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Simplifying marketing, sales, and support

Quick-Start Guide

Fully illustrated

With examples

Step-by-step instructions

version 2.0

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INSIDER® 2009 Quick-Start Guide

with Examples

IRM Ltd.

INSIDER® 2009 Quick-Start Guide
with Examples

Created by **Petko Mikhailov**
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Introduction

With this book you get the "must have" knowledge that you need to make an informed decision when assessing your INSIDER® trial as the CRM and office management solution for your business. The book, however, doesn't stop there – it gradually introduces you to the key practical tasks you will need to perform once you have switched to the full version of INSIDER® so that you could enjoy smooth transition from the trial setting to your actual work environment.

How to Use This Guide

This guide is designed to familiarize you with your INSIDER® system and to help you get up to speed quickly with using INSIDER® in your real-life business. To make the most of this guide, read the topics in the order they are presented in the book and, at the same time, perform on your computer the procedures with the trial version of INSIDER®. Though the guide is designed to be read sequentially, you can also jump to a particular topic if your work requires you to do a particular task without delay. Just be sure to get back later to where you have been and cover what you have skipped.

Of course, not all of the INSIDER® capabilities can be possibly discussed in a quick-start guide like this. The purpose of this booklet is to give you a head-start, but that's it. Therefore, most of the features listed in the **Introduction to INSIDER® 2009** topic (and this list of capabilities is far from complete!) are given there for information purposes only and instructions are provided only for a few of them. For further information on how to perform certain tasks in INSIDER®, refer to the INSIDER® online help system.

How This Book Is Organized

In **Part I, Getting Started**, we introduce INSIDER® and its capabilities, provide notes on how to set up and start the program, and examine its user interface and the way it operates.

In **Part II, Getting Up and Running**, we tell you how to perform some basic everyday operations with INSIDER® like adding contacts, creating assignments, issuing invoices and so on.

Part III, Getting Down to Business, is where we help you set up and customize your INSIDER® for actual business use and rid of the sample data that comes with the trial version. We also cover one advanced task here – how to use INSIDER® to create personalized mailings to your prospects and clients.

Terminology and Formatting Conventions

Terminology note:

Throughout this guide, the words "computer" and "machine" are used interchangeably, as well the words "INSIDER®" and "the program."

Formatting notes:

- For the screen elements which have their name written on them, like "the **View** menu," are indicated in this book by **bold** typeface.
- The screen elements that are named in this book but do not have their name written on them, are indicated by mere title capitalization and regular typeface, e.g. the Results panel. (That is, the pane has no name in the program, but we call it "Results pane" for the sake of clarity.)
- User input is indicated by *italicized* typeface, e.g. "type in the product/service name, in our case, *Behind the Neck*." (Meaning you must type *Behind the Neck* in the field in question.)

Sidebars Used in This Book

Within the step-by-step instructions, some additional information is provided in the form of Warnings, Notes, and Tips. Here is what they look like and what they are about:

WARNING:

A **warning** indicates an important piece of information which you need to now in order to avoid some critical mistakes that may prevent your INSIDER® system from functioning properly.

Note:

A **note** indicates a piece of information that helps you avoid non-critical mistakes in you work with INSIDER®.

Tip:

A **tip** is a piece of useful information that helps you work with INSIDER® faster and more easily.

Part I
Getting Started

In This Part:

- Introduction to INSIDER® - capabilities and features
- How to install INSIDER®
- A quick tour of INSIDER®
- How to work with records

Introduction to INSIDER® 2009

INSIDER® is the leading integrated customer relationship management (CRM) and office management suite. It is one system for all departments and operations of your firm – management and administration, marketing, sales, finances. It integrates the data from those activities and departments making it easy to access, secure to store, and available for various kinds of analysis and reports.

INSIDER® offers powerful customer and contact management to help you save time, improve sales and marketing, and deliver better customer service: organize and manage all your contact, prospect, and customer information in one place; track leads and opportunities throughout the sales cycle; easily create, personalize, and track direct marketing campaigns in-house; and centralize your project-related information so you can stay organized and monitor tasks with automated reminders. In addition to that, INSIDER® enables you to maintain a product database and to create offers from templates that draw information directly for that database. You can also issue invoices and generate various types of reports, both pre-defined and custom.

INSIDER® helps you create, personalize, and track direct marketing campaigns in-house for more effective marketing: a detailed form lets you enter all the details needed for producing an effective campaigns filtering customer and prospect data enables you to produce targeted

mailing lists; INSIDER®'s mail merge capabilities allow you to personalize sales letters and marketing publications created in Microsoft Office Word; and, last but not least, you can track the response to your campaigns to determine their effectiveness.

INSIDER® helps you manage prospects, leads, and clients from first contact through deal closing to customer retention so that you can communicate and sell more effectively. Tracking prospects and leads in INSIDER® is all-encompassing and efficient, it covers things like contact information, communications history, documents, sources, and probability of closing. With INSIDER®, you can view your opportunities by sales stage and probability of closing and track them from the initial contact to closing the sale.

INSIDER® allows you to handle with ease both the external and internal aspects of the activities of your organization. External aspects are the aspects of an activity that are targeted towards the market – customer and prospect management (including full client details and history), marketing campaigns, offers, sales, etc.. Internal aspects are the organizational aspects of the activities and they concern your staff, their tasks, assignments, memos, etc. and the coordination of these activities among the members of the various teams and task forces.

All these capabilities come on a flexible, largely customizable structural base, so you can adapt your copy of INSIDER® to suit your unique business needs: you can define your own custom categories and sub-categories of information, like assignment sub-tasks, company departments (for both your own firm and the clients' companies), currencies, contact categories, and much more; you can even custom-label and use for your own purposes some of the fields in the contacts' profiles.

With INSIDER® you can:

- maintain a complete contact database including a detailed client profile and client history of offers and purchases
- manage all types of activities like meetings, phone calls, emails, custom tasks, etc., and relate them to individual client and leads profiles

- co-ordinate the tasks and activities of staff members through a visual calendar and by assigning responsibilities and issuing notifications; the assigned tasks appear automatically upon creation in the calendars of the concerned staff members
- retrieve the needed information quickly and easily for practically all kinds of data (e.g. clients, sales, etc.) through the INSIDER®'s built-in sort and search capabilities
- work with optimal productivity: INSIDER® has a logical interface that allows you to switch screens quickly; you can get back to the current contact profile with one click only; you can automatically enter repeated or most frequent pieces of data in the records, and so on
- maintain a comprehensive and neatly organized catalog of your products and services
- fully manage your marketing campaigns, both organizationally and financially, including target groups definition and management, budgeting, assigning activities and responsibilities, attaching documents, etc.
- create automatically personalized mailings using MS Word
- generate group activities, related to a target group or campaign
- analyze your marketing campaigns
- have ready-to-use offers for any occasion by just selecting the appropriate introductory and ending texts from a list of existing templates
- generate offers and invoices straight from the client's profile and an invoice directly from the related offer
- track payments and generate collection notices for overdue payments
- track and analyze sales

- assign additional information in the form of files to certain types of data, like contacts, tasks, campaigns, which is an effective way to manage documents that are scattered around the network and making them available where they logically belong to; take your online collaboration with your colleagues to the next level by accessing documents from within INSIDER®
- conveniently export information to MS Excel and MS Word and import your existing data
- maintain your own custom types of contact information
- perform quick analysis on any type of data in your system with ready-to-use analytics that take advantage of INSIDER®'s built-in business intelligence system (based on the advanced OLAP technology) and present the results visually in graphical charts
- generate reports on various subjects (e.g. contacts, offers, tasks) with pre-defined templates or extend the reporting capabilities of INSIDER® even further with custom templates to fully meet your business's unique needs
- and most of this is as easy as selecting an option from a right-click menu or performing a drag-and-drop with the mouse!

Hardware and Software Requirements for INSIDER®

Before installing INSIDER®, make sure your computer meets at least the minimum hardware and software requirements for running the program. The following table presents not only these requirements but also the recommended values:

Table 1 – Hardware requirements for installing INSIDER®

Component	Minimum	Recommended
Processor Type	Pentium III or comparable	higher than Pentium III or comparable
Processor Speed	500 MHz	1 GHz and higher
Memory Capacity	500 Mb	1 Gb and more
Video	32-bit color, 1240x760	32-bit color, 1280x1024
Hard Disk Space (depends on the installed software components):		
.NET Framework 2.0	280 Mb	1 Gb
SQL Server Express	600 Mb	600 Mb
INSIDER® Client	60 Mb	60 Mb
INSIDER® Server	6 Mb	6 Mb
INSIDER® Service	6 Mb	6 Mb

As you can easily figure it out from the table, it would be a safe bet to install INSIDER® on a drive that has around 3 Gb of free space.

The current version of INSIDER® is supported by the following operating systems (where service packs (SPs) are indicated, the higher versions of the SPs are supported as well):

- Windows Vista
- Windows Server 2003 SP1
- Windows Server 2003 Enterprise Edition SP1
- Windows Server 2003 Datacenter Edition SP1
- Windows Small Business Server 2003 Standard Edition SP1
- Windows Small Business Server 2003 Premium Edition SP1
- Windows XP Professional SP2

- Windows XP Home Edition SP2
- Windows XP Tablet Edition SP2
- Windows XP Media Edition SP2
- Windows 2000 Professional Edition SP4
- Windows 2000 Server Edition SP4
- Windows 2000 Advanced Edition SP4
- Windows 2000 Datacenter Server Edition SP4

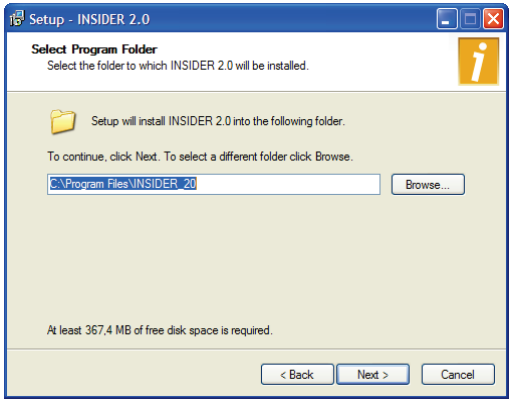
Installing INSIDER® – Please Read BEFORE Starting Setup

The INSIDER®'s setup process is quite straight-forward but requires some familiarity with networks and MS SQL Server. Yet, if you don't have that kind of knowledge, the information provided in this topic should be sufficient to enable you to do the setup on your own.

Once you start the setup from the demo CD or from the downloaded setup file, the setup wizard will guide you through the steps of the procedure. At some of the steps you will be given the option to change the default settings and custom-configure your INSIDER® installation.

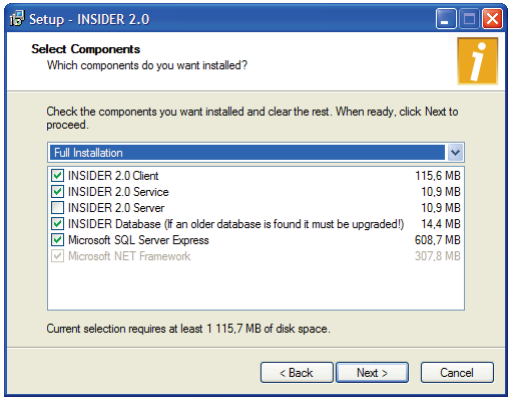
The default settings work fine for evaluation purposes and in some typical cases (for setup on a stand-alone computer or on a server machine), but depending on your real-life business needs, you might need to change these default settings to what is actually required in your particular situation. For this reason, if you are installing INSIDER® for real use and not for evaluation purposes, be sure to read this topic PRIOR to attempting the actual installation – it will help you avoid installation mistakes and, possibly, the need to reinstall the program.

After choosing English as the language of the installation and after accepting the license agreement, the first point at which the installation wizards will ask you to make a decision is when the program folder is about to be set up:



The default setting is the *INSIDER_2009* folder in your Windows' Program Files folder, e.g. *C:\Windows\Program Files\INSIDER_2009* if your Windows folder is C:\Windows. If this is the first time you are installing INSIDER®, the *INSIDER_2009* folder does not exist and will be created during the setup process. You are free to change the program path to anything that suits your needs (e.g. a different drive, for example) by typing the desired path directly in the path field or by navigating to a desired location using the **Browse…** button. If you don't have any particular reason to change the program folder, it is recommended to use default one.

Next comes the **Select Components** step:



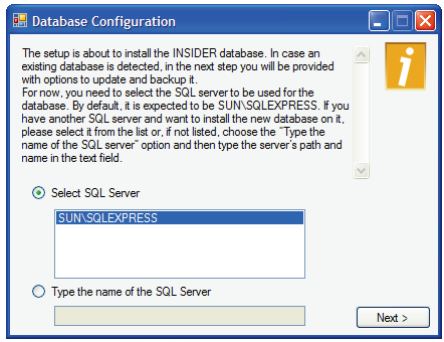
It enables you to choose which INSIDER® components you want to install. Several pre-configured choices are given in the drop-down list. For the purposes of this quick-start guide, let's select **Full Installation**. (For a more detailed explanation of these setup options, as well as in case you are installing INSIDER® on a network, refer to "Customizing Your INSIDER® Installation" and "Using INSIDER® on a Network" (pages 51 and 54, respectively).)

WARNING:

1. If you already have another edition of MS SQL Server 2005 (Workgroup, Standard, or Enterprise) installed on your computer, be sure to deselect the **Microsoft SQL Server Express** option. This is necessary because the SQL Server Express setup does not check for previous SQL Server installations and installing it over an existing SQL Server may cause problems.
2. If setup finds an existing INSIDER® database, you will be provided with options to backup it and, if the database comes from an earlier version of INSIDER®, upgrade it. Backing up your database is a good precaution against incidental data loss.

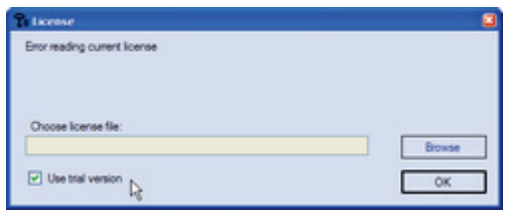
Depending on the configuration options chosen, some additional setup programs (like MS Visual Studio 2005 Runtime setup) may run within the INSIDER® installation procedure and you will be required to accept the terms of their license agreements, too.

In one of the next steps, "Configuring Application Server", the setup program will ask you to select an SQL Server from the list of the already installed SQL servers. If there hasn't been any SQL servers installed, the server installed by the INSIDER® setup will be the only one listed and the window for this step will look like this (In your actual installation, instead of SUN you will see, of course, the name of your actual computer.):



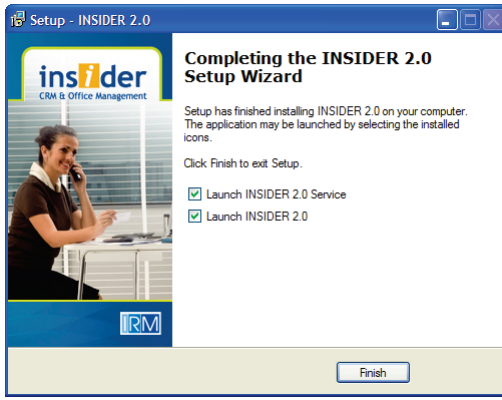
Note that if the desired SQL Server has not been found, it can be entered manually in the lower field. Select or type in the server name and click the **Next** button to proceed. Once this step is complete, the same window will pop-up again but this time it will have **Finish** button and not **Next**. Click it to proceed to the next step.

After the SQL Server setup, you will be prompted for the license for INSIDER®:



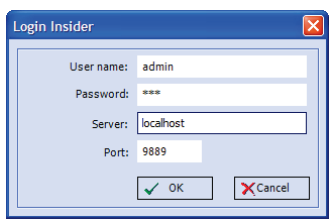
To proceed, check the **Use trial version** box and click **OK**.

Once the INSIDER® setup is complete, depending on the installed options, you may be asked to restart your computer, otherwise, on the last screen of the wizard, you will be provided two options which, if checked, will start INSIDER® immediately after the wizard closes:



Starting INSIDER® and Logging on for the First Time

If you have made a standard INSIDER® installation, the INSIDER® icon ( ) should be available on both your desktop and the Quick Launch bar of the Taskbar. You can launch INSIDER® either from there or from the Windows' Start menu. INSIDER® does not allow for unauthorized use, so whenever it starts, it first displays its login window requesting a user name and a password:



The default user with which the evaluation version comes is **admin**. (This user has unrestricted access rights and permissions to the program so you can log in and set up your INSIDER® for actual use. Later you will create additional users with restricted rights for your employees to log in and work with the program).

The password for the default user is 123. (You will change it later to something more secure. Refer to "Changing the Administrator Password" on page 59.) Type it into the Password field. The default values in the Server and Port fields are OK for the currently installed configuration (Full Installation). Click OK. After a few seconds the INSIDER® window opens up. You are now logged in to the system as user admin.

Note:

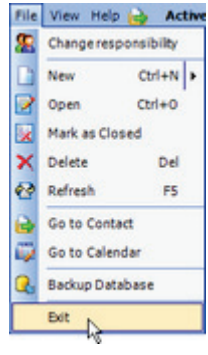
Every employee in the firm using INSIDER® should have an INSIDER® user account created for him/her (see "Creating New Users" on page 62) and should be able to access INSIDER® only with him/her own user name and password. This is necessary not just for security reasons but also to ensure the proper functioning of the INSIDER® system (e.g. each employee needs to see their own assignments and so on).

Quitting INSIDER®

Like most Windows applications, there are three ways to quit INSIDER®:

- You can click the button in the upper right of the INSIDER® window:

- You can select the **Exit** option from the **File** menu:



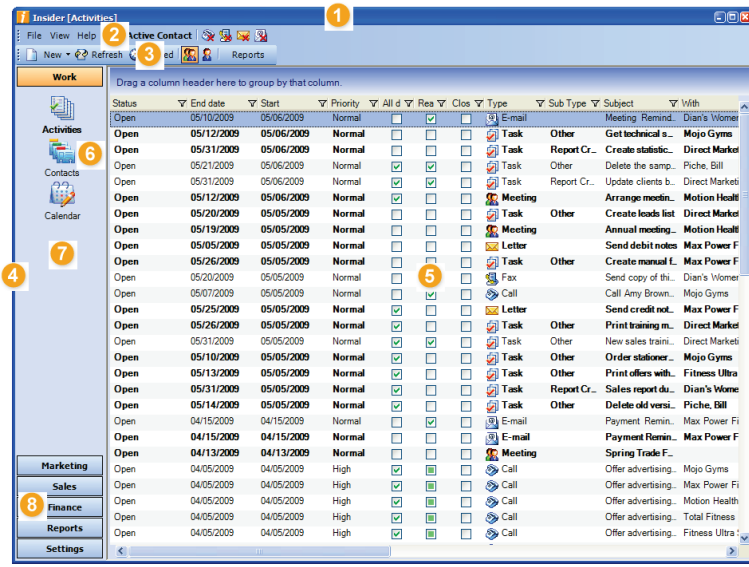
- You can use the Alt+F4 keyboard shortcut.

Making Your Way Around

INSIDER®'s interface is straightforward and easy to use. It will seem familiar to you if you have some experience with Microsoft Office Outlook. Similar to Outlook, INSIDER® has a Navigation Pane on the left and, depending on what you select in it, the respective content is displayed in the right-hand side area (which is called "Information Display Pane").

Graphic Representation of INSIDER® User Interface

Before proceeding any further, now is a good time to have a look at the INSIDER® window and its main parts. Take a minute or two to examine the illustration bellow and the reference table that follows in order to learn about the basic elements of the INSIDER® window, their function, and the terminology we use to refer them.



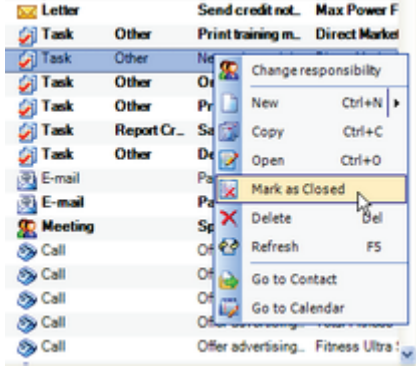
1. Title Bar: Displays the name of the software and, in square brackets, the name of the currently selected screen.
2. Menus: The commands needed for your work are located in menus, such as **File** and **View**. Click the menu to display the command group.
3. Toolbar: Frequently used commands are located here.
4. Navigation Pane: Enables you to switch between the panels (**Work**, **Marketing**, **Sales**, **Finance**, **Reports**, and **Settings**) and select the screen you want to work in (e.g. in the **Work** screen group – **Activities**, **Contacts**, or **Calendar**.)
5. Information Display Pane: Displays the content of the currently selected screen.
6. Navigation Pane Buttons: Switch the view to display the related INSIDER® screen.
7. Navigation Pane Panels: The panels in the Navigation pane group several screen buttons together. This grouping is logically based on the type of activities performed in the related screens. (For example, the **Marketing** panel contains the buttons for the **Campaigns** and **Contact Groups** screens.)
8. Navigation Pane Panels Header**:** Clicking the header of a closed panel opens that panel to allow access to the screen buttons in it.

Tip:

Take Advantage of Right-Click Menus

Many tasks in INSIDER® can be performed from more than one screen and in more than one way. Generally, there are three ways to perform a task: from the menus, from the toolbar, and through a right-click menu. (All the three ways do not apply to all tasks but they do apply to most of them.)

Right-click menus open when you click with the right mouse button on an object or on a blank space in the Information Display Pane, for instance when you click on an assignment record in the **Activities** screen. Right-click menus list the commands that make sense at the moment. In other words, right-click menus are sensitive to where you are and what you are presently doing, i.e. they are context-sensitive.



Because the right-click menus are easy to access and always offer valid choices, they are typically more convenient to use than the commands located in the standard menus above the program toolbar. So, here is a piece of practical advice: whenever you try to do something in INSIDER® for the first time, be sure to first check what commands are available in the right-click menu. Chances are that you will find the easiest way to perform a task right away!

Navigating INSIDER®

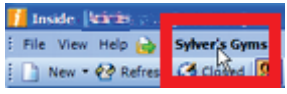
The Navigation Pane on the left-hand side of the INSIDER® window is always visible. You use it to navigate through INSIDER®'s screens. The Navigation Pane contains the screen-related buttons. Each screen-related button corresponds to a particular INSIDER® screen, e.g. **Activities**, **Contacts**, etc.. Clicking a screen button switches the INSIDER® view to display the related screen. The screen

buttons are arranged in groups, placed in individual panels (**Work**, **Marketing**, **Sales**, etc.) and only one panel can be opened at a time. To open a panel and access the buttons in it, click the panel header.

Tip:

Return to the Last Selected Contact Quickly

If you have opened a contact profile in the **Account** screen and after that navigated to some other screen(s), you need not to go all the way through the Navigation Pane again to return to that profile. Just click the Active Contact button (whose label will be now displaying that contact's name) on the menu and the contact's profile will be displayed again:



Take a Tour of INSIDER®

Now that you know how to navigate INSIDER®, let's take a tour through its screens and find out what each screen is about and how it functions. (Click the corresponding button in the Navigation Pane to switch INSIDER® to the respective screen.) Refer to the table that follows for an overview of each screen.

Panel	Button	Screen	Explanation
Work	Activities	Activities	Enables you to view, create and manage activities. Activities are assignments of "to do" type that are assigned to and/or send employees. They can be related to a particular client ("contact"), can have a start date and end date, and can be displayed in the Calendar. There are six types of activities: **Call**, **E-mail**, **Fax**, **Letter**, **Meeting**, **Task**. Depending on the selected view, ether only **Open** activities are displayed (those that still need to be done) or both **Open** and **Closed** (completed or canceled) activities.
	Contacts	Account	This screen is like an address book but with some advanced capabilities. It enables you to create and manage the profiles of your

Panel	Button	Screen	Explanation
			firm's contacts. A "contact" is usually an organization your firm is dealing with, like a client, prospective client (lead), partner, affiliate, but can also be a person – for example, a private client or an employee with your own firm. The individuals from the "contact" organization with whom you communicate are called "Contact Persons."
	Calendar	Calendar	Displays a graphic calendar with the scheduled activities. There you can see your own activities (activities that are either created by you or assigned to you) and, depending on your INSIDER® user rights (typically if you are a manager), the tasks of the other employees. You can access activities and create new activities directly from the Calendar (that is, you need not to open the Activities screen to do this).
Marketing	Campaigns	Campaigns	Enables you to create and manage your marketing campaigns.
	Target Groups	Contact Groups	Enables you to create and manage multiple target groups and sub-groups for your marketing activities and campaigns.
Sales	Offers	Offers	Enables you to create and manage the offers made to clients and prospects.
	Articles	Articles/Items Catalogue	In this screen, you maintain and manage your firm's products and services.
Finance	Invoices	Invoices	Enables you to create and manage the invoices issued to clients.
Reports	OLAP	OLAP	OLAP stands for **On**Line **A**nalytical **P**rocessing – an advanced analytical and reporting technology with elements of artificial intelligence. This screen enables you to perform trend analysis on sales,

Panel	Button	Screen	Explanation
			financial, and other information. It provides ready-to-use analytics and presents the results visually in graphical charts.
Settings	Users	User Rights	Enables you to set up INSIDER® users and manage their user roles (User or Manager) and access rights.
	System Data	Nomen-clatures	Enables you to manage various system data categories and define their entries so you can adjust the way INSIDER® operates to your business model. Such system data categories are **Activity Subtypes**, **Attachment Types**, **Contact Categories**, **Departments**, etc.
	Data Import	Data Import from Excel Sheets	Enables you to import to INSIDER® data from your previous system or from other sources. The imported data must be in MS Excel 2003 spreadsheet format (.xls file).
	Report Configuration	Report Configuration	Enables you to upload pre-defined reports for use with INSIDER®. The uploaded reports must be in Crystal Reports for Visual Studio 2005 format (.xcr file).

Tip:

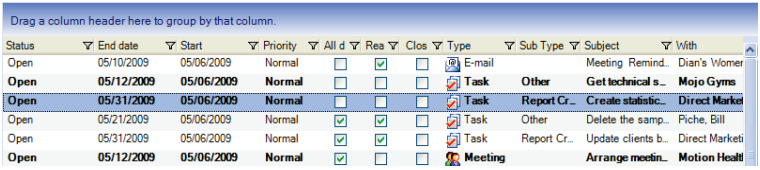
INSIDER® Can Manage Additional Information

INSIDER® not only can manage your assignments, contacts, and campaigns, but also enables you to add and manage some additional information related to the individual assignments, contacts, and campaigns by attaching files to them. This way you can keep all the information relevant to a particular assignment, contact, or campaign bound to that assignment/contact/campaign and readily available within a mouse click for you and for your colleagues to use.

Sorting and Grouping Records

As you have already noticed by now, quite often the information you are going to work with is presented in INSIDER® in table-like form

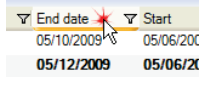
in which the individual columns represent the various categories of information and the rows are the individual records. For example, in the **Activities** screen, each row represents an individual assignment:



Under real-life conditions, your database can grow quickly to hundreds and thousands of records, so it is of paramount importance to be able to sort and group these records appropriately so you can have a meaningful and manageable view of the records.

Sorting Records

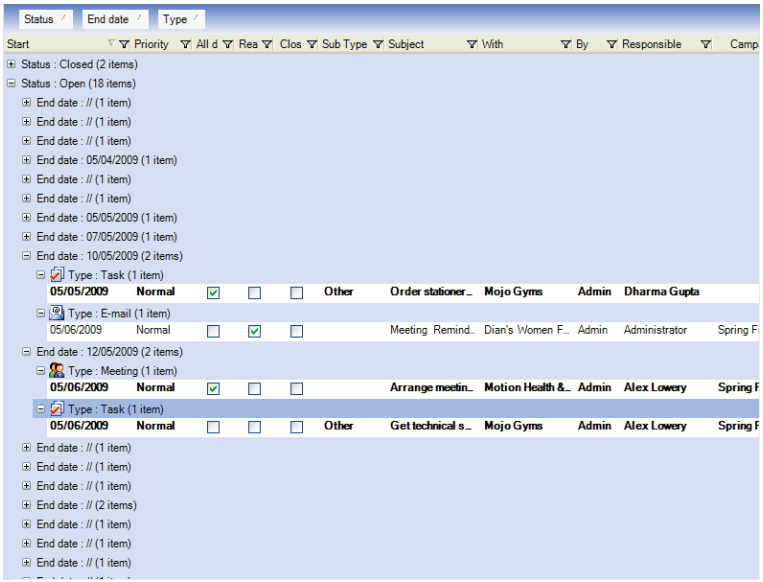
To sort the table by a particular category (column) in ascending order, click the column header:



Clicking the column header for the second time, sorts the table by that column in descending order.

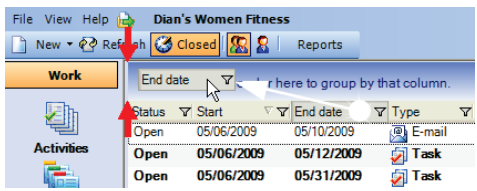
Grouping Records

INSIDER® has the fascinating ability to group the records that have the same content in the sort column and to present that grouping in a convenient tree-view form. Following is the **Activities** screen, but the records are now grouped:

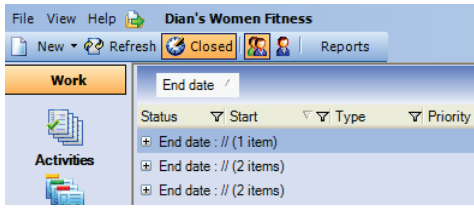


To group the records presented in table-like form into a tree-view:

1. Decide by the content of which column you want the records grouped.
2. Drag with the mouse the header of that column to the blank area just above the header row. A successful drag is indicated by two red vertical arrows encompassing the blank area:

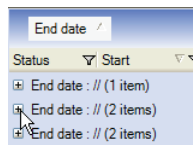


3. Release the mouse button. The view of the panel changes from table-like form to a tree-view:

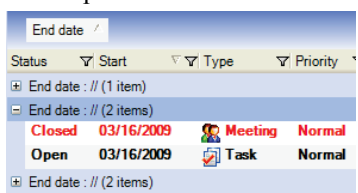


Each node of the tree represents the records that have identical value in the grouping category (column). (Each value existing in the column is now represented by an individual node.) The nodes are sorted by those values in ascending order. You can reverse the sort order by clicking the grouping column header (now located in the blank area).

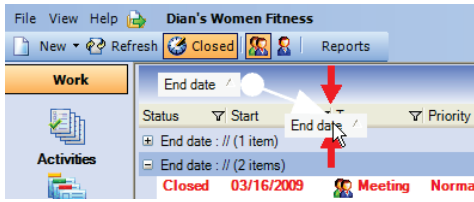
4. To view the records grouped under a node, click the plus sign to the left of the node:



This will expand the node and display its records in table-like form (There will be a separate table for each node now):



5. To restore the original table-like view of the panel, drag the header of the grouping column back to the header row. A successful drag is indicated by two red vertical arrows encompassing the header row:



Tip:

You can group records by more than one column. To do this, just drag a second, third, etc. column header in the blank area. The order in which the grouping headers (the column headers in the blank area) are arranged determine the grouping order. (The records are grouped first by the content of the leftmost grouping header, then – by the one next to it to the right and so on.) You change the arrangement of the grouping headers by dragging them until you achieve the desired grouping order.

Part II
Getting Up and Running

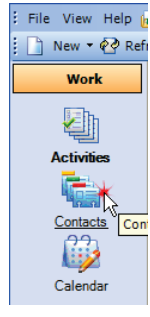
In This Part:

- Working with Contacts
- Creating Assignments and using the Calendar
- Adding Products and Services
- Creating Offers for Clients
- Issuing Invoices

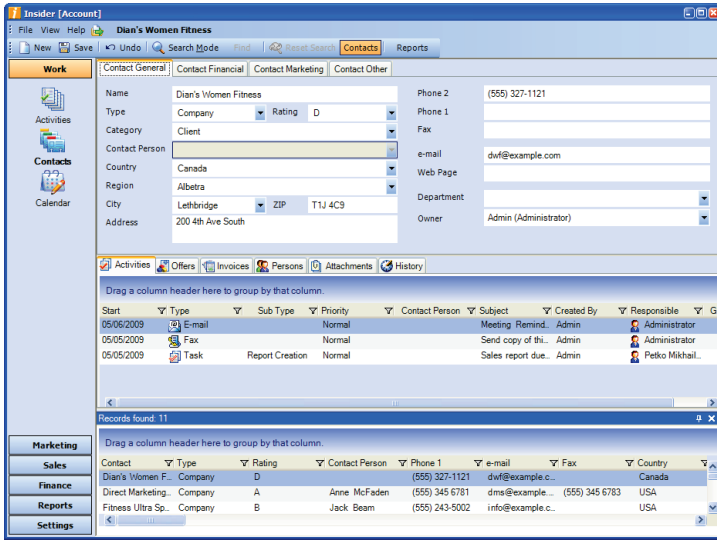
Working with Contacts

Adding a New Contact

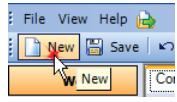
1. Access the **Account** screen. To do this, either click the Active Contact button (see the tip in the Navigating INSIDER® topic) or, in the Navigation Pane, click the **Work** panel header if closed and then the **Contacts** button:



This will display the **Account** screen with the last opened profile automatically shown onscreen. Your INSIDER® window should now look something like this:



2. Either press Ctrl + N or click the **New** button on the toolbar:



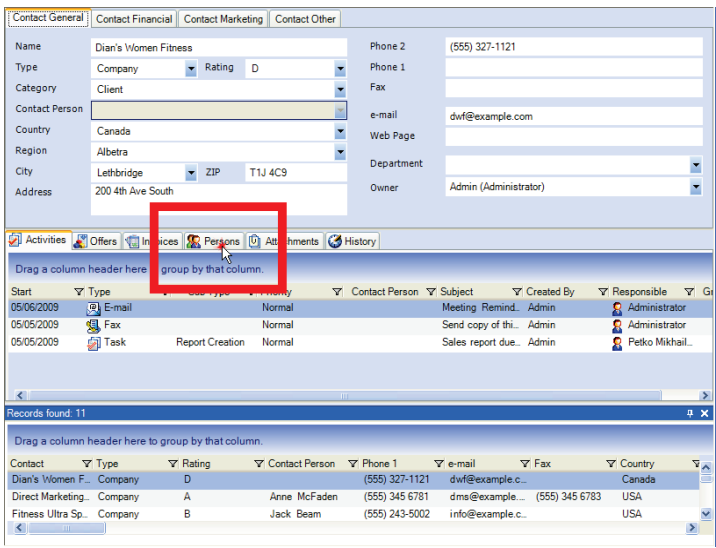
This will get the **Account** screen cleared and the cursor blinking in the **Name** field indicating that INSIDER® is ready for your input.

3. In the **Name** field, type the name of the contact's organization, e.g. if it is a company, type the company name.
4. Press the Tab key to move to the next field.
5. In the same way, fill in all fields of the **Contact General** tab for which the respective information is available. Use the Tab and the Shift + Tab keys to navigate forwards and backwards through the fields or simply click with the mouse on the desired field.

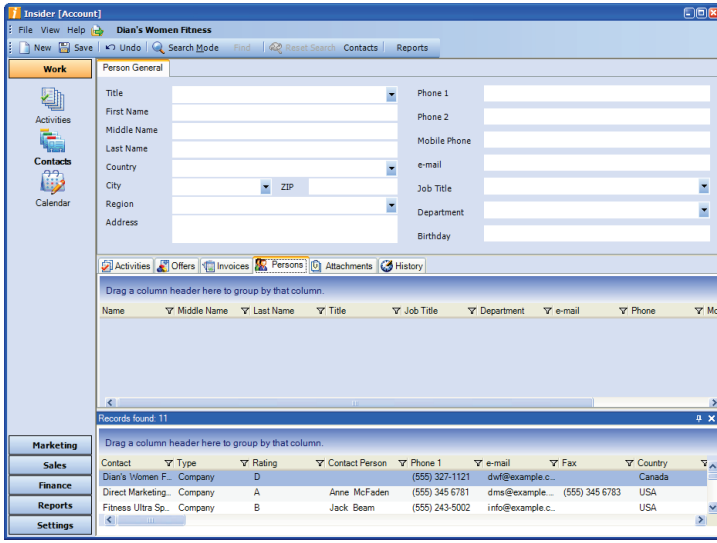
Note:

1. The **Contact Person** field will appear disabled. This is because you cannot enter the contact person name from this tab. Don't worry about it, you will enter the contact person a few steps later.
2. Some of the fields have drop-down lists and the entries can be selected from there if available; if not, just type the appropriate entry into the field. In the latter case, upon storing the new data (most likely in step 8), the program will ask you whether to add this new entry to the drop-down list so it would be available for selection from this point on. Confirm if you want the entry to be added to the list.

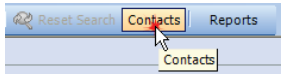
6. If the contact's financial information is available, click the **Contact Financial** tab and enter the respective data there.
7. Click the **Contact Marketing** and **Contact Other** tabs to see if the information to be stored there is available at the moment and if so, enter it, too.
8. To add the contact person, in the middle panel of the screen, click the **Persons** tab:



This will display the **Persons** tab in the upper panel of the screen. Your screen should now look like this:



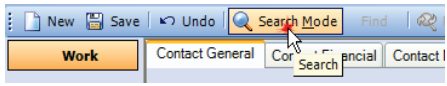
9. From the drop-down list of the **Title** field, select the contact person's title (Mr., Ms., etc.).
10. Press the Tab key to move to the **First Name** field.
11. In the **First Name** field, type the name of the contact person's first name.
12. In the same way, fill in all fields of the **Contact General** tab for which the information is available.
13. When finished entering data for that contact, either press Ctrl + S or click the **Save** button on the toolbar**.**
14. *(Optional)* To switch the upper panel back to the **Contacts General** tab, click the **Contacts** button on the toolbar:



Finding Contacts

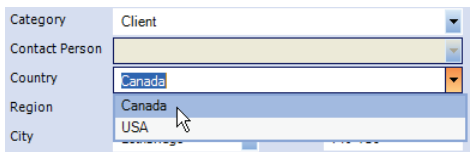
In the **Account** screen (Navigation pane > **Work** panel > **Contacts**), you can perform searches to find a particular contact or a group of contacts that match your search criteria. You first switch the screen to Search mode, then enter your search criteria and perform the search. The search results are listed in the bottom (Results) panel of the screen. Here is a step-by-step description of the procedure:

1. In the **Account** screen, click the **Search Mode** button on the toolbar:

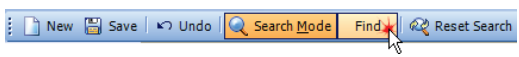


   This will switch the screen to Search mode. You can tell the screen is now in Search mode because the color of the top panel has changed from blue to red. The top panel now serves as a filter form in which you are going to enter your search criteria (keywords).

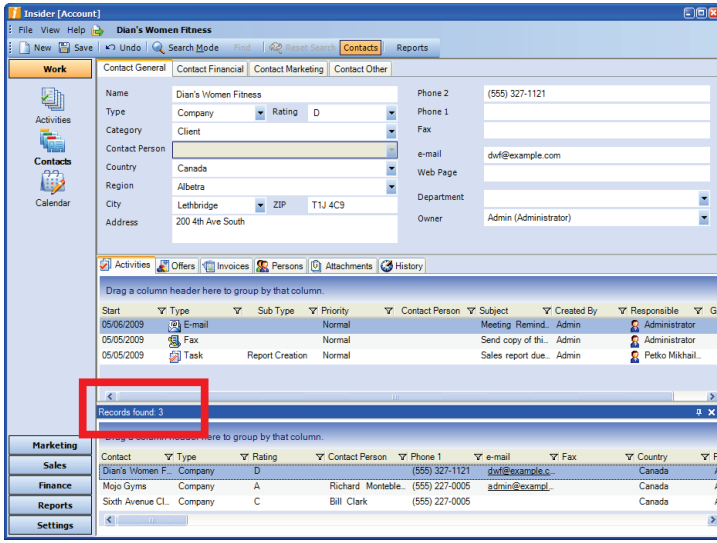
2. Enter your search criteria in the fields (Type them in or select them from drop-down lists where drop-down lists are available.). You can fill in as many fields as relevant to your search (Switch the tabs if necessary to use the fields in the other tabs.). For example, if you want to find all your clients located in Canada, select *Client* from the **Category** drop-down list and *Canada* from the **Country** drop-down list:



3. Click the **Find** button on the toolbar:



   All matches found (your Canadian clients, in this example) will be listed in the results panel and their number indicated in the panel header:



Tip:

If there are search criteria (keywords) you frequently use in certain fields, you can lock those fields so that they automatically display the criteria when you switch the screen to Search mode. To do this, when the particular keyword is displayed in the field (can be either typed in Search mode or just displayed in View mode, it doesn't matter), click the field label (the name of the field located on its left). This will lock the content of the field as the default search keyword for this field which is indicated by changing the color of the label's typeface to red. (If you want to unlock a locked field, click its label again.)

This feature can come handy if you want to find contacts that are similar to the currently displayed one. Just lock the fields that should be displaying common content and perform your search.

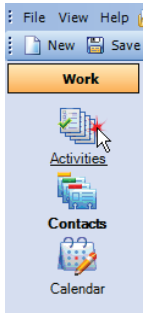
Adding a New Assignment

Adding a New Assignment from the Activities Screen

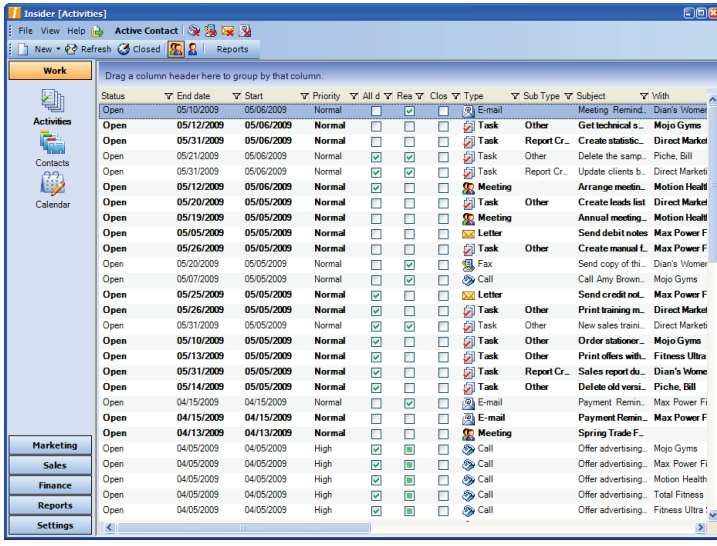
Assignments are "action items": things of "to do" kind, that is – pieces of work that need to be undertaken, like meetings, phone calls, mailings, etc.. Assignments in INSIDER® can have duration and deadlines and can be related to a particular campaign and/or client.

Each assignment can have a person in charge appointed to it and can be distributed via your INSIDER® system to the colleagues/employees whom it may concern. (They will be able to see it in the **Activities** screen, as well as in the **Calendar** in most cases, when they log in to INSIDER® with their user names and passwords.)

1. Access the **Activities** screen. To do this, in the Navigation Pane, click the **Work** panel header if closed and then the **Activities** button:

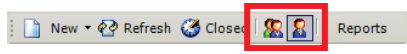


This will display the **Activities** screen with the existing activities listed in it. Your INSIDER® window should now look something like this:

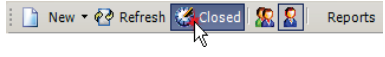


Note:

Exactly which activities will be listed depends on the selected view filter. You can filter the tasks by user, e.g. to show either only your assignments (displaying the assignments either assigned to you or created by you) or the assignments of one or more users of your choice (can be all users, too). To filter the tasks by user, use the Users and My Activities buttons on the toolbar:



You can also filter the assignments by status, meaning that you can choose to view either all assignments (both closed and open) or only the assignments that are open (still in progress) to date. To toggle assignments list open/all, select or de-select the Closed option in the View menu:



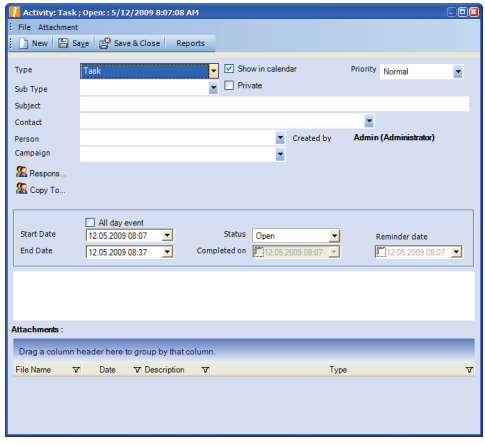
When the Closed option is selected, the assignments with Closed status are visible and listed in red typeface in the assignments list.

Tip:

A new assignment remains bold until a user opens it. This way, when the screen is set to display the assignments of the other users, you are able to tell whether they have opened (and read) a particular assignment or not.

2. Either press Ctrl + N or click the **New** button on the toolbar.

   This will bring on a form window with a form for creating a new assignment:



3. In the form, the **Type** field has a drop-down list with the available assignment types.

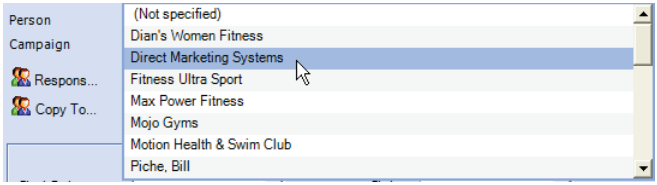
Note:

The assignment types are hard-coded in INSIDER® and cannot be changed. Currently, INSIDER® offers the following assignment types: Call, E-mail, Fax, Letter, Meeting, and Task. The Task type has sub-types which are user-configurable. It is likely that the default task sub-types would be insufficient or wouldn't serve you well in your actual business. You can change them and add new subtypes from **Settings** > **System Data** > **System Data** panel > **Activity Subtypes** option.

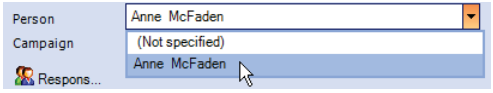
   For the purpose of this example, let's stick to the default assignment type – *Task*.

4. *(Optional)* If you don't want this assignment to be shown in the Calendar, clear the **Show in Calendar** box. Otherwise, leave it checked (default).

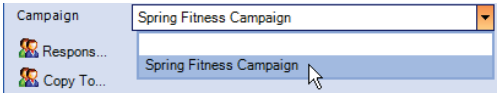
5. *(Conditional – if* Task *type has been selected)* From the **Sub-Type** drop-down list, select the desired sub-type of the task, e.g. *Research Assignment*.
6. Press the Tab key to move to the next field.
7. In the **Subject** field, type a memorable name for the assignment, like *Researching the independent gym owners in the South-East region*.
8. The **Contact** drop-down list is designed to indicate the contact whom the assignment concerns, which, especially for sales and marketing jobs, is normally a client or a prospective client. In our case, the assignment is a research job that will be performed co-operatively with our firm's marketing partner, so, from the drop-down list, select *Direct Marketing Systems*:



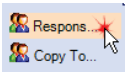
9. The **Person** drop-down list now lists the contact person(s) for the selected contact (as available in the contact's profile). Click this drop-down list open and select the desired person:



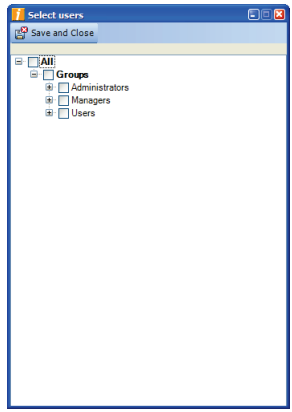
10. *(Optional)* If the assignment is related to a campaign, select it from the **Campaign** drop-down list:



11. Assign the person(s) in charge for the assignment. To do so:
    a. Point and click the **Responsible Persons** button:



This will display the **Select Users** pop-up window for selecting one or more persons that will be in charge for the assignment:



b. Click the plus signs next to the users groups to open the desired group(s) and then check the appropriate person(s) in it.

c. When finished selecting users, click the **Save and Close** button.

12. In the same manner, add the person(s) you want to receive a copy of the assignment (The assignment will be listed in their **Activities** screens when they log on to INSIDER®.). (Use the **Copy to…** button just beneath the **Responsible Persons** button.)

13. In the frame, select the appropriate start date and end date for the assignment, as well as the starting and ending times, if applicable. (Opening the **Start Date** and **End Date** drop-down lists opens a calendar; clicking on the time in the same field highlights the hours and, respectively, the minutes and enables you to type the desired value.)

14. In the big text field, click and type a description of the assignment. For example: *Estimating the potential of the independent gym owners in the North-East and the cost of the initial market penetration*.

15. *(Optional)* You can also attach to the assignment some documents that relate to it. Thus the users concerned will be able to access them without having to search for them on your firm's document server or without the need to receive them by email. (To manage attachments, either use the **Attachments** menu or right-click on the attachments area at the bottom of the window.)
16. When finished with creating the assignment, click the **Save & Close** button on the toolbar:

This will close the window and list the assignment record in the **Activities** screen. In the same manner, the assignment is now available to all users that you have selected either as responsible for it (step 11) or as its recipients (step 12). The assignment will also be shown on the **Calendar** if the **Show in Calendar** box has been checked. If the assignment is related to a contact, the assignment will be listed in that contact's profile (**Account** screen, middle panel, **Activities** tab).

Adding a New Assignment from the Calendar

You can use the very same procedure as described above to add a new assignment from the **Calendar** screen. (Just press Ctrl + N or click the **New** button.)

Adding an Assignment Related to the Current Contact

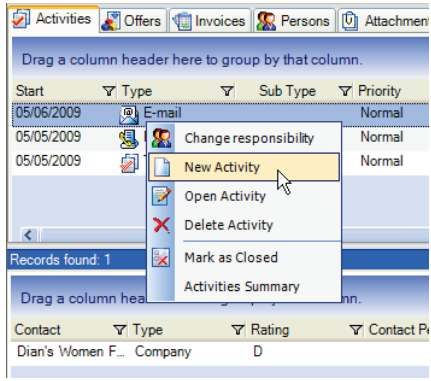
You can add an assignment related to the currently displayed contact directly from the **Account** screen (i.e. without having to go to **Activities**). To do so:

1. Make sure the desired contact is currently displayed in the **Account** screen and, in the middle panel, the **Activities** tab is selected. The existing assignments related to this contact, if any, should be listed there.

Tip:

The closed assignments will appear crossed-out.

2. Right click anywhere within the middle panel and, from the right-click menu, select **New Activity**:



This will bring on a window with a form for creating a new assignment; the contact's name will be pre-selected in the **Contact** field.

3. Proceed as described in "Adding a New Assignment from the Activities Screen", step 3 and onwards.

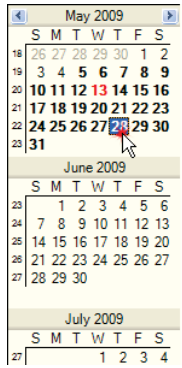
Tip:

If you are in the **Account** screen and you need to create an assignment unrelated to the current contact, you can still do so without leaving the **Account** screen: in step 2, right-click not in the middle panel, but in the bottom panel (the Results panel) and, from the right-click menu, select **Generate Activities**.

Navigating the Calendar

You can navigate your INSIDER® Calendar in a few ways (To access the Calendar, in the Navigation pane, open the **Work** panel and then click the **Calendar** button):

- Select the date you want to view by clicking it in the three-month calendar display panel in the upper-right of the screen:



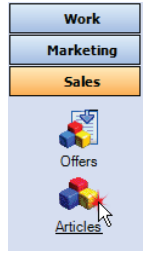
- Choose a view by clicking one of the buttons on the toolbar: **Day**, **Work Week**, **Week**, and **Month**:

- Filter the displayed tasks by user using the Users and My Activities buttons on the toolbar.
- Toggle the view to display either all assignments or open assignments only with the **Closed** button on the toolbar.

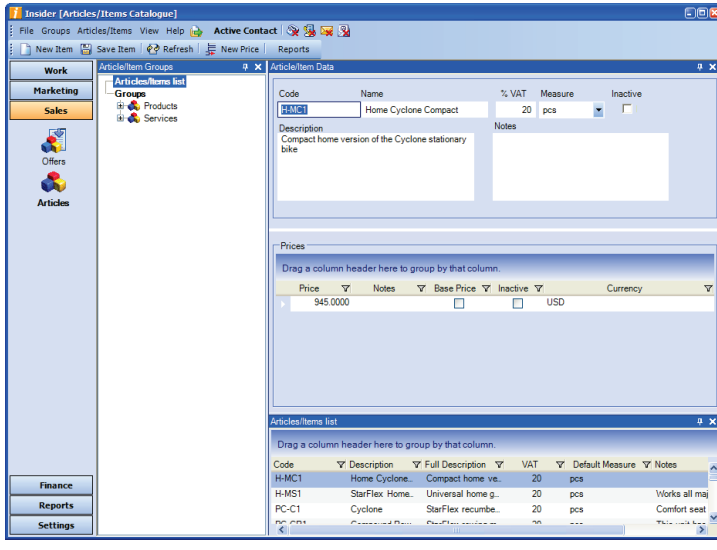
Adding a New Product or Service

Adding a new product or service in INSIDER® is a two-step process: you first add all the details about the product except for its price and save your record. After that, you add the one or more prices for the product/service (INSIDER® allows for multiple prices per product/service) and save the record again. Here is the step-by-step description of the process:

1. Access the **Articles/Items Catalogue** screen. To do this, in the Navigation Pane, click the **Sales** panel header if closed and then the **Article**s button:



This will display the **Articles/Items Catalogue** screen. In this screen, the products and services that correspond to the currently selected node in the **Articles/Items Groups** panel tree shown in the **Articles/Items List** panel at the bottom of the screen. The highlighted product in the list has its details displayed in the **Article/Item Data** panel above the list. Your INSIDER® window should now look something like this:



2. Make sure in the **Articles/Items Groups** panel the top node, **Articles/Items List**, is selected.

Note:

When the **Articles/Items List** node is selected, all products and services are listed in the **Articles/Items List** panel; when a sub-node of the **Groups** node is selected, only the products/services that have been added to this node are shown in the **Articles/Items List** panel (The **Groups** node enables you to categorize and sub-categorize your products and services into groups of your choice as shown with the sample data.).

3. Either press Ctrl + N or click the **New Item** button on the toolbar.

   This will get the **Article/Item Data** panel cleared and the cursor blinking in the **Code** field indicating that INSIDER® is ready for your input.

4. In the **Code** field, type the code for your new product, e.g. *PC-BN1*.

Tip:

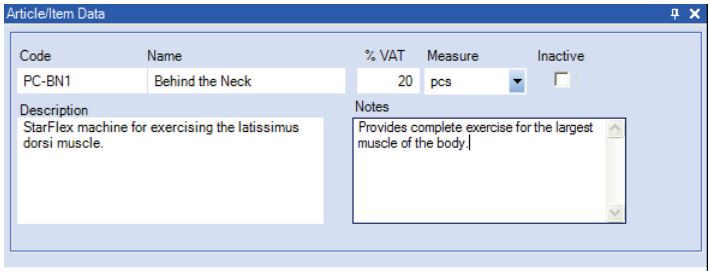
Now a good time to develop a logical coding system for your products and services if you have no such system in place yet. A good coding system will make your product-related operations easier, especially if you have a lot of products. The sample database, for example, uses "P" to indicate a product, "S" – a service, "C" – for commercial equipment, and "H" – for home equipment, followed by hyphen and an acronym derived from the product/service name and a number to indicate the product version. The "PC-BN1" code used as an example in this step stands for "product which is a commercial piece of equipment and is named 'Behind the Neck' and its product version is '1'."

5. Press the Tab key to move to the **Name** field.
6. In the **Name** field, type in the product/service name, in our case, *Behind the Neck***.**
7. Press the Tab key to move to the **%VAT** field.
8. *(Conditional)* If the default VAT value indicated in the **%VAT** field differs from the value you want to use, type the desired value in the field, e.g. *20%*.
9. Press the Tab key to move to the **Measure** field.
10. From the drop-down list of the **Measure** field, select **pcs** (pieces).

Tip:

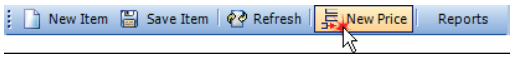
You can quickly move to the **pcs** value of the drop-down list by just typing *p* on your keyboard.

11. Press the Tab key twice to skip the **Inactive** checkbox and move to the **Description** field.
12. In the **Description** field, type a brief explanatory note about the product. In this example, as we are entering a piece of training equipment, the description could be something like this: *StarFlex machine for exercising the latissimus dorsi muscle.*
13. *(Optional)* Press the Tab key to move to the **Notes** field and type in some additional information about the product there, for example: *Provides complete exercise for the largest muscle of the body.* The **Article/Item Data** panel should now look exactly like this:

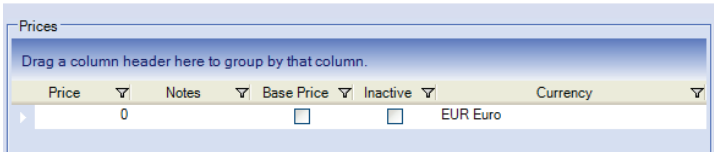


14. Press Ctrl + S or click the **Save Item** button on the toolbar.

    Your new product/service record is now saved in the INSIDER® database, but you also need to add its price(s).
15. On the toolbar, click the **New Price** button:

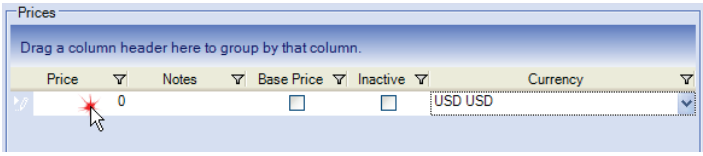


    A row for the new price record appears in the lower, **Prices** frame of the **Article/Item Data** panel:



16. *(Conditional)* If you need to change the currency, do it from the drop-down list of the Currency cell of the row (the cell under the **Currency** header):

17. In the new row, click the Price cell:



18. In the Price cell, type the desired value for the price, for example, *1750*.
19. *(Optional)* If you want to add some explanatory text about this price, press the tab key to move to the Note cell and type the text in it.
20. Press Ctrl + S or click the **Save Item** button on the toolbar. The price is now added to the product/service record. If you wish to add more prices for the product/service, simply repeat steps 15÷20.

Note:

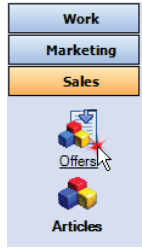
If you have entered more than one prices for a product/service, make sure to indicate which one is the main price by checking the Base Price box for the respective price record.

Tip:

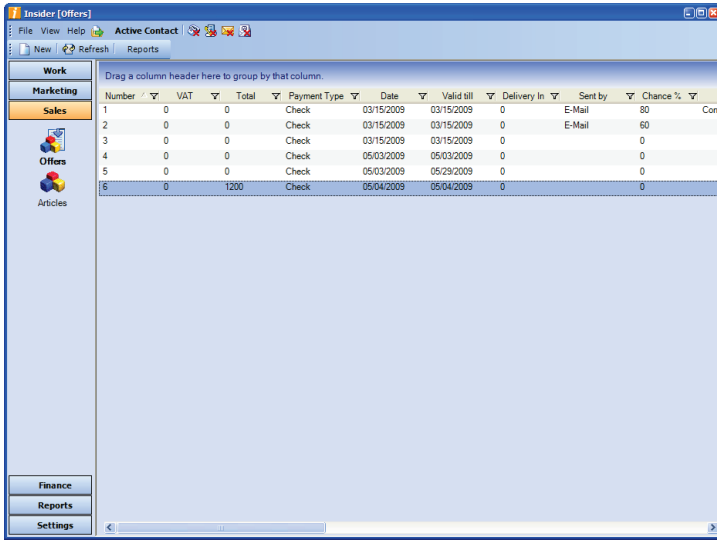
You can add additional prices at any time by clicking the **New Price** button.

Creating an Offer for a Client

1. Access the **Offers** screen. To do this, in the Navigation Pane, click the **Sales** panel header if closed and then the **Offers** button:

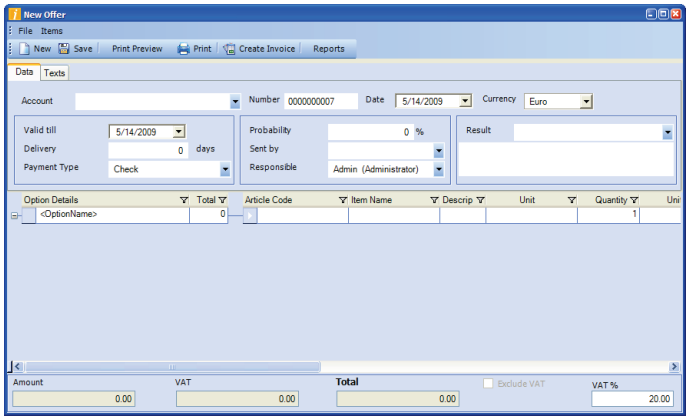


This will display the **Offers** screen and list your existing offers. Your INSIDER® window should now look something like this:

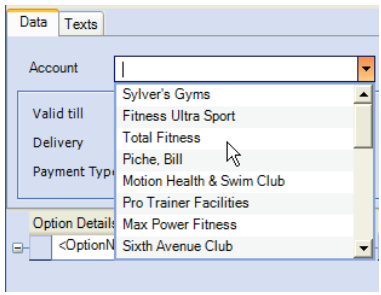


2. Either press Ctrl + N or click the **New** button on the toolbar.

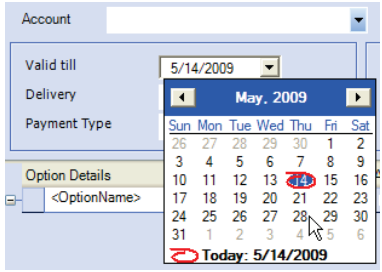
   This will display the **New Offer** form window ready for your input:



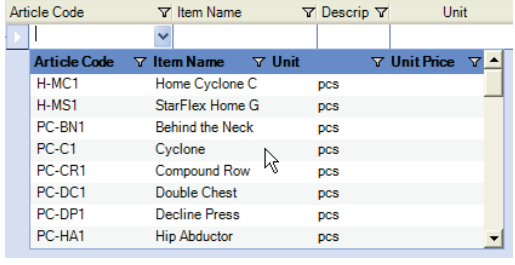
3. From the **Account** drop-down list, select the client you are creating the offer for (The **Account** drop-down list displays the names of your contacts.):



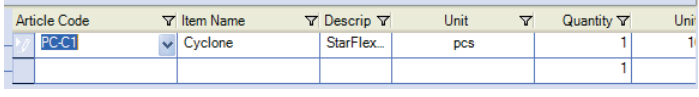
4. In the **Valid till** field just beneath the **Account** field, enter the deadline for the offer. The most handy way to do this is to use the field's drop-down calendar:



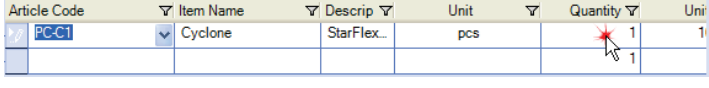
5. In the middle portion of the **Data** tab, in the right-hand side table, open the drop-down list of the Article Code cell (the cell under the **Article Code** header) and select the desired product/service:



Selecting an item from the drop-down list will cause the item's name, description and unit of measure to appear automatically in their respective cells in the row. The table with the row filled should now look like this:

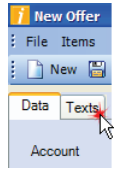


6. *(Optional)* The default quantity for the added product/service is 1. If you want to change it, click in the Quantity cell and enter the desired value:

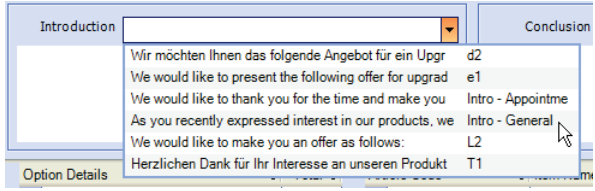


7. Click in the next (blank) row to commit the entered data.

8. If you want to add another product/service, repeat steps 5÷7 in the new blank row in the table. You can add as many products as you want.
9. Click the **Text**s tab to choose the text of the offer:

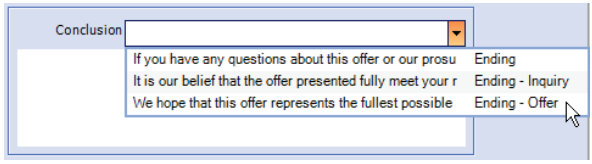


10. From the **Introduction** drop-down list, select the introductory text:



The selected text appears in the large text area beneath the **Introduction** field.

11. *(Optional)* In the text area, edit and modify the text as needed.
12. From the **Conclusion** drop-down list, select the closing text for the offer:

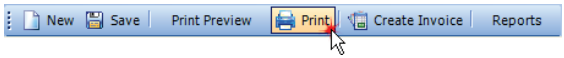


The selected text appears in the large text area beneath the **Conclusion** field.

13. *(Optional)* In the text area, edit and modify the text as needed.
14. When finished making entries for the offer, either press Ctrl + S or click the **Save** button on the toolbar.
15. *(Optional)* To see how the offer will look in print, click the **Print Preview** button on the toolbar:

This will display the print preview in a pop-up window. From here, proceed with either printing the offer or closing the window.

16. To print out the offer, click the **Print** button on the toolbar:



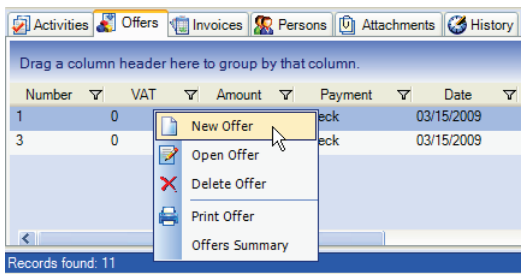
17. When finished working with the offer, close its window. This will take you back to the calling screen.

Note:

There is more to creating an offer than described here, like creating an offer with multiple options, assigning a different person in charge (by default it is the user who created the offer), recording the outcome after the offer has been made to the client and others, but explaining all options goes beyond the scope of this quick start guide. Please consult INSIDER® online help if in need for further details.

Tip:

You can also add an offer for the current contact from the **Account** screen: in the **Account** screen, select the **Offers** tab and then right-click anywhere in the tab beneath the column headers; after that, from the right-click menu, select **New Offer**:



This will open the new offer form window with the current contact pre-selected in the **Account** field.

Creating an Invoice from an Offer

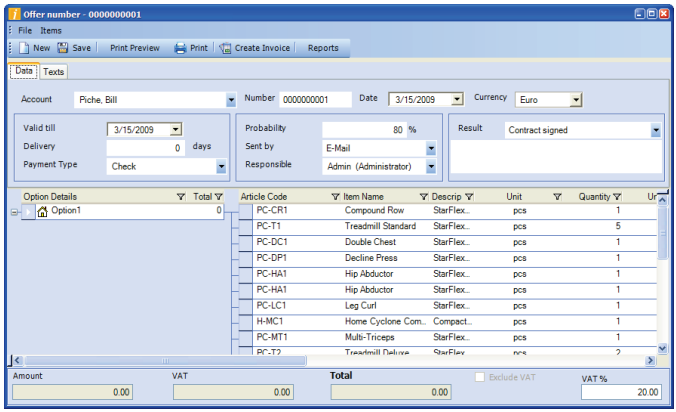
To create an invoice from a particular offer:

1. In the **Offers** screen, locate the record for the offer from which you want to create an invoice.

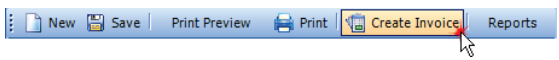
Tip:

> You can also locate the offer by client in the **Account** screen, **Offers** tab. The procedure will work the same from there.

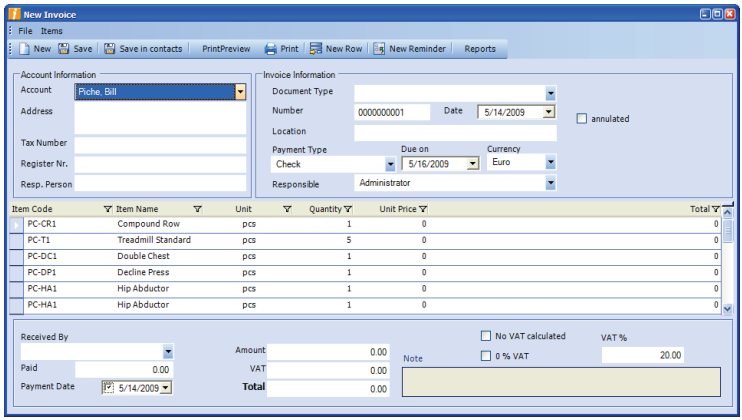
2. Double click the offer record. This will open the offer in detailed view in a form window:



3. In the toolbar of the window, click the **Create Invoice** button:



This will display the **New Invoice** form window with the information from the offer automatically entered in the respective fields:



4. Enter and edit the data in the fields as necessary. Be sure to select the proper **Document Type** and **Payment Type**.
5. When finished, press Ctrl + S or click the **Save** button and then close the window.

Creating an Invoice from Scratch

You can start the invoice creation process with a completely blank form. Use this procedure when you need to create an invoice that is not related to any particular offer recorded in INSIDER®. To create an invoice from scratch:

1. In the **Invoices** screen (Navigation pane > **Finance** panel > **Invoices**), either press Ctrl + N or click the **New** button on the toolbar.

   This will display the **New Invoice** form window (see the last picture in the previous topic).

Tip:

You can also initiate the invoice creation process from the **Account** screen, **Invoices** tab. The procedure will work in the same way except that the current contact will be pre-selected in the **Account** field.

2. Enter the information in the fields as necessary. Be sure to select the proper **Document Type** and **Payment Type**.
3. When finished, press Ctrl + S or click the **Save** button and then close the window.

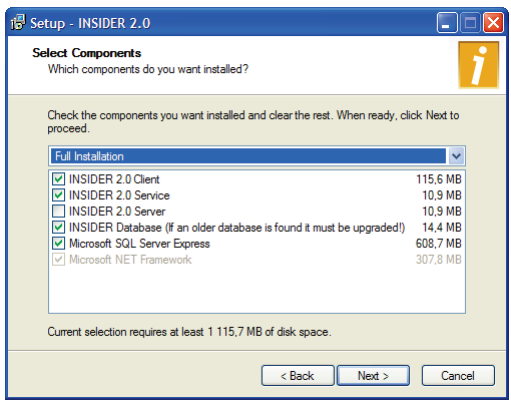
Part III
Getting Down to Business

In This Part:

- Customizing your INSIDER®
- How to Create Personalized Mailings
- How to Unlock the Full Version
- How to Delete the Sample Data

Customizing Your INSIDER® Installation

As you already know, when INSIDER® is being installed, the **Select Components** step of the setup procedure offers you several sets of pre-selected component choices:



Each of these pre-selected sets of components installs an INSIDER® configuration that is suitable for a particular purpose. The correct choice depends on the intended use of the machine on which you are installing INSIDER®: as an INSIDER® server, an INSIDER® client workstation, an INSIDER® server that is going to be used as a

workstation as well, or as a stand-alone machine without a network (See Table 2.).

Table 2 - Pre-configured installation choices

Component	Full Installation *(default)*	Client-Only Installation	Full Installation (with server)	Service-Only Installation	Server-Only Installation	Database-Only Installation
INSIDER Client	☑	☑	☑	☐	☐	☐
INSIDER Service	☑	☐	☐	☑	☐	☐
INSIDER Server	☐	☐	☑	☐	☑	☐
INSIDER Database	☑	☐	☑	☐	☐	☑
Microsoft Server SQL Express	☑	☐	☑	☐	☐	☑
Microsoft NET Frame-work *(disabled if already installed)*	☑	☑	☑	☑	☑	☑

Here is which pre-configured choice you should select according to your needs:

Table 3 - Configuration choices and when to select each of them

If this computer is…	Select…
the only machine with INSIDER® in your office	*Full Installation*
the INSIDER® server machine to which all other INSIDER® workstations are going to connect (this server machine will *not* be used as a workstation)	*Service-Only Installation*
the server machine to which all other INSIDER® workstations are going to connect and which will also be used as a workstation	*Full Installation*
an INSIDER® workstation (it connects to an INSIDER® server on another machine)	*Client-Only Installation*
a previously configured INSIDER® workstation on which you want to install a local database for training purposes	*Database-Only Installation*

Note:

1. The Full-Installation (with server) and the Server-Only Installation are same as the Full-Installation and the Service-Only Installation, respectively, except that the former two do not run the INSIDER® server as a Windows service and, therefore, it does not start automatically with Windows and login to the server machine is always required in order to use INSIDER® on a network. The Full-Installation (with server) and the Server-Only Installation choices are included in the setup for legacy reasons and there is no benefit using them in a clean installation. It is recommended to use Full-Installation and Service-Only Installation instead.
2. The INSIDER® sever can reside on a different machine than the SQL server.

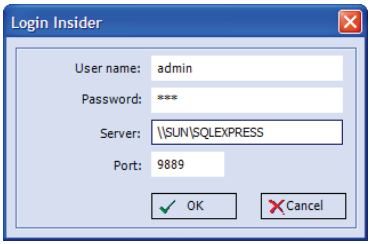
You can choose a pre-configured set (recommended), but you can also select and de-select individual components. (If you select individual components, and the selected options do not match any of the pre-existing configurations, the configuration is marked as “Custom.”)

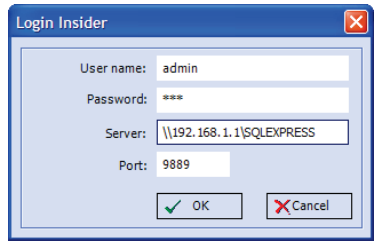
WARNING:

If you have selected individual components, make sure you have **NOT** selected both the **INSIDER Server** or the **INSIDER Service** option. **Only one of them should be selected** for the installation! **(INSIDER Service** recommended)

Using INSIDER® on a Network

If you are logging in to a workstation computer (that is, a computer which connects to an INSIDER® server residing on another machine), make sure in the login window, **Server** field, the name of the server computer (illustration on the left) or its network IP address (illustration on the right) is listed (and not the standard *localhost* name):





Note:

INSIDER® does not allow you to be logged in at the same time to two or more machines with the same user name. Therefore, when finishing your work with INSIDER®, make sure you exit the program so you could log in to another computer if necessary. Exiting the program after work is also a good practice from security point of view.

Customizing the Navigation Pane

Resizing the Navigation Pane

You may want to reduce the width of the Navigation Pane so you can have more space (and see more data) in the Information Display Pane.

To resize the Navigation Pane, point to the vertical splitter bar dividing the Navigation Pane and Information Display Pane. When the pointer turns into a double-headed arrow ⇹, drag the splitter left or right. If you drag the vertical splitter bar to the left (that is, towards the Navigation Pane), the Information Display Pane area will enlarge at the expense of the Navigation Pane.

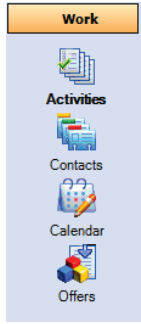
Changing the Display Order of the Navigation Pane Buttons

You can rearrange the order of the buttons in any panel of the Navigation Pane – just drag the buttons with the mouse up and down until you achieve the desired order.

Moving a Button from One Panel to Another

You can move any Navigation Pane button from its original panel to any other panel of the Navigation Pane. This feature is mainly used for moving the most frequently used buttons to **Work** because it is the panel that opens by default when INSIDER® starts so you won't need to go to the other panels anymore to access these buttons. Moving the Navigation Pane buttons in INSIDER® is a simple drag-and-drop operation:

1. Click and open the panel containing the button you want to move. Let's say, you work a lot with offers, so you would want to move the **Offers** button to the **Work** panel.
2. Point with the mouse to the button and drag it over the header of the panel you want to move it to (**Work** in this case). Do not release the mouse button yet.
3. Once the mouse pointer is properly positioned over the target panel header (**Work**), release the mouse button. The button is now moved.
4. *(Optional)* To verify the button is in its new location, click and open the respective panel header (**Work** in this case):



Tip:

You may want to copy a button instead of moving it. Thus a button will be available in both its new and its original locations. To copy a button:

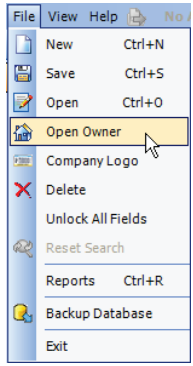
In step 2, press an hold down the Ctrl key. A plus sign appears next to the mouse pointer. When you release the button in step 3, the button will be copied and not moved.

Be careful when making the decision to copy a button – in the current version of INSIDER®, Navigation Pane buttons cannot be deleted, so a reckless use of this feature can clutter your Navigation Pane quite easily.

Adding Your Company Information

Adding your company information to INSIDER® allows your company contact information to be displayed on the offers, reports, and invoices the program generates. This is done through the Owner Company option. When you first install INSIDER®, the owner-company is set to the demo-company StarFlex and its fictitious contact information. You need to change it so you could start using INSIDER® for your actual business. (If the demo database has not been loaded, then the name of the owner company is *INSIDER Owner* and all other data fields for this company are blank.) To add your company info:

1. Make sure the **Account** screen is displayed (Navigation Pane > **Work** > **Contacts**). This will make the **Open Owner** option available in the **File menu**.
2. From the **File** menu, select **Open Owner**:



The owner company (that is, your company) record is displayed in the **Account** screen.

3. Click the **Name** field and change it to your actual company name.
4. Do the same with all other fields the information from which you want to be available (**Phone 1**, **Phone 2**, **Fax**, **e-mail**, etc.). Apart from your company name, no other fields are mandatory, but it is a good idea to have your company contact information as complete as possible.

Note:

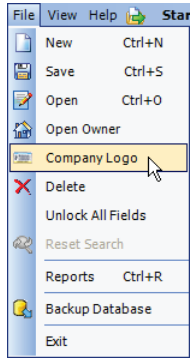
> Depending on the content of the database installed with INSIDER®, your Country, Region, and City might not exist in the drop-down lists of these fields. If this is the case, just type them into the fields manually and from this point on they will be added to the drop-down lists and will be available for selection. (When you attempt to save the data, the program will ask you whether to add these names to the lists. If you want them on the list, be sure to confirm.)

5. *(Conditional)* If the VAT (Value-Added Tax) in your country differs from the default value, change that value, too (in the **VAT%** field). The newly entered value will become the new default VAT value.
6. Click the Contact Financial tab and enter the appropriate data into its fields.
7. When finished entering your data, click **Save**.

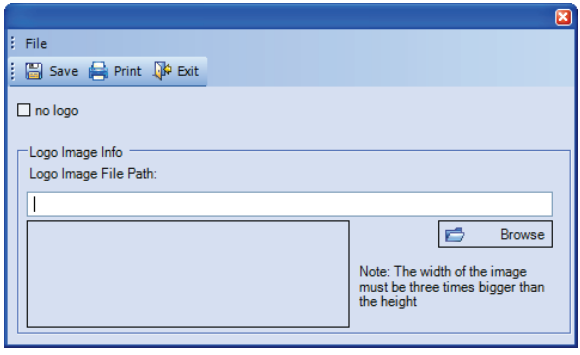
Adding Your Company Logo

Adding your company logo to INSIDER® causes the logo to be displayed on the offers and invoices the program generates. To add your company logo:

1. Make sure the **Account** screen is displayed (Navigation Pane > **Work** > **Contacts**). This will make the **Company Logo** option available in the **File menu**.
2. From the **File** menu, select **Company Logo**:



In the dialog that opens, specify the path and the name of the image file with the logo:



If necessary, use the **Browse** button to open the standard file open dialog for browsing for and finding the image file.

3. Make sure you have selected the correct image file (refer to the preview displayed in the lower half of the dialog) and then click **Save**.
4. *(Optional)* To see how the logo will look on the documents generated by INSIDER®, click the **Print** button. This will display a print preview of the document.
5. If necessary, edit the image with a graphics editing program and then re-load the logo (repeat steps 1÷4).
6. When finished, click **Exit**.

Note:

1. The width of the logo image must be three times its height (that is width-to-height ratio 3:1), otherwise your logo won't display properly.
2. If you chose to remove the logo (for example, when you estimate that your logo image would need some editing in order to display properly), simply check the **no logo** box and then click **Save**.

Changing the Administrator Password

The default administrator password, *123*, is devised to be easy to use and remember so you can conveniently log in and explore all INSIDER® features during the trial period. Before entering any real data and beginning the actual business use of the program, it is mandatory to change the administrator password in order to ensure the security of your operations. The actual administrator password must be secure enough and known only to the person with the administrator role to INSIDER® and to the company owner.

Tips for Creating a Secure Password

When creating your INSIDER® administrator password, consider the following:

- Long passwords are more secure than short ones.
- Actual words from the vocabulary of a language, like those you can find in a dictionary, are less secure than arbitrary combinations of letters but easier to remember.

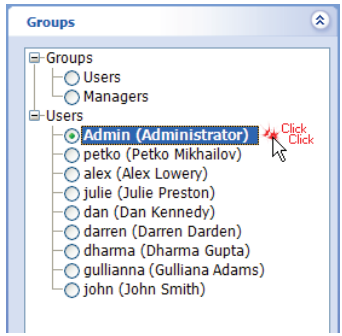
- Combinations of words, such as *shinynail* or *flyingrock* or *tallwater*, as well as combinations of words and numbers, like *infinity101* make more secure passwords than single words.
- Using both uppercase and lowercase letters in your passwords makes them more secure especially if you capitalize letters other than the first letter of a word, for example *ShinyNail* is more secure than *shinynail*, but *shInynaIl* is even better.
- Using non-alphanumerical characters, like *!@#$%* greatly improves the security of your password.
- Writing down a password on paper or in a file constitutes a security risk, though it may prevent problems with forgotten passwords.

For practical purposes, probably the best approach for a password is to combine a one or two words with numbers and put them down on paper and keep that paper in a secure location.

Steps for Changing a Password

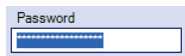
The following procedure can be used to change the password of any user, not just the administrator. To change the password of a user:

1. Access the **User Rights** screen. (In the Navigation Pane, click the **Settings** panel header to open it and then the **Users** button.)
2. In the **Groups** panel, double-click the user whose password you want to change, e.g. if you want to change the password for the administrator, double-click the **Admin (Administrator)** node in the **Users** tree.



This will display the **User Details** window which stores the settings for the selected user.

3. Open a plain text editor, such as Notepad.
4. In the editor, type the desired new password.
5. Select (highlight) the password and copy it to Windows clipboard (Ctrl + C). Make sure you have selected the entire password and not any white spaces next to it if such white spaces exist.
6. Switch back to INSIDER®.
7. With the mouse, drag and select all the asterisks in the **Password** field. All the asterisks should be now highlighted:



8. Paste the new password (Ctrl + V). You will see the highlight gone and, probably, change in the number of the displayed asterisks (The number of characters in the field at this moment corresponds to the number of asterisks.)
9. Click the **Save & Close** button. This will close the **User Details** window and apply the new password to the user. From this point on, this user will have to use his/her new password.
10. Switch to the text editor again and either save or discard the file in which you have typed the password. If you choose to save it, make sure to store it in a secure location.

Note:

You can type the password directly into the **Password** field and not use a text editor, thus skipping steps 3÷6 and 10, but this approach is prone to errors because, in the **Password** field, you cannot see what you type and INSIDER® does not require you to verify the new password.

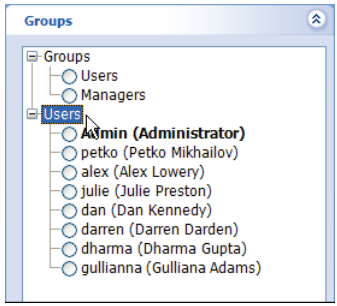
Recovering Lost Passwords

As a security precaution, passwords in INSIDER® cannot be recovered. If a user forgets his or her password, the administrator or another user with sufficient rights (typically with a **Manager** role in INSIDER®), can create a new password for him/her. In case no such user exists and the password for the **Admin** user is lost, then the only solution would be to uninstall INSIDER® while keeping the existing database (you will be offered this option at uninstall) and then install INSIDER® again without a database in order to prevent your database from being overwritten by the default one (make sure to clear the **INSIDER Database** option when selecting the options for setting up components).

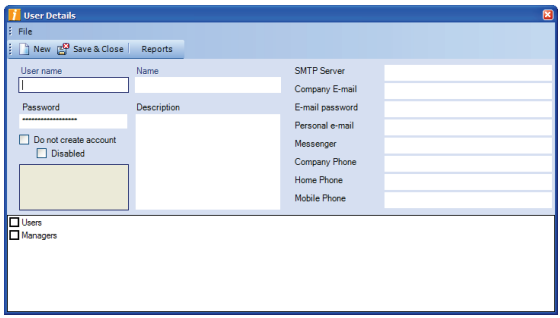
Creating New Users (New User Accounts)

You should create an individual user for every one of your employees who are going to work with INSIDER®. To create a new user:

1. Access the **User Rights** screen (Navigation Pane > **Settings** panel > **Users**.).
2. In the **Groups** panel, click and highlight the **Users** root node:



3. Click the **New** button on the toolbar. This will display the **User Details** pop-up window containing the form for entering a new user:



4. In the **User Name** field, type the INSIDER® user name for the employee, e.g. *john*.
5. Press the Tab key to move to the **Name** field.
6. In the **Name** field, type the actual name of the employee, e.g. *John Smith*.
7. Press the Tab key to move to the **Password** field.
8. In the **Password** field, type a password for the user. (Refer to "Tips for Creating a Secure Password" on page 59 if you need more guidance on this.)
9. In the large area at the bottom of the window, check either the **Users** or **Managers** box depending on which of these two INSIDER® user groups you want the user to be assigned to. The

user group determines what INSIDER® user rights the employee will have in the system.

Tip:

> The members of the **Managers** group have more rights than the members of the **Users** group. The main difference is that the Managers can see the assignments (in the **Activities** screen and in the **Calendar**) of the other users of the system while the Users can see only their own assignments (either created by them or assigned to them).

10. Fill in the other fields of the form as necessary.
11. When finished entering information in the fields, click the **Save & Close** button.

Tips:

1. You can set up the INSIDER® user rights individually for each user the right-hand side panel. (Select the user's node from the tree in the **Groups** panel and then edit the settings in the right-hand side panel.**)**
2. You can create custom user groups to handle multiple users with common INSIDER® user rights if the pre-defined user groups (**Managers** and **Employees**) happen to be insufficient for your needs.

Creating Personalized Mass Mailings

Introduction

With INSIDER®, you can easily create personalized mass mailings that you can send as email messages or printed letters to multiple recipients (for instance, a letter to your customers announcing a new product). To this end, INSIDER® utilizes the MS Word's mail merge feature (INSIDER® provides the recipient information and Word – the text of the form letter), so you need to be familiar with mail merge in order to be able to use this feature with INSIDER®. (You can find the information you need to know about mail merge in the MS Word online help as well as in the other available MS Word user documentation.) Needless to say, you need to have both INSIDER® and MS Word installed and fully functional on the computer on which you intend to perform the mail merge procedure. Also, it is important to carefully read the instructions that follow because the INSIDER® version of mail merge has certain idiosyncrasies and you will not be

able to perform it if you follow only the standard instructions provided in the MS Word documentation.

You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements (like the name and the address of the recipient). There are two pre-requisites to the mail merge procedure: a document, called "main document", with the text to be sent as a letter and a data source for the variable information. In the main document, the places for the variable data (e.g. the recipient names, the salute, etc.) are occupied not by regular text but by special placeholders (fields) and the actual content is retrieved from the data source during the mail merge procedure. (That data source, in our case, is INSIDER®.)

Before performing the mail merge, you need to have the main document created in MS Word and the fields for the variable data properly inserted in their respective positions. Once you have the main document ready, you start the mail merge procedure and Word creates the actual personalized letters, one for each recipient, in the form of either email messages, another MS Word document, or direct output to printer.

When performing a mail merge with INSIDER®, the main document is generated automatically from an MS Word template (.dot file). This spares you the need to manually match the main document to the data source as you would mandatory have to when performing a "normal" mail merge outside INSIDER®. Therefore, with INSIDER®-based mail merge, you first create not a main document but a main document template (Refer to the next section for details).

Note:

INSIDER®-based mail merge works with both MS Word 2003 and MS Word 2007. If MS Word 2007 is installed, it works in Compatibility Mode and creates the documents in MS Word 2003 format (.doc file name extension).

Creating the Main Document Template

Introduction

There are two types of fields that can be inserted in an MS Word document: standard Word fields, which are multi-functional and can be used for a variety of purposes, and specialized mail-merge fields, designed specifically for the needs of the mail merge feature. Normally (with the other data sources like MS Excel documents, text files, or MS Access) the variable data in the main document is represented and retrieved through mail merge fields. In the main document template however, the fields for the variable data must be Word fields and not mail merge fields. This makes creating the main document a lot easier, as you need not to select a data source for the fields any more (Word fields allow for advanced programming and automation so INSIDER® can link the fields to its data source automatically when the mail merge procedure begins; in the main document that is generated automatically during the mail merge procedure, Word fields will be replaced by proper mail merge fields).

Steps

1. In MS Word, create or open the document you want to use as a main document template.
2. *(Conditional)* Delete any text that is variable, i.e. any text that should be personalized, like the recipient name.
3. Insert a Word field for any block of variable text. For information on what fields to insert for what data, refer to the Allowed Field Names for the Main Document Template topic.

   To insert a Word field:

   a. Place the blinking cursor at the position where the variable text should be inserted, e.g. by clicking on it.

   b. Press Ctrl + F9. An empty (unnamed) Word field is inserted. (The field is indicated by curly brackets – {}.)

c. Within the brackets, type the name of the field. (Refer to the Allowed Field Names for the Main Document Template topic.)

4. When finished inserting fields, save the document as a Word template (.dot file). (Use Word's "Save as…" feature.)

Allowed Field Names for the Main Document Template

The following table maps the names of the Word fields you can use in the main document template (left column) and the respective INSIDER® data field names as they appear onscreen (right column). (For example, if you want to insert the name of the contact person in the template (information that appears in INSIDER® in the **Contact Person** field), name your Word field *Primary_Contact*)

Field Name – INSIDER® (all INSIDER® fields are from Account screen, Contact General tab)	**Field Name – Document**
Name	*Contact*
Contact Person (if more than one, the contact person marked as "Primary" will be used)	*Primary_Contact* (note the underscore between the two words)
Phone 1	*Phone*
E-Mail	*Email*
Fax	*Fax*
Country	*Country*
Region	*Province*
City	*City*
ZIP	*ZIP*
Address	*Address*
Web Page	*WebURL*
Department	*Department*

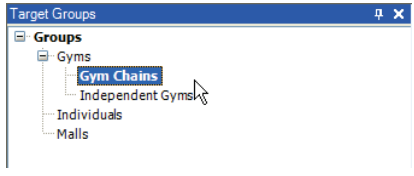
The Mail Merge Procedure

Introduction

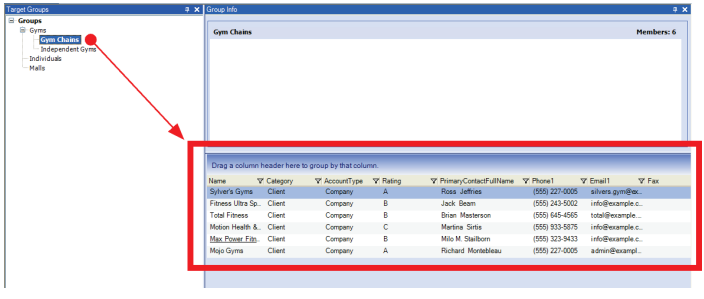
You can perform mail merge to a list of selected contacts from either the **Account** screen or from the **Contact Groups** screen. Performing mail merge from the **Contact Groups** screen is preferable if the recipient group of your letter matches, entirely or partially, some of your target groups or sub-groups. If it doesn't, either create a new target (sub-)group, or manually select the recipients from an existing group, or perform the mail merge from the **Account** screen using the search feature to filter the records so that the search results match the profile of the desired recipients as closely as possible.

Performing Mail Merge from the Contact Groups Screen

1. Access the **Contact Groups** screen. (In the Navigation Pane, click the **Marketing** panel header to open it if closed and then the **Target Groups** button.)
2. In the **Target Groups** panel, from the groups' tree, click and select the desired group or sub-group:

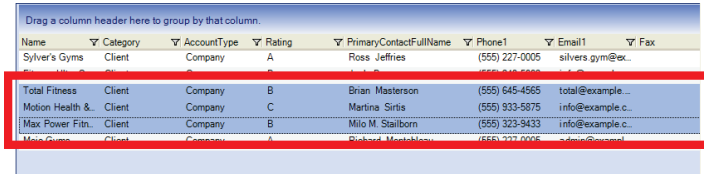


The contacts that are members of this group will be displayed in the Results Panel in the lower-right area of the screen:

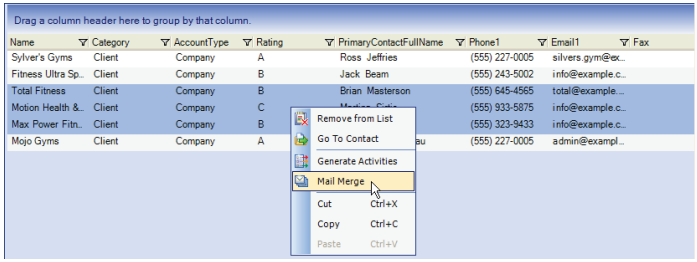


3. *(Optional)* Sort or group the records as necessary. (For details, refer to "Sorting and Grouping Records" on page 20.)
4. In the Results Panel, select the contacts you want to include in the mailing:
    - *left-clicking* with the mouse selects and deselects individual records
    - *Ctrl + left click* selects a record and keeps the previously selected record(s)
    - *Shift + left click* selects a range of records and deselects any previously selected records outside that range
    - *Ctrl + Shift + left click* selects a range of records while keeping any previously selected records outside that range
    - *Ctrl + A* selects all listed records

    The selected records become highlighted:

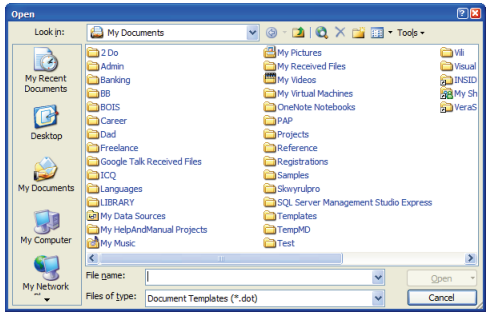


5. Right-click on the selection and from the right-click menu that appears, select **Mail Merge**:



A standard File Open dialog will appear prompting you for the MS Word main document template – only the .dot files will be

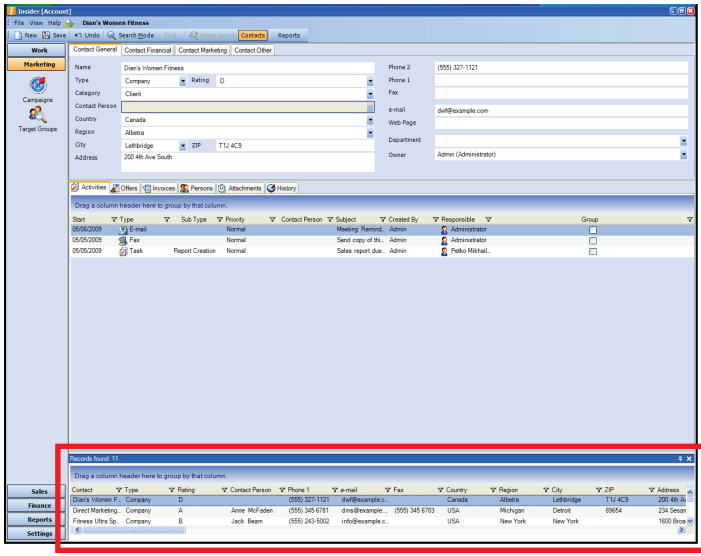
listed (Refer to "Creating the Main Document Template" on page 66 if you need more information about that template.):



6. Navigate through your folders and find and select your main document template and then click **Open**. MS Word creates 3 new documents:
    - **A document which is the same as your mail-merge template** (with the same name, just the file name extension is changed to .doc).
    - **A mail merge main document named "Document2.doc."** You use this document if you want to merge your letters to email instead of printing them. (For details, refer to MS Word online help.)
    - **The merged output document named "Form Letters1.doc."** This document contains your customized letters and is ready to print out.

Performing Mail Merge from the Account screen

1. Access the **Account** screen. (Navigation Pane > **Work** > **Contacts**)
2. In the **Contact General** tab, perform a search to find the contacts you want to send letters to. Make sure your search criteria define the desired recipients as closely as possible. (For details on how to perform the search, refer to "Finding Contacts" on page 29.) The found matches will be displayed in the Results Panel in bottom area of the screen:

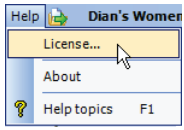


3. *(Optional)* Sort or group the records as necessary. (For details, refer to "Sorting and Grouping Records" on page 20.)
4. Further, the procedure is the same as described in the previous topic, "Performing Mail Merge from the Contact Groups Screen", steps 4÷6.

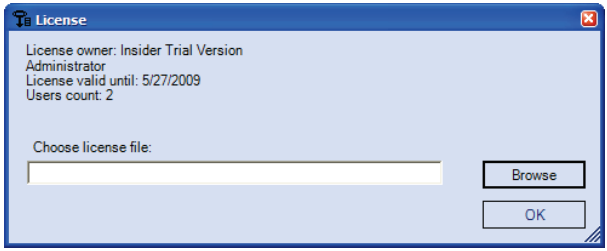
Unlocking the Full Version

To switch from the time-limited demo version of INSIDER® to the full unrestricted version of the program you need first to purchase INSIDER® and obtain a license file from either your INSIDER® dealer/consultant or directly from IRM (www.insider.bg). Once you have the license file, do the following to unlock your INSIDER® installation:

1. From the **Help** menu, select **License…**:



This will display the **License** pop-up window for entering the license file into the program:



2. In the field, enter the full path and filename of the license file. (Use the **Browse** button to navigate to the file location and to select the file.)
3. Once the path and name of the license file are properly entered into the field, click **OK**. Your INSIDER® should be now properly licensed and unlocked.

Deleting the Sample Data

Once you are about begin your real use of INSIDER®, you will need to delete the sample data with which the INSIDER® demo comes and any test data you might have entered while initially trying the program. To do so, in any screen, click and select the record you want to delete (or multiple records, for that matter) and after that, right-click on it and, from the right-click menu, select **Delete** or **Delete Selected** depending on which option is available in the current context.