

# Meeting Planner





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## Introduction to Meeting Planner

Get the most out of the valuable field sales resources. Spend less time on the road, increase the number of customers visited and spend the visits with the customers where visits give the highest pay-off.

If you take a look in the calendar of a field sales representative, you may find meetings to be planned with significant distance between meeting destinations. You may further find that most customer visits could be planned with more focus on high growth potential.

The meeting planner gives the field sales representative the information required to plan meetings geographically efficient with focus on the right customers where and when it is needed



### Nearby customers overview

Having planned one meeting on a day, a very natural question follows: "*Whom are the near-by customers?*"

### Nearby meetings overview

While a customer is on the phone, you need to be able to give a fast reply to a date for a meeting. If you just find an available time in the calendar, the chance of geographically long distance is high. The natural question is: "*When do I have the next meeting near-by the customer?*"

### Meeting planning results

- ▶ **Transportation cost savings**  
Planning meetings geographically gives direct savings on transportation costs.
- ▶ **More customer visits – higher sales**  
Less driving gives room for more customer visits – leading to sales increase.
- ▶ **Customer focus – higher sales**  
Visiting the most important customers leads to higher sales.

The KONTINEO Meeting Planner gives the overview required to answer the questions by one-click exactly where and when you need it.

### Measurable results

Being able to keep track of performance progress gives the opportunity to recognize individual performance and for improved management coaching.

### Individual Details reporting

Printable Visit reports for the individual of past or planned customer visits are significant for the individual as well as it provides valuable overview in tactical sales planning follow-up.

### Data quality in core value data

If data input can be incorrect – it will be! The key to correct data is individual output that rely on quality input. Meeting planning has impact on quality in two core pieces of data: Meetings registration and Customer prioritization. The benefit is evident for the individual sales representative, but it further forms a fundament for accurate valuable management reporting. The ability to answer the question "Do we spend our sales time with the customers

where we can make the most money?" can give reason for initiatives with significant business impact.

#### Driver for CRM Usage motivation

Minimum input effort – maximum output benefit is the key for CRM usage motivation. The output benefit is direct and immediate.

#### Keep it simple

The solution is designed to be easy and simple to use – giving the user what he/she needs with one mouse click – where and when they need it.

For further information about the Meeting planner solution, contact Kontineo or a Kontineo Solutions reseller.

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# Installation

## Installation Overview

To install the Meeting Planner 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 the Meeting Planner and Import it into Kontineo 2006
6. Configuration of the Meeting Planner solution
7. Client Deployment

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## System Requirements

### Client PC

To implement the KONTINEO Meeting Planner, you need to first install the Kontineo 2006 Software, and then download and activate the Meeting Planner solution .

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

Microsoft Office is also required installed on the Client PC.

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

### SuperOffice CRM as Host System

The Meeting Planner 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](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 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.*

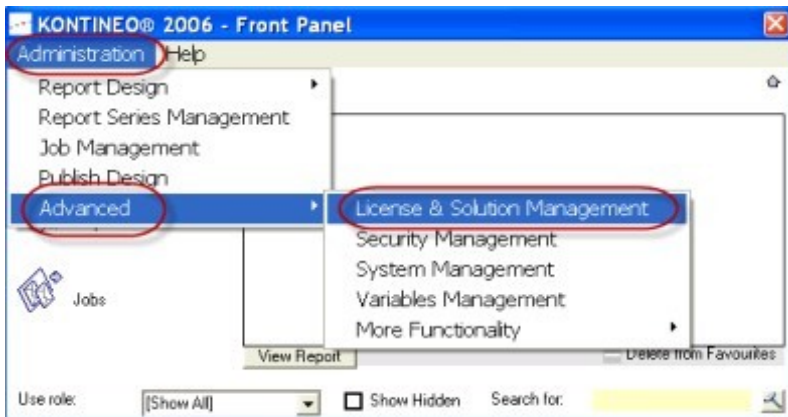
For further information on this subject, see the Kontineo 2006 Product Page at [www.kontineo.com](http://www.kontineo.com).

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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

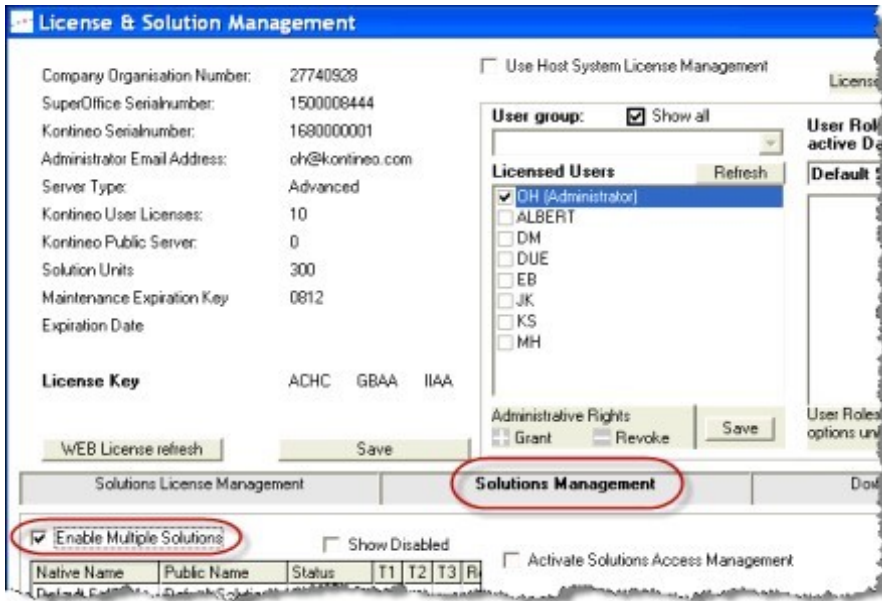
Licenses in use: 6 of 10

<b>Grant User license to users in groups:</b>	<b>Users in selected Group</b>
<input type="checkbox"/> Administration/Marketing	<input checked="" type="checkbox"/> OH
<input checked="" type="checkbox"/> CRMmatrix Division Management	<input checked="" type="checkbox"/> MH
<input checked="" type="checkbox"/> CRMmatrix Management	<input checked="" type="checkbox"/> DM
<input checked="" type="checkbox"/> CRMmatrix Users	<input checked="" type="checkbox"/> HAKONM
<input type="checkbox"/> Due	
<input checked="" type="checkbox"/> Kontineo Administrators	
<b>Grant Admin Rights to users in groups:</b>	<b>Users in selected Group</b>
<input type="checkbox"/> CRMmatrix Management	<input checked="" type="checkbox"/> OH
<input type="checkbox"/> CRMmatrix Users	<input checked="" type="checkbox"/> ALBERT
<input type="checkbox"/> Due	<input checked="" type="checkbox"/> MH
<input checked="" type="checkbox"/> Kontineo Administrators	<input checked="" type="checkbox"/> DM
<input type="checkbox"/> Norway	<input checked="" type="checkbox"/> HAKONM
<input type="button" value="Save"/>	

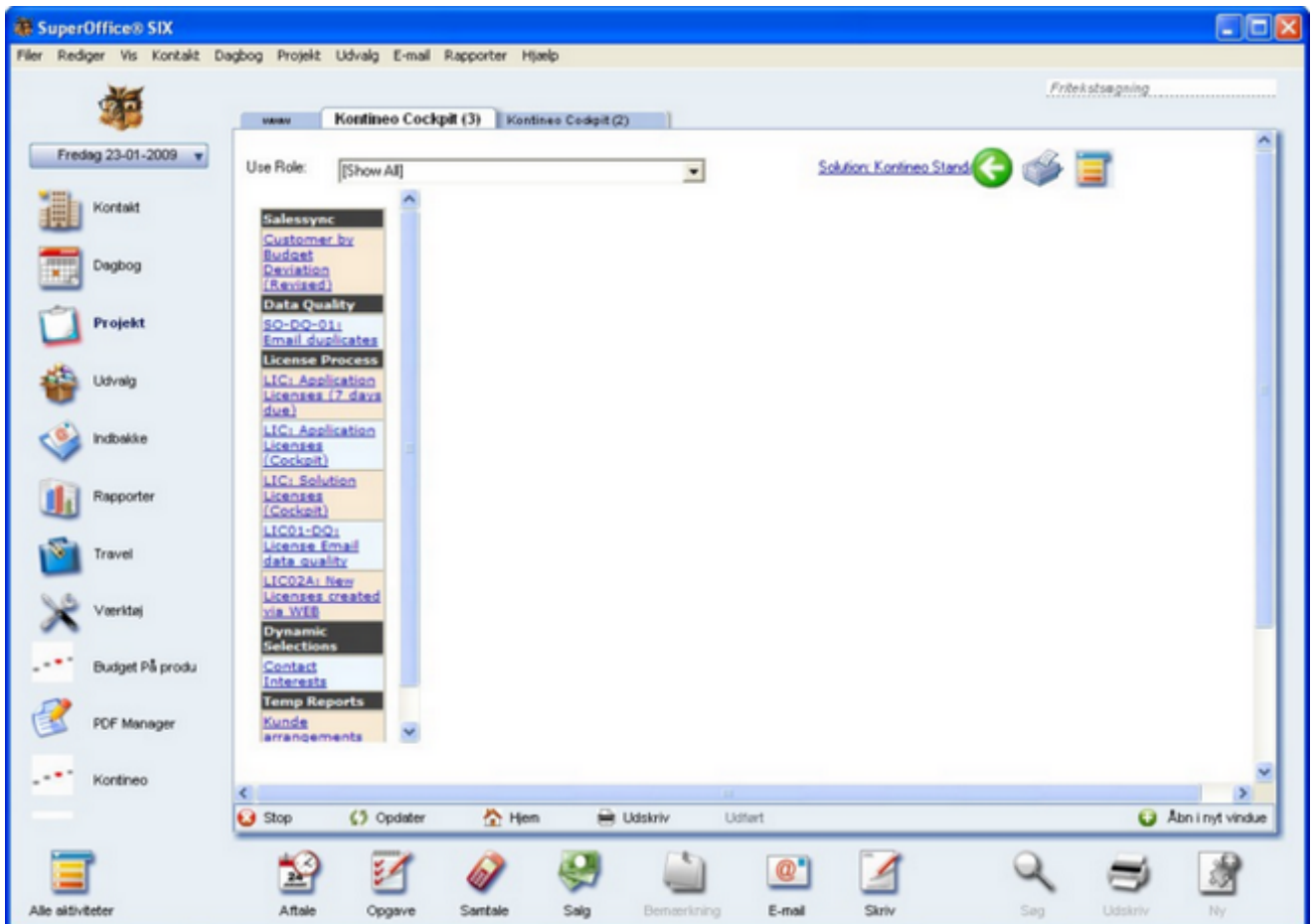
## Multiple Solutions

Administration -> Advanced -> License and Solution Management

- Enable Multiple Solutions



## 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.

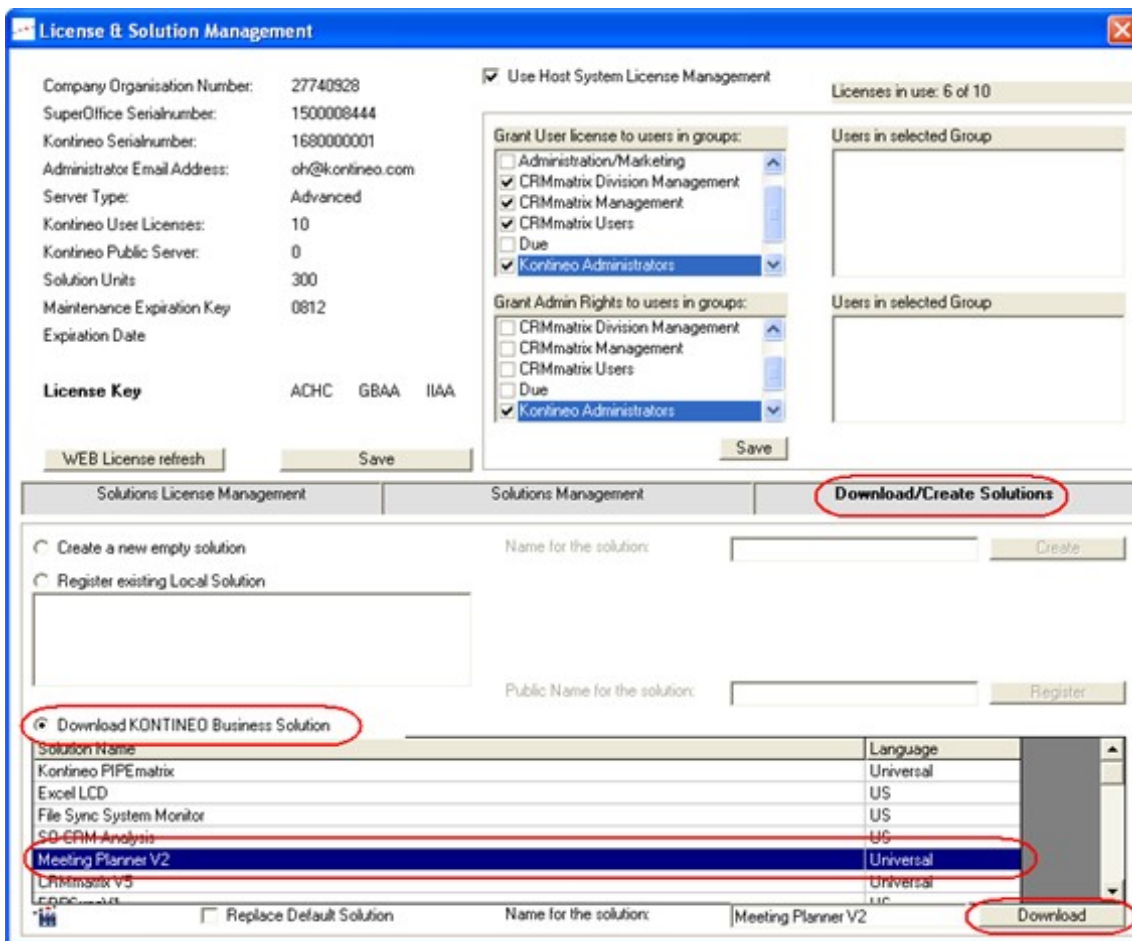
This information may be outdated. please refer to the Kontineo 2006 help file by following [this link](#), to get the latest configuration instructions.

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## Download the Meeting Planner and Import it into Kontineo 2006

You use Kontineo 2006 to Download the Meeting Planner 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 "Meeting Planner" solution in the list, and click the "Download" Button



After clicking download, Kontineo 2006 will download the solution and first check if a License already exists in your SuperOffice database. If not, it will ask you to Activate a License for the Meeting Planner Solution. WEB activation will automatically generate a 30 Days Trial License for the solution. See also Activate License.

Then Kontineo 2006 will reset the Meeting Planner to your system's environment.

- Click the "Solution Management" tab
- Select Meeting Planner in the List
- Set it to Published and click Save



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



You will now have Meeting Planner as a published solution in the Frontpanel "Change Solution" menu.'



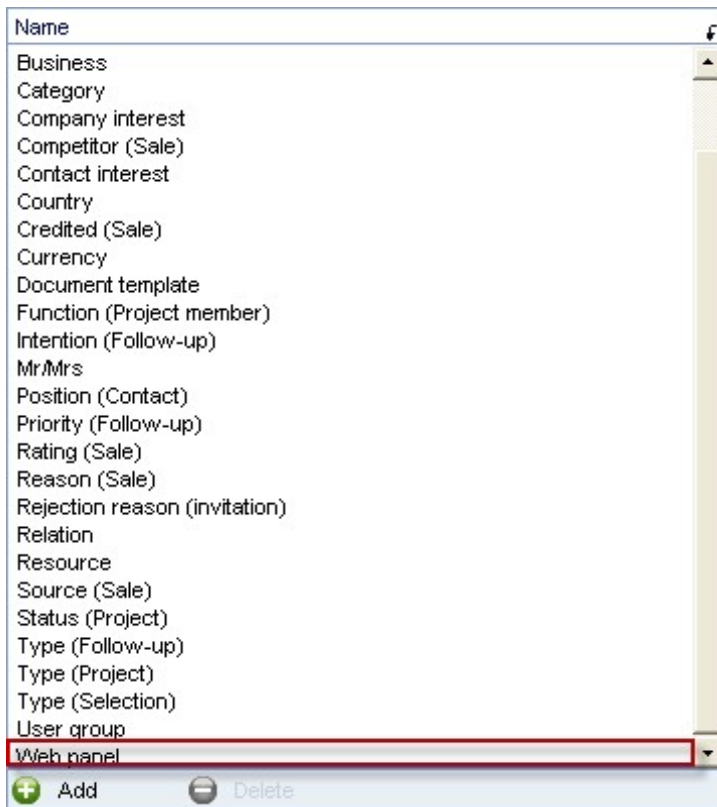
## Configuration of the Meeting Planner solution in SuperOffice

When the Meeting Planner is installed, a little file called "MeetingPlannerMiniPanel.htm" is automatically copied to the SuperOffice template folder, for use with the SuperOffice MiniPanel. To use the Meeting Planner solution with the SuperOffice minipanel, you'll have to configure the SuperOffice admin console. here is a guide on how to do that:

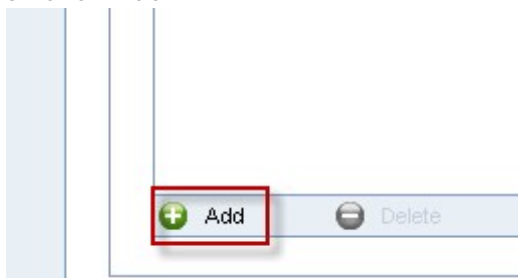
1. Log in to the SuperOffice admin console.
2. Click on "Lists"



3. Scroll to the bottom of the list.
4. Double click "WebPanel".



5. Click Add



6. Double click it, and fill the form with these details:

Name: Meeting Planner(or Planning)

URL: <url-><ptha>template\MeetingPlannerMiniPanel.htm

Visible in: Minicard-->Diary mini card

Show: Status bar(recomended only)

7. To check if everything works, close the SuperOffice admin console, and start Superoffice the normal way.

8. Go to your Diary.



9. Now, if you have [downloaded and imported the Meeting planner solution](#) correctly, do this;

10. Click the list above your calendar



11. Select "Meeting Planner"

12. If the Meeting planner shows up, then Congratulations. You have just succesfully configured meeting planner to work with the SuperOffice minipanel

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## Client Deployment

These steps have to be done in order to deploy the Meeting Planner solution:

- Download and import the Meeting Planner solution into Kontineo 2006 on the server
- Configure the SuperOffice lists, also on the server.
- Publish the solution, also from the server.

Kontineo 2006 will automatically download the meeting planner to a client, when it need it.

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# How to use Meeting Planner

## Customer Nearby Customer Nearby

You can use this report when you have arranged a meeting with a customer in one area, and wants to find other possible customers to arrange another meeting in this area.

1. Find customer with the booked meeting
2. Run Customer nearby
3. A list will appear with all customers in a prioritized order.
4. Click on the company name, and you'll automatically jump to the contact card in SuperOffice.
5. Call and book a meeting with the next customer, and go back to the report for the next customer.



<b>?</b>	<p><b><u>What does Customer Nearby and what is it used for?</u></b></p> <p>With the Customer Nearby functionality you are able to find other possible customers nearby a customer where you already have arranged meeting. You can use this to prevent unnecessary driving between customers.</p>
<b>?</b>	<p><b><u>Is it possible to extend your search area?</u></b></p> <p>If you select the picture with the large red circle, in the Customer Nearby area, you will automatically extend your search area.</p>
<b>?</b>	<p><b><u>Is it possible to go directly from the report to the contact card in SuperOffice?</u></b></p> <p>Yes, you can go directly from the report to the contactcard in SuperOffice with one click on the underlined word</p>

## Show Meetings Nearby

### Show Meetings nearby

When talking to a customer over the phone, and you want to find time for a meeting, where you already are in a nearby area, you can use this report to find it for you.

1. The customer that you are talking to is active in your SuperOffice
2. To check if you are in that specific area on the suggested day, click on 'Show meetings nearby' in the front panel.
3. If you want to go to the contact card, click on the customer name that is underlined
4. By clicking on the name listed in the report, you jump directly to the Person card in SuperOffice
5. If you want to read the Activity showed on the right, click on 'Open Activity'
6. If you want to use a map from Kraks, just click on the icon

Meetings in area (Direct)	
Criteria	Current Criteria
Zipcode	
Country	
Contact details	Appointment details
<b>Type: Calendar Activity</b>	
<b>Date: Wednesday 02-07-2008</b>	
<a href="#">Kontineo Danmark ApS</a>	<a href="#">Åbn aktiviteter</a> <span style="float: right; color: red;">[Incomplete]</span>
Kaldingsvej 2A 6040 Egved Phone: +45 7550 6221 <a href="#">Via e-mail Kraks Kort</a>	Visit out of house - Confirmed Wednesday 02-07-2008 12:00 - 13:00 No Text]
Direct: + Mobile: +	

?	<p><b><u>What does Meetings Nearby and what is it used for?</u></b></p> <p>With the Meetings Nearby you are able to find the date for a meeting where you already have arranged a meeting with another customer in that specific area. This way you can fast plan your meetings in the same area without unnecessary driving.</p>
?	<p><b><u>Is it possible to extend your search area?</u></b></p> <p>If you select the picture with the large red circle, in the Meetings Nearby area, you will automatically extend your search area.</p>

## Search Customers

### Search Customers

If you have decided to visit a certain area, and you need a list of all the customers that you have in that specific area, you can use the 'Search Customer' report.

1. Click on the 'Search Report' button in the Front Panel.
2. Set the criteria: Zipcode (1), Country (2) and City (3) according to your needs. Place the cursor on the criteria you want to change, and the set up is done in the left side of the screen (see the blue marking)
3. Set the Score (4) value
4. remember to refresh (5) the report
5. If you want to jump directly into the Contact Card in SuperOffice place the arrow (6) in front of the company, and click 'Show Company' (7)
6. If you want to send all the companies in the list into a selection in SuperOffice, click on 'Select all Companies' (8)
7. If you want to move one company at a time into a selection in SuperOffice, click on 'Select one company' (9)
8. If you want to send to complete list into a Word document, click on 'Word' (10)

Score	Company Name	Country	Zipcode	City	Phone
5334		Danmark	6000	Kolding	
10200		Danmark	6000	Kolding	
401		Danmark	6000	Kolding	
401		Danmark	6000	Kolding	
300		Danmark	6000	Kolding	
81		Danmark	6000	Kolding	
35		Danmark	6000	Kolding	
27		Danmark	6000	Kolding	
25		Danmark	6000	Kolding	
10		Danmark	6000	Kolding	

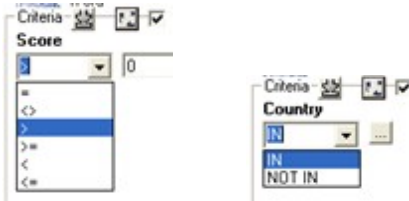
Criteria		Current Criteria
Zipcode	begins with	60
Country	IN	Denmark
City	begins	kolding
Score	>	0

?	<p><b><u>Is it possible to create your own Customer in area Report?</u></b></p> <p>Within the criteria Zipcode, Country, City and Score you can create your own Customer Area Report.</p>
?	<p><b><u>Can you add more criteria to your report?</u></b></p> <p>Not as a standard.</p>

**Is it possible to always change the conditions of the report?**

In the blue box above you can see which conditions the report is running. Right now the conditions for the Zipcode is 'begins with' Since the text is light grey it is not possible to change this.

If the text is normal, you have the possibility to change it within the possibilities in the box.



**Mathematically and logically functions.**

A number of logical symbols are used to make the precise selection in the database. A part of them will be described in the following examples. A complete overview of the symbols will be listed under here.



Symbol	Explanation
=	be equal to
<>	different from
>	Larger than
>=	Larger than or equal to
<=	Smaller that or equal to
<	Smaller than
IN	Only the chosen is part of the report
NOT IN	All other than the chosen is part of the report.

## Show Planned Meetings

### Show Planned Meetings

If you want an overview of your meetings, or just a printer friendly version of your meeting planner, you can use the 'Show Meeting Planner'

1. Click on 'Show Meeting Planner' in the Front Panel
2. If you want to go to the contact card or person card, click on the customer name that is underlined

In this report you have, in the right side, links directly to

1. Show customers in zipcode 60\*
2. Show customers in zipcode 6\*
3. Show meetings in zipcode 6\*
4. Edit Appointment

Contact Details	Activity Details	Links...
<b>Date: Wednesday 28-01-2009</b> Type: Calendar Activity <u>Kontineo Danmark ApS</u> Keldingvej 2A 6040 Eghved Phone: +45 7550 6221; <a href="#">Google Maps</a> <u>Marianne Hansen</u> Direct: +45 46 98 6821 Mobile: +45 40287634 <a href="mailto:mb@kontineo.com">mb@kontineo.com</a>	Visit out of house - Prebooked Wednesday 28-01-2009 17:30 - 19:00	<a href="#">Show customers in zipcode 60*</a> <a href="#">Show customers in zipcode 6*</a> <a href="#">Show meetings in zipcode 6*</a> <a href="#">Edit Appointment</a>

<b>?</b>	<p><b><u>Can you print a list with your planned meetings?</u></b></p> <p>Click on Show Planned Meetings in the Minipannel, and a complete list will appear. In the list you also have the possibility to extend your search in the right side of the report.</p>
<b>?</b>	<p><b><u>Can you go directly to the contact card?</u></b></p> <p>One Click on the underlined company name, and you will go directly to the contactcard. A click on any underlined text is a link.</p>
<b>?</b>	<p><b><u>Is it possible to change the zipcode?</u></b></p> <p>No, you can not change the zipcode in this report</p>
<b>?</b>	<p><b><u>Is the Meeting Planner International?</u></b></p> <p>Yes, since the Zipcode in the left column adjust to the zipcode in the right column, and Google Maps is an international solution, you can use the Meeting PLanner in any country.</p>

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