

## Why Use a CRM System?

### *DIK (Data Into Knowledge)*

Using a CRM System takes time. So why do it? The answer is in two parts.

Firstly, using a CRM System may not consume extra time. It may even save time.

Most of us want to believe that we can rely on our memory. In reality we accept that we need a “system” (or two) where we record such contact details as

- name
- address
- telephone number
- notes on the last contact
- due date for next contact.

Historically people used hanging folders in filing cabinets, paper diaries and file-o-fax mechanisms to record the details. In this electronic age popular systems that are used include MS Outlook, Spread Sheets, and reminder applications in mobile ‘phones.

All this means that the energy that you use to keep your current systems up to date can be diverted to updating your CRM System.

This may mean that your CRM System consumes no “extra” time and may even take less time because you’ll be storing all of the details in the same place.

Secondly, noting all communications with all of your contacts offers the potential to perform analyses. You can identify the different activities that consume your time and you can answer such questions as the following.

- Is there the possibility to be more effective with some tasks?
- Can you delegate some work?
- Do you spend enough time with “less popular” contacts?

Stage one of this process is to store Data in your CRM database. The subsequent analysis of this Data produces Information that gives you the Knowledge to make decisions with greater confidence. In this way you convert your Data Into Knowledge.

**Getting the Best from TBF CRM 4D**

*Your Data, Structured*

There are three primary types of data in the TBF CRM database. At the top level is the *Place* at which the *Person* is located. For example the *Place* could be the Location where a family of People reside or it could be the Company that employs a number of Staff.

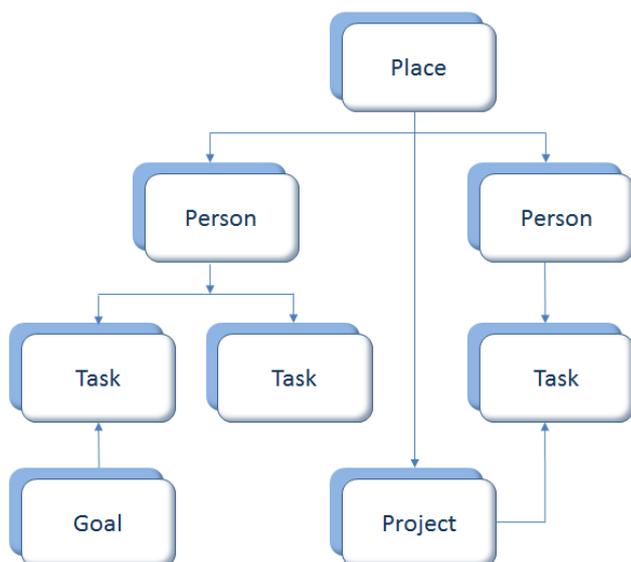
In each case there would be a single *Place* record to which a number of *People* records are linked.

In a similar way each *Person* record in the database is likely to have an increasing number of *Task* records to which it is linked.

In addition, *Projects* can be monitored and these are linked to the *Place* where the project is being run. *Tasks* in the project can be recorded in the database so that they appear in the *To Do List*.

Finally, the system enables you to record *Goals*. These may be personal goals or, for example, Key Performance Indicators for your business. The steps required to achieve each goal can be set as *Tasks* so that they too appear in the *To Do List*.

This structure can be represented pictorial as shown below.



*Planning to Win*

TBF CRM 4D includes a number of options that offer opportunities for clear analysis once a suitable volume of data has been collected.

Each option is contained in a drop-down list. This ensures consistency of use (no spelling errors) and therefore greater accuracy when analyses are being performed.

You can add your own entries to the list for each option.

The options that appear at each level in the data structure are listed below and highlighted in red.

**Task**

- Resource associated with the Task  
Examples embrace a particular Room in a Guest House, a specific Vehicle and a specialist Tool
- Type of Task  
Examples include a Meeting, an Email and a Telephone Call
- Origin of Enquiry  
The source of the marketing collateral.  
Careful use of this drop down list, in conjunction with the content of the Task field, offers powerful analysis of the success of different marketing campaigns.  
Examples include a Mail Shot, a Referral and Twitter

- Project  
The title of the Project to which this Task is linked.

Analysis of this field offers ideas about the work involved in achieving specific milestones in a Project.

- Goal  
The title of the Goal or Objective to which this Task is linked.

By analysing the content of this field in conjunction with other Goal related data, you can assess the effort required to obtain a successful outcome.

**Person**

- Type of Person  
This is distinct from their Job Title or Relationship with other People at the same Place.  
Examples might include Entrepreneur, Decision Influencer or Specialist in a particular field of work.

**Place**

- Type of Place  
Examples could embrace SME's (Small and Medium Sized Enterprises), Start Up and Family Run businesses
- Industry Classification  
Examples here may include Food & Drink, Training and Vehicle Hire
- Sector (of the Market)  
Examples might be Dining, Wedding Photography or Interior Design

In order to ease future analysis the database includes facilities to ensure that these options retain consistent spelling.

**Careful planning for the use of these options will ensure that all the analysis that is performed will use the most accurate data and therefore provide the most meaningful answers to the questions being posed.**

As an illustration, you may wish to determine the companies with the highest number of repeat orders in a county. This means that all the County entries must have the same spelling (to ensure that "Oxon" and "Oxfordshire" do not distort the results). In addition, you would need to register Tasks with a Type highlighting that the appropriate Task was repeat business.

## Time Saving Features

### Things To Do Today

New Tasks are added to the currently selected Person.

The minimum details that are required are the Task description and its Due Date and Time.

Tasks can be recorded historically by entering a prior date and time. Alternatively, time planning is achieved by entering dates in the future.

Note that the system ensures that Tasks cannot be scheduled to run together. “Colliding” Tasks are scheduled in five minute intervals.

TBF CRM 4D maintains a list of incomplete Tasks. These can be viewed by selecting the 'To Do List' tab.

This list of Tasks is displayed in order. The top level sort order is Priority, then comes the Date on which the Task was scheduled and finally the scheduled Time.

Full details of the Tasks in the To Do List can be viewed by double-clicking in the row that contains the Task's summary data.

Tasks are completed by updating the “Done” entry for the Task.

To complete a Task proceed as follows.

1. Click Edit to enter update mode
2. Double-click the “Done” date to replace the base date (0100/01/01) with the current time and date.
3. Click Save to write the changed details to the database.

Note that if the “Done” date does not contain the base date, the system will replace the existing date with the “Done” date. This is a quick way of changing a Task back to incomplete.

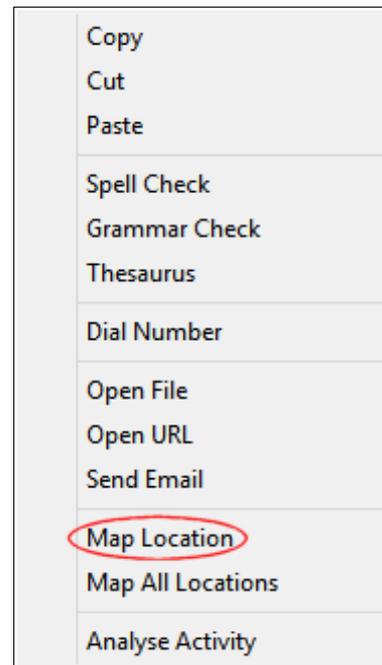
The Preview button transfers the current To Do List to Microsoft Word where the Tasks are shown against the time of day at which they are scheduled.

Use the Help button to reveal the use of the other features on the To Do List form.

### See the Location

In the Places tab double-click the Post Code (or Zip Code) field and the system will open Google Maps showing the location of the Post Code.

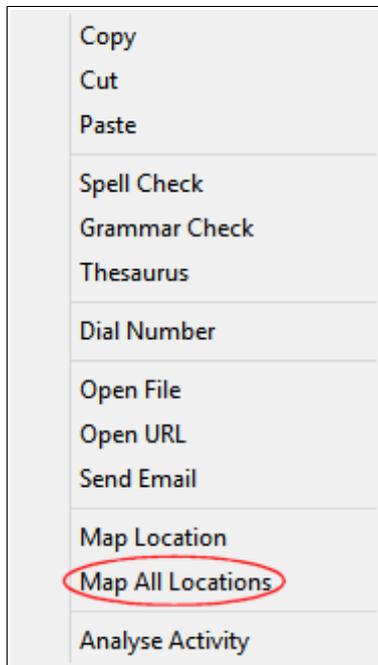
This can be achieved in any other field by highlighting the Post Code and then using the right-click on your mouse to reveal the following popup menu.



Select the “Map Location” entry to start Google Maps.

### *Map a Number of Locations*

Use the Search facilities to select the Places that you wish to be mapped. Use the mouse right-click to reveal the popup menu and select Map All Locations



The system exports details of the selected Places and displays them using your Spreadsheet program. Edit these details and save the changes.

The longitude and latitude of Places are stored in the database to facilitate rapid mapping. See the notes below for advice on correcting erroneous values.

If a Place does not have its longitude and latitude stored in the database, TBF CRM 4D uses web services to plot where each Place should be mapped. The system uses three web services – Nominatim, GISgraphy and Google – in the order indicated.

Nominatim is a no charge option, has no usage limits but has only limited accuracy.

GISgraphy is a no charge option, has a high usage limit and has medium accuracy.

Google provides the most accurate mapping but has a low usage limit unless fees are paid.

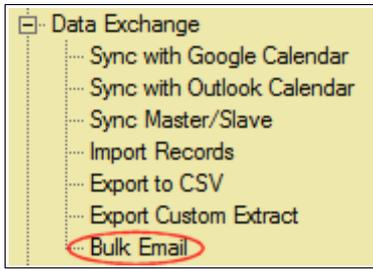
Using the above cascade strategy it is possible that a few Places will be incorrectly mapped.

To correct the mapping for a specific Place proceed as follows.

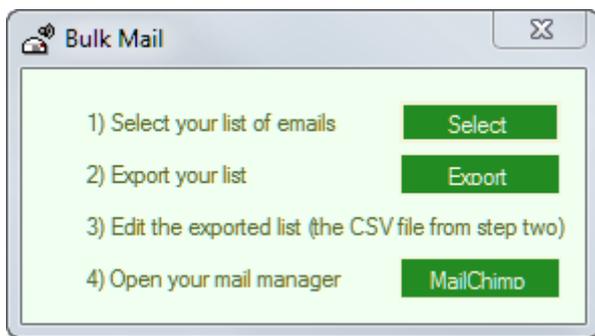
1. Use the Search facilities to find the Place.
2. Edit and Save the Place details. This ensures that the GeoCode entry for the Place is cleared. Note that it is not necessary to change any details of the Place, it is only required to click on the Save button.
3. Double-click in the Post Code field to map the Place. This process uses the Google mapping service (for accuracy) and saves the longitude and latitude in the database.
4. Rerun the Map All Locations process.

*Send Bulk Emails*

The Bulk Email facility is available in the side bar under “Data Exchange”



Clicking this option reveals a form that guides you through the process of sending a Bulk Mail.



Step one requires you to click “Select” to use the search facilities to identify the people who you wish to receive your email.

You then go to step two and click “Export” to create a CSV file that includes the emails of those people.

In step three you use your preferred spreadsheet program to perform a final edit of your list before moving to step four.

If you click “MailChimp” at step four the program opens this popular Bulk Mail service. Alternatively you can use your preferred Bulk Mail utility.

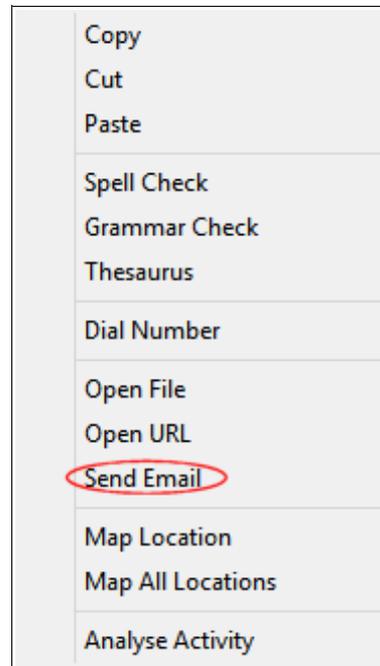
Note that you can edit the exported CSV file and add Task details that define the fact that an email was sent. You can then “Import” these Task details to create follow-up alarms in your database.

*Remember to disable the “Evening Times” option before performing this import, otherwise you may have alarms scheduled through the evening.*

*Send an Email*

In the People tab double-click in the email field to open your preferred email program.

If an email is included in another field, highlight the email and then right-click on your mouse to reveal the following popup menu.

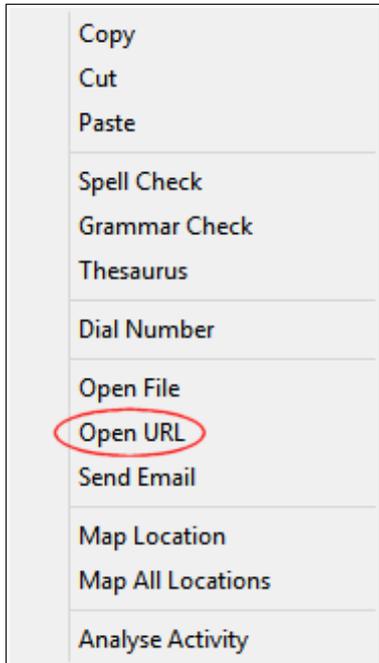


Select the “Send Email” entry to open your email program.

*View the Web Site*

In the Places tab double-click in the Web Site field to open your preferred web browser and show the selected web site.

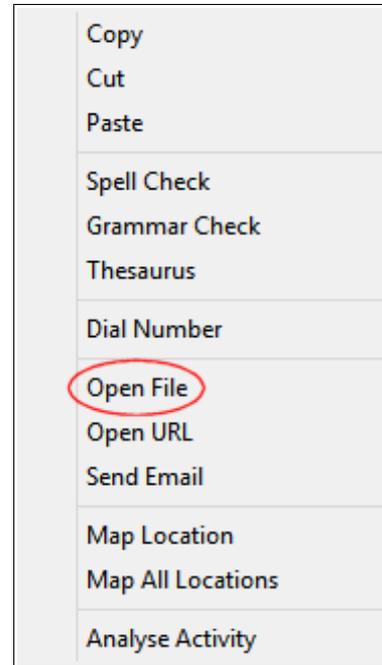
If a URL is included in another field, highlight the URL and then right-click on your mouse to reveal the following popup menu.



Select the “Open URL” entry to display the web site in your preferred web browser.

*Open a File*

In the Tasks tab drag with the mouse in the Path to File field to highlight the path to the required file. Then right-click in the Path to File field to reveal the following popup menu.



Click the “Open File” entry to open the selected file using its default application.

## Dial a Number

This facility requires a modem to be included in the computer.

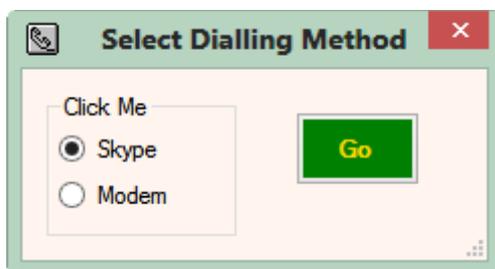
Double-click in any telephone number to trigger the operating system's built-in dialling mechanism.

If a telephone number exists in another field highlight the telephone number and right-click with your mouse to open the following popup menu.



Click the “Dial Number” entry to start the operating system's dialling mechanism.

The first time you use this option you will be invited to select dialling via a Modem or dialling via Skype.



You can revise this selection by using the option *Reset Dialling Method* in the side bar.

NB: If you do not select Modem, you may need to open Skype in order to “allow access” to TBF CRM 4D.exe

## Dial via Skype – Save Money Too

This option requires that you have a Skype Account.

As with telephone number dialling, double-click on the Skype Name to trigger Skype.

NB: You may need to open Skype in order to “allow access” to TBF CRM 4D.exe

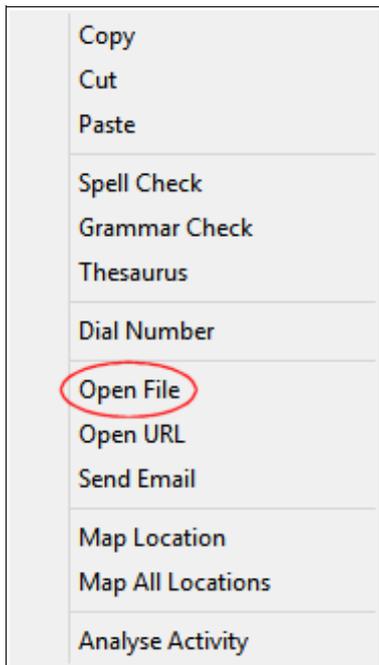
*View, or Store, the Link to a File*

In the Tasks tab, if the field is empty, double-click in the field “Path to File”. The program will reveal a File Open dialog box to enable you to select the file that you wish to link to the task.

*To add an extra file link, click on the Edit Button to enter edit mode. Then use the Shift Key when you double-click in the field. The additional file path is added at the end of the list, separated by a blank line.*

If the field is not empty the program assumes that the field content is the path to a single file and will open the appropriate application that displays the contents of that linked file.

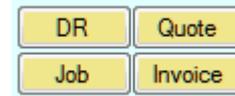
To View the content of a file when more than one file path is present, with the mouse in the “Path to File” field drag the mouse to highlight the path to the required file. Then right-click in the “Path to File” field to reveal the following popup menu.



*Click the “Open File” entry to open the selected file using its default application.*

*Quick Link to Discussion Report etc.*

In the Tasks tab click on one of the following buttons to pass data to Microsoft Word.



The “DR” button opens a Discussion Report that enables you to record the full details of a meeting or other communication. Note that this option will also transfer details from the currently selected Project in the Projects tab.

The “Quote” button transfers the selected Name and Address to the Microsoft Windows template called “Std Quotation.Dot”. You can edit this template to suit your own requirements.

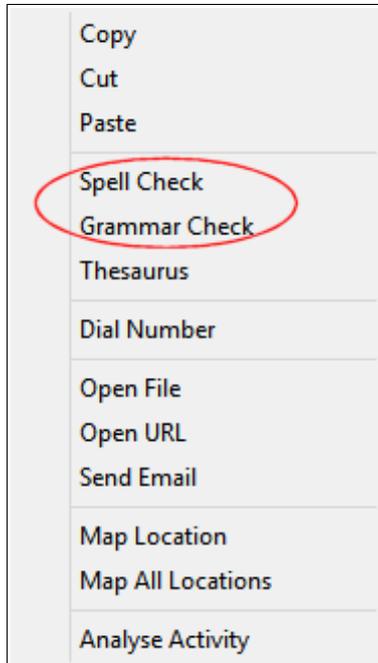
The “Job” button transfers the selected Name and Address to the Microsoft Windows template called “Std Job Sheet.Dot”. You can edit this template to suite your own requirements.

The “Invoice” button transfers the selected Name and Address to the Microsoft Windows template called “Std Invoice.Dot”. You can edit this template to suite your own requirements.

*For each of these buttons the program will ask if a follow-up task should be created N days in the future. A value of 0 days will prevent a follow-up task being created.*

## Validate Text Entries

With the cursor located in a Text Field click on the *Edit* button to enable data changes. Then use the Right-Click of your mouse to reveal the pop-up menu.



Select either *Spell Check* or *Grammar Check* to validate the contents of the selected field.

**Getting Started**

The chances are that if you've got this far you have already installed TBF CRM 4D – and may already be using it.

However, if you wish to start again or if you would like to tell a friend here's how to get started with the latest version.

Use your web browser to download the file at [www.TBF.co.uk/Download/TBFCRM4D.exe](http://www.TBF.co.uk/Download/TBFCRM4D.exe)

Select either RUN or SAVE the file on your computer.

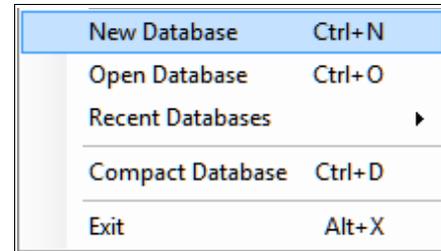
Double-click the downloaded file to run the Install Suite.

Follow the on-screen instructions. If this is a first install you may have to install some additional Microsoft routines. In this case use Microsoft Update to ensure that the additional routines have all the latest updates applied.

After the Install Suite has run you are ready to start the program.

*Creating Your Database*

The first time you run TBF CRM 4D you will be asked to create your own database. Thereafter, you can create a new database by selecting the following option from the File menu.



When you select *New Database* the application checks the current database to ascertain if it is a SQL Azure database. If it is, you will be directed to create a new local database. See point two below.

1. If the current database is not a SQL Azure database you will be asked if you wish to use a SQL Azure database.

If you elect to use SQL Azure the application determines if it already has the parameters to open your SQL Azure database. If not you will be asked to supply the *Server*, *Database Name*, *User ID* and *Password*.

2. If a SQL Azure database is not to be used the application copies a basic database to the selected location on your computer and gives the copied database the name that you choose.

If you have created more than one database you can switch between them using the *Open Database* option in the menu shown above.

**Please contact TBF (SQLAzure@TBF.co.uk) if you would like us to transfer your local TBF CRM database to SQL Azure.**

Using TBF CRM 4D

Adding New Details

To add a new record to your database select the appropriate level (Place, Person or Task) by clicking on the appropriate tab and then click the New button.



The program will enable data entry in all of the fields and reveal the Save and Cancel buttons.



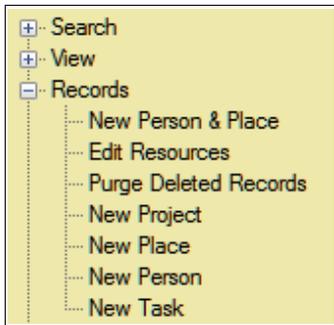
To store the newly entered details in the database click Save. Click Cancel if you decide not to update the database.

Once you have at least one record at the appropriate level the program will offer an Edit option as well as the New option.



When you click on the Edit button the program will allow you to change the details in the currently selected record.

Data can also be added to the database using the Records option in the side-bar.



The New Task, New Person, New Place and New Project options are the same as clicking the New button in the appropriate tab.

If you select the New Person & Place option the following form will be displayed.

This form enables you to enter summary details for a new Person and Place at the same time.

The Records entry in the side-bar also provides an option to Edit Resources. Selecting this option reveals the following form.

Title	Description	Type	Status	Status Desc	Notes	Updated	UpdatedBy
Birthday		Reminder				09 May 2011 10:12	RSB
Car Service	To be completed	Reminder				10 Oct 2011 09:30	Roger Beaumont
Diary		Reminder				12 Mar 2012 16:18	RSB
eMail	Sent or Received	Reminder				21 Jun 2012 17:30	RSB
F1 Grand Prix	Race Day - Prec	Reminder				29 May 2011 08:44	RSB
Meeting	Non-specific. Ma	Reminder				06 Jun 2011 08:10	RSB
OOO	Oxford Oesophag	Reminder				15 May 2011 16:11	Dodge
Rotary						10 Feb 2012 07:04	RSB
Table 01	Covers 2	Restaurant			Near minor	25 Apr 2011 00:00	RSB
Table 02	Covers 2	Restaurant				25 Apr 2011 00:00	RSB

You can use this option to add New Resources or to Edit an existing Resource.

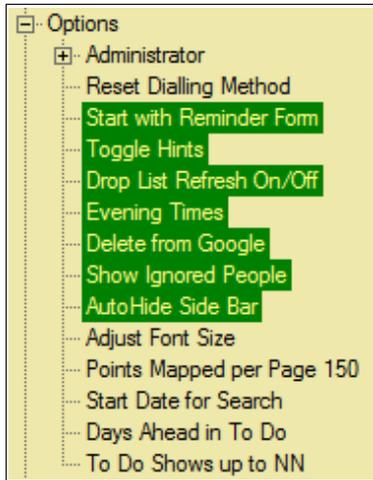
Note 1

It is not essential to use Resources in your database. When Resources are linked to appropriate Tasks you can perform subsequent analyses to identify which Resources are used most, for what and by whom. This can help with the future scheduling of Tasks.

## Note 2

After Adding or Editing records the program refreshes the “spreadsheet” style of viewing data. This can take a few seconds if there are a lot of records in the database.

Hint: Click on the *Drop List Refresh On/Off* option



to get the program to reveal counts of the records in your database.

## Deleting Records

Removing records from the database is a two stage process.

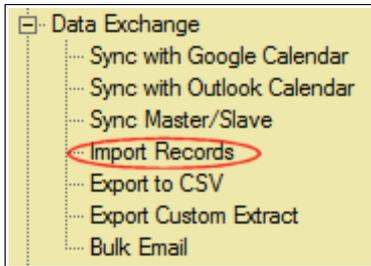
In Step 1 you edit the appropriate record and set its Status to D (Deleted). This means that the record will be excluded from Searches and will not be Exported. However, the record remains in the database and so can be undeleted at a later date.

To physically remove the record from the database use the Purge Deleted Records option in the side-bar.

*Warning: Purging records from the database cannot be undone.*

## Importing Data from Excel

The Data Import utility is loaded when you select the Import Records option in the side-bar.



To prevent data corruption the utility closes the main program before it starts.

You can import records from a Comma Separated Values (.CSV) file or from a Microsoft Excel workbook. Use the File | Open menu option to select your input file.

When the utility starts you are invited to match the column headings in your input file with the column names that the utility uses internally.

After matching the column names the utility's Data menu is enabled.

To import data select Place, Person or Task from the Data menu.

*Note that Tasks cannot be imported unless a linked Person record already exists in the database. In addition, People details cannot be imported unless a linked Place record already exists.*

The selected details are read by the utility and displayed in a spreadsheet format. You can edit the details at this stage.

To import the data, click on the Import button.

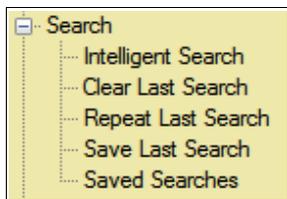
### Finding Existing Data

#### Intelligent Search

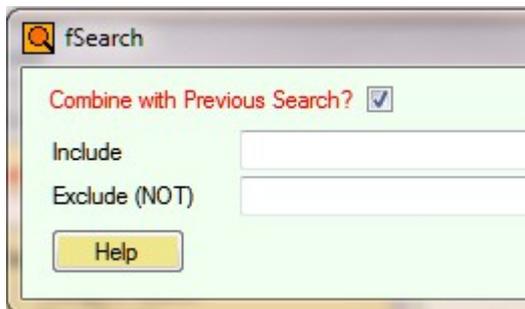
The Intelligent Search is one of the most powerful features of TBF CRM 4D.

It searches across all four record types (Projects, Places, People and Tasks); automatically recognises text, numbers and dates; combines successive searches to reduce the number of 'found' records; and supports OR and NOT relationships as well as combining search arguments with the AND clause.

To start searching the database, click on (Intelligent) Search in the side-bar.



A dialog box is revealed into which you type your search criteria.



The **Combine with Previous Search?** Item is only selected if this is not the first search.

Use the Help button to see which fields are included in the search operation and to read all of the Intelligent Search options that are available.

#### Combining Search Types

In addition to the Intelligent Search TBF CRM 4D also allows you to search on a specific field (see *Limit the Search to a Specific Field* later in this chapter).

Successive searches are combined automatically with the "next" search. However, specific field searches are only combined using a logical AND clause.

## *Repeat a Previous Search*

Use this option to reveal a form that displays the search arguments that have been used previously during this session.



Select a search argument from the list and click *Search*. If your required search is not in the list click *Cancel* to perform an *Intelligent Search*.

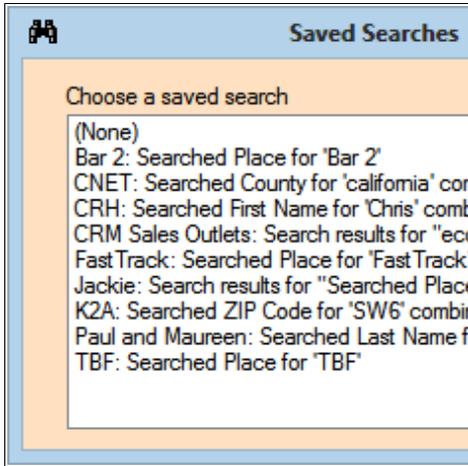
## *Clear Search*

This option can be used to quickly clear all Search History and to reveal all the records in the database.

Both the Intelligent Search History and the Specific Field Search History are cleared with this option.

## Saved Searches

Selecting the Saved Search option reveals a form that displays a list of saved search arguments.



Click on an entry in the list to repeat that search.

If you select “(None)” the form is closed without repeating any of the previous searches.

The saved searches are stored in the same directory as the database. This means that you can hold different databases in their own directory and so maintain a history of searches that is unique to the database.

## Save Last Search

Use this option to store the search criteria that you used to produce your current list of “hits”.

*Limit the Search to a Specific Field*

There may be occasions when the Intelligent Search is too generalised. For example if you search for “London” you may not wish to see records where the Place is in London Road, nor where a Person at a Place is called Jack London.

In this case you require a search that is limited to the “Town” field in the Place record.

To achieve this, place the cursor in the field that you wish to use.



The name of the field will be displayed at the top of the side-bar as illustrated above.

Type your search argument into the field below the prompt and press the Enter key.

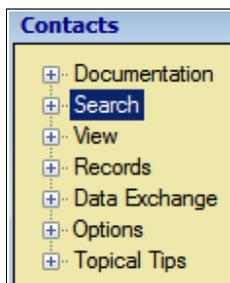
There are two special search arguments that you can use.

- “Is Null” will retrieve a list of records where the chosen field is empty.
- “Is Not Null” will retrieve a list of records where the chosen field contains a value.

These special search arguments can be useful when you wish to be able to count records. For example if you use the “Is Not Null” option in the person's email field you can then export the resultant “hits”, edit the exported CSV file, and use the edited list of emails for a bulk mail exercise.

*Note*

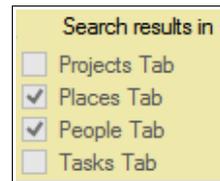
*Not all fields can be used for a specific search. If you choose one of these fields, the prompt is not shown in the side-bar.*



*Highlighting Hits*

Following a search the program highlights the fields that contain the search argument. This means that as you scroll through the list of records that contain the searched argument, the actual field that has been highlighted may not be in the currently selected tab.

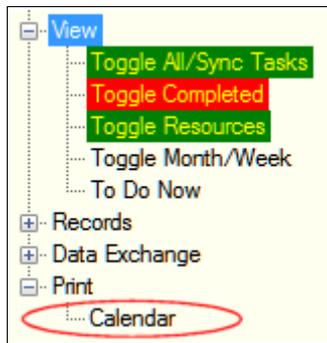
For this reason the program includes a visual prompt at the bottom of the side-bar.



This prompt identifies the tab, or tabs, that contain at least one field that has been highlighted because it contains either the search argument or part of it.

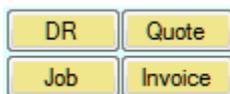
### Integration with Microsoft Office

#### The Calendar Print option



transfers a list of Tasks to Microsoft Word on a month by month basis. The Tasks are colour coded when they are displayed. The coding indicates whether the Task is complete, synchronised, or just a normal scheduled task.

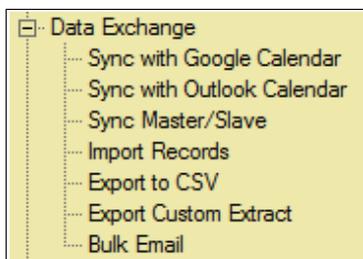
TBF CRM 4D links to Microsoft Office in more than one area.



The above options, available with the Task tab, pass appropriate details to one of four templates in Microsoft Word. The section titled "[Quick Link to Discussion Report etc.](#)" includes more detail about these options.

In addition the section titled "[Key Performance Indicators](#)" describes how to produce documents in Microsoft Word that are designed to help you to plan to succeed.

The side-bar provides additional links under the Data Exchange option.



The *Import Records* option reads Microsoft Excel files as well as .CSV files.

The option *Export to CSV* creates CSV files which subsequently can be used for analysis in

Microsoft Excel or your preferred Spreadsheet program. The exported file can also be used for Mail-Merge in MS Word or your preferred Word Processor. This option exports the data in all of the fields.

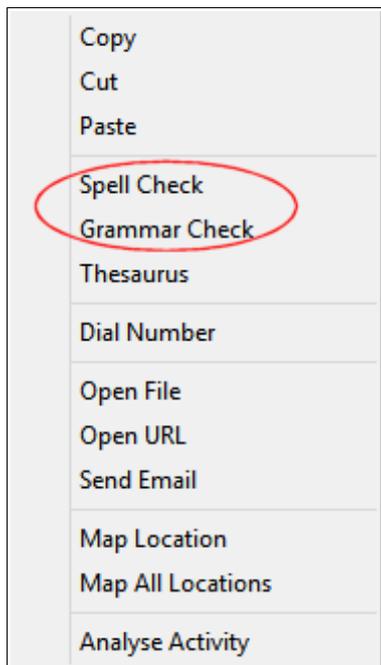
The option *Export Custom Extract* invokes a utility that enables you, initially, to choose the fields that you wish to export to MS Excel and then to specify the selection criteria to be used. For example, you may want to identify people for whom you have no email address, or you may want to find the companies in a particular town. The utility enables you to select fields using pictorial copies of the fields as displayed in the Contacts form.

The *Sync with Google Calendar* and *Sync with Outlook Calendar* options transfer data to Google Calendar and to the Standard Calendar of Microsoft Outlook respectively. Tasks that have the Sync flag checked are transferred. In addition the contact details for the associated People are also transferred to Microsoft Outlook.

Once you have synchronised your database with a Calendar you are then only one step away from synchronising your database with your mobile device (telephone, pad, etc.).

Use the software that is specific to your device to synchronise its data with the Calendar.

You can also employ the *Spell Check* and *Grammar Check* of Microsoft Word.



With the cursor located in a Text Field click on the *Edit* button to enable data changes. Then use the Right-Click of your mouse to reveal the pop-up menu.

Select either *Spell Check* or *Grammar Check* to validate the contents of the selected field.

## Integration with Other Systems

Tasks can be copied as Events in a **Google Calendar** by using the synchronisation option in the side-bar.

The *Sync with Google Calendar* option transfers Task details to your chosen Google Calendar.

*NB: In order to link your TBF CRM 4D database with your Google Calendar you will need to create **credentials** to allow the program to update your Calendar. This one time option ensures that your log in details are not revealed to the program. The program provides full instructions for creating and saving your **credentials**.*

Once you have synchronised your database with a Calendar you are then only one step away from synchronising your database with your mobile device (telephone, pad, etc.).

Follow the one time synchronisation steps on the Google Calendar web site. This will match the entries in your online Google Calendar with the Calendar in your iPhone or Android device.

**Google Maps** is used to display the location of a Place. This link is triggered either by double-clicking in the Post Code field or by selecting a Post Code and using the appropriate entry in the popup menu.

**Google Maps** can also be used to populate address fields using the Post Code as a starting point. Place the cursor in the Post Code field, right-click with the mouse, and select the option to *Look up Address using Post Code*.

The web site of the Place can also be viewed in **your preferred web browser**. Either double-click in the Web Site field or select the URL and use the appropriate entry in the popup menu.

In a similar way **your preferred email client** can be triggered by double-clicking in the Email field or by selecting an email address and using the appropriate option in the popup menu.

The **Bulk Mail** option is found in the side bar under Data Exchange. This option guides you through the steps required to create your own list of email addresses. The final step triggers MailChimp, a well known bulk mail facility. However, having created your list of email addresses you can use these with your preferred bulk email service.

If a modem is fitted a telephone number can be dialled by double-clicking in the relevant telephone number field. This triggers the operating system's **telephone dialling** mechanism.

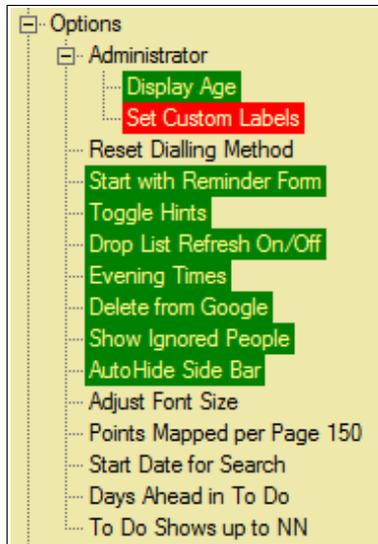
If you have **Skype** operating on the PC you can double-click in the Skype Name that is found in the People tab. This will trigger a Skype call to the selected name.

*Note that you may need to open Skype in order to "allow access" to TBF CRM 4D.exe*

## Customising TBF CRM 4D

### Options

To configure TBF CRM 4D to suit your requirements click on Options in the side-bar.



The first option is *Display Age*. This determines whether the age of a person is displayed when their birth date exists in the database.

Select *Set Custom Labels* to allow you to alter the description of the fields on the form. See the section Using Your own Terminology

Choose *Reset Dialling Method* to revise the method used for dialling telephone numbers.

Selecting the *Start with Reminder Form* reduces the screen real estate used when the program starts.

The *Toggle Hints* option determines whether the in line and popup hints are displayed or hidden.

The option *Drop List Refresh On/Off* affects performance during database updates. It determines if the values in drop lists are updated following record changes or additions.

When the program validates Alarm Times the default “end of day” is 16:45. Times after this curfew cause the Alarm Day to be incremented and the Alarm Time to be set to 09:00. The option *Evening Times* enables you to schedule Tasks to fall due up to midnight.

When you select the 'Data Exchange' option to 'Sync with Google Calendar' you can choose to

have completed Tasks deleted. To enable this option select *Delete from Google*. Note that you will be asked to confirm each individual delete.

*AutoHide Side Bar* determines whether the Side Bar reduces in size when the mouse is in the left-hand panel. This option helps to reduce the screen real estate that the program requires.

*Adjust Font Size* enables you to alter the size of the text that is displayed. You can increase or decrease the size by increments of one. Note that the program does not limit the size you choose so you may make the text illegible.

When using the popup menu option to *Map All Locations* you can choose the maximum number of points to be plotted. If there are more points selected than this maximum, TBF CRM 4D will create a new page after the maximum has been reached. To alter the maximum, use the *Points Mapped per Page* option. Note that the current maximum is shown in the description.

The *Start Date for Search* option can be a number or a date.

If a number is entered this will be the number of months of data that will be included. It provides a rolling start point. For example a value of 3 will include the previous three months. A value of 99 includes all records in the database.

If a date is entered this will be the fixed start point for the search.

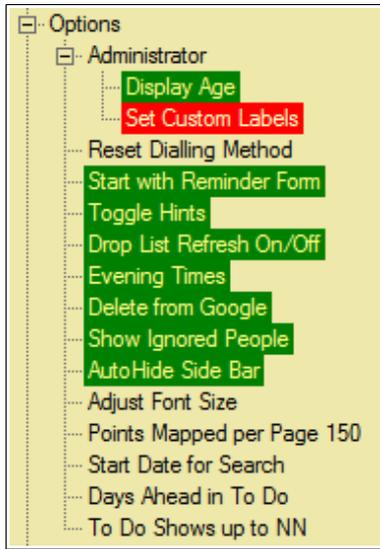
This option also affects the Tasks that are included in the To Do List.

The option *Days Ahead in To Do* increases the number of records in the To Do List by including Tasks that will fall due N days after the current date. For example a value of 1 will include Tasks scheduled for tomorrow to be included in the To Do List.

The option *To Do Shows up to NN* limits the number of Tasks in the To Do List to NN. For example a value of 10 will only show the top ten entries in the To Do List.

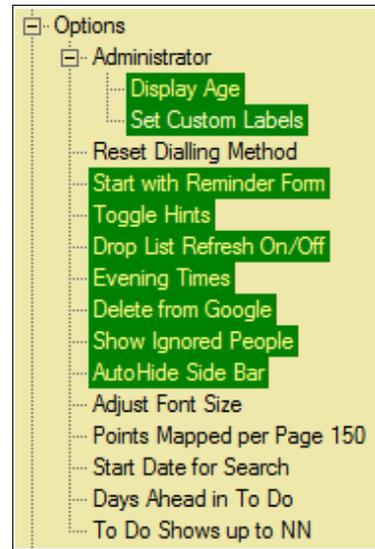
*Using Your Own Terminology*

To enable this option click on the *Set Custom Labels* option



same directory as the database. Therefore, if you store different databases in separate directories you can have distinct labels per database.

To change the prompt back to search mode, click on the option *Set Custom Labels* again. It turns red to indicate that it is disabled.



then click on the Field Name (Label) that you wish to change. The prompt at the top of the side-bar is revised and reflects the field name that you selected.



The illustration above shows that the field labelled *Line 1* has been selected.

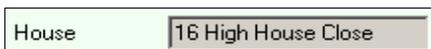
Type the new name and hit the Enter key.



The field name changes from



to



If you wish to reset the field name back to its standard value, leave the new name blank and hit the Enter key.

If you wish to rest ALL of the field names back to their standard values, hit the Reset button.

**Hint**

**The set of Custom Labels is stored in the**

To customise the field names in the form that combines data entry for a Person and Place, proceed as follows.

1. Click on the option *Set Custom Labels*
2. Select the side-bar option to open the *New Person & Place* form.

## Projects – Monitor Progress

The Projects tab is where you can record the progress of a project.



*Projects* are linked to a *Place*.

Each *Place* can have a number of *Projects*. However, the name of the *Project* must be unique for each *Place*.

TBF CRM 4D does not try to perform a project control function but it does enable you to record the milestones as they are achieved. This monitoring process enables analyses to be performed and reported together with other metrics about the *Places* and *People* in the database.

You can record further detail for your analyses by linking *Tasks* to the *Project*. With this linkage established you might count the number of activities required to move from one step to another as the *Project* progresses.

The default field names in the *Projects* tab are typically used to map the buying and selling cycles of a sales campaign. (These steps are also recorded in the standard Discussion Report available via the *Tasks* tab.)

By customising these field names you can adapt the system to suit your own project monitoring.

Examples of other types of project that could be tracked are illustrated below.

- Induction of new staff
- Patients recovering from an operation
- Training for an event
- Developing computer software

### Key Performance Indicators

The application includes a facility to maintain a library of Goals. These Goals might be personal objectives or they might be Key Performance Indicators for your business.

To reveal this library click on the Goal List item



in the side bar.

A form is opened that lists each of the Goals and provides a mechanism for editing them.

Two parameters of each Goal are significant. These are measures of the “usefulness” and the “difficulty” of each Goal. Both are graded between one and ten where ten is the highest grade.

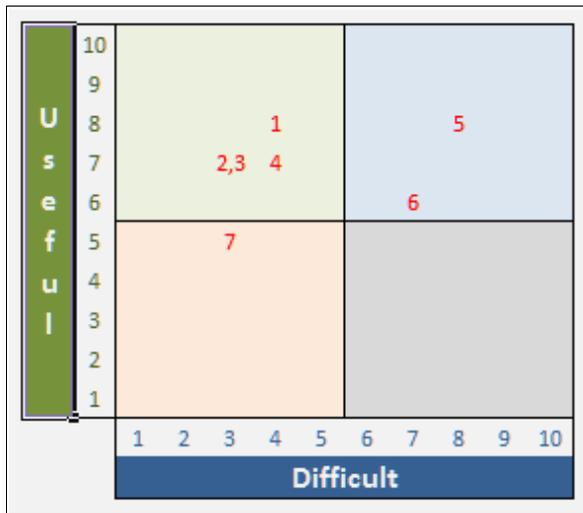
So a Goal that would be really useful to achieve and has medium difficulty for achieving success might be graded 8, 5.

The significance of these grades is revealed when the button



is selected.

This paints each Goal in a matrix and illustrates the relative value of each Goal.



The numbers in the matrix represent your list of incomplete Goals.

A sample list of Goals is shown below.

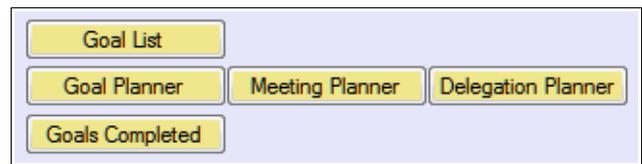
- | Legend |                                    |
|--------|------------------------------------|
| 1      | OOO Donation - 2                   |
| 2      | K2A Training - 4                   |
| 3      | K2A Boot Camp - 4                  |
| 4      | Order the Aston Martin DB 9        |
| 5      | Buy a house in South Africa        |
| 6      | Lose a stone in weight             |
| 7      | Take Jackie back to The Seychelles |

The quadrants in the matrix are allocated the following classifications.

	High Value - Low Difficulty	Do Now
	High Value - High Difficulty	Do Later
	Low Value - Low Difficulty	Defer
	Low Value - High Difficulty	Delete

In this way TBF CRM 4D helps you home in on the activities that will deliver the best benefits at the earliest opportunity.

A full list of your Goals, together with other documents to help you to Plan to Succeed, are available by clicking one of the appropriate buttons pictured here.

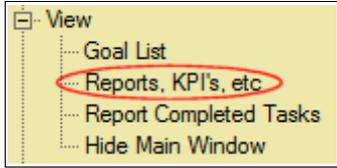


These documents are produced in Microsoft Word and therefore can be adapted to suit your own preferences.

Reports

Graphical View of Activities

A standard set of reports can be viewed with the option in the side bar.



Note that this option is available as a chargeable add-on.

Selecting this option starts the KPI Utility which asks for a Date Range. You can enter start and end dates to narrow the scope of the reports.

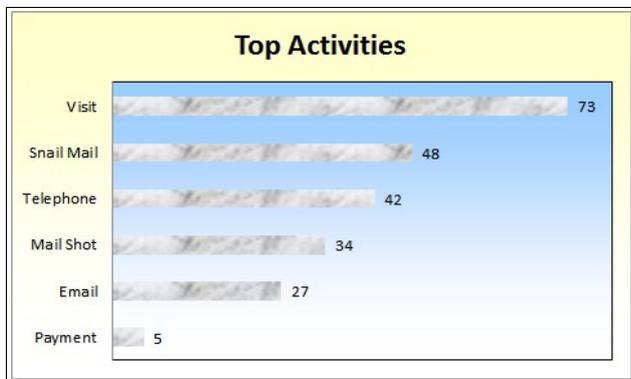
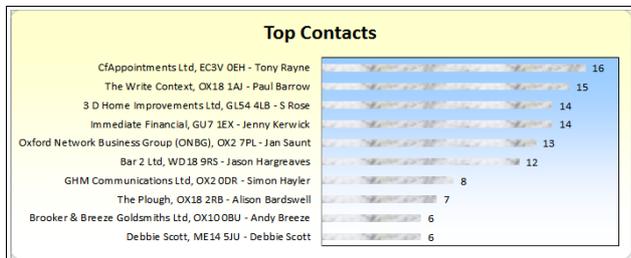
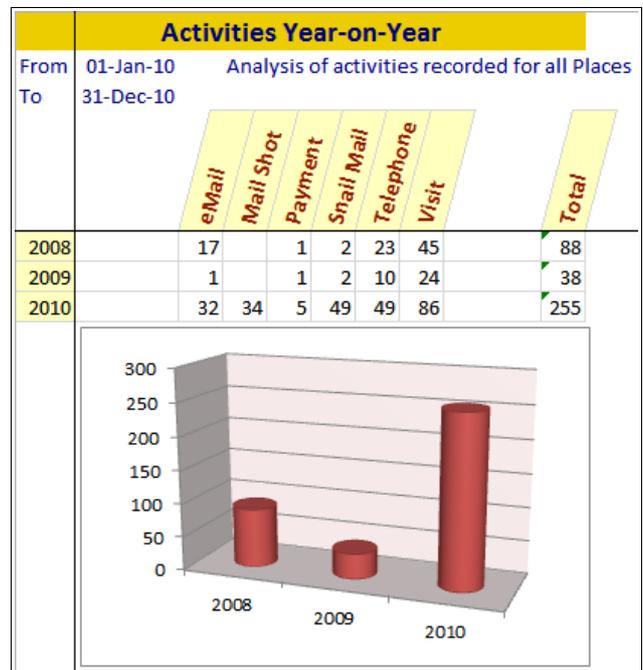
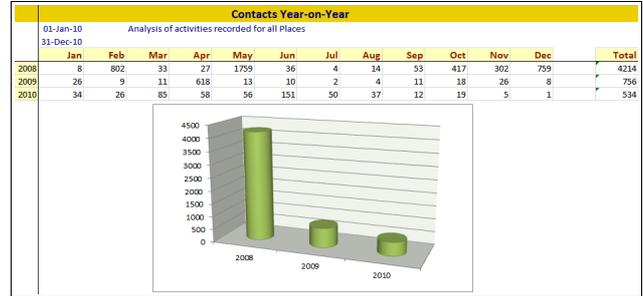
There are three reports available. The first is a list of People together with a count of their Tasks within the date range. The second is a count of the Activities (Type of Task) and the third is a list of the Resources and their frequency of use.

Each report is shown in Microsoft Excel. The charting facility is used to highlight the top ten in each report.

Illustrations of these reports are shown below.

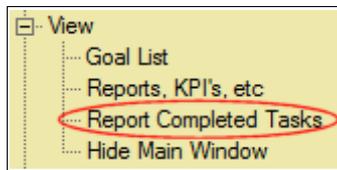
If the selected date range is not greater than a year, the KPI Utility also produces Year on Year counts for Contacts and Activities.

Following are samples of these outputs.



## *Simple List of Completed Tasks*

You can see what work has been done for a period using this option in the side bar.



When this option is selected a form is displayed that enables you to select the period in which you are interested.



Once you have selected the date range TBF CRM 4D copies a summary of all of the Tasks that have an entry in their “Done” date into Microsoft Word and then displays this document by starting MS Word.

**Analyses**

The Reports option provides useful data but only provides a date range selection as a means of customising the outputs.

Suppose you want to know the people who, for the second quarter of the year, have generated the most activity working for companies in London.

To perform this analysis proceed as follows.

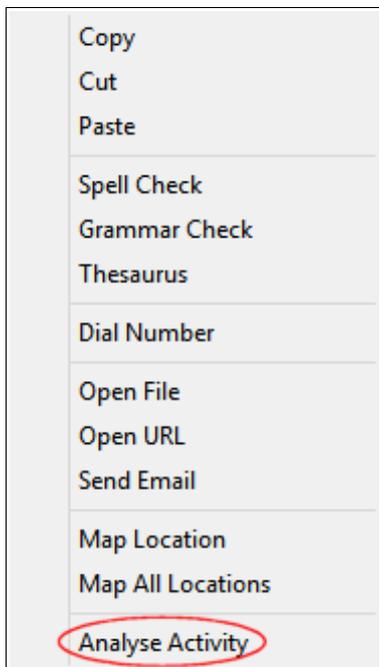
**1. Select companies in London.**

In the Places tab insert the cursor in the “Town” field and type “London” in the search argument.



**2. Analyse by person.**

In the People tab right-click in the name to reveal the following popup menu.



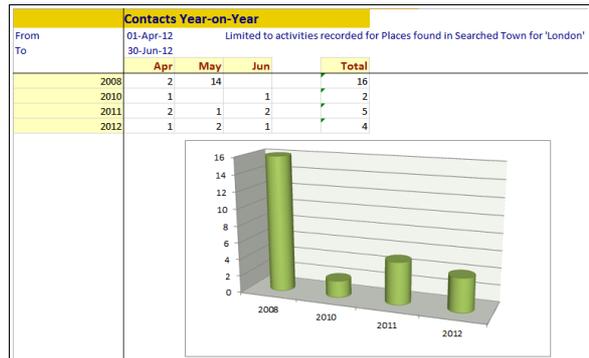
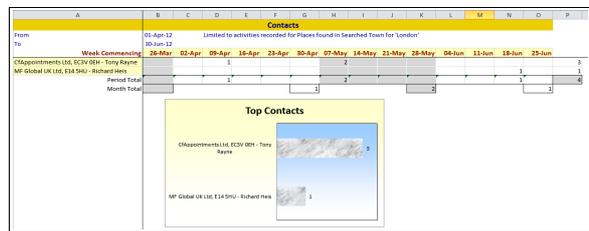
Select “Analyse Activity” to start the TBF KPI Utility.

**3. Extract details for Q2**

When the TBF KPI Utility presents the Date Range selector, enter dates for the second quarter.



An example of the outputs is shown below.



Examples of other analyses that can be achieved using similar procedures include.

- Which counties require extra work in order to expand the customer base?
- What is the Job Title that makes the most purchase decisions in our favour?
- What are the most frequent complaints about our products or services?
- How long does it take to get a purchase decision?
- From which market sector do we win most of our business?
- One use of the system is to hold details of patients suffering from cancer. The system can produce figures for survival rates.

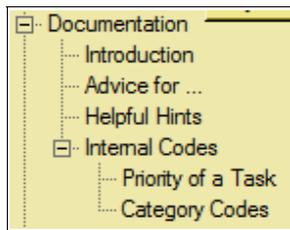
## Note 1

This *Analysis* option uses the results of your search criteria to limit the “Places” that are included in the analysis. This is true no matter how complex your search has been.

## Note 2

Some fields are not permitted for use in the TBF KPI Utility. These fields are identified with a *misty rose* background.

## Documentation



The documentation available for the product can be found by expanding the *Documentation* tab in the side bar.

- **Introduction**  
Displays the document that was displayed when the program was first launched.
- **Help Hints**  
Shows the Help File
- **Priority of a Task**  
Describes how the Priority of a Task is determined using the *Important*, *Urgent* and *Delegate* options.
- **Category Codes**  
Illustrates the predetermined values for the Category drop-lists.

## Frequently Asked Questions (FAQ)

Question	Answer
I've got this history of contacting different companies. Where is the best place for me to store the details?	The structure of the database allows you to store details of a place (for example the address) and link people to that record. You then store distinct tasks for those people in records that are linked back to the place.
I want to record where I first met the person. Where should I store that information?	There is no hard and fast rule for this. You could use the type of place, the industry or sector fields. Or you could store this information as a note against the person. Alternatively you could enter a "Met at Microsoft" task that includes a date of the meeting and an alarm for when to follow up. Every one of the fields identified above is researched by the Intelligent Search facility.
Some of my Contacts perform a specific role for me. For example, some are Introducers and some Lend Finances to my customers. How can I use the Status field to identify them?	The Status field has pre-defined values. The best place for this type of information is the Type field of the person record.
When I'm entering a new Activity (say I've just spoken to someone and agreed to visit them) do I have to enter two Tasks in the database? One for today's discussion and one for the planned visit.	That is an option although you'd probably want to 'complete' the discussion task as soon as you enter it. It may be easier to enter the discussion as "On 25 Dec 2010 talked to Father Christmas ..." and allocate a date and time for the follow up action.
I've just completed a Task that appeared in the To Do List. How do I change its Status to Completed so that it no longer appears? Should I set the Status to D – Deleted?	No. Changing the Status to 'D' (Deleted) means that the record will be removed from the database when you next Purge. To complete a task put a date in the <i>Done</i> field of the task.
How do I import the history that I've been keeping?	Use the Import Utility.
I have records of the telephone calls, emails and letters that I've sent to a company. When I add them to the CRM system how do I link them to that company in the database?	This is done automatically if you import the data. Alternatively add a Place record containing the company details, then add People records linked to that Place. Finally add new Tasks for each of the People.
What is the meaning of the different Status Codes?	Double-click in the Status field for an explanation.
My old system used Keywords for searching. I'm familiar with those keywords. Where can I store them in your CRM system?	Keywords of this type usually identify a Place. For this reason it is best to store these Keywords as a Note attached to the Place.
I've just sent a letter to somebody. Can I store a copy of that letter in the database?	Yes. Double-click in the Path to File field and store the path to the document. Later, double-click that path to display the letter.
How do I extract email addresses and use them for bulk emailing?	Use the "Search" options to identify the people who wish to email. Use the "Export to CSV" option to create a file of emails. Edit the exported file if required. Finally use the "Bulk Email" option to compose and send the emails.
I've just sent a mail shot. How do I store a copy of it in the database and make sure that I follow-up with each recipient?	To create follow up actions after a mail shot, use your spreadsheet program to populate the "Task" columns (these are on the right hand side of the exported file). Then import these task details.
What are Categories used for?	Categories provide an indication of when the project is due to complete.
Is it possible to link two or more companies?	Each subsidiary company or branch office can contain a link to its parent company. The head office Place is selected from the Parent drop list.
Is there a field for a mobile phone as well as a land line?	Yes. It is located in the People tab.

Question	Answer
How do I prepare a report of all emails?	<ol style="list-style-type: none"> <li>1. Open the People record tab</li> <li>2. Position the Cursor in the email field</li> <li>3. In the <i>Select 'Email' for</i> field type Is NOT NULL and hit the Enter key</li> <li>4. Click the <i>Export to CSV</i> button to create a .CSV file</li> <li>5. In your spreadsheet program edit the exported file to remove people with no email address</li> </ol>
Does a To Do Item automatically generate an alarm?	<p>The To Do List refreshes automatically every five minutes. It includes tasks that will fall due within the next fifteen minutes.</p> <p>If, when it refreshes, the list of tasks has changed an audible alarm sounds.</p>
Can I track the finances of a project (and invoice by instalments)?	<p>The application does not provide a facility to manage the finances of a project. However, project milestones may be registered and links to Invoice (documents) can be stored.</p>
What file types can be imported?	<p>The import utility will read Microsoft Excel worksheets and Comma Separated Values (.CSV) files.</p>
What file types can be exported?	<p>The export function creates a Comma Separated Values (.CSV) file and opens it with your preferred spreadsheet program.</p>
Are duplicate records detected automatically?	<p>Duplicate Place and People records are not detected when details are added manually.</p> <p>The import utility <i>adds</i> new records and <i>updates</i> existing records.</p> <p>Alarms for Tasks cannot be duplicated. The system automatically bumps a duplicated alarm by five minutes.</p>
What is the significance of the colours of the backgrounds?	<p>The background for Place details is green.</p> <p>The background for People details is pink.</p> <p>The background for Task details is blue.</p> <p>Fields that can be analysed within the TBF KPI Utility have a background of light green.</p> <p>Fields that are exempt from analysis by the TBF KPI Utility have a background of misty rose.</p>
Is there a limit to the number of Place, Person or Task records?	<p>In that the capacity is not infinite – yes, there is a limit. Is it defined? No.</p> <p>The database engine limits the total size of the database to two gigabytes. However, this embraces every data item – Project, Place, Person, Task, Goal, indexes, internal linkage control, etc. etc.</p> <p>The development team has used a database with 20,000 Place records during the volume testing stage. Even with this data volume (and accessed over a network) performance of the intelligent search was acceptable.</p>