



# *Conflux*

**Conflux CRM**

**User Guide**

**v 1.2**

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# 1. CRM General

Conflux Customer Relations Management is a flexible and powerful tool for optimizing your sales processes. By using Conflux CRM, your client and contact data always only two clicks away. In addition all sales data is shared among the sales representatives to maximise the effects of team selling. Each event and other bit of information about the clients is stored in the database and available at any time for review and analysis. Conflux CRM gives a quick and compact overview of ongoing sales to the sales representatives and statistics about the sales and salespersons activities to the administration.

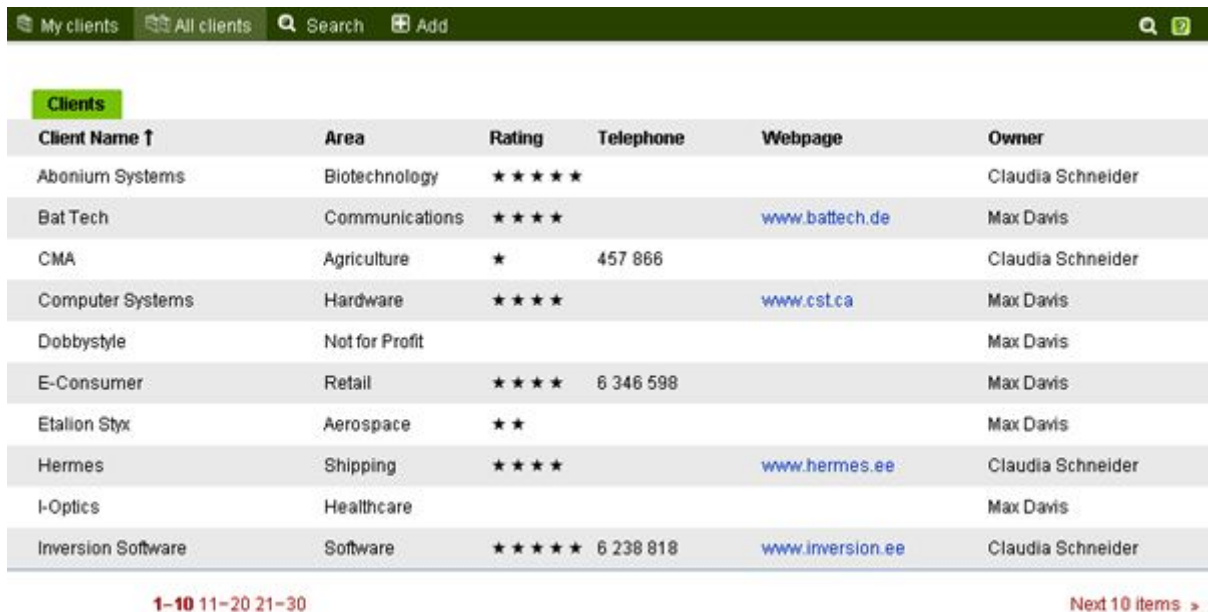
## Benefits

- Increased sales revenues from more efficient sales work.
- The ability to compare sales representatives based on their activities and performance.
- Improved client relationships.
- Stored client history.
- The ability to separate more profitable clients from others.
- Advanced statistics based on clients, sales and products.

## 2. Clients

### 2.1 Menu: My clients/All clients

My clients view is the first thing that you see when you enter the clients module. This is the list where all your clients are displayed. The list also displays clients industry, rating, telephone and web page. To see more information about the client, click on the client name to opens client details view (see section 2.4). The client listing is ordered by client name by default and can be reordered by clicking on the desired column header. For example you can click on the rating header to see the clients listing ordered by rating. The All clients view is basically the same thing as My clients, the difference is that there are displayed all clients you have access permission to see, not just your own clients.



Client Name ↑	Area	Rating	Telephone	Webpage	Owner
Abonium Systems	Biotechnology	★★★★★			Claudia Schneider
Bat Tech	Communications	★★★★		<a href="http://www.battech.de">www.battech.de</a>	Max Davis
CMA	Agriculture	★	457 866		Claudia Schneider
Computer Systems	Hardware	★★★★		<a href="http://www.cst.ca">www.cst.ca</a>	Max Davis
Dobbystyle	Not for Profit				Max Davis
E-Consumer	Retail	★★★★	6 346 598		Max Davis
Etallon Styx	Aerospace	★★			Max Davis
Hermes	Shipping	★★★★		<a href="http://www.hermes.ee">www.hermes.ee</a>	Claudia Schneider
I-Optics	Healthcare				Max Davis
Inversion Software	Software	★★★★★	6 238 818	<a href="http://www.inversion.ee">www.inversion.ee</a>	Claudia Schneider

1-10 11-20 21-30 Next 10 items >

Picture: Client listing

## 2.2 Menu: Add

Clicking on the Add menu opens the new client adding form. The client name is only field that is mandatory to fill, but it is strongly suggested that you fill as many as you can as it will make your and others lives easier in the future when you need information about the client.

<b>Add Client</b>			
Client Name*	Legalia 2000	Client Type	Client
Client Number	35647	Area	Legal
Telephone	6 259 688	Rating	
Fax	6 259 689	Ownership	
E-mail	legalia@legalia.za	Webpage	www.legalia.zm
Registration number	900035699	Vat number	
Country	Zambia		
Mail address	Plot. No. 2021 Church Road Lusaka		
Registration address			
Description			
Bank info			
Save			

Picture: Add client form

## 2.3 Menu: Search

The client search form offers the functionality of finding clients quickly and conveniently. The search tab is divided into two: a simple Search form and an Advanced Search form. The simple search form is displayed by default, clicking on the „Advanced Search“ link switches the forms.

### Simple search:

Allows to search clients by unified keyword search over clients meta data.

### Advanced search:

Advanced search allows the user to define clear parameters for client searches.

## 2.4 View Client

Click on the client name in the client listing to open the “view client” view. The view displays all information about the client. On the top of the page are displayed five tabs: Info, Relations, Notes, Contacts and Log. The info tab is active by default. The contacts tab lets you create connections between the client and contacts. About relations relations, notes and log you can read more in section 6.1, 6.2 and 6.3. On the bottom of the page are two buttons: edit and delete, clicking on the edit button will open the client edit form, you can delete the client by clicking the delete button.

**Client: Inversion Software**

**Info** Relations (2) Notes (1) Contacts (2) Log

<b>Client Name:</b>	Inversion Software	<b>Client Type:</b>	Partner
<b>Client Number:</b>		<b>Area:</b>	Software
<b>Telephone:</b>	6 238 818	<b>Rating:</b>	★★★★★
<b>Fax:</b>	(+372) 623 8818	<b>Ownership:</b>	OU
<b>E-mail:</b>	<a href="mailto:inversion@inversion.ee">inversion@inversion.ee</a>	<b>Webpage:</b>	<a href="http://www.inversion.ee">www.inversion.ee</a>
<b>Registration number:</b>	10827700	<b>Vat number:</b>	EE100738418
<b>Country:</b>	Estonia		
<b>Mail address:</b>	Puhkekodu 7, Tallinn 12013, Estonia	<b>Registration address:</b>	Puhkekodu 7, Tallinn 12013, Estonia
<b>Description:</b>	Inversion Software is a company developing software for the new era. Its main area of activity is the design and implementation of internet based information systems.		

**Edit** **Delete**

**Picture: View client form**

## 2.5 Edit client info

Click on the edit button in the client view to open the edit client form, make the required changes and click on the save button to save changes.

### 3. Contacts

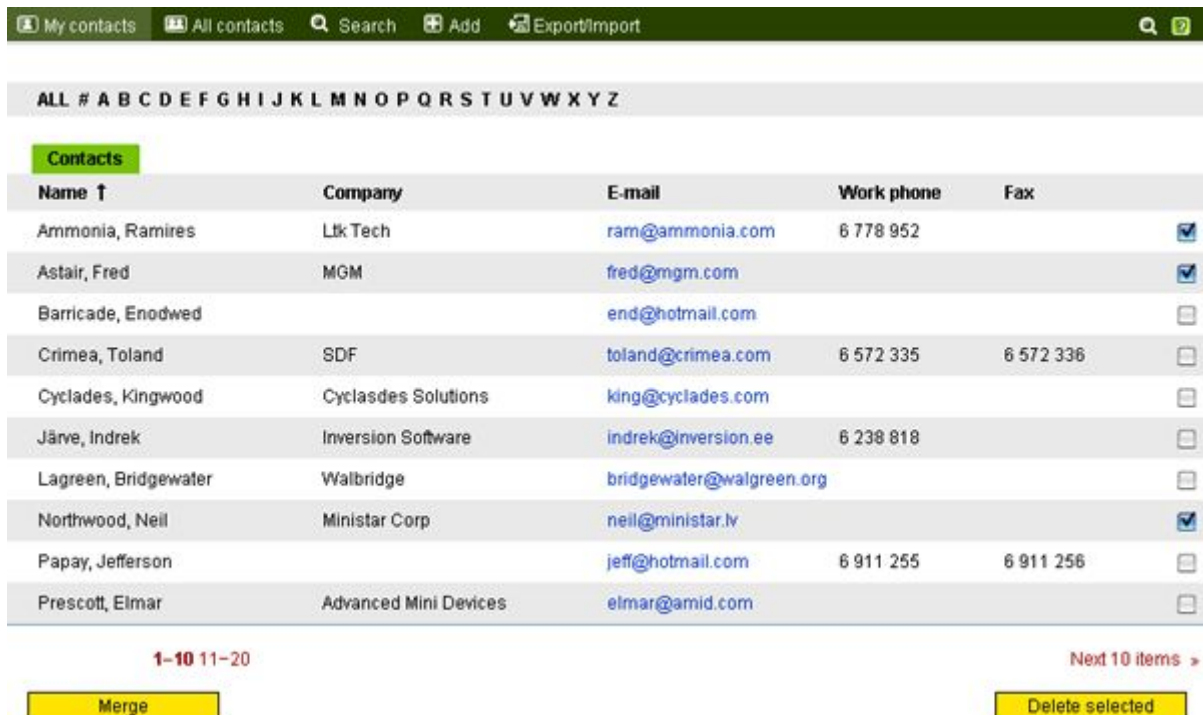
The contact database is a convenient way of recording and searching the data of clients and any related people. You no longer need to skim through your notebooks and read tens and tens of notes on your table, if you need to find a telephone number. You just need to type a few keywords or the name of the client in the contact search form and this result is quickly displayed on your screen. Generally, all contacts are shared and public, meaning that all users under the same organisation can see and modify shared contacts. The exceptions are the private contacts, which are visible only to their owners. The contacts module also works as an address book, which means that while sending an e-mails you can quickly select the mail receivers from the contact list.

#### 3.1 Menu: My contacts

The "My contacts" view displays only the contacts added by the active user. This includes public and private contacts.

#### 3.2 Menu: All contacts

The "All contacts" view displays all contacts visible to the user. This basically means that the user will see all public contacts added by anyone under an organisation for which he/she has read access to. By default, the list is ordered by the last and first name of the contacts. Clicking on a contact name opens contact details view (see section 3.6).



Picture: Contact listing

### 3.3 Menu: Add

Clicking on the Add menu opens the contact adding form. Contact first and last name are the fields that are mandatory to fill, all other fields are optional and help you to keep more information about the contact.

Add new contact			
First name*	Chales	Company	EMCA
Middle names		Department	Administration
Last name*	Ryan	Job title	CTO
Work phone	6 893 336	Fax	6 893 337
Cell phone	58 261 933	Home phone	
E-mail	charles.ryan@emca.com	Webpage	
Address		Description	
3276 South Street Hopkinton, MA 01749		Grumpy old man :)	
Date of Birth	09/17/1966	Category	Business Personal Other
Sex	Male		
Private	<input checked="" type="checkbox"/>		
<input type="button" value="Save"/>			

Picture: Add contact form

### 3.4 Menu: Search

The contact search form offers the functionality of finding contacts quickly and conveniently. The search tab is divided into two: a simple Search form and an Advanced Search form. The simple search form is displayed by default, clicking on the „Advanced Search“ link switches the forms.

#### Simple search:

Allows to search contacts by unified keyword search over clients meta data.

#### Advanced search:

Advanced search allows the user to define clear parameters for contact searches.

The contact search can be also used for sending mass e-mails as you can check the desired contacts from the search result and click on the "send e-mail" button to send an e-mail to all of them.



### 3.5 Menu: Export/Import

Contacts can be exported and imported in CSV (comma separated) and XML formats.

**Importing contacts:** Browse for the exported contact file on your computer (XML or CSV format) and select behaviour on importing contacts with matching names with existing contacts:

- **Insert as new** – insert identically named contacts as new
- **Update existing contacts** – update existing identically named contacts with new imported data
- **Leave out** – do not import identically named contacts

**Exporting contacts:** Fill out the “Export” form and click on the “Export” button.

Data selection (Export):

- All contacts – all visible contacts to the user
- My contacts – only the contacts added by the user

Output format:

- XML – Conflux XML contact export format
- CSV – comma separated text format

### 3.6 View Contact

Click on the contact name in the contact listing to open the “view contact” view. The view displays all information about the contact. On the top of the page are displayed five tabs: Info, Relations, Notes, E-mails and Log. The info tab is active by default. The e-mails tab shows you all e-mails exchanged between you and the contact, excluding the ones which are in deleted items folder. You can edit contact information by clicking the edit button on the bottom left of the screen.

### 3.7 Edit Contact Info

Click on the edit button in the contact view to open the edit contact form, make the required changes and click on the save button to save changes.

### 3.8 Merge Contacts

In some cases you might have two entries of the same contact (for example you add one and some of your colleagues adds another). In this case you can use the "Merge Contacts" functionality to merge these two. Check these two contacts in the contact listing and click on the merge button on the bottom-left of your screen. A view opens where you can set the primary contact. The primary contact is the one you wish to keep. Setting the primary contact opens the contact merge form. You can modify the data field manually and switch the data between two contacts by clicking on the button with arrows. Click on the save button when you are done. Merging contacts will also transfer all notes attached to the secondary contact to the primary contact as well as all relations also.

Merge Contacts	
This contact remains.	This contact gets deleted.
First name * Fred	Neil
Middle names	
Last name * Astair	Northwood
Company MGM	Ministar Corp
Department	
Job title	
Work phone	
Home phone	
Cell phone	
Fax	
E-mail fred@mgn.com	neil@ministar.lv
Webpage	
Address	
Description	
Category Business Personal Other	
Sex	
Date of Birth	
Save	

Picture: Contact merging form

## 4. Products

### 4.1 Menu: Products

The products view displays all products visible to the users, as well as their product group, unit and price. The listing is ordered by product name by default. Clicking on the product name opens the View/Edit product form.



The screenshot shows a web interface for the 'Products' menu. At the top, there is a dark green header with 'Products' and an 'Add' button. Below the header is a table with the following columns: Product Name, Product Group, Unit, and Price. The table lists ten products, including 'Bronze Support', 'Bud light', 'Gigabyte G-Max', 'Oracle 10g Enterprise edition', and 'eServer x305'. At the bottom of the table, there is a pagination control showing '1-10 11-20' and a 'Next 10 items >' link. A yellow 'Delete' button is located at the bottom right of the table area.

Product Name ↑	Product Group	Unit	Price
Bronze Support	Support	Year	€450.00
Bud light		Barrel	€50.00
Gigabyte G-Max	Hardware: Laptops	pcs	€1540.00
Gigabyte G-Max N-501	Hardware: Laptops	pcs	€1214.00
Gigabyte G-Max N601	Hardware: Laptops	pcs	€1537.00
Oracle 10g Enterprise edition	Software: Licenses	pcs	€36000.00
Oracle Training	Training	3 days	€2500.00
eServer x305	Hardware: Servers	pcs	€2346.00
eServer x335	Hardware: Servers	pcs	€4020.00
eServer x345	Hardware: Servers	pcs	€5280.00

Picture: Product listing

### 4.2 Menu: Add

Clicking on the Add menu opens the product adding form. Product name is mandatory to fill, all other fields are optional and help you to keep more information about the product. Price is strongly suggested to fill as well, since it helps you later when you might want to connect sales opportunities with products.

## 4.3 View/Edit product

Click on the product name in the product listing to open the product view/edit form. Here you can see all product information, related objects and notes. Additionally you can change the product information here. Clicking on the "Reports" tab opens the product sales reports (see Section 4.4).

## 4.4 Reports

You can enter the reports section from the View/Edit product view by clicking on the reports tab. On the first screen you can choose reports duration by start and end dates. You can select the dates from built-in shortcuts or enter them manually. Additionally you can choose the type of report between compact and full. The compact report shows only total sales figures while full report specifies the amounts between individual clients. The report is generated from the opportunity information.



The screenshot shows a web interface for a product named 'Bud light'. At the top, there is a navigation bar with 'Products' and an 'Add' button. Below this, the product name 'Product: Bud light' is displayed. A row of tabs includes 'Edit Product', 'Relations (0)', 'Notes (0)', 'Log', and 'Reports', with 'Reports' being the active tab. Below the tabs, the product name 'Product: Bud light' is repeated. The main content area shows 'Sales statistics during 01/01/2004-07/27/2004' and a table with the following data:

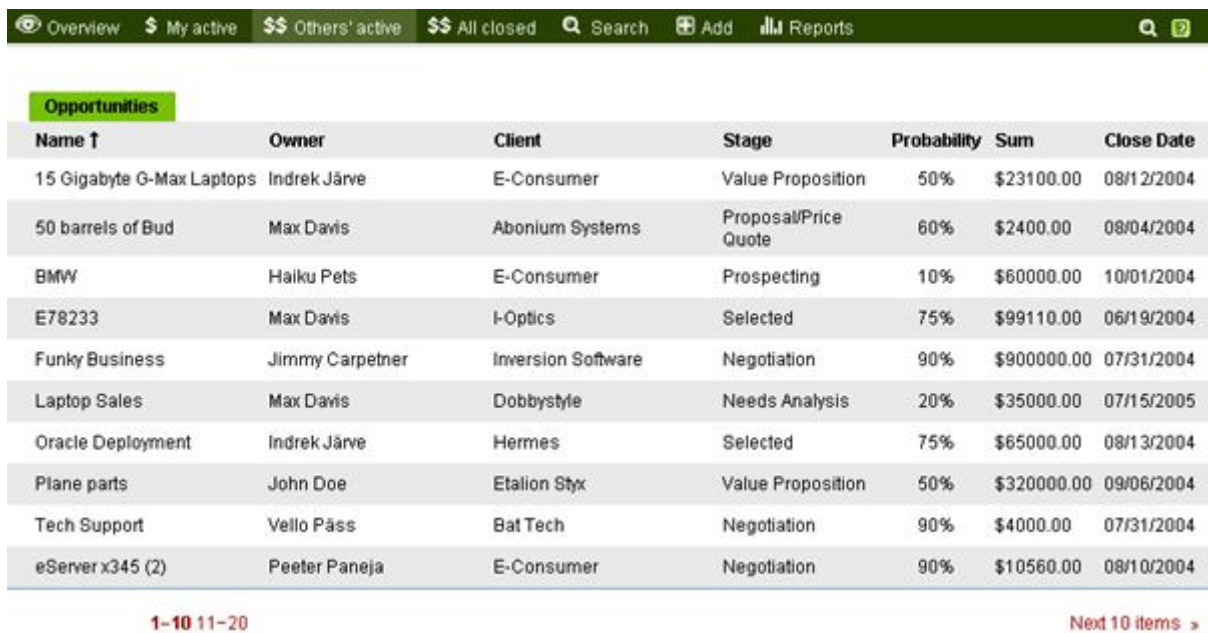
Client	Closed Won	Closed Lost	Pending
Abonium Systems	€0	€0	€43200
E-Consumer	€308000	€2000	€2000
Hermes	€900000	€0	€0
Inversion Software	€0	€0	€144000
<b>Total</b>	<b>€1208000</b>	<b>€2000</b>	<b>€189200</b>

**Picture: Product sales reports**

## 5. Opportunities

### 5.1 Menu: My active/Others' active/All closed

The three opportunity listings display opportunities, their owners, clients, stages, sums and close dates. My active displays active opportunities added by you, Others' active displays active opportunities added by other persons and All closed displays all closed (won and lost) opportunities. Clicking on the opportunity name opens view opportunity form.



The screenshot shows a web application interface with a navigation bar at the top containing 'Overview', 'My active', 'Others' active', 'All closed', 'Search', 'Add', and 'Reports'. Below the navigation bar is a table titled 'Opportunities' with the following columns: Name, Owner, Client, Stage, Probability, Sum, and Close Date. The table contains 10 rows of data. At the bottom of the table, there is a pagination control showing '1-10 11-20' and a link for 'Next 10 items >'.

Name ↑	Owner	Client	Stage	Probability	Sum	Close Date
15 Gigabyte G-Max Laptops	Indrek Järve	E-Consumer	Value Proposition	50%	\$23100.00	08/12/2004
50 barrels of Bud	Max Davis	Abonium Systems	Proposal/Price Quote	60%	\$2400.00	08/04/2004
BMW	Haiku Pets	E-Consumer	Prospecting	10%	\$60000.00	10/01/2004
E78233	Max Davis	I-Optics	Selected	75%	\$99110.00	06/19/2004
Funky Business	Jimmy Carpetner	Inversion Software	Negotiation	90%	\$900000.00	07/31/2004
Laptop Sales	Max Davis	Dobbystyle	Needs Analysis	20%	\$35000.00	07/15/2005
Oracle Deployment	Indrek Järve	Hermes	Selected	75%	\$65000.00	08/13/2004
Plane parts	John Doe	Etalion Styx	Value Proposition	50%	\$320000.00	09/06/2004
Tech Support	Vello Päss	Bat Tech	Negotiation	90%	\$4000.00	07/31/2004
eServer x345 (2)	Peeter Paneja	E-Consumer	Negotiation	90%	\$10560.00	08/10/2004

Picture: Opportunity listing

### 5.2 Menu: Add

Clicking on the Add menu opens the opportunity adding form. Several fields are mandatory to fill like opportunity name, owner which is the user by default, client, close date and opportunity stage. Filling other fields is voluntary but strongly suggested. If you plan to add products to the opportunity, then do not fill the sum field, the sum will be calculated automatically from the products data.

## 5.3 View Opportunity

Click on the opportunity name in the opportunity listing to bring up the opportunity view form. The opportunity view form displays all opportunity information and products related to the opportunity. Clicking on the "Edit" button brings up the opportunity edit form, new products can be added to the opportunity by clicking the "Add Product" button. Products can be removed from the opportunity by clicking the "Del" link on their action column. Product price, discount and amount can be edited by clicking the "Edit" link on its action column.

**Sales Opportunity: 15 Gigabyte G-Max Laptops**

[Info](#)
[Relations \(3\)](#)
[Notes \(7\)](#)
[Log](#)

<b>Name:</b>	15 Gigabyte G-Max Laptops	<b>Owner:</b>	Indrek Järve
<b>Client:</b>	E-Consumer	<b>Close Date:</b>	08/12/2004
<b>Stage:</b>	Value Proposition	<b>Probability:</b>	50%
<b>Client Type:</b>	New Business	<b>Lead Source:</b>	Employee Referral
<b>Sum:</b>	\$18250.00	<b>Next Step:</b>	Visit on Monday 9:00

**Description:** **Requirements Description:**

Edit
Delete

**Products**

Name	Group	Unit	Price	Discount %	Amount	Key Requirement	Action
Gigabyte G-Max	Hardware: Laptops	pcs	\$1309.00	15%	10	Fast deployment	<a href="#">Edit</a>   <a href="#">Del</a>
Gigabyte G-Max N-501	Hardware: Laptops	pcs	\$1032.00	15%	5	Fast deployment	<a href="#">Edit</a>   <a href="#">Del</a>

Add Product

Date	Stage	Probability	Modified by
07/20/2004	Needs Analysis	20%	Angelina Patric
07/27/2004	Value Proposition	50%	Angelina Patric

**Picture: Opportunity view**

## 5.4 Edit Opportunity

Click on the "Edit" button in the opportunity view to open the opportunity edit form, make the required changes and click on the save button to save changes.

## 5.5 Menu: Search

The opportunity search form offers the functionality of finding opportunities quickly and conveniently. The search tab is divided into two: a simple Search form and an Advanced Search form. The simple search form is displayed by default, clicking on the „Advanced Search“ link switches the forms.

### Simple search:

Allows to search opportunities by unified keyword search over meta data.

### Advanced search:

Advanced search allows the user to define clear parameters for opportunity searches.

## 5.6 Menu: Overview

Like the name says, the overview section is the fastest way to see what is going on. On the top of the screen are displayed top five active opportunities by amount. Clicking on the opportunity name opens opportunity view form. Below are displayed active opportunities by salespersons.

## 5.7 Menu: Reports

The reports section consists of five different reports:

- Total sales
- Sales by clients
- Sales by products
- Sales by representatives
- Sales by clients and products

The content of each report should be self-explanatory. The period of each report can be selected from built-in shortcuts (This month, last month, This year, etc) or entered manually.

**Sales statistics during 06/01/2004-06/30/2004**

Product	Closed Won	Closed Lost	Pending
Bud light	\$308000	\$0	\$0
Gigabyte G-Max	\$0	\$0	\$23830
Gigabyte G-Max N-501	\$0	\$0	\$75280
Oracle 10g Enterprise edition	\$12970	\$0	\$0
Oracle Training	\$32500	\$0	\$0
<b>Total</b>	<b>\$353470</b>	<b>\$0</b>	<b>\$99110</b>

**Picture: Report**

## 6. General

### 6.1 Relations

Relations is the key for keeping connections between the objects in Conflux. Almost every type of object in the Conflux server can be connected to other objects through relations. To view object relations, open the object view form and click on the "Relations" tab. A list of relations is displayed, grouped by the relation type. To add a new relation, decide which type of object you want to connect to this object and click on that types "Add" or "Choose" button. The "Add" button allows the user to add a new object of this type which will be connected. The "Choose" button allows the user to select a pre-existing object for the connection.

**Sales Opportunity: 15 Gigabyte G-Max Laptops**

Info Relations (10) Notes (7) Log

**Relations**

**Documents** Add Choose

Name	Owner	Created on	Edited on	Action
Contract	Indrek Järve	07/28/2004 12:04	07/28/2004 17:27	Edit   Del
Gigabyte G-Max Brochure	Angelina Patric	07/28/2004 17:25	07/28/2004 17:25	Edit   Del

**Events** Add Choose

Name	Owner	Created on	Edited on	Action
E-Consumer: Negotiations	Angelina Patric	07/28/2004 17:19	07/28/2004 17:19	Edit   Del

**Tasks** Add Choose

No records specified.

**Contacts** Add Choose

Name	Owner	Created on	Edited on	Action
Fred Astair	Angelina Patric	05/14/2004 15:35	07/26/2004 15:39	Edit   Del
Jefferson Papay	Angelina Patric	05/14/2004 15:35	07/26/2004 15:48	Edit   Del

**Workflows** Add Choose

No records specified.

**Clients** Add Choose

Name	Owner	Created on	Edited on	Action
Dobbystyle	Max Davis	05/30/2004 15:25	07/26/2004 09:46	Edit   Del
E-Consumer	Max Davis	05/30/2004 15:26	07/26/2004 09:49	Edit   Del

**Opportunities** Add Choose

No records specified.

**Products** Add Choose

Name	Owner	Created on	Edited on	Action
Gigabyte G-Max	Angelina Patric	07/15/2004 08:40	07/27/2004 10:03	Edit   Del
Gigabyte G-Max N-501	Angelina Patric	07/15/2004 08:40	07/27/2004 10:03	Edit   Del
Gigabyte G-Max N601	Angelina Patric	07/20/2004 11:46	07/27/2004 10:04	Edit   Del

Picture: Relations View



## 6.2 Notes

Similarly to relations, most types of objects in the Conflux server can have notes added to them. Notes are a way of storing small bits of information or comments about an object. Notes are public so they are visible to everyone.

**Adding a note:** Click on the "Add" button to open the "Add a note" form. Fill out the text form and click on "Save". A note has been added.

**Changing notes contents:** Click on the note creators name to open the "Edit note" form. Fill out the text form and click on "Save". The note has been changed.

**Deleting notes:** click on each checkbox in the corresponding rows of notes you want to delete and then click on the "Delete selected" button.

**NB!** Changing and deleting notes is only possible if you are the author of the note.

From	Contents	
John Doe 07/25/2004 09:43	Yeah, I guess the company holidays on Hawaii are nice :)	<input type="checkbox"/>
Fred Johnson 07/25/2004 09:39	That was definitely a beautiful sunset.	<input type="checkbox"/>

Add Delete selected

Picture: Example of the note list.

## 6.3 Log

All changes made to objects in the Conflux server are logged for historical and review purposes. To example an object's change log, enter the object view form and click on the "Log" tab. By default, a compact list of users who changed the active object is displayed. To see more details about the specific change, click on the appropriate "Show Details" button. To show all changes, click on the "Show all" button.

### Product: Gigabyte G-Max

Field	Old Value	New Value
Price	1540.00	1520.00

Log: Gigabyte G-Max Show All

Modified by: Angelina Patric Modified on: 07/28/2004 17:48 Hide Details

Modified by: Angelina Patric Modified on: 07/27/2004 10:03 Show Details

Modified by: Angelina Patric Modified on: 07/27/2004 09:58 Show Details

Modified by: Angelina Patric Modified on: 07/27/2004 09:40 Show Details

Picture: Log output