Overview

Forté CRM Database

Forté CRM works b keep ng a local database (.e. a database ph s call on our computer) n s nc w th a remote database. If the remote database s unava lable for reasons such as network down, laptop d sconnected, server unava lable, etc. then the s stem w ll cont nue to operate and w ll s nchron se an changes when the remote database becomes ava lable.

The f rst t me ou logon the s stem w ll perform an n t al s nchron sat on. Depend ng on the amount of data, th s process could take from a few m nutes to a couple of hours.

CRM Browser

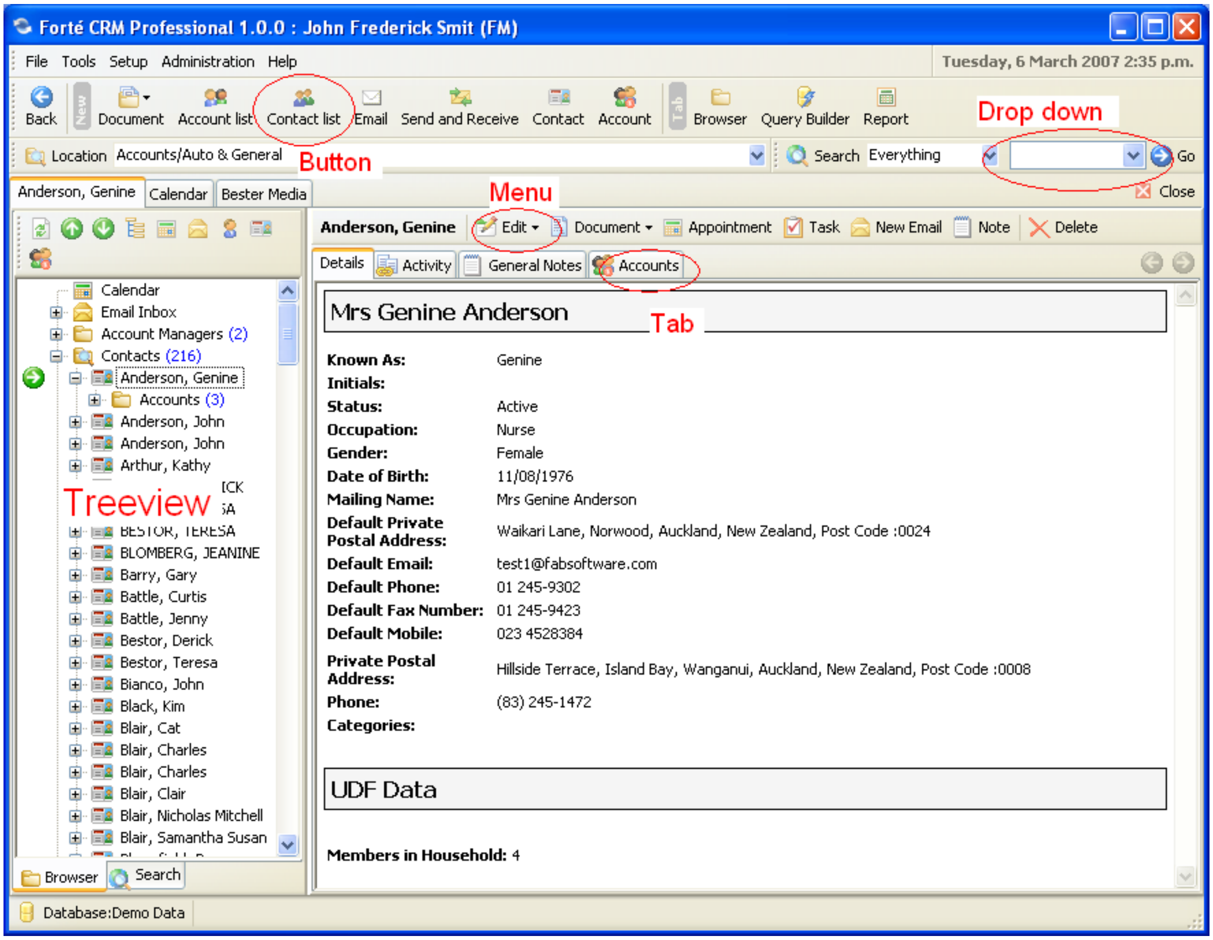
The Forté CRM s stem s based around the CRM Browser. The treev ew on the left of the screen s used to nav gate through our data. A treev ew s a wa of d spla ng h erarch cal data and cons sts of nodes. Each node generall has an con and a name. A node (group of data) can be expanded to show the next level (sub-nodes) b cl ck ng on the '+' s mbol, and contracted b cl ck ng on the '-' s mbol.

Cl ck ng on a node w ll d spla relevant nformat on n the r ght hand v ew ng pane. R ght cl ck ng on tems n the treev ew ma pop up a menu of appropr ate act ons. For example, r ght cl ck ng on a contact pops up a menu nclud ng opt ons to create an appo ntment or a document. Th s can be used as a qu ck wa to access commonl used funct ons. The treev ew d agram ma appear a l ttle daunt ng at f rst, but t's power and ease of use soon become apparent.

User Interface

Forté CRM has been des gned w th an ntu t ve user nterface. It follows standard convent ons such as r ght mouse cl ck menus, double cl ck to open or ed t tems and drag and drop operat ons.

The var ous screen components of Forté CRM are h ghl ghted on the follow ng sample screen mage.



Button Pos t on ng the cursor over the con d spla s the button outl ne.
Cl ck the button to use the features assoc ated w th t.

M nu S m lar to a button, but also ncludes a small down arrow.
Cl ck the menu to d spla   a l st of opt ons. Cl ck on the requ red
opt on.

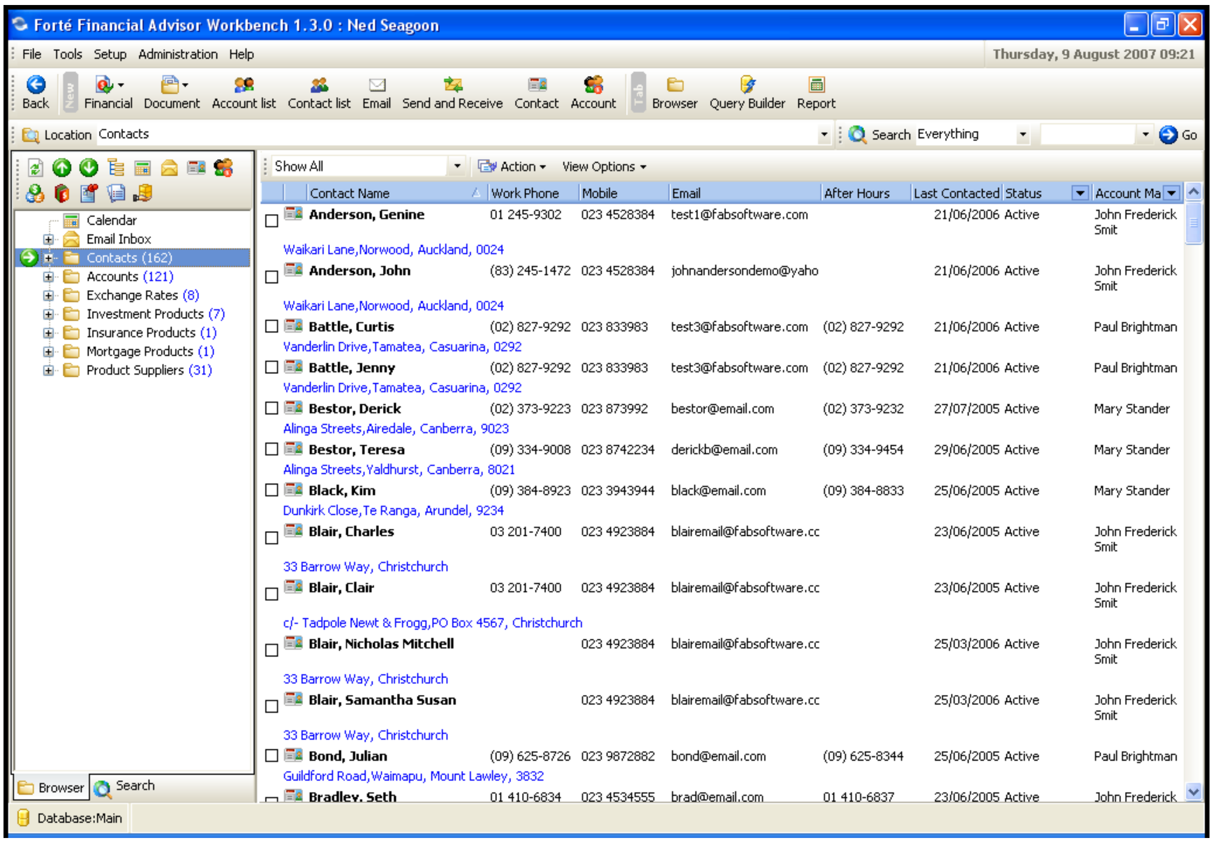
Tab Each funct on (e.g. v ew ng contact deta ls) ex sts n a tab. A feature of the s stem s that mult ple tabs can be open s multaneousl allow ng several tems to be worked on at the same t me. For example, one tab could conta n a l st of contacts, another tab could conta n a l st of accounts, and another could conta n deta ls of a contact. Tabs can also conta n var ous screens of data for one contact or account. The current tab s h ghl ghted n orange, and can be closed b   cl ck ng the Close button to the r ght of the tabs.

Dro   do   n A rectangular box, s m lar to a menu, that allows a cho ce of opt ons.
Cl ck the arrow to d spla   the ava lable opt ons.
Cl ck an opt on to select t. It w ll then be d spla ed n the box.
Some drop down boxes allow the user to t pe n the requ red deta ls f the preferred opt on s unava lable.

Tr   v A wa   of d spla   ng h erarch cal data. A group of data can be expanded to show the next level b   cl ck ng on the '+' s mbol, and contracted b   cl ck ng on the '-' s mbol.

Grid Views

Gr d v ews are nteract ve tables of nformat on. These are ma nl   used for contacts and accounts to ass st w th f lter ng and select on for ma l merges and other act ons. Gr d v ews can be sorted b   an   v s ble cr ter a.



Creating New Items

To create a new tem such as an account or a contact, cl ck the correspond ng button at the top of the screen. For other tems such as notes,   ou can generall   r ght cl ck on the element   ou w sh to create the tem for. For example, to create a new document for a contact, r ght cl ck on the contact n e ther the treev ew or the gr d and select 'Document' from the menu. Alternat vel , f the contact s selected, cl ck on the requ red button at the top of the contact's deta ls.

Shortcut Keys

Forté CRM Shortcut Keys

Ctrl + N	New ema l	
Alt + S	Send/rece ve ema l	
Ctrl + Sh ft + P	New appo ntment	
Ctrl + Sh ft + K	New task	
Ctrl + Sh ft + C	New contact	
Ctrl + Sh ft + A	New account	
Ctrl + T	Open new tab (browser)	(In development)
Ctrl-+ Tab	Change tab (browser)	(In development)
Ctrl + F	Search (open search tab)	
Ctrl + A	Search Accounts	
Ctrl + C	Search Contacts	
Ctrl + D	Search Documents	
Ctrl + Sh ft + D	Document menu	(In development)

Forté AWB Shortcut Keys

Alt + A	Asset schedule
Alt + D	D str but on
Alt + I	Investment
Alt + N	Investment product
Alt + T	Transact on
Alt + R	Regular transact on
Alt + U	Product suppl er
Alt + L	Recommended asset allocat on
Alt + B	Bulk d v dend
Alt + E	Appl model portfol o
Alt + P	Pol c
Alt + O	Pol c product
Alt + M	Mortgage
Alt + G	Mortgage product

Glossary of Terms

Account	An ent t w th whom the user has a bus ness relat onsh p. An account ma be a compan , department, portfol o or an nd v dual. A log cal group ng of contacts adm n stered b one or more account managers.
Account L st	A set of accounts that can be worked w th as a group.
Account mana r	A person who controls, or ma control, accounts and contacts.
A o ntm nt	A f xed length meet ng between two or more part es, recorded n the d ar .
Contact	A person w th whom commun cat on ma occur.
Contact l st	A set of contacts that can be worked w th as a group.
Docum nt	End-result letter, report or paper.
Docum nt t m lat	A template, or model document, used to generate a document from nformat on n the database.
Not	A record of an nteract on w th a contact or account.
P rm ss on	The author t a user has to v ew or change nformat on n the database. Perm ss ons are used to enable the shar ng of nformat on where appropr ate, and to protect the ntegr t of the database. The s stem adm n strator can set d fferent perm ss ons for var ous users.
Qu ry	An ad-hoc wa to extract nformat on from the database.
R ort	Non-ed table output document.
Task	A to-do tem, recorded n the task l st.
Us r	A person logged onto the Forté CRM s stem.
Us r Grou	Users can belong to d fferent user groups. Each group has a perm ss on level appropr ate to the tasks to be carr ed out.