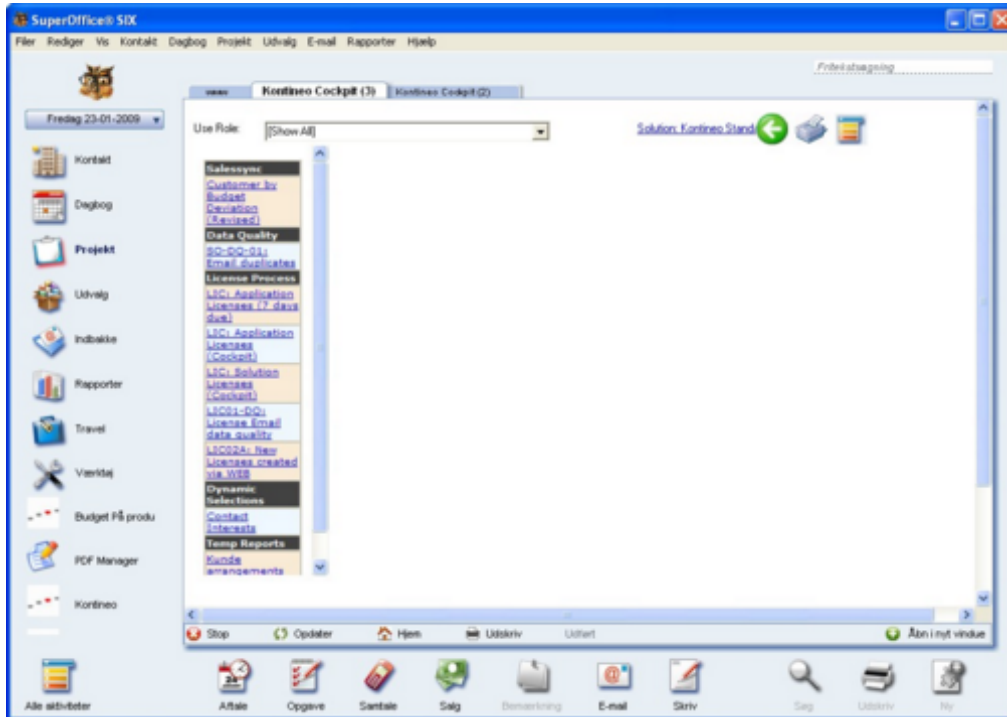


# Demo setup



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## Demo Setup in SuperOffice Environment

### Installation overview

1. Check if your computer meets the [prerequisites](#).
2. [Download](#) all of the required software.
3. [Setup](#) the SuperOffice database.
4. [Install](#) SuperOffice.
5. [Install](#) Kontineo 2006
6. [Install](#) The Matrix Company Demo Database.
7. If you want, you can [setup multiple databases/SuperOffice](#) installations on the same computer.

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## Prerequisites

The prerequisites for setting up a KONTINEO 2006 setup are:

- \* You must have one of the following databases
  - o Microsoft SQL Server 2000 including SQL Server Management Studio
  - o Microsoft Database Engine (MSDE) including a tool to manage databases and security
  - o Microsoft SQL Server 2005 including SQL Server Management Studio
  - o Microsoft SQL Server Express including SQL Server Management Express
- \* Windows XP, Windows Server 2003 or Windows Vista
- \* Your server/client needs to meet the minimum requirements of running SuperOffice.
- \* SuperOffice version 6.0 SR 3 or newer (the provided demo database is created with SuperOffice 6.1.270)
- \* KONTINEO 2006 SR6
- \* Office 2003 is preferred (Office 2007 is also supported)

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## Software Downloads

SQL Server and Management express or MSDE

You need either Microsoft SQL Server 2000 or SQL Server 2005 in a full server version or runtime version.

SQL Server Express is a free version of SQL Server 2005 and it comes with a SQL Server Management Express; a configuration and management tool. Download the server [here](#), and the Management express software [here](#).

MSDE is a substitute for SQL Server Enterprise Manager. (We recommend MSDE Manager from Vale Software, because it has more advanced options available, than the SQL Server management express got. It can be [downloaded](#) as a 7 days trial and at current time of writing it is priced at \$80).

SuperOffice CRM

Version 6.1.270 is preferred (and at current time of writing required to use "The Matrix Company" Demo database).

Contact the local SuperOffice subsidiary to get a link to download the [SuperOffice installation CDs](#).

Microsoft .NET Framework 2.0

The SuperOffice CRM 6.1.270 installation program fails if the .NET 2.0 framework is not installed.

At current time of writing, the .NET Framework 2.0 redistributable package can be downloaded from this link to [Microsoft Download Center](#)

The Kontineo 2006 Software Platform

You can download the latest version of the Kontineo 2006 software platform from [www.kontineo.com/download](http://www.kontineo.com/download)

Microsoft Office

Microsoft Office software should be obtained through the appropriate channels.

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## Setup of the database

When you have installed the database system, refer to the [SuperOffice TechDoc](#) site for setting up a database for SuperOffice on the different versions of SQL Server.

Use THEMATRIXCOMPANY for the name of the database and the ODBC entry, instead of SuperOffice. This is to keep track of databases when using more than one SuperOffice installation.



Before you start the installation, you should have registered the SQL server in a SQL Server Group, and in Server Properties under security, you should have set the Authentication Mode to both SQL Server and Microsoft Windows NT.

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## Installation of SuperOffice

Follow these quick install guidelines for installing a SuperOffice Server. For further, more detailed information, see [www.superoffice.com/techdoc](http://www.superoffice.com/techdoc)

1 Start Setup.exe from the SuperOffice CD and click Install the SuperOffice Six Server. Select New installation and use the following values:

- \* Program Folder: C:\Program Files\SuperOffice
- \* Document archive: C:\SO\_ARC
- \* Word processor/E-mail client: use the relevant value
- \* ODBC Data Source: THEMATRIXCOMPANY with the CRM5 user to log on

2 To register the database use the following details

- \* License Serial number: 1010000006
- \* Company name: The Matrix Company
- \* Home Country: Denmark
- \* First name: John
- \* Last name: Amarello
- \* User ID: JOHN
- \* Password: [BLANK]

**REGISTER NEW DATABASE**

Before you can start using the new SuperOffice database you need to register it. You do this by using this dialog to enter initial data about your company and the first user (with administrative rights).

**Licence owner**

Licence serial number: **1010000006**

Company name: **The Matrix Company**

Home country: **Denmark**

**Administrator user**

First name: John Last name: Amarello

Login ID: **JOHN**

Password: ..... Verify password: .....

**OK** **Cancel**

You now have a working demo environment on your computer. A shortcut to SuperOffice is created on your desktop and more shortcuts are installed in the Start menu group called SuperOffice.



You can also perform a client setup on a different computer. Follow the steps on this page to install SuperOffice on a client computer.



## Installation overview of Kontineo 2006

To install Kontineo 2006 in your Demo environment, follow these steps:

1. Make sure the [system requirements](#) are met
2. Download and [install Kontineo 2006](#) on the Host System server - which is your demo machine
3. [Activate License](#)
4. Perform Kontineo 2006 Platform [Basic Configuration](#)

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# Install Kontineo 2006

Download the Kontineo 2006 Software Platform installation file from: [www.kontineo.com/download](http://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 strstrcatI could not be located 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.

**!!!!** It is not necessary to buy a license, in order to run the demo environment.

## 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.

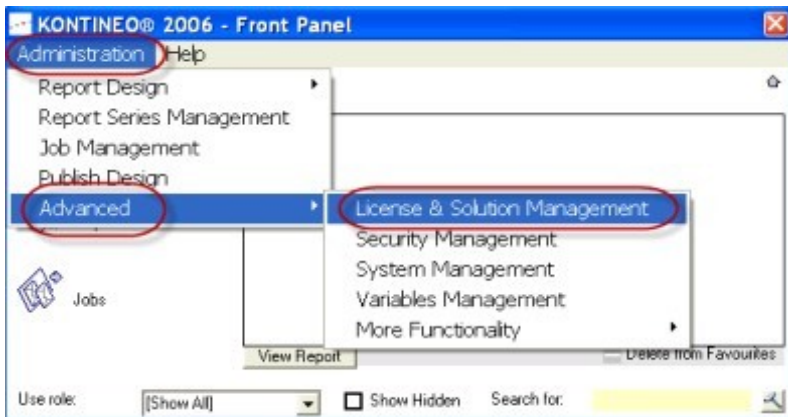


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## Basic configuration

### 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"!

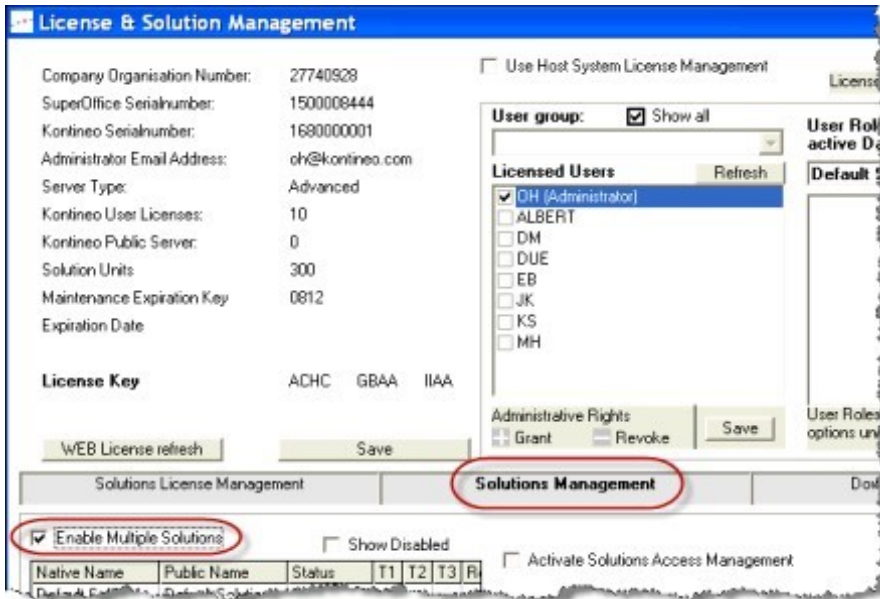
Use Host System License Management

Licenses in use: 6 of 10

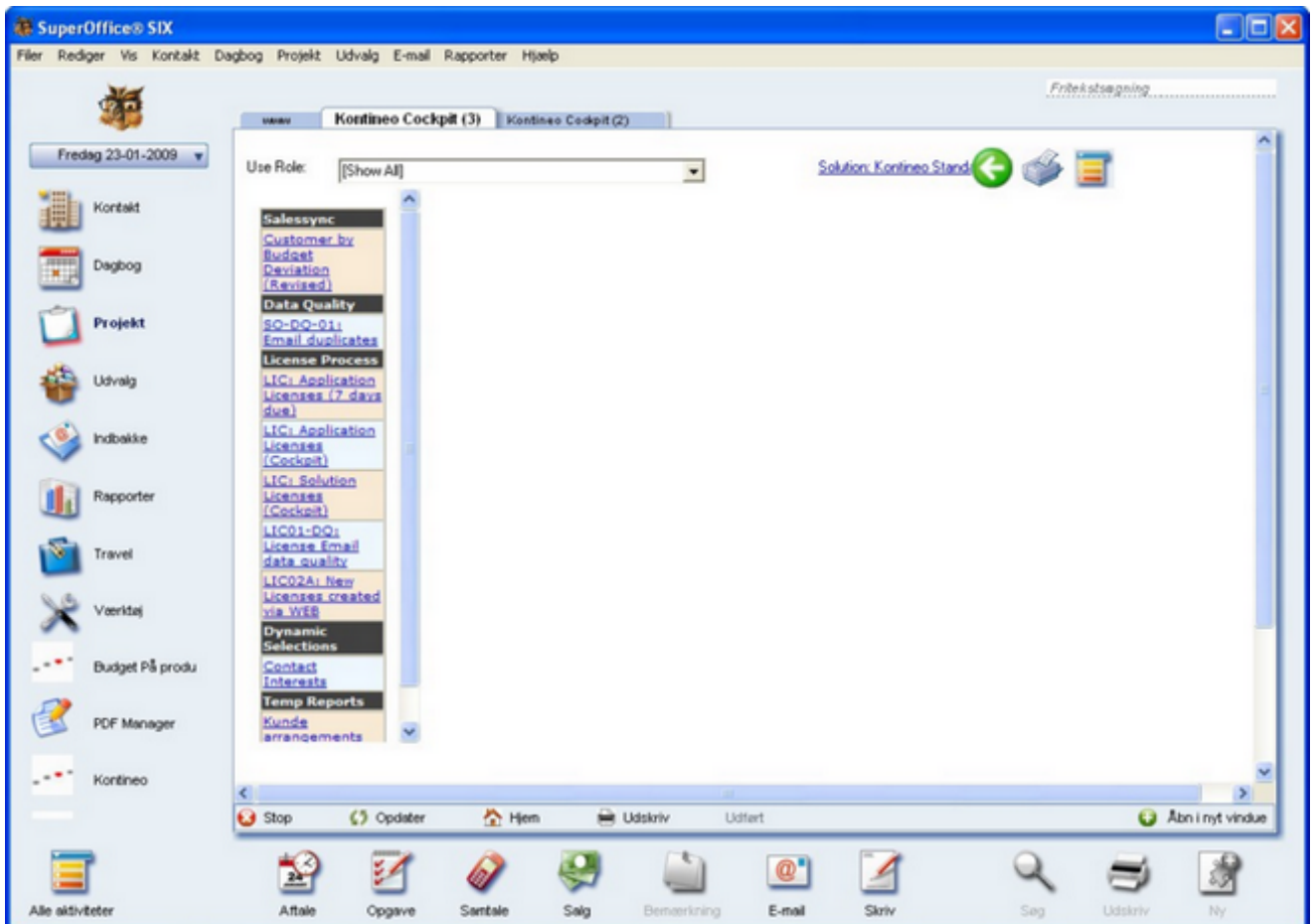
<p>Grant User license to users in groups:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Administration/Marketing</li><li><input checked="" type="checkbox"/> CRMmatrix Division Management</li><li><input checked="" type="checkbox"/> CRMmatrix Management</li><li><input checked="" type="checkbox"/>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

Save

- 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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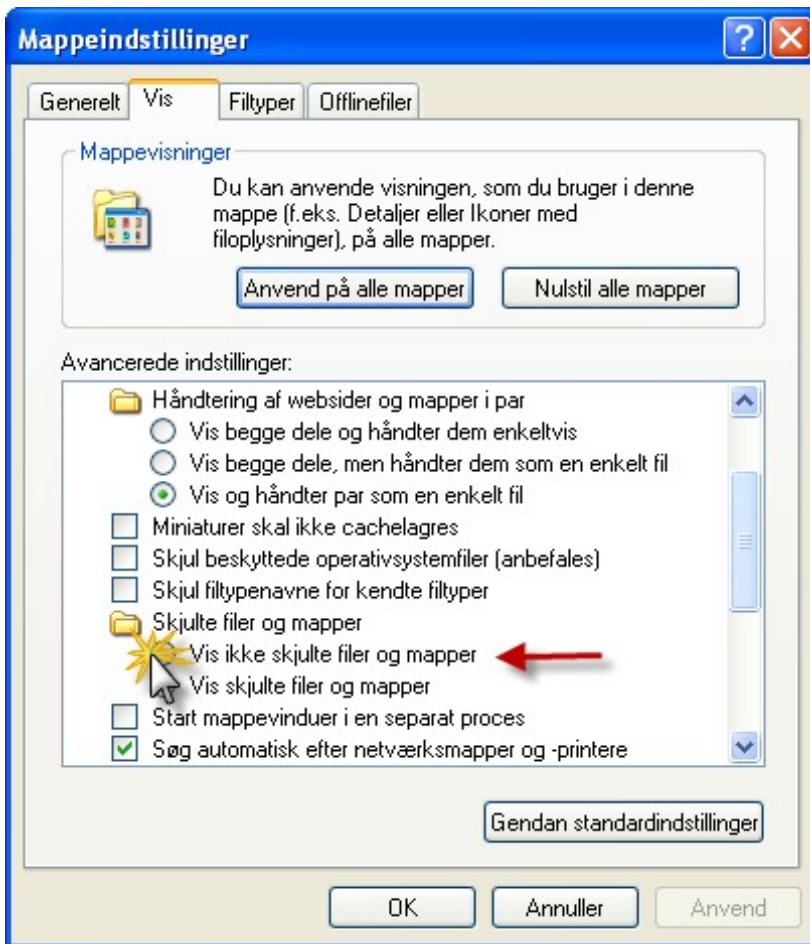
## Install The Matrix Company demo

In the previous chapter, you have installed an empty SuperOffice database. Kontineo has a pre-configured demo database with demo companies, activities, userdefined fields, etc. The instructions below will replace the empty database with this pre-configured database and copies templates that go with the database.

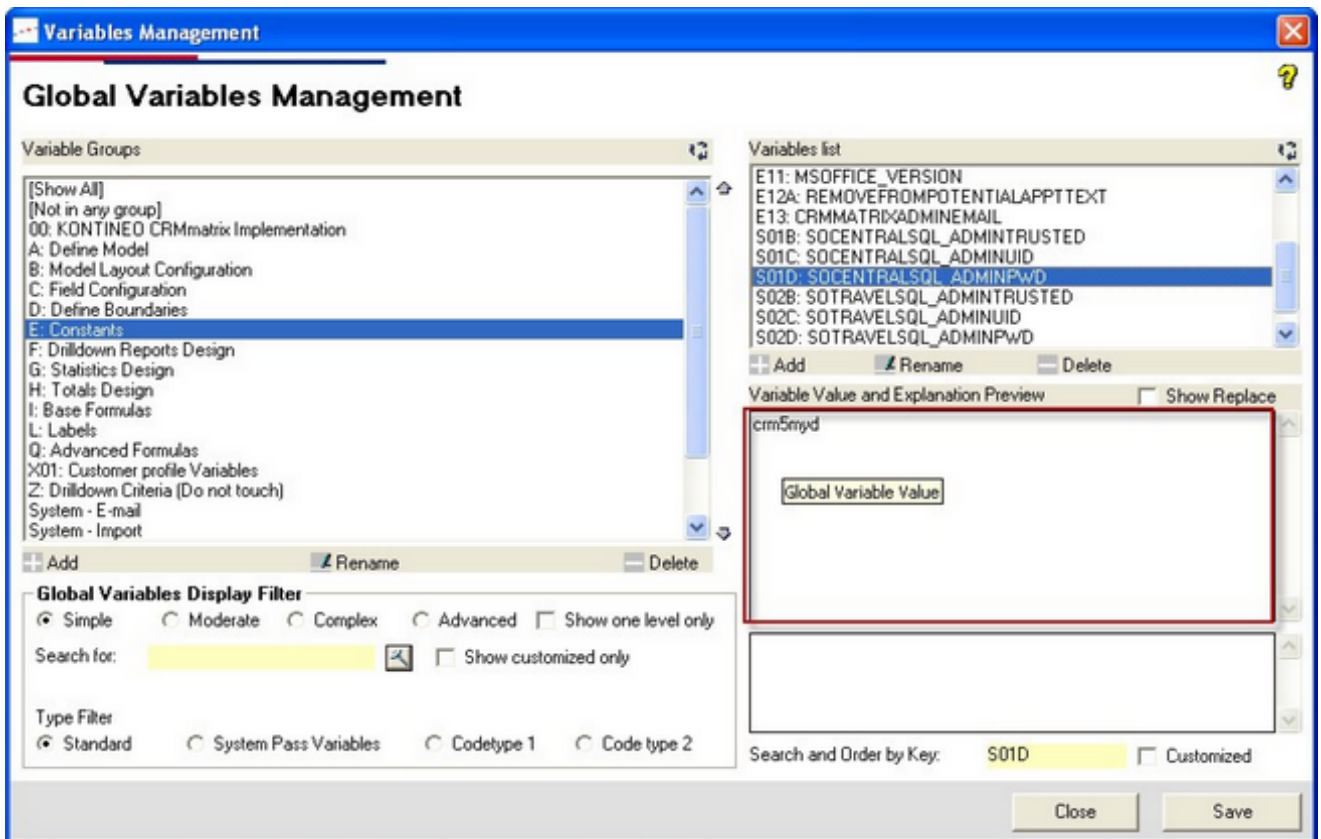
1. Download the demo database [here](#).  
Unzip all the files to C:\temp
2. Run DBSetup.exe from the SuperOffice Program folder and select Import a Database from File.  
Use the following values:  
File: C:\Temp\thetrixcompany\thetrixcompany.sda  
Target database DSN: ODBC:THEMATRIXCOMPANY  
User ID: CRM5  
Password: crm5myd  
Note: make sure that the target DSN is the right DSN.  
Click Start. On the dialog that asks if you really want to overwrite the existing database, click Yes.  
When the import is finished, a message Operation Succeeded will appear.

The screenshot shows the 'SuperOffice CRM Six Database Maintenance' dialog box. It has a blue title bar and a close button in the top right corner. The main area is divided into two panes. The left pane, titled 'Choose operation', contains a list of radio buttons: 'Rebuild an existing 5.5, 5.6, 6.0 or 6.1 database', 'Upgrade from version 6.0 to 6.1 (not from 5.5/5.6)', 'Kill a database (5.5, 5.6, 6.0 or 6.1)', 'Create a new, blank 6.1 database', 'Load or re-load initial data into a 6.1 database', 'Create or re-create freetext index on an existing 6.1 database', 'Export a database to file' (with a text box containing 'C:\Temp\thetrixcompany.sda'), 'Import a database from file' (which is selected), 'Rebuild SAINT counters and statuses', and 'Delete and recreate database users'. The right pane, titled 'Explanation', contains text: 'Import a database (5.5, 5.6, 6.0, 6.1) from a flat file created by the Export function. Any existing database on the target WILL BE DELETED! The resulting database will be in the original version, no upgrade is performed; however, platform conversion (for instance, Oracle 10 -> DB/2) is done as needed. You should use a database user with rights to perform DROP TABLE, CREATE TABLE and user administration commands.' Below the panes are two sections: 'Source database' with fields for DSN, User ID, Password, and Prefix; and 'Target database' with fields for DSN (containing 'ODBC:THEMATRIXCOMPANY'), User ID (containing 'crm5'), Password (containing 'crm5myd'), and Prefix (containing 'CRM5'). At the bottom right are 'Start' and 'Exit' buttons.

3. Copy the contents of folder C:\Temp\template to D:\SuperOff\So\_arc\Template
4. Copy the contents of folder C:\Temp\solutions to ... \Document and settings\[your current windows login name]\Application data\Kontineo\Kontineo 2006  
Note: this folder might be hidden by Windows. Select Windows Explorer > Tools > Folder Options > View > Show Hidden Files And Folders to view hidden content.



5. Start Kontineo 2006 and select Change Solution > CRMmatrix V5. The Front Panel will reload.  
Select Administration > Advanced > Variables Management > E: Constants > S01D: SOCENTRALSQL\_ADMINPWD.  
Set the value to crm5myd.




6. Start The Matrix Company from Connection Manager  
You will now have a SuperOffice database with approx. 500 companies, with activities, sales and some other data.  
Furthermore lists have been adjusted and we already added userdefined fields, buttons, WEB Panels and more.

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## Setup multiple SuperOffice demo's

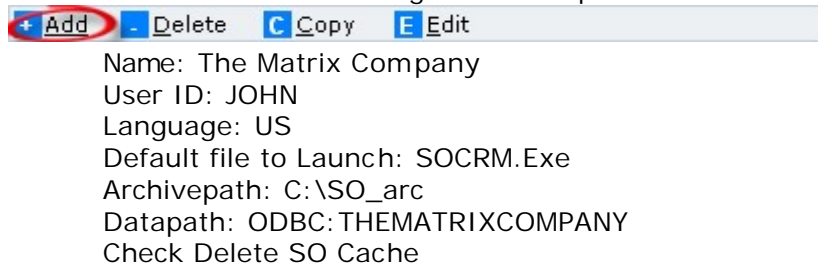
This is quick Best Practice advise for having multiple SuperOffice demos running one one PC, with easy switching between different Demos. It is not fully documented, and should be used as guideline only.

 Please be aware that it is not recommended to have multiple installations of SuperOffice in different versions running on the same PC. It is also required to be a partner of Adwiza APS to download the connection manager.

1 Download Connection Manager for SuperOffice from [www.adwiza.com](http://www.adwiza.com) and save it in the SuperOffice Program Folder. Create a Shortcut to it at your Desktop or in the Quick Launch Bar.

2 Make a backup copy of SuperOffice.ini and name it Copy of SuperOffice.ini

3 Start Connection Manager and setup a New Connection:



4 Save the connection and start The Matrix Company demo by double clicking it.



5 Now you should create a connection to your live installation and add other demo setups.

Please refer to Adwiza for instructions to a more advanced setup.

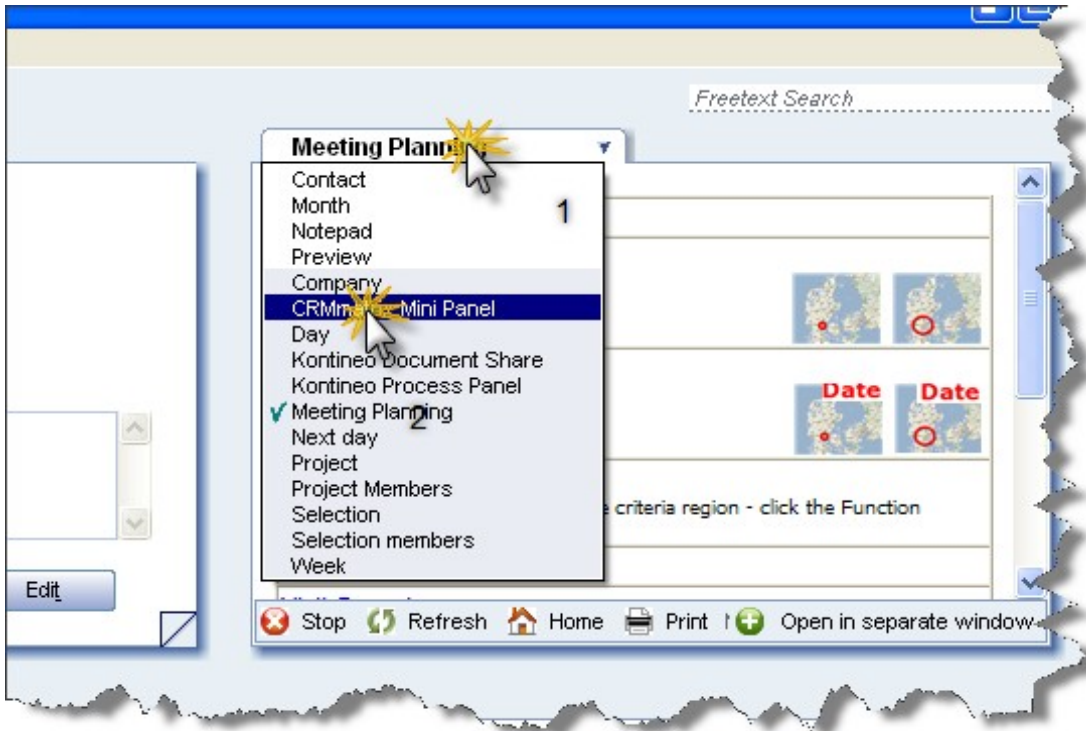
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## How to use the demo environment

The Demo environment is intended to be used as a try-out environment. This means that you can try SuperOffice, Kontineo 2006 CRMmatrix and so forth, for free, like it were a real installation.

You will find a link to the user manual of CRMmatrix in your CRMmatrix minipanel. it is accessed this way:

1. Log in to your demo environment.
2. click your minipanel list
3. select "CRMmatrix Mini Panel"



4. Now the CRMmatrix Mini Panel shows up:

### KONTINEO CRMmatrix® Mini Panel

**How we work with core areas of CRM:**

- **Data Input:** *As little as possible, as easy as possible and with high focus on data quality.*
- **Analysis and Action Planning:** *See where we can make the most money and plan our actions to make it.*
- **Execution:** *Meeting Planning, Customer contact Preparation, sales processes, customer service*
- **Follow up:** *Do we do as planned, can we do better - do we meet our targets.*

**Click Here**

See the [CRMmatrix Guide Powerpoint](#) for an instructions walk through.  
Goto [KONTINEO TrainXpert](#) for training Courses and more.



5. Click the "CRMmatrix Guide Powerpoint"
6. That's it.



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