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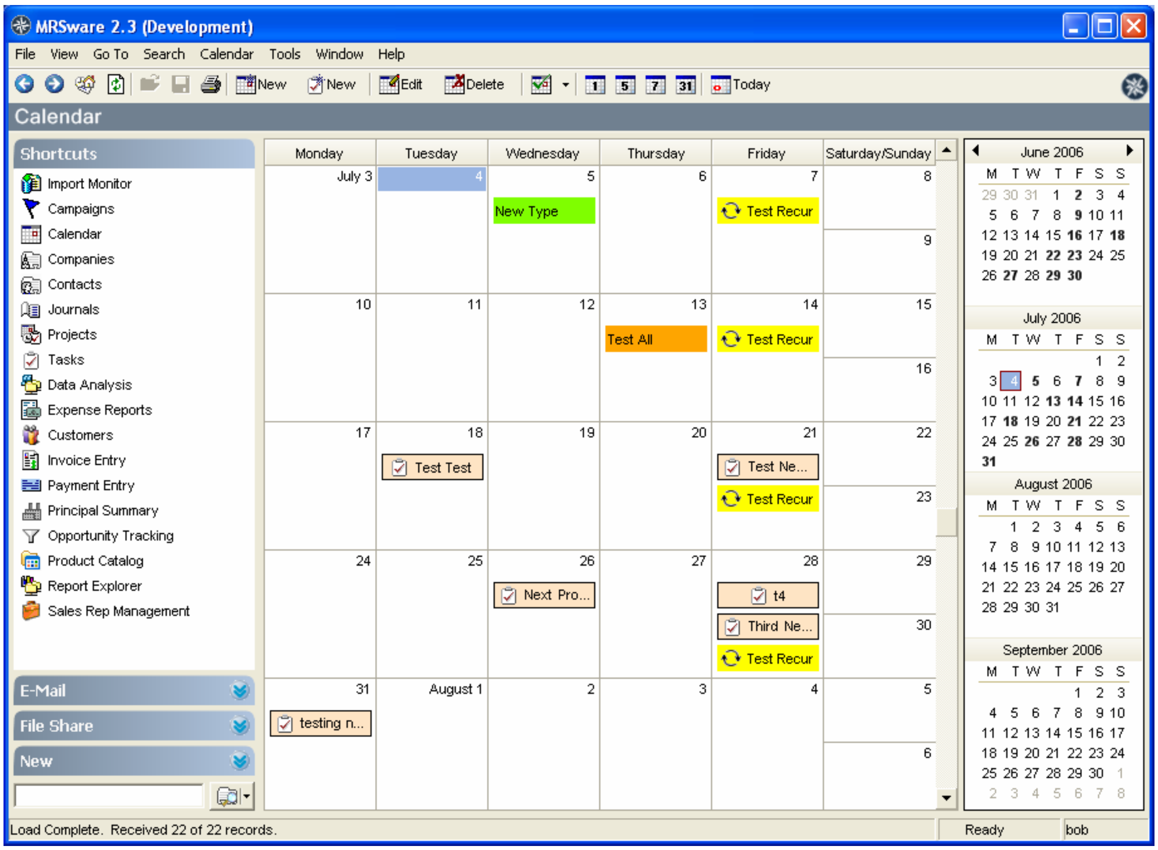
Overview

Contact Relationship Management (CRM) is the center point of the MRSware system. Almost every other module in the system makes use of the contact and company screens. MRSware's CRM increases collaboration through shared appointments, contacts, companies, journals and tasks.

Calendar

The MRSware Calendar is used to schedule and track appointments in the system. You get to the Calendar from *Go to* → *Contact Relationship Management* → *Calendar* or from the *Calendar* option on the Shortcuts bar.



The calendar will show you any appointments that you are an attendee too, any tasks that have due dates and are not complete, and any contacts whose birthdays have been specified in their contact information. Each item is color coded according to its configurable Appointment Label. Double clicking on an appointment or task will open up the Add/Edit screen for that item.

There are four ways to view the calendar:

- Month View will show you 5 weeks at a time.
- Week View will show you 7 days at a time.
- Work Week will show you Monday thru Friday in 30 minute increments.
- Day View will show you a single day in 30 minute increments.

You can change the calendar view from the view menu, or from the 1, 5, 7 and 31 buttons on the calendar toolbar.

The calendar specific menus are explained below:

View Menu

Menu	Description
Show Calendar Bar	Determines if the calendar bar on the right hand side of the screen is displayed for the current view.
Show Attendance Type	This will show the attendees attendance type, required, optional or informational as an icon on the calendar.
Show Attendee Status	This will show the attendees status, invited, accepted, tentative or declined as an icon in the calendar.
Month View	Will show you 5 weeks at a time.
Week View	Will show you 7 days at a time.
Work Week	Will show you Monday thru Friday in 30 minute increments.
Day View	Will show you a single day in 30 minute increments.
Table View	Will take you to a table view of the appointments in the system. This can be useful for exporting calendar information.

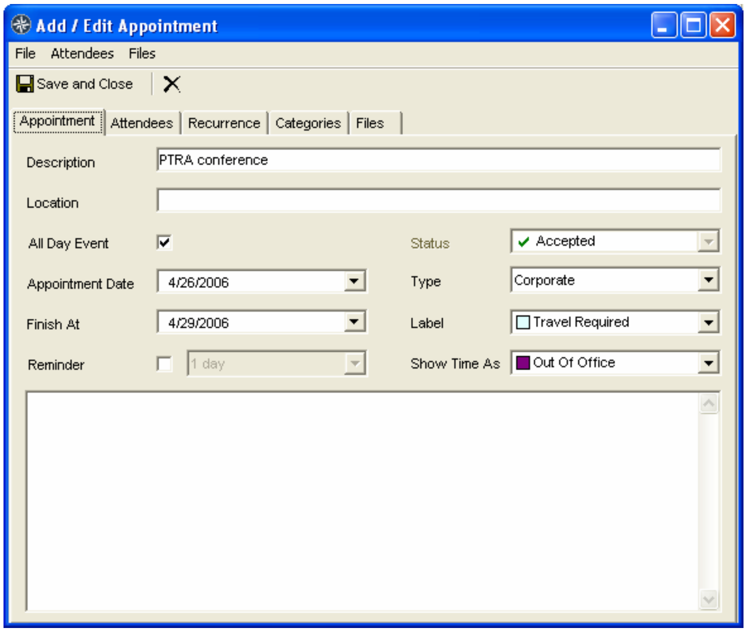
Calendar Menu

Menu	Description
New	Will create a new appointment or task for the selected day.
Edit	Will edit the currently selected appointment or task.
Delete	Will delete the currently selected appointment or task.
Today	Takes you to today's date on the calendar.
Show Appointments	Lets you filter appointments in the calendar by the appointment label.
Show By Attendee	Will break the calendar up by each user in the system, letting you look at different users public and shared appointments.
Show Tasks	Toggles whether or not tasks are shown in the calendar.
Show Birthdays	Toggles whether or not birthdays are shown in the calendar.

Add/Edit Appointment Screen

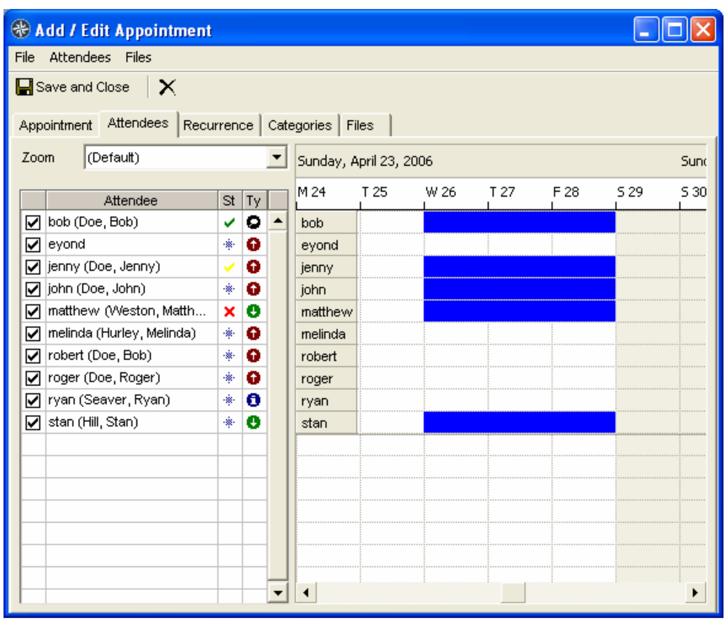
This screen is used to create a new appointment or edit an existing one. It consists of five separate tabs.

Appointment Tab



This tab shows the primary information for the appointment. The Status and Reminder fields are specific to the attendee viewing the appointment. The Status field will be disabled when you are the organizer.

Attendees Tab



This tab shows the users the users in the system and allows you to invite them to the appointment. If you are the meeting organizer, you can assign another attendee as the organizer from this tab. It includes a timeline control to help you determine whether or not the attendee will be available in the time slot you are scheduling.

The first column of the Attendees table shows whether the user is invited to the appointment or not.

The second column is the name of the attendee.

The third column shows the attendees status:

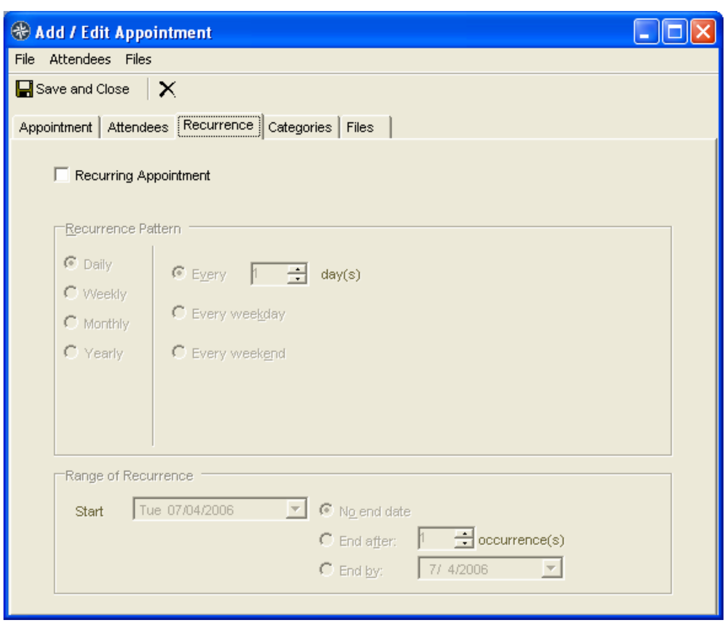
	A blank column indicates no status since the attendee is not invited to the appointment.
	A green checkmark indicates the user has accepted the invitation to the appointment.
	A yellow check mark indicates the user's attendance at this appointment is tentative.
	A red checkmark indicates the user has declined the invitation to the appointment.
	A blue star indicates the user has not yet specified their attendance to the appointment.

The fourth column is the attendee's attendance type:

	Indicates this user is the meeting organizer.
	Indicates the user's attendance is required.
	Indicates the user's attendance is optional.
	Indicates this is an informational appointment for the user. The user is not expected to attend, and does not need to specify an attendee status. The user cannot change any details about the appointment.

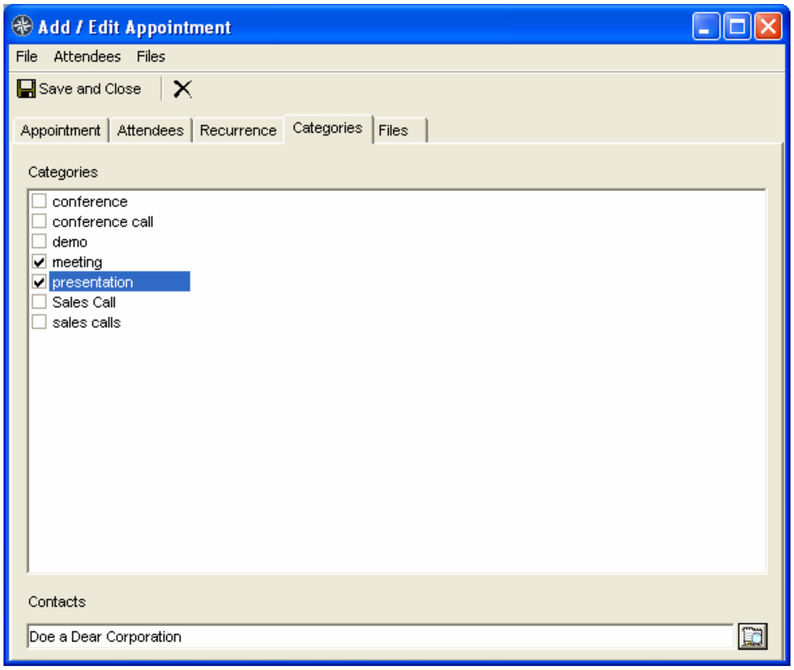
The timeline is color coded based on an appointments Availability field. Blue is busy, Purple is out of office and Yellow is tentative. The current appointment will be displayed with hash marks to help it stand out from the other appointments. The Attendees table supports multi-select operations. Availability is based on both public and private appointments. You can double click on the timeline header to change the start date and time of your appointment.

Recurrence Tab



This tab is used to set up a recurring appointment. When you check that this is a recurring appointment, the recurrence pattern control will become enabled.

Categories Tab



This tab is used to set attributes for the appointment to aid in searches. This is where you can also relate the appointment to other companies and contacts in the system. Relating a company or contact will put the appointment in their activities tab.

Files Tab

Use this tab to relate any documents in file share to this appointment. This can be a useful place for storing the meeting agenda.

Companies and Contacts

Companies and Contacts are the heart of the CRM system. Virtually all information in MRSware gets related back to them. Companies and Contacts are very similar, the first is designed to track contact information for a business or organization, while the second tracks contact information for an individual. They are available from *Go to* → *Contact Relationship Management* → *Companies* and *Go to* → *Contact Relationship Management* → *Contacts* respectively. You can also access them from the *Companies* and *Contacts* options on the Shortcuts bar.

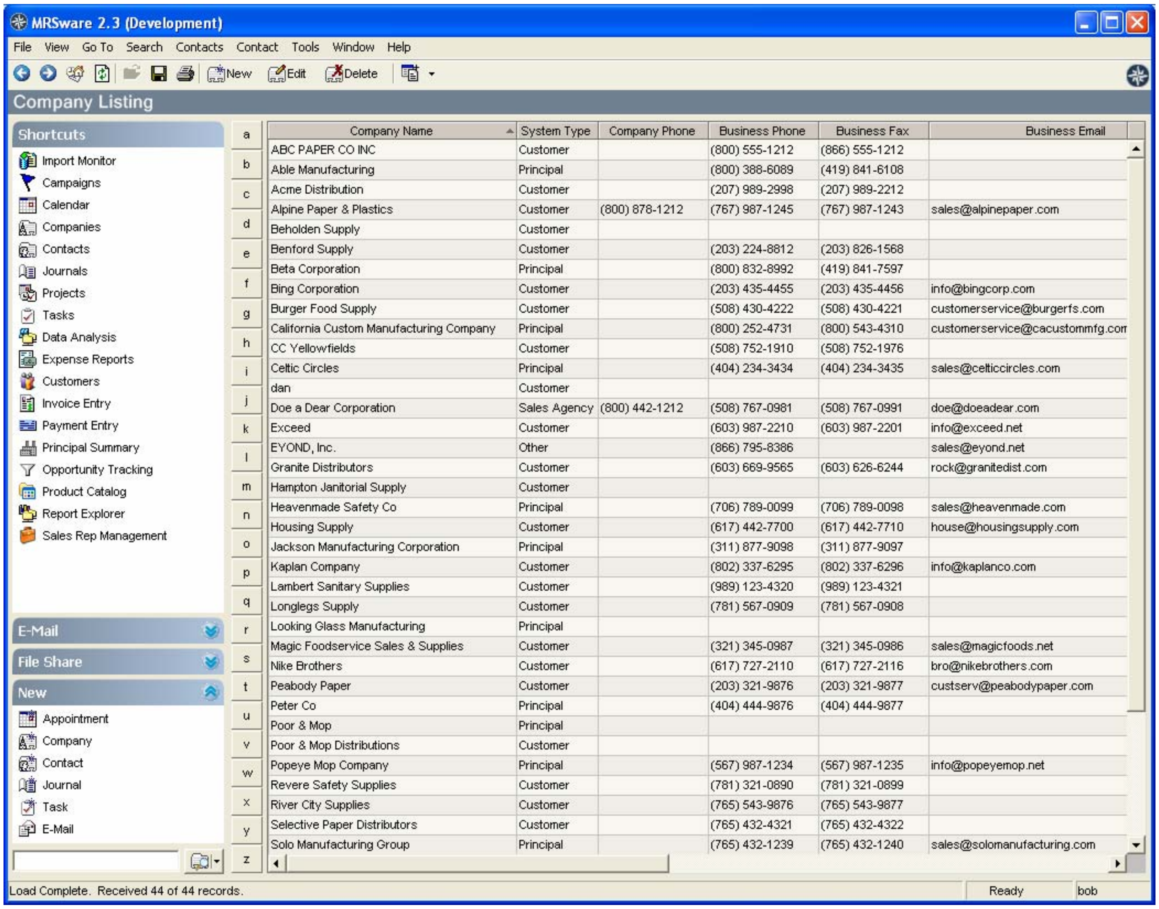


Figure 1 Table View

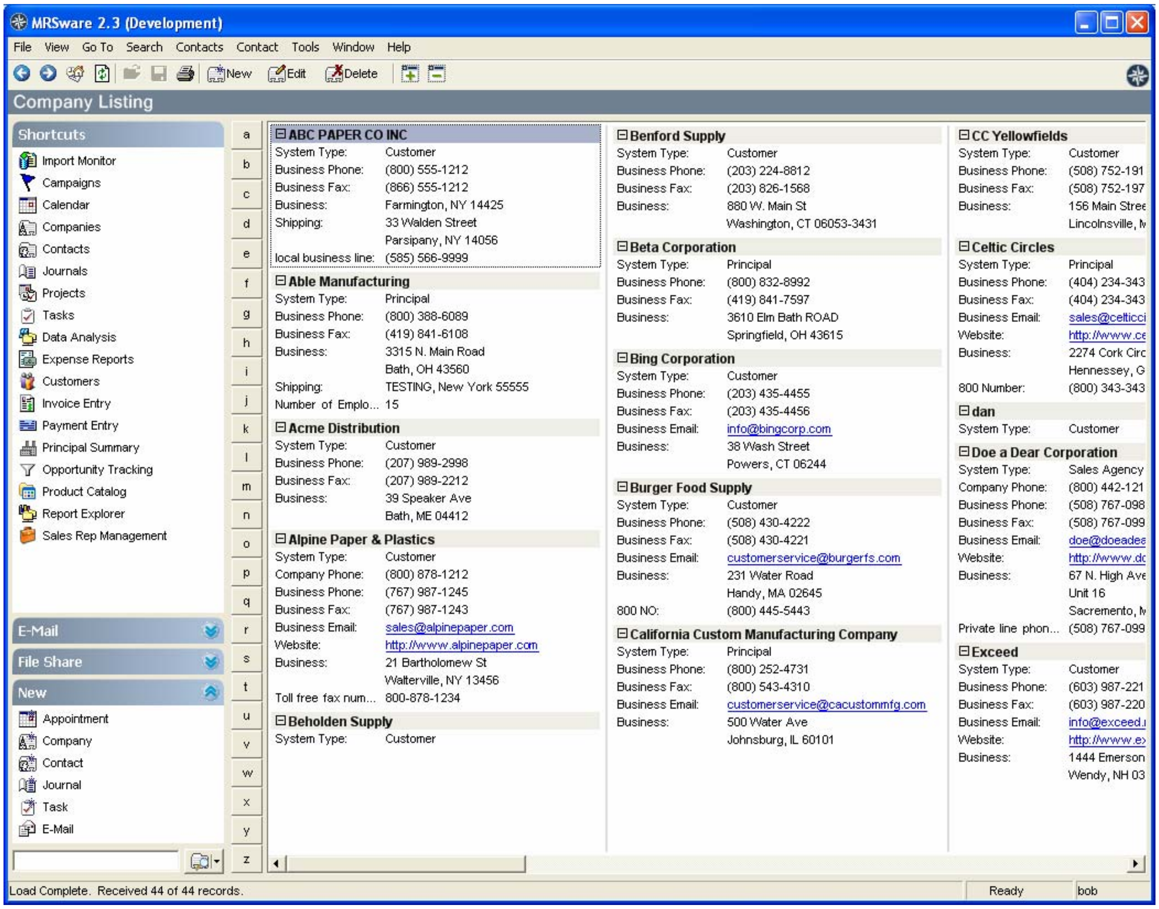


Figure 2 Card View

The Companies and Contacts screens will show you all public contact information, as well as your private contact information.

The contact specific menus are explained below:

View Menu

Menu	Description
Card View	Will change to the card view display of contacts, similar to Outlook. See Figure 2 Card View.
Table View	Will change to the table view display of contacts. See Figure 1 Table View.

Contacts Menu

Menu	Description
Show Hidden	Determines if contacts that have been marked with the Hide setting are shown in the listing.
Mail all contacts in List who have an Email Address	This will create a new mail message with all of the addresses on the BCC line of the email. You will receive a notification for any contacts in the list that did not have an email address.
Run Document Merge	Will be documented in a future release.

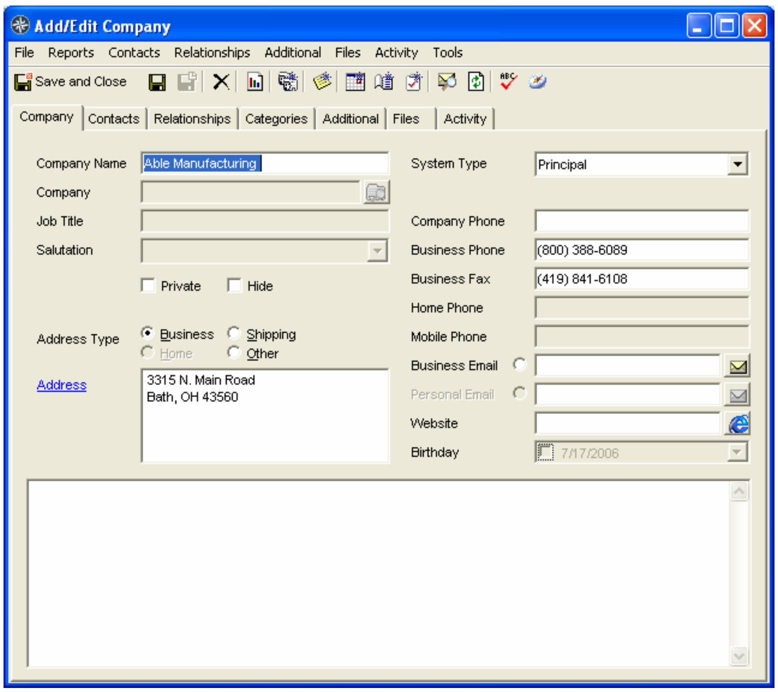
Contact Menu

Menu	Description
New	Will create new contact.
Edit	Will edit the currently selected contact.
Delete	Will delete the currently selected contact.
Bulk	Accesses the bulk update options when more than one contact is selected in the list.

Add/Edit Company and Add/Edit Contact

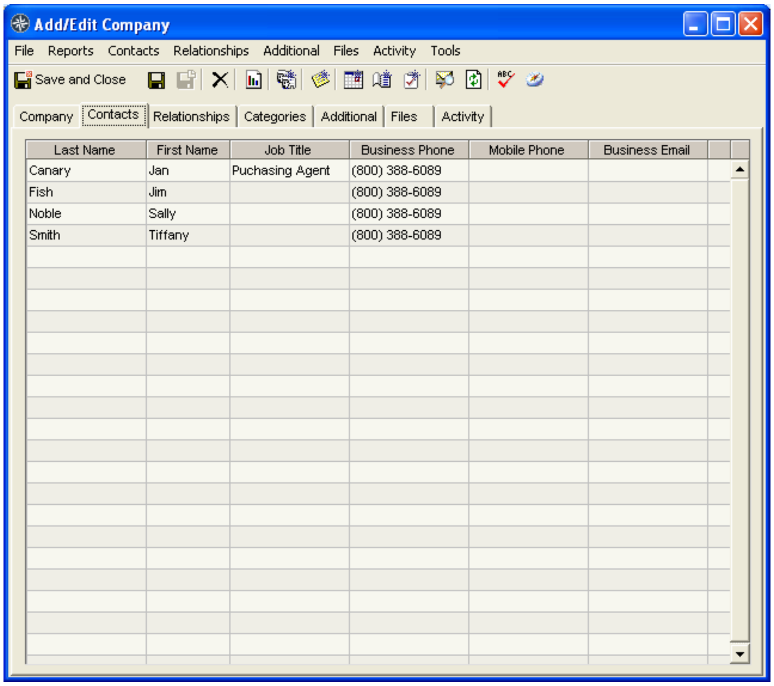
This screen is used to create a new company or contact, as well as to edit an existing one. It consists of up to seven separate tabs.

Company or Contact Tab



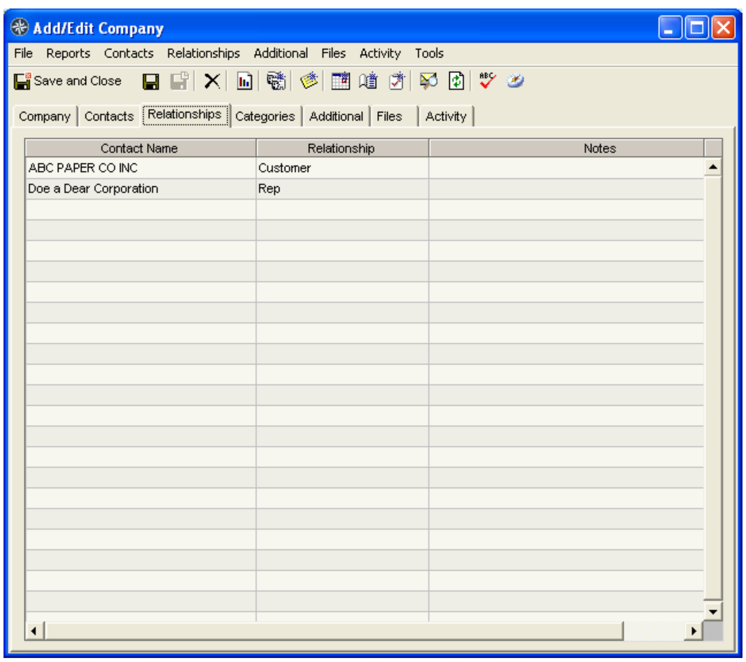
This tab shows the primary contact information for the company or contact. Fields are enabled and disabled based on whether or not you are editing a company or contact.

Contacts Tab



This tab is available only on the Add/Edit Company dialog. It shows some basic contact information for individuals that have been assigned to the company.

Relationships Tab

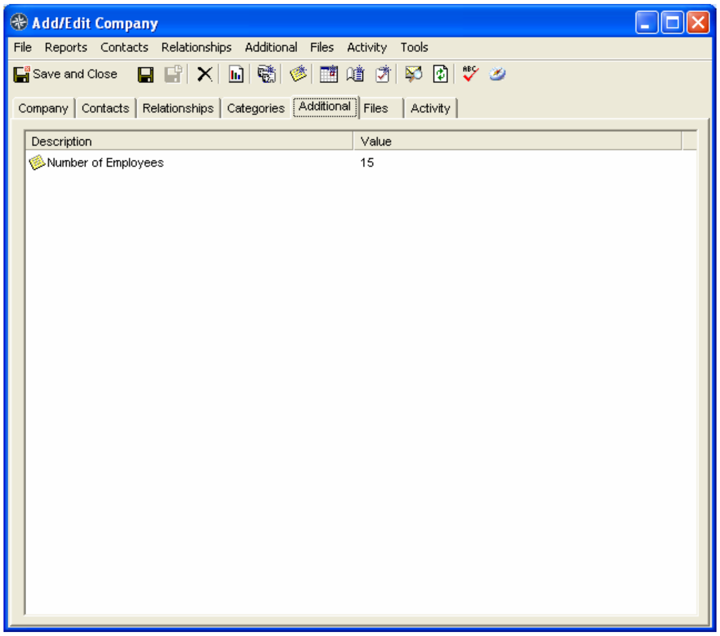


This tab shows other companies that have been related to this company, or other individuals that have been related to this individual.

Categories Tab

This tab is used to set attributes for the company or contact to aid in searches.

Additional Tab

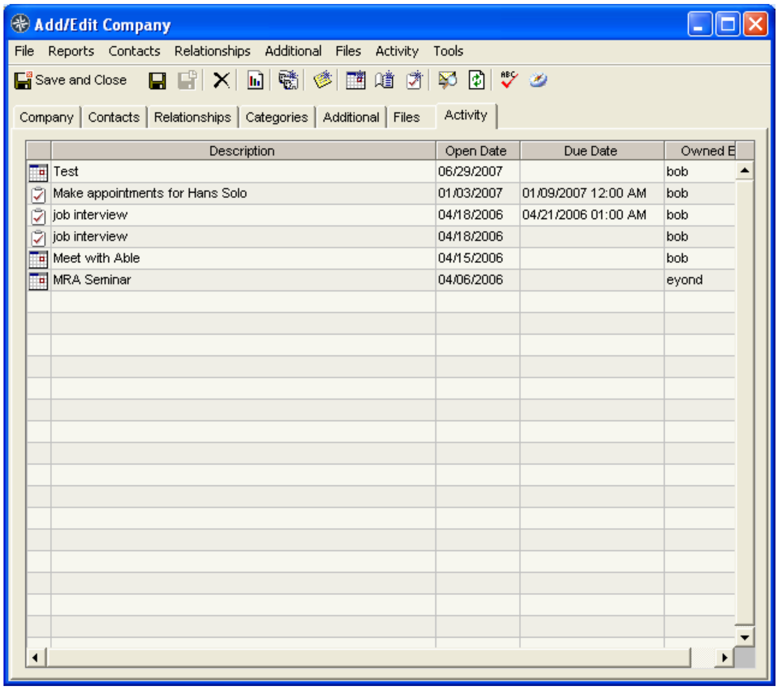


This tab is used to store any additional information about the company or contact. Information can be of the type Email Address, Internet Address, Date/Time or Other. There is an option to show this additional information inline with the card.

Files Tab

Use this tab to relate documents in file share to this company or contact.

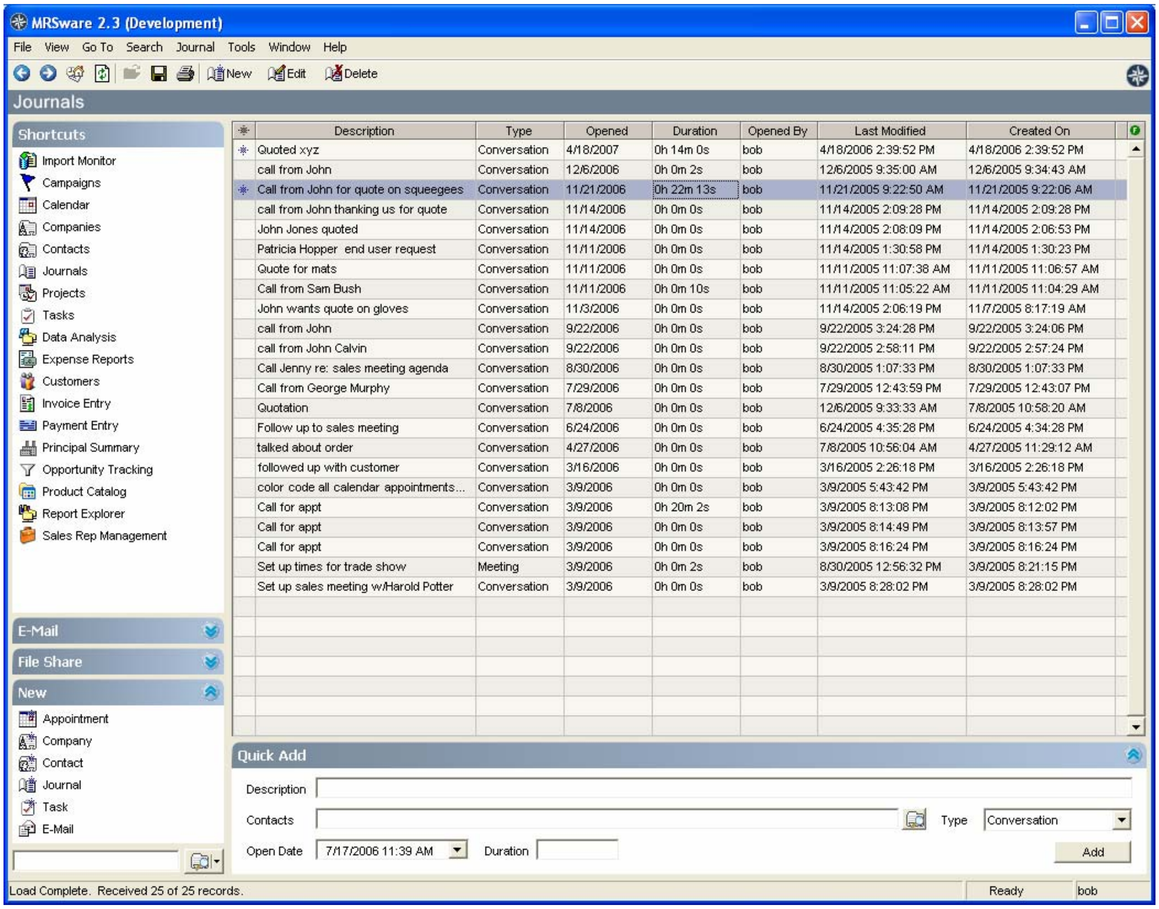
Activity Tab



This tab shows all the touch points made with the company or contact. It shows any Appointments, Tasks or Journals that have been associated with the contact, as well as any other module specific information that can be related. By default, the system shows 90 days of activity. When viewing a company, any activity for the company, as well as activity for contacts of that company, will be displayed.

Journals

Journals are used to help track interactions with a company or contact in the system. You can access Journals from *Go to* → *Contact Relationship Management* → *Journals* or from the *Journals* option on the Shortcuts bar.



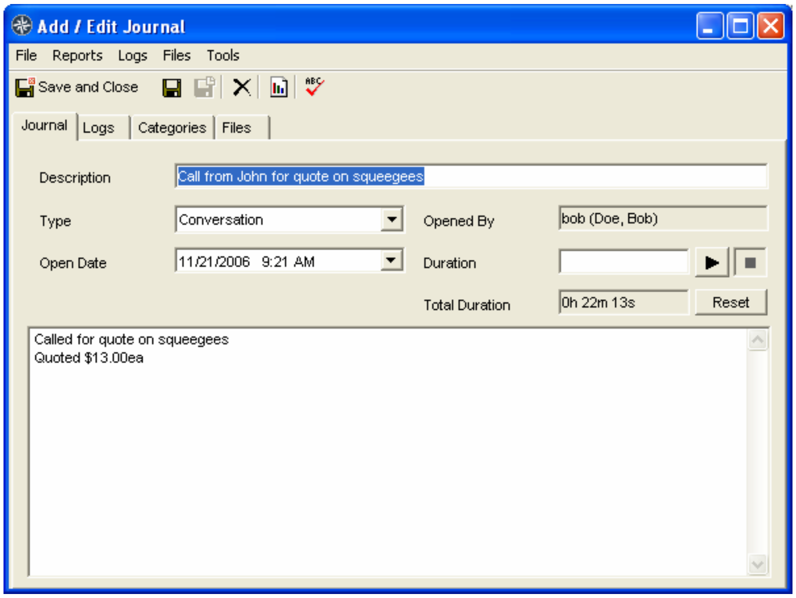
Journals will show you all of the journals you have opened, with the most recent entry at the top of the list. The journal menu is described below:

Menu	Description
New	Will create new journal.
Edit	Will edit the currently selected journal.
Delete	Will delete the currently selected journal.

Add/Edit Journal

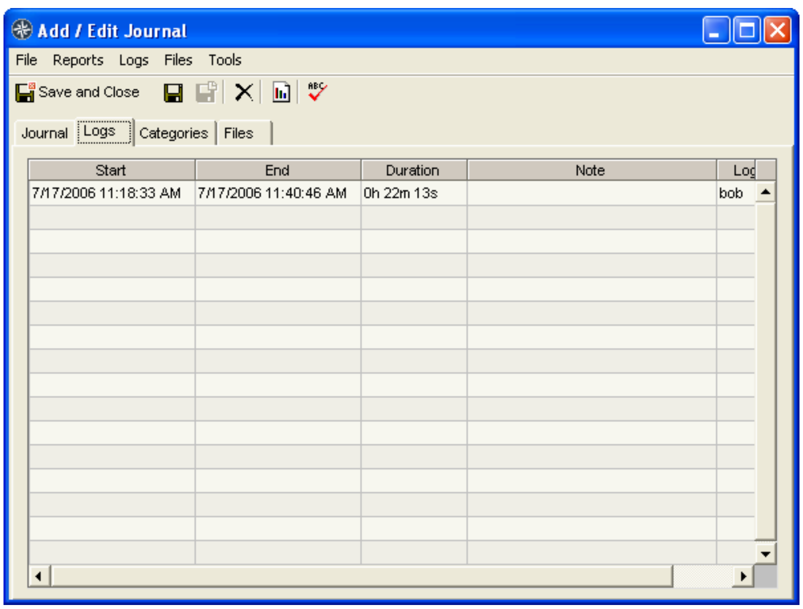
This screen is used to create a new journal or edit an existing one. It consists of four separate tabs.

Journal Tab



This tab shows the primary information for the journal. It includes the timer control for automatically creating log entries.

Logs Tab



This tab shows all timer logs that have been recorded against this journal. You can manually add log records here using options under the *Logs* menu.

Categories Tab

This tab is used to set attributes for the journal to aid in searches. This is where you can also relate the journal to other companies and contacts in the system. Relating a company or contact will put the journal in their activities tab.

Files Tab

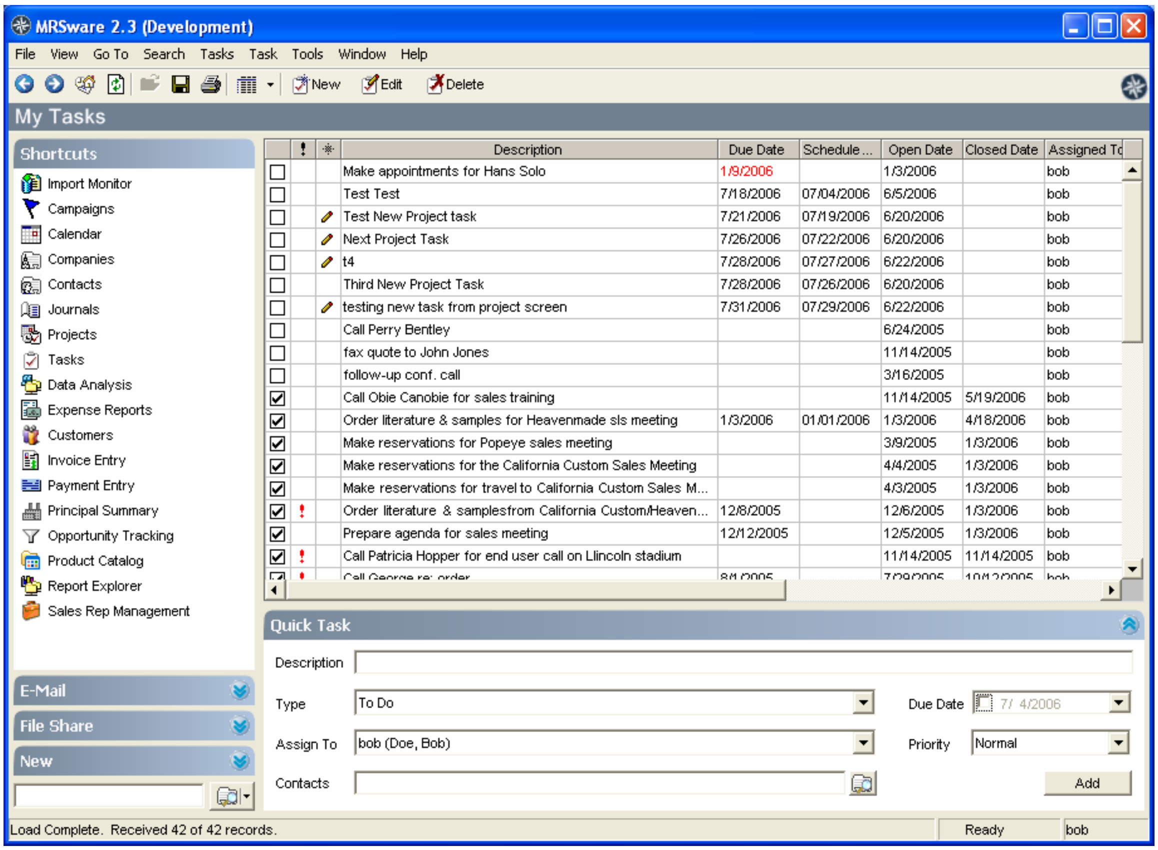
Use this tab to relate any documents in file share to this journal.

Tasks and Projects

Tasks and projects are used to organize and schedule work that needs to be completed.

Tasks

You get to the Tasks from *Go to* → *Contact Relationship Management* → *Tasks* or from the *Tasks* option on the Shortcuts bar.



There are three ways to view tasks:

- My Tasks will show you any tasks that have been assigned to you.
- Tasks' I've Assigned will show you tasks that you have assigned to others.
- All will show you both together.

You can change the task view from the Tasks menu.

The task specific menus are explained below:

Tasks Menu

Menu	Description
Show Completed Tasks	Determines if tasks that have already been completed are shown in the listing.
My Tasks	Will show you any tasks that have been assigned to you.

Tasks' I've Assigned	Will show you tasks that you have assigned to others.
All	Will show you both together.

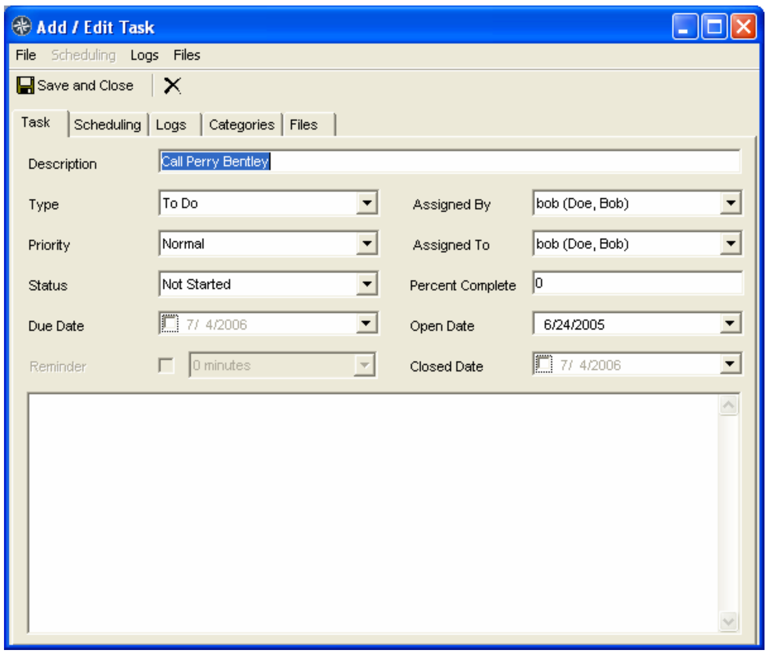
Task Menu

Menu	Description
New	Will create new task.
Edit	Will edit the currently selected task.
Delete	Will delete the currently selected task.

Add/Edit Task Screen

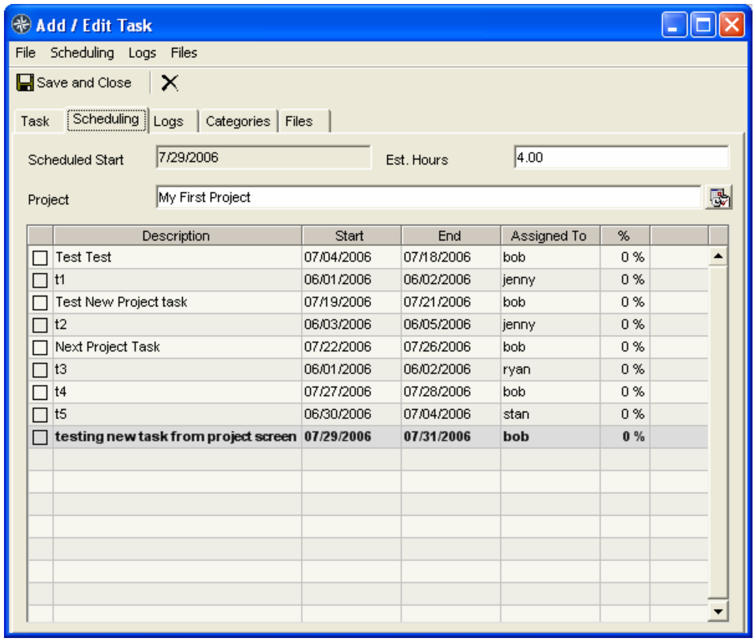
This screen is used to create a new task or edit an existing one. It consists of five separate tabs.

Task Tab



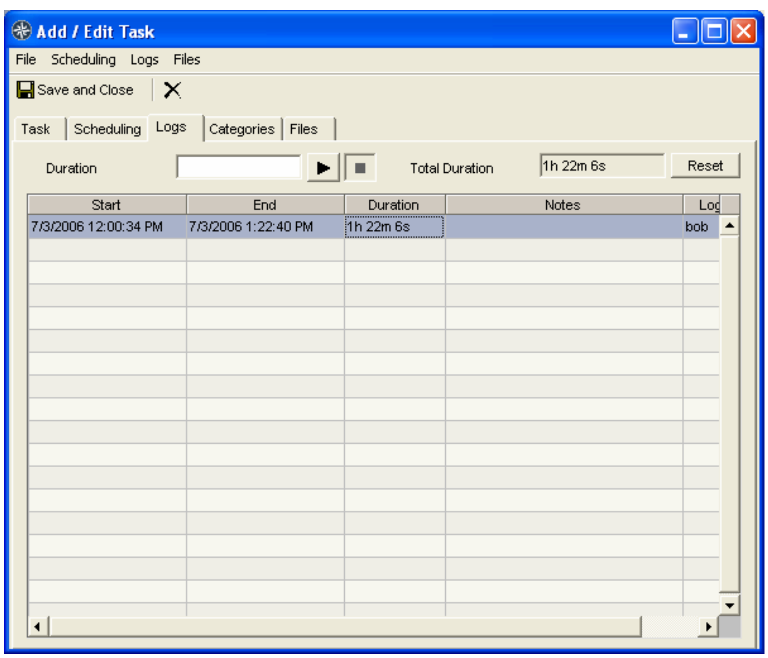
This tab contains the primary information for the task.

Scheduling Tab



This tab is used to specify additional details for scheduling a task. You can specify a date when work on the task should begin, as well as an estimation of how long it will take in work hours, to complete the task. From this tab, you can also associate a task to a project. When a task becomes associated to a project, the project takes over the scheduling details of the task. You will see all of the tasks in the project in the table. It will show the current task you are on, in bold. You can move the task up or down in the order that it should be scheduled.

Logs Tab



This tab can be used to track details of the work performed on a task. It includes the timer control as well as allows you to manually add logs.

Categories Tab

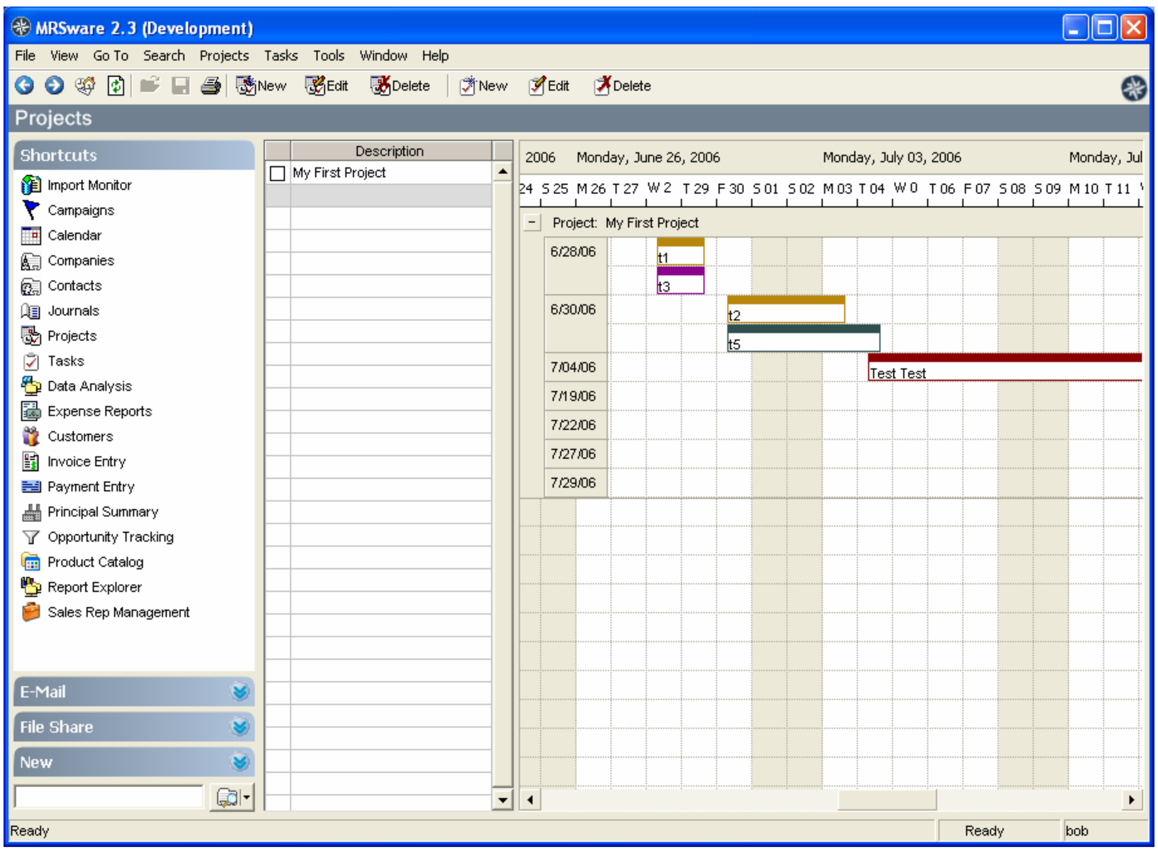
This tab is used to set attributes for the task to aid in searches. This is where you can also relate the task to other companies and contacts in the system. Relating a company or contact will put the task in their activities tab.

Files Tab

Use this tab to relate any documents in file share to this task.

Projects

Projects are a useful way of grouping multiple tasks for multiple users together for scheduling. You get to the Projects from *Go to* → *Contact Relationship Management* → *Projects* or from the *Projects* option on the Shortcuts bar.



Projects gives you a timeline view of the tasks assigned to a project. It is also where you go to manage project information.