your solution to all users?"
- Wait a few seconds - and Click OK when it confirms "Publish Completed"



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Client Deployment

The SO CRM Analysis is usually not a solution that you would distribute to many users, but if having published the solution, all it takes to do to distribute the solution to another client PC, is to Install Kontineo 2006 on that client, and then start Kontineo 2006.

It is also possible to distribute Kontineo 2006 and solutions using SuperOffice soloader technology, but that would not be relevant for the SO CRM Analysis solution.

For more information about this subject, see the Kontineo 2006 Product Page at www.kontineo.com.

-0-

How to produce a SO CRM Analysis

Index

