

*Commence<sup>®</sup> Application Suite*  
*RM Version 2.1*

**GETTING STARTED GUIDE**

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# Chapter 1: Introduction

## Customer Relationship Management

Customer Relationship Management (CRM) is all about building meaningful, long term business relationships with your customers. By helping you to better understand and anticipate their needs, CRM can help you to acquire new customers, retain existing ones and maximize the lifetime value of your business relationships.

The Application Suite has been designed with this in mind. Whether your “customers” are internal or external, Commence automates the process of interacting with them.

The success of your business in the new millennium may depend on how your company manages, processes and uses information to serve your customers. With the Commence Application Suite you can be assured you have the right solution for building customer loyalty and increasing customer satisfaction.

The Commence Application Suite will give you the edge you need to stay out in front of the competition -- because your customers are too important to lose.



# Chapter 2: Installing Commence

## Overview

The Commence Application Suite is designed to operate in either a standalone or network environment. The installation procedures in this chapter are organized into several different sections. Determine which type of installation best applies to you then follow the instructions in that section.

## Starting the Installation

Close all other programs and reboot the PC. Verify that no Microsoft Office applications are running. For Windows 2000 or XP, verify that the user has administrator permissions to the local computer.

Insert the Commence compact disc into your CD-ROM drive. The compact disc will start automatically and the Commence Application Suite installation screen will appear. This screen allows you to select the installation most appropriate to you. You may select **Network Install** or **Standalone Install**.

If you choose a Network Installation four selections will appear: **Commence Server**, **Network Tools**, **Commence Client**, and **PalmPilot Link**.

If you choose a Standalone Installation two selections will appear: **Commence Client** and **PalmPilot Link**.

## Network Install

Network Install
Commence Server
Network Tools
Commence Client
PalmPilot Link

By selecting the **Network Install** option, Commence will be installed in a network environment which is used to share information between multiple users. Network installations require one PC to be designated as the **Server** PC. All other PC's in the workgroup are designated as **Clients**.

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**Note:** Please refer to the Commence Server Guide before selecting this option. To access this guide, click on the "View Documentation" button. Detailed instructions are provided for the proper installation and configuration of the Server software.

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To begin, select the PC which will be designated as the Server PC, then click on the **Commence Server** button to begin installation of the Server software. This installation will allow multiple client PC's to share database information over a Local Area Network (LAN), via electronic mail, or over an Internet FTP site.

If you have selected a Network Install, the **Network Tools** button will appear as one of the installation options. By clicking on this button you will begin the installation of the Workgroup Expert software. This software is used to monitor the performance of the Commence Server and associated Clients and may only be installed on the designated Server PC.

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**Note:** Use of the Workgroup Expert software requires a MAPI 32-bit E-mail application. Please review the Workgroup Expert Guide for more information on installation and configuration of this software. To access this guide, click on the "Browse CD" button. Open the "docs" folder and double-click on *wgxguide.pdf*.

---

The **Commence Client** button should be selected for installation of the Client software. This installation should be run at each PC that will be connected to the Commence Server. The procedure for installation of the Client software in a network environment is outlined in this chapter.

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**Note:** The Client software may be installed from a network drive. See "Setting up clients from the network" on page 12.

---

If you are using a Palm™ handheld you may choose to have it synchronize with your Commence software. By clicking on the **PalmPilot Link** button you will begin the installation of the

synchronization software. This installation will be required for each Palm handheld user who wishes to synchronize with the Commence Applications.

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**Note:** Please review the *PalmPilot Link Users Guide* for software requirements and further information on installation and configuration of this software. To access this guide, click on the "Browse CD" button. Open the "docs" folder and double-click on *pplguide.pdf*.

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## Standalone Install

Standalone Install
Commence
PalmPilot Link

By selecting the **Standalone Install** option, you will be installing Commence on a single PC. Click on the **Commence** button to begin the installation of the software. The procedure for installation of the Commence Applications in a standalone mode is outlined in this chapter.

If you are using a Palm handheld you may choose to have it synchronize with your Commence database. By clicking on the **PalmPilot Link** button you will begin the installation of the synchronization software. This installation will be required to synchronize data with the Commence system.

## What Is Needed to Run Commence

The Commence Application Suite requires an IBM or compatible personal computer running a supported version of Windows (see Table 2-1). Memory requirements vary slightly depending on which version of Windows is in use.

The requirements for a standalone installation or for a client in a network installation are as follows:

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**Note:** The requirements for a server installation are provided in the *Commence Server Guide*.

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## System Requirements

**Table 2-1: System Requirements**

Hardware	<ul style="list-style-type: none"> <li>• 133 MHz processor or better</li> <li>• 40MB free hard disk space (minimum to install)</li> <li>• a Windows supported pointing device is highly recommended but not required</li> <li>• CD ROM drive (on at least one PC)</li> </ul>
Operating System	<ul style="list-style-type: none"> <li>• Microsoft® Windows XP Professional and Home Edition</li> <li>• Windows 2000® Professional and Server</li> <li>• Windows® NT® 4.0 Workstation and Server, with latest service packs</li> <li>• Windows® 95, 98, 98SE, or ME</li> </ul>
Memory	<p><b>for Windows NT 4.0, ME, 98/95:</b></p> <ul style="list-style-type: none"> <li>• 32MB (minimum)</li> <li>• 64MB (recommended)</li> </ul> <p><b>for Windows 2000:</b></p> <ul style="list-style-type: none"> <li>• 64MB (minimum)</li> <li>• 128MB (recommended)</li> </ul> <p><b>for Windows XP Home and Professional Edition:</b></p> <ul style="list-style-type: none"> <li>• 64MB (minimum)</li> <li>• 128MB (recommended)</li> </ul>

## Compatibility

The following software products have been tested for compatibility with the Commence Application Suite.

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**Note:** Support for additional products and versions may be available. Check the Commence Corporation Web site for updated information.

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**Table 2-2: Recommended Software and Devices**

Feature	Compatible choices
E-Mail Integration	<ul style="list-style-type: none"> <li>• MAPI-compatible</li> <li>• VIM-compatible</li> </ul>
Fax Integration	WinFax PRO™ 4.0 or later version
Word Processor Integration	<ul style="list-style-type: none"> <li>• Microsoft® Word XP, Word 2000, Word 97</li> <li>• WordPerfect 8.0, 7.0, 6.2, 6.1</li> </ul>
Web Integration	<ul style="list-style-type: none"> <li>• Internet Explorer 4.0 or later</li> <li>• Netscape 4.0 or later</li> </ul>
MAPI Address Book	32 bit MAPI-compatible application such as Microsoft Outlook®
Workgroup Expert (Network Tools)	32 bit MAPI-compatible application such as Microsoft Outlook®
OLE DB/ODBC Support	Microsoft Data Access Components version 2.1 or later
Handheld Link	Palm handheld or compatible handheld device
Outlook Integration	Microsoft Outlook 98 or later, with Collaboration Data Objects (CDO)

## Outlook E-mail Logging Support

The E-mail logging feature requires that the following components are already installed:

- Collaboration Data Objects (CDO) library

CDO is a component included with Outlook 98 and later, but it is *not installed* by default. Use **Control Panel -> Add/Remove Programs** to update your installation of Microsoft Office. Choose to "Add or Remove Features" for Microsoft Outlook for Windows. Select Collaboration Data Objects from the list of features then select "Run from My Computer". This will install the necessary libraries needed to work with the Commence Application Suite.

## What Is Needed for OLE DB/ODBC Support

The OLE DB/ODBC support in Commence requires that the following components are already installed:

- Microsoft Data Access Components 2.1 or later

These files can be accessed from the Microsoft.com web site at <http://www.microsoft.com>

For Windows 95 users, an additional update is also required in order to install the Microsoft Data Access Components. The DCOM95 v1.3 update is already present on your system if you are running Internet Explorer 4.0 or later. This file can also be downloaded from Microsoft's Web site.

## What the Installation Does

The Commence installation accomplishes several things:

- The **Commence program** (EXE) is uncompressed and installed to the Commence program directory.
- The **Customer Relationship Management Applications**, if selected, are uncompressed and installed.
- The **Tutorial** database, if selected, is uncompressed and installed in a subdirectory of the Commence program directory. The Tutorial database contains a sample of the Customer Relationship Management applications, as well as examples that take advantage of the new features in the product.
- **Word processor macros**, if selected, are installed to the appropriate folder for your word processor.
- **Commence Connect for E-Mail**, if selected, is uncompressed and installed to the Commence program directory. Connect simplifies E-Mail marketing campaign delivery and literature fulfillment to your Commence contacts.
- Shortcuts to all necessary Commence **documentation** including this manual, the Getting Started Guide, are placed on the Start menu.
- Other components, if not found on the PC, are installed. Such components include ActiveX Controls (OCX), Windows Telephony (TAPI) and several Dynamic Link Libraries (DLLs).



# Default Installation

The following procedure will be used to install the Commence Application Suite as a standalone product or as a client in a network installation and should be used for both a new installation or a re-installation.

- 1 Click the appropriate button (**Network Install** or **Standalone Install**) to select which software to install.
- 2 Select **Commence** or **Commence Client** to begin the standalone or client installation.
- 3 The Software License Agreement will be displayed. If you agree to abide by the terms of the license agreement click **Yes** to continue. **Clicking No will cancel the setup operation.**
- 4 You will be prompted to enter your user Information. You must enter a valid Commence license number in the box labeled **Serial:**. This number can be found on the front cover of this manual. After all the information is correctly entered, click **Next**, then click **Yes** to confirm your registration information.
- 5 Select **Next**. Follow the instructions on the screen and enter the requested information.

# Launching Commence

Perform the following procedure to launch the Commence Application Suite.

From the **Start** Menu, select **Programs -> Commence Application Suite-> Commence**.

# Installing Commence to a different directory

This section describes how to setup Commence in a new directory while maintaining an existing Commence installation from a previous version. This type of parallel installation gives you the flexibility to try out the new features in Commence before upgrading and converting your live databases. New shortcuts for Commence will be added to the Windows Start menu. The existing Commence shortcuts will continue to launch the previous version of Commence.

Once you are ready to upgrade your previous installation you can uninstall Commence then reinstall over the previous version.

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**Note:** *If you choose not to overwrite a previous installation of Commence, then Commence will not upgrade your program files from the earlier release and your existing databases will not be converted. Any custom databases from the previous installation will not automatically be accessible in Commence.*

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- 1 Follow the steps in the section titled “Default Installation” on page 9.
- 2 Take special note when the Setup Type screen appears. By default the Destination Directory will be the same as your existing Commence program directory. Select **Browse** and change the path to a new empty directory. If the directory does not exist, the installation will create it for you. Click **OK** to return to the Setup Type screen.
- 3 Follow the remaining on-screen instructions, clicking **Next** after each step. Press **Finish** to complete the installation.

## Upgrading from Commence RM

If Commence RM is already installed on your system, the **Commence program files** should be installed over the previous installation for best results. Some pre-installation cleanup should be performed to remove any shortcuts that refer to the prior version of Commence. New shortcuts will be created upon successful completion of the Commence installation so it is not necessary to keep the existing shortcuts for the prior version.

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**Caution:** *Do not attempt to uninstall prior versions of Commence either before or after installing the new version. Do not rename or delete any Commence program files. Doing so may result in a loss of data.*

---

When upgrading a shared database, the proper procedure is to upgrade the Commence server first, then each client. Refer to the *Server Guide* for detailed steps to upgrade a Commence workgroup.

Upgrading is a two-part process. Installing the Commence program files updates your Commence platform so you can begin to take advantage of the new features immediately.

The next recommended part of the upgrade process is to update the Customer Relationship Management Applications to include the new features. Your existing Commence database is upward compatible with Commence Application Suite RM version 2.1 without any further conversions. However, your database will not automatically include any enhancements when you first open it in this new version. This requires additional steps which are outlined in the Implementation Guide.

## Converting data from other applications

This section discusses how to convert data from prior versions of Commence, as well as from other applications from which data may be exported.

### From prior Commence versions

Commence automatically converts the data when a Commence 4.0, 4.1, or 2000 database is first opened in Commence. Data converters for versions of Commence prior to 4.0 are not included with Commence. Upon opening the database, Commence will determine if the database can be converted. If the conversion encounters an incompatible version or any other problems, additional assistance will be necessary. Contact Commence Sales for information about available support options.

### Other Applications

Data from other applications may be converted by utilizing Commence's Import feature. An import template may be created in Commence to accept data from various formats (such as dBASE IV, CSV or ASCII text, and ODBC). Data from other applications can be imported into Commence using the **File -> Import** command. For more information on importing data refer to the "Exchanging Data" chapter in the *Commence User's Guide*. Also check the Commence Web site for related technical notes.

## Setting up clients from the network

The following steps can be used to copy the disk images of the installation files from the Commence CD to a shared drive.

These steps are useful if a large number of users need to be installed or upgraded. It may be more efficient to run the setup files from a shared drive rather than from the CD.

- 1 Create a new directory on a shared drive. The directory should be given a descriptive name, such as **Commence Application Suite**. This directory will store the entire set of installation files.
- 2 Insert the Commence compact disc into your CD-ROM drive. The compact disc will start automatically and the Commence installation screen will appear.
- 3 Select **Browse CD**.
- 4 Double-click on the **client** folder to open it.
- 5 Press **CTRL+ A** on your keyboard or choose **Edit -> Select All** from the menu. This will select all the installation folders.
- 6 Press **CTRL + C** or choose **Edit -> Copy** from the menu to copy all the selected folders and files.
- 7 Open Windows Explorer. Double-click on the shared drive and open the directory created in step 1 above. Select **Edit -> Paste**.
- 8 Once all the installation folders and files are copied to a directory on the network, double-click on **setup.exe** from the **Disk1** folder to begin the installation.

# Chapter 3: Commence Basics

This chapter reviews the basic concepts in the Commence Application Suite and describes how to perform basic tasks. If you are a new user of Commence read this chapter and take an opportunity to try some of the Practice Sessions found throughout.

## Database Concepts

The components that make up a Commence database are similar to those found in relational databases. The following table identifies some of the common database terms and their equivalents in Commence.

**Table 3-1: Common database terms.**

Relational Database	Commence
Database	Database
Table structure	Category
Table	View
Query	Filter
Record	Item
Field	Field
Join or Link	Connection
Data	Field value
Form	Detail Form
Key field	Name field

## Database

A database is a collection of objects such as categories, views, letter templates, etc. that are used to organize the information entered into Commence. All objects for a particular database are stored in the same directory on the hard drive.

## Category

A category is a container for one or more strongly-typed fields that are used to store data. All data in a particular category shares a common set of fields.

## Connection

A connection is a database object that links two related categories so that items in each category can be cross-referenced more easily.

## Field

A field is an object in a category. Each field appears as a separate box on the data entry form. The information entered into each field is known as the field value. Commence provides many different field types (e.g. Text, Image, Number, etc.) that dictate what type of information can be stored. Each field type has data-entry capabilities and restrictions specific to that field that help to ensure data integrity. For example, only numeric characters may be entered into Number type fields. The Name type field is a special field that stores a unique description of the item used for sorting and indexing the items in that category.

## Detail Form

A detail form is analogous to a paper form or application. It is a screen used for data entry. Each detail form displays the field values for one particular item.

## Item

An item is created when you enter data into each field in a form and save it. For example, every appointment entered is stored as an item in the Calendar category.

## Agent

An agent is a set of instructions that are executed when a given event occurs. The event that causes the agent to run is known as a trigger. The instructions are known as actions.

# What's on the Screen



Figure 3-2: Portion of Commence window (Title Bar, Menu Bar, Command Bar, Agent Bar)

## A. Title Bar

The *Title Bar* is located at the top of the Commence window. It is used to display the *Database Name*. The standard Windows buttons to minimize, maximize, or close an application are located at the rightmost edge of the title bar.

## B. Menu Bar

The *Menu Bar* shows the available command menus and is located directly below the Title Bar.

## C. Tool Bar

The *Tool Bar* initially appears just below the Menu Bar, but its position on the desktop may be changed using Drag and Drop. The Tool Bar displays buttons for commonly used commands, providing the ability to execute these commands quickly by selecting a button with the mouse.

## D. Agent Bar

The *Agent Bar* shows those agents that are triggered by pressing a button on the Tool Bar. Frequently accessed agents are typically located on the Agent Bar to allow them to be easily launched. The placement of the Agent Bar on the desktop may be changed by using Drag and Drop. Custom buttons can be defined and added to the Tool Bar by creating a tool bar pick agent. Refer to the *Commence User's Guide* for additional information about agents.

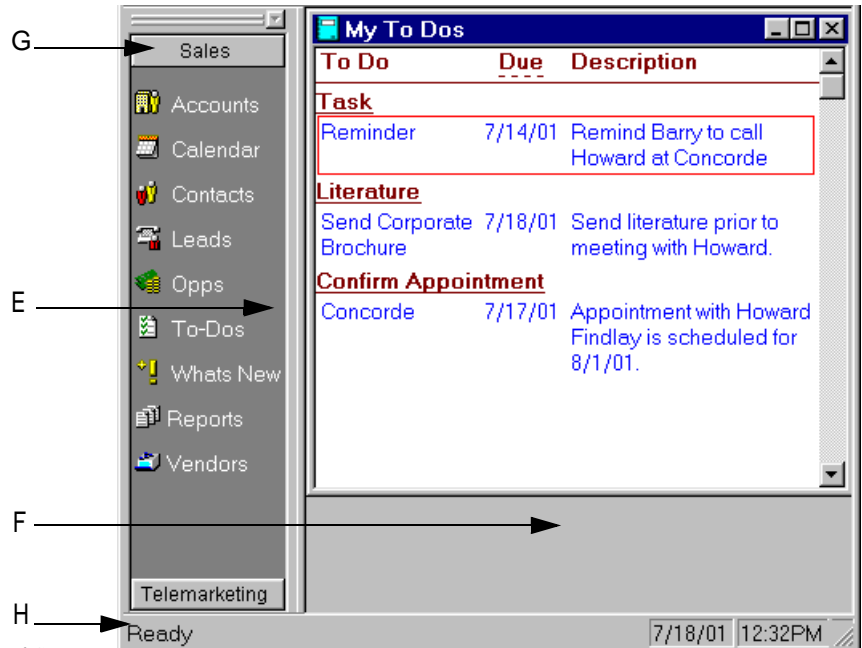


Figure 3-3: Lower portion of Commence window (View Bar, Status Bar, Desktop)

## E. View Bar

The **View Bar** is the column of view icons to the left of the work area. By selecting one of the icons, the view associated with the icon will open. Custom views may be added to the View Bar by editing the view. The view icons are organized alphabetically under each desktop tab.

## F. Desktop

**Desktops** are work areas that let you organize a group of views that all relate to a specific task. For example, a Contact Manager desktop might display your Address Book, Calendar, and Mailing Label views. The desktop background is typically gray but can be changed to any custom color or can be used to display your choice of wallpaper graphics.

## G. Desktop Tabs

You may easily switch desktops by selecting a **Desktop Tab** from the View Bar. Clicking on one of the desktop tabs opens that desktop and displays the set of views that were saved on that particular desktop.



## H. Status Bar

The *Status Bar* is located at the bottom of the work area. It can display any or all of the following information: today's date and time; the number of items displayed in the active view; brief help messages for menus, commands, icons, screen regions, and dialog boxes. It will also indicate if an agent is running.

## Getting Help


Commence offers many ways to obtain help, each of which is described in the following paragraphs.

### The Tutorial Database

Commence provides a practice database called the Tutorial Database. This database may be used to try Commence features without changing data stored in a "live" database. To work with the Tutorial Database, select **Help -> Tutorial Database**.

When finished working with the Tutorial Database, again select **Help -> Tutorial Database** to close the Tutorial Database and return to the "live" database.

### Practice Sessions

The Practice Sessions, noted by , are designed to be performed using the Commence Tutorial Database.

### Balloon Help

Balloon help offers a quick way to determine what actions a button will perform. It is activated when the mouse pointer remains over a button on the tool bar for several seconds.

 Practice

In Commence, move the mouse pointer over several buttons (hold for a second) on the tool bar. Notice the small box that appears.

### Status Bar Help

The Status Bar contains a message area that will display information about a button when the mouse pointer passes over it. The message will indicate the button's function.

 Practice

In Commence, move the mouse over several buttons on the tool bar and the view bar. Notice the messages that appear in the status bar.

## On-line Help

Commence includes extensive on-line help to answer most questions. Information is available on Commence features as well as step-by-step instructions on how to perform a particular task. Perform one of the following steps to access the on-line help:


- Select **Help -> Index** to get to the Index screen.

**OR**

- Select **Help -> How Do I...?** to get help on performing specific tasks.

**OR**

- Press **F1** to get to the Index screen or context sensitive help for the specific dialog box currently being viewed.

 Practice

Press **F1** to access the On-line Help Table of Contents. Select a specific topic, or use the included *Search* command to view desired information.

 Practice

Select **Help -> How Do I...?**. On-line Help is opened to the How Do I? section. From here, step-by-step instructions are provided to perform Commence activities such as working with views or using formatted letters.

## Context Sensitive Help

Context sensitive help can provide information quickly and easily on any topic. Perform one of the following steps to access context sensitive help:

- Press **SHIFT+F1**. The mouse pointer changes to a context sensitive help pointer. Point at the object or command and click the mouse button or invoke the command using the keyboard accelerator.

**OR**

- Select **Help -> Context Sensitive**. The mouse pointer changes to a context sensitive help pointer. Select the object or command and click the mouse or invoke the command using the keyboard accelerator.

**OR**

- In a dialog box, press **F1**.

 Practice

For more information about opening databases within Commence, press **SHIFT+F1**. Click the mouse on the **File -> Open/Manage Database** command on the Menu Bar. Commence Help then opens to the page that describes this command.

## Tips and Hints

Tips and Hints give various suggestions on how to use Commence to its fullest potential. To access Tips and Hints:

- Select **Help -> Tips and Hints**.

## Working with Views

Views display the items that have been saved in each Commence category. A view is used to display data from one or more fields. In the example of a calendar, the fields displayed in the view might be Date, Start Time, and End Time. When a view is opened Commence retrieves the field values for each item in the category and displays those values in the view.

## Updating View Information

As new items are added to the category, all views for that category are automatically updated to include the new item where applicable. Likewise, items that are deleted from one view are also deleted from every other view for that category. Therefore, even views defined weeks ago will always display up-to-date information.

## Active View

The Active View is the single view that is always on top and shows a highlighted item. The Active View's title bar is a different color than the other windows in the work area.

## View Name

The view name is the unique description associated with a saved view. Saving a view preserves the filters, sorts, fonts, field layout, and other attributes that have been applied to a view and displays the saved format each time the view is opened.

## Opening a View

Perform one of the following steps to open a view:

- Click on a button on the view bar.

**OR**

- Select a numbered view from the bottom of the **Views** menu.

**OR**

- Select **Views -> Open/Manage Views**. Open any existing view by highlighting the view name, or create a new view of a particular category.

 Practice

Open the **Views** menu. Select **Employee List**. The report view titled "Employee List" is opened.

 Practice

Click on the Calendar icon on the View bar. The Calendar view is opened showing scheduled meetings and phone calls, vacations, holidays, etc.

## Prefix Matching

Prefix matching allows a particular item to be located within a long list of items in a view or connection. For example, when trying to find *Smith, Paul* in a report view that has 50 Smiths, the correct one can be located by typing "smith, paul". Prefix matching can be used in all view types except the calendar and document view types.

Perform the following procedure to use Prefix Matching

- 1 Type the name of the item which is to be located. While typing, the characters are displayed on the status bar. The highlight bar moves to the first item in the list which contains the string (*Name* field only.)
- 2 To move to the next item which matches the prefix, press **CTRL+N**.
- 3 To cancel the last character typed, press **BACKSPACE**.
- 4 To cancel all characters typed and start the prefix matching procedure again, press **ESCAPE**.

---

**Note:** When searching for an item in a connection drop-down list, press **CTRL+SPACEBAR** to insert a space in the current prefix matching string.

---

## Closing a View

Perform one of the following steps to close a view:

- Click on the close box on the top right hand corner of the view.

**OR**

- Click on the control box for the view, and select **Close**.

If there are any unsaved changes, a pop-up box will be displayed asking if the changes are to be saved, if the view should be closed without saving any changes, or if the close operation should be canceled.

## View Types

The view type determines the view's appearance and what special capabilities it has. Commence has seven different view types.

### Book

The book view looks like a familiar address book. It contains pages with alphabetical tabs that allow for easy selection of a tab in order to see the items beginning with that letter.

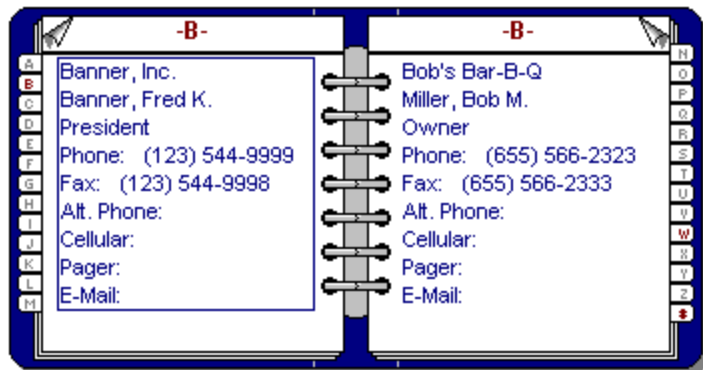


Figure 3-4: Sample book view.

### Calendar

Displays names of items by date and time and displays a busy bar that summarizes the entire day. The calendar view can be displayed in several different modes: Image, Day, Two Days, Week, Two Weeks, Month, Six Weeks, Year, and Grid. A calendar view can be used when there is at least one date field and one time field in the category.

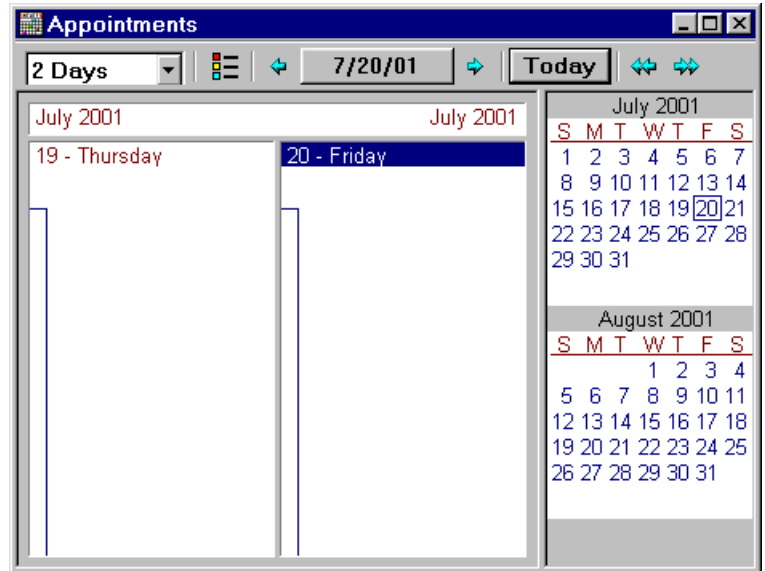


Figure 3-5: Sample calendar view in 2 Day mode.

## Gantt

The Gantt view displays the names of items in a Gantt chart with a duration bar showing the start and end dates. A Gantt view can be used if there is at least one date field in the category.

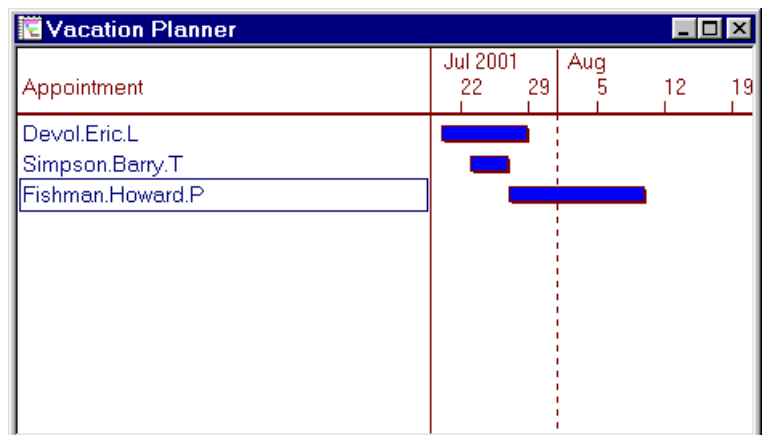


Figure 3-6: Sample Gantt chart view.

## Report

Displays fields from one or more categories in a row-column format. Report views can be displayed in a horizontal format that has all fields next to each other on a line, or in vertical format which displays the items with one field on top of another.



Employee	Type	Extension
Clemens.Andy.K	Salesperson	312
Coldwell.Susan.J	Marketing	312
Devol.Eric.L	Customer Support	209
Eastwood.Alice.P	Customer Support Manager	631
Fishman.Howard.P	Sales Manager	387
Simpson.Barry.T	Salesperson	124

Figure 3-7: Sample report view in horizontal format.

## Document

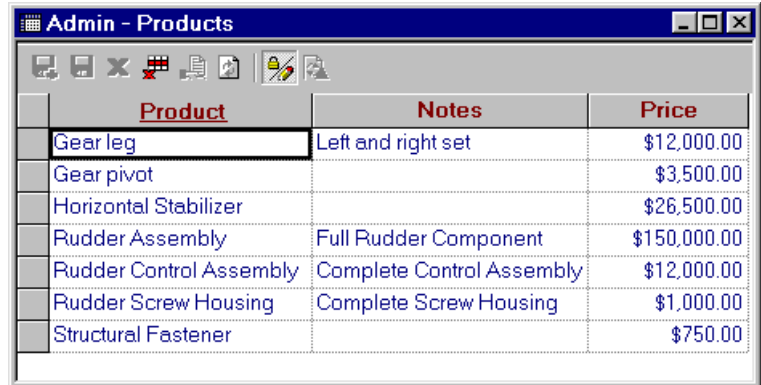
Opens a Web page as a view window on the Commence desktop. The document view displays HTML content by hosting the Internet Explorer Web browser within Commence.



Figure 3-8: Sample document showing home page

## Grid

Displays data in a row/column format. A grid can be used in read-only mode or in update mode. Update mode allows field values to be modified directly without opening a detail form.



The screenshot shows a window titled "Admin - Products" with a toolbar and a table. The table has three columns: "Product", "Notes", and "Price". The data is as follows:

Product	Notes	Price
Gear leg	Left and right set	\$12,000.00
Gear pivot		\$3,500.00
Horizontal Stabilizer		\$26,500.00
Rudder Assembly	Full Rudder Component	\$150,000.00
Rudder Control Assembly	Complete Control Assembly	\$12,000.00
Rudder Screw Housing	Complete Screw Housing	\$1,000.00
Structural Fastener		\$750.00

Figure 3-9: Sample grid view.

## Multi-View

A Multi-View window displays a primary view and one or more secondary views in a split window format. A multi-view window can be split into two panes, either horizontally or vertically. The primary view can be presented as a detail form or a view.

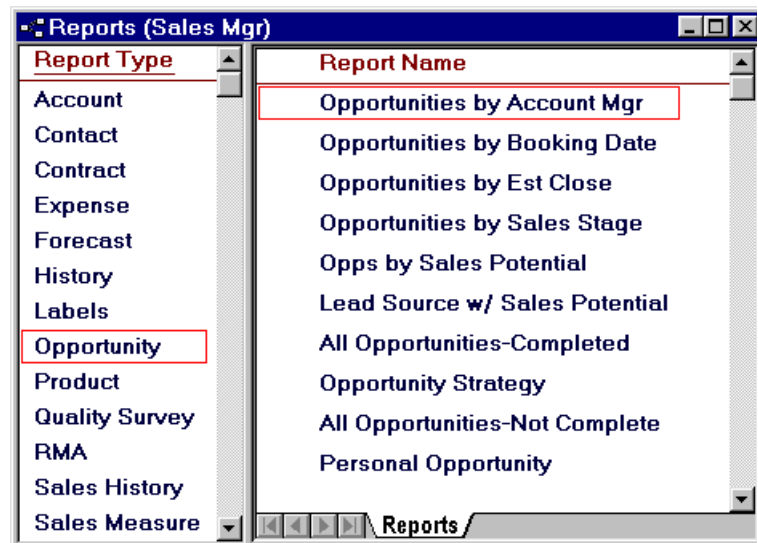


Figure 3-10: Multi-View in vertical format.



## Report Viewer

The Report Viewer displays a snapshot of your Commence data as a formatted report. The report can be saved as an icon on the View Bar and opened for viewing and printing. The Report Viewer also supports WYSIWYG printing and a variety of export formats, including Rich Text Format (RTF), Microsoft Excel Worksheet (XLS), PDF, TXT, and HTML.

The report is formatted using the built-in Commence Report Designer then saved to Commence. The report can display data from a single category in addition to fields from related categories. Formatting options include the ability to change font style and size; create a custom report header and footer; change colors for field values, labels, and backgrounds; insert images, text labels, horizontal and vertical lines, and much more.

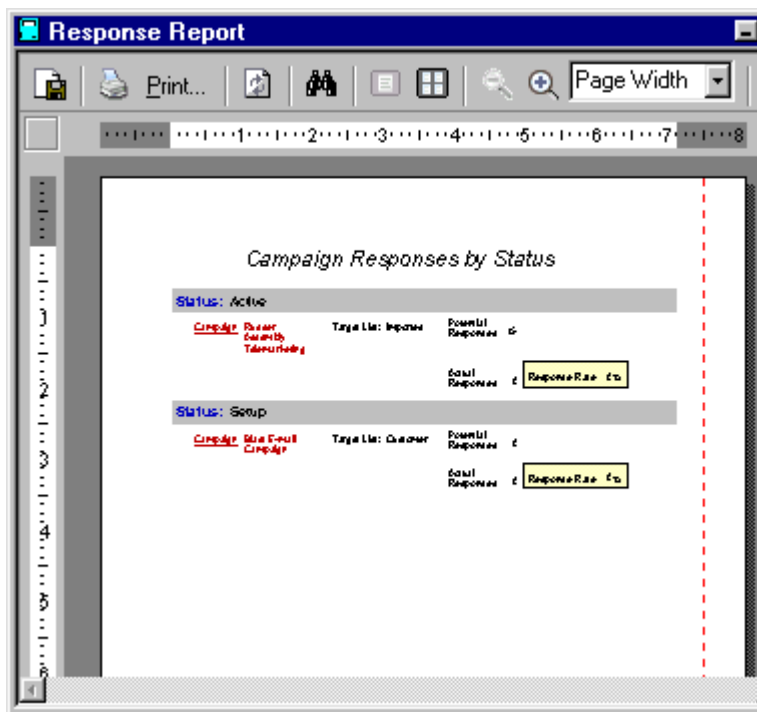



Figure 3-11: Report Viewer sample

# Managing Data

An item is created when you enter data into each field in a form and save it. An item is composed of fields which can contain field values. Some examples of these fields are a Name field (this field must have a value), date, time, number, and text. In the case of the Calendar category, there is one item stored for each meeting entered into the category. The fields in this category include Date, Start Time, End Time, and Duration. Each new meeting added becomes an item in the database within the Calendar category.

## Adding Items

An item is added to a category by entering the data into a Detail Form. Perform one of the following steps to display the Detail Form for any given category:

- Select the  button on the tool bar to add an item to the active view.

OR

- Press **CTRL+A**.

OR

- Right click the mouse pointer on the view to which the new item is to be added. Select **Add Item**.

The corresponding Detail Form is displayed showing the available fields within the category. Enter values in the fields on


the Detail Form. To save the data just entered, select the  button from the form's tool bar. See the following figure.



Figure 3-12: Detail Form toolbar.

---

**Note:** The **Make Shared** option, shown in the above figure as a hand holding a document, is available only in shared databases.

---



Tip

Date, Time, and Number fields are just a few of the field types that have special capabilities. Double click on these fields to get a calendar, clock, or calculator, respectively for help with entering field values.



Tip

The look of a form may be modified by changing the arrangement of the fields and how the fields appear. Select **Tools -> Customize -> Design View...** to change the active view or form.



Shortcut

An item can be quickly added to a calendar view by highlighting a time slot in Day mode, and then typing in the name of the item. A Detail Form will open, with the *Name*, *Date*, and *Time* data already filled in.



Practice

Open the Calendar view in day mode. Click on any time slot then type a description of the event. When complete, click the **Save** button on the form's tool bar. The item is added and is now visible in the view.

## Using Connections


A *Connection* links two related items. These items can be in the same category, or in different categories.

A *Connection Control* is a special type of field which represents a connection to other items. It is used to link one item to another item in a different (or same) category. For example, a note could be connected to a person.



Figure 3-13: Sample connection control.

Connection controls can be used when adding or editing an item. Perform the following procedure to use a connection control to connect/disconnect an item:

- 1 Select the  button on the Connection Control. A box appears listing all the items in the connected category. Connected items are checked and unconnected items are unchecked. See the following figure.

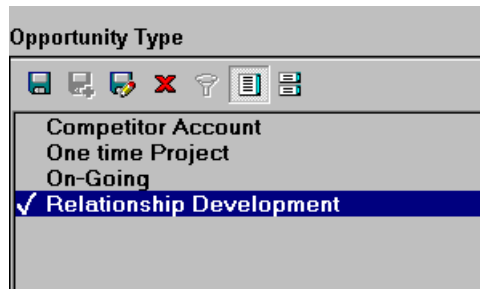




Figure 3-14: Connection drop-down box

- 2 To connect (or disconnect) an item, double-click on the corresponding line item in the box displayed above. The process of double-clicking toggles the Connection Status (i.e. if an item was connected, double-clicking removes the connection; if an item was unconnected, double-clicking establishes the connection.)



Shortcut

When the desired item is highlighted, pressing the Space Bar also toggles the connection status for the item.

- 3 When all connections have been made select the  button on the connection tool bar to save changes, or  to cancel the changes.

The other buttons on the connection tool bar are used to:



turn on or off the filter on the list



display the connected and unconnected items in one list



split the connection list; display the connected items on top and unconnected items on the bottom



save and edit an item in the connecting category

## Editing Items


It is possible, and even probable, that information will change after data has been entered into a Commence database. For example, a contact may have a new address or an appointment has been rescheduled. Perform one of the following steps to edit an item that has been saved:

- From an active view, highlight the item to be edited, and press the **ENTER** key.

**OR**

- Double click on the item to be edited.

Data within the fields may now be modified as necessary.

When all changes have been completed, select the  button from the detail form's tool bar.

### Shortcut

The date and time of an item in a calendar view can be changed by dragging the item to the new date or time within the calendar view.


## Viewing Information Stored in an Item

Perform one of the following steps to view the information stored within a single item:

- From the active view, highlight the item to be edited, and press the **ENTER** key.

**OR**

- Double click on the item to be edited.

When finished viewing the data, select the  button from the detail form's tool bar to close the form without saving any changes.


## Deleting Items

As a Commence database evolves, some data will eventually become obsolete and should be archived, or possibly deleted. Perform one of the following steps to delete an item from a category:

- From within the active view displaying the item to be deleted, highlight the item, and press the **DELETE** key.


**OR**


- From within the active view displaying the item to be deleted,

highlight the item and select the  button on the tool bar.

Not only will the item be deleted from the category, but all connected items will be unlinked as well. Only the connections will be deleted, not the item(s) to which the deleted item was connected.

**CAUTION:** Once an item is deleted, it is permanently removed from the database. The data CANNOT be recovered. Delete an item only when absolutely sure it is no longer needed.

 Practice

Highlight an item recently added to a category, and select the  button. The highlighted item will be removed from the category.

# Where to go next

Congratulations! Now that you have successfully installed the Commence Application Suite and reviewed some of the basic functions, you are ready to begin using the product for your business.

Additional guides are available for your reference and are listed in the following table.

**Table 3-15: Commence Guides**

Title	Filename	Description
Implementation and Planning Guide	impguide.pdf	Preparing the CRM applications for your company
Server Guide	svrguide.pdf	Configuring your workgroup
Application Guide	appguide.pdf	Step-by-step user guide for the CRM applications
User's Guide	usrguide.pdf	Commence feature reference