GEOCOM®

Lotus Domino® Application

GeoCom®
Customer & Contacts

Version 6.0 Build 254 – 29th November 2004

UPDATE 6.0 BUILD 254

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Contents

1 Introduction

This documentation describes the changes to GeoCom® Customer & Contacts 6.0 Build 254.

With the update GeoCom® Customer & Contacts 6.0 Build 254 we will introduce some improvements which will be explained in the following.

2 New license key required

Together with the update GeoCom® Customer & Contacts 6.0 Build 254 a new licence key is delivered which has to be entered into the according section of the global configuration document.

3 Configuration Re-Submission

The section “Re-Submission“ has been added to the global configuration document. Within this section settings according to the re-submission functions of GeoCom® Customer & Contacts can be specified.

The sub-section “Agent Update Re-submission“ has been moved to this section from section “Common settings“.

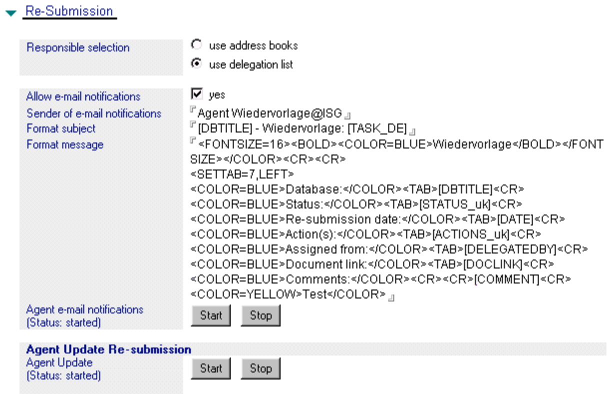


Illustration: Section “Re-Submission“

3.1 Responsible selection

Within the global configuration document you can now specify how the responsible of a re-submission action should be selected. The available options are “use address books“ and “use delegation list“.

Activating "use delegation list" will open an assignment list consisting of certain contact profiles upon selecting the responsible (see below). If the lists does not contain any entries or if the selection is cancelled, automatically the names and address book will be opened.

☛ **Note:** The form for managing contact profiles holds a field "Name to delegate" which is only visible in editing mode. If a valid Notes name is entered here, the corresponding contact will be linked to this Notes name and added to the selection list.

The purpose of this selection list is to allow quick assignment to small user groups without having to select from the full address book each time.

Example:

The possible responsibles for a re-submission action are added as contacts to the own company's customer profile, if not already done. Into the field "Name to delegate" for each user the corresponding Notes user name is entered.

Upon selecting the responsible for a re-submission action, only the predefined contacts will be shown instead of the full address book. If one of these contacts is selected as responsible, the corresponding Notes user name will be entered into the field.

If a person other than these predefined contacts should be selected as responsible, simply cancel the selection and automatically the Notes address book will be opened from which you can select your entry.

In case the names and address book should always be opened (independent of contact profiles with the entry "Name to delegate"), select the option "use address books". Now the assignment list will be suppressed and selection can be made from the full address book.

3.2 E-mail notifications for re-submission

With the current update of GeoCom® Customer & Contacts an e-mail message instead of (or in addition to) an alarm message can be sent by a re-submission action.

In order to enable e-mail notifications for re-submissions, some settings have to be done within the global configuration document.

Allow e-mail notifications

If you want to allow e-mail notifications for re-submission actions, activate this checkbox.

Sender of e-mail notifications

Into this field, enter the sender’s name for the e-mail.

Format subject

Enter the subject line of the e-mail which is to be sent as notification. In addition to plain text you can also use several placeholders, which will be replaced at runtime (see “placeholders“ below).

In case you do not specify a subject line, GeoCom® Customer & Contacts will use an internal standard definition.

Format message

Into this field you can enter the message of the e-mail. In addition to plain text you can also use tags for formatting and several placeholders, which will be replaced at runtime (see below, “formatting“ and “placeholders“).

In case you do not specify a message text, GeoCom® Customer & Contacts will use an internal standard definition.

3.2.1 Formatting

The following tags can be arbitrarily used to define the formatting of the e-mail notifications.

Carriage return	*<CR>*
Section break	* *
Font type	*<FONT=Courier>* *<FONT=Helv>* *<FONT=Roman>*
Tabstop	*<TAB>*
Bold (opening and closing tags)	*<BOLD> ... </BOLD>*
Font size	*<FONTSIZE=12>*
Italics	*<ITALIC> .. </ITALIC>*
Font color	*<COLOR=BLUE>*
Strikethrough	*<STRIKETHROUGH>..*

	</STRIKETHROUGH>
Underline	*<UNDERLINE>...</UNDERLINE>*
Pagebreak	*<PAGEBREAK>*
Set tab to 10cm left bound	*<SETTAB=10, LEFT>*
Set tab to 15cm decimal	*<SETTAB=15,DECIMAL>*
Clear all tab settings	*<CLEARALLTABS>*

3.2.2 Placeholders within messages and subject lines

The following placeholders will be replaced with the corresponding values at runtime.

Title of database	*[DBTITLE]*
Status of re-submission german / english	*[STATUS_DE]* *[STATUS_UK]*
Re-submission date	*[DATE]*
Priority german / english	*[PRIORITY_DE]* *[PRIORITY_UK]*
Responsible	*[RESPONSIBLE]*
Action(s) german / english	*[ACTIONS_DE]* *[ACTIONS_UK]*
Comments	*[COMMENT]*
Re-submission was delegated by	*[DELEGATEDBY]*
Name of the original docu-ment german / english	*[TASK_DE]* *[TASK_UK]*
Document link	*[DOCLINK]*

4 New form: Letter

In addition to the already known forms to manage outgoing correspondence, the form “Letter“ has been provided. This form allows for arbitrarily customizable correspondence, even without having to use MS Word.

For this purpose, just alike to customizable e-mails, placeholders for current field values from contact documents and formatting tags regarding font type, font style and tab settings can be used.

This type of form can be used for single correspondence as well as mass mailings.

5 Import function

From version 6.0 Build 254, GeoCom® Customer & Contacts disposes of an integrated import function which can be used to comfortably import data for customers or contacts from the local address book.

Within the group of views “Maintenance... a. Export – Import...“ the new subview “Import“ is available now. From this subview, import actions can be managed.

By using the button “Import from Address Book...“ a dialog opens from which you can specify settings regarding an import action.

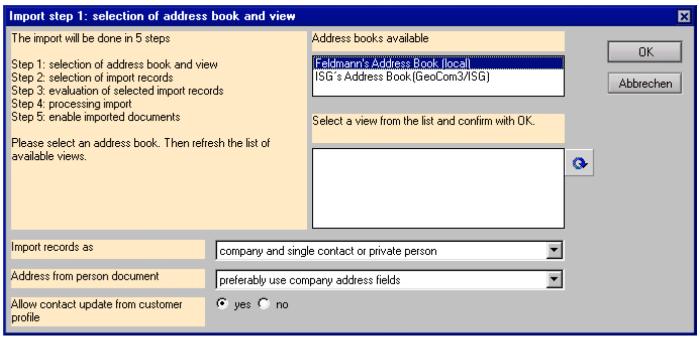


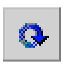
Illustration: Dialog Import step 1

5.1 Perform import

Each import action consists of five consecutive steps, which will be explained in the following.

5.1.1 Step 1: Define import parameters

The first step requires selection of an address book containing the relevant data that is to be imported. By default, all address books specified according to the Notes settings will be shown.



Use the “Refresh“ button to activate the selected database and refresh the list of views.

Thereupon all available views from this address book will be shown in the corresponding field. Select a view which contains the documents to be imported.

Via the parameters “Import records as“, “Address from person document" and "Allow contact update from customer profile", you can influence the import as follows.

Import records as

By this parameter you can define what kind of document should be created from the imported data. Possible options include:

- *private person*
  All documents with a surname entry will be imported as private customers into the application GeoCom® Customer & Contacts. Records not disposing of a surname entry will be ignored.
- *company*
  From all records with an entry for company's name within the address book, customer profiles will be generated. Records not disposing of a company's name will be ignored.
- *company and contact*
  From all records disposing of a surname as well as a company's name, this option generates separate customer profiles with associated contact profile.
- *company and single contact or private person*
  Each record disposing of a company's name as well as a surname will be imported as customer profile with associated contact profile. Records disposing of a surname only will be imported as private customers.
- *company with multiple contacts or private person*
  This option will create the same import data as the above one, except for the fact that all contacts associated with the same company will be pooled within the same customer profile. Contacts are regarded as associated with the same company, if they dispose of the same company name and ZIP code and the city is either identical or not specified in both documents, or the ZIP code is not specified in both documents. The latter case also checks for identical or not specified values for city.
- *contacts of a selected company*
  In this case all specified entries will, if possible, be imported as contacts associated with a certain customer profile. After selecting the records which are to be imported, this option opens another dialog window in which you can specify an existing customer profile with which the documents are to be associated.

Address from person document

This selection field lets you specify which address from the import record should be used for generating the customer or contact profile. Possible values are:

- *preferably use company address fields*
  If a company address is available within the import record, it will be used for generating the customer or contact profile. If there is no such value, the private address entry will be used (if available).
- *preferably use private address fields*
  If a private address is given within the import record, it will be used for generating the customer or contact profile. If there is no such value, the company address will be used (if available).
- *use company address fields only*
  This option only allows the entry company address from the import data. If this entry is not specified within an import record, no address information will be entered into the customer or contact profile.
- *use private address fields only*
  This option only allows the entry private address from the import data. If this entry is missing within an import record, no address

information will be entered into the customer or contact profile.

5.1.2 Step 2: Selection of import records

When all general conditions for the import have been defined, click the OK button to reach step 2 of the import action.

In another dialog window, all entries from the previously selected view will be shown. Select the records to be imported by marking them with a selection tick, then click OK again.

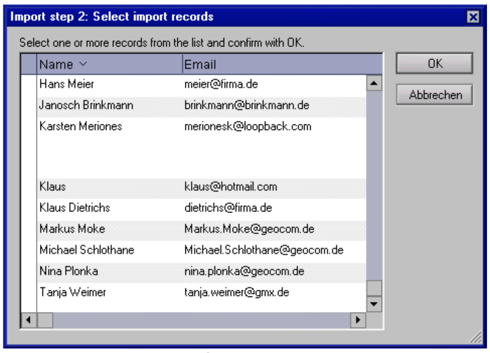


Illustration: Dialog Select import records

If you had previously selected the option *contacts of a selected customer*, yet another dialog will open in which you can select an existing customer profile for assignment.

Illustration: Dialog Select customer profile

Either way, you will then reach step 3 of the import.

5.1.3 Step 3: Evaluation of import records

The application automatically checks, whether the selected records can be imported using the specified import options. A dialog will inform you about the number of records that will be imported as private customers or customer profiles with contacts and about the number of records that cannot be imported at all.

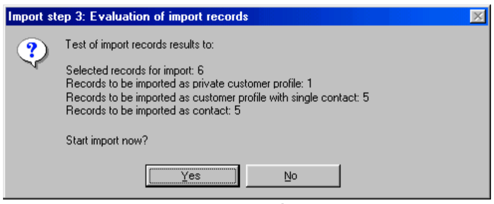


Illustration: Dialog Import Step 3

5.1.4 Step 4: Data import and summary

If you confirm the evaluation dialog with "Yes", the import will actually be performed in step 4.

After completing the import another dialog will be opened informing about the result of the import action.

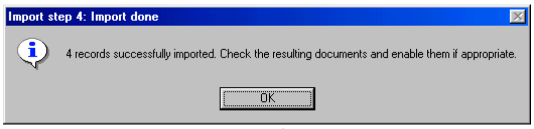


Illustration: Dialog Import Step 4

5.1.5 Step 5: Enabling imported records

The final step for an import action requires checking of the imported records for errors. If the records have been imported correctly, they can be enabled by selecting them and then using the corresponding

button. All selected documents will then be enabled and inserted into the normal application work flow.

5.2 Configuration

Within the section “Special configuration – language independent“ you can use the following parameter to limit import actions to a certain number of records:

IMPORTLIMIT:XX

Exchange XX by the upper limit of records that shall be imported. If you set this value to 0, any import action will be prohibited.

6 New / changed actions

The following actions have been newly integrated into the application, resp. have been modified in the particularized way.

6.1 New action: Sort documents in views

With the action “Modify sort order“ the sort order of certain documents within the views can be arbitrarily defined. By using this action the following document groups can be affected:

- all customer profiles of a certain customer
- all project profiles of a certain customer
- all contacts of a certain customer or private customer

Select either a customer profile, a project profile or a contact document of a certain customer and select from menu:

Selected documents – Modify sort order

The following dialog appears, which shows all corresponding documents (either customer, project or contact profiles) of that customer:

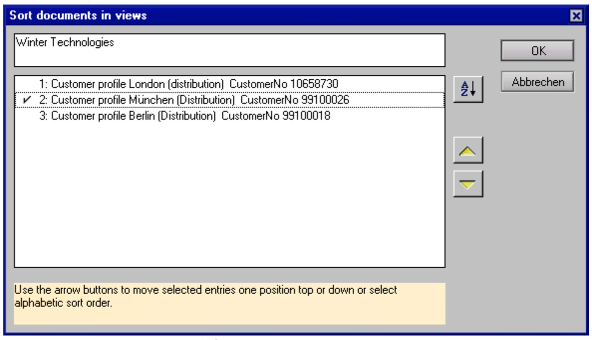
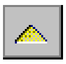
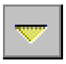
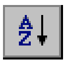


Illustration: Dialog “Sort documents in views“

You can now arbitrarily sort these documents by selecting the desired document(s) and moving them up or down via the arrow buttons.

You can easily shift multiple documents at a time by simply selecting them all together (mark them with a tick).

By using the alphabet button you can automatically sort the documents by alphabet. In case of contact profiles, sorting will be done by surname first, then given name.

The sort order specified herein will be kept within all views “Activities“.

6.2 New action: Send e-mails (mass mailing)

In view "Mass Mailings... c. mass mailing" an action for sending e-mails that have not been sent yet has been added. Select the e-mail messages you want to send and then select from menu:

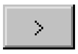
Actions – Selected documents – Send e-mails

The specified e-mails are will be sent and provided with the proper send date.

In case you have also selected documents, that have already been sent (i.e. which already have a send date), an error message will be shown and the sending process will be aborted. This action, thus, cannot be used to re-send e-mails.

6.3 Send mass mailing e-mail: Select all

Upon selecting, which recipients should receive the e-mail as copy or blind copy, a "Select all" function is availlable now.



To move all addresses to the CC or BCC field, click the "Move" button without selecting any documents. Thus, all documents will be selected automatically and can be moved all at once.

6.4 Sub categories for customer status

Within the global configuration document, section "Customer profile", you can now define sub categories for the field "Customer status".

With a backslash "\" you can separate main- and sub category. Sub categories will be shown hierarchically in corresponding views.

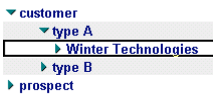


Illustration: Customer status with sub category

6.5 Modify customer or contact profiles: Append or replace value

The action

Selected documents – Modify customer or contact profiles

has been altered in order to allow appending entries to existing values.

You can now freely specify, whether you want to append the given value to the field, or to replace the existing value with the new one.

This action, however, cannot be used to empty fields any more. If a field is emptied, no changes to the corresponding field will be made.

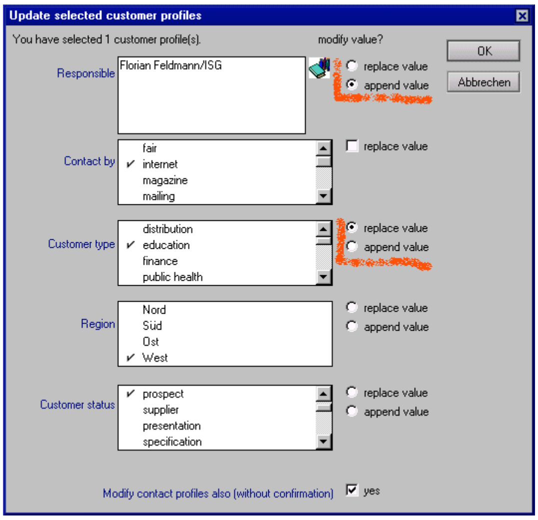


Illustration: Dialog “Update selected customer profiles“

In the above example the specified name will be appended to the field “Responsible“, i.e. the existing entries will remain intact.

The customer type, however, will be replaced by the value “education“, regardless of prior values which will be replaced.

6.6 Setting re-submission: Send notification e-mail

The dialog form for creating a re-submission entry has been extended by an e-mail function.

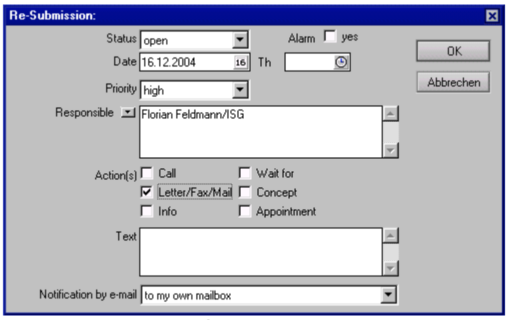


Illustration: Dialog Setting re-submission

Corresponding configuration settings provided, you can now prepare an e-mail notification instead of (or in addition to) an alarm message, which will be sent at the time given in the re-submission entry.

Via the field “Notification by e-mail“ you can select to whom a predefined e-mail should be sent (the contents can be defined within the global configuration document). Possible values are:

- **no**
  In this case, no e-mail will be sent.
- **to my own mailbox**
  This option sends an e-mail to the creator of the re-submission entry only.
- **to all responsible persons**
  In this case the mail will be sent to all persons provided within the field “Responsible“.
- **to my own mailbox and to all responsible persons**

This option sends an e-mail to all persons provided within the field “Responsible“ as well as the creator of the re-submission entry, in case the creator is not a responsible himself.

7 Bug fixes

The following errors have been repaired in GeoCom® Customer & Contacts 6.0 Build 254.

7.1 New customer profile and usage of customer IDs

Upon creating a new customer profile when using the option “Create serial number“ the serial number created for this customer was not shown in the corresponding views until the document had again been opened and saved.

This error has been fixed in version 254.

7.2 Postal Address / Letter Salutation / Longname in customer profiles

The texts for postal address, letter salutation as well as longname were only built regarding the internal definitions.

This error has been fixed in version 254, the corresponding tags are now, if possible, created from definitions within the configuration document.

7.3 View “Activities.. f. Categories“

The view “Activities.. f. Categories“ accidentally showed templates as well as normal documents.

This error has been fixed in version 254.

7.4 Folder “Re-submission... d. with context“

Users disposing of the role [Lan-uk] had access to their usual views as well as the folder “Re-submission... d. with context“.

This error has been fixed in version 254, the folder can now only be accessed by users disposing of the role [ViewTickler-uk].

This error did not affect users disposing of german access rights.