

20.12.2012

Box Data

The Box Data lets you inter connect data within webCRM. It's similar to relations only it can connect any data type with any data type.

This document will show Box Data for Meetings. It is quite similar for all other data types.

The Box Data may appear like this when editing/viewing a Meeting:

The screenshot displays a webCRM interface for a 'Project participants' box. The box has a title bar with a database icon, the text 'Project participants', and icons for email, search, and edit. Below the title bar is a dark grey header with the text 'Project Start Up'. Underneath is a light grey area containing a memo: 'This project is a pilot project to establish proof of concept for the new implementation process.' Below the memo is a refresh timestamp: 'Refreshed: 11-12-2012 10:42'. The main content area lists three participants, each with a person icon, a company name, and a role: 'Aggrited Project manager Thomas Nielsen', 'Aggrited QA Manager Tom Brinkmann', and 'Bascon A/S Flemming Kristensen'. Blue lines with labels point to various parts of the interface: 'Common box title' points to the title bar; 'Optional headline' points to the 'Project Start Up' header; 'Optional Memo' points to the text area; and 'Box Data' points to the list of participants.

Company	Role	Name
Aggrited	Project manager	Thomas Nielsen
Aggrited	QA Manager	Tom Brinkmann
Bascon A/S		Flemming Kristensen

Configuration:

In the menu Configuration/Custom fields you can click the Edit Box Data icon. It is available for all data types



Example: Box data for Meetings

The screenshot shows the configuration page for 'Box data: Meetings'. At the top, there are navigation tabs: Home, Users, Data import, License, Drop down lists, Custom fields, Integration, and Main settings. The 'Custom fields' tab is active, and the 'Box data' icon is highlighted. Below the navigation, there are buttons for 'Save' and 'Custom fields: Meetings'. The main content area is titled 'Box data: Meetings' and contains several configuration options:

- Enabled: Yes
- Common box title: Project participants
- Headline per box: Yes
- Memo per box: Yes
- Default: Current Organisation

Below these options is a table with columns: Box data from, Link to data, Info input field 1, and Info input field 2. A note above the table states: 'Blank label for no field, Optional values for dropdown list'.

Box data from	Link to data	Info input field 1	Info input field 2
<input type="checkbox"/> Organisations Customer	No	Label: [text input] Values: [dropdown]	Label: [text input] Values: [dropdown]
<input type="checkbox"/> Persons Not resigned	Yes	Label: Comment Values: [dropdown]	Label: Project role Values: Project manager, Observer, Resource
<input type="checkbox"/> Activities Not completed	Yes	Label: Special action 1 Values: [dropdown]	Label: Special action 2 Values: [dropdown]

You can Enable/Disable Headline and Memo for each individual Box.

You can select "None" or "Current organisation" as default for selecting data for the box. When you select "Current organisation" you can select data entities for the box from the same Organisation as the Meeting without first having to search and find an organisation.

You checkmark each data type you want to enable to include for the box and optionally add a filter like only include Activities not yet completed.

"Link to data" = Yes/No can enable/disable links in the Box that will open the clicked data in the main window.

The 2 “Info input fields” are 2 optional data fields that are attached to each data you have in the Box. It can be a free text input or it can be a drop down list if you provide the input values (options).

Including data for the Box

When viewing / editing a meeting the Box Data will appear like this

You can click the Edit icon to add data for the Box and the below screen will be displayed:

Edit the Headline and Description (Memo).

Checkmark the data to include for the Box (all data types can be added when enabled in the configuration)

Optionally select other Organisations to include data from.

Note: When data is included for more Organisations you select one Organisation at the time, so you will not see all Persons included in the same screen.

	Person	Comment	Project role
<input type="checkbox"/>	Audrius Wier vizbaras@aggrit.lt		Project manager
<input type="checkbox"/>	Kim B. Nielsen kbn@dk.net		Project manager
<input checked="" type="checkbox"/>	Project manager Thomas Nielsen tbn@aggrit.dk	40 40 32 44	Project manager
<input checked="" type="checkbox"/>	QA Manager Tom Brinkmann tmg@aggritted.com		New staff member

When selecting a new Organisation you can search for the Organisation name or do a combined search for a Person (name, Email, Mobile number)

The box with included data will look like this:

 Project participants





Project Start Up

This project is a pilot project to establish proof of concept for the new implementation process.

Refreshed: 11-12-2012 10:42

-  **Aggrited**
Project manager Thomas Nielsen
-  **Aggrited**
QA Manager Tom Brinkmann
-  **Bascon A/S**
Flemming Kristensen

Refreshed:

The Box will display the included data as they were at the time they were included. In case some included data is changed or deleted you must click the View or Edit icon to refresh the data displayed in the box.

Click the View icon to see more details. The Box will open in a separate window and you can click the little blue arrows (when enabled) to view the data item in the main window.

 Meeting

Aggrited
Highstreet 12, BW 123C Hillside On Trent

Project Start Up

This project is a pilot project to establish proof of concept for the new implementation process.

 Meeting

 Aggrited Project manager Thomas Nielsen T:74527661892 D:70 27 16 61 M:40 40 32 44	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid #ccc;">Comment</td> <td style="border-bottom: 1px solid #ccc;">Project role</td> </tr> <tr> <td>New staff member</td> <td>Observer</td> </tr> </table>	Comment	Project role	New staff member	Observer
Comment	Project role				
New staff member	Observer				
 Aggrited QA Manager Tom Brinkmann T:74527661892	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid #ccc;">Comment</td> <td style="border-bottom: 1px solid #ccc;">Project role</td> </tr> <tr> <td>External consultant</td> <td>Resource</td> </tr> </table>	Comment	Project role	External consultant	Resource
Comment	Project role				
External consultant	Resource				
 Bascon A/S Flemming Kristensen T:87314400 M:25542932	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid #ccc;">Comment</td> <td style="border-bottom: 1px solid #ccc;">Project role</td> </tr> <tr> <td>External consultant</td> <td>Resource</td> </tr> </table>	Comment	Project role	External consultant	Resource
Comment	Project role				
External consultant	Resource				

Emails

Click the email icon for the box to send an email.

The box will display all Persons with an email address and also documents if such has been included in the Box data.

Checkmark the Persons to send an email to and optionally also checkmark the documents to attach to the email. Then click "Send email" and the below screen will be displayed:

Very important:

The exact same email will be sent to all recipients. This means that you should not use a template that merge to Person data. If you do so anyway the merged Person data will be the contact Person for the meeting in the above example.

Email templates: Only emails for type "Box data" will be displayed in the Template dropdown list.

When viewing/editing a data item you can click the Box Data icon to see in which boxes (if any) this current data is included. The list will be displayed in a separate window.

The screenshot shows the webCRM interface. At the top, there is a navigation bar with 'Main menu', 'Campaigns', and 'Utilities'. Below this is the 'COMPANY' logo. A secondary navigation bar includes 'Support', 'Activities', 'Organisations', 'Opportunities', 'Deliveries', and 'Calendar'. The main content area shows a 'View person' record for 'Webcrm A/S - Virum'. A red box highlights a 'Box Data' icon in the toolbar. An overlaid window titled 'webCRM - Windows Internet Explorer' displays the 'Person' record details and a table of linked box data.

Person Record Details:

- Webcrm A/S - Virum** [www](#)
- Danmark, Customer, Identifieret, Abildgaardsvej 96, 2830 Virum
- Erik Maltby [Email](#) T:70220690 M:+4522150150

Linked to box data

Person	Comment	Project role
Webcrm A/S - Virum 2830 Virum 14-12-2012 12:00 Project planning	Kick off Budget for 2013	1 Project manager
Aggrited BW 123C Hillside On Trent 14-12-2012 13:00 Project planning	Project Start Up This project is a pilot project to establish proof of concept for the new implementation process.	Project manager

Box Data – Search and List

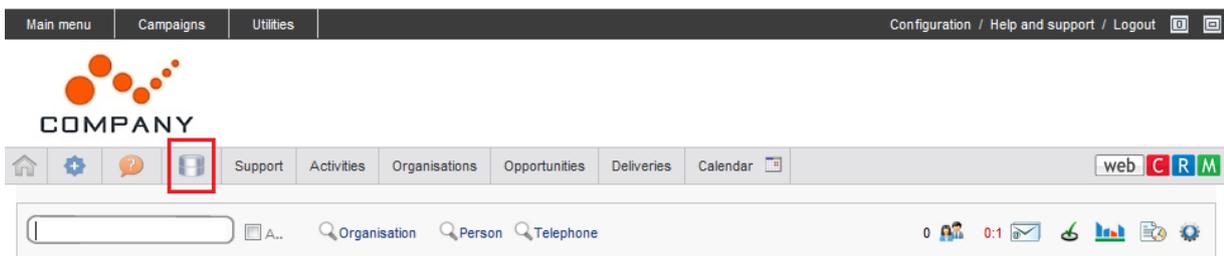
In Configuration/Main settings/Access levels you can enable/disable the standard Box Data search and list icon in the Main menu.

Note: It is not possible to create customized Overviews/Reports for Box Data. This is due to the complex data relations for Box Date.

Main menu

Inbound email	Enabled
Budget	Enabled
Support	Enabled
Approve new contact	Disabled
Box data	Enabled

When enabled you will see the Box Data icon in the main menu



The Box Data search and List lets you search for the Organisation name/type (Person name/email for the B2C version). You can also search for type of Box Data (when you have more than one type enabled) and for the status for the Box Data (Ongoing or Completed). Finally you can use the free text search for the Box Data Headline and Comment fields.

When creating new Box Data you should be sure that the Box Data Headline and/or Comment fields contains text that easily let's you search for the box data later on, for example a meeting date or project number.

Box data

Box data

Project participants

Status

Ongoing

Headline

Comment

Organisation: Name

Type

--- All ---

1-5 [5] Lines/page: 30

	Status	Headline	Comment	Organisation	City Post code/ZIP
	Ongoing	Project Start Up	This project is a pilot project to establish proof of concept for the new implementation process.	Aggrited	Highstreet 12 BW 123C Hillside On Trent