User Manual

Using Your Documentation

The following documentation is included with Relata to help you effectively use the product. Please read and use the manual according to your requirements.

User's Manual

This manual offers detailed information on using Relata. Read this manual to understand how the various components of Relata work and to also get a better understanding of how this application can suit your needs.

Refer to this manual should you have any problems using Relata.

System Requirements

The following are requirements for Relata:

- Current browser: Internet Explorer 5.0 or better; Mozilla 0.9.6 or better; cookies enabled
- Web server: Apache 1.3.12 or better; MS Internet Information Server 4.0
- PHP: 4.0.x; 4.1.x recommended
- Database server: MySQL 3.23.x, PostgreSQL 7.0.x/7.1.x
- OS: Linux 2.2.x or better; MS Windows NT/2000/XP, MacOS X

Contents of This Manual

This manual describes how the various components of Relata work. To get the most out of Relata, please read this manual carefully before using Relata.

Table of Contents

Chapter 1
Introduction

Relata is a CRM platform that currently features a sales force automation module, with additional CRM modules currently being developed. Relata has user and administrative interfaces. Being web-based, the interface for Relata is a current version of a standard web-browser.

The Relata source code is released under the GPL, and makes use of the programming languages PHP and Javascript. We have chosen to use Javascript and PHP because our development team believes in making our source code accessible to as broad an audience as possible. Both Javascript and PHP have a rapidly growing developer base because of their ease of use.

We have made Relata completely web-based in order that it may be run without having to install special client software – something of specific value to IT managers who want to deploy Relata in an organization with many users.

Relata allows you to manage your contacts and accounts from one integrated web interface. Sales professionals can use Relata to organize and manage their customers and accounts with ease and powerful functionality.

Relata is highly scalable and is appropriate for use in the enterprise.

Relata can be customized to run with any SQL database.

Using Relata, you have the power to create custom fields, manage sales opportunities, associate your contacts with various categories (groups) – e.g. 'Computer Salespeople'. By adding this functionality, Relata allows you to perform rapid queries on key variables, communicating with your contacts in a more targeted and efficient capacity. You can send email to your specific groups simultaneously with important information - saving you from emailing each contact individually.

Relata allows you to track responses to outgoing emails, should you decide to conduct an email marketing campaign.

Relata also records and tracks all your communications with your contacts, giving you a more precise history of each relationship, allowing you to extract more information and value from your database.

With built-in support for opportunities, users are able to avoid losing out on potential sales. Easily associate a particular contact with an opportunity using point-and-click functionality. You can keep track of the various sales stages associated with a sale and the probability of a sale with ease.

Relata also allows you to better organize and prioritize your short-term and long-term activities using the to-do and calendar features. You can plan ahead with Relata: enter events or to-do items ahead of time and print out your daily to-do schedule and calendar whenever you require it.

Palm and Visor users will find RelataSync of interest. RelataSync seamlessly integrates with Relata. RelataSync is a Palm HotSync Manager conduit written in the Java programming language. RelataSync is designed to be run from a local workstation instead of over the web, due to browser security restrictions. RelataSync allows you to synchronize contacts from Palm's Address Book with Relata's Contact Manager and vice versa. You can also synchronize activity and to do list data from Palm’s Date Book and To Do List with Relata’s Activity Manager and vice versa.

Relata and RelataSync are free.

We hope you enjoy Relata as much as we did creating it.

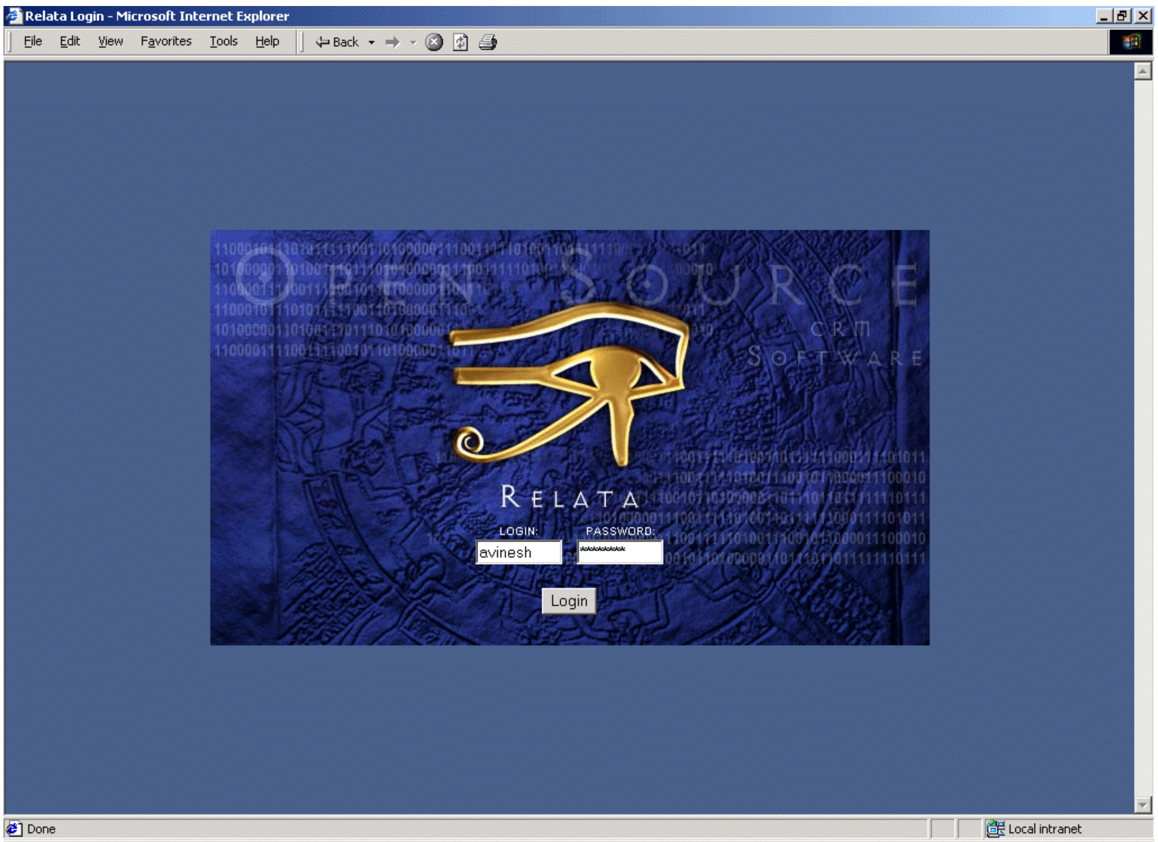
?? Team Stratabase

Chapter 2
Using Relata

This chapter of the manual explains how to use Relata. Please read this part of the manual if you are new to Relata, reading it will help you become familiar with the different features this product offers. This section assumes that Relata has been successfully installed and configured on the server.

2.1 Logging In

Upon accessing Relata, you will be presented with the Relata login page:

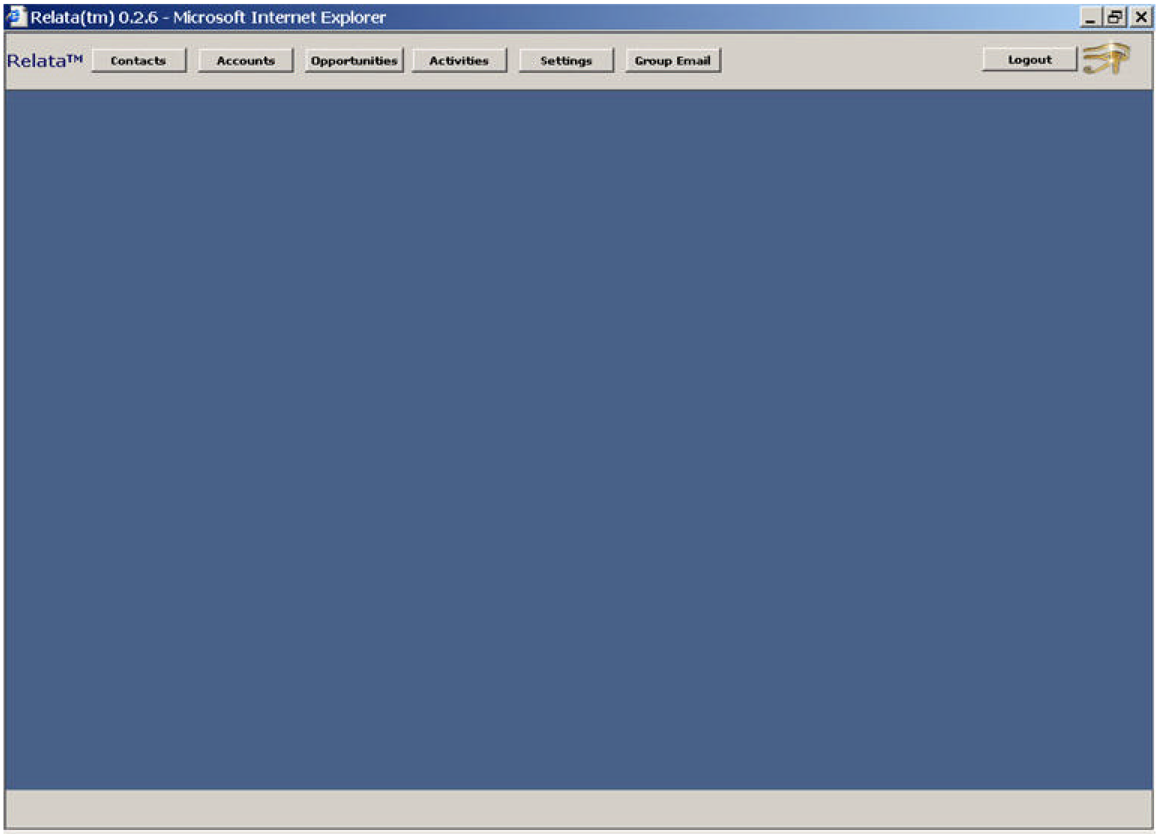


Enter your login name and also your password and click on the ‘Login’ button to login.

If you cannot log in, you have specified an incorrect login and/or password. If the problem persists, contact the Relata administrator who can reset your account login and/or password.

2.2 Relata Desktop

Upon logging in to Relata, you will be presented with the Relata desktop:



The Relata desktop is embedded in a browser window and runs from there.

2.2.1 Relata Menu Bar

Along the Relata menu bar, you will see seven buttons:

Button	Description
Contacts	Used to add/view/edit/delete contacts (Contact Manager)
Accounts	Used to add/view/edit/delete accounts and also to associate contacts with accounts (Account Manager)
Opportunities	Used to add/view/edit/delete opportunities (Opportunity Manager)
Activities	Used to add/view/edit/delete activities (Activity Manager)
Settings	Used to add/view/edit/delete groups and add/view/edit/delete custom fields
Group Email	Used to email multiple contacts in a group at once

Logout	Used to log out of the current user session

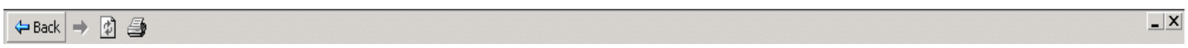
At the far right of the menu bar, there is an animated Stratabase logo that will pause momentarily if a page is loading. Please be patient if you have a large list of contacts.

2.2.2 Relata Task Bar

At the bottom of the Relata desktop you will see the grey task bar, which is used to switch between active Relata windows.

In the above screenshot, you would simply left-click on 'Contact Manager' button with your mouse to maximize the 'Contact Manager' window.

2.2.3 Relata Tool Bar



Once you click on one of the menu bar buttons, Relata will open a new window that has a tool bar like the one above, immediately below the Relata menu bar.

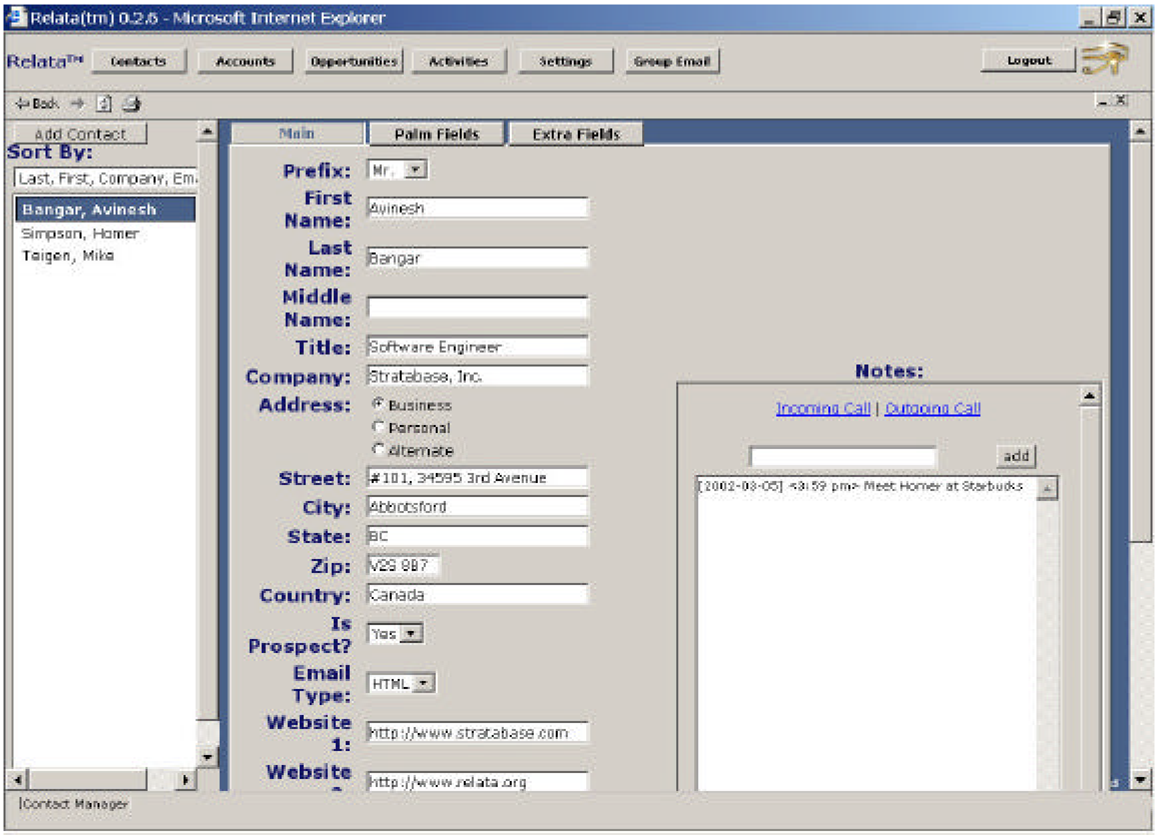
There are four buttons on the left and two on the right. A description of them follows, in their respective order of appearance, from left to right:

Button	Description
Back	Used to go back a contact/account/activity
Forward	Used to go forward a contact/account/activity
Refresh	Used to refresh the current frame
Print	Used to print a frame with contact/account/activity information
Minimize	Used to minimize a window so that you can click on a button in the task bar to maximize it (far right)
Close	Used to close an open window (far right)

Once you feel that you are comfortable with Relata's intuitive interface, you can begin utilizing Relata for your organization. In the next chapter, we will look at managing contacts.

Chapter 3
Contact Manager

Upon clicking the 'Contacts' button on the Relata menu bar, you will be presented with the contact manager:



In the screenshot above, a number of contacts have already been entered into the Relata contact manager.

Contacts are alphabetically sorted by their last name by default. Contacts can also be sorted by using their respective company name.

The left pane holds the names of your contacts, whose details can be brought up by clicking on their respective name. The right pane holds the contact's associated information such as their name, title, company, email address, and phone number. The right pane also has tabs across the top, labeled as such: Name, Palm, and Extra Fields – which are used to specify additional information about a contact.

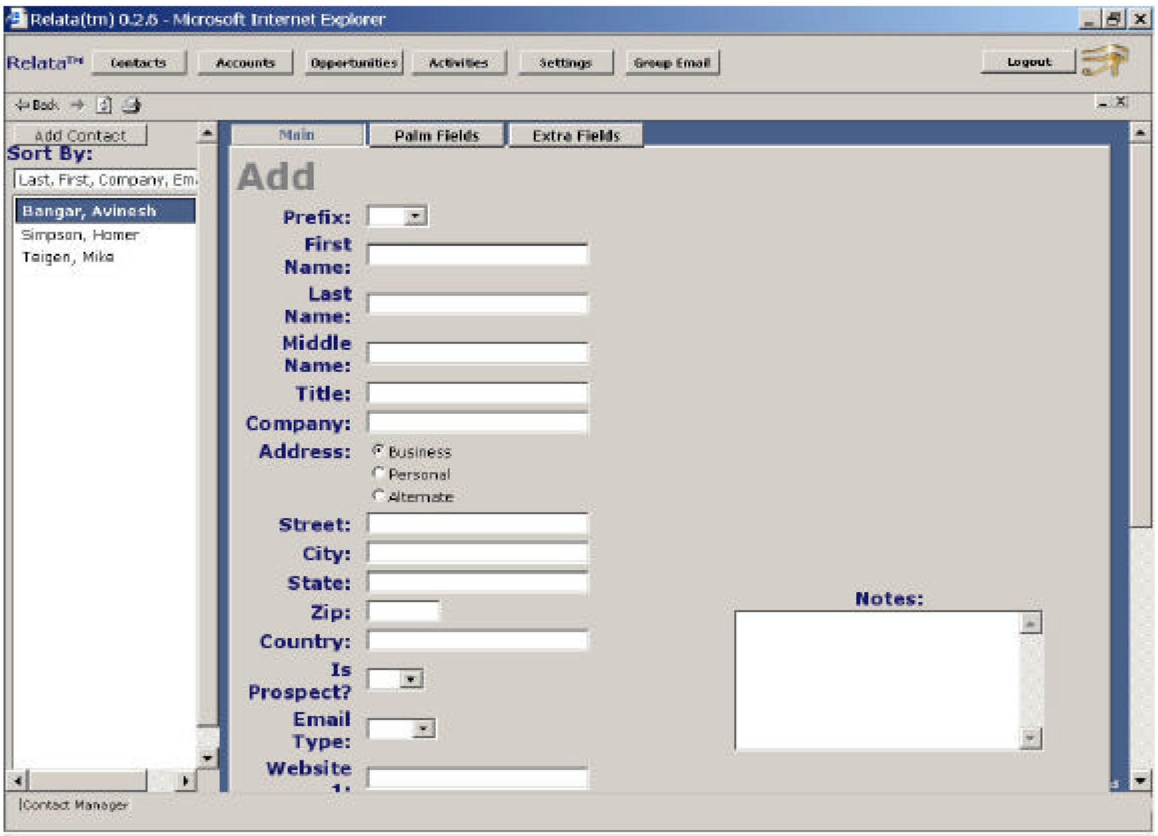
At the far right of the right pane, you will note a 'Notes' window. The 'Notes' window is used to keep track of incoming and outgoing phone communications with a particular contact. This will relieve the burden of remembering when you last called a contact to discuss business items.

We will look at managing contacts in detail in the following sections.

3.1 Adding a Contact

To add a contact, click on the 'Add Contact' button on the left pane.

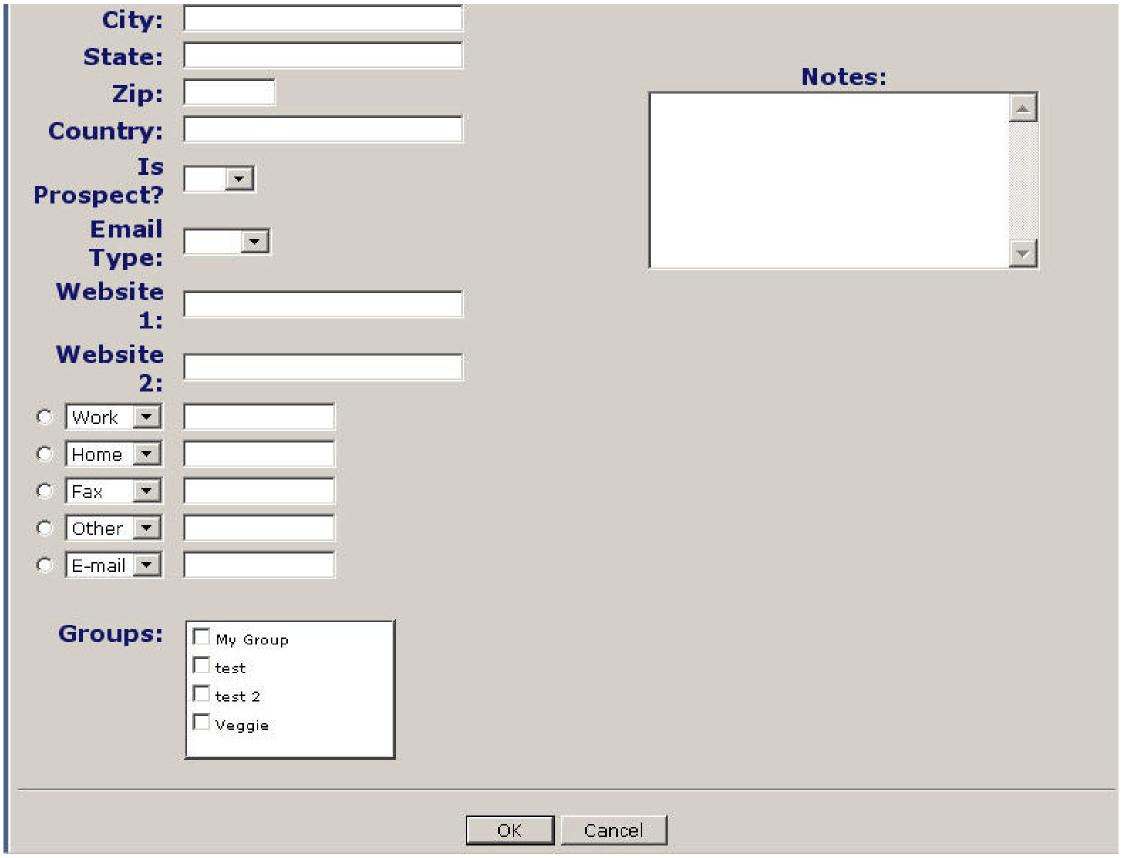
You will be presented with a blank form on the right pane, allowing you to fill in the contact's details:



Groups allow you to organize your contacts better, especially when you need to utilize Relata's Group Email functionality to email all members of a particular group. 'Groups' and the 'Extra Fields' are defined by clicking on the 'Settings' button on the Relata menu bar. Please see Chapter 7 for more details.

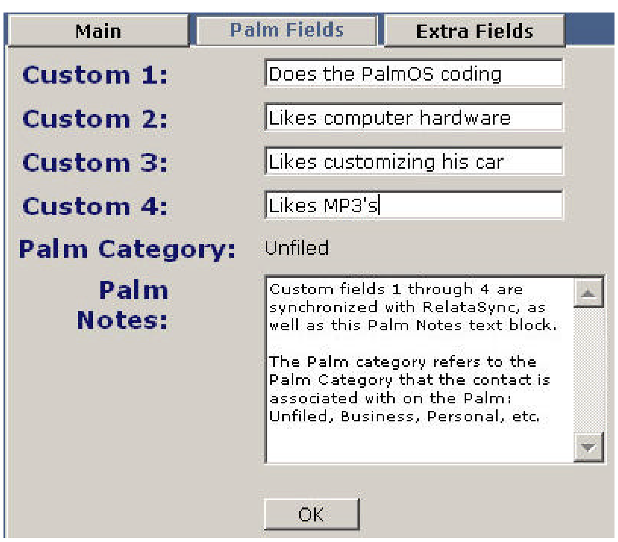
Fill in the contact's specifics and then finally scroll to the bottom of the page and click 'OK' to save the new contact record. Should you wish not to save the new record, click 'Cancel' instead, but you will lose all information that you have entered for that contact.

The bottom half the of 'Main' contact details page:



** Note: Only the business address of the contact will be synchronized with your Palm Address Book when performing a Palm HotSync using RelataSync.

Next, we will look at the 'Palm' tab:



‘Custom 1’ through ‘Custom 4’ are custom fields in the Palm that can be used to store additional details about a contact. The ‘Palm Notes’ field is a memo field that allows you to enter more details about a particular contact – such as times when a contact is available.

Click ‘OK’ to save any changes.

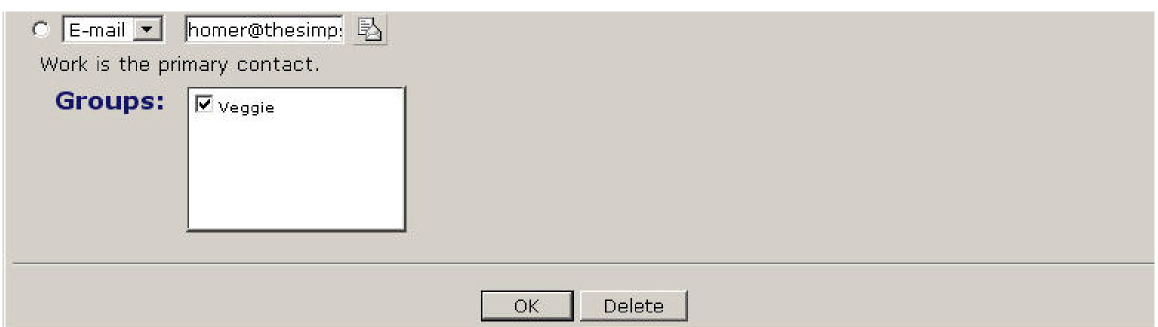
Finally, we will look at the ‘Extra Fields’ tab:

‘Extra fields’ are not synchronized with your Palm, but can be used to store other particulars about a contact. Extra fields are entered into Relata by clicking on the ‘Settings’ tab on the Relata menu bar.

Click ‘OK’ to save the extra fields.

3.2 Deleting a Contact

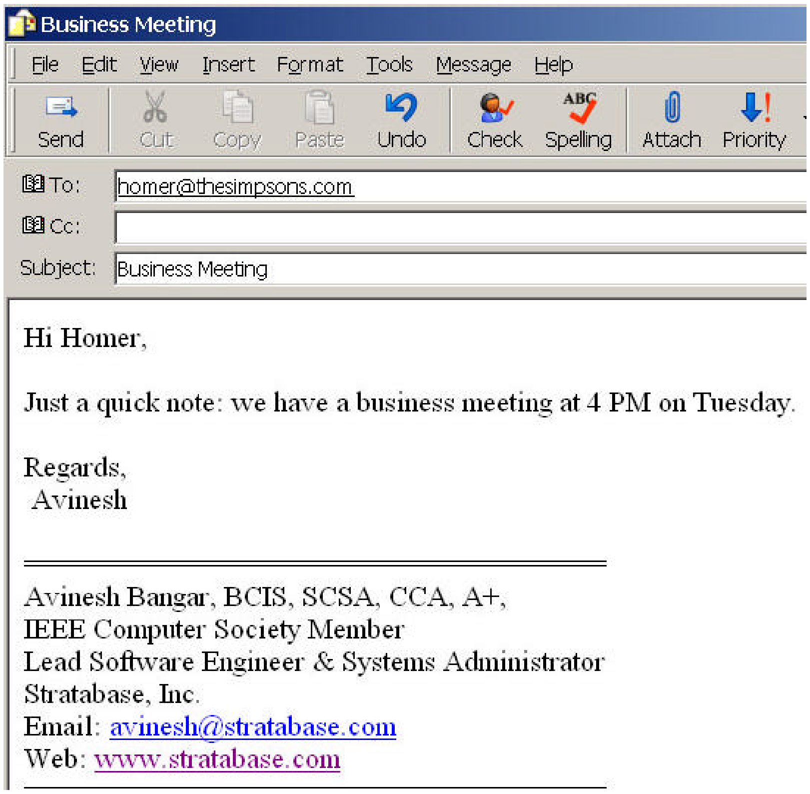
If you are viewing a record that has already been saved, then the ‘Cancel’ button will read ‘Delete’:



For the above contact, you would simply click ‘Delete’ to delete the contact.

3.3 Emailing a Contact

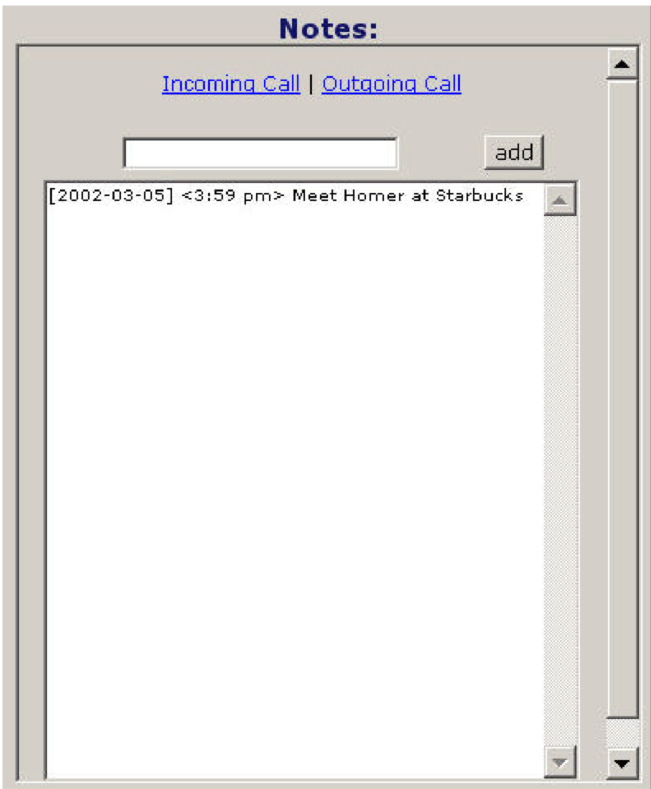
If you look at the previous screenshot you will note that there is a button with a letter and an envelope immediately to the right of the 'E-mail' text field. Click the button to email to launch your email client to email that particular contact:



3.4 Phone Communications

In the event you receive a phone call from a contact or even call a client, you can keep track of all incoming and outgoing communications with that client.

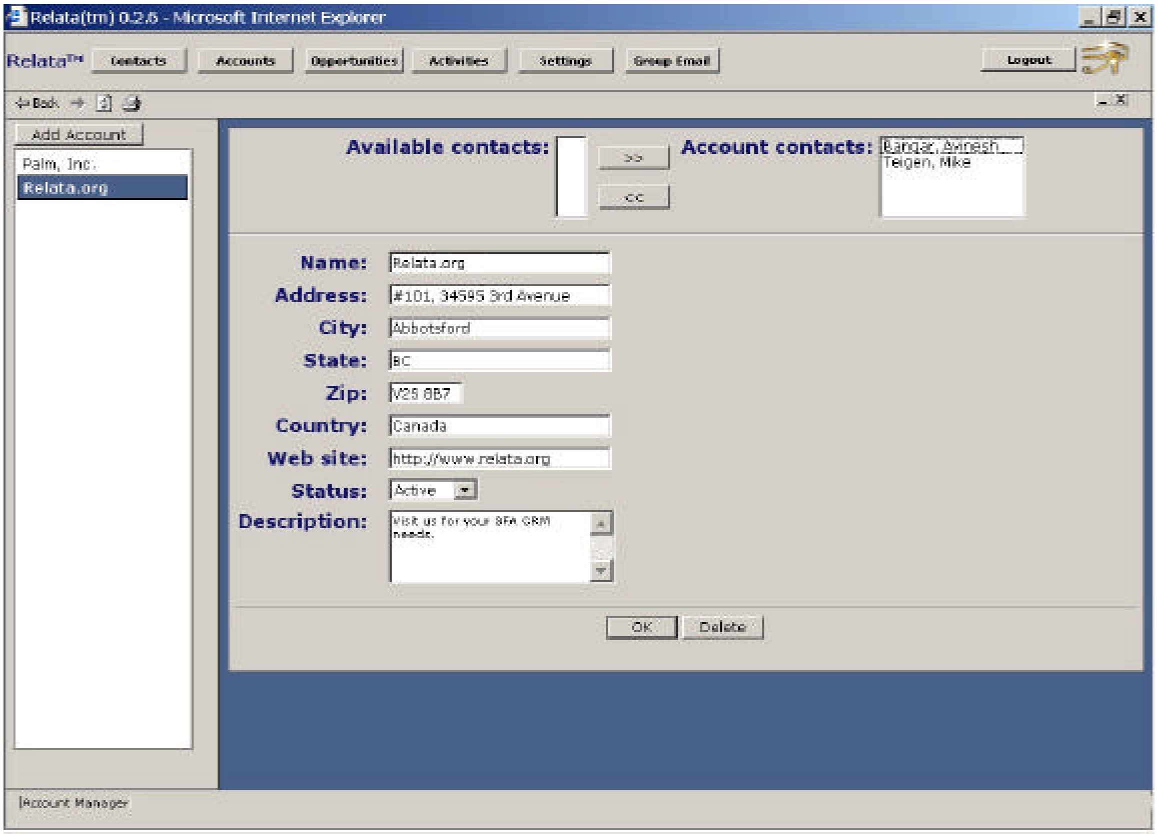
To keep notes about an incoming or outgoing call, first select a contact. Once the right pane has been updated with the contact's details, you will notice the following 'Notes' area:



For an incoming call, click 'Incoming Call' and then begin to enter any information you feel is important regarding the call and click 'add'. It will be listed as: "[YYYY-MM-DD] <HH:MM am/pm> ~~~~ Incoming Call ~~~~" The oldest events will be pushed down as newer ones will occupy the top portion of the window (FIFO). For an outgoing call, click 'Outgoing Call'.

Chapter 4
Account Manager

Upon clicking the ‘Accounts’ button on the Relata menu bar, you will be presented with the account manager:



In the screenshot above, a number of accounts have already been entered into the Relata account manager.

Accounts are alphabetically sorted by the organization’s name.

The left pane holds the names of your accounts, whose details can be brought up by clicking on the respective account name. The right pane holds the account’s associated information such as the contacts associated with the account, the address, website, status (Active, Inactive, Other), and description.

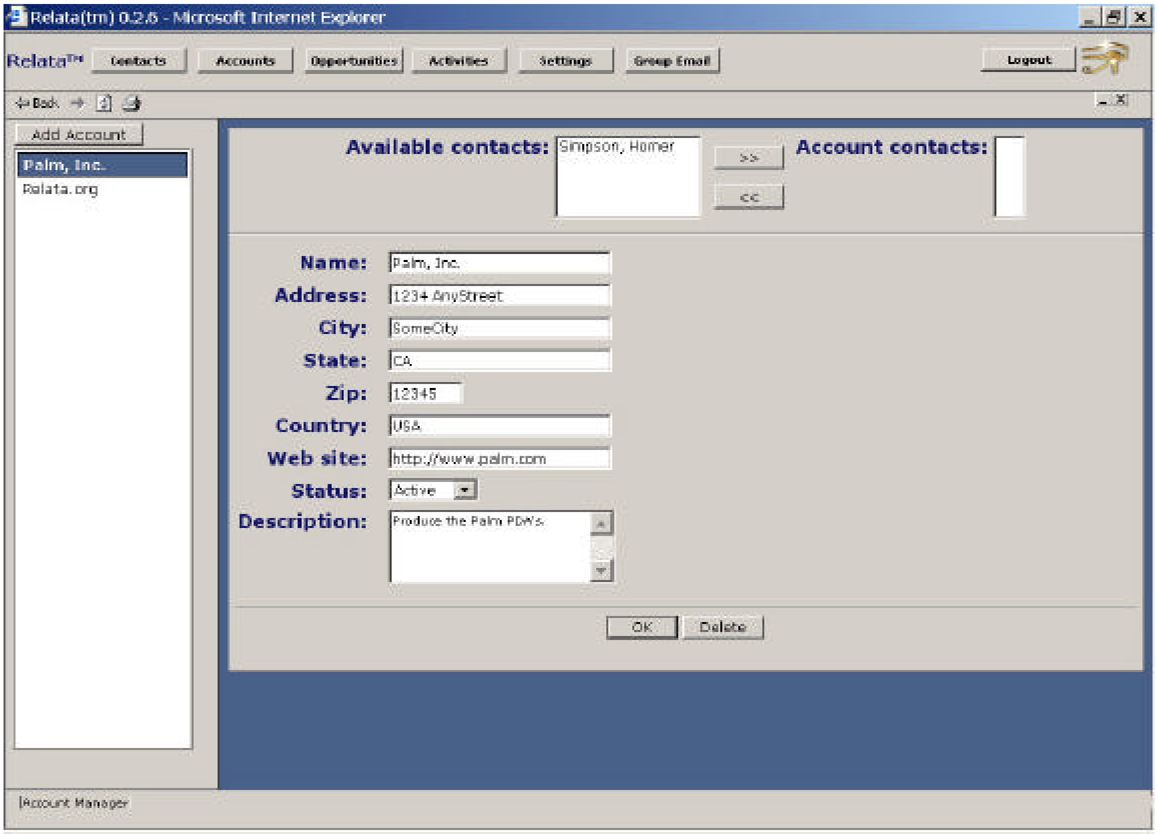
A contact can be associated any given account, but an account can have multiple contacts. For the example above, ‘Avinesh Bangar’ and ‘Mike Teigen’ are the account contacts. ‘Avinesh Bangar’ was selected and then the ‘>>’ button was used to move ‘Avinesh Bangar’ into the ‘Account contacts’ window. The same method was utilized to add ‘Mike Teigen’ to the ‘Account contacts’ window.

We will look at managing accounts in detail in the following sections.

4.1 Adding an Account

To add an account to the accounts manager, click on the 'Add Account' button on the left pane.

You will be presented with a blank form on the right pane, allowing you to fill in the account's particulars:



Note in the screenshot above that no contacts have been associated with the account yet. To associate a contact with an account, click on the contact (from the 'Available contacts' window) and then click on the '>>' button to move the contact into the 'Account contacts' window:

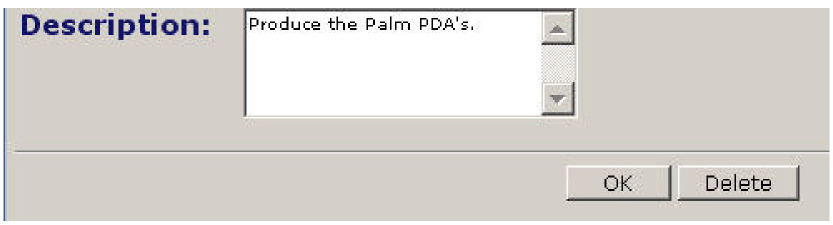
In the example above: 'Homer Simpson' has been associated with the 'Palm, Inc.' account.

Finally click 'OK' to save the account and update the left pane with the account name:

As shown above, 'Palm, Inc.' has been added to the left pane of the account manager.

4.2 Deleting an Account

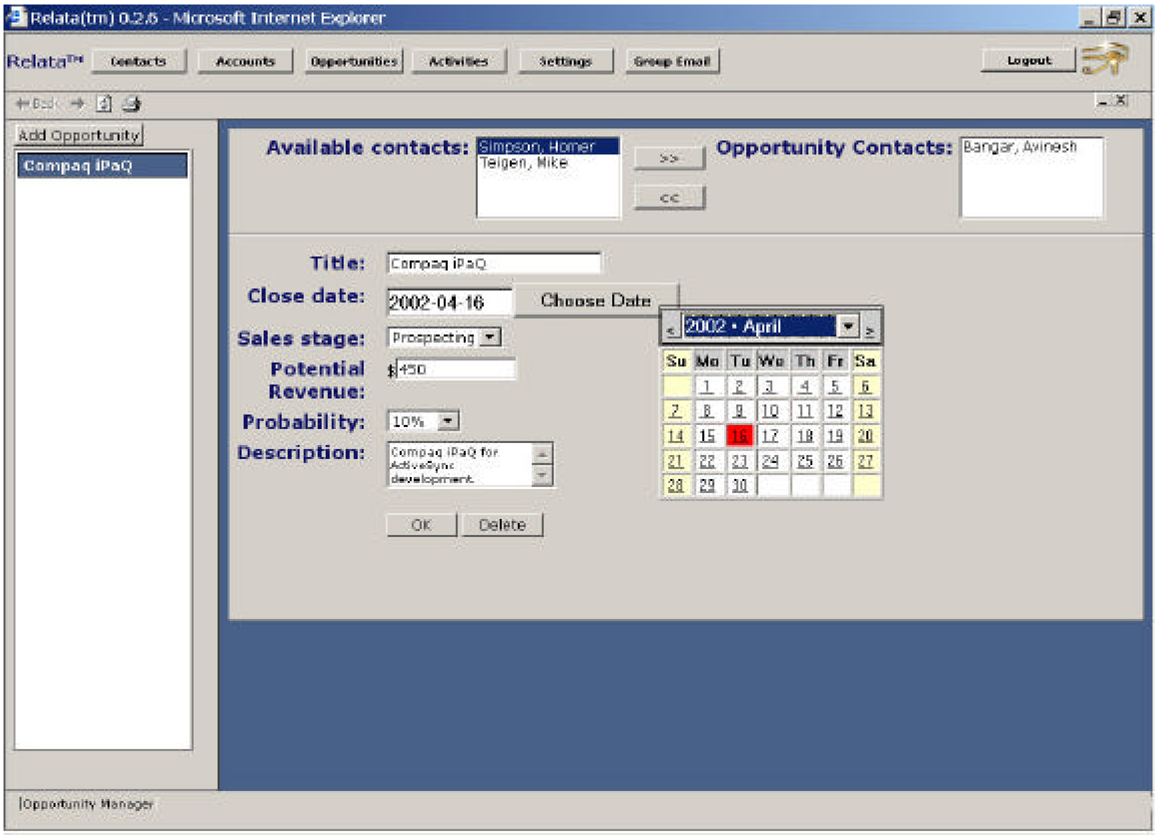
If you are viewing an account that has already been saved, then the 'Cancel' button will read 'Delete':



Simply click 'Delete' to delete the account record.

Chapter 5
Opportunity Manager

Upon clicking the ‘Opportunities’ button on the Relata menu bar, you will be presented with the opportunity manager:



In the screenshot above, an opportunity entitled ‘Compaq iPaQ’ has been entered. Clicking ‘Choose Date’ reveals a popup calendar.

Opportunities are alphabetically sorted.

The left pane holds the titles of the opportunities. The right pane holds the opportunity’s associated details such as the associated contact, the title, the close date, and the probability of the sale.

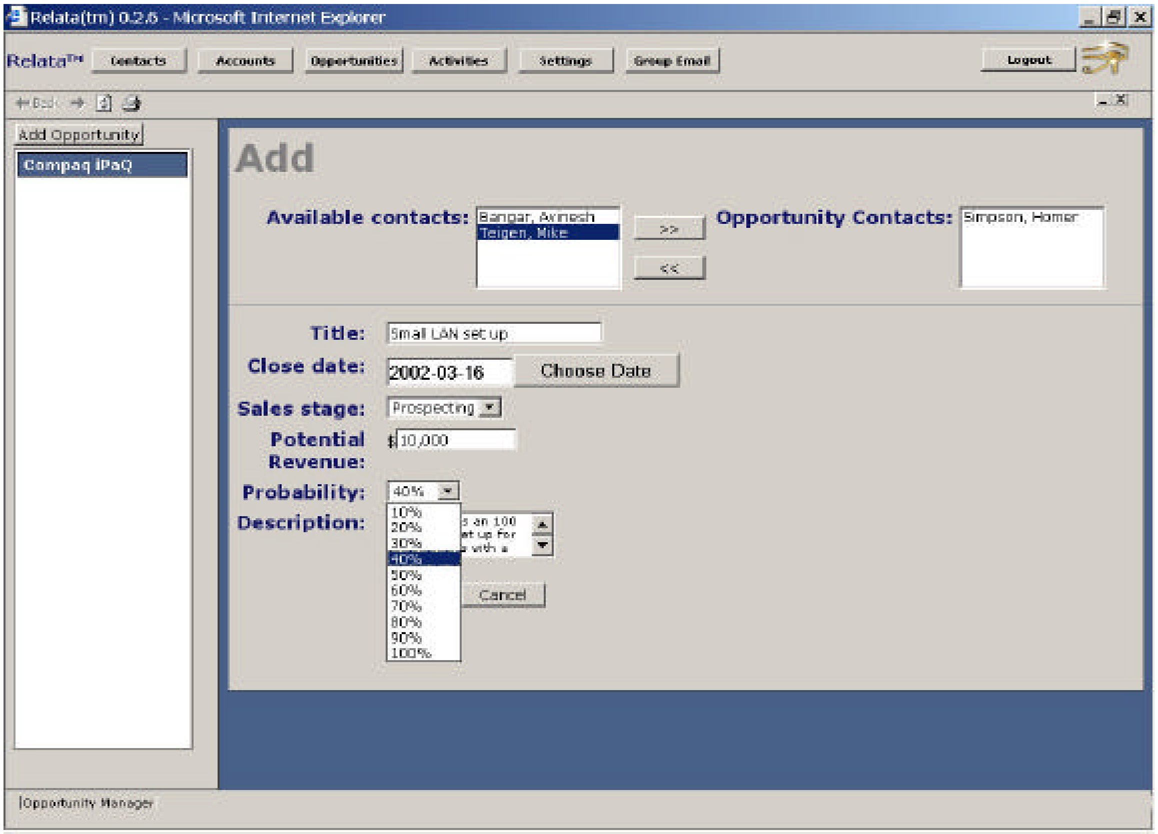
An opportunity can be associated with multiple contacts, but each contact can be associated with a single opportunity. In the example above, ‘Avinesh Bangar’ was selected as the contact associated with the ‘Compaq iPaQ’ opportunity.

We will look at managing opportunities in detail in the following sections.

5.1 Adding an Opportunity

To add an opportunity to the opportunities manager, click on the 'Add Opportunity' button on the left pane.

You will be presented with a blank form on the right pane, allowing you to fill in the opportunity's particulars:



In the screenshot above, a new opportunity entitled 'Small LAN set up' is being created and assigned to 'Homer Simpson'. The close date of the opportunity is March 16, 2002 with potential revenue being $10,000.

After all the details have been entered, click 'OK' to save the opportunity. After you click 'OK', the title of the opportunity will be added to the list of opportunities in the left pane:

As shown above, 'Small LAN set up' has been added to the left pane of the opportunity manager.

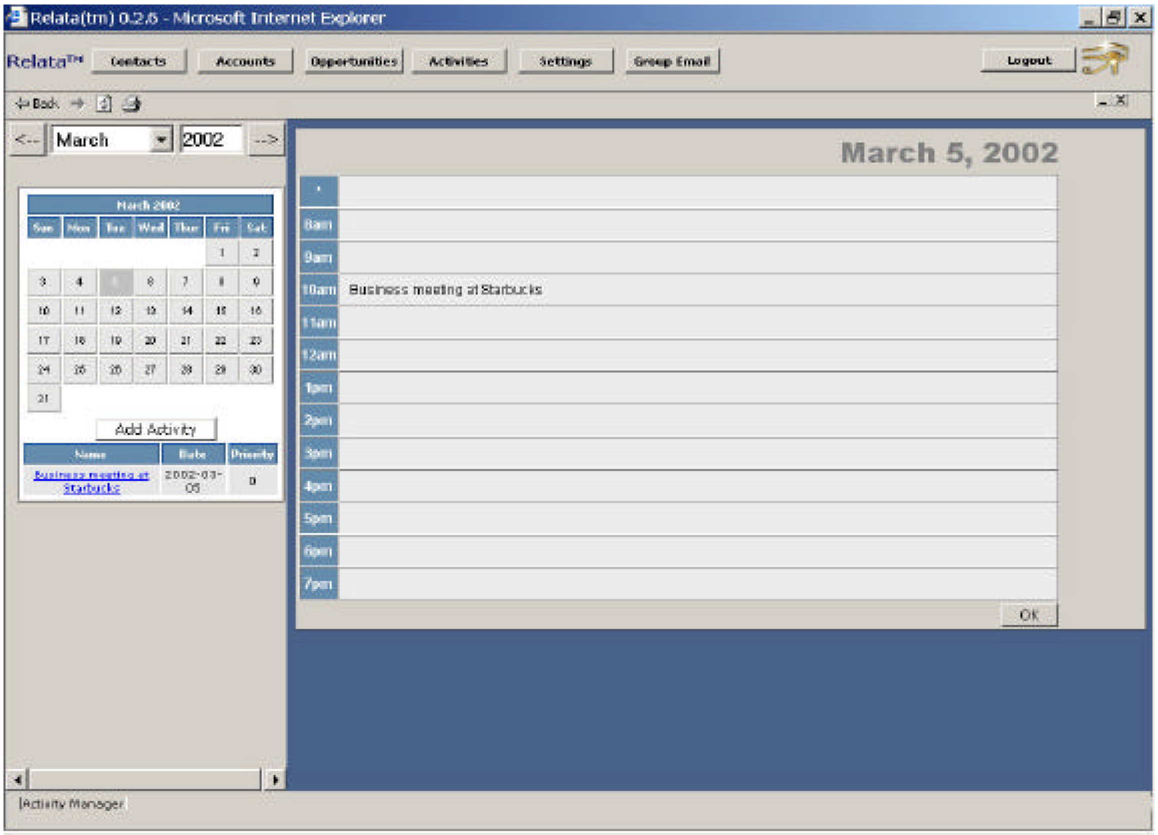
5.2 Deleting an Opportunity

If you are viewing an opportunity that has already been saved, then the 'Cancel' button will read 'Delete':

Simply click on 'Delete' to delete the opportunity.

Chapter 6
Activity Manager

Upon clicking the ‘Activities’ button on the Relata menu bar, you will be presented with the activity manager:



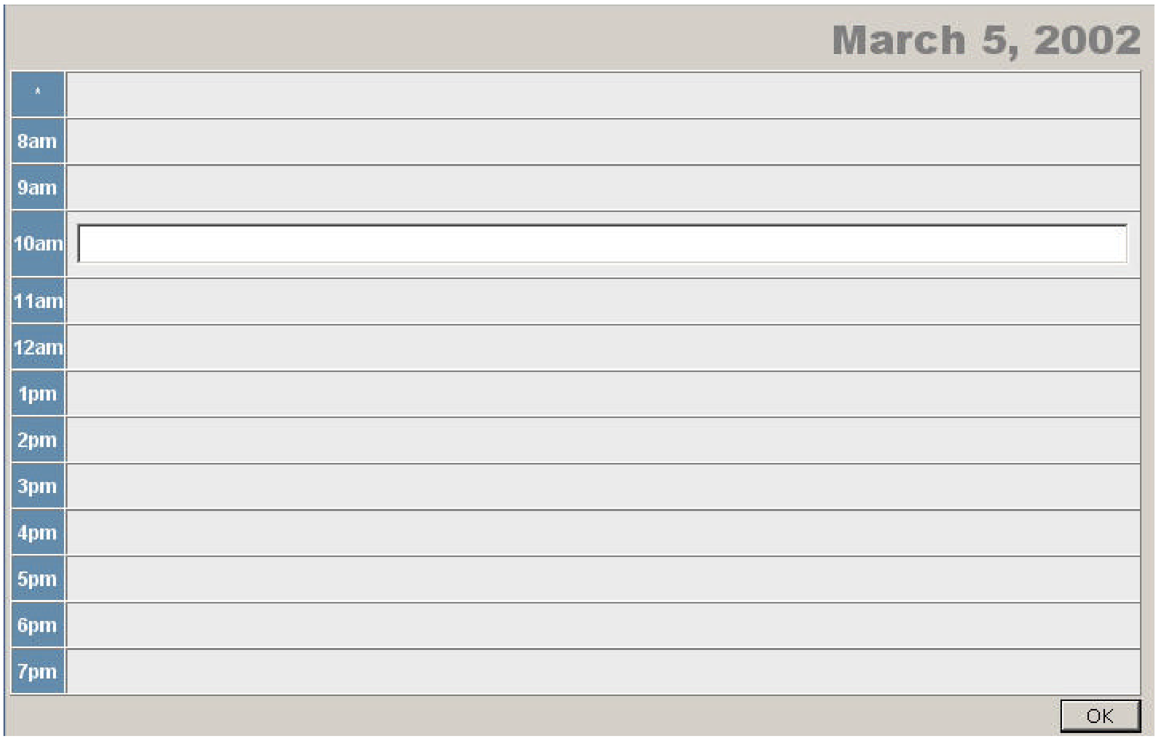
In the screenshot above, a sample activity has been entered.

The top of the left pane features left and right buttons to update the calendar view for the current month. Alternatively, you can also select a month manually by using the drop down menu. You can also change the current year by changing the year field. Once you select a particular day on the mini-calendar, the right pane will update with the activities/to do items for that day. The right pane will open up with your schedule for the current day.

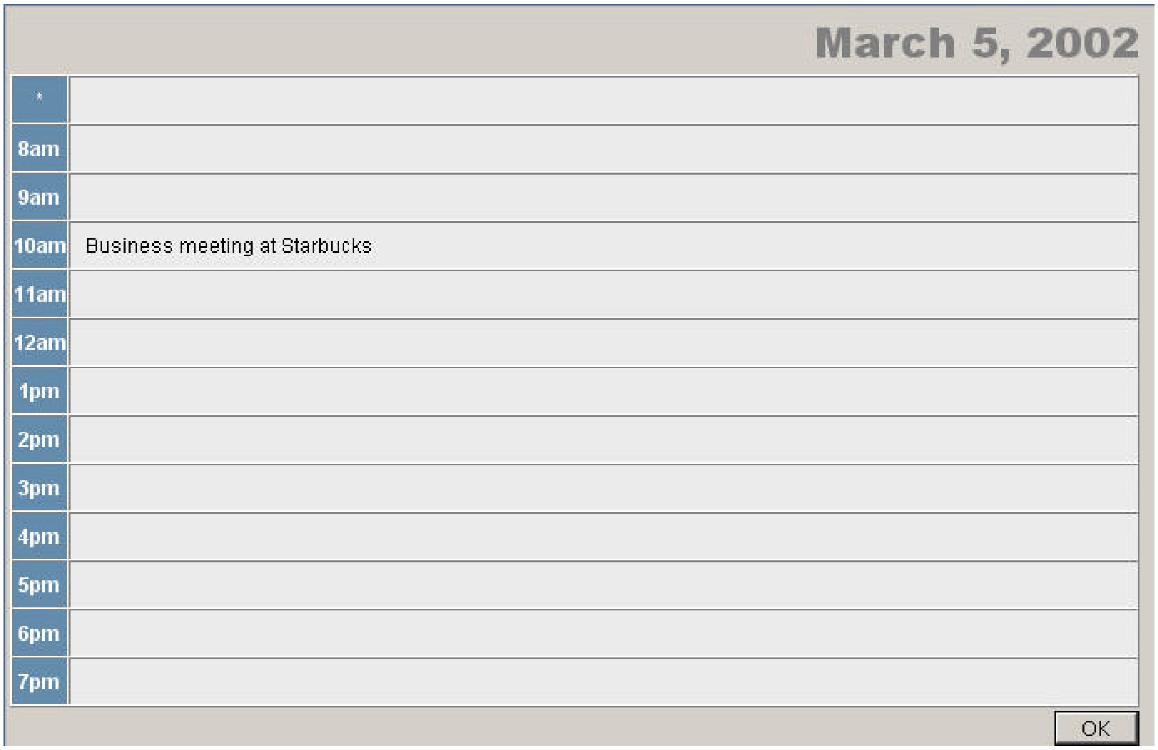
We will look at managing activities in detail in the following sections.

6.1 Adding an Event

To add an event entry into the right pane, simply left click to the right of an hourly time interval (ie. 10 am):

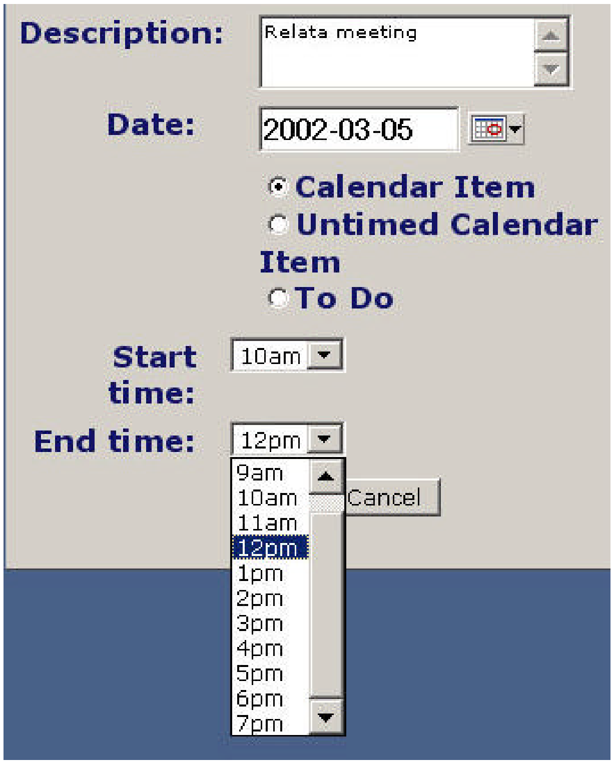


Now enter an event for that interval and then click outside of that time interval and click ‘OK’ to save:



Notice that the left pane is updated with the new event automatically, upon clicking ‘OK’:

To edit the event, simply click on the associated entry under the 'Name' column and you can edit the event's properties in the right pane:



Once you edit the event's specifics, click the 'OK' button to save changes.

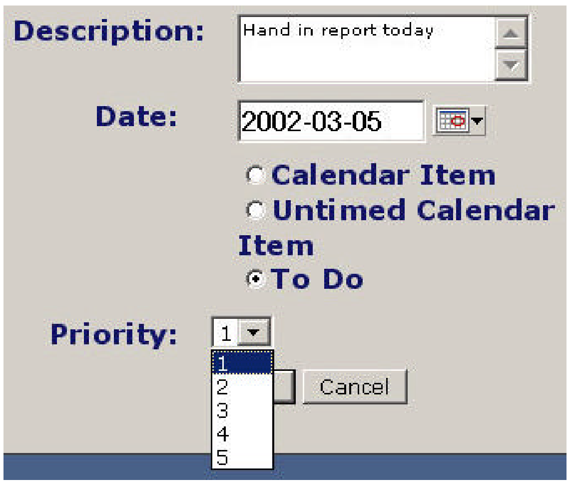
6.2 Deleting an Event

See above. Instead of editing an event, simply click on 'Delete' to delete the event/to-do entry.

6.3 Adding an Activity

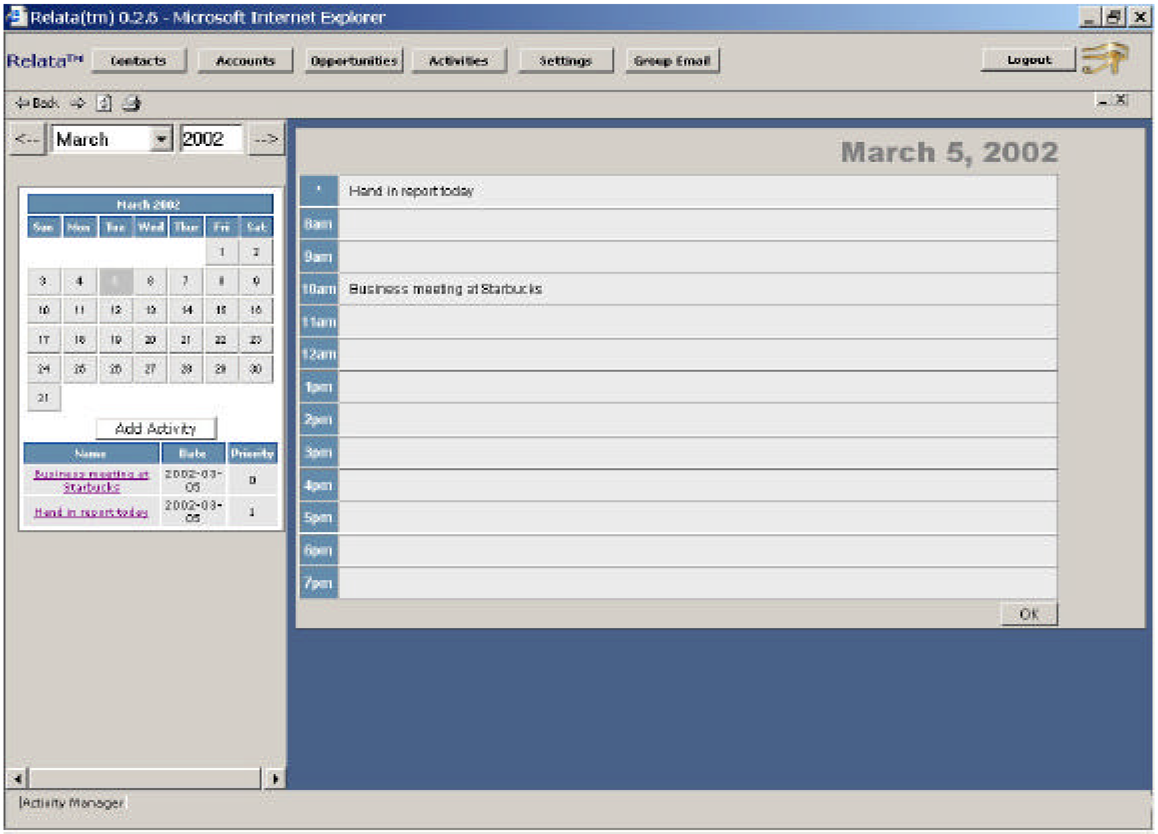
To add a new activity, click on the ‘Add Activity’ button on the left pane:

You will be presented with the following page in the right pane once you click on ‘Add Activity’:



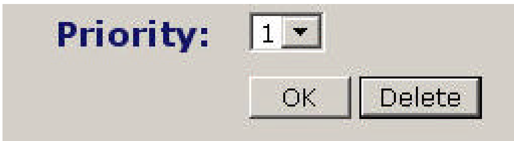
Once you finish entering the activity’s details, click ‘OK’.

Click ‘OK’ to save changes. The left and right panes will be updated with the new activity:



6.4 Deleting an Activity

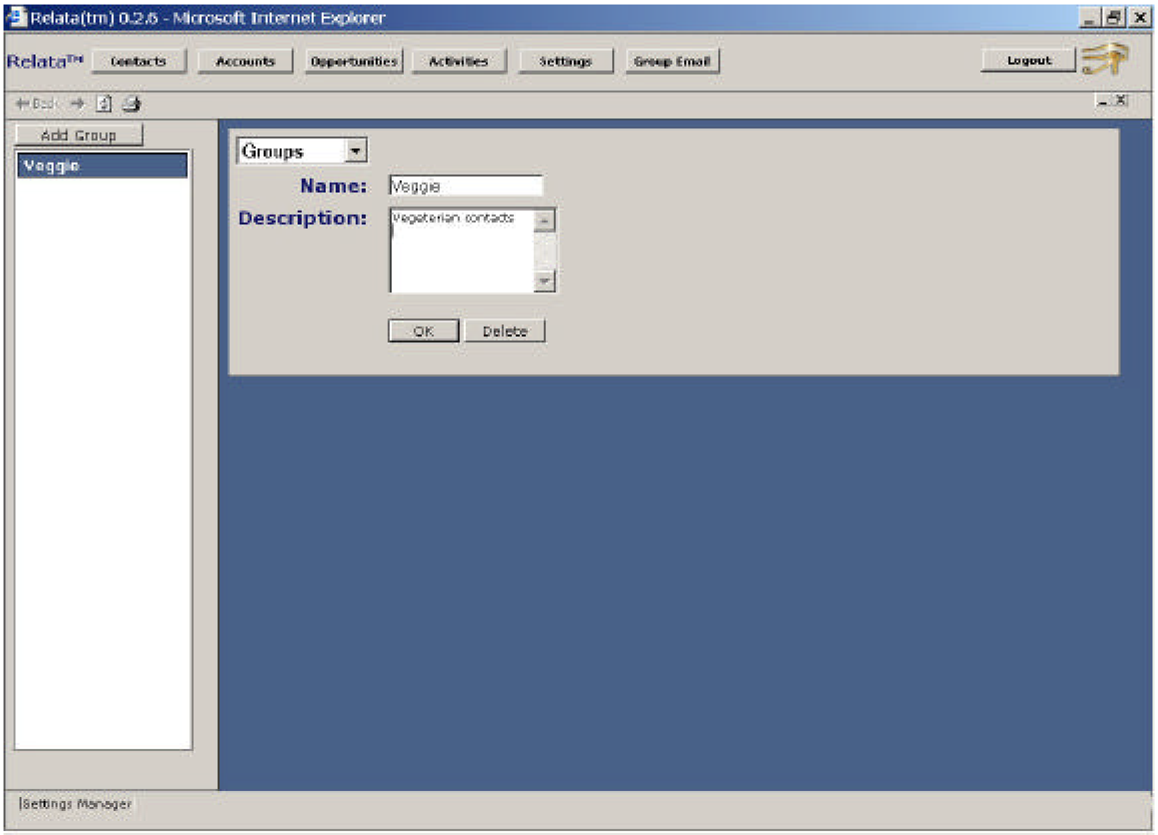
Select an activity to edit by selecting it in the left pane under ‘Name’. You will be presented with the following page, after clicking on the activity’s hyperlink:



Click on the ‘Delete’ button to delete the activity.

Chapter 7
Settings Manager

Upon clicking the ‘Settings’ button on the Relata menu bar, you will be presented with the settings manager:



The screenshot example above has one group added: ‘Veggie’.

The names of the groups are alphabetically sorted in the left pane and properties of the group or extra fields are edited in the right pane.

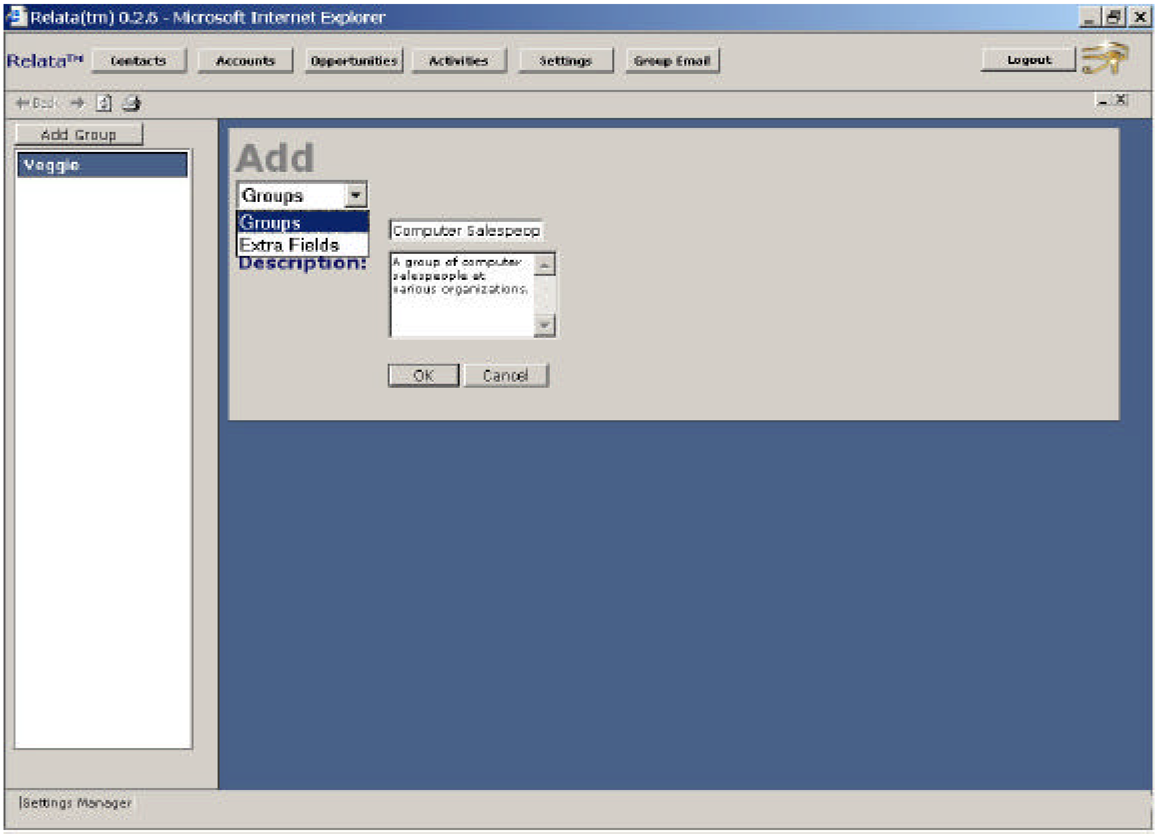
It is a good idea to put the contacts into groups for categorization purposes. Later, you can use the ‘Group Email’ manager to email multiple recipients of the same group simultaneously with promotions and other useful information.

Extra fields are used to capture additional information about contacts, such as their ICQ number or best time for a meeting.

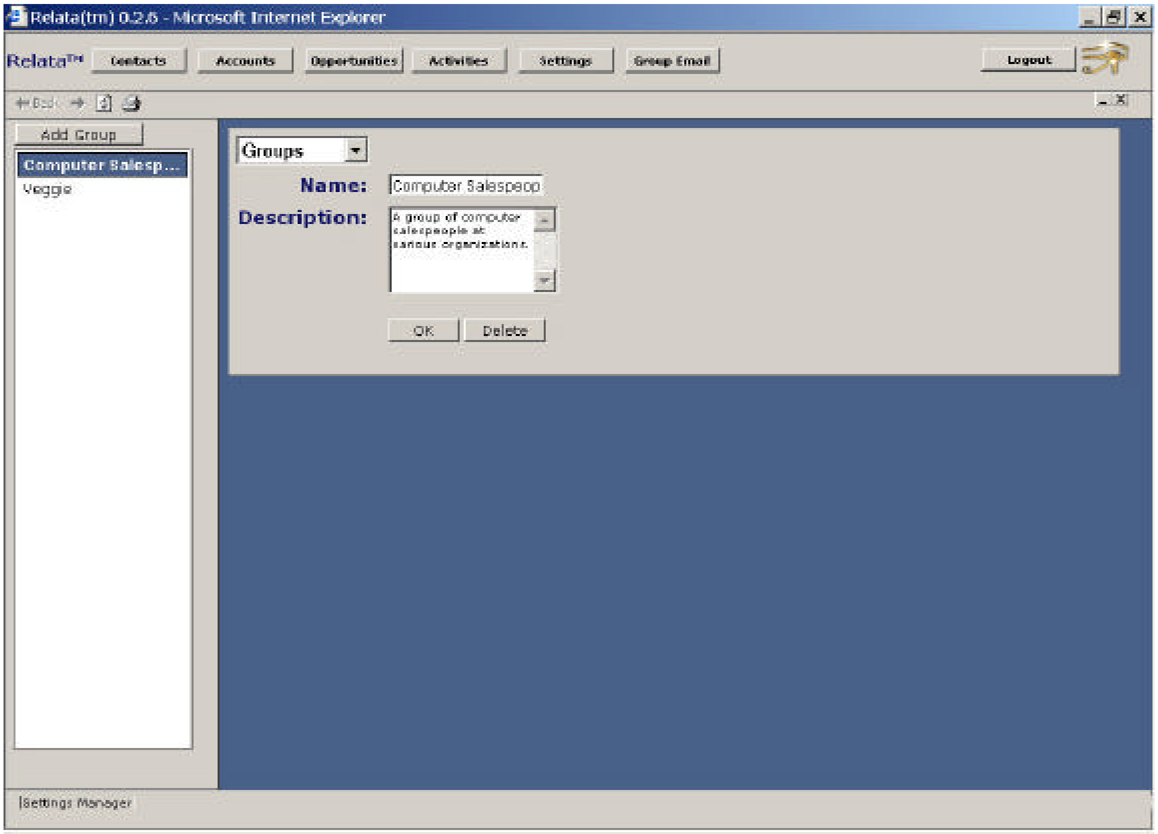
We will look at managing activities in detail in the following sections.

7.1 Adding Groups and Extra Fields

Click on the 'Add Group' button in the left pane to add a new group or extra field name. You will be presented with a page similar to the following once you have done so:

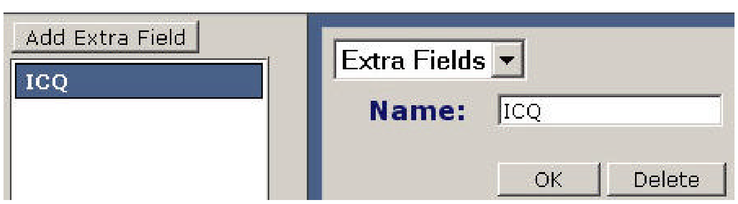


In the above example, a new group called 'Computer Salespeople' is being created. Simply select 'Groups' or 'Extra Fields' to add either a new group or an extra field. Click 'OK' to save the group name and add it to the list of groups in the left pane:



Once the new group has been added to the left pane, the right pane is also updated.

Select 'Extra Fields' from the drop-down menu to view all the extra field names in the left pane or click back on 'Groups' to view the list of group names in the left pane:



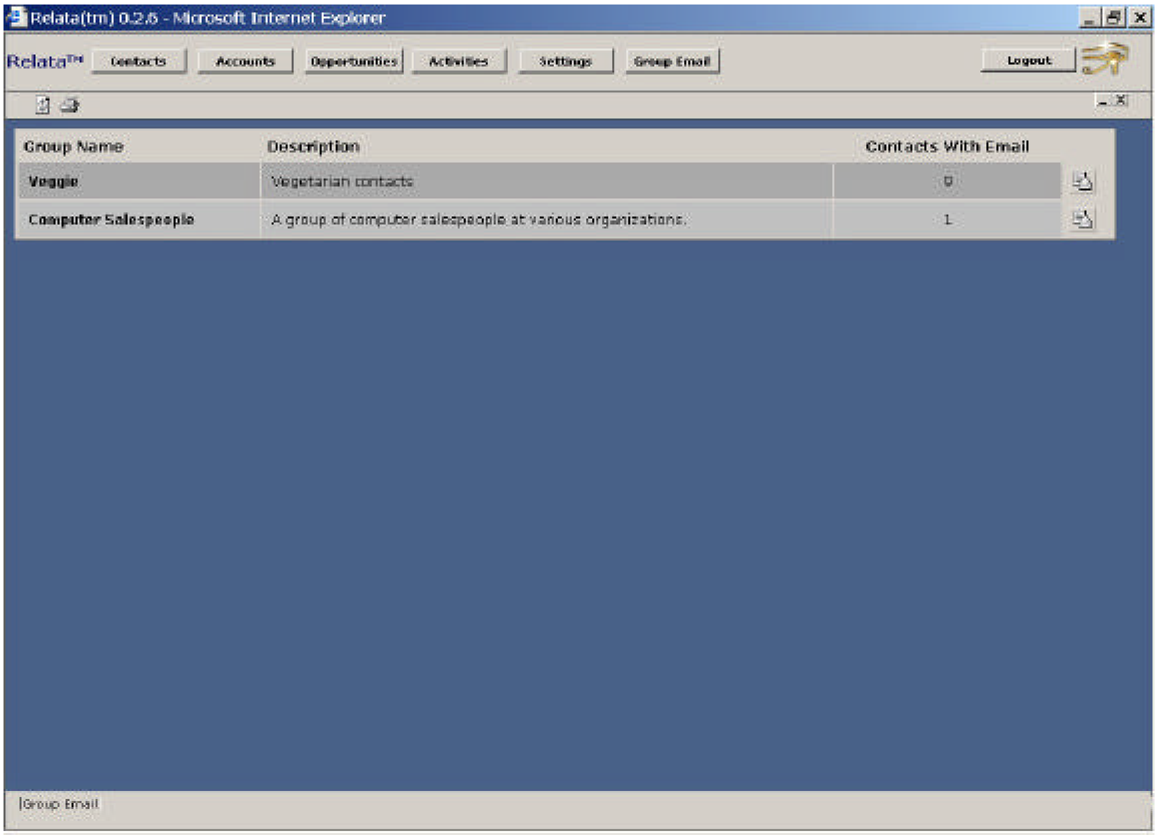
7.2 Deleting Groups and Extra Fields

Select a group or extra field to delete by selecting it in the left pane ('Extra Fields' was selected in the right pane:

In the example above, 'ICQ' has been selected. Click the 'Delete' button to delete the selected extra field.

Chapter 8
Group Email Manager

Upon clicking the ‘Group Email’ button on the Relata menu bar, you will be presented with the group email manager:



The Group Email manager is used to send email to a particular group of contacts. Simply click the email icon at the far right of the group to email the contacts using your email client. The first recipient will be inserted into the to: header and the rest of the recipients will be added to the bcc: header.

GLOSSARY

Term	Definition
AOL	America Online. A national internet service provider who offers their customers a special interface that must be used in order to use their services, including email
CRM	An acronym for Customer Relationship Management
Database	A logical entity that stores vast amounts of data on a physical mechanism such as a hard drive
HotSync	Refers to Palm's technology that allows a Palm to synchronize data with a PC.
ISP	An acronym for Internet Service Provider. Provides Internet service to residents of a municipality, at a fixed or variable monthly cost
Javascript	A web-based scripting language that can be used to interact with HTML components. It does not have all the power of Java, but is designed with a more secure model in mind
MySQL	An open-source relational database management system suitable for small to medium databases. http://www.mysql.com
Open-source	Term used to refer to projects released under the General Public License (GPL) that come with source code. They are freely available and may be modifiable in respect to the terms laid out in the GPL. Typically Linux based projects
Pane	Used to refer to either the left or right window in a split window frame
Palm	A personal digital assistant (PDA)/hand-held portable computing device. http://www.palm.com

PHP	A free scriping web scripting language for Linux and Win32, with a rapidly growing user base. It is scalable and fast.
PostgreSQL	A scalable open-source object-relational database management system that utilizes SQL. http://www.postgresql.org
Sendmail	An open-source mail server that was used when developing Relata. You may download it from http://www.sendmail.org
Server	A logical entity running on a computer that serves or stores data for users
Variable	A logical entity that stores data usually temporarily