

## 1 Introduction

The purpose of this Instruction Sheet is to describe the various Editions of MX-Contact so that you can select the right version for your needs.

This document should assist you in answering the following typical questions that are asked:

- *Which Edition do I choose if I just want basic Contact Management functionality?*
- *Do I need Exchange Server?*
- *Can I customise the Company, Contact (and other) forms that are supplied with MX-Contact if I purchase the SOHO (or Personal) Edition?*
- *How is MX-Contact Licensed?*
- *What happens with a User's License when that person leaves the company?*
- *Do all users need to be on the same version of Outlook?*

## 2 The Editions Available

MX-Contact is a Customer Relationship (CRM), Contact Management and Sales Force Automation package that runs inside Microsoft Outlook 2002, 2003, 2007 and 2010. The system utilises all the standard functionality of Outlook but provides many additional features that transform Outlook into a powerful CRM system.

MX-Contact has 6 different versions (Editions) available catering for a single user through to an enterprise with thousands of users, with data storage in an Outlook Data File, Exchange Server Public Folders or Microsoft SQL Server database.

The **Personal** and **Professional** Editions are designed for a single user and run off a SQL Server Express database, using an Outlook Personal Folders File (.pst) as a forms 'container'.

The **SOHO Standard** and **Advanced** Editions are designed for a team of users sharing one (or more) databases without Exchange Server. A SQL Server 2005 or 2008 Express is used for the shared database.

The **Enterprise** Edition is designed for a team of users usually using Outlook with Exchange Server (although Exchange Server is not required) sharing a SQL Server database.

The **Personal** and **SOHO Standard** Editions offer the basic contact management functionality, while the **SOHO Advanced** and **Enterprise** Editions allow one to add additional custom folders to the system and allow use of the **Sales, Marketing** and **Support** Modules.

### 2.1 The Personal Edition

The Personal Edition is designed for a single user who wants basic Contact Management functionality. It runs off a SQL Server Express database, using an Outlook Personal Folders File (.pst) as a forms 'container'.

- only supports the Base System set of folders (see below).
- utilises a SQL Server 2005 or SQL Server 2008 Express database for data storage.

- utilises an Outlook Data/Personal Folders File (.pst) as a container for the Outlook forms used by MX-Contact.

## 2.2 The SOHO Standard Edition

The SOHO Standard Edition is designed for a team of users needing basic contact management functionality but who do not have Exchange Server.

- only supports the Base System set of folders (see below).
- utilises a Microsoft SQL Server 2005 Express or SQL Server 2008 Express Edition database for data storage.
- utilises an Outlook Data/Personal Folders File (.pst) as a container for the Outlook forms for customers not using Exchange Server, or a set of Public Folders with Exchange.

## 2.3 The SOHO Advanced Edition

The SOHO Advanced Edition is designed for a team of users needing advanced CRM functionality or unrestricted customisability sharing a common database without Exchange Server.

- utilises a Microsoft SQL Server 2005 Express or SQL Server 2008 Express Edition database for data storage.
- utilises an Outlook Data/Personal Folders File (.pst) as a container for the Outlook forms for customers not using Exchange Server, or a set of Public Folders with Exchange.
- allows for the addition of an unlimited number of user-defined folders.
- allows the addition of the Sales, Marketing and Support Modules.

Note: The SOHO Advanced Edition can also be used by clients who **do** have Exchange Server but prefer the additional features that a SQL Server database offers over Public Folders as a data store.

For more information on the Microsoft SQL Server 2005 Express Edition, please refer to the following links:

[Microsoft SQL Server 2005 Express Edition Home Page](#) - Microsoft

[Microsoft SQL Server Express 2005](#) - Don Schlichting

## 2.4 The Enterprise SBS Edition

The Enterprise SBS Edition is designed for a team of users in a Windows Small Business Server (SBS) environment.

- utilises a Microsoft SQL Server database bundled with Windows SBS Premium Edition.

- utilises a set of Microsoft Exchange Public Folders as a container for the Outlook forms for customers using Exchange Server, or an Outlook Data/Personal Folders File (.pst) for customers not using Exchange.
- allows for the addition of an unlimited number of user-defined folders.
- allows the addition of the Sales, Marketing and Support Modules.

## 2.5 The Enterprise Edition

The Enterprise Edition is designed for a team of users sharing a Microsoft SQL Server database.

- utilises a Microsoft SQL Server Workgroup, Standard or Enterprise Edition database for data storage.
- utilises a set of Microsoft Exchange Public Folders as a container for the Outlook forms for customers using Exchange Server, or an Outlook Data/Personal Folders File (.pst) for customers not using Exchange.
- allows for the addition of an unlimited number of user-defined folders.
- allows the addition of the Sales, Marketing and Support Modules.

## 3 The Base System Folders/Functionality

The following folders are part of the **Base System** of MX-Contact:

- **Companies:** This folder contains details of the various companies or organisations that you deal with. These are usually existing or prospective customers but may also be suppliers, partners, etc.
  - **Attributes:** A list of attributes that have been linked to companies in your database.
  - **Products:** A list of products that have been linked to companies in your database.
- **Contacts:** This folder is a listing of all the contacts that one deals with, both individuals and company contacts. All the standard demographic and personal information can be maintained per contact.
  - **Attributes:** A list of attributes that have been linked to contacts in your database
  - **Products:** A list of products that have been linked to contacts in your database
- **Groups:** This folder allows you to link groups of companies or contacts together. A Company Group for example would be a collection of companies all belonging to the same Holding/Parent Company. A Contact Group is a collection of contacts linked by some common bond, such as a family unit, a committee, board of directors, etc.
- **Associations** (The Associations Folders are used to create and maintain relationships between the various entities i.e. companies, contacts, users. For example you can link any number of contacts to a company but at the same time link one particular contact to multiple companies, designating which role that individual performs for each company. Associations facilitate many-to-many relationships in this manner.

- **Companies to Companies:** Link companies to other associated companies.
  - **Companies to Contacts:** Link companies to associated contacts.
  - **Companies to Teams:** Link companies to associated teams.
  - **Companies to Users:** Link companies to associated users.
  - **Contacts to Contacts:** Link contacts to other associated contacts.
  - **Contacts to Teams:** Link contacts to associated teams.
  - **Contacts to Users:** Link contacts to associated users.
  - **Groups to Companies:** Link groups to companies.
  - **Groups to Contacts:** Link groups to contacts.
  - **Teams to Teams:** Link teams to other associated teams.
  - **Teams to Users:** Link teams to associated users.
- **Calendar** (Users schedule Meetings and Appointments in their personal Calendar but have the additional facility to link an appointment to a Company, Contact, etc. Linked appointments are copied to the MX-Contact Public Folders so that anyone in the organisation can see who has scheduled activities with various clients.)
  - **Tasks** (Users utilise their Outlook Tasks to manage not only personal to-do's but also tasks that reflect actions that need to be taken for a particular company or contact. These tasks are still stored in the responsible user's Personal Tasks folder but a copy is maintained in the MX-Contact folders so that Account Managers can monitor who is doing what for each client.)
  - **Journals** (Journal Entries record details of events and activities that have taken place with a particular Company or Contact. They can also be linked to any other relevant item (opportunities, Events, etc.)
  - **Documents** (Any kind of document (Word, Excel, pdf, jpg, etc.) can be linked to a Company, Contact, Opportunity, etc. so that anyone can track the correspondence relating to a customer/supplier.)
  - **Email** (All e-mail sent and received can be automatically linked to a Company and/or Contact and copied to the MX-Contact Public Folders. Thus all relevant, and non-confidential incoming and outgoing e-mail correspondence can be made visible to the organisation as a whole.)
  - **Reports** (Several Crystal reports are available to display your information in a variety of ways. Furthermore reports exist to export the data to Excel where you can create your own Charts, Pivot Tables and the like.)
  - **System**
    - **Attributes** (Attributes are User-defined characteristics that can be set up without the need for form customisation. They effectively allow an unlimited number of User-defined fields. They are also useful for recording any characteristic where

the User must be able to select more than one option for a particular list, and where more detailed explanations on a particular choice might be necessary.)

- **Field Changes** (List of items that reflect each change that is made to any item in MX-Contact.)
- **Users** (Users are those members of your organisation that are responsible for dealing with clients/ prospects/ suppliers in one way or another.)
- **Teams** (Teams are groups of users.)
- **Parameters** (The Parameters Folder is where various pre-defined settings used by the system are stored.)
- **Products** (The Products Folder stores details of the products/services that the company sells. This folder is like the price list file for the company from which quotes and orders can be generated.)
- **Picklists** (The Picklists Folder stores details of the various Picklists used in the MX-Contact Forms. A Picklist is a list of options that the User is given to choose from in order to select information for a specific field.)
- **Report Definitions** (List of files that contain the structure of each folder that are used for reporting purposes.)
- **Templates** (Templates are created from files that are generated on a regular basis in your organisation. These may include fax cover sheets, proposals, spreadsheets or typical letters.)

## 4 The Modules

Below is a listing of the folders that comprise each of the Modules that give MX-Contact its CRM capabilities (as opposed to the basic Contact Management Functionality).

### 4.1 The Sales Module

- Opportunities (with sub-folders)
- Projects
- Orders (with Line Item Details)
- Sales Plans

### 4.2 The Marketing Module

- Events (with sub-folders)
- Campaigns (with sub-folders)
- Surveys

### 4.3 The Support Module

- Incidents (with sub-folders)
- Issues
- Registered Products (with Components)
- Contracts

## 5 Licensing

### 5.1 Licensing Model

MX-Contact is licensed on a per user basis. Each license is a “Named” user rather than a concurrent user license. For the Personal and Professional Editions, the license is based on a User’s Outlook E-Mail address. A License Key is generated for each user based on:

- their e-mail address,
- the Edition used,
- the Modules required by that User, and
- the expiry date set for that license (in the case of rental or evaluation).

For multi-user systems, MX-Contact is licensed on a “domain” basis. One license key is generated for the domain, e.g. for the 3 users [tom.watson@greatlakes.com](mailto:tom.watson@greatlakes.com), [jack.daniels@greatlakes.com](mailto:jack.daniels@greatlakes.com) and [johnny.walker@greatlakes.com](mailto:johnny.walker@greatlakes.com) only one license key for the domain greatlakes.com is generated. The license key incorporates the following:

- the mail server name,
- the number of users
- the Edition used,
- the Modules required by the company, and
- the expiry date set for that license (in the case of rental or evaluation).

Note therefore that all users need to be licensed for not only the same Edition, but also have the same modules allocated, i.e. there cannot be a mix of some users with Sales Module Licenses only and others with the Support Module. If Sales and Support functionality is required all users must have both modules.

Although each user has the same license key, the License Model is still effectively “Named User” licensing (as opposed to “Concurrent User” licensing), because if a user logs in at any time he will be allocated a license count, but that license count is **not** reduced when he (or she) logs out of Outlook/MX-Contact.

When a user leaves the company, all that needs to be done is either a) delete the user record, which frees up the license for the next user, or b) remove the license key from that user’s record. The advantage of the latter approach is that the historical transactions for that user (journals etc.) would still be linked to that user. However the user could no

longer log on and be validated as a licensee (which would not be a problem if he or she has left the company).

## 6 System Requirements

The following are the system requirements for MX-Contact on both client and server. Note that not all users have to be using the same version of Outlook.

### 6.1 Personal and Professional Editions

#### 6.1.1 Client

- Windows XP Service Pack 1 or later
- Windows Vista
- Windows 7
- Outlook 2002 Service Pack 3
- Outlook 2003 Service Pack 1 or later
- Outlook 2007
- Outlook 2010
- Internet Explorer 6 or later
- 512 MByte RAM
- Microsoft SQL Server 2005 Express (bundled with MX-Contact), or
- Microsoft SQL Server 2008 Express (bundled with MX-Contact)

### 6.2 SOHO Editions

#### 6.2.1 Client

- Windows XP Service Pack 1 or later
- Windows Vista
- Windows 7
- Outlook 2002 Service Pack 3
- Outlook 2003 Service Pack 1 or later
- Outlook 2007
- Outlook 2010
- Internet Explorer 6 or later
- 256 MByte RAM

### 6.2.2 Database (SQL) Server

- Windows XP Service Pack 2
- Windows 2003 Server, or
- Windows 2008 Server
- Microsoft SQL Server 2005 Express, or
- Microsoft SQL Server 2008 Express
- 1 GByte RAM for host machine with 2 or more users.

## 6.3 Enterprise SBS Edition

### 6.3.1 Client

- Windows XP Service Pack 1 or later
- Windows Vista
- Windows 7
- Outlook 2002 Service Pack 3
- Outlook 2003 Service Pack 1 or later
- Outlook 2007
- Outlook 2010
- Internet Explorer 6 or later
- 256 MByte RAM

Note that the Enterprise SBS Edition **does not support Outlook 2000** Clients.

### 6.3.2 Exchange Server

- Microsoft Exchange Server 2003 bundled with SBS
- Microsoft Exchange Server 2007 bundled with SBS
- Microsoft Exchange Server 2010 bundled with SBS
- Minimum 2 GByte RAM

### 6.3.3 Database (SQL) Server

- Windows SBS Server Premium Edition

## 6.4 Enterprise Edition

### 6.4.1 Client

- Windows XP Service Pack 1 or later
- Windows Vista
- Windows 7
- Outlook 2002 Service Pack 3
- Outlook 2003 Service Pack 1 or later
- Outlook 2007
- Outlook 2010
- Internet Explorer 6 or later
- 256 MByte RAM

Note that the Enterprise Edition **does not support Outlook 2000** Clients.

### 6.4.2 Exchange Server (not required but if used)

- Microsoft Exchange Server 2003
- Microsoft Exchange Server 2007
- Microsoft Exchange Server 2010
- Minimum 2 GByte RAM

### 6.4.3 Database (SQL) Server

- Windows 2003 Server, or
- Windows 2008 Server, or
- Microsoft SQL Server 2005, or
- Microsoft SQL Server 2008
- Workgroup, Standard or Enterprise Editions
- Minimum 2 GByte RAM