

SourceTap CRM Documentation

1.

2. Installation

2.1. SourceTap CRM Requirements

2.1.1. SourceTap CRM Requirements

SourceTap CRM is a J2EE application. The default installation comes self contained with the Jetty Application Server and an hSQL database. All you need to get it running is a Java Development Kit (JDK) version 1.4 or above, which can be downloaded from [Sun's website](#)

SourceTap CRM will work with most J2EE application servers, including:

- Orion
- Tomcat
- BEA Weblogic
- IBM Websphere

It will also work with most Relational Databases, including:

- Oracle
- Microsoft SQL Server
- Sybase
- DB2
- MySql
- PostgreSQL
- Cloudscape
- SAP DB

2.2. SourceTap CRM Installation Guide

2.2.1. SourceTap CRM Installation Guide

- Install the Java Development Kit (JDK) 1.4 or greater
- Download the software from Sourceforge Project Site

- unzip the file
- run start.bat or start.sh from the directory where you unzipped the files

3. Configuration

3.1. SourceTap CRM Configuration

3.1.1. SourceTap Configuration

The distribution comes preconfigured with a Jetty application server and an hSql database. This section describes how to configure SourceTap CRM to work with different application servers and/or databases

Here are some pointers to get you started:

Want to use SourceTap CRM with a different database? The [Database Configuration Guide](#) is what you need to start with.

If you want to run SourceTap CRM with a different application server, the best place to start is with the [Application Server Configuration Guide](#).

3.2. SourceTap CRM Database Configuration

3.2.1. SourceTap CRM Database Configuration

The Entity Engine from the OFBiz project is what SourceTap CRM uses to persist data to a database. You can find out more about why we chose the EE at the bottom of this page. See the configuration overview for a conceptual overview of what is being done here.

3.2.1.1. Configuring the Entity Engine for SourceTap CRM

The configuration of the Entity Engine is done through a simple XML file called entityengine.xml. This file is used to define parameters for persistence servers such as JDBC datasource parameters.

For SourceTap CRM, this file is located in the distribution at components/entiy/config/entityengine.xml.

As outlined in the overview, the settings which generally need to be configured are:

- Transaction Factory - see below
- field type - edit the field-type-name attribute of the <datasource> tag.
- datasource location - edit the jndi-name attribute of the <jndi-jdbc> tag relevant to your

database.

Transaction Factory

By default the Entity Engine tries to obtain a JTA transaction factory from the application server using JNDI. This table shows the different values for different application servers:

Orion, Resin, Tomcat and Weblogic(see also the Orion, Resin, Tomcat and Weblogic guides)

```
<transaction-factory class="org.ofbiz.core.entity.transaction.JNDIFactory">
  <user-transaction-jndi jndi-server-name="default"
    jndi-name="java:comp/UserTransaction"/>
  <transaction-manager-jndi jndi-server-name="default"
    jndi-name="java:comp/UserTransaction"/>
</transaction-factory>
```

JBoss (see also the JBoss 2.4.4 and JBoss 3.0.x guides)

```
<transaction-factory class="org.ofbiz.core.entity.transaction.JNDIFactory">
  <user-transaction-jndi jndi-server-name="default"
    jndi-name="UserTransaction"/>
  <transaction-manager-jndi jndi-server-name="default"
    jndi-name="java:/TransactionManager"/>
</transaction-factory>
```

Jetty (see also Jetty guide)

```
<transaction-factory class="org.ofbiz.core.entity.transaction.JotmFactory" />
```

3.2.1.2. Altering the Entity Model

The Entity Model describes the table and column layout that SourceTap CRM uses in a database. It can be completely altered without changing any of the internal workings of SourceTap CRM.

The model provided should work with almost any database (care has been taken to ensure the column and table names are SQL compliant).

The entity model is configured through an XML file called entitymodel.xml (located in the distribution at hot-deploy/sfa/entitydef/entitymodel.xml).

The format of the file should be fairly self explanatory - basically SourceTap CRM always refers to the entity-name and field-name attributes within the code. The type attribute of a

<field> tag should always match the type attribute of a <field-type-def> tag in your fieldtype-*.xml files.

To change where entities and fields are persisted in your database, simply add (or edit) the attribute table-name (for entities) or col-name (for fields).

3.2.1.3. Why we chose the Entity Engine

We chose the EE over CMP or BMP entity beans because:

- it is more portable between application servers
- table schemas are automatically created and updated
- using the field type definitions, we can add support for new databases very quickly
- it is faster than most CMP implementations and has some nice caching features

This document deals with configuring the entity engine for SourceTap CRM (but should be applicable to most applications). For more details on the entity engine itself and it's inner workings, see:

OFBiz Entity Engine Guide

describes the theory behind the entity engine, its architecture and usage patterns

OFBiz Entity Engine configuration guide

describes all of the entity engine configuration options, whereas this document just describes configuring the entity engine for SourceTap CRM

API Docs

the API docs for the org.ofbiz.entity package

3.3. SourceTap CRM Application Server Configuration

3.3.1. SourceTap CRM Application Server Configuration

Coming Soon!

4. Usage

4.1. SourceTap CRM Getting Started

4.1.1. SourceTap CRM Getting Started

SourceTap CRM Documentation

This document is intended to give you an introduction to the Lead Tracking System, and to give you enough information to test drive the demo system. The Lead Tracking System is a component of SourceTap's CRM application. The demo shows the standard functionality of the system in a typical implementation. The system is highly configurable so that it can be tailored to meet additional requirements in a very short time frame.

The screenshot displays the SourceTap CRM login interface. At the top, a blue header bar contains the SourceTap logo, the text 'Sales Force Automation', and several dropdown menus. Below the header, a central graphic features three business professionals (two men and one woman) standing next to a large document titled 'ALL COMPANIES Composite'. To the right of this graphic is a 'Registered User Login' section with input fields for 'User ID' and 'Password', and a 'Login' button. Below the login fields are two links: 'If your company is not registered yet, [click here to set up a new company.](#)' and 'For instructions on how to use this system, [click here to download the GettingStarted Guide.](#)'. On the left side of the interface, there is a vertical sidebar with links for 'Sales', 'Services', 'Reports', and 'Admin'.

Login Screen

4.2. How-To

4.2.1. Importing Data

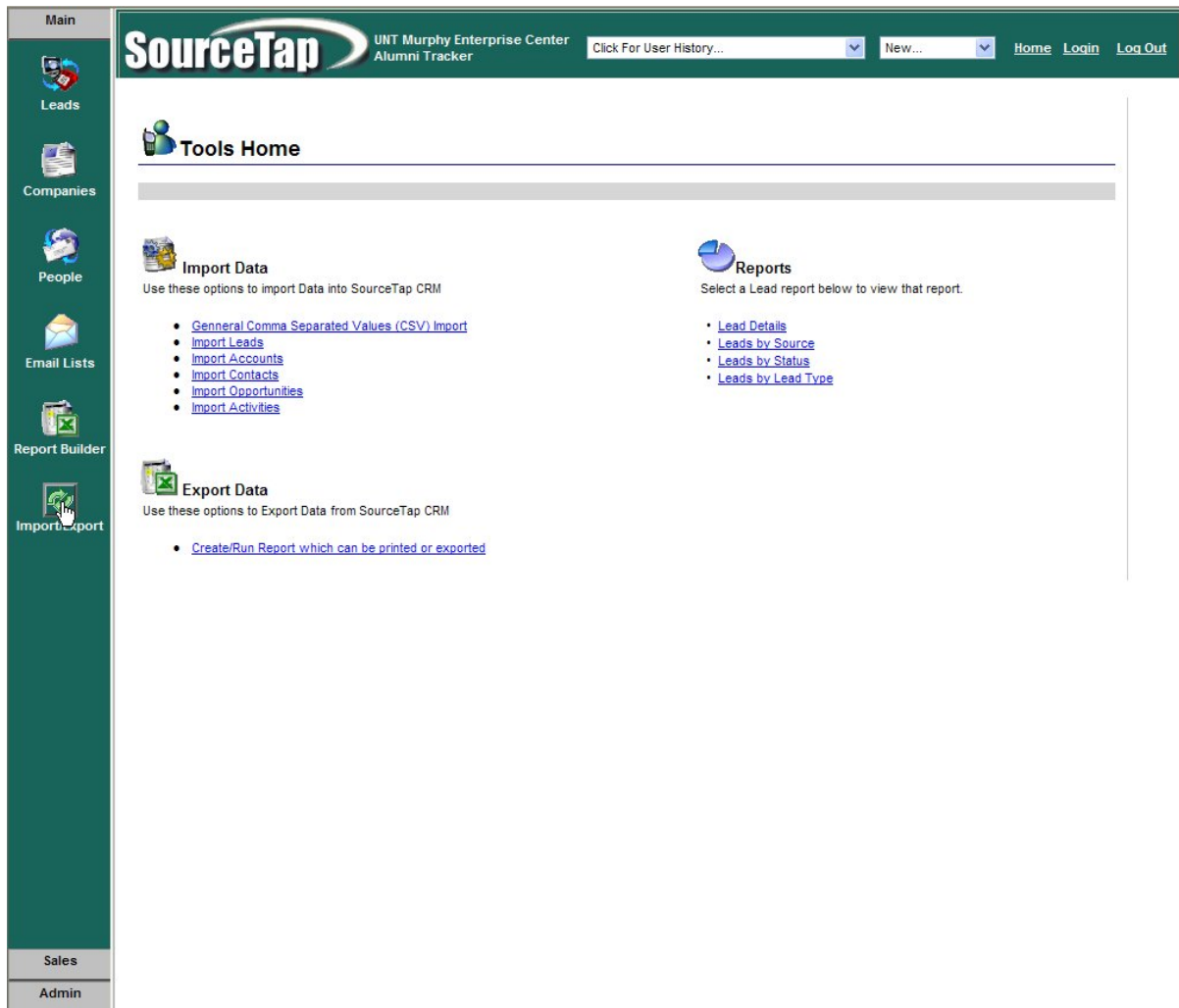
4.2.1.1. Importing Data

Data can be imported into the SourceTap CRM from comma separated (CSV) flat files. The system supports importing of leads, accounts, contacts, and opportunities. The first line of the CSV file should contain header information with the names of the fields being imported. An example import file is shown below

```
Prefix,First,Last,Address1,Address2,City,State,Zip,Employer
Mr. and Mrs.,James, Smith,101 First,Suite 100,Dallas,TX,750001,IBM
Mr. and Mrs.,George, Jones,PO Box 101,,Plano,TX,75093,Microsoft
|
```

Sample Import File

To import a file choose the Import/Export option from the main menu



Sample Import File

From the Import Data option, choose the type of data you want to import. It is recommended

that accounts and contacts be imported as leads first and then converted to accounts and/or contacts, rather than directly into accounts and contacts. The reason for this is that the import process will import all data as new records. It does not attempt to match imported data to existing data in the system. On the other hand, the lead conversion process will attempt to match the lead to be converted with existing accounts and contacts, and it will give you the option to update existing information or convert the lead into new records. The lead conversion can be done on a single lead or on a list of leads.

The first step of the import process is to upload the file to the server.



Import File Selection

Once the file is uploaded, you will be asked to map the columns in the import file to the fields in the database. The system will attempt to automatically map fields by matching the column names in the first row of the CSV file to field names in the database.

Step 2. Map fields in the File to the Table.

Table Field	File Field	Fixed Value
Lead ID	NOT MAPPED	
First	First	
Last	Last	
Title	NOT MAPPED	
Status	NOT MAPPED	
Email	NOT MAPPED	
Business Phone	NOT MAPPED	
Home Phone	NOT MAPPED	
Fax	NOT MAPPED	
Mobile Phone	NOT MAPPED	
Pager	NOT MAPPED	
Company Name	Employer	
URL	NOT MAPPED	
Address	Prefix	
Address1	First	
Address2	Last	
Address3	Address1	
	Address2	
	City	
	State	
	Zip	
	Employer	
City	City	
State	State	
Zip	Zip	
Country	NOT MAPPED	
Owner	NOT MAPPED	
Active	NOT MAPPED	
Validated	NOT MAPPED	
Lead Source	NOT MAPPED	
Lead Source Details	NOT MAPPED	
Add imported data to Existing List or create a new List		
Set Identifier for imported data to Existing Identifier or create a new Identifier		

File Fields Not Automatically Mapped
Employer

import

Import Field Mapping

You should verify that the field matching is correct before proceeding. The mapping will match fields based on the first field in the database that contains the text in the column

header label, so it may not always map fields correctly. In the file listed above, the two columns in the import file: "Address" and "Address2" should be mapped to "Address1" and "Address2" in the database. However, there is also an "Address" field in the database, so the "Address" column in the file is initially mapped to "Address". In order to fix this, you should change the "Address" field to "NOT MAPPED" and map the "Address1" database field to "Address" from the file.

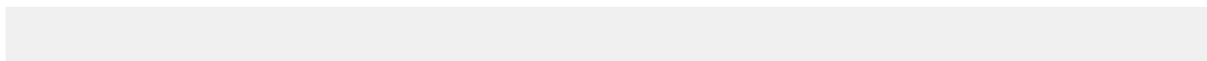
If the column label in the file doesn't match any database fields, the screen will show the unmatched columns in the "Fields Not Automatically Mapped" area of the mapping screen. You should determine if any of the unmapped columns need to be imported, and if so, you should set up the mapping before proceeding. The mapping screen lists all of the fields in the database, and for each field, there is a drop down containing all of the columns from the import file.

In addition to mapping input columns from the CSV file to the fields in the database, you can also set fields in the database to constant values by filling in the "Fixed Value" field on the screen. This is useful in cases where you want to set a field in the database such as "Lead Source" to a constant value.

At the bottom of the screen, you are giving the ability to add the imported data to a list. You can either add the data to an existing list by choosing one of the existing lists from the dropdown, or you can create a new list by entering a list name in the text field next to the dropdown. You would typically add imported data to a list if you wanted to perform some activities on the items in the import file as a group. Currently, this is primarily used with the mail merge functionality, which requires a list to perform the merge against. You can also create lists after importing the data by creating a query, but this assumes that you have the ability to define a query that will match the records that have been imported.

You can also use identifiers to tag imported records. Leads, contacts, and accounts can be associated with identifiers, which make them easier to find and group together. At the bottom of the import mapping screen, you are given the option to set assign an existing identifier to the imported record or to create a new identifier and assign it to the imported records.

Once you hit the "import" button, the import process will begin. Once it is complete, you will be given a message telling you the number of records imported and the elapsed time of the import



Imported 2 records in 4.0 seconds (2.0/per record)

Import Results

4.2.2. Using Queries

4.2.2.1. Using Queries

Queries give you the ability to find the data you are looking for. You can create a query and save the query definition so that the query can be run again with a single click. You can also save the results of a query to a list for further processing, such as for mail merge.

Some screens, such as the Lead and Contact Home screens, have a simplified query interface with a few of the more common fields available to be searched. For example, the main Contact screen shown below allows you to query based on first name, last name, and city.

The screenshot displays two side-by-side web application interfaces. The left interface, titled 'Contact Search', features a search form with fields for 'First Name', 'Last Name', and 'City'. Below these fields is a 'Save As:' field and a 'Run/Save Query' button. A green 'Advanced' link is positioned below the 'Run/Save Query' button. The right interface, titled 'CONTACTS HOME', shows a header with a user icon and the title. Below the header is a 'CONTACTS' section with a dropdown menu and buttons for 'New' and 'Customize'. A table with columns 'Name', 'Contact Name', 'Type', 'Status', 'Account', and 'Business Phone' is displayed. Below the table is a row of buttons labeled with letters 'a' through 'z' and an asterisk. At the bottom of the 'CONTACTS HOME' interface, there are two sections: 'Contact Tools' with links for 'Import Contacts', 'Export Contacts', and 'Email Contacts'; and 'Reports' with links for 'Contact Details' and 'Contact by Source'.

Contact Home

For more query options, you can click on the "Advanced" link next to the "Run/Save Query" button. This will give you the ability to search on all available fields. There are two different

query modes, standard and advanced. The default query mode is controlled by a user preference setting. The standard query screen looks like screen shown below:

CONTACT: Query

New Edit Detail Advanced Query Delete Copy Print Customize

ID (SSN):	First Name:	Last Name: Smith
Business Phone:	Type: ALUMNI	Title:
Home Phone:	Mailing Address:	
Fax:	City: Dallas	State:
Mobile Phone:	Country:	Zip:
Email Address:	Account:	
Status:	Gender:	Race:
Owner:	Spouse ID:	Marital Status:
Spouse Name:	Full Name:	Maiden Name:
Contact Name:	Suffix:	Professional Suffix:
Prefix:		
Primary: <input type="checkbox"/>		

Save Query Definition: Save Results to List: Run/Save Query

Contact Standard Query

This screen allows you to search using query by example. You fill in the values you want to match and then run the query. The query will find any results where the specified fields start with the specified value. For the screen shown above, the query would find all contacts with a last name starting with "Smith", a city that starts with "Dallas", and a type that starts with "Alumni". The query will only return results where all the conditions are met.

The advanced query screen looks like the screen shown below:

CONTACT: Query

New Edit Detail Standard Query Delete Copy Print Customize

Field	Condition	Value	Action
Last Name	STARTS WITH	Smith	X +
City	=	Dallas	X +
Type	=	ALUMNI	X +
Gifts Amount	>	500	X +
Gifts Gift Date	BETWEEN	2000-01-01,2003-12-31	X +

Save Query Definition: Save Results to List: Run/Save Query

Contact Advanced Query

This screen allows you to perform more complex queries. You have the option of using the following conditions:

- **STARTS WITH** - finds records where the field value begins with the specified value
- **=** - finds records where the field value exactly matches the specified value
- **CONTAINS** - finds records where the field value contains the specified value anywhere in the string
- **ENDS WITH** - finds records where the field value ends with the specified value
- **<** - finds records where the field value is less than the specified value
- **>** - finds records where the field value is greater than the specified value
- **<=** - finds records where the field value is less than or equal to the specified value

- **>=** - finds records where the field value is greater than or equal to the specified value
- **NOT EQUALS** - finds records where the field value does not match the specified value
- **BETWEEN** - finds records where the field value is between two specified values. When using BETWEEN, you should enter two values separated by a comma.
- **IN** - finds records where the field value is in a list of specified values. When using IN, you should enter a list of comma separated values
- **NOT IN** - works the opposite of the IN condition

In addition to being able to enter different condition operators, you also have the ability to search for values in related tables. For example, the query shown above lets you search for contacts with a first name that starts with "SMITH", who live in "Dallas", who are "ALUMNI", and who have given gifts greater than \$500 between January 1, 2000 and December 31,2003.

When you run a query, you can save the query definition so that it can be reused easily. If you enter a name in the "Save Query Definition" field, the query definition will be available in the Query drop down field on the associated list screen. Query definitions are dynamic, meaning that the next time you run the query, you may get different results if records have been added, deleted, or modified.

You can also specify that the results of the query should be saved to a list, which can be used in further processing, such as mail merge. This is done by filling in the "Save Results To List" field before running the query. Saved lists are static, meaning that the results are stored in the list when the query is run. Any inserts, updates, or deletes to the database will not affect the results of a saved list.

4.2.3. Creating Reports

4.2.3.1. Creating Reports

The Report Builder allows you to create and run custom reports. Reports can be displayed to the screen or exported to Excel, CSV, or XML. The main screen, shown below, contains a list of pre-defined reports and gives you the ability to create new reports.

Leads

Companies

People

Email Lists

Report Builder

Import/Export

Choose an Existing Report

Report Name	Action
Contact Mailing List	Remove?
dallas leads	Remove?
Phone List	Remove?

Create a New Report

Report Type
Accounts
Contacts
Leads
Opportunities









Report Builder

The top portion of the screen shows existing reports. When you select an existing report, you will be taken to the report definition, which will give you the ability to modify the report prior to running it. The bottom portion of the screen gives you a list of report types that you can create

The screen below shows the report definition screen.

Available Fields		Report Display Fields
Convert to Account/Contact	 	First
Owner		Last
First		Company Name
Last		Title
Company Name		
Title		
Business Phone		
Mobile Phone		
Fax		
Pager		

Define Conditions for Which Data You want to Retrieve

Field	Condition	Value	Action
City	equals	Dallas	 
<input type="text"/>	=	<input type="text"/>	 
<input type="text"/>	=	<input type="text"/>	 
<input type="text"/>	=	<input type="text"/>	 

Select Fields to use to Sort Results

Available Fields		Report Sort Fields
Convert to Account/Contact	 	Last
Owner		First
First		
Last		
Company Name		
Title		
Business Phone		
Mobile Phone		
Fax		
Pager		

Save Report As:

Report Definition

The report definition screen allows you to choose which fields are show in the report, what criteria will be used to retrieve data for the report, and what the sort order of the data should be.

To add fields to the report, you select fields in the "Available Fields" select box and move them to the "Report Display Fields" select box using left arrow button between the boxes. You can select multiple fields at the same time by using the CTRL and SHIFT keys. If you hold down the CTRL key, each field you click will be hilited. If you hold down the SHIFT key, all fields between the first field clicked and the last field clicked will be hilited. When you use the left arrow button all hilited fields will be moved. Similarly, you can remove fields from the report by hiliting them in the "Report Display Fields" select box and using the right arrow button to move them back to the "Available Fields" select box. You can alter the order of the fields in the report by using the up and down arrow buttons to the right of the "Report Display Fields" select box

Report Criteria are defined in the same way that you handle [advanced queries](#). You can remove a search condition by clicking on the red "X" button in the action column. If you need to add additional conditions, you can click on the green "+" button in the action column.

The order that data is displayed in the report are defined in the "Sort" section of the screen. Adding, removing, and ordering sort columns is done in the same way that you choose the fields to display in the report.

If you want to save the report so that it can be rerun at a later date, you should enter a name in the "Save Report As" field.

The figure below shows the report output screen

391 items found, displaying 31 to 60. [First/Prev] 1 , 2 , 3 , 4 , 5 , 6 , 7 , 8 [Next/Last]			
First	Last	Company Name	Title
Montgomery	Bennett	Ashford Hospitality Trust Inc.	CEO
Katherine C.	Berg	Interprise	
Betty and Marvin	Berkeley		
Marvin	Berkeley		
Gene S. Berchner	Berchner	Greenbriar Corp.	CEO
Kings	Besl	Lone Star Technologies, Inc.	
Wade J. Best	Besl	Lone Star Technologies Inc.	CEO
Robert W. Best	Besl	Atmos Energy Corp.	CEO
David	Bezman		
Bill	Bledsoe		
King	Bourland		
Circle	Bowers		
David A. Bowers	Bowers	CompX International Inc.	CEO
Shuart	Bowers		
Ed H. Bowman	Bowman	Sourcecorp Inc.	CEO
Steve	Box Jr		
Deborah	Bozeman	Those 3 Reps Inc	
David W. Brandenburg	Brandenburg	Intervoice Inc.	CEO
Norman	Brinker		
Larry	Brinkley		
Dawn	Brinson	Brinson Benefits Inc	
Ron	Britton		
Doug Brooks	Brooks	Brinker International Inc.	CEO
Julie	Brown		
Harry	Brownlee		
Harry	Brownlee	Maxson-Mahoney-Turner, Inc	
Kevin R.	Bruce	Strategic Equipment & Supply Corp.	
Amthal	Bruce		
Don	Buchholz	Southwest Securities	Chairman
Don	Buchholz	SWS Group, Inc	
Export options: <input checked="" type="checkbox"/> Excel <input type="checkbox"/> XML <input type="checkbox"/> CSV			

Report Results

The top of the screen shows the number of records returned by the report and allows you to page thru the results. The middle portion of the screen contains the actual report results. You can dynamically alter the sort order by clicking in the column headers. The bottom portion of the screen lets you export data in Excel, XML, or CSV formats.

4.2.4. Exporting Data

4.2.4.1. Exporting Data

Data can be exported to Excel, XML, or CSV format using the Report Builder. See the section on [Creating Reports](#) for more information.

4.2.5. Lead Conversion

4.2.5.1. Lead Conversion

Lead Conversion is the process of converting a lead into an account, contact, and/or opportunity. Leads are typically generated from marketing events, such as trade shows or mailing campaigns. Once enough information is gathered about a lead to qualify that lead as a potential opportunity, the lead can be automatically converted to an account and/or contact. SourceTap CRM allows you to convert leads on a case by case basis, or to convert a whole list of leads to accounts at the same time.

Conversion of a Single Lead

Individual Leads can be converted from the Lead Detail page. This is done by clicking on the "Convert this Lead to Account/Contact/Opportunity" link as seen in the screen below:

David Anderson

New Edit Detail Query Delete Copy Print Customize

First: David	Last: Anderson	Title:	
Status: Open	Email:	Business Phone: 214-812-2211	
Home Phone:	Fax:	Mobile Phone:	Pager:
Company Name: TXU	URL:		
Address: 1061 Bryan Street	City: Dallas	State: Texas	
	Zip: 75201	Country: United States	
Owner: UNT Administrator	Active: Yes	Validated: Yes	
Lead Source:	Lead Source Details:		
Ownership Type:	Stock Symbol:	Annual Revenue:	
SIC Code:	Industry:		
# Employees:	DUNS Number:		
Business Description:			
Opportunity Amount:	Opportunity Rating:		
Opportunity Description:			
Full Name: David Anderson	Prefix:	Suffix:	Professional Suffix:
Created By: UNT Administrator	Created Date: 07/15/2004 12:52 PM		
Modified By: UNT Administrator	Modified Date: 07/15/2004 12:52 PM		

Convert to Account/Contact: [Convert to this Lead to Account/Contact/Opportunity](#)

Identifiers Activities Notes Attachments

Identifiers

Identifier ID

CERT 2004

Edit Select Customize


Lead Conversion Step 1

After you click on the "Convert" link, you are taken to a screen that allows you to set the conversion options, as shown below:

Convert Lead to an Account, Contact, and Opportunity

Lead Information	
Lead Name:	David Anderson
Company Name:	TXU

Account creation option	
<input type="radio"/>	Create a new Account for this Lead
<input type="radio"/>	Update existing Account with name TXU COMMUNICATIONS and id 000020988-A
<input checked="" type="radio"/>	Update existing Account with name TXU ENERGY SERVICES and id 000019016-A

Opportunity Name:	TXU Opportunity 1
Opportunity Stage:	target 
Create Contact:	<input checked="" type="checkbox"/>
Create Opportunity:	<input checked="" type="checkbox"/>

convert



Lead Conversion Step 2

The options screen gives you the ability to create a new account for this lead or to map the lead to an existing account. The system will find Accounts with names that are similar to the company name associated with the lead, and give you a list of accounts that the lead might be linked to. You can also control whether the conversion process will also create a contact or opportunity for the lead. If you choose to create an opportunity, you can set the name of the opportunity and the initial stage to be set on the new opportunity.

Once you click on the "convert" button, you may be taken to a screen that lets you map the lead to an existing contact. This step is only done in the case where you choose to map the lead to an existing account and where there is an existing contact in that account with a name that matches the lead being converted. After this, you will be shown a confirmation screen, as shown below, which will give you a final chance to change things prior to initiating the conversion.

Convert Lead to an Account, Contact, and Opportunity

Lead Information	
Lead Name:	David Anderson
Company Name:	TXU

Opportunity Name:	<input type="text" value="TXU Opportunity 1"/>
Opportunity Stage:	<input type="text" value="target"/> ▼
Create Contact:	<input checked="" type="checkbox"/>
Create Opportunity:	<input checked="" type="checkbox"/>

Lead Conversion Step 3

Once the lead is converted, you will get a message confirming the conversion and given a set of links that allow you to navigate to the newly created account, contact, or opportunity, as shown below:

Lead Converted

Click [here](#) to view the converted Account





Click [here](#) to view the converted Contact

Click [here](#) to view the converted Opportunity

Lead Conversion Step 4

The screen below shows a what a typical contact looks like after conversion

CONTACT: David Anderson

 New
  Edit
  Detail
  Query
  Delete
  Copy
  Print
  Customize

ID (SSN):	First Name: David	Last Name: Anderson
Business Phone: 214-812-2211	Type: Regular	Title:
Home Phone:	Mailing Address: 1061 Bryan Street	
Fax:	City: Dallas	State: Texas
Mobile Phone:	Country: United States	Zip: 75201
Email Address:	Account: TXU	
Status: Active	Gender:	Race:
Owner: UNT Administrator	Spouse Name:	Marital Status:
Spouse ID:	Full Name: David Anderson	Maiden Name:
Contact Name:	Suffix:	Professional Suffix:
Prefix:		
Primary: Undefined		

Employment Family Education Gifts Pledges Identifiers Opportunities Activities Web Links Other Info Notes

Identifiers

 Edit
  Select
  Customize

Identifier ID

CERT 2004


Lead Conversion Step 5

Conversion of Multiple Leads

In order to import contacts into the system, it is recommended that you first import them as leads and then convert them. This helps eliminate the possibility of duplicate contacts being created, as the conversion process allows you to choose whether to create new accounts/contact information or map the lead to an existing account/contact.

To make this process as easy as possible, the system allows you to convert multiple leads at the same time. This option is available in the "Mass Convert Leads" link from the Lead Home page, as shown below:

SourceTap CRM Documentation

**Lead Search**

Enter one or more values to search for leads.

First Name:

Last Name:

Company:

Bus. Phone:


City:

Enter a name if you want to save the query.

Save As:

Advanced

Run/Save Query

**Quick Create**

Add a new lead here.

Lead Type:

First Name:

Last Name:

Title:

Company:

Bus. Phone:


Address:

City:

State:

Zip:

Save

**LEADS HOME**

Lead List

Last Query

New

First Name

Last Name

Company

Title

Business Phone

Yum! Brands, Inc.

502-874-8300

a

b

c

d

e

f

g

h

i

j

k

l

m

n

o

p

q

r

s

t

u

v


w

x

y


z

*

**Lead Tools**

Use these tools to manage your leads.

- Import Leads
- Export Leads
- Email Leads
- Mass Convert Leads to Accounts and Contacts
- Generate form to capture leads from your website

**Reports**

Select a Lead report below to view that report.

- Lead Details
- Leads by Source
- Leads by Status
- Leads by Lead Type

Lead Home

The first step is to choose a list of leads to convert, as shown in the screen below:

Choose a List to convert

List Name	Action
1 person list	Del View
2003 Leadership Luncheon	Del View
2004 DFW Top 200 Public	Del View
2004 DFW Top 76	Del View
august leads	Del View
Board of Regents	Del View
CERT 2004	Del View
President's Council	Del View
Sigma Phi Epsilon	Del View
Women Owner New	Del View

Mass Convert Step 1

If you need to create a list, you can do it by creating a [query](#) and choosing the save results as list option. The list select screen allows you to view the leads in the list or to delete the list or to start the conversion process. If you delete the list, it will not delete the underlying leads, it will merely remove the list. To begin the conversion process, click on the list name. This will take you to the conversion options page, as shown below:

Choose Setting for Lead Conversion

Note: Unless you are sure that none of the Leads are already in the system as Accounts and Contacts, you should choose the "Find Matching Accounts" option to review the data prior to conversion.

Find Matching Accounts:	<input checked="" type="checkbox"/>
Create Contact:	<input checked="" type="checkbox"/>
Create Opportunity:	<input type="checkbox"/>
Opportunity Name:	<input type="text"/>
Opportunity Stage:	target



Mass Convert Step 2

This screen gives you the ability to control whether contacts and opportunities will be created during the conversion process. It also gives you the ability to attempt to match lead information to existing accounts/contacts. Unless you are sure that none of these leads already exist in the database as accounts or contacts, you should leave the "Find Matching Accounts" option checked. When you click "next", you are taken to the account/contact matching screen, as shown below:

Verify Mapping of the Leads to Existing Accounts or New Accounts

Lead Info	Map to Account	Map to Contact
George Jones Company: Microsoft PO Box 101 Plano, TX 75093	<input checked="" type="radio"/> MICROSOFT <input type="radio"/> Create A New Account for this Lead <input type="radio"/> <input type="text"/> Find Account	<input checked="" type="radio"/> GEORGE A JONES <input type="radio"/> GEORGE DAVID JONES <input type="radio"/> GEORGE ELIOT JONES <input type="radio"/> GEORGE F JONES <input type="radio"/> GEORGE V JONES <input type="radio"/> Create A New Contact for this Lead <input type="radio"/> <input type="text"/> Find Contact
James Smith Company: IBM 101 First Suite 100 Dallas, TX 75001	<input checked="" type="radio"/> IBM CORP/AUSTIN <input type="radio"/> IBM CORP/DALLAS <input type="radio"/> IBM CORP/FORT WORTH <input type="radio"/> IBM CORP/GENERAL <input type="radio"/> IBM CORP/HOUSTON <input type="radio"/> IBM CORP/NEW YORK <input type="radio"/> IBM CORP/RALEIGH NC <input type="radio"/> IBM CORP/ROANOKE <input type="radio"/> IBM CORP/ROANOKE <input type="radio"/> IBM CORP/SAN JOSE <input type="radio"/> IBM GLOBAL SERVICES <input type="radio"/> Create A New Account for this Lead <input type="radio"/> <input type="text"/> Find Account	<input checked="" type="radio"/> JAMES SMITH <input type="radio"/> JAMES SMITH <input type="radio"/> JAMES SMITH <input type="radio"/> JAMES A SMITH <input type="radio"/> JAMES ALLEN SMITH <input type="radio"/> Create A New Contact for this Lead <input type="radio"/> <input type="text"/> Find Contact

[next](#)



Mass Convert Step 3

SourceTap CRM Documentation

The matching screen gives you a list of leads to be converted and gives you the option to map the lead to existing accounts/contacts in cases where there is a close name match to existing information in the database. You can choose to create new accounts/contacts for each lead, or you can link to one of the suggested matching accounts or contacts. If the matching account is not displayed and you think there might be a matching account in the database, you can click on the "Find Account" link, which will give you the ability to search through accounts to see if there is a better match, as shown below:

Verify Mapping of the Leads to Existing Accounts or New Accounts

Lead Info: George Jones Company: Microsoft
PO Box 101
Plano, TX 75093

Map to Account: MICROSOFT

Map to Contact: GEORGE A JONES

James Smith Company: IBM
101 First Suite 100
Dallas, TX 750001

localhost - Sales Force Automation - SourceTap - Microsoft Internet Explorer

Name: IBM Search

11 items found, displaying all items.

Name	Phone	Address	City	State	Zip
IBM CORP/AUSTIN	512 821 4349		AUSTIN	TX	78758
IBM CORP/DALLAS	972 402 6406	13800 DIPLOMAT DR	DALLAS	TX	75234
IBM CORP/FORT WORTH	817 870 4015	601 MAIN ST SUITE 1200	FORT WORTH	TX	76102
IBM CORP/GENERAL					
IBM CORP/HOUSTON			HOUSTON	TX	
IBM CORP/NEW YORK		OLD ORCHARD RD	ARMONK	NY	
IBM CORP/RALEIGH NC	919 301 5824	5606 SIX FORTS RD BLDG 655	RALEIGH	NC	27609
IBM CORP/ROANOKE	972 556 4333	5 W KIRKWOOD BLVD	ROANOKE	TX	76299
IBM CORP/ROANOKE	817 962 4308	5 W. KIRKWOOD BLVD	ROANOKE	TX	76299 0015
IBM CORP/SAN JOSE		555 BAILEY AVE	SAN JOSE	CA	
IBM GLOBAL SERVICES		1000 BELLEVIEW	DALLAS	TX	75215

next

Mass Convert Step 4

Similarly, you can use the "Find Contact" screen, as shown below, to determine if there are any existing contacts that match the lead being converted.

Verify Mapping of the Leads to Existing Accounts or New Accounts

The screenshot displays the SourceTap CRM interface within a Microsoft Internet Explorer browser window. The browser title is "localhost - Sales Force Automation - SourceTap - Microsoft Internet Explorer".

On the left, there is a "Lead Info" panel for "George Jones" (Company: Microsoft, PO Box 101, Plano, TX 75093) and "James Smith" (Company: IE, 101 First Suite 100, Dallas, TX 75001). A "next" button is located at the bottom of this panel.

The main area is divided into two sections: "Map to Account" and "Map to Contact".

Map to Account:

- ☒ MICROSOFT
- ☐ Create A New Account for this Lead
- Find Account

Map to Contact:

- ☒ GEORGE A JONES
- ☐ GEORGE DAVID JONES
- ☐ GEORGE ELIOT JONES

Below these sections, a search bar contains "First: James", "Last: Smith", "Company:", and "City: Dallas", with a "Search" button. Below the search bar, a message states "7 items found, displaying all items." with a "1" indicating the current page.

A table lists the search results:

First	Last	Phone	Company	Address	City	State	Zip
JAMES DAWSON	SMITH			9442 HEATHERDALE DR	DALLAS	TX	75243-6156
JAMES EDWARD	SMITH			2692 HEARTHSTONE DR	DALLAS	TX	75234-4777
JAMES FRANK	SMITH			5031 HARVEST HILL RD	DALLAS	TX	75244-6522
JAMES H	SMITH			2542 BRANDON ST	DALLAS	TX	75211
JAMES HAROLD	SMITH			2253 SUTTER ST	DALLAS	TX	75216-2618
JAMES MICHAEL	SMITH			7616 WORTHING ST	DALLAS	TX	75252-6447
JAMES OVAL	SMITH			7719 MAPLECREST DR	DALLAS	TX	75240-2818

Mass Convert Step 5

Once you are happy with the account/contact mapping options, you can click next to begin the conversion process. If the list to be converted is large, the matching may be split over multiple screens with a subset of leads listed on each page. The conversion will not begin until you have mapped thru all of the leads. If you back out of or stop the process prior to confirming all of the conversion options, the conversion can be resumed later, and you will only have to confirm the matching of leads that were not previously matched.


4.2.6. Lead Capture from Web

4.2.6.1. Lead Capture

You can use this feature to capture leads from your corporate website or any external website. The system will generate an HTML form to capture lead information that you can paste into any web page.

This option is available in the "Generate form to capture leads from your website" link from the Lead Home page, as shown below:

SourceTap CRM Documentation

**Lead Search**


Enter one or more values to search for leads.

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Company:	<input type="text"/>
Bus. Phone:	<input type="text"/>
City:	<input type="text"/>

Enter a name if you want to save the query.


Save As:	<input type="text"/>
----------	----------------------


[Advanced](#)

**Quick Create**


Add a new lead here.

Lead Type:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Title:	<input type="text"/>
Company:	<input type="text"/>
Bus. Phone:	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip:	<input type="text"/>


**LEADS HOME**

Lead List 

First Name	Last Name	Company	Title	Business Phone																						
Yum! Brands, Inc.				502-874-8300																						
a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z	*

**Lead Tools**
Use these tools to manage your leads.

- [Import Leads](#)
- [Export Leads](#)
- [Email Leads](#)
- [Mass Convert Leads to Accounts and Contacts](#)
- [Generate form to capture leads from your website](#)

**Reports**
Select a Lead report below to view that report.

- [Lead Details](#)
- [Leads by Source](#)
- [Leads by Status](#)
- [Leads by Lead Type](#)

Lead Home

The first step is to choose the fields that you would like to include in the form. This is done from the page shown below:

Choose Fields to include in Form.

Field	Label	
First	First Name	✕ +
Last	Last Name	✕ +
Company Name		✕ +
Business Phone		✕ +
Email	Email Address	✕ +
Address	Mailing Address	✕ +
City		✕ +
State		✕ +
Zip		✕ +

URL to Redirect to on Success:

URL to Redirect to on Error:

Lead Capture Setup Step 1

You can add and remove rows using the "X" and "+" buttons at the right of each row. You can also enter the pages in you website that you would like the system to redirect the user to after submission of the generated form. You can specify different pages based on whether the lead is loaded successfully or not. When you hit the "Generate HTML" button, you will be taken to the generated form page, as shown below:

copy and paste the code below into your web page

```
<form action=http://crm.sourcetap.com/sfa/control/leadCapture target=' self'
method=post>
<input type=hidden name=action value='save'>
<input type=hidden name=cid value='10101.10000'>
<input type=hidden name=uid value='10101.10001'>
<input type=hidden name=onSuccess
value='http://www.mysite.com/registration complete.html'>
<input type=hidden name=onError
value='http://www.mysite.com/registration error.html'>
<table>
<tr><td>First Name<td><input name='LeadHeader_Lead_firstName_0'
size=30></td></tr>
<tr><td>Last Name<td><input name='LeadHeader_Lead_lastName_0'
size=30></td></tr>
<tr><td>Company Name<td><input name='LeadHeader_Lead_companyName_0'
size=30></td></tr>
<tr><td>Business Phone<td><input name='LeadHeader_Lead_businessPhone_0'
size=30></td></tr>
<tr><td>Email Address<td><input name='LeadHeader_Lead_email_0'
size=30></td></tr>
```

Lead Capture Setup Step 2

You should copy the generated HTML from this page and paste it into your external web page. You can modify the look and feel of the form to meet your corporate standards, but you should be careful not to remove any of the generated form elements.

4.2.7. Mail Merge

4.2.7.1. Mail Merge

Mail merge is the process of integrating data from SourceTap CRM with document templates. This is typically done for form letters and email campaigns. You can use external tools, such as Microsoft Office, to handle mail merge or use the built in email merge capabilities.

4.2.7.2. Using External Tools for Mail Merge

The simplest way to use mail merge is to create a [report](#) and export it to CSV format. Then you can use Microsoft Word or any other tool with document merge capabilities to create a merge document. You can also use Microsoft Outlook to handle email merge. See the documentation for your word processing application for more information on merging documents with data.

4.2.7.3. Using the Built-In Email Merge Capabilities

SourceTap CRM has built-in email merge functionality. To access it, choose the "Email Lists" option from the main menu. This will give you the email list page, as shown below:

click here to create a new template'. Below this is a table of templates. The table has two columns: 'Template Name' and 'Action'. The templates listed are: 'Lead Email' (selected), 'Name and Address', 'Simple Template', 'Thank You for Attending', and 'Welcome to the Murphy Center'. Each template has 'Edit?', 'Duplicate?', and 'Delete?' links in the Action column. Below the table is a section 'Choose a List to Email To' with a dropdown menu showing '1 person list'. Below that is a text field 'Override Send To Address (you can enter an email address for testing purposes)' with the value 'test@sourcetap.com'. A 'Send' button is at the bottom."/>

Template Name	Action
<input checked="" type="radio"/> Lead Email	Edit? Duplicate? Delete?
<input type="radio"/> Name and Address	Edit? Duplicate? Delete?
<input type="radio"/> Simple Template	Edit? Duplicate? Delete?
<input type="radio"/> Thank You for Attending	Edit? Duplicate? Delete?
<input type="radio"/> Welcome to the Murphy Center	Edit? Duplicate? Delete?

Choose a List to Email To: 1 person list

Override Send To Address (you can enter an email address for testing purposes):

[Send](#)

Email Merge Main

The top portion of the screen allows you to create an email template or choose an existing template. For existing templates, you can choose to Edit, Duplicate, or Delete them. Duplicate allows you to create a new template based off of an existing template. The bottom portion of the screen allows you to choose a list of people to send the email to. This list should be either a list of Leads or a list of Contacts. For more information on lists, see [Working with Lists](#). You can also choose to override the "To" address in the template to a static address, which is useful for testing purposes. Before sending any mass mailings out, it is recommended that you test the template on a small list and that you fill in your email address in the "Override" field. Once the template has been sent to you successfully, you can then resend it to the the correct recipients by clearing the "Override" field.

The template editor is shown below:

The email template can use fields that will be filled in from data at execution time. To see the text required to insert a field into the template, choose the Template type, then click on a field in the Available fields list. The code that needs to be inserted into the list will be shown in Field Value, and you can then cut and paste it into your template.

Template Name:

From Address:

To Address:

CC Address:

BCC Address:

Subject:

Content Type:

Body:

Dear {Lead.firstName} {Lead.lastName}

Welcome to SourceTap.

Please confirm that your address is:

{Lead.mailingAddress}

{Lead.city} {Lead.state}, {Lead.zip}

Thanks,

SourceTap Administrator

save

Template Type:

Field Value:

Available Fields

- Industry
- Annual Revenue
- # Employees
- Opportunity Amount
- Opportunity Rating
- Opportunity Description
- Party ID
- Address Id
- Address Type
- Address Owner ID
- Address
- City
- State
- Zip**
- Country
- Created By (Address)
- Created Date (Address)
- Modified By (Address)
- Modified Date (Address)
- Primary

Email Templates

Email templates can be in plain text or HTML. The "To", "CC", "BCC", "Subject", and "Body" fields can contain static text and field tags that are filled in from the database at run time. The field tags can be filled in from any field in the Lead or Contact information. You should make sure that the fields tags that you enter on the template match the type of list you are sending the email too. For example, if you use information from Leads in the template but send the email to a list of Contacts, you will not get the desired result.

To simplify the creation of templates, the template editor has a list of available fields lists on the right side of the screen. You can switch the template type to Contact or Lead to get the list of fields available for that type. By clicking on an item in the "Available Fields" select list, you will see the correct template tag to be used in the "Field Value" field. You can then copy and past the value from the "Field Value" field to the desired field on the template.

4.2.7.4. Configuring the System for Mail Merge

In order to use the email merge feature, you need to set the outgoing mail (SMTP) server to be used for sending emails. This is set in the general.properties file which is located in the components/common/config directory. You should verify the settings of the following parameters in this file:

- mail.smtp.relay.host - the internet address (host name or IP address) of your outgoing (SMTP) mail server
- mail.smtp.auth.user - if your email server requires authentication, this should be the

- userid required to log into the mail server
- mail.smtp.auth.password - if your email server requires authentication, this should be the password required to log into the mail server

4.2.8. Working with Lists

4.2.8.1. Working with Lists

Lists are used to identify a subset of data for further processing. Lists can be created by saving the results of a [query](#) or by choosing to add [imported](#) data to a list. Currently, you can preform the following actions on lists:

- **Mass Lead Conversion** - see [Lead Conversion](#) for more information.
- **Mail Merge** - see [Mail Merge](#) for more information

5. Miscellaneous

5.1. Frequently Asked Questions

5.1.1. Questions

1. General

- [What is the difference between Leads and Contacts?](#)
- [Should I import contact information as Leads or Contacts?](#)

5.1.2. Answers

5.1.2.1. 1. General

1.1. What is the difference between Leads and Contacts?

Leads are typically generated from Marketing activities, such as mailing campaigns or trade shows. Initially, the information about a lead is very minimal. A lead could consist of information about a Company or a Person. Once more information is gathered about a lead, or as potential opportunities are identified for that lead, the lead can be converted to and account, contact, and opportunity.

1.2. Should I import contact information as Leads or Contacts?

Information should be initially imported as leads. Once the lead is qualified, it can be converted to a contact. The lead conversion process performs some checks to identify existing contacts which may match the lead being converted. This helps prevent you reduce

the chance of having duplicated information in the system.

6. Printable Docs