FRANK CRM

ENGLISH MANUAL

Product details

FM Starter 2 Manual

FRANK CRM Manual, English, manual version 1.2 (matches software version)

FRANK CRM is a simple, yet versatile CRM solution, based on FileMaker Pro.
This is the end user manual and describes how to use the functionality as implemented.
This is a product by Kursiv Software, Switzerland.

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Learn more
fmstarter.com

Contact Kursiv
https://kursiv-software.com/en/contact-2/

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Introduction

An introduction to FRANK CRM. Learn about the concepts behind FRANK CRM and which versions there are.

What is FRANK CRM?

Basic functionality

FRANK CRM is a CRM solution reduced to the max. It is a tool to manage your **business contacts** and to create **sales documents** (offers, delivery notes, invoices, etc.). Those two things are basic to almost any business and for many small companies, it's enough to run the basics of a business. While its focus is solely on addresses, contacts and sales, it comes with many pro-features right out of the box, like reports on turnover, managing expiry dates of products and services and many more things.

Powerful features

What makes FRANK CRM special among the hundreds of solutions available?

- Based on FileMaker Pro (Low-code development)
- Almost anything has been made configurable through simple interfaces
- multilingual (translations possible with deepl.com)
- multi-currency (conversions enabled with freecurrencyapi.com)
- works for different document sizes (A4, Letter)
- well-implemented workflows for a variety of tasks
- free version (limited) and full version (unlimited, adaptable).

If you are a small business in which you **sell goods or services, even subscriptions,** this solution will probably solve all your administrative needs. If your requirements exceed the basic functionality, you can upgrade to the full version and use this as a starting point for your development with FileMaker Pro.

FRANK CRM solves many needs for smaller companies instantly, even in the free version, but is a great starting point for FileMaker developers as well, who want to create their own business logic or who want a **head-on start for a new project and save probably months of development time.**

Why not use free alternatives?

You might be aware that there are free CRM solutions based on FileMaker. These are great products, often featuring many more options, as FRANK CRM does. Why not opt for those free versions?

What about free CRM solutions?

There are several reasons, why we think there is a market for FRANK CRM and the benefits of FRANK CRM exceed those of more complete free versions. The reason for that is self-explanatory: Each business is different. The more details you add to a software solution, however advanced, the more functions need to be simplified, adapted or enhanced. Free packages are great, but need substantial work to make it fit for your business. That's where it gets tricky.

Free CRM solutions might be focussed on a specific country, on a single language or currency, and do not have any implementations for a more international approach. That is: These products fit well into specific markets, yet do not work that well outside those markets. If such a solution ticks all boxes for you, go for it!

As we looked into several available solutions, we found some limitations as well. Free is not always best. To go cheap might be the most expensive option over time. Here are some thoughts.

How free offerings work

First, there is no such a thing as a free lunch. The companies providing free CRM solutions live from the requests of clients to enhance and adapt that free version. It's a way to attract new clients. The free version is a way of marketing and paying clients also cover the free version. Fair enough! But for you, as a client, free is most likely not so cheap. You have to invest time, and probably money, to adapt the basic solution to your needs.

Adaption also includes removing parts you don't need, upgrading basic functionalities to enable a more versatile approach. Either by taking up the task yourself and investing time and effort to learn how it works, then adapt it to your needs. Or else you decide to let that company handle your requests, resulting in even more effort and costs.

A more complete solution seems to be offering more. You might think it's a quick and cost-effective way. However, if you consider that you most likely need to enhance it anyway, that you have to overcome implemented work-flows, complexities and development styles to make it match your require-ments. That is all rather demanding.

Thus, free versions are great, if you can use them right away, without much enhancements. Any changes you want will probably require substantial investments in time, money, or both.

FRANK CRM has a different approach

FRANK CRM is not free, as we do not intend to get work from you. It is not our development for you that pays the bills. Our earnings come directly from the sales of this product. **This product should help you solve issues, not help us to get more work.** That's a different approach.

Two key factors make FRANK CRM a perfect choice for further development:

1. Based on FM Starter

FM Starter is a starter file for new FileMaker projects as available on our website fmstarter.com. It comes with a ton of features of a general nature, like a dynamic navigation, multilingual text labels and many more things. FRANK CRM is not just about "a solution", but it is more of a development platform with many generic approaches, which are easy to understand and simple to use for your further development.

2. Reduced to the max

FRANK CRM is built on top of FM Starter. It has tons of options, but does not try the "all-that-can-be"-solution. Less is frequently more. FRANK CRM has a clear focus on *"not doing everything".* You heard that right: This solution is not about "everything", as "everything" looks different for each company. However, there are some basics, which are used in almost any scenario. FRANK CRM focusses on those basics.

FRANK CRM is focussed on Addresses, Contacts and Sales. It comes with all the basic tables, relationships, functions and settings related to these core functions. If you need an extra field, it is easy to implement. If you want to enhance, you do not have to deal with already implemented complex scenarios, which do not quite fit your business. Instead, you have a blank slate of an advanced kind, ready to help you with a sound project structure, simple approaches, generic tools and a top-notch structural approach. That makes it much easier to create exactly what you want in just a fraction of the time, while you don't have to deal so much with software parts you don't need. We think it's awesome.

3. Favor configurable options above hard-coded scripting

If a CRM does what you want might just depend on a few options, which are or aren't available in your solution. That is the reason to make FRANK CRM as flexible as possible and make options available for configuration. "It is easier to configure settings as to develop from scratch."

If there are potentially different options, these options are outsourced to simple settings and value lists. All these settings and value lists are accessible through regular layouts - no scripting needed. If you can edit a list or switch some settings and save these, you might well be able to configure the solution to fit your needs immediately, by switching some basic settings and editing a few value lists. Does that sound simplified?

Part of the settings can be found in the settings for the **Administrator,** available also in the free version. Many more settings need some careful considerations and are available in the **Developer Dashboard** only. The latter is accessible in any purchased and full license.

FRANK CRM saves you probably more than a year of work

Using FRANK CRM as a starting point for development saves you months of work, with an insight in years of experience in development and sales requirements.

As it is a product, it went through many iterations before it even was launched and will go through further refinements over time. You get a solid base for your development. It's a jumpstart for any FileMaker developer.

Requirements

You need a full and current version of FileMaker Pro

FRANK CRM is based on FileMaker Pro and needs a full license of FileMaker Pro to use it. FRANK CRM will run on any platform FileMaker Pro is running on. It has been designed for use on desktop computers, as is usually the case for CRM solutions. The full version will allow to adjusting layouts for other purposes as well.

Reasons to use FRANK CRM

Why should you invest in a proper FileMaker license and a full version of FRANK CRM? Here are some reasons.

- You stay independent of cloud platforms (though there are hosting options in the Cloud).
- You don't have your data saved in the same databases as other companies
- You can host your own database in-house
- You can develop according to your preferences
- FileMaker is a low code but advanced developing platform. Low code means fast development.
- You can define the languages you want to use
- You can add multiple accounts and create the access rights you need
- It is a one-time investment without further obligations
- All data is yours and can be exported at any time
- FRANK CRM is based on FM Starter, a unique starter solution for FileMaker developers. Thus, it is more as "just" a solution. It's the basis for advanced development.
- It's easy to use, yet powerful and versatile
- Furthermore, it's adaptable and easy to configure.

Where to get FileMaker?

Get your copy directly at the Claris website (claris.com) or with any Claris Business partner or selected resellers.

Versions and limitations

The basis

FRANK CRM is both a simple solution for small companies and a starting point for further development. It is based on FM Starter (fmstarter.com), a start file for new FileMaker projects, and uses all its benefits. FRANK CRM enhances its functionality with all the basics for registering clients and creating invoices.

The versions

There are 3 versions

1. Free version
2. Full version for 1 company
3. Resale version (build your solution, which includes FRANK CRM, for resale)

Here is a direct comparison of available versions and what you can do with each version. The free version might fit many smaller businesses. If you have a larger business or want to develop yourself, the upgrade to a full version is simple. All data from the free version can be imported with a few clicks.

Versions and options	Free	Standard	Resale
User accounts	1	unlimited	unlimited
Addresses	20	unlimited	unlimited
Developer access	no	yes	yes
Developer interface	no	yes	yes
Languages	fix	manageable	manageable
Print layouts	fix	manageable	manageable
Layout access	no	yes	yes
Script access	no	yes	yes

Import from FRANK CRM	yes	yes	yes
Import from other files	no	yes	yes
Export data	CSV	all options	all options
Swiss QR bill	yes	yes	yes
Can I resell this "as-is"?	no	no	no
Can I use FRANK CRM as a starting point for my development and then sell my solution?	no	no	yes

What does this mean?

- The Free version is good to test the solution from a user perspective
- The Free version is good for a 1-person company and up to 19 clients (20 addresses in total)
- The Free version is good as a start. It can be upgraded later.
- The Free version is intended for use on a desktop computer
- You need a Standard version if you want to take development into your own hands
- You need a Standard version, if you wish to create multiple accounts for users of the solution
- You need a Standard version, if you aim to use more than 20 addresses.
- You need a Standard version, if you intend to host the file
- You need a Standard version, if you would like to adapt screens for mobile usage
- You need a Standard version, to get access to a number of preferences, like: Choosing or creating new languages, editing certain value lists, get access to scripts and layouts
- All licenses are personal.
- A Standard version is valid for a single company (1 endcustomer)

- If you intend to resell your solution which includes FRANK CRM, you need to consider the following:

You took FRANK CRM and used it as a starting point for developing your own solution, which you intend to sell or use for multiple clients. What license do you need?

- Purchase a Standard version for each client, or
- Purchase a Resale license to include FRANK CRM in an unlimited number of copies of your own solution.

Questions? Please contact Kursiv for any further inquiries.

Getting started

Your first steps. This chapter gets you going.

Installation

Download and install

Every beginning is easy: Download your version and open the file. You need a full version or test version of FileMaker Pro to open the file (see: Requirements). There is no specific installation of FRANK CRM needed. Just move the file to any folder on your hard disc which seems good to you.

- When you **download** FRANK CRM, you receive a folder with the FRANK CRM file and some additional information, depending on the version you downloaded. Move this entire folder from your download folder to some other place on your hard disc.
- The FRANK CRM file **requires a full version of FileMaker to run.** If you do not have a full version yet, you can download a test version of FileMaker from claris.com and test FRANK CRM with that test version of FileMaker Pro (see: Requirements).
- Open the FRANK CRM file with FileMaker Pro. You will need to enter name and password. **Access details** are to be found in your downloaded archive. Check the ReadMe.txt file.

Free version and Full version

The free version and the full version work the same, but there are some differences.

- In the free version, all developer access has been removed. You can only enter this file as an end user and will not be able to change the basic set-up of the file.
    - Download FRANK CRM from fmstarter.com > Free

- The full version is a different file. It has complete developer access. The full version is only available in a valid completed purchase at our website, fmstarter.com.
    - Download the full version after purchase directly from your account at fmstarter.com.

Remove test version settings

Upgrade to a purchased full version

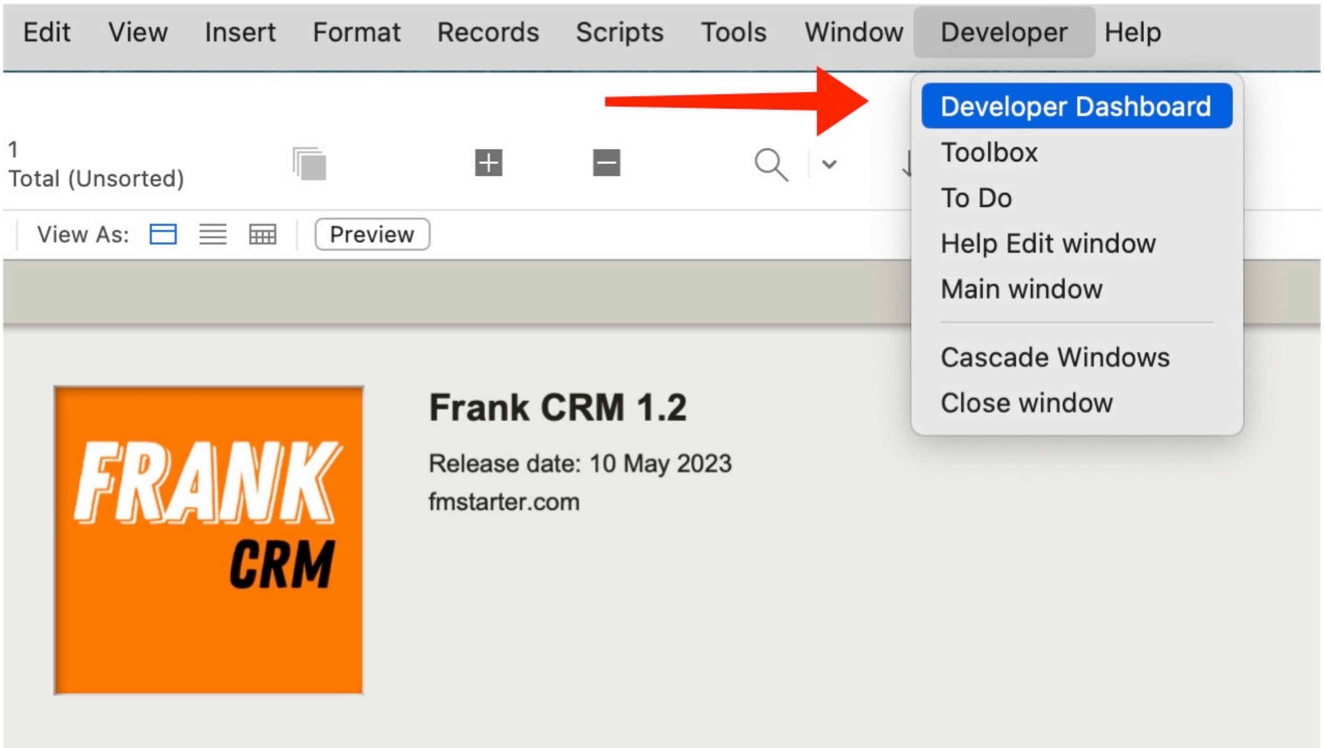
The free test version comes with some limits. After you purchased a full version, you got a different file, but with the same restrictions as the test version.

How to remove the test version settings

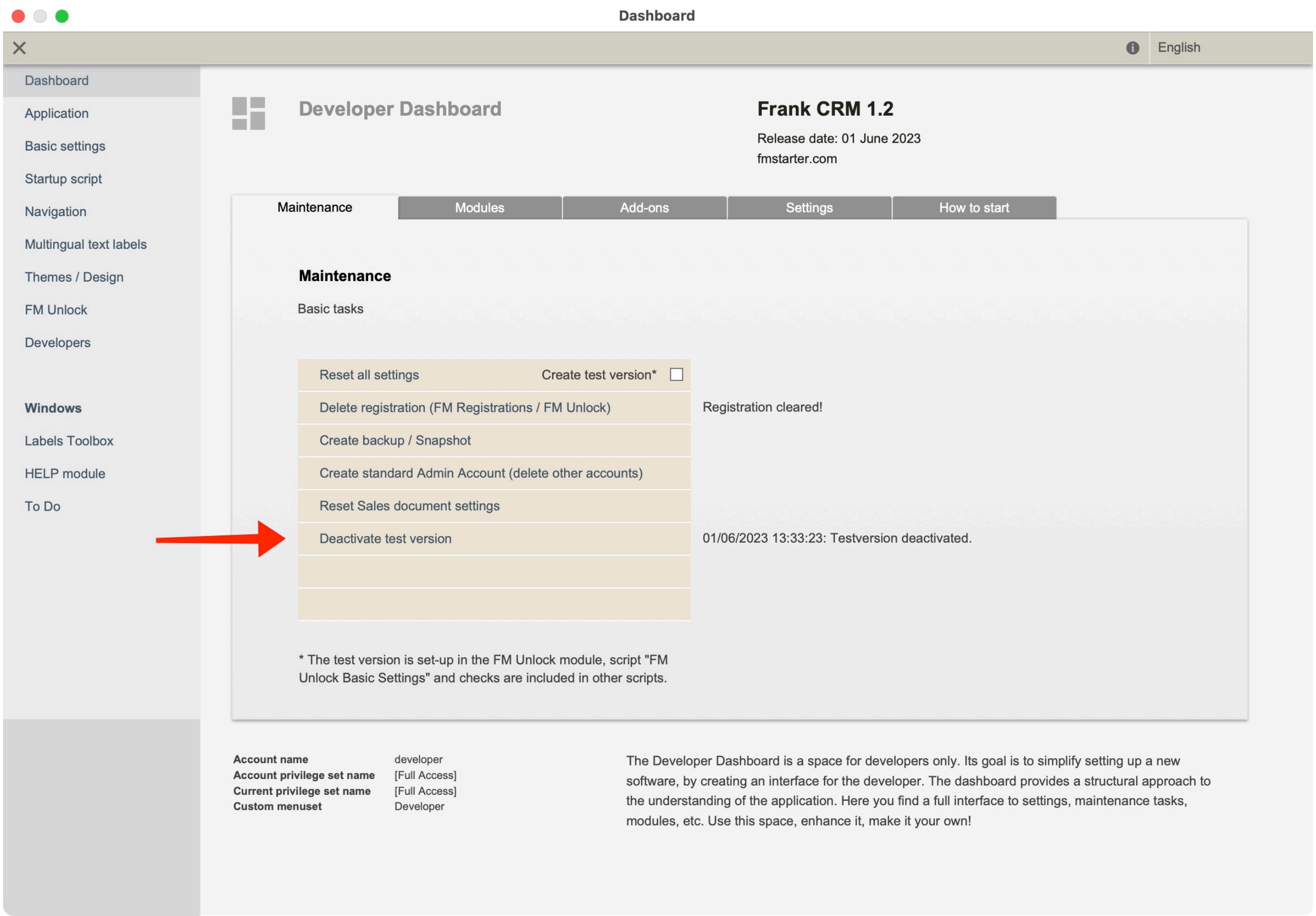
Follow these simple steps:

1. Open the purchased version of FrankCRM as a developer on a desktop computer. Instructions on how to open the file as a developer (with full access) can be found in the ReadMe.txt of your download.

2. Once you open the file with developer access, you will see a dropdown menu "Developer" appear. Click on it and select "Developer Dashboard".



3. The Developer Dashboard has tons of configuration options for developers. On the first layout, you will see some maintenance scripts, like this:



Look for the option "Deactivate test version". Click! Thiss will deactivate the test version.

That's all! Now make a backup copy of that current state by clicking on "Create backup / Snapshot" to create a first copy of your file. Note: This can only be done if you open the file locally, not if you have the file on a FileMaker Server.

Import data from test version

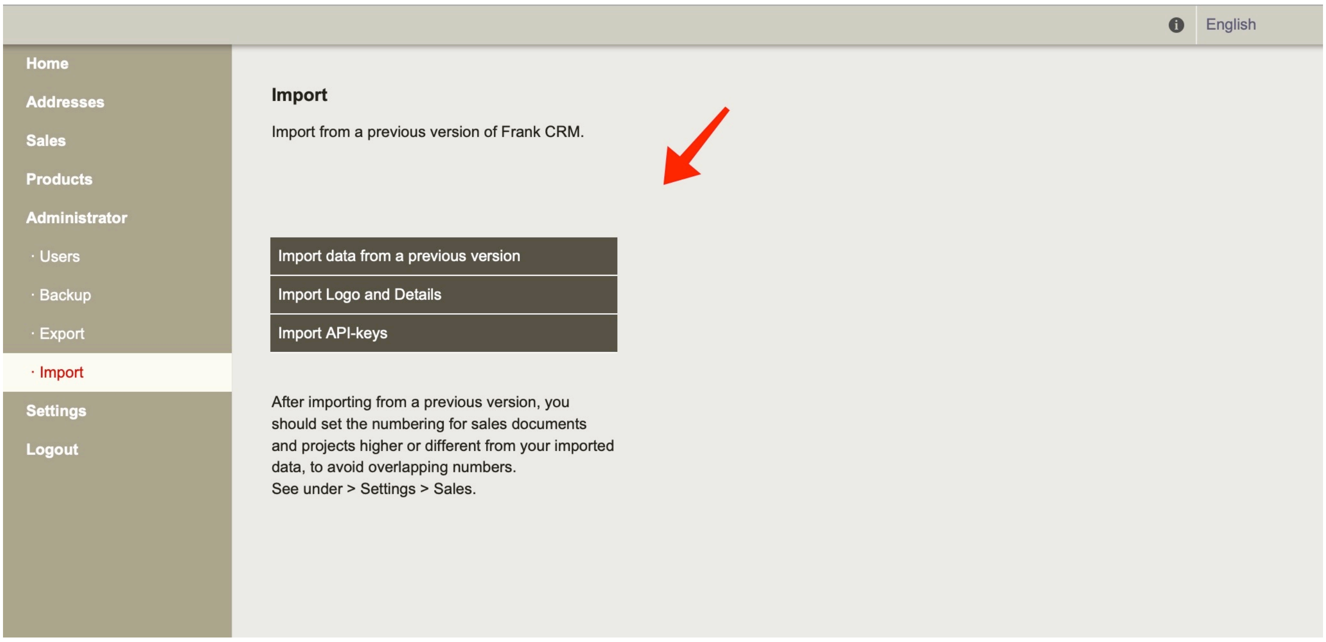
Import data from a previous version

If you started to use the test version, but later upgraded to the full version, you can easily import the data of the test version. If you continue to use a free version, you can download the latest version, and use this to import from your previous free version to a new free version. We think that's helpful.

Prepare, by closing all FileMaker files first, then open the full version you purchased. Know where your free test version with your current data is.

Then do this:

1. In the main window, click on "Administrator" in the left navigation , then "Import". This layout has the scripts to import your data.



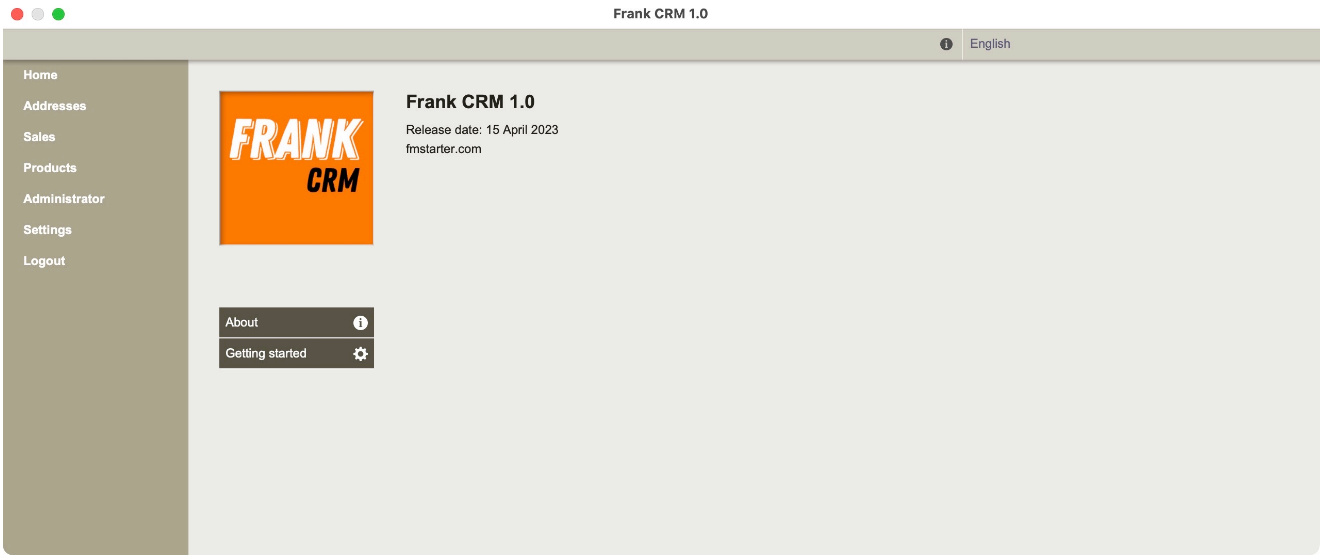
2. There are 3 buttons for the tasks "Import data", "Import Logo and Details" and "Import API-keys". The first script is important to import all your data, like addresses and sales documents. The second and third option import data you might or might not have added. It doesn't hurt to import the data if you're unsure.

After taking these 3 steps, you have imported all the data from a previous version of FRANK CRM and you are ready to start with your full version. Please check if everything is OK. Then restart your file.

See also "Import and Update".

First steps

Once you open FRANK CRM, it looks like this:



Home page

Your landing page or home page is an empty page. There is some information, but there is no data displayed. In a full version, you could make this your User Dashboard.

What do you see?

On the left side you find a navigation. The main part of the screen has the logo, some information and a few buttons ("About" and "Getting started"). At the top you have a long horizontal bar, on which only two buttons are visible ("i" for information, and a language switch).

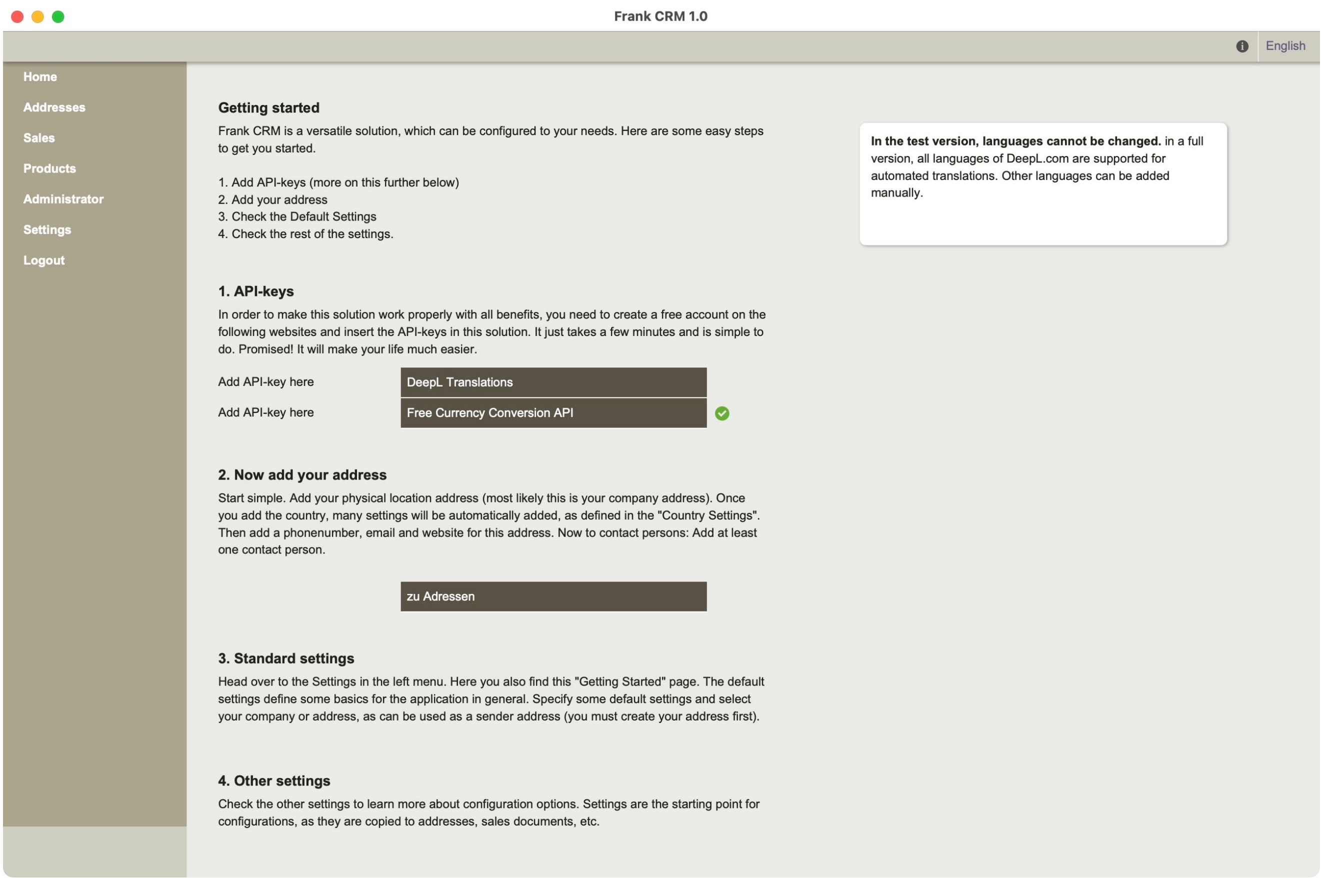
Where to click first?

- Use the **language switch,** to switch to your preferred language.
- Click the **Information button** to read about this first page
- Click on the **About** button to learn about the current version number and license

- Click on **Getting Started** to see what you need to do to get a quick start.

Getting Started

The page called "Getting Started" has a few first steps listed, which make it easy to start.



1. API-keys

FRANK CRM uses several automations which rely on external websites, specifically: automated translations and currency conversions. For each of the functions listed on this page, follow the link, create a free account and add the API key from each website.

To obtain an API-key, you are obliged to create a free account, which only takes a few minutes. If you prefer not to do this, you have no option to automatically translate, nor to get the latest currency rates. Create an account on each website. Then copy the API-key from your account on each website to the settings in FRANK CRM and save that information. After this, you will have automated translations and free currency conversions.

2. Address

FRANK CRM comes "empty". To see how it works, you need to add some data. Learning by doing, so to say. Start by going to "Addresses" and add your address first. This will usually be your company address, from which you will send invoices and the like. Other addresses will be clients or other contacts.

1. Switch to the Address layout
2. Click on "+" to add a new address
3. Add the information (click "Tab" to jump to next fields, or Shift+Tab to jump back to previous fields)
4. Add central data for the address (communication links)
5. Add people and personal data (contacts)
6. You do not need to save records. FileMaker saves records automatically when you leave a field.

3. Standard settings

Once you added your address, head over to Settings > Standard Settings in the menu at your left. These are some basic settings for your application. You might want to activate your address, which you added just before, as the "Sender Address" for any future invoices.

4. Other settings

Now explore the other settings, to get an understanding of what you can manage here. You possibly should not start to change these settings immediately, but first use them as they are.

Congratulations! You started to use FRANK CRM.

Find help

Find help

There are several ways to learn about FRANK CRM:

1. This manual
2. The website fmstarter.com with videos and posts
3. Help function within this application.

This manual will give some hints, but it is not an extended manual, in which each step is explained. Almost any page though has an online help, indicated by an (i) icon in the top bar. The help text shows when clicking on the infor-matin symbol. The explanation appears in the active interface language.

Also check out the videos about FRANK CRM on fmstarter.com. Videos give an easy-to-understand introduction to the most important workflows.

If you cannot find the answers you are looking for, please drop us a line at support@kursiv.com.

Concepts

Concepts

To find your way around, it's helpful to get acquainted with some of its basic principles. Let me be your guide.

Understanding settings

Settings are the heart beat of the application

FRANK CRM has been built with a focus on simple configurations. While it is true that every business has its own approach and needs, many of these needs are simple preferences (like: languages) or local adjustments (like: VAT calculations, currencies, paper formats). FRANK CRM makes it easy to change those preferences.

Settings for administrators

Settings in FRANK CRM are available on several levels. Most settings are managed through their own tables and value lists. The administrator has access to the "Settings" in the menu. These settings are used in other parts of the solution, specifically when creating new addresses, documents or products.

Settings for developers

Many more settings are available in the full version of FRANK CRM and reserved for the developer. You might think of managing languages, the navigation, or settings which rely on further development.

How settings are used

Settings are the heart beat of the application. Take a close look at the settings before you start using the application. Settings will be used for new addresses and sales documents. In a simplified way, **settings are copied** like this:

- Settings > Addresses > Sales documents

For example: In the Settings menu, you will find an entry called "Country Settings". In this table, you can define many preferences, like the main language for a specific country, the VAT that applies, the paper format that is used and many more things.

Country Settings

Total: 249 Countries

Code	Country Name	Language	VAT options	VAT	Currency	ZIP/City Formatting	Paper size	Print options sales
BY	Belarus	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
BZ	Belize	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CA	Canada	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	2 Letter-size portrait mode	3 Letter-size layout: Generic
CC	Cocos (Keeling) Islands	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CD	Congo, Democratic Republic of the	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CF	Central African Republic	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CG	Congo	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CH	Switzerland	German	1 Swiss VAT standard (7.7%)	7.7	CHF	1 ZIP City	1 A4-size portrait mode	2 A4-Layout: Swiss QR Bill Enhanced
CI	Côte d'Ivoire	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CK	Cook Islands	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CL	Chile	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	2 Letter-size portrait mode	3 Letter-size layout: Generic
CM	Cameroon	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CN	China	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CO	Colombia	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	2 Letter-size portrait mode	3 Letter-size layout: Generic
CR	Costa Rica	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	2 Letter-size portrait mode	3 Letter-size layout: Generic
CU	Cuba	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic

When you create a new address and enter the country for that address, the basic settings from that selected country are copied to the address. Once the settings are copied to the address, you can adjust the settings for that specific address (like: change the VAT handling or language, if you need to make an exception to the rule). It is simple for all standard settings, and exceptions can be handled easily. It works like magic - every time.

When creating a sales document from that address, the settings are once again copied, now from the address to the sales document. This means, that if the language for a specific customer is set to "French" and their currency is in "Euros", their sales documents automatically will also be in French and pricing will be in Euros. However, you can change any setting of that document by using the same value lists right in each document. Maximum easy-of-use and flexibility is guaranteed.

Settings are here to make your life easier. Basic settings will cover many issues right out of the box. They are easy to understand and simple to adjust to your needs.

Addresses or Contacts?

What is an address, what is a contact?

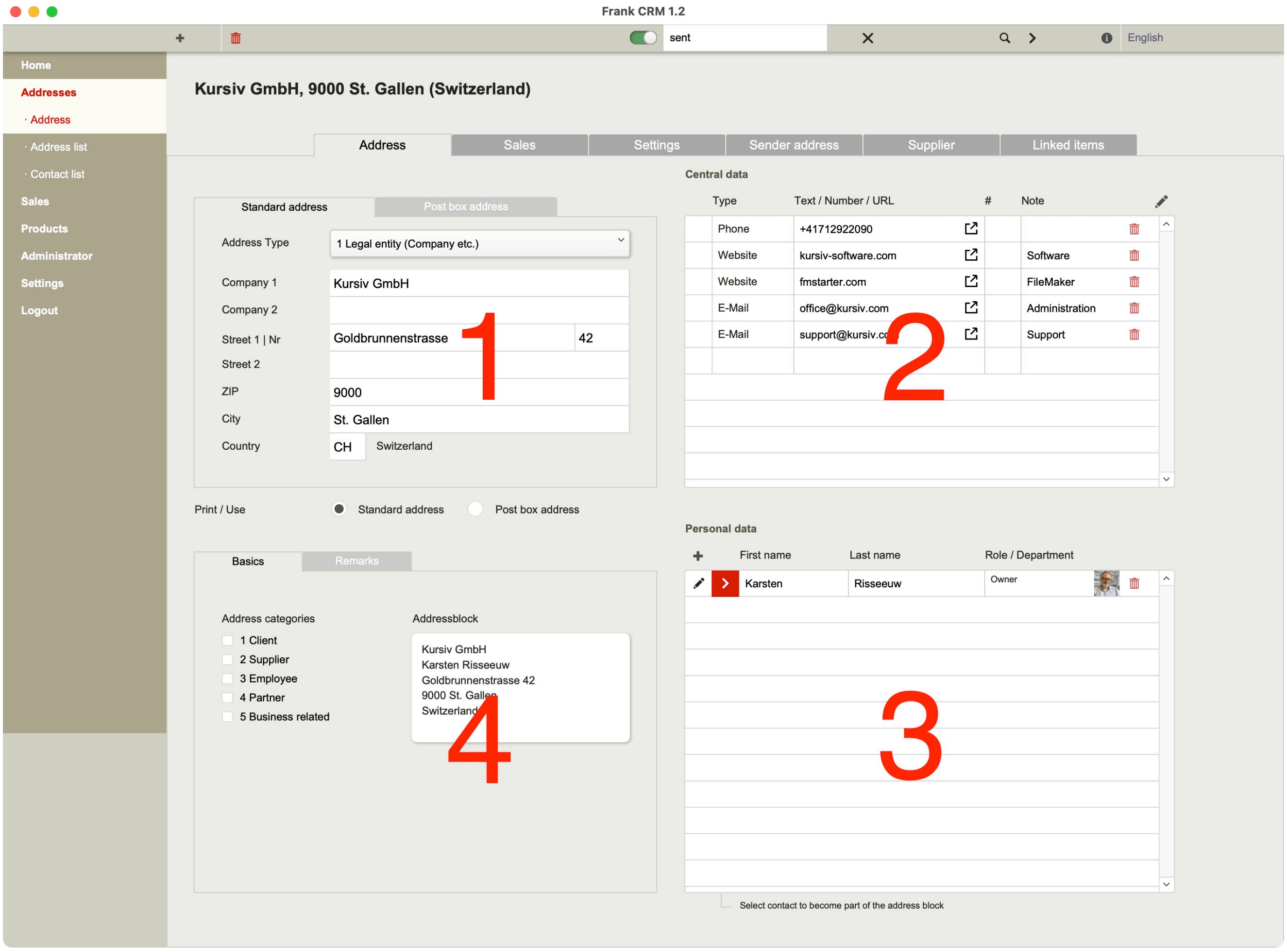
In the context of FRANK CRM, there is a notable difference between Addresses and Contacts. We are aware that many people refer to *contacts*, when they imply sending something to a specific *address*.

This is how Addresses and Contacts are defined within FRANK CRM:

- **Addresses refer to physical locations.** The address is where you ship an item to. It is the physical address on the envelope. Addresses within FRANK CRM have company names, streets, cities, etc.
- **Contacts refer to people** which work or live at any address. *Contacts always refer to real persons, never to physical addresses*. A contact can be someone working for that specific company or someone living at a private address.

Within FRANK CRM, all relationships are 1:n. This means, for example, that a single address can have multiple people attached to it. These are linked contacts. The same address will also have multiple communication options to that main address, like the main web address, a central email address or the main phone number. However, communication options for specific persons are linked to those persons (or: contacts) only.

Let's see how this works:



The screen for the address is cut in 4 parts.

1. In the **upper-left** part, the physical address is captured.
2. In the **upper-right** part you find the main phone lines, web address and the like, for this company. Keep these separate from contact information.
3. Below, in the **lower-right** corner, you see a list of contacts. These are the people working in that company. Click the pencil for a contact to edit.
4. In the **lower-left** part you see some basic settings for the address as well as a feedback to the formatted address as used for sales documents.

Connections in FRANK CRM

Most relationships are 1:n connection:

- A single address has multiple communication options (main options)

- A single address has multiple contacts
- A single contact has multiple communication options (personal options)

Why don't you have n:n-connections?

For some situations, it would be helpful to have n:n-connections. That would mean, for example, that a single address can have multiple contacts attached, but also that each contact or person can have multiple addresses attached.

These connections, however, would make the setup for FRANK CRM a bit more complex. The choice for FRANK CRM was to avoid overly complex workflows and rather focus on a straightforward design. The current basic setup will be easy to handle for most developers and cover most needs. If you have other needs, you can further develop the full version to meet your demands.

Information for developers

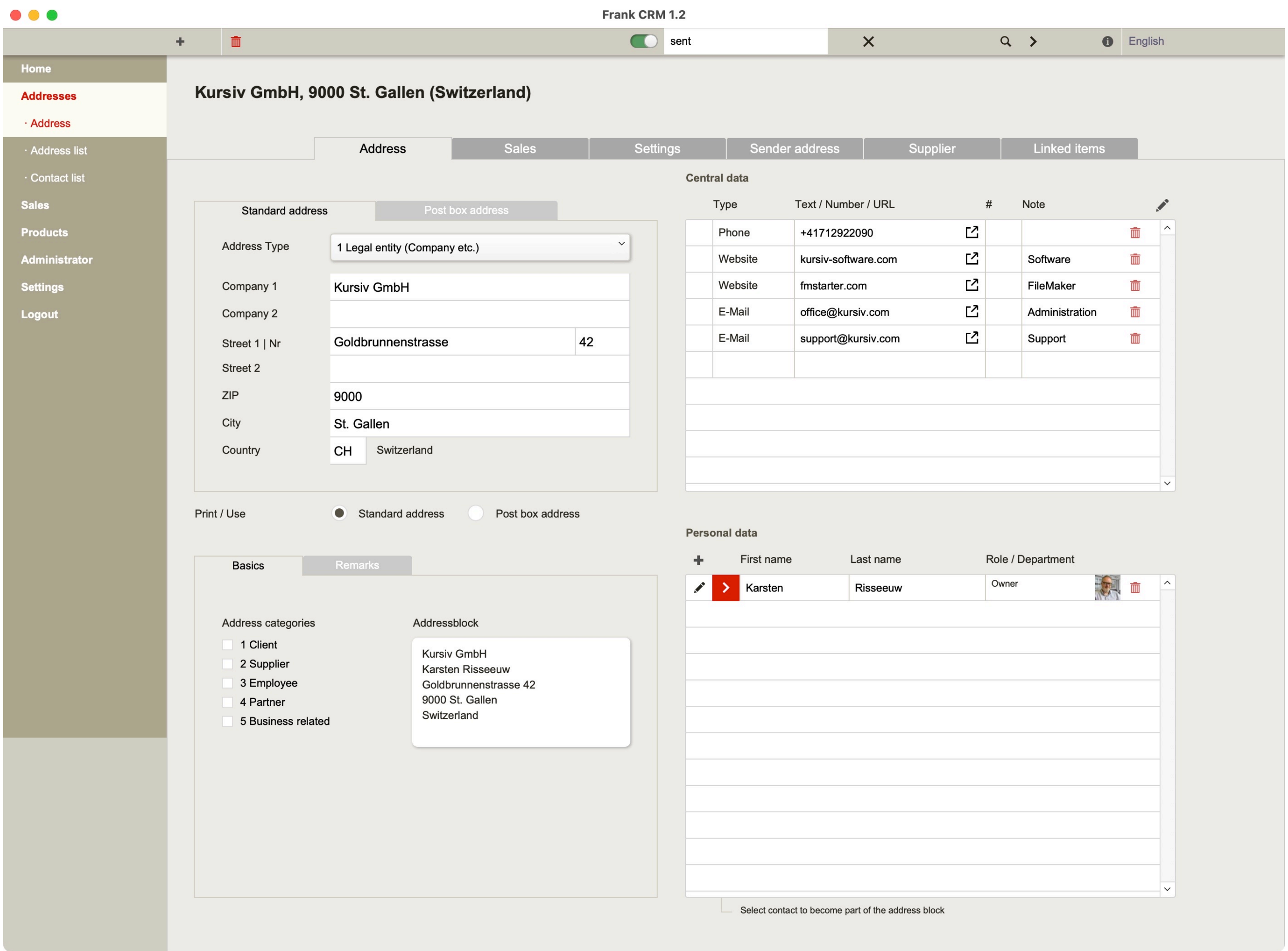
If you are a developer, there are more concepts of interest. Check out the chapter "Developer notes".

Addresses

Addresses

"Addresses" are physical locations, never people. An address can have people linked to that address, like employees to a company address or family members to a private address. People are called "Contacts". See also "Addresses or Contacts?".

Clicking on Address in the navigation will bring you to an edit screen of a single address. It looks like this:



This screen has all the address details, main phone numbers and contacts listed. It is the first of several tabs. Each tab has information on a certain topic. Tabs are:

1. Address (all main details)
2. Sales (all sales documents, or create a new one)
3. Settings (more details, like language, VAT, rebate groups)
4. Sender address (the address where invoices etc. come from)
5. Supplier (Is this a company you sell products from?)
6. Linked items (if this is the 5th address from an invoice, all items sold will be listed in this tab)

Check the options for each tab.

Adding an address

In the top bar, find the "+"-icon. Click that icon to add a new address. You will see the same approach in all other layouts.

Deleting an address

In the top bar, find the waste-bin-icon. Click that icon to delete the current address. Some related information will also be deleted.

The following information from this address will be deleted as well:

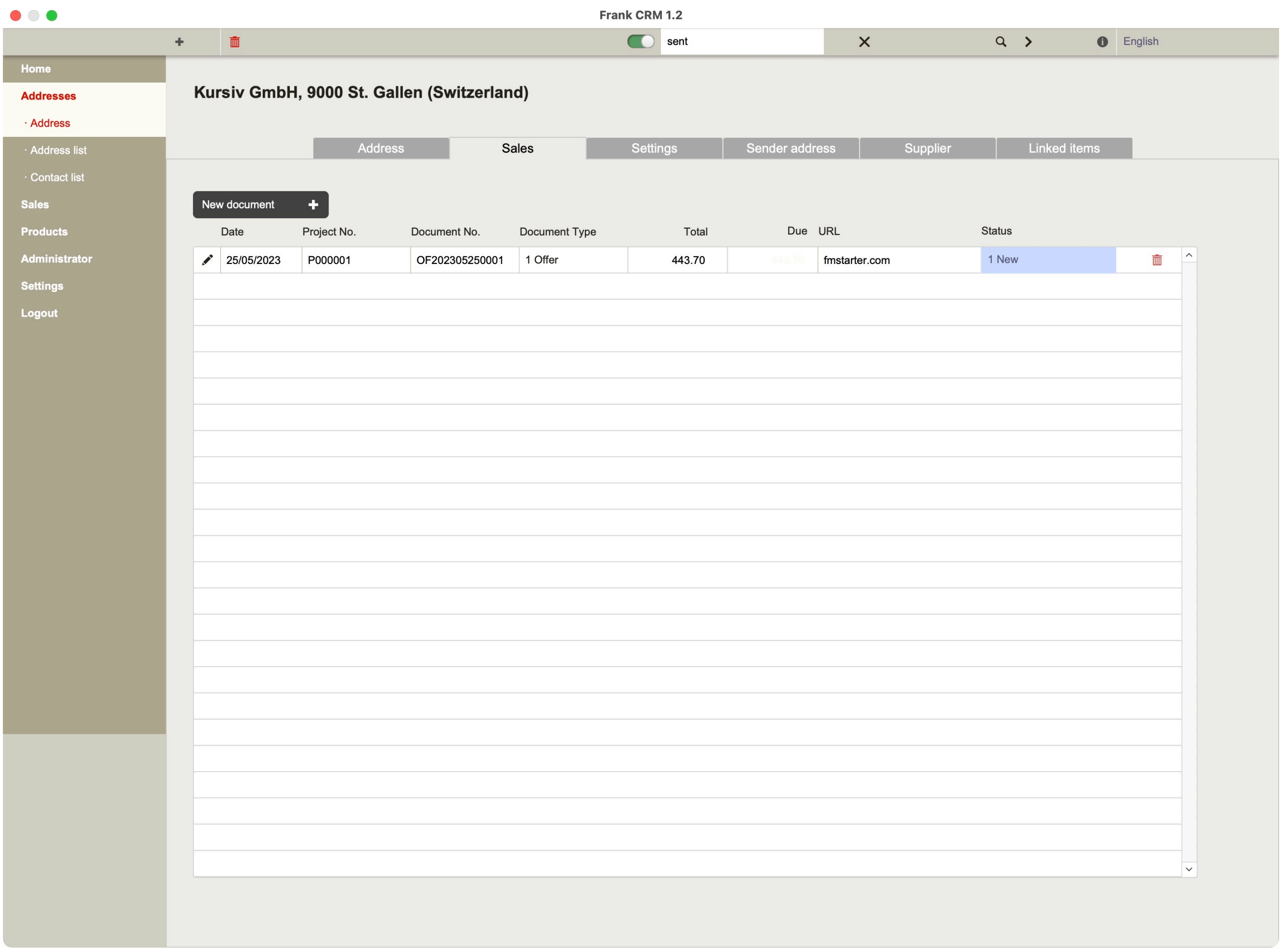
- Communication links (phone, email, websites, etc.)
- Contacts (all people linked to the address)
- Bank accounts (for that address)

The following information will **not** be deleted:

- Sales documents

List of sales documents

Each address has all sales documents listed in the tab "Sales".

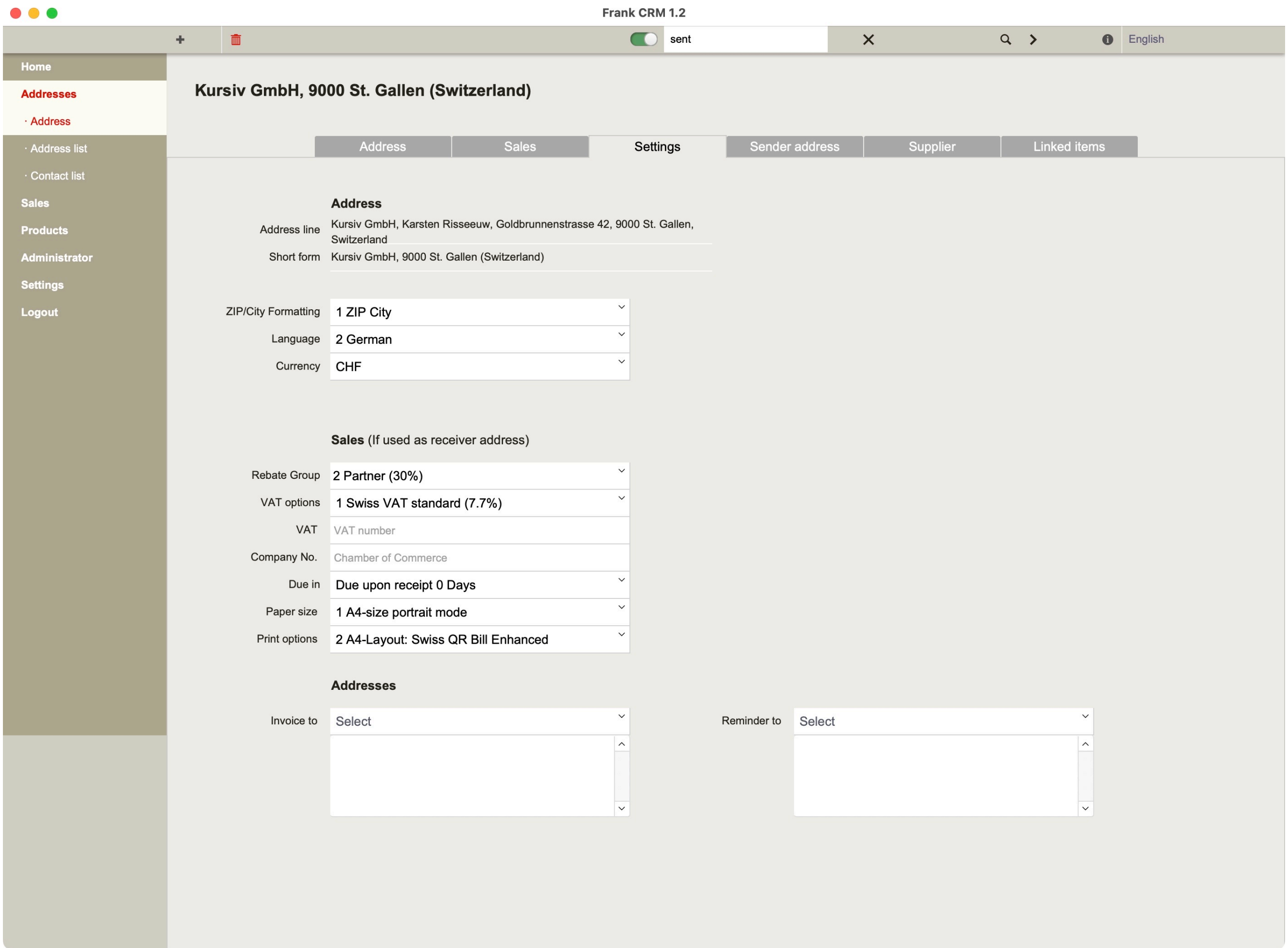


By clicking "New document" you can create a new sales document. This is the quickest and easiest way to create a sales document, as all settings for the address are known (as you are on the address already).

The list shows all documents created so far. Use the list to navigate to any specific document with ease.

Address settings

Each address has multiple settings. Some are related to the address itself, others to sales documents specifically.



Many options are filled out automatically, based upon settings for the country or generic other settings. The basic set-up is created when the address is created, the values are copied from the settings to the address and are now available here. Here also, you can change the settings. These settings are used as presets for sales documents.

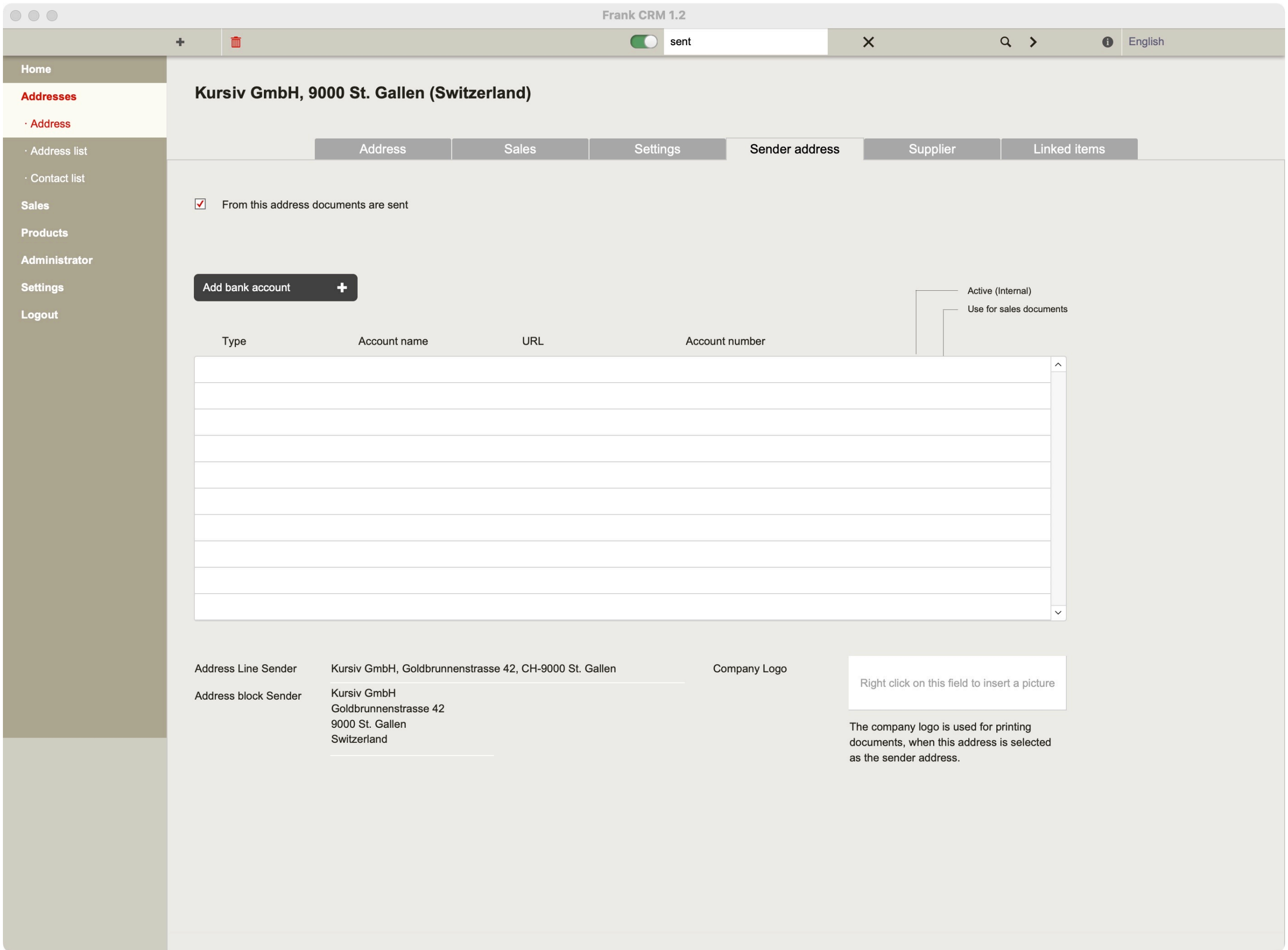
Sender address

The tab "Sender address" lets you activate some information if the address should be considered a sender address.

What is a sender address?

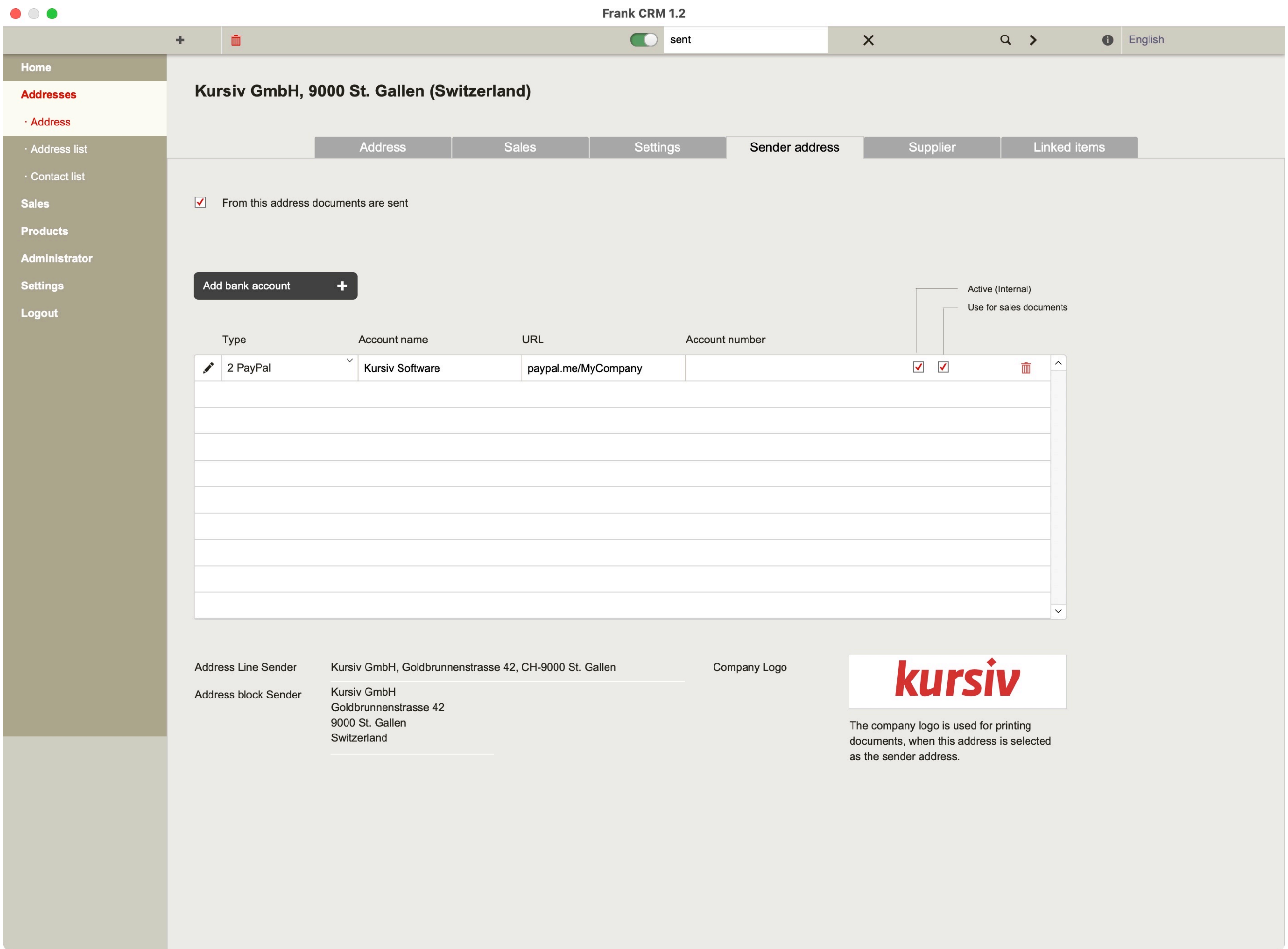
All addresses might have special functions. To be the sender address for documents is one possible function. If you want to send invoices from your company address, you want the address of your company to be the sender address.

Activate the address to be the sender address and additional options will be shown.



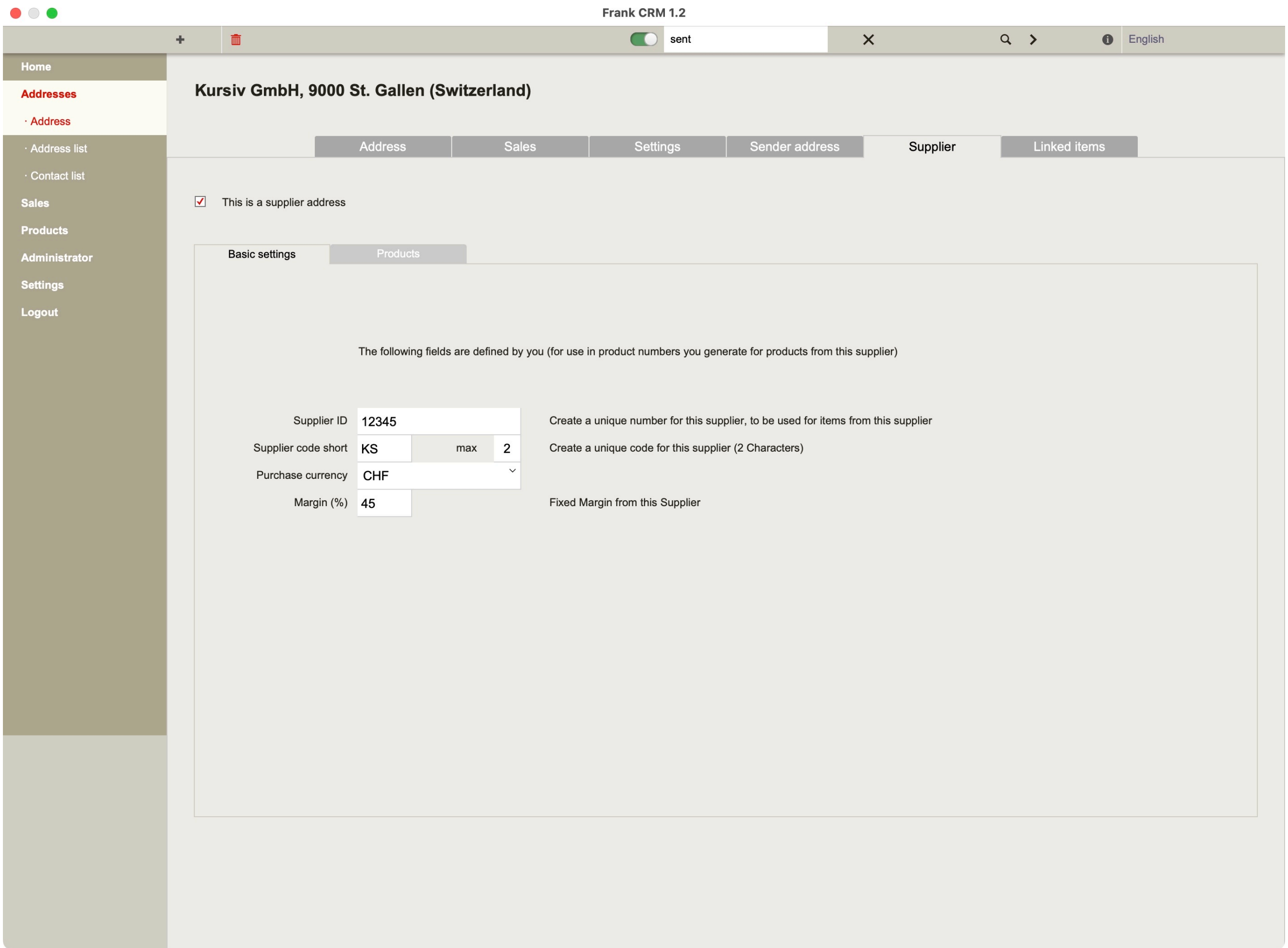
As a sender address, you will be able to add some information for creating sales documents:

1. Add bank accounts and payment options to be printed on sales documents
2. Add a logo for your company or service. It will be printed on sales documents.



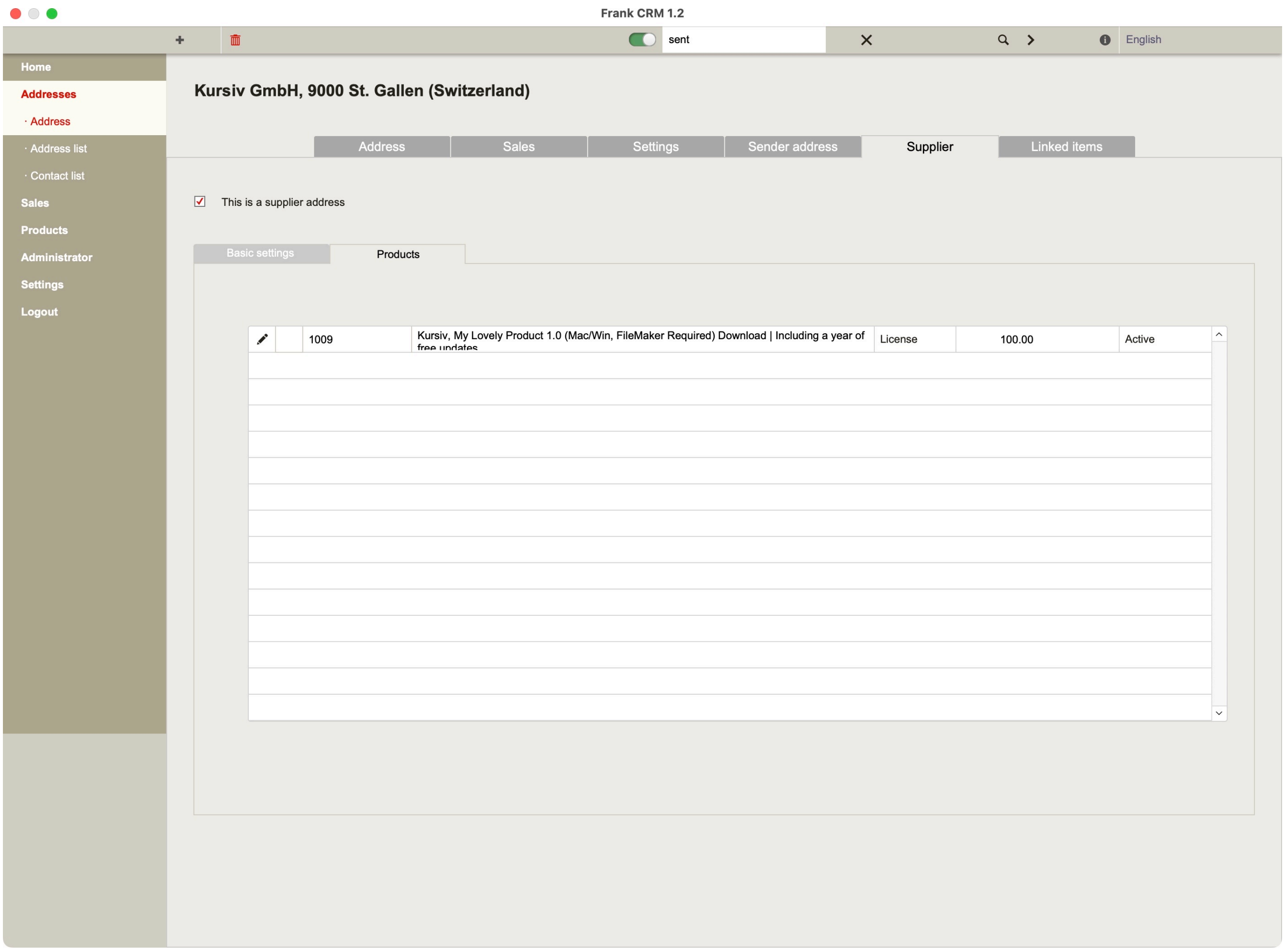
Supplier settings

If this address belongs to a supplier, from whom you purchase and resell goods or services, you can activate more options.



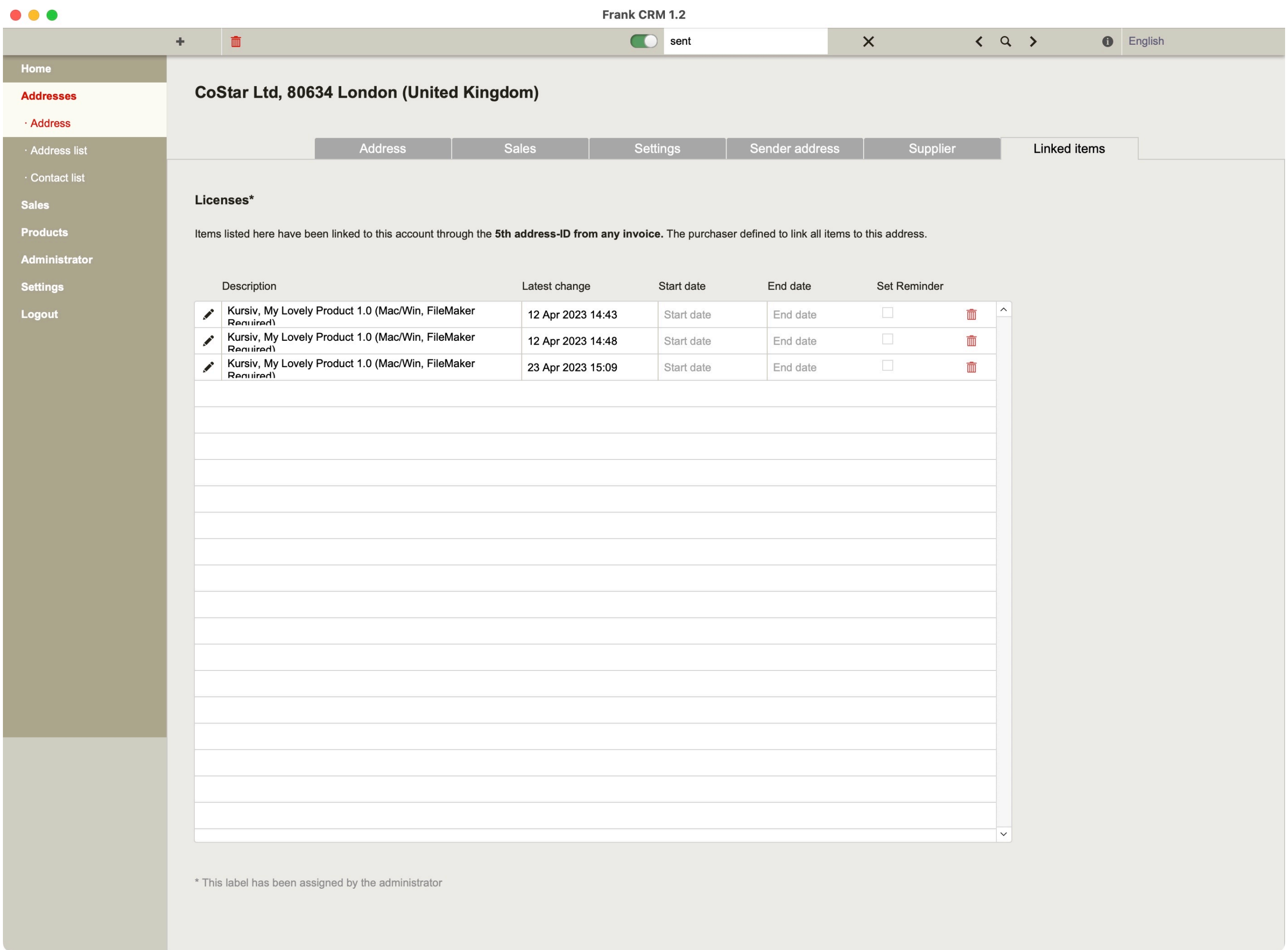
The **Basic settings tab** captures the Supplier-ID for internal purposes and some settings to create product numbers and price calculations.

The **Products tab** lists all products related to this supplier's address.


Frank CRM 1.2
sent
English
Home
Addresses
· Address
· Address list
· Contact list
Sales
Products
Administrator
Settings
Logout
Kursiv GmbH, 9000 St. Gallen (Switzerland)
Address
Sales
Settings
Sender address
Supplier
Linked items
This is a supplier address
Basic settings
Products
1009
Kursiv, My Lovely Product 1.0 (Mac/Win, FileMaker Required) Download | Including a year of free updates
License
100.00
Active

Linked items

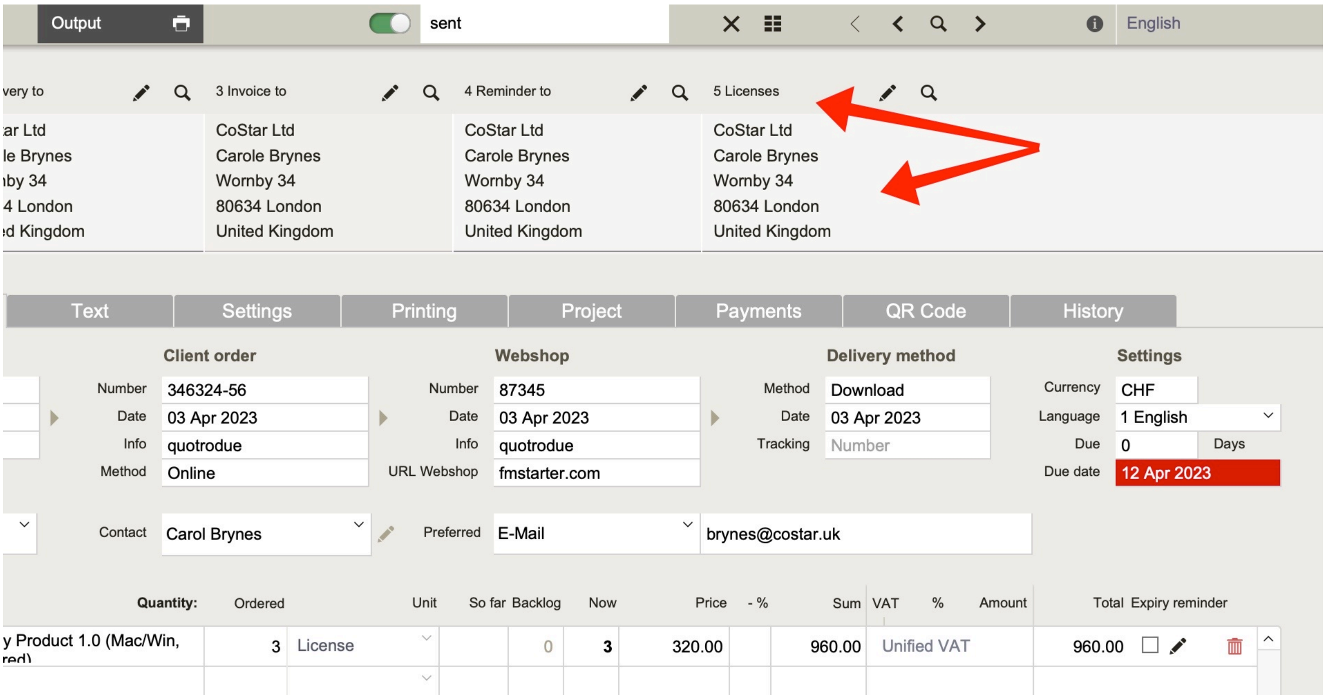
On the Linked items tab, you will find all items, which were listed in an invoice, where the 5th address of that invoice has the current address listed.



While this sounds cryptic, it does make sense. The 5th address is a label and reference only. Make it meaningful to you. You can define the label yourself under Settings > Sales. You can label this 5th address with anything you like, depending on your business.

What it will do: All items from an invoice will be listed to the 5th address and can be found at that address.

On the next screenshot of an invoice, the label and 5th address are pointed out.



Whether you have the customers' address or any other address listed here is not relavant. The items from this order will appear under "Listed items" for the address specified.

Example

Assume a reseller purchases a product for a customer. The order, confirmation, delivery note and invoice are all directed to the reseller. The 5th address though can serve the purpose of listing a specific client, the licensee, for the items purchased. If the purchaser and licensee are identical, you will see the same address for the invoice and the licensee (as in the screenshot above). If the licensee is a different company, click on the magnifying glass above the 5th address to search for that company and add it.

Once the 5th address is selected, all items from an invoice (invoice only!) will be listed to that address and search for the clients' address later, will reveal all licenses listed for this client.

You might find other creative usages for this option.

Sales documents

Sales documents

You want to create an offer, delivery note or invoice? This is the place to go.

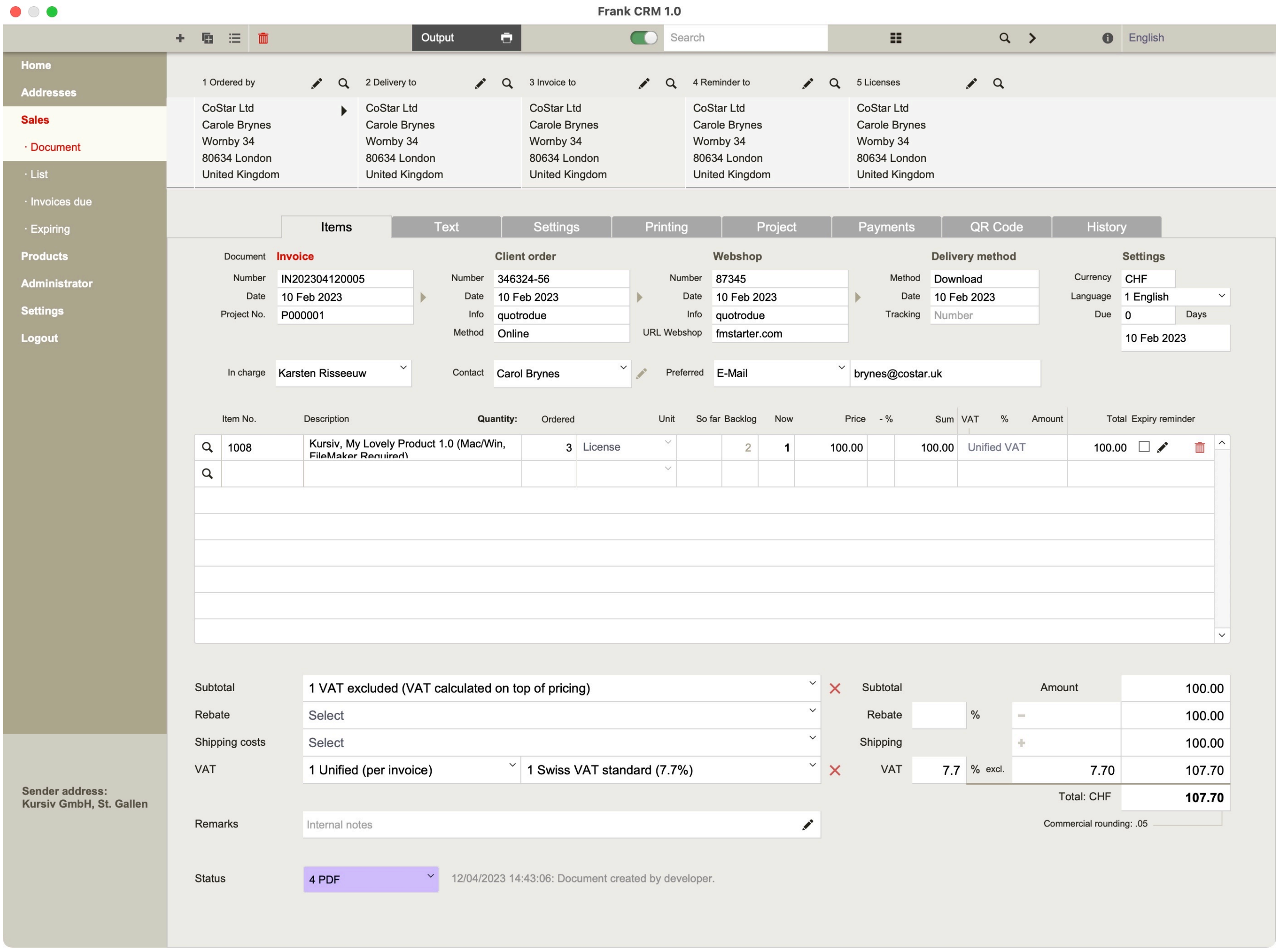
You can create new sales document either from any address (the easiest way) or right from the sales section in FRANK CRM.

Know the basics

Sales documents are found under "Sales" in the left navigation.

Some generic explanations

Sales documents combine a lot of information. There are several addresses involved, like the sender address and receiver address. Each sales document is of a certain type, like "offer", "delivery note" or "invoice". Each document has several groups of information, like the internal references, the customer references, the online references or delivery specifics. Other information involves the used currency or specified document language. These are combined the general information. On top of these sets of information there are settings for VAT handling, shipping costs, rebates and more. We haven't even gotten to the items for sales. Click through the tabs to see more information linked to this layout and document.



Sales items

For the content of the invoice, unlimited sales items can be listed. While it is possible to simply write into these lines and create your products "manually", it is advised to create products instead. Products combine a number of settings which can be repeatedly used. It can be a physical product you sell or a service you deliver. Create products under Products (in the left navigation).

Once products are created, you can search them by using the magnifier glass, or click in the Item No. field to get a dropdown list of all products. Once a product is selected, most information is added to that line automatically, directly from the product table. Now add the number ordered and move through this line from left to right by clicking the TAB key. Adjust where needed.

Products

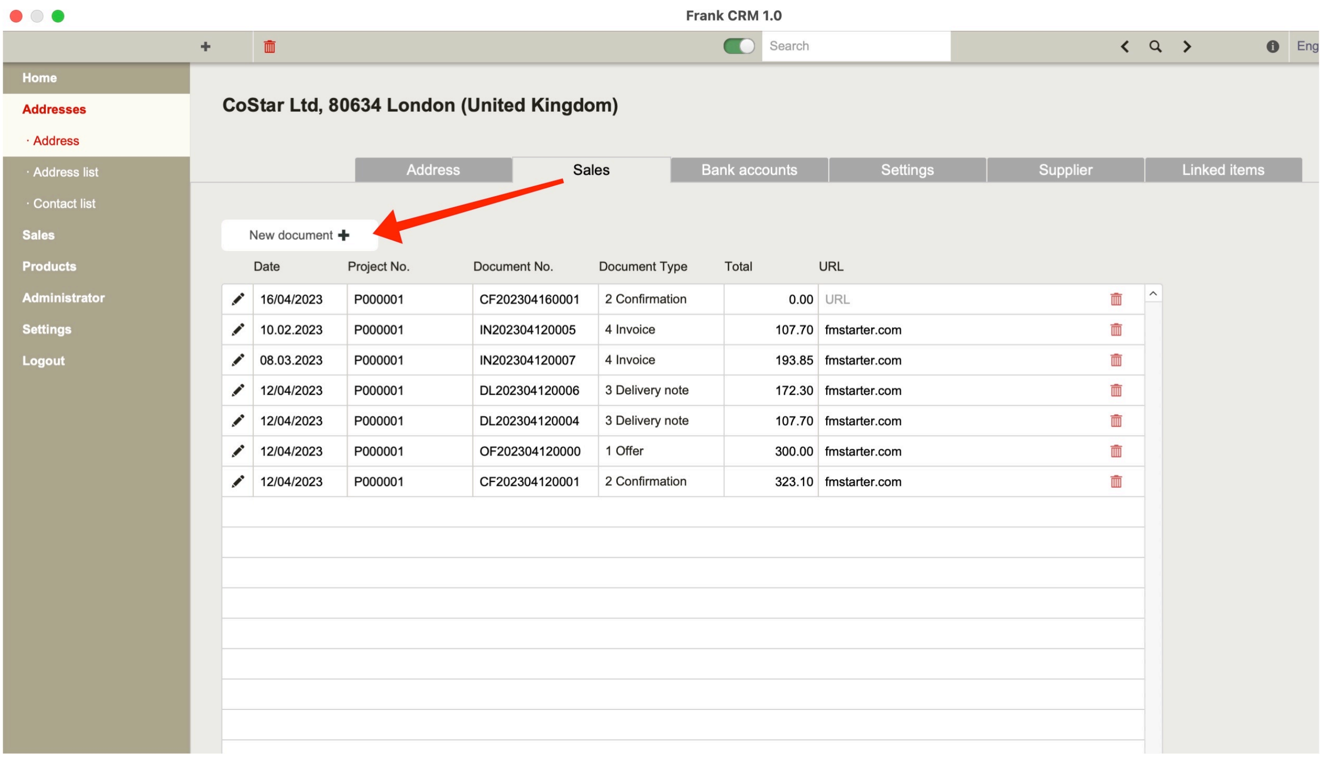
Head over to Products in the left menu to add or edit products.

Where to start?

How to create a sales document?

There are several ways to create a document. The best way is to create a workflow for yourself, a procedure you can follow every time. This will help speed up things and make sure that all important information is captured.

- The easiest way is to start from an address. Why? The address already has important settings defined. These address settings include things like the document language, currency and VAT handling. Probably the client has a basic rebate, which is defined in the address as well. Starting with the address will automatically copy all those settings to a new sales document.
- Alternatively, you can also start with a new sales document directly, then add the address and verify all settings manually.



The start from an address reflects our experience, that you first speak with a client, and only then create an offer, invoice or start other workflows. Therefor, it seems logical to start with the address. When a client calls or sends an e-mail, you first look up the client address in FRANK CRM. If the address lacks, you can add it instantly, check if all the information is correct, and go from there. One benefit is, that you have all past documents of that client at your fingertips if you are looking up the address first.

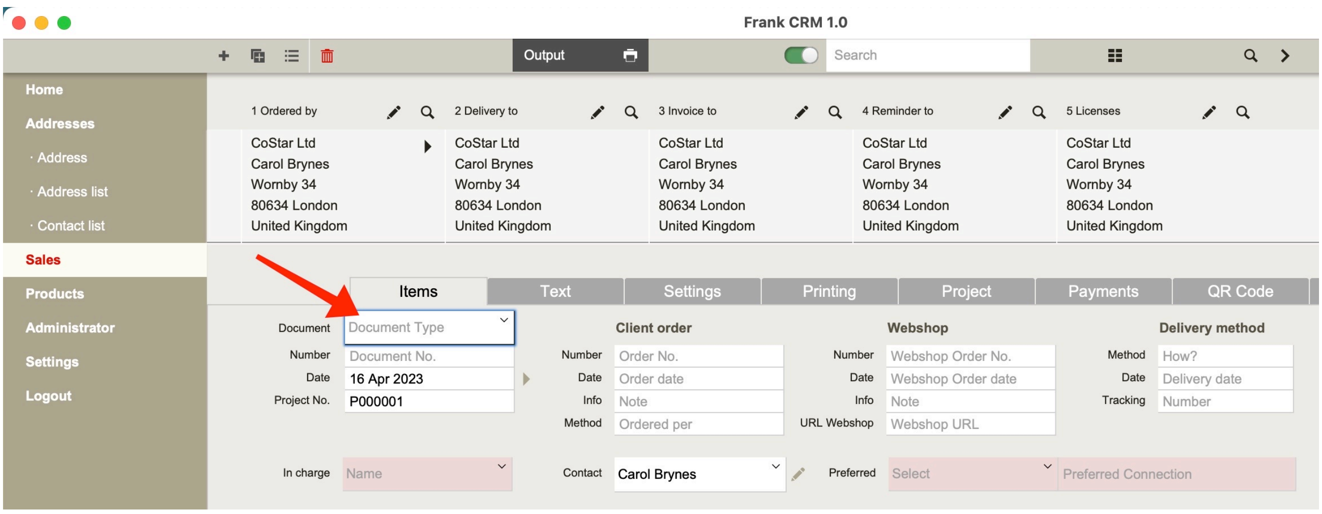
Document types

There are multiple document types. All documents are part of the same table, and differentiated by their document type number.

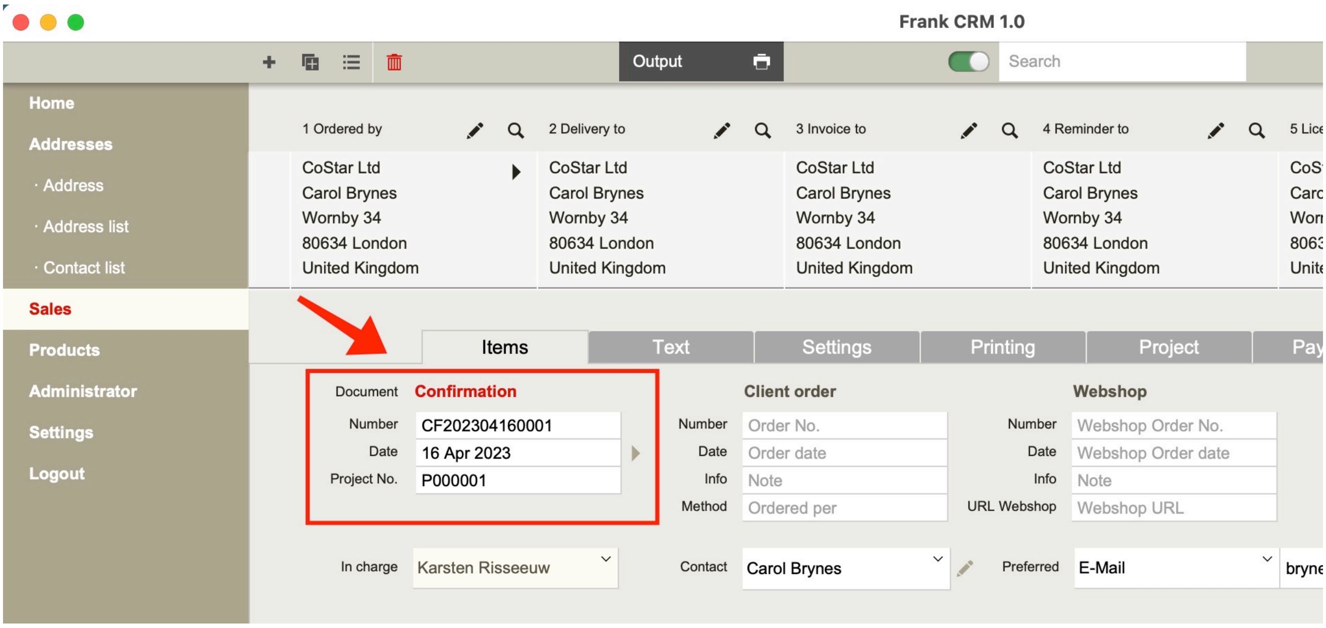
Document types

1. Offer
2. Confirmation
3. Delivery note
4. Invoice
5. Credit note

When you create a first document, you will be asked to select the document type. After you select the document type, you will not be able to change that type.



Once you select the document type, the document number will be generated.



A document number can integrate a code for the document type. How a document number is created can be freely defined under Settings > Sales.

Sales addresses

Each sales document has five addresses attached, which might be the same, or might differ. Each address fulfills a certain task:

Sales addresses

1. Ordered by
2. Delivered to
3. Invoice to
4. Reminder to
5. [Optional address]

When you create an invoice from an address, all five sales addresses are automatically set to that address. However, it is possible to differentiate the addresses as well. This set-up is makes sure that many different situations can easily be met.

How are these addresses used?

Ordered by
The person or company who ordered. This address is used to send offers and confirmations to.

Delivered to
This is the delivery address.

Invoice address
Especially in larger companies, the invoice address might be different from the actual delivery address.

Reminder address

Usually, the reminder address is the invoice address. However, in some situations, the person or department ordering something is in charge of any follow-ups. Thus, you can set a reminder address different from an invoice address.

[Optional address]

The optional address can be defined under Settings > Sales. This might be a special address, like that of a Licensee. The administrator can set the meaning and title in the settings. This setting is then valid for all 5th addresses of all sales documents. For example: If a Reseller is purchasing a software on behalf of a client, the order, delivery and invoice go to the reseller, but the actual licensee is a different address. This 5th address can be set as "License address".

When you create a new document, the 5th address will be the [ordered-by] address. If you need to change that address, make sure, the address is already available.

How is the 5th address used?

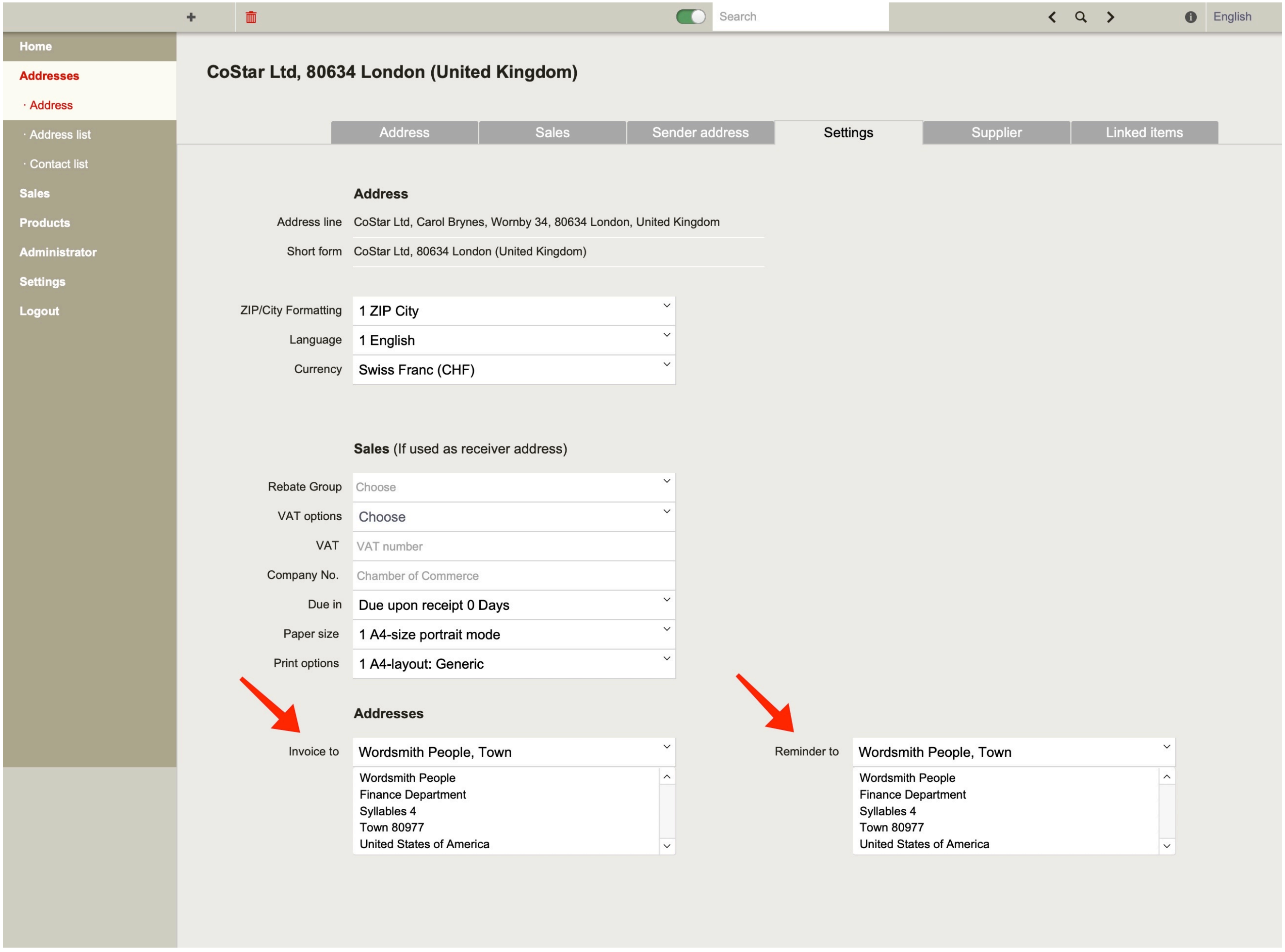
All items linked to that address through the [5th address] will be listed to that address. This enables you to set the 5th address to be that of a licensee, and the licensee's address has all licenses listed to itself, even though invoices were issued through a reseller.

Be aware that the **label of the 5th address** is a setting which is valid for "all" sales documents, not "per" sales document.

Predefined Addresses

For some companies, specific invoice addresses must be used. You can predefine an invoice address and a reminder address under Addresses > Settings. These can be different from the customers' main address. When creating a new sales document from this address, the specified invoice and reminder address will be used.

Change the settings for the address to achieve this:

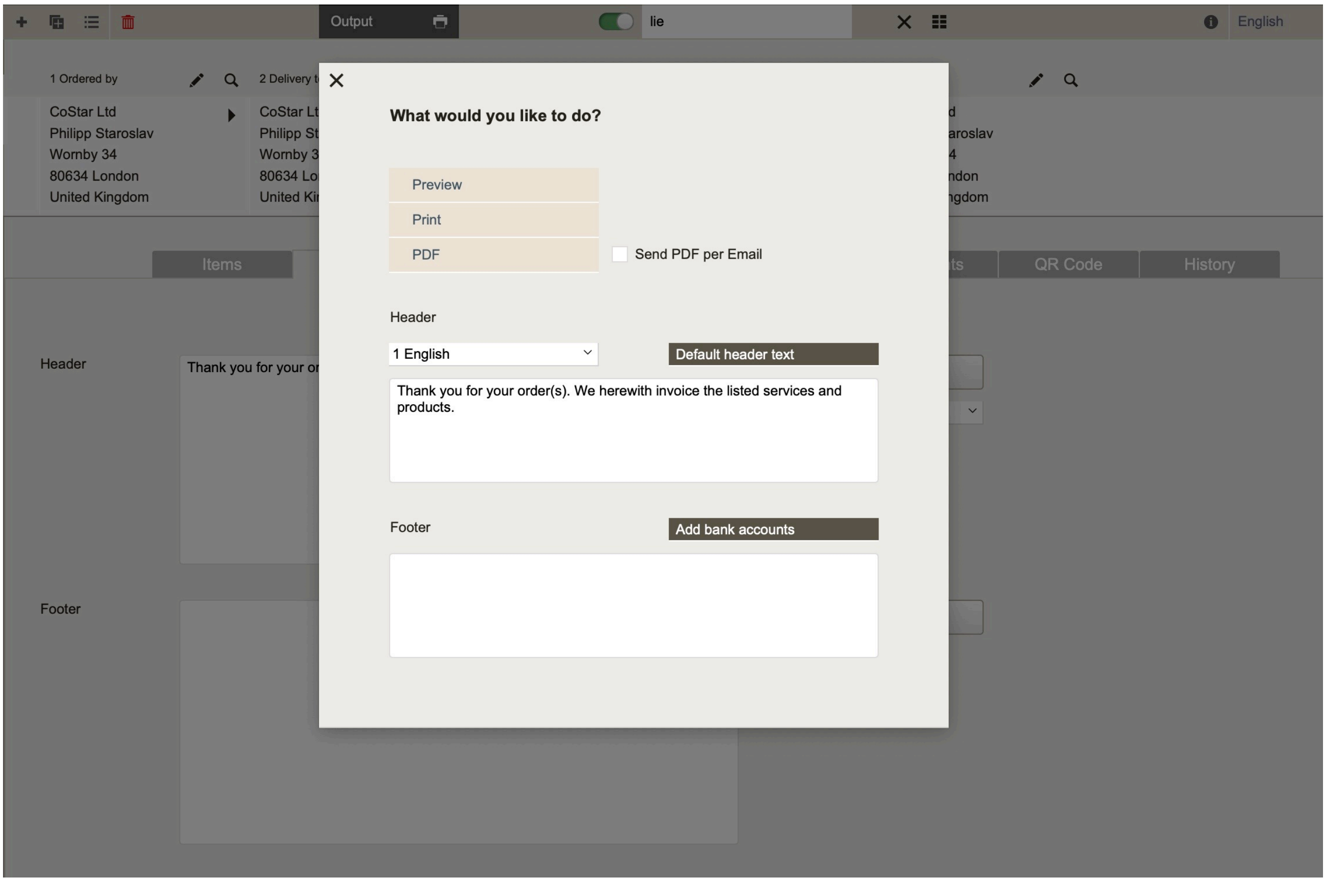


Printing

Now you know the basics, go ahead and create your first document. Add all the details as you would typically see them. Add at least one sales item.

Output

Once you are finished entering details, click on "Output" in the top bar to either print or create a PDF from the invoice. A card window appears, where you can choose between several options and where you also can adjust any header or footer text.



If you have defined an email address in the sales document, you can even automatically create an email which will open in your email application, with the PDF file attached. This makes it extremely efficient to get any invoice to a client.

Paper Sizes

FRANK CRM supports both **A4-format** and **Letter format** sales documents. Under Settings > Country Settings, you can set the preferred format for any country as a standard preference. The official settings for each country have already been set.

When creating an address of a client, the Country Settings apply and the paper size for that country is copied to the address. If needed, this can be changed under Address > Settings. When creating a sales document from that address, the value again is copied, now to the sales document. This all works seamless, but if you need to change anything, you can do so under Sales > Settings.

Based on the paper size as defined in your sales document, either an A4-sized or a Letter-sized print layout will be used.

Additional options

FRANK CRM has been set up in a way that printing of an invoice can be enhanced with country-specific requirements. While the basic set-up involves generic layouts for two paper sizes, it is possible to integrate other options.

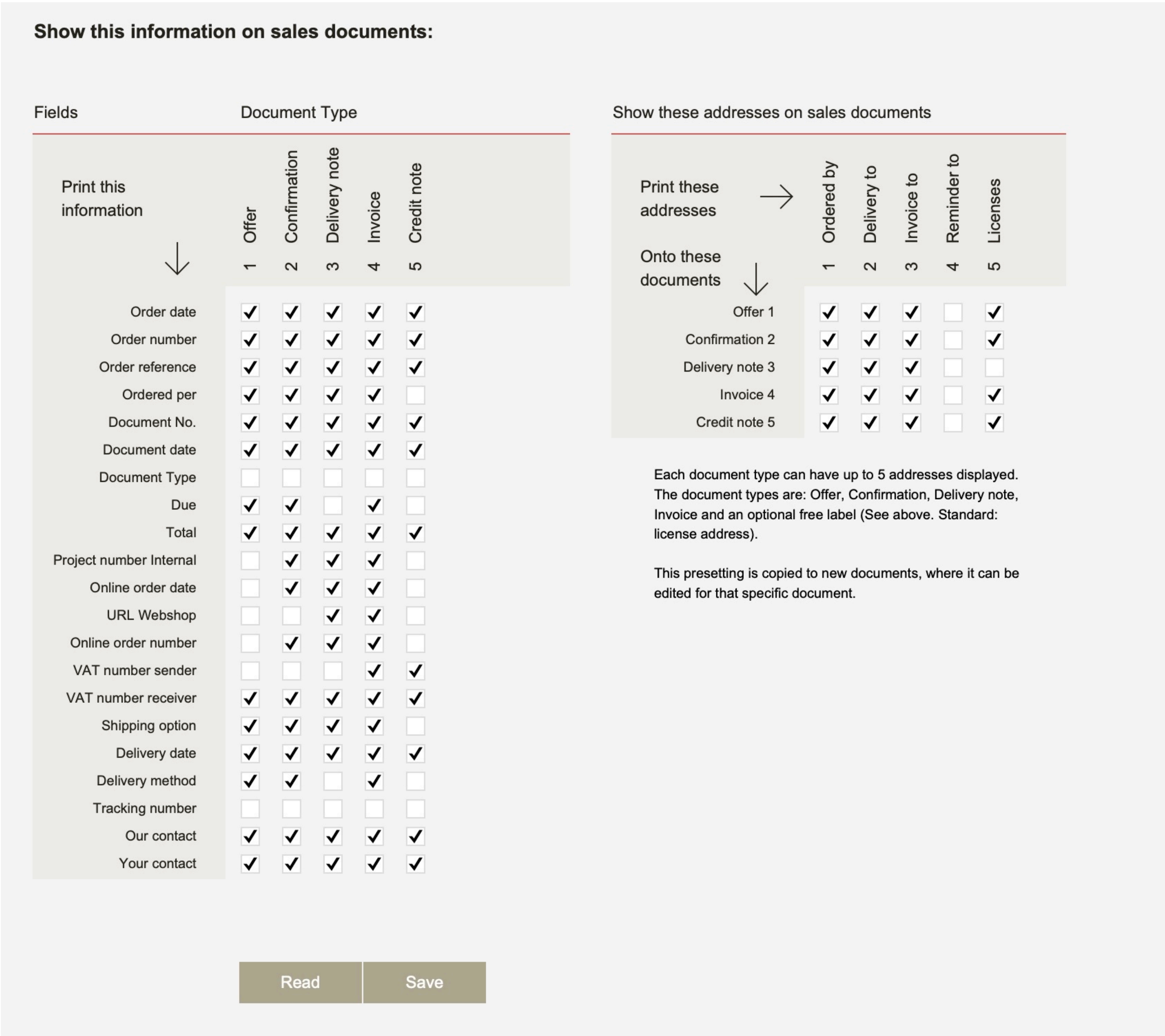
- For **Switzerland**, a special payment slip with a Swiss QR Code has been integrated. More on this > here.

Printed information

Each sales document has much information, which can be printed or which can be left out at printing.

Which information should be printed?

The basic settings can be defined under: Settings > Sales.



Show this information on sales documents:

Fields — Document Type

Print this information

	1 Offer	2 Confirmation	3 Delivery note	4 Invoice	5 Credit note
Order date	✓	✓	✓	✓	✓
Order number	✓	✓	✓	✓	✓
Order reference	✓	✓	✓	✓	✓
Ordered per	✓	✓	✓	✓	
Document No.	✓	✓	✓	✓	✓
Document date	✓	✓	✓	✓	✓
Document Type					
Due	✓	✓		✓	
Total	✓	✓	✓	✓	✓
Project number Internal		✓	✓	✓	
Online order date		✓	✓	✓	
URL Webshop			✓	✓	
Online order number		✓	✓	✓	
VAT number sender				✓	✓
VAT number receiver	✓	✓	✓	✓	✓
Shipping option	✓	✓	✓	✓	
Delivery date	✓	✓	✓	✓	✓
Delivery method	✓	✓		✓	
Tracking number					
Our contact	✓	✓	✓	✓	✓
Your contact	✓	✓	✓	✓	✓

Show these addresses on sales documents

Print these addresses → Onto these documents

	1 Ordered by	2 Delivery to	3 Invoice to	4 Reminder to	5 Licenses
Offer 1	✓	✓	✓		✓
Confirmation 2	✓	✓	✓		✓
Delivery note 3	✓	✓	✓		
Invoice 4	✓	✓	✓		✓
Credit note 5	✓	✓	✓		✓

Each document type can have up to 5 addresses displayed. The document types are: Offer, Confirmation, Delivery note, Invoice and an optional free label (See above. Standard: license address).

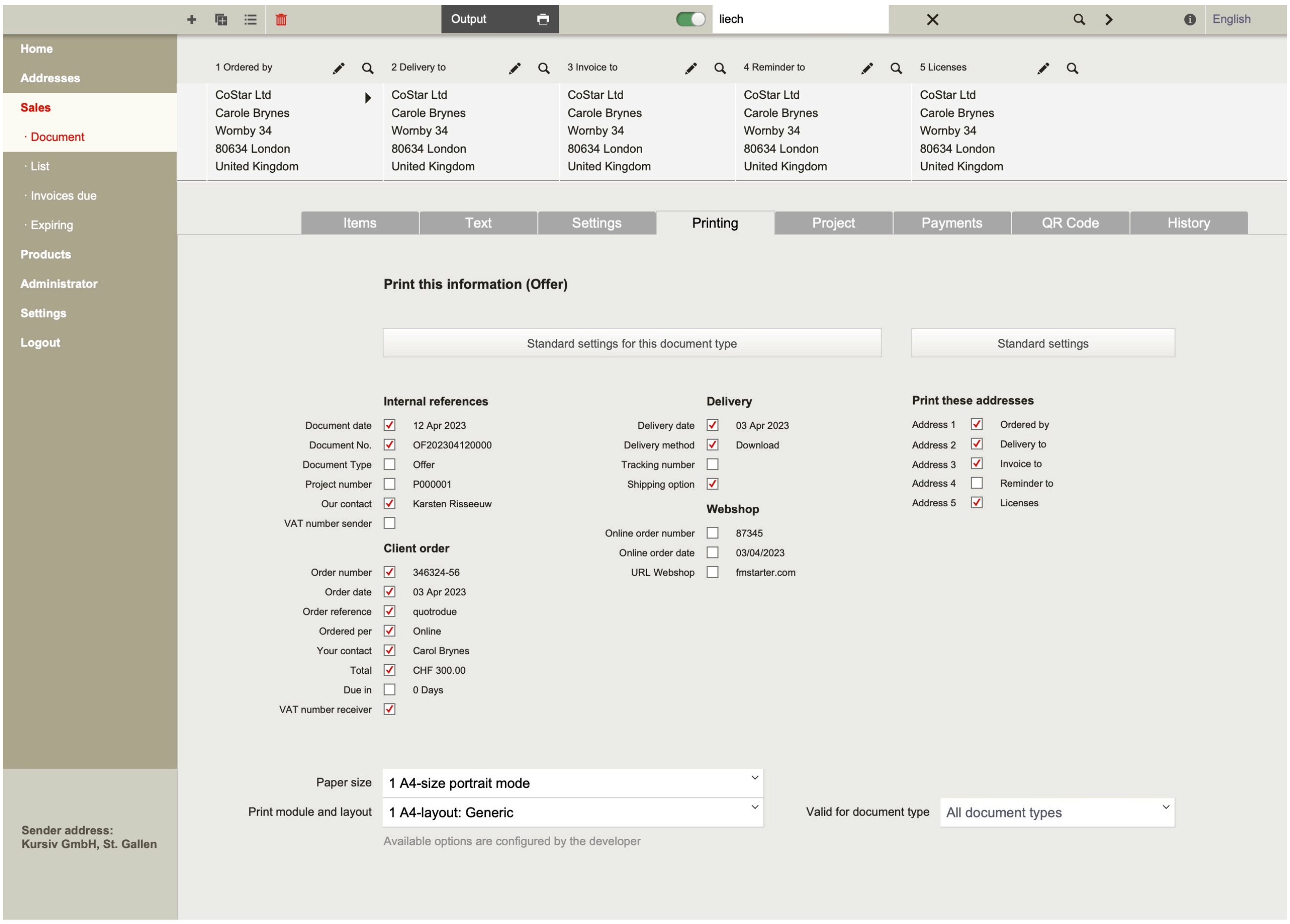
This presetting is copied to new documents, where it can be edited for that specific document.

Read Save

There are **5 document types:** Offer, Confirmation, Delivery note, Invoice and Credit note. For each of these document types, it can be defined which information should be shown on a printed document. Choose the options you prefer to show and save the settings. For example, an order date is not relevant on an offer. You might want to leave that information out on an offer.

Similar, there are **5 addresses,** which can be printed on a sales document: Ordered by, Delivery to, Invoice to, Reminder to and a [5th address]. The last address can be used for multiple purposes and labeled as you like. Choose which addresses are shown on which document type. For example, the address to send a reminder to is usually not relevant for any document type. You can safely leave that out, except for a special situation.

These basic settings must be saved and then will be used whenever a new document is created. All settings will then be copied to that document. You find that information under: Sales > Printing.



In case you want to change anything, you can still include any information here by checking the checkmarks of your choice, or remove any information by removing any checkmark.

When a document is printed, the selected options are put into a variable, which is shown on the print layout. All information is listed with the proper translated label. It can look like this:

Frank CRM 1.0 - 3

Kursiv GmbH
Goldbrunnenstrasse 42
9000 St. Gallen
Switzerland

Offer	OF202304120000
Total	CHF 300
Document date	12 April 2023
Order date	3 April 2023
Order No. online	346324-56
Order reference	quotrodue
Ordered per	Online
Your contact	Carol Brynes
Our contact	Karsten Risseeuw
Vat nr. receiver	
Delivery date	3 April 2023
Delivery method	Download

Kursiv GmbH, Goldbrunnenstrasse 42, CH-9000 St. Gallen

CoStar Ltd
Carole Brynes
Wornby 34
80634 London
United Kingdom

St. Gallen, 12 April 2023

Offer OF202304120000

Ordered by	Delivery to	Invoice to	Licenses
CoStar Ltd	CoStar Ltd	CoStar Ltd	CoStar Ltd
Carole Brynes	Carole Brynes	Carole Brynes	Carole Brynes
Wornby 34	Wornby 34	Wornby 34	Wornby 34
80634 London	80634 London	80634 London	80634 London
United Kingdom	United Kingdom	United Kingdom	United Kingdom

Thank you for your interest in our services. We herewith send you our offer.

Article Number, Description	Ordered Unit	Unit price	- %	Line total
1008 Kursiv, My Lovely Product 1.0 (Mac/Win, FileMaker Required)	3 License	100.00		300.00

	%	Amount	
Subtotal			300.00
VAT		0.00	300.00
Currency: Swiss Francs. Commercial rounding: 0.05			**Total: CHF 300.00**

Invoice due in 0 Days after invoicing. (Payable until: 12 April 2023).

1 / ?

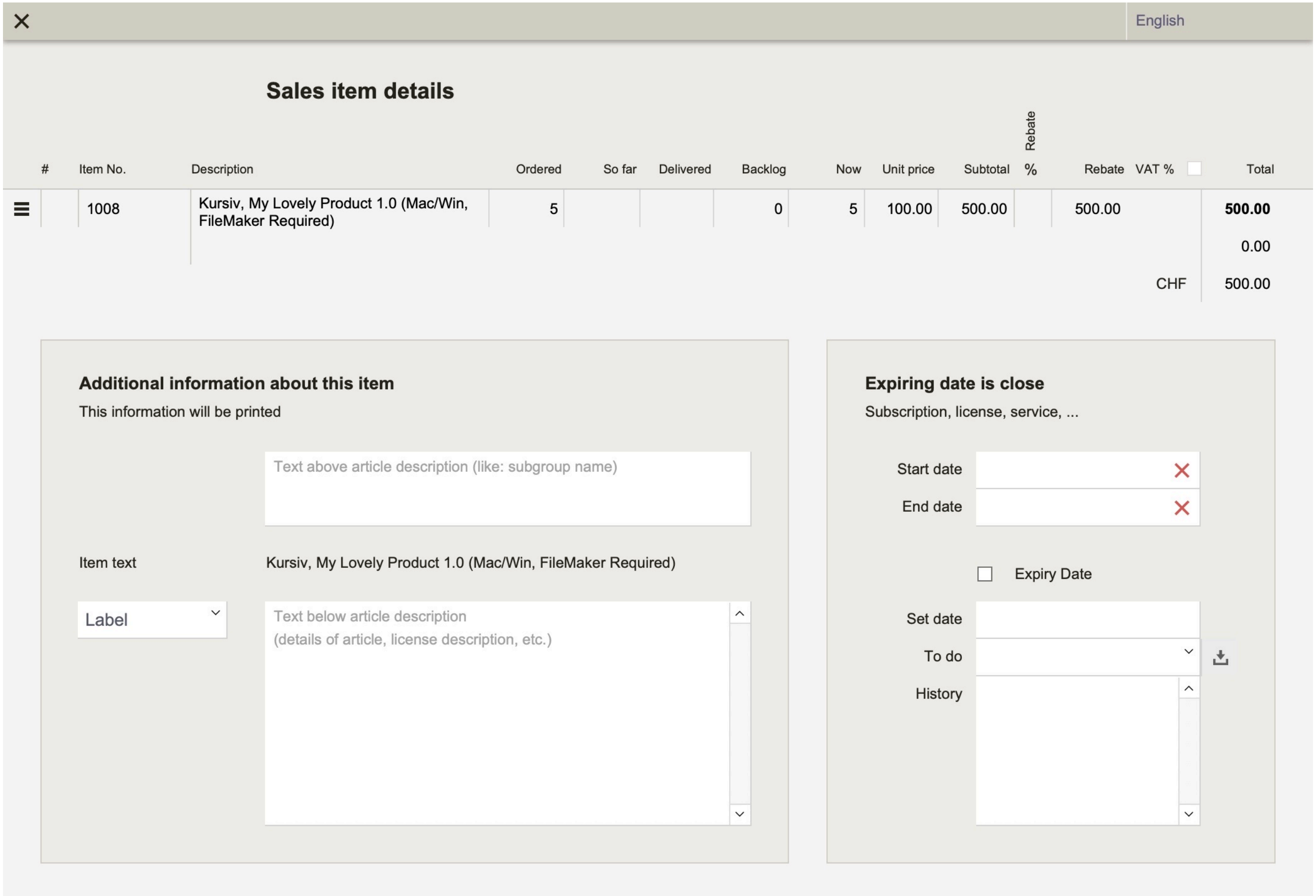
The information from any document is merged into a single information block for printing instantly. It can be managed through simple checkmarks and presets.

As this is done on the fly and just before the output, it is possible to change any settings, even the document language or currency (which will recalculate all prices automatically), or any other information, and create a new document right away.

Item details

Add more information to a sales item

Each sales item in a sales document can have multiple options attached, like start and end dates, or additional text. To enter this information, click on the "Edit" (or: pencil) symbol for any of the sales items. A card window will pop up, where you can enter additional information.



Text above

The "Text above" is a short title you can write above this Sales Item. It will thus mark a new section on your invoice.

Text below

The text below is the "Item text". It will be printed just below the primary sales information (like: items ordered, delivered, price, etc.). This is the place to add additional information, like a license code or similar, or enter some extra text, not defined by the product description. The "Item Text" will have its own label, which can be chosen. This can define the type of information as is contained in the text field, like "License" or "Details". The choice is editable as well, under Settings > Item Text Labels.

Expiry dates: Start and end date

If your product or service has an expiry date, you can set that on the right side.

- Be sure to set the **checkbox "Expiry date"** if you want to list this information on sales documents and internally to send out emails to inform clients about expiring items.
- **Set date:** Set the date when you wish to send a reminder*
- **To do:** Define how you want to send a reminder or what to do
- **History:** Click on the download-button next to "To do" to write the date and action to the history field. Thus, you can keep track of any activities.

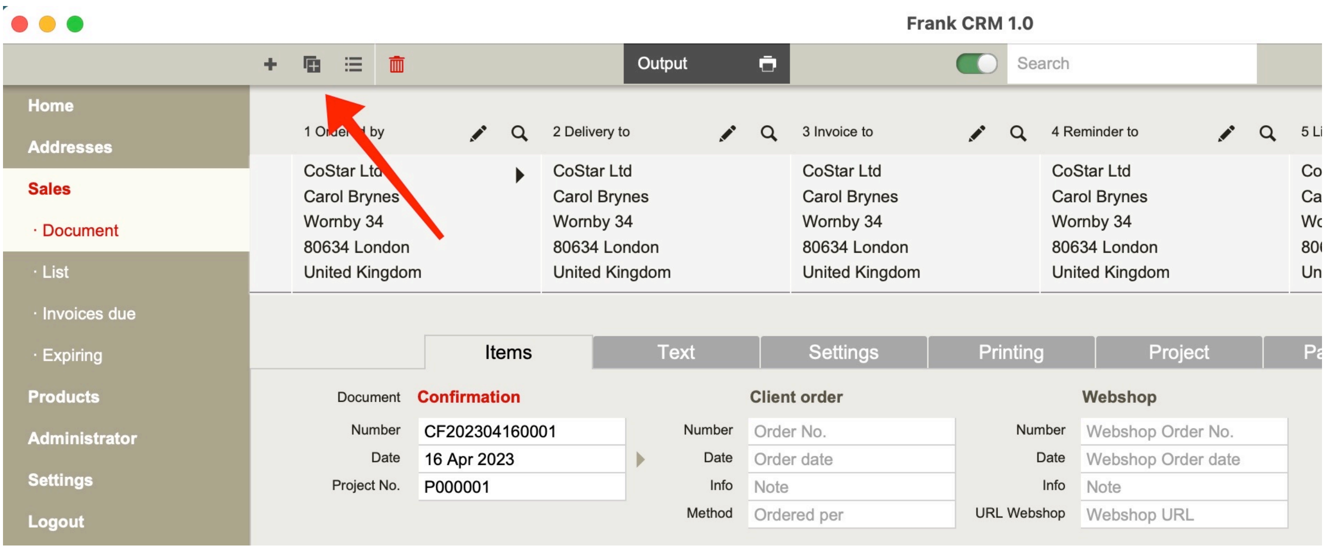
* You must regularly check for expiring items. The date does not trigger anything. It is just an indication. You must send the reminder, using the tools from the list of expiring items.

Duplicating documents

Any document can be duplicated. This will create a new document of any type. It will include all sales items of the previous document. Did you create an offer? Duplicate to create any other sales document with the same information. From an offer, create a confirmation, delivery note or invoice with a few clicks.

Duplicating documents

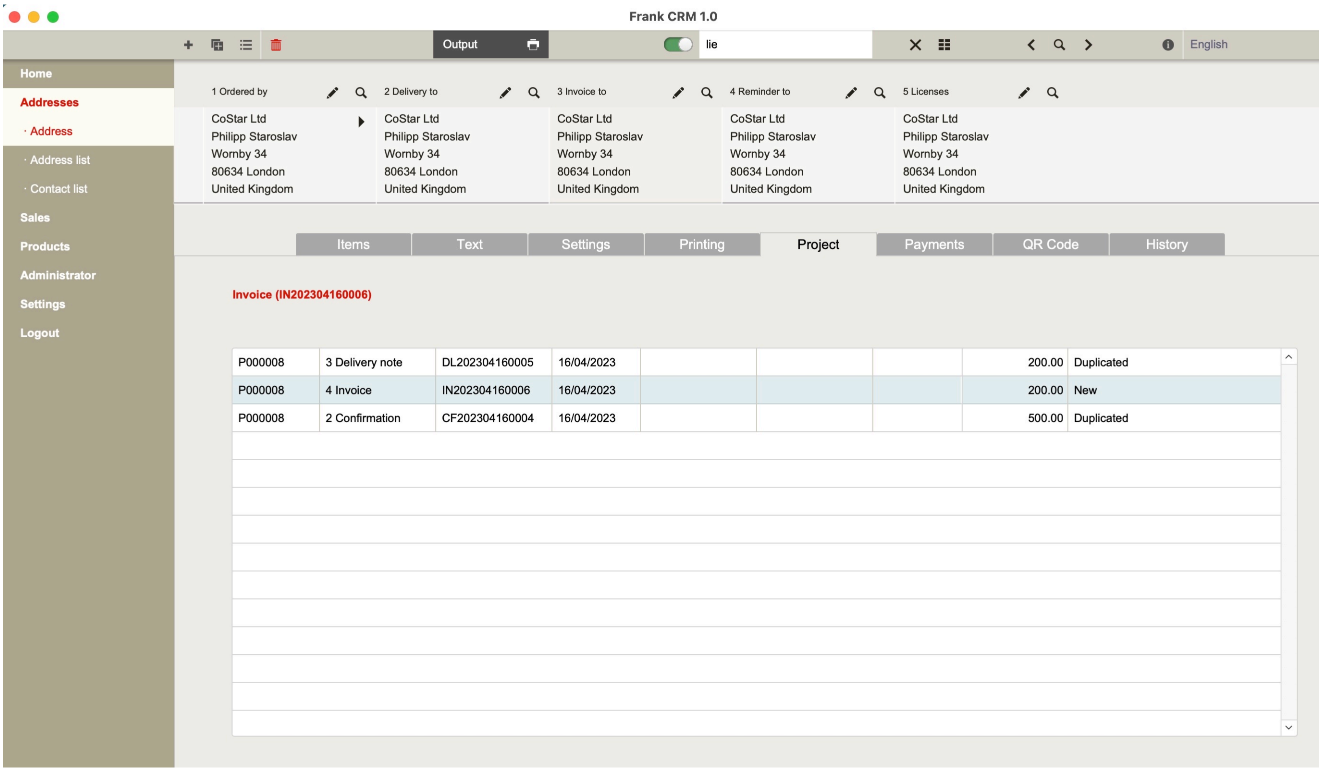
To duplicate any document, click on the duplicate icon in the top bar.



This function makes it a snap to come from an offer to a confirmation to a delivery note or to an invoice. Each document will have its own number, and all items will be duplicated as well. Thus, each document is unique.

Sharing the project number

Duplicates of documents will share the same project number. Thus, it is easy to see which documents are linked to the current document. You will be able to see this by clicking on the tab "Project".



All documents will have the same project number. This way you can track the documents generated for the same project. The word "Project" has no meaning in FRANK CRM beyond this usage. There is no project management in an extended sense.

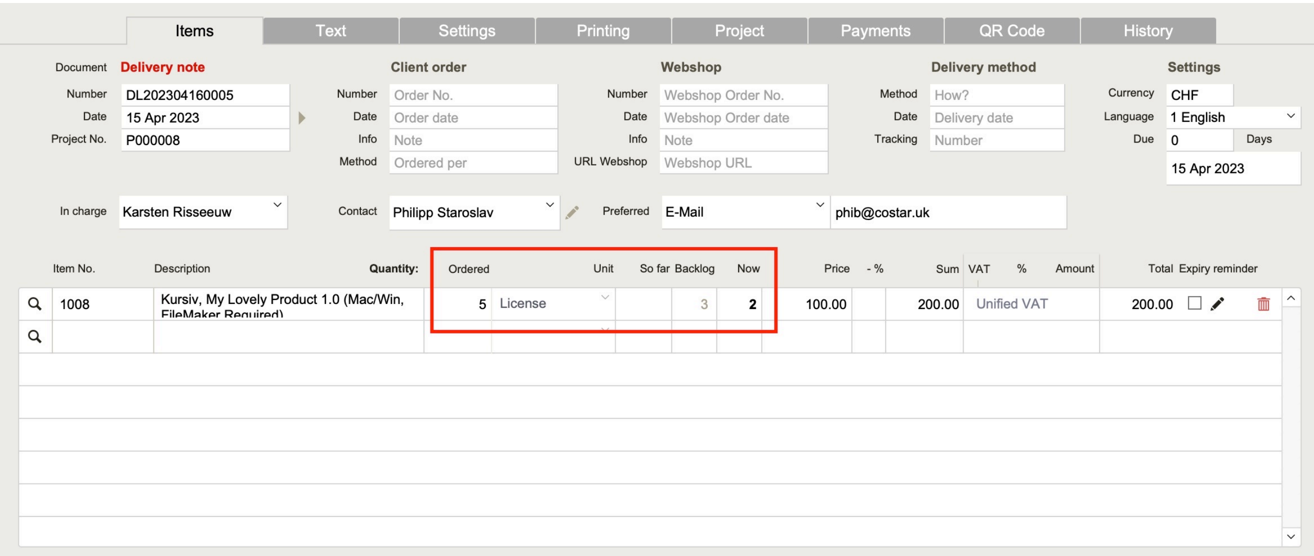
Partial deliveries

Partial deliveries and partial invoices

Using the duplicate option, it is easy to create partial delivery notes and from these partial invoices. This can be helpful if the ordered items cannot be delivered all at the same time.

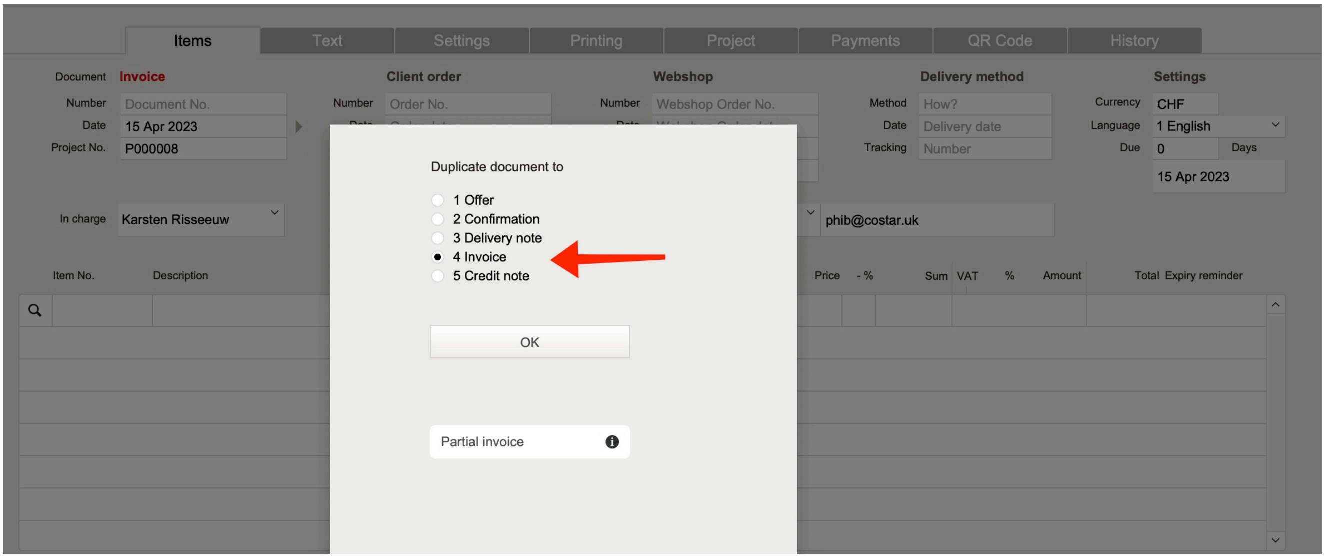
The trick is in the delivery notes. If you create a delivery note where only part of the ordered items is delivered, you can duplicate that same delivery note to list all the items missing from deliveries so far (and again this can be adapted). Partial invoice are created from these partial delivery notes.

See how it works:



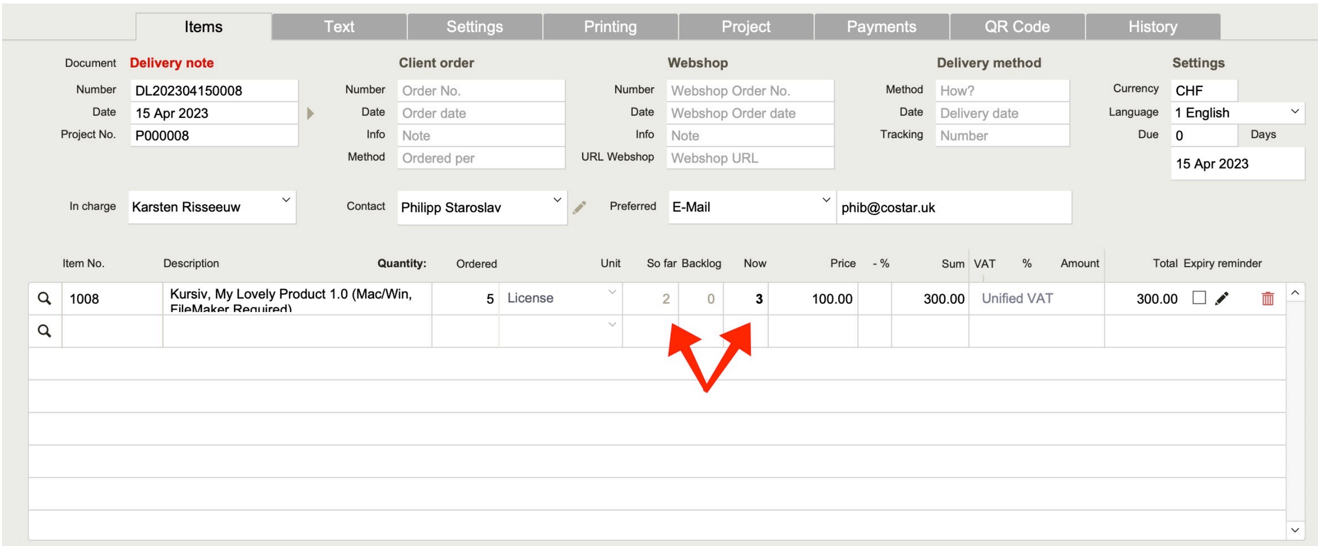
In this screenshot, 5 items have been ordered, but "now" only 2 items have been delivered. This immediately creates a backlog of 3 items, clearly visible in the same line. You created a partial delivery note.

Now create an invoice from this delivery note:

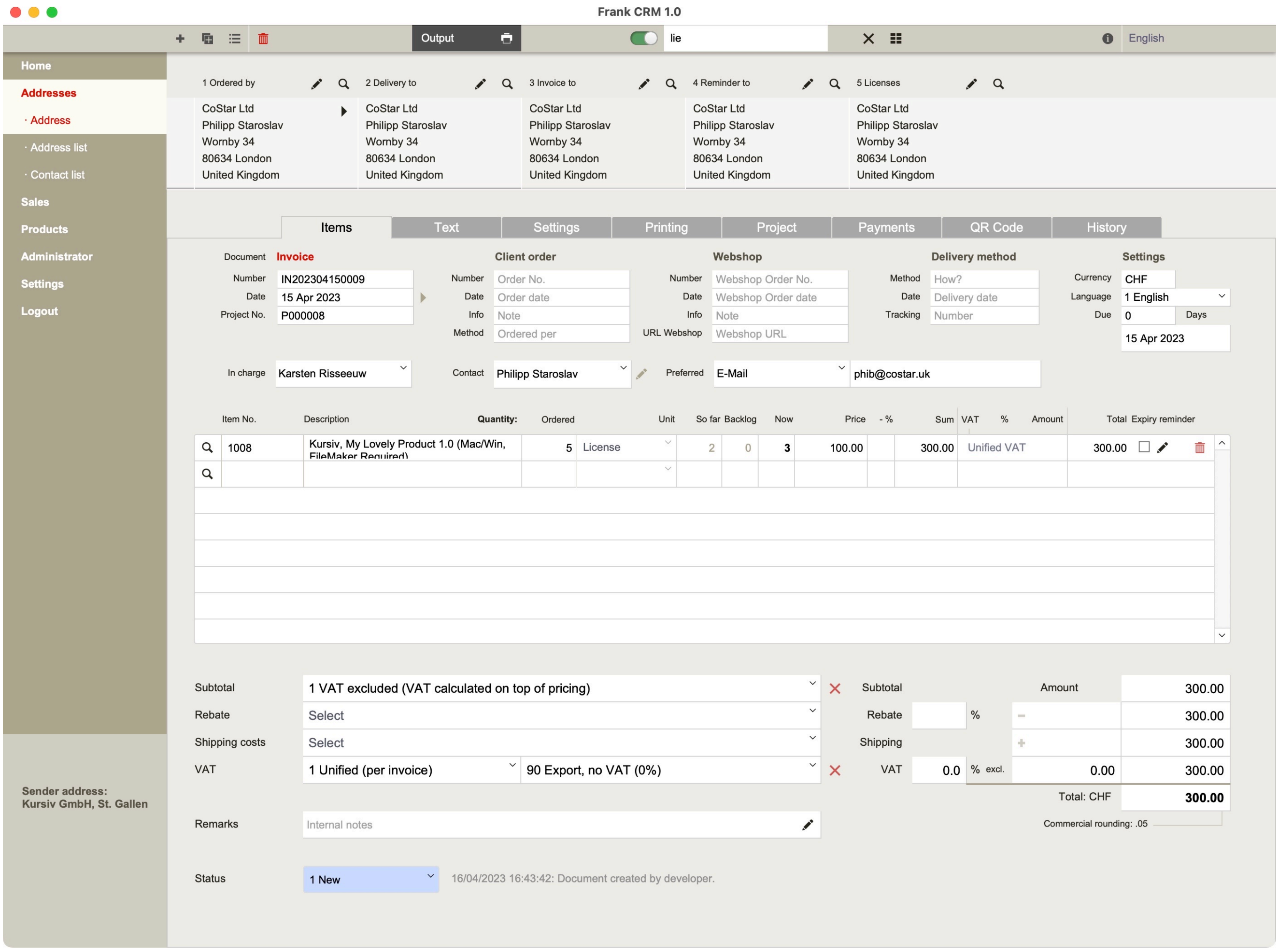


The invoice has the same numbers in "now", which are used for the partial invoice.

When the rest of the ordered items can be delivered, switch to the latest delivery note (the first partial delivery) and duplicate that delivery note to another delivery note. You will see that the items on backlog are found in the field "now", while the previous delivered items are in the field "past". This function assumes you want to deliver everything on backlog. If needed, you can again send only a part as "now".



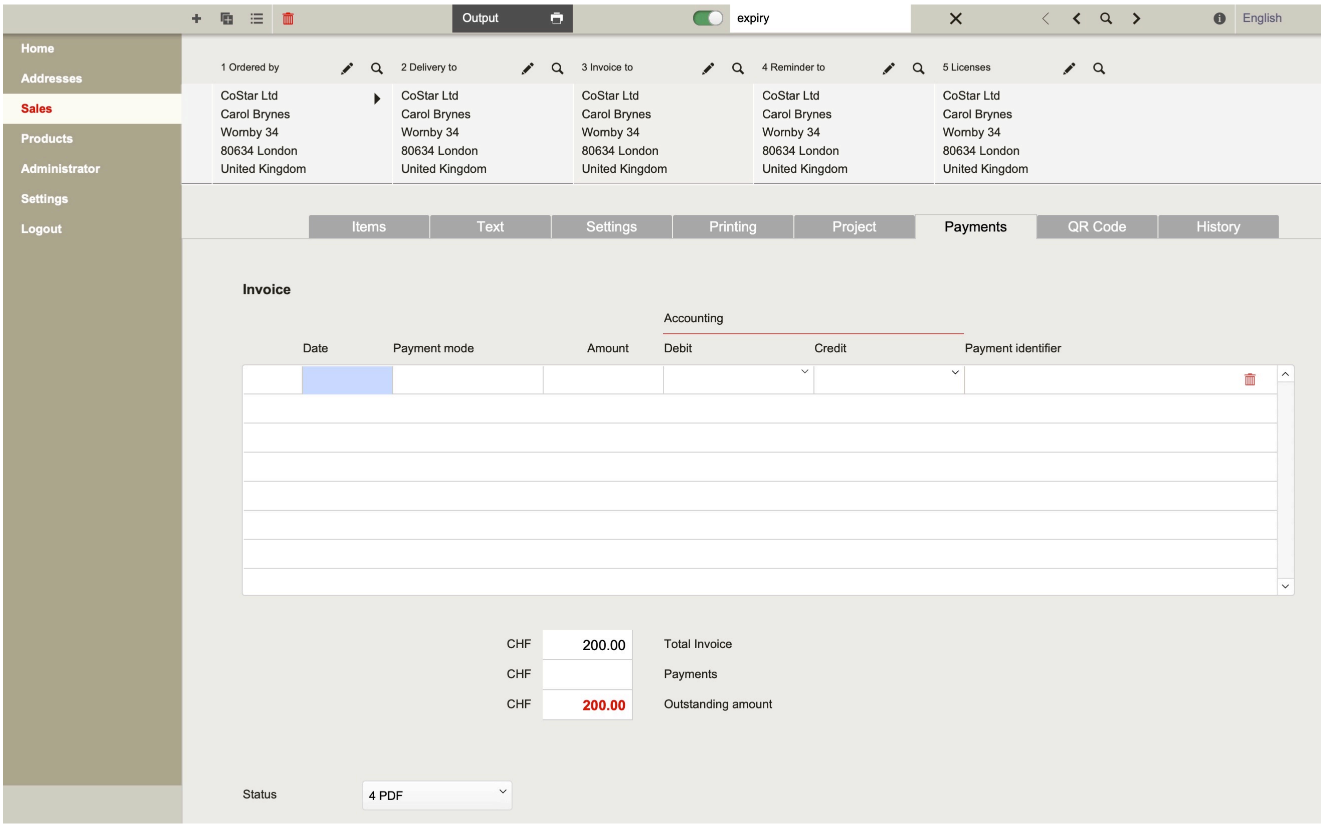
From this second delivery note, you can create the second invoice.



Payments

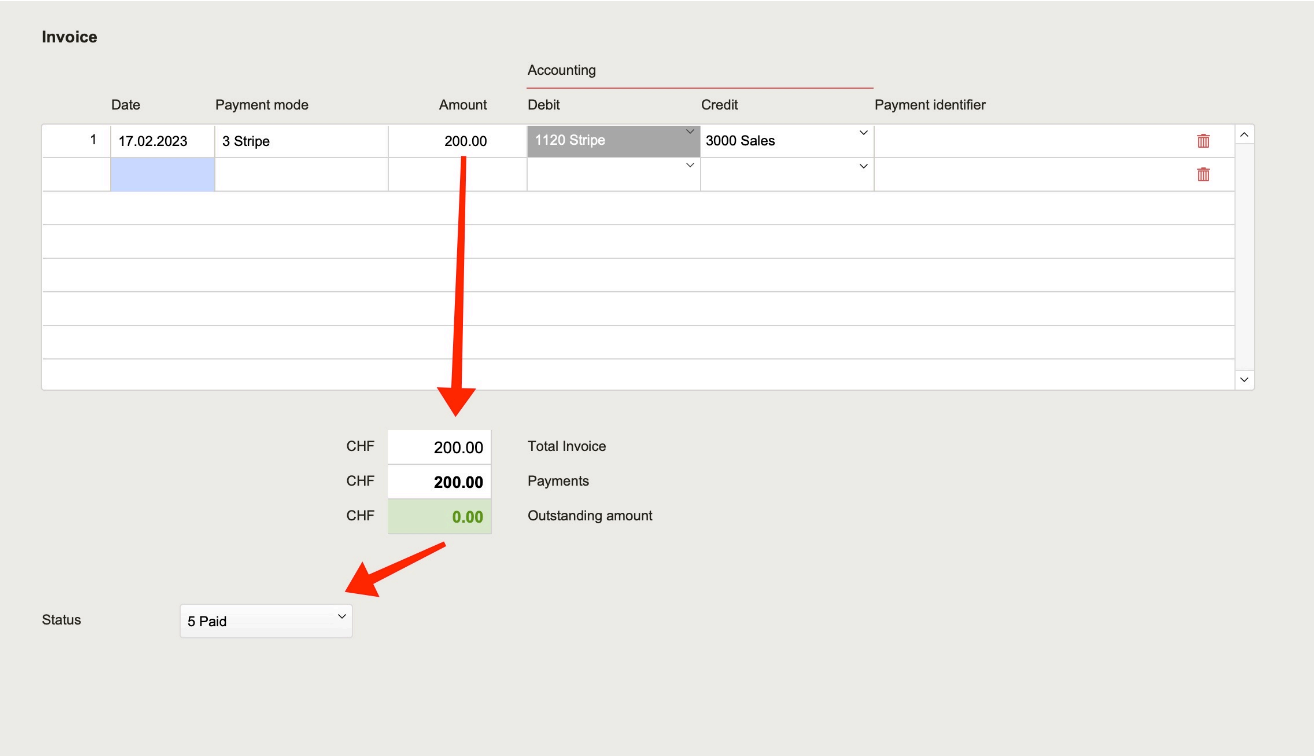
Keeping track of payments

Incoming payments can be linked to invoices sent. To list payments for an invoice, go to Sales > Payments.



The tab "Payments" belongs to the sales document. You see a list of payments, as a single invoice might be paid with several installments. Click on the blue field and enter the date of the payment. Then fill out the rest of that line.

If payments are complete, the "Outstanding amount" should be 0 (zero). Then **manually** switch the status to "Paid".


Invoice
Accounting
Date
Payment mode
Amount
Debit
Credit
Payment identifier
1
17.02.2023
3 Stripe
200.00
1120 Stripe
3000 Sales
CHF
200.00
Total Invoice
CHF
200.00
Payments
CHF
0.00
Outstanding amount
Status
5 Paid

Products

Products

Products are the basis for your invoices. Here you create

- Item numbers
- Item descriptions
- Item price calculations
- Item prices in all currencies as defined

What are products?

Products are from a certain supplier. Let's see how that works.

What is a product?

- Let's assume that you are a musician and teach students, then you are the supplier and your product is - for example - a single hour or a course. It can also be a monthly fee or something else. For each of these basic prices and modes, a product should be added to the Products.
- If you are a garage owner and repair cars, you will bill both your time and spare parts. In a single invoice, there might be products from several suppliers: Products from your company, parts from other companies, etc. Your time would be a product by itself (unit might be: hour) and spare parts could have a generic item description without a price. When adding a generic item to your invoice, you can overwrite the description with the spare part and add a price to it manually. This way you avoid defining an endless list of products, while you maintain flexibility. Of course, you can list often-needed parts (like: oil) as a fixed item with a fixed price. That's up to you. Create an address for each Supplier if you intend to list products from a specific source.
- If you sell software licenses as a service, you might want to put that subscription in a product. The unit might be: year. This product can now be added to an invoice and in the invoice, an expiry date and date to remind can be added in the item details of an invoice. This way you can check on expiring items and send out reminders or create new invoices. The supplier can be you, your company - you name it.

Products are linked to suppliers and will derive some information from the supplier. All products listed are visible under the address of the supplier, under the tab Address > Supplier > Products. Click on any of the listed products, and you will switch to the product layout for editing.

Before you start

Please make sure to first add some currencies to FRANK CRM. This will help to streamline your product pricing.

- Create currencies first

Create currencies first

Products have prices attached. You need to assign at least a single currency. The suggested approach is to integrate currency conversions. If you only will handle a single currency, you also could set your basic currency manually. Both options are explained below.

1. Multiple currencies

Adding currencies first

To work with prices, it is helpful to add the API-key of freecurrencyapi.com to your settings > Currencies.

There are 3 steps involved in adding currencies:

1. Add your API-key.
2. Create a list of all currencies (just click the button) and
3. Add every currency you intend to use.

How prices are used

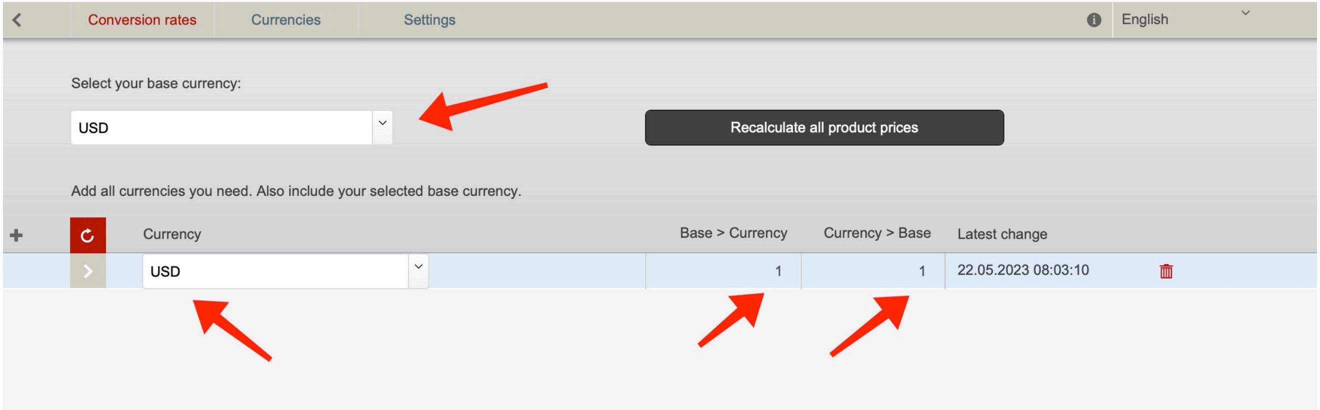
When creating a product, new price records will automatically be added, one record for each currency. In the sales documents, changing the currency will automatically update all prices in the document, reflecting the pricing for that specific currency.

2. Single currency

If you only use a single currency

You might not need additional currencies. That's fine. If that is the case, you do not need an account at freecurrencyapi.com, nor do you need an API-key.

However, you must create a record for the currency you want to use. For example, if you live in the United States and you will never ever sell something in a different currency, you can set up a single record for US Dollars. Switch to Settings > Currencies > Conversion rates to see the following screen:

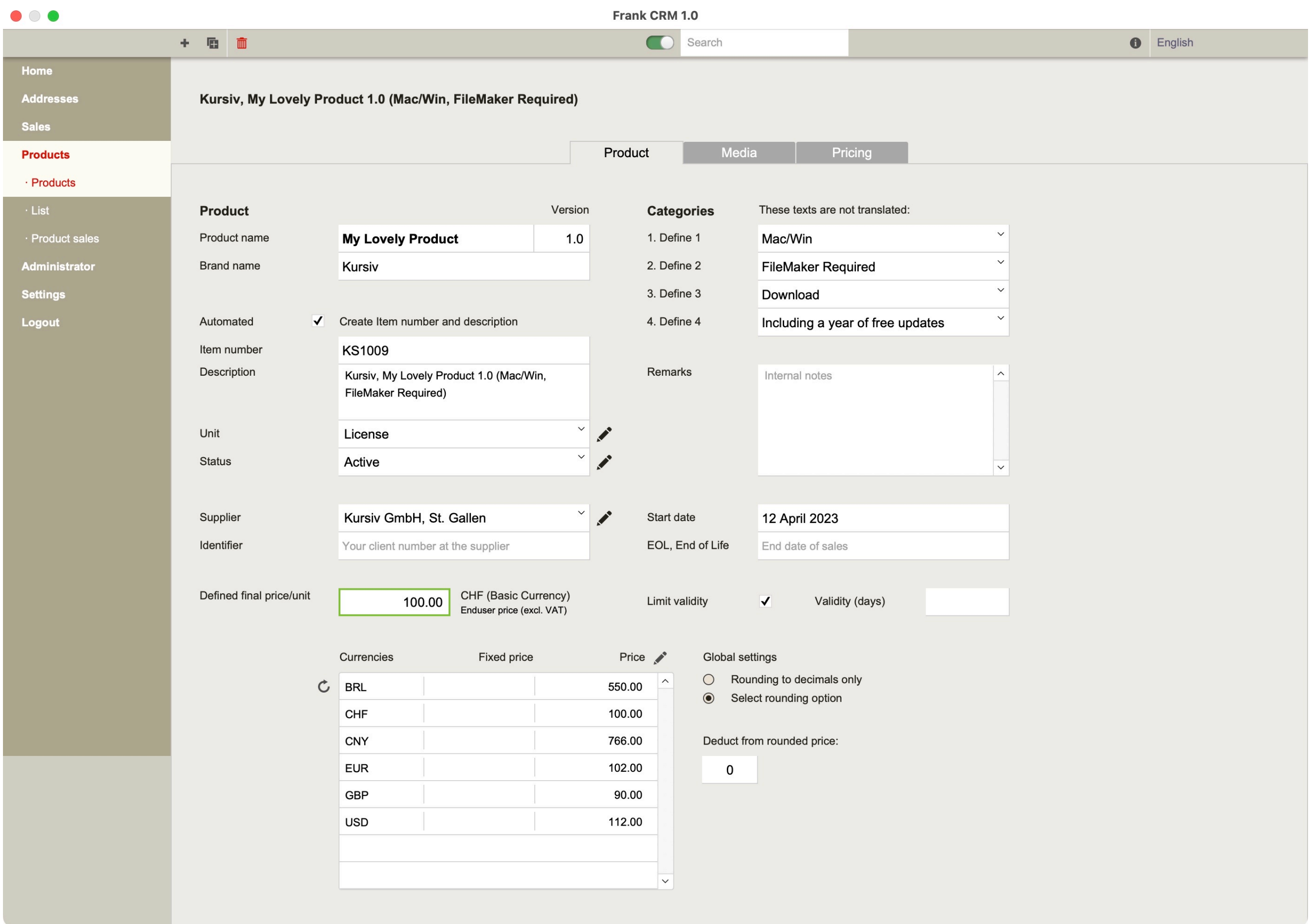


If you have no API-key, you must write the currency code manually and cannot select it from the list. First click on the "+"-Button to add a record, then set the Base Currency and the Currency to the same Currency Code and add both conversion rates as "1" (One). That's all!

Note: You can only write a Currency Code manually if there are no values in the Currency List ("Currencies"). Use the official 3-letter code (ISO 4217) and no special characters.

Product Details and pricing

The layout for Products give you all the details linked to that product.



Enter basic information

The first tab is called "Product". Fill out all the fields which are fitting.

- Name
- Version (optional)
- Brand (website, platform, brand name - anything)
- Item number and item description
- Unit
- Status.

Automate item number and description

You can write the item number and description by hand. You can also automate this information. If you activate "Automated", the item number and description are generated according to the rules as you can define under Settings > Products. How the item number or description should be formatted and with which information, can be defined in the settings. If you change the definition, you will be asked if you'd like to update the description for all products.

Automated item numbers and descripitions rely on information you enter for each product. Important: Start adding Categories on the right side. You can name the categories under Settings > Products. This information is used to create the product description. This is quicker, easier and more consistent as adding everything by hand.

Product categories

Product categories help you to create different product descriptions with ease. In each of the category fields you can simply write your description. As soon as information has been added to any of these fields, this information will appear in a popup list for that field, which makes it extremely simple to add the same information to other products as well.

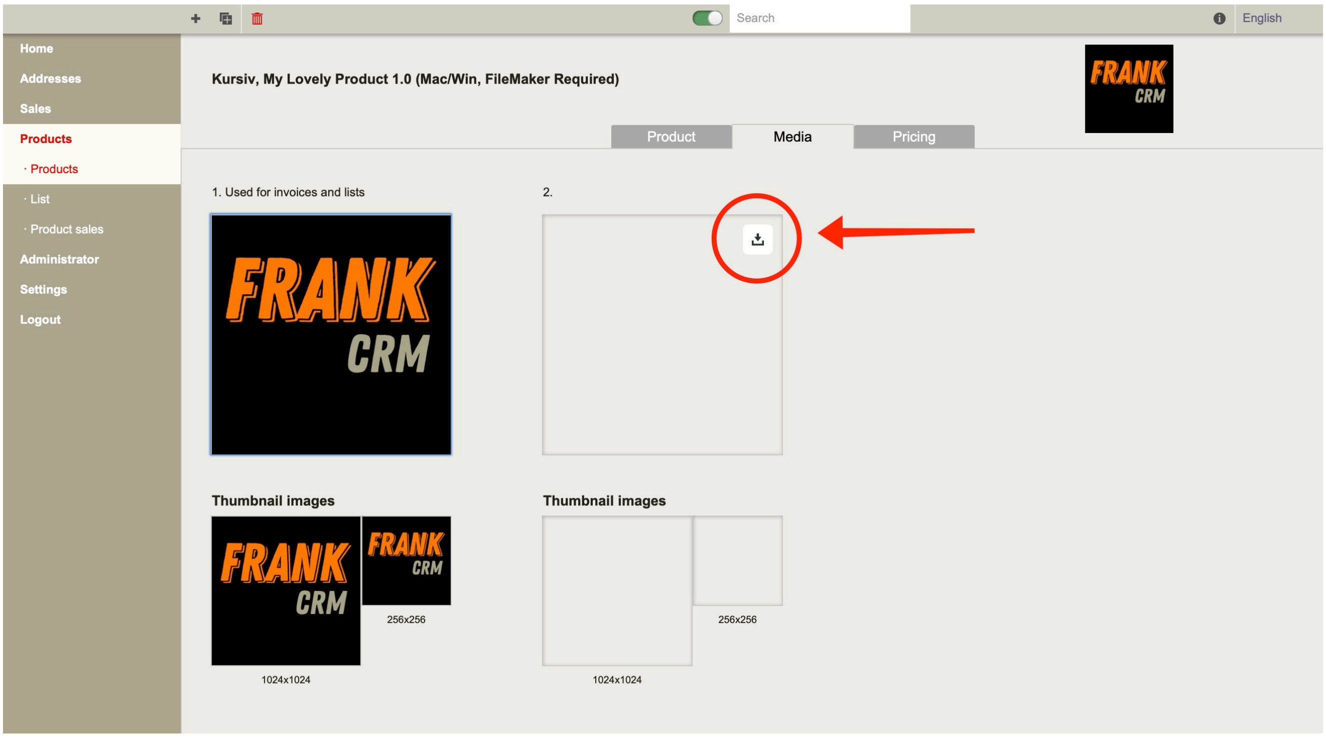
Four categories can help you create about any variety of description. Think of each category as a specific group of information, like:

- Category 1: Mac, Windows, Linux, Cloud based
- Category 2: English, Spanish, Multilingual
- Category 3: Including updates for 1 year, Not including updates.
- Category 4: Black Friday Special, Summer Sales Special

You get the idea. Use these categories as is best for your products. If you are unsure how this works out, create a few products, and see how categories affect the product description. There is no need to use all 4 categories. You can adjust the order and what is visible under Settings > Products.

Product media

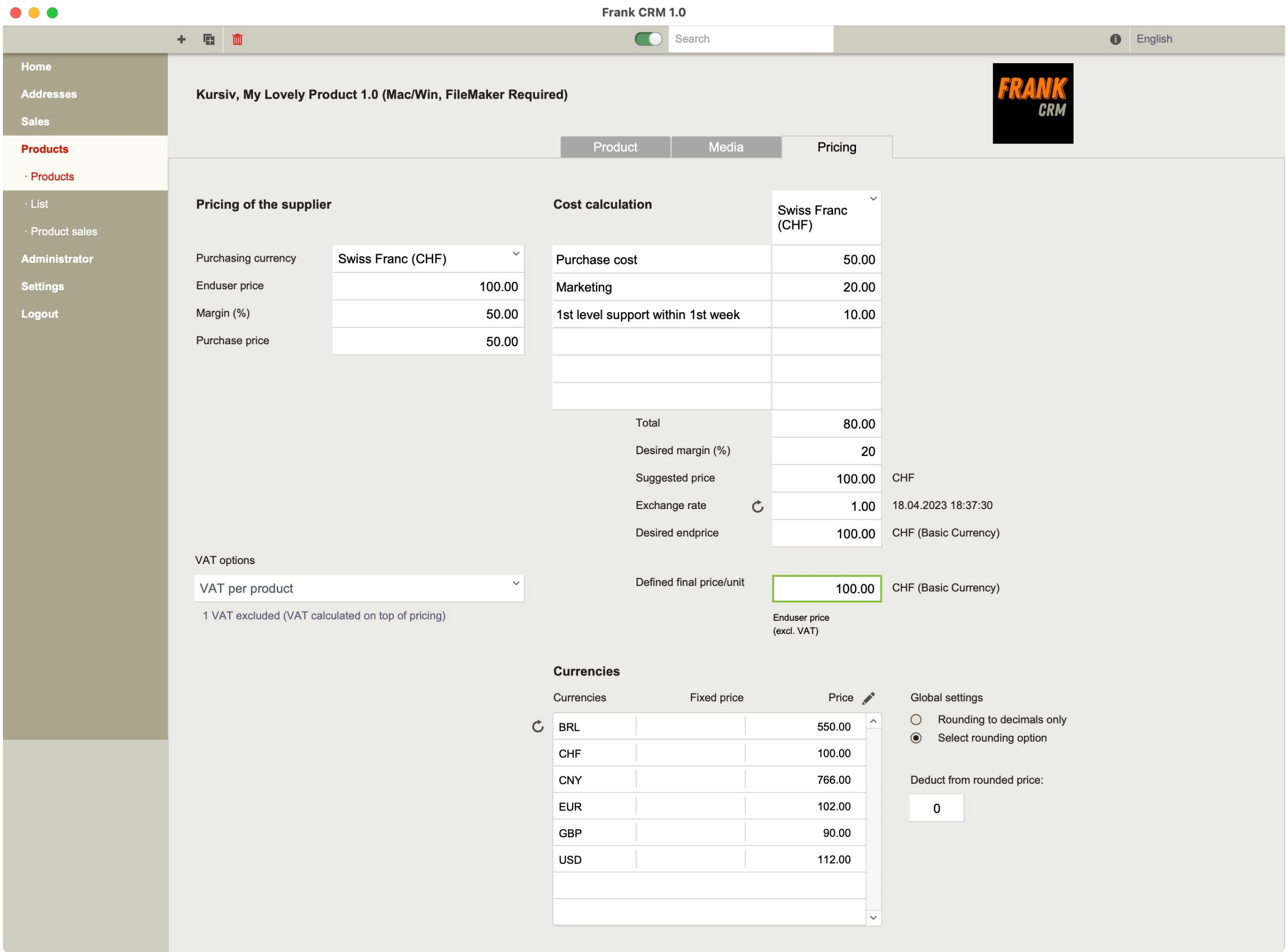
The tab "Media" offers two slots for images. The first image will be used for display on sales documents. Click on the button as visible on an empty field to add an image. The thumbnail images are created automatically from the uploaded image.



Tips: Preferably use square JPG images. The imported image can be any size. A square image is best displayed on a sales document. The small thumbnail is used for lists.

Pricing

The tab "Pricing" has all you need to manage your prices.



How to manage prices

There are 3 steps for the correct pricing for your products. Before you start, make sure to have added currencies first.

1. **Left side of the screen: Supplier price.** Start by adding the enduser price of the supplier. Add the currency you are billed in, add your margin and see your purchase price.
3. **Right side of the screen: Cost calculation.** Select a currency for your calculation and list the costs for every expense you have. Add your desired margin and see the suggested end price in the calculation currency. The exchange rate takes this suggested end price and turns it into the desired endprice in your base currency. Manually add the

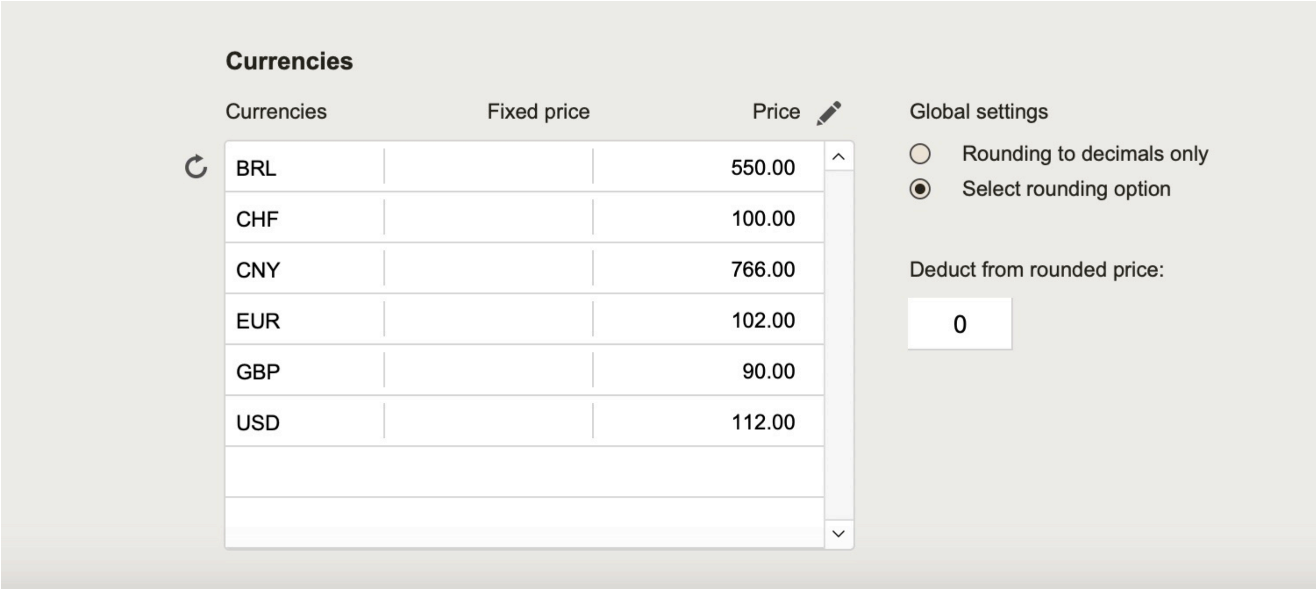
desired end price in your base currency. This is like the starting point for all currency conversions.

4. **Lower part of the screen: Currencies.** You must have currencies defined first to show them here. If you defined currencies and have no records in the table under "Currencies", click the refresh button at the left side of the table. All currencies appear, as are the automatically generated conversions for each currency. These are your base prices for each currency.

Fine-tuning prices

Once you have your currencies listed and all base prices available, you can start the fine-tuning of these prices. There are two options:

1. **Fixed price:** If you need a fixed price to overrule the base price, just enter the fixed price for each currency. This will be used.
2. **Rounding:** Standard rounding is to 2 decimals, without further changes. Alternatively, you can select a rounding option. If you do, more options appear. Test the values from the popup menu "Deduct from rounded price" to see how it works. You can add your own values to the popup menu if you want to change something. This last setting will harmonize the look-and-feel of *all* your prices (it's a global setting).


Currencies
Currencies
Fixed price
Price
BRL
550.00
CHF
100.00
CNY
766.00
EUR
102.00
GBP
90.00
USD
112.00
Global settings
Rounding to decimals only
Select rounding option
Deduct from rounded price:
0

Reporting

Reporting

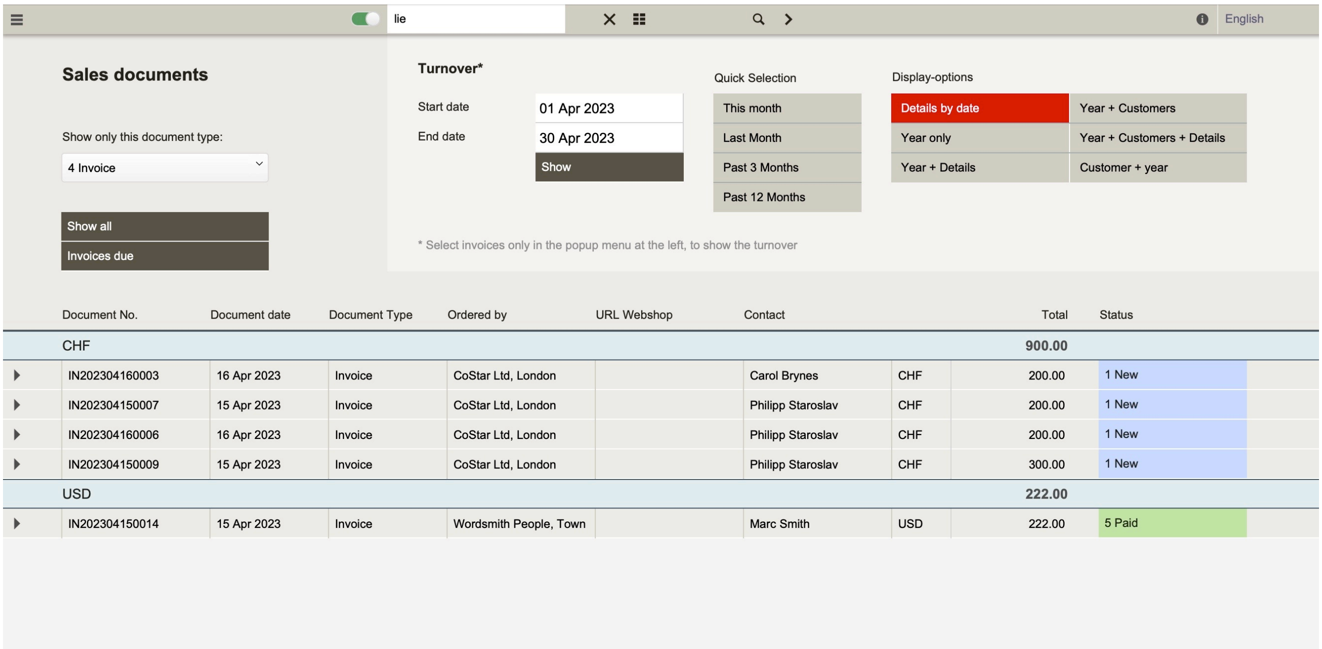
See how you are doing. Sales are important. Get the latest figures and feedback on developments here.

Turnover

Every business owner wants to have an eye on turnover.

Learn from your sales

With FRANK CRM, nothing is simpler as showing your turnover. Click on Sales > Lists.



When entering this layout, the current month is presented, with all invoices as created in this particular month. The list is sorted per currency and shows the totals per currency as well as the related invoices.

Use the buttons on this layout to create different lists:

- Document types
  - Click "Show All" to show all documents of all document types
  - Select the document type you want to see in the popup menu.
- Select a date range
  - Use the date range to limit the results
  - Use any of the predefined searches (this month, last month ...)

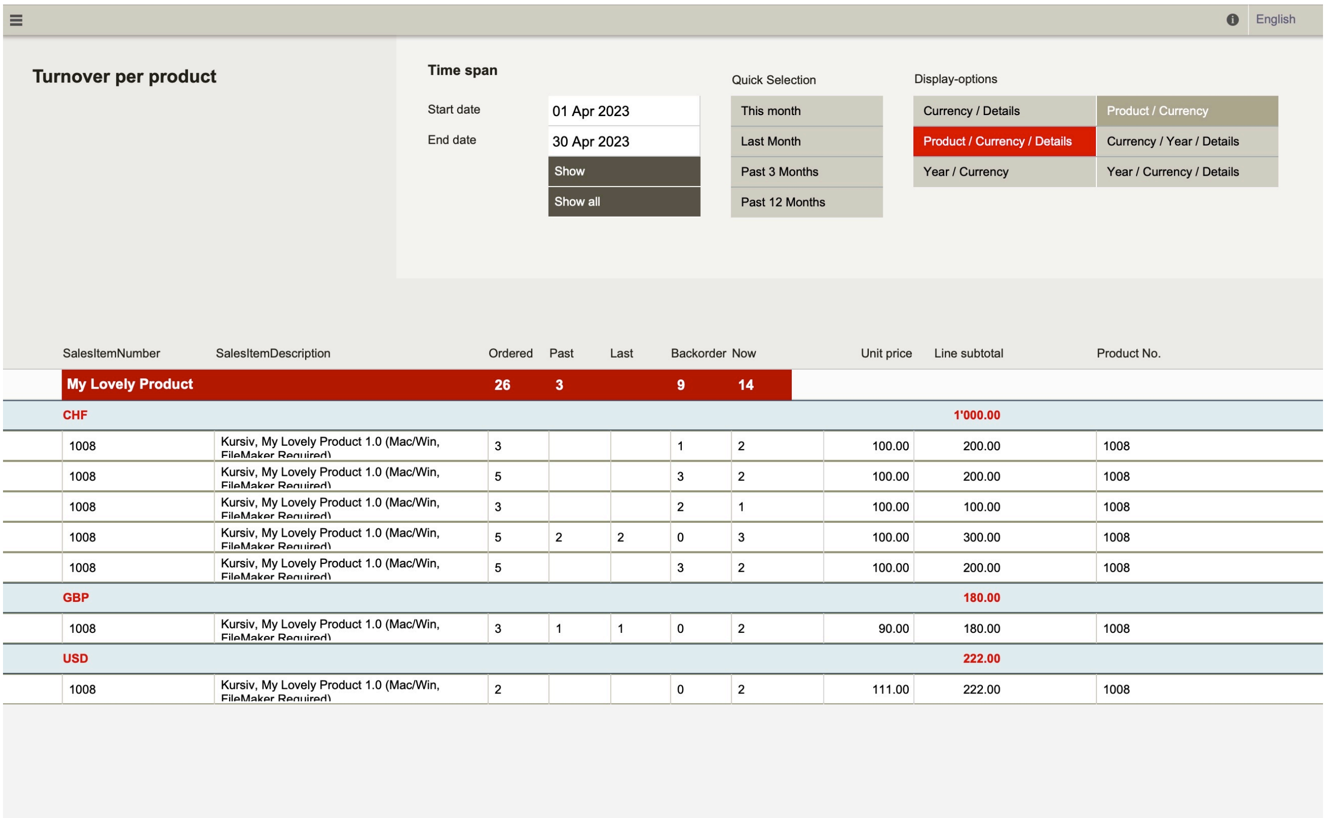
    - Define any other search by changing the start and end dates
- Sort the results
    - Use the sorting options to show or hide specific information
    - 6 sorting options give you 6 different lists

Turnover per product

Do you want to know how well certain products are doing? Look to turnover per product.

How well are certain products doing?

Sometimes, products aren't doing very well, Others are booming or doing better over time. Sometimes products do well in certain markets only (reflected by currency). It is easy to show the sales per product. Find this function under Products > Product sales.



This list will give you the turnover for the selected period, sorted per currency. Change the view on this list by selecting from the sorting options. There are 6 views to this list.

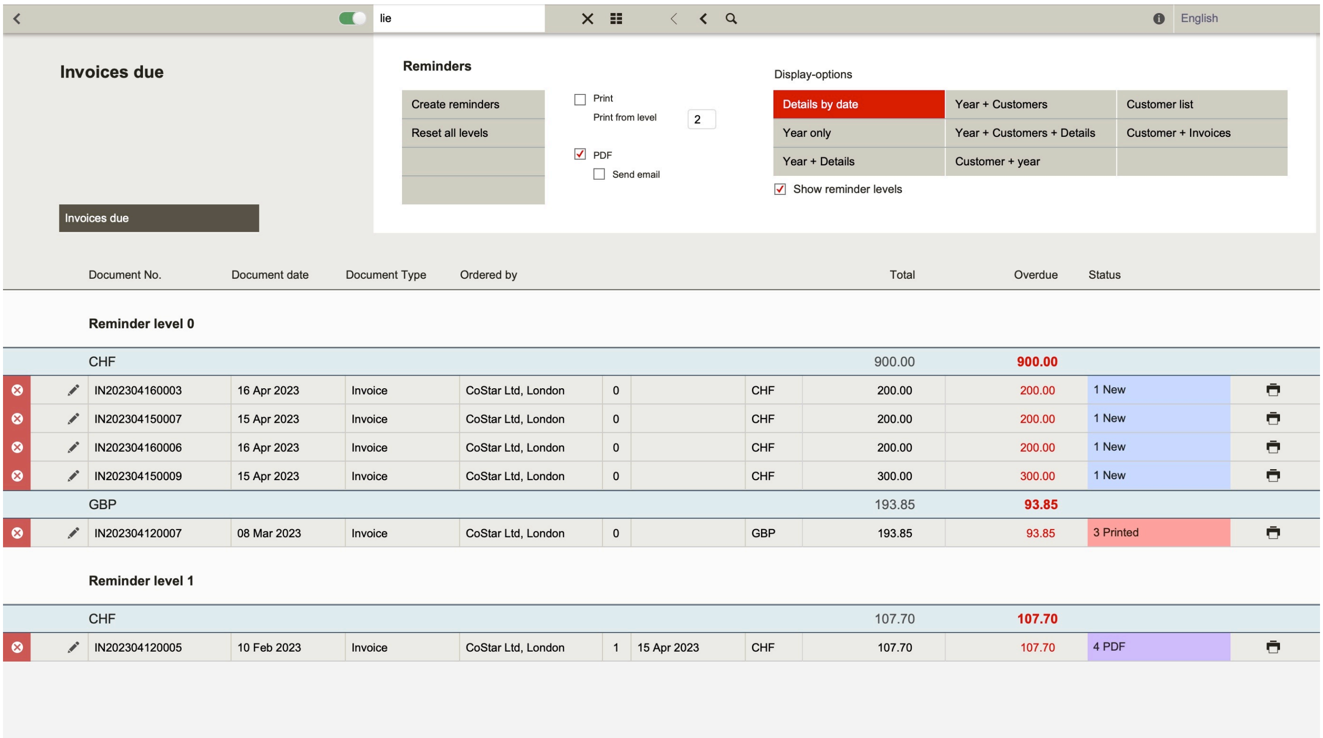
Invoices due

Being paid is essential to business. If you rely on invoices to be paid, it is a must to have an overview of unpaid invoices at any time.

Invoices due

FRANK CRM gives you a list of all overdue invoices with a few clicks. There are two options to get to this list:

1. In the left navigation, click on "Invoices due"
2. From Sales > List, click on the button "Invoices due"



Standard setting

When entering this layout, a standard result with all invoices overdue are listed. This list is first sorted per currency, then according to the single invoices. Just as with the Turnover list, you can sort this list using the functions at the top right. Each sorting will give you a different view of this list.

Reminders

From this list, reminders can be generated automatically. To exclude certain invoices, click on the red (X) button at the left of each line. That line will then be excluded.

Single reminders or batch processing

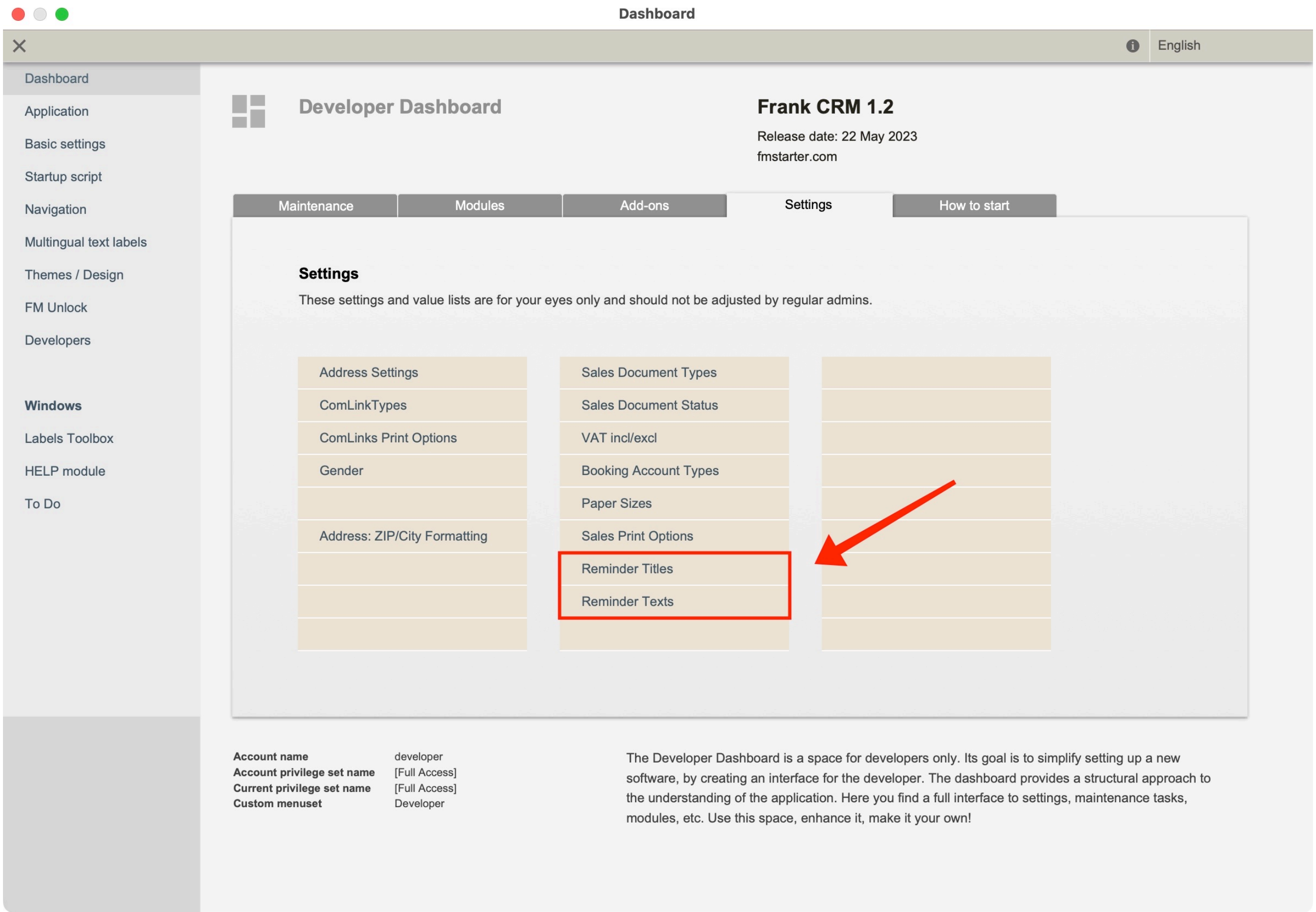
Reminders can be sent out per line or per batch. The printer symbol at the right end of each line will create a reminder for just that invoice. To process all lines at once (batch processing), use the functions at the top of the page, above the lines.

The text of each reminder will be in the language as set for the original invoice. Your interface might be Japanese, but if the invoice was in English, the reminder will be in English as well.

Reminder levels

Each invoice starts with reminder level 0 (zero). Once an invoice is overdue and a reminder is generated, you will be asked if you want to raise each level +1. By doing that, each reminder is at a new and higher level. The reminder level will influence the texts, which are written.

Texts can be edited easily in the Developer Dashboard, as accessible through a purchased full version:



These are the implemented levels:

1. Friendly reminder
2. Second reminder
3. Last reminder
4. Internal note: Start "Order for Payment"
5. Internal note: Start "Debt Collection"

These reminder levels and settings can be adjusted in the full version of FRANK CRM.

Print or PDF?

When batch processing, you can define if the reminders will be printed (and from what level on), if PDFs should be created and if PDFs should be sent to the defined email addresses (as indicated on the invoice).

You might want to send the first friendly reminder per PDF and email, but any higher level should be printed and sent per post. Or both.

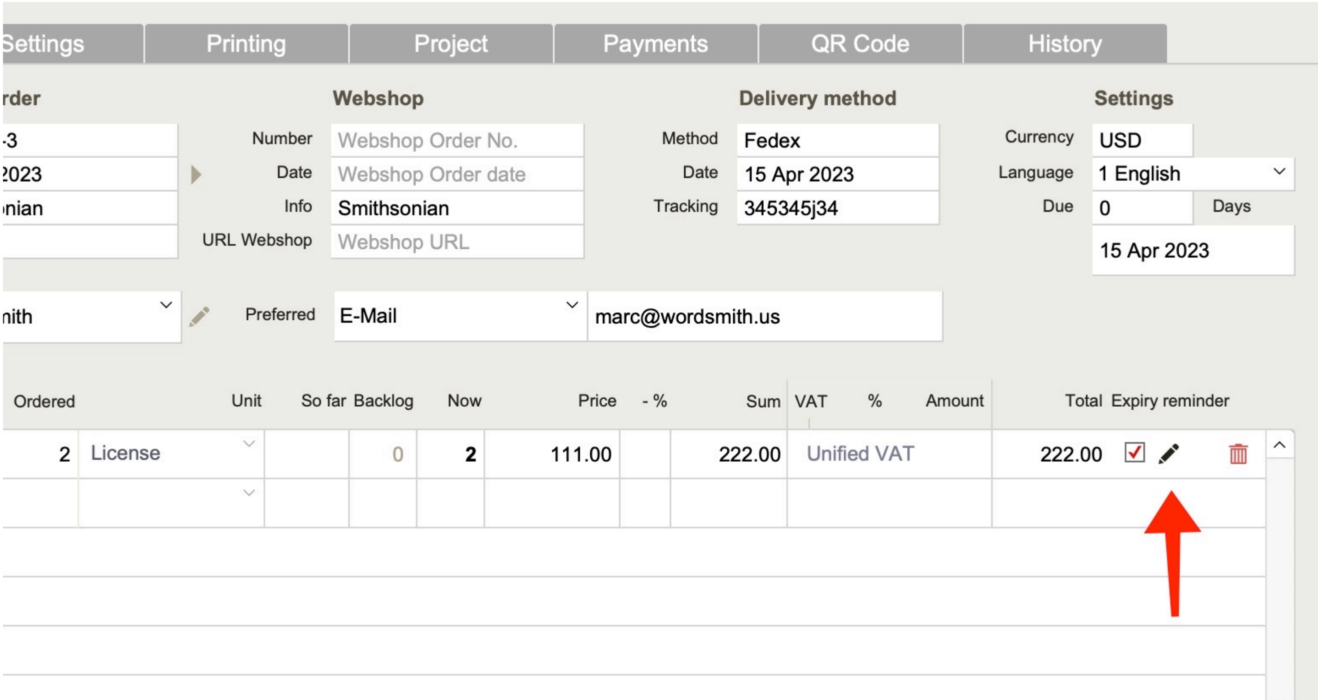
Expiring items

Managing services and subscriptions

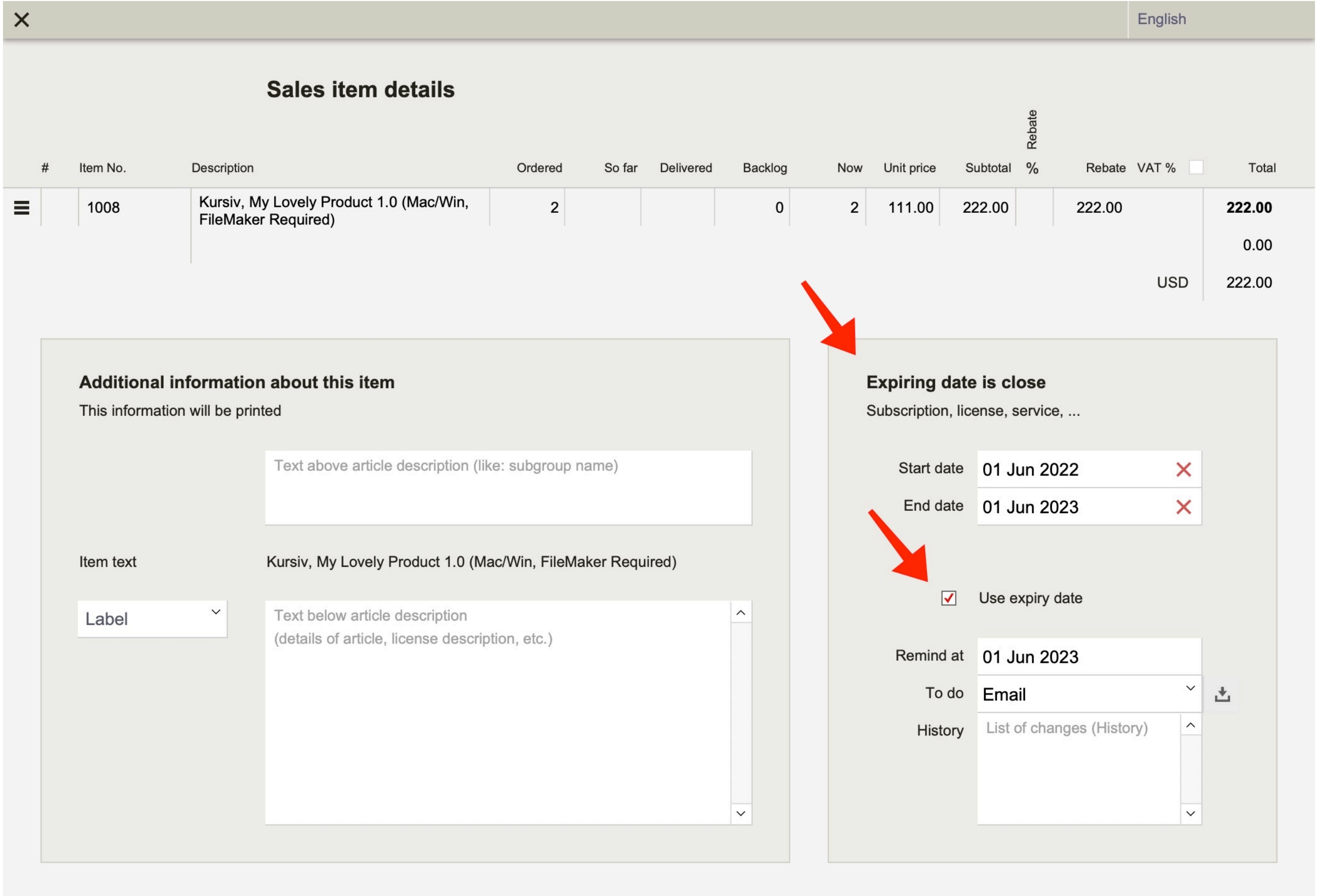
Many services and licenses today are created as subscriptions. That is why you probably need to keep track of these expiring items.

Setting expiry dates

Expiry dates can be set for single items in an invoice. In the invoice, click on the "Edit" symbol in any line.



This opens the Sales item details screen:

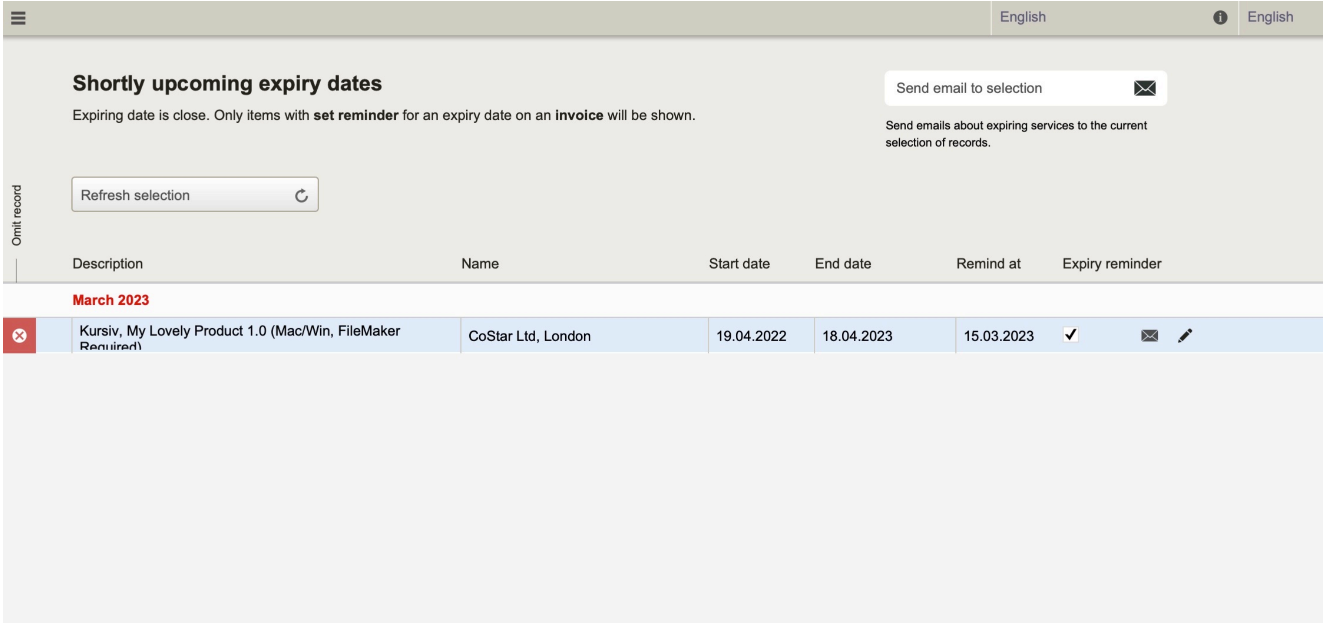


You can list the start and end date as simple information. If you want to have these days printed on sales documents or if you would like to be able to find this item in a list of expiring items, you need to activate "Use expiry date". This will do two things:

1. Start and end dates will be printed on any invoice.
2. The information is also used to create a list of items "soon to expire" in FRANK CRM.

List of expiring items

A list of expiring items can be found under Sales > Expiring.



This list can be used to send out emails to clients, for example to remind them of an upcoming automated renewal or to remind them of the upcoming expiration date of a license or service.

Which items should be processed?

As on the layout for payment reminders, it is possible to **exclude single lines** from processing. Click on the red square with (X) to exclude an item from the list.

Sending e-mails

You can send the reminders of an expiring item either as a singe **single email or in batch processing** for the current selection of records. The button to send out a single email can be found on each line of an expiry item (envelope icon). The button to send out the entire batch of records is found above the lines.

When an email is created, the history of that event will be set. Also, the checkmark "Use expiry date" will be removed, as you just created the reminder. This item will no longer appear in a list of items soon to expire. If you wish to change that, you need the full version of FRANK CRM.

Emails will be generated and opened in your personal e-mail application. No emails will be sent automatically. You must confirm each e-mail. This also enables you to add some text.

The standard text looks like this:

--

This is an automated reminder about an item which is about to expire

---

Dear [Name of customer]

Shortly, the following item will expire:

--

Order reference:
Ordered by: [Company]
Invoice: [Invoice number]
Order date: [Order date]
Client order: [Client order number]
Online order number: [Online order number]

Item:

[Product description]

Start date: [Start date]

End date: [End date]

--

[Some license details, if any]

--

Kind regards,

[Your Name]

Related addresses

Ordered by:

[Order-by address]

Invoice to:

[Invoice-to address]

[5th address]:

[Address-type as defined]

--

Remarks

1. Be aware that these lines do not represent invoices, but single sales items. In case a single invoice has multiple items with expiry dates, each item will be dealt with separately.

2. Email texts will be in the language of the original sales document. Thus, if the invoice has been issued in Spanish, the reminder about an upcoming expiry will also be in Spanish.

Administrator

Administrator

The administrator is a single account in the free version of FRANK CRM. An administrator is a user belonging to the group "Administrators". An administrator has access to all pages and layouts, can create other users (in the full version) and has extended rights.

It's a super-user!

What is an administrator?

Managing FRANK CRM

An administrator is a special user with more rights than a regular user. If you are the only one having access to this solution, choose to be an administrator. If several people have access, you can create additional accounts and assign users to specific user groups.

Attention: The free version only supports a single administrator, and it is not possible to create other user accounts. To create more users, you need to purchase a full version of FRANK CRM.

An Administrator is a user assigned to the user group "administrators". Other users might have been assigned to another user group. In a full version, you can create your own user groups, with their own privilege rights.

These are some differences between Administrators and other user groups:

- An Administrator will usually see all available layouts. Other user groups might only see part of the layouts.
- An Administrator will have more rights as a user, but fewer rights as a developer. Developer access is only available in a full purchased version.

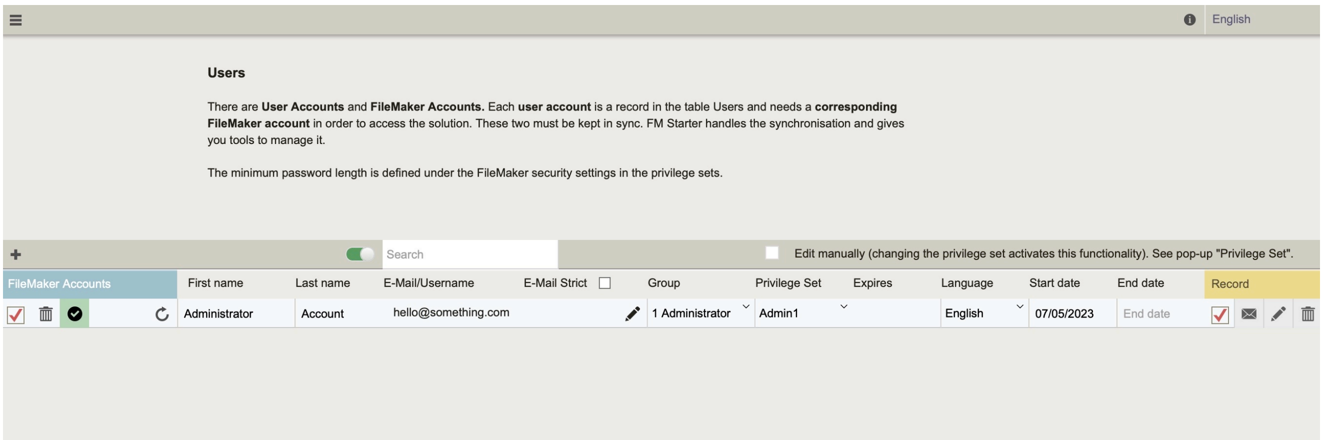
Users

Get everyone its own access details and rights

Users are system users, which are not developers. In the free version, only a single user account with the role of an administrator will be available. It is not possible to create more users in the free version.

All users have

- private login details
- a user group assigned (with possibly their own set of accessible pages)
- a privilege set assigned
- a language assigned (one of the available languages)
- a starting date and end date for accessing the application.



Each user can be sent an e-mail with access details.

FileMaker Security and User Accounts

The User Account module in FRANK CRM is the same as in FM Starter and relies on the Filemaker security options. The User Account module offers an interface to the FileMaker security options. This includes the login screen and all settings as shown above. Other options, like assigning a language or user group to a user, or setting a start date and end date, are unique to FRANK CRM and not available in the FileMaker security options. Managing users in a table has the possibility of adding more functionality to user accounts.

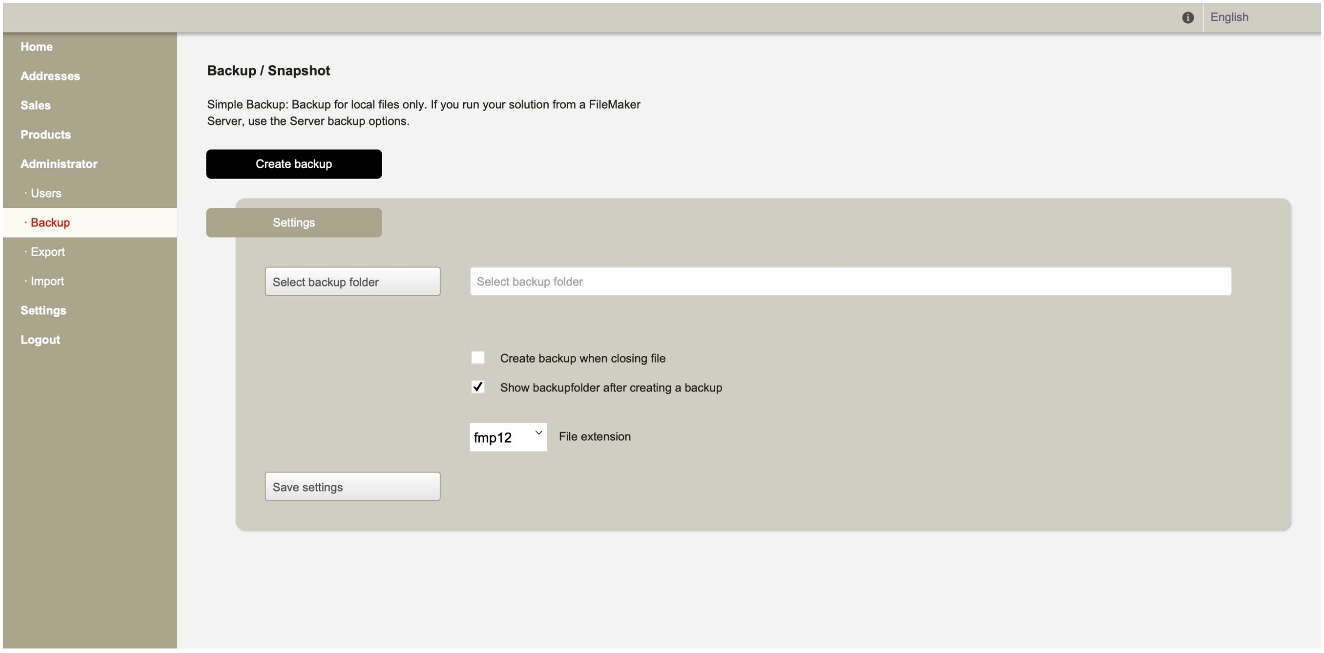
To make it more secure, select a user group with an expiring password for each account, that requires the user to create their own password at the first time logging in. All this can be managed from within the user table, but the basic security settings, privilege rights and more have to be set up by the developer first.

Backup

Create snapshots of your local files

The module "Simple Backup" will allow you to create snapshots of FRANK CRM if working on a local computer.

Click on "Settings" to open the settings part, where you can create or edit your settings.

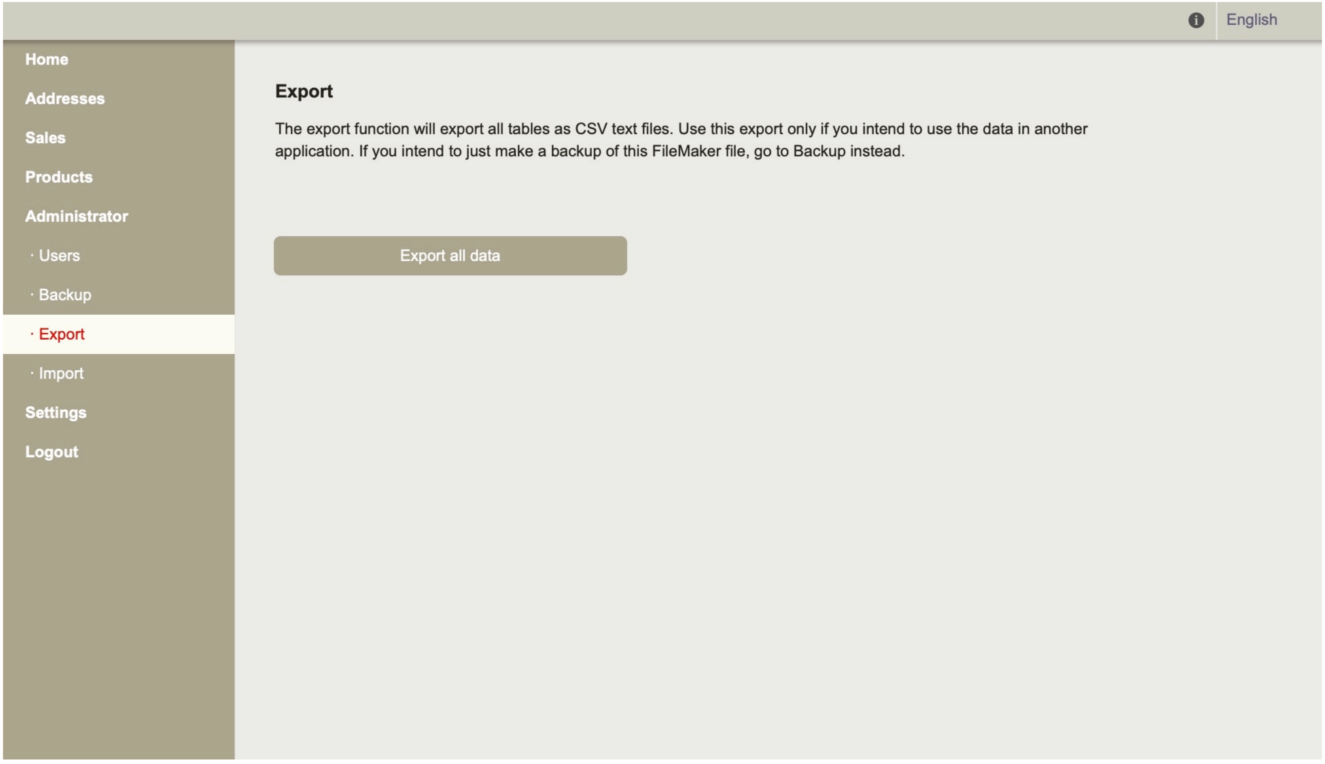


The backup module will create a backup of your current file with a timestamp added to the file name and in a directory of your choice. Delete the backup folder path in the settings if you want to create a new path (you will be asked to select a path when you create a new backup).

Export

Export all your data with ease

Your data is yours. That is why you have an export option in FRANK CRM. Click the Export button, and for each table in FRANK CRM, an export file in CSV-format will be created.



Exporting data is not the same as a backup. Exported data is meant to give you all your data, in case you want to import that data into another solution, which is not FileMaker. A backup, however, is a simple copy of your current File-Maker file.

The export files will be created in a location of your choice. Each export will first create a folder with a time stamp. To that folder, all files will be exported. Try it!

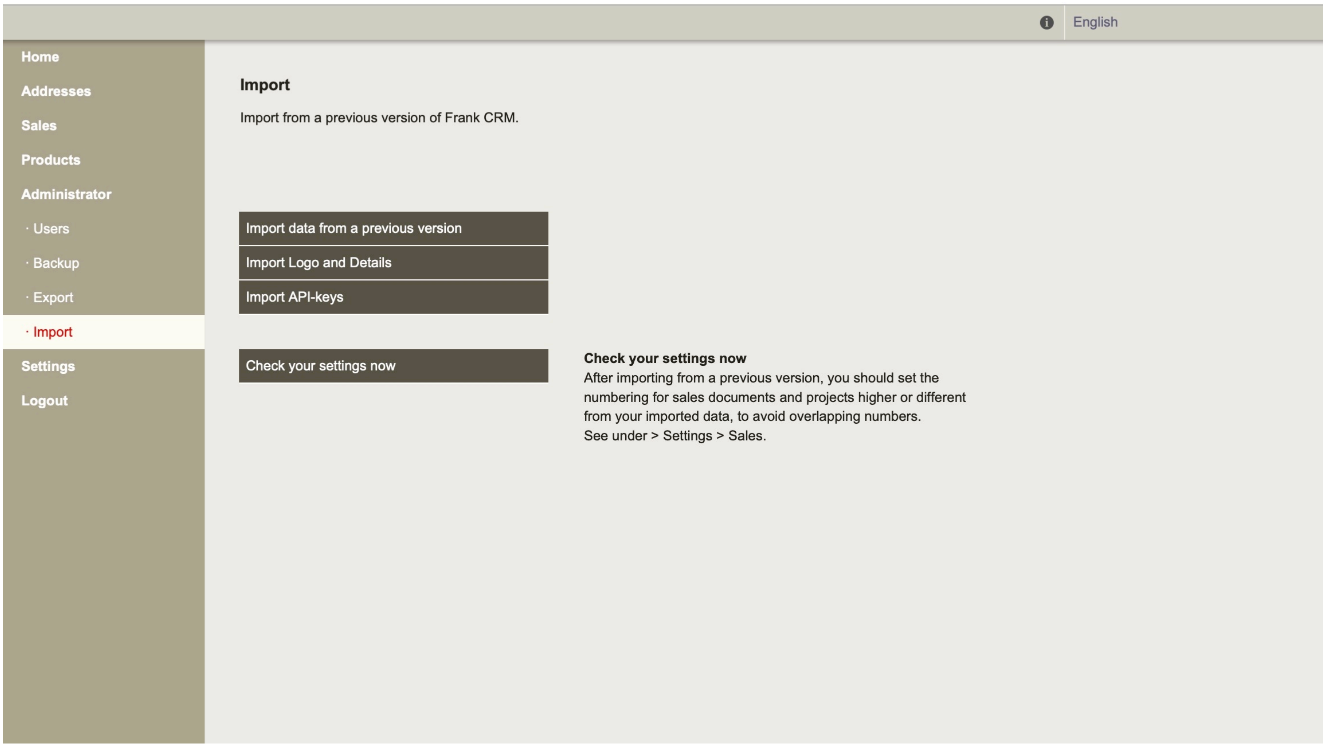
Import and update

Get your data from an older file

The import function is an **update** function, by which you can update from an older to a newer version of FRANK CRM. It is not a generic import function from any other data source.

Import from an older version of FRANK CRM

The import function will import the data of an older FRANK CRM file into the current file. You use this function, if you have an unchanged copy of FRANK CRM and want to use the latest version. You can then open the new file, switch to Administrator > Import and click on "Import". Furthermore, you will then be asked to locate the older file. After confirmation, you will be asked if the data in the newer file should be deleted (default: delete). Then all data will be imported from the older file into the newer file. The older file stays untouched.



Important

After importing, carefully check your data and settings. Tip: Create a backup of your older file and do no longer use the older file (renew shortcuts on your desktop).

Import from other external sources

Can you import from other data sources? Yes, but you need a full license. If you have a full license, you can import with all methods FileMaker offers.

The ready-made script as mentioned above only works for previous versions of FRANK CRM. It is not possible to use that script to import data from other sources.

Import is not enough!

Importing alone is usually not enough, as data must be harmonized to work in FRANK CRM. We suggest that any strategy to import data from another system is carefully developed by implementing it in repeatable scripts.

Import from KIM Office

KIM Office is an earlier administration software made by Kursiv. If you are working with KIM Office, we can help you to transfer your data. Be aware, though, that KIM Office had many options which are not available in FRANK CRM and vice versa.

FRANK CRM is a modern, versatile solution developed for growth, but it is kept to a generic set of features and tables to fit more scenarios. Moving your data from KIM Office is only possible for the matching data and concepts in both solutions. Send a request to support@kursiv.com, then let's talk.

Settings

Settings

This is where a lot of the magic happens. Configure the basics well, and you probably will be OK with anything you do in FRANK CRM.

Be aware that, if you imported data from another source as FRANK CRM, the settings will apply to new records, but not automatically count for imported records. Importing from other data sources is possible in a full version of FRANK CRM.

Getting started

The page on "Getting started" has been highlighted already before. You find this page described in the chapter "Getting started".

Default

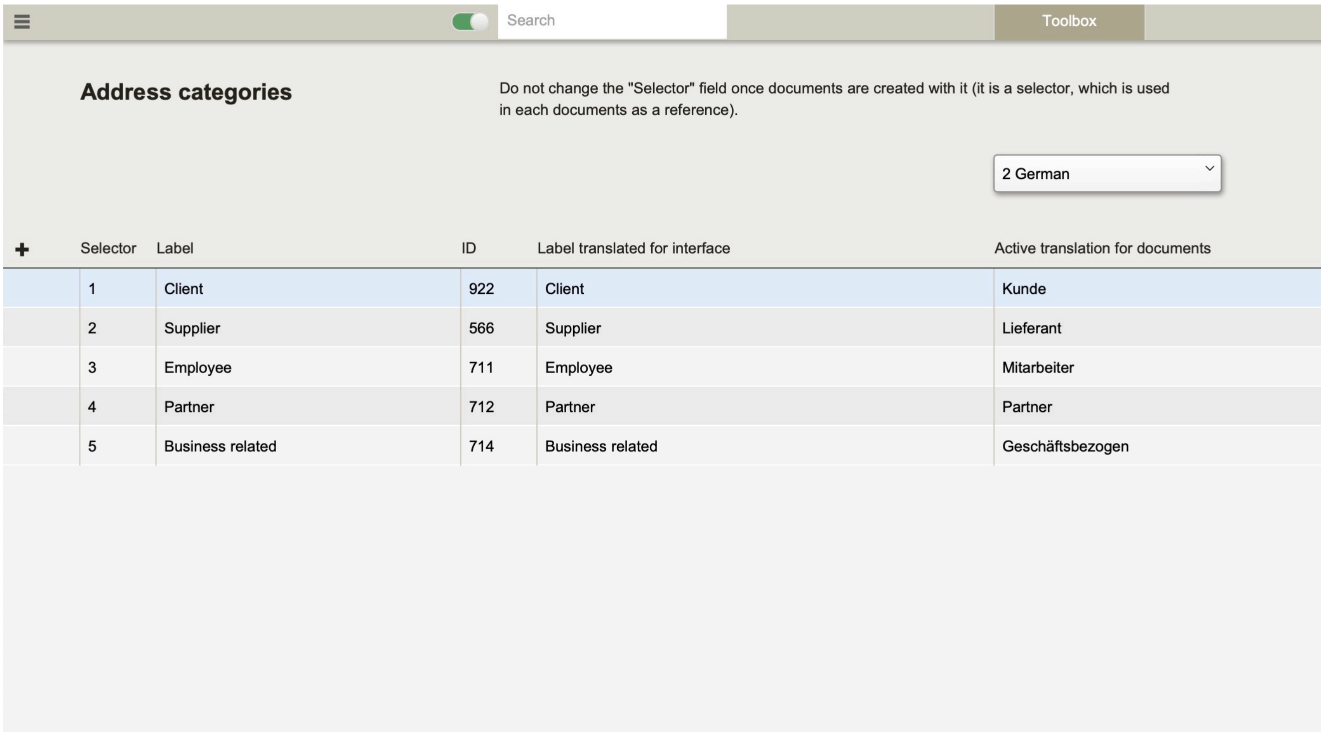
The Default settings are basic settings to get you started in your specific situation.

- The **Default Address Type** should be the most used address type you might encounter. It is used as a preset for any new address and can be changed within the address.
- **Default Country** should be the country from which you send invoices. This setting excludes the country name from the address block used on sales documents, but leaves the country name for all other countries.
- **Default Language** defines your preferred interface language for the entire application. It is the first language loaded when starting the application. As soon as a user logs in, the user-specific language is loaded, depending on the settings in his or her user profile. Regardless of these settings, you can switch interface languages in about every layout.
- **Select your company:** You must enter your company address first, before you can choose it here. Your company address is the Sender address for sales documents. Check the address layout for all settings that might apply.
- **Short company name:** Write a short reference to your company, as can be used in communication with your clients (I for example, use "Kursiv" instead of the more formal "Kursiv GmbH").
- The **Standard document path** refers to the path where documents are saved.

Address categories

Structuring your addresses

Address categories are a simple list of typical category clients or contacts you might have. Create the categories you might want to use to differentiate between multiple addresses, like "client", "patient", "supplier", etc.



Selector

The first column has a simple number. This is the "Selector". When you select a category, you select this number, regardless of the text label. As all texts are made multilingual here, it is never the text which can be reliably referred to, but only the number. Be careful to edit, remove or change any labels, as this will immediately affect all records with any of these selectors attached.

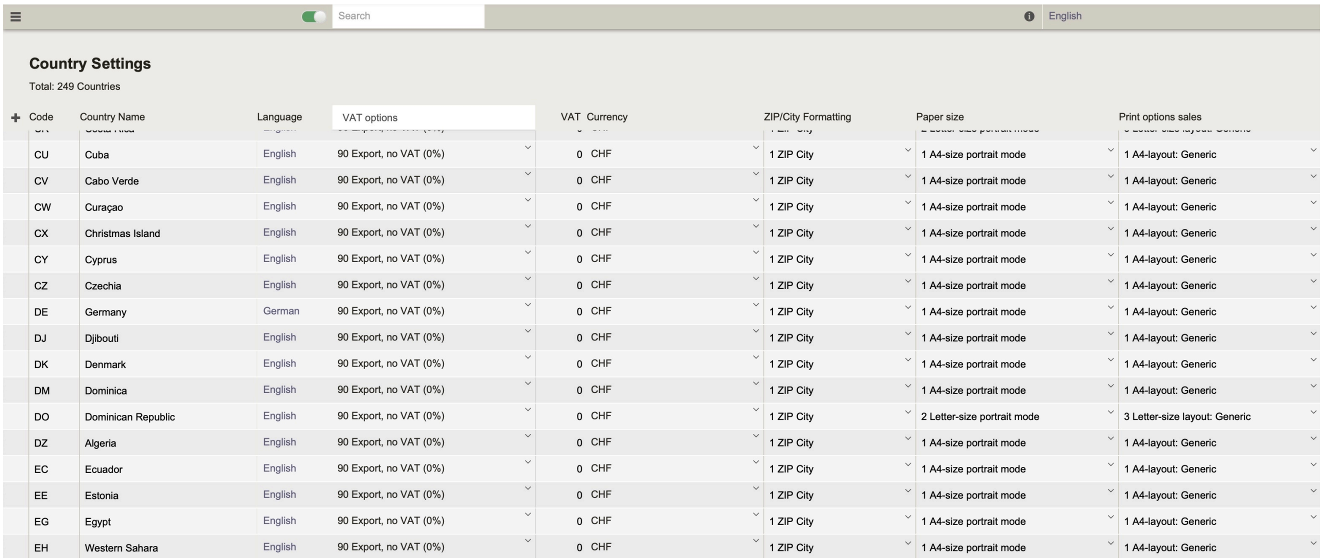
Tip

Over time, it is easier to work with fewer options. Don't overly differentiate, unless you have certain workflows in view.

Country settings

Probably the most important settings page

The Country Settings are a list of all countries and basic settings for each country. Settings for any new addresses can be updated from this table, once a country is assigned. This is already automated.



Search English

Country Settings

Total: 249 Countries

Code	Country Name	Language	VAT options	VAT	Currency	ZIP/City Formatting	Paper size	Print options sales
CU	Cuba	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CV	Cabo Verde	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CW	Curaçao	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CX	Christmas Island	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CY	Cyprus	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
CZ	Czechia	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
DE	Germany	German	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
DJ	Djibouti	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
DK	Denmark	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
DM	Dominica	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
DO	Dominican Republic	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	2 Letter-size portrait mode	3 Letter-size layout: Generic
DZ	Algeria	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
EC	Ecuador	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
EE	Estonia	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
EG	Egypt	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic
EH	Western Sahara	English	90 Export, no VAT (0%)	0	CHF	1 ZIP City	1 A4-size portrait mode	1 A4-layout: Generic

Among the settings are

- Country code
- Country name
- Language (or: main language)
- VAT options (from the value list "VAT handling")
- VAT percentage
- Currency
- ZIP/City formatting (as used for formatting the address block)
- Paper size
- Basic sales document layout (or: any specific version per country)

From this table, values are copied to new addresses and documents

All these settings are just copied from this table to any address. They can be adjusted within the address record and are copied from there to any sales document. Again, the settings can be adjusted in the sales document. The advantage of the country settings table is that most settings are automatically and correctly applied, while you keep maximum flexibility.

This is how information is copied:
Country Settings > Addresses > Sales documents

At each stage, you can change the settings, which will affect all new documents or workflows coming from that position. For example, the main language in Switzerland is German. This is the language most spoken. However, there are 4 official languages. When creating an address for a customer of the French-speaking area in Switzerland, the new address will have "German" from the country settings table. I now have to adjust the language for that address to "French", which will be used for any new sales document.

See how things link together

All popup value lists used in this country table originate from other value lists. Some of these are available through the Settings menu in the left navigation. Other value lists are only for developers and available through the Developer Dashboard (as available in a full version of FRANK CRM).

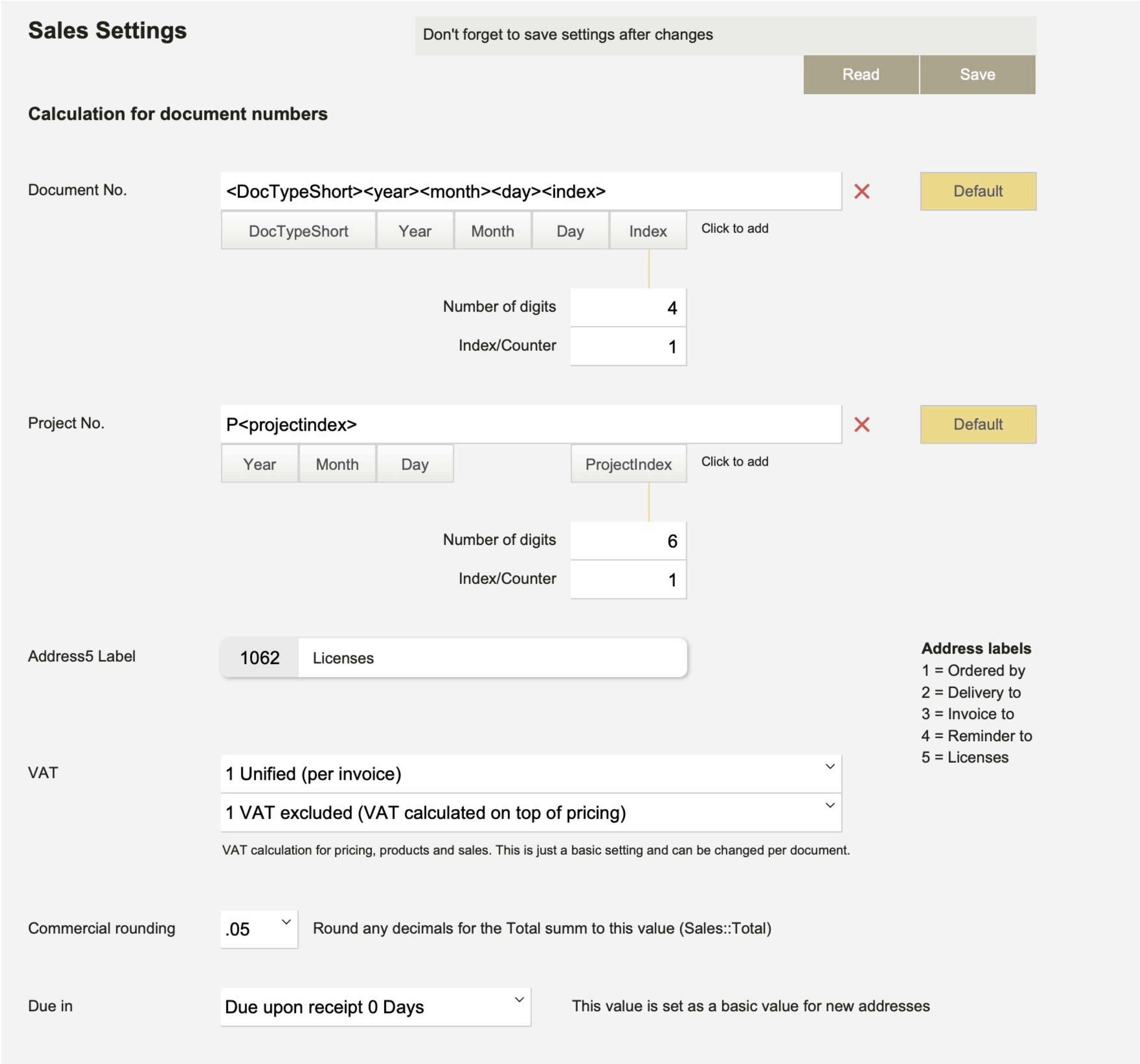
Sales settings

Settings for your sales documents can be adjusted

The settings for sales documents are critical. Again, this is about basic settings, as will be used throughout the application and which will be copied to new sales documents.

The settings include

- Formatting of document numbers
- Formatting of project numbers
- Label for address 5 in sales documents
- Basic VAT handling
- Basic VAT option
- Commercial rounding settings
- Basic number of days till the due date



Print settings for sales documents

- Which information to print on sales documents? (per document type)
- Which addresses to print on sales documents? (per document type)

Show this information on sales documents:

Fields — Document Type

Print this information ↓	1 Offer	2 Confirmation	3 Delivery note	4 Invoice	5 Credit note
Order date	✓	✓	✓	✓	✓
Order number	✓	✓	✓	✓	✓
Order reference	✓	✓	✓	✓	✓
Ordered per	✓	✓	✓	✓	
Document No.	✓	✓	✓	✓	✓
Document date	✓	✓	✓	✓	✓
Document Type					
Due	✓	✓		✓	
Total	✓	✓	✓	✓	✓
Project number Internal		✓	✓	✓	
Online order date		✓	✓	✓	
URL Webshop			✓	✓	
Online order number		✓	✓	✓	
VAT number sender				✓	✓
VAT number receiver	✓	✓	✓	✓	✓
Shipping option	✓	✓	✓	✓	
Delivery date	✓	✓	✓	✓	✓
Delivery method	✓	✓		✓	
Tracking number					
Our contact	✓	✓	✓	✓	✓
Your contact	✓	✓	✓	✓	✓

Show these addresses on sales documents

Print these addresses → / Onto these documents ↓	1 Ordered by	2 Delivery to	3 Invoice to	4 Reminder to	5 Licenses
Offer 1	✓	✓	✓		✓
Confirmation 2	✓	✓	✓		✓
Delivery note 3	✓	✓	✓		
Invoice 4	✓	✓	✓		✓
Credit note 5	✓	✓	✓		✓

Each document type can have up to 5 addresses displayed. The document types are: Offer, Confirmation, Delivery note, Invoice and an optional free label (See above. Standard: license address).

This presetting is copied to new documents, where it can be edited for that specific document.

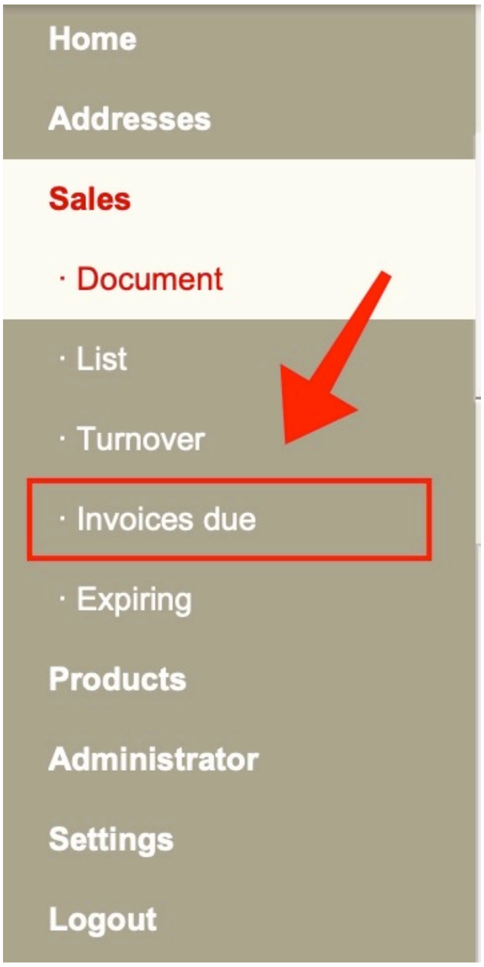
Read | Save

These settings can be adjusted from within any document. It is much easier, though, to use a standard setting which fits most requirements for the documents in view.

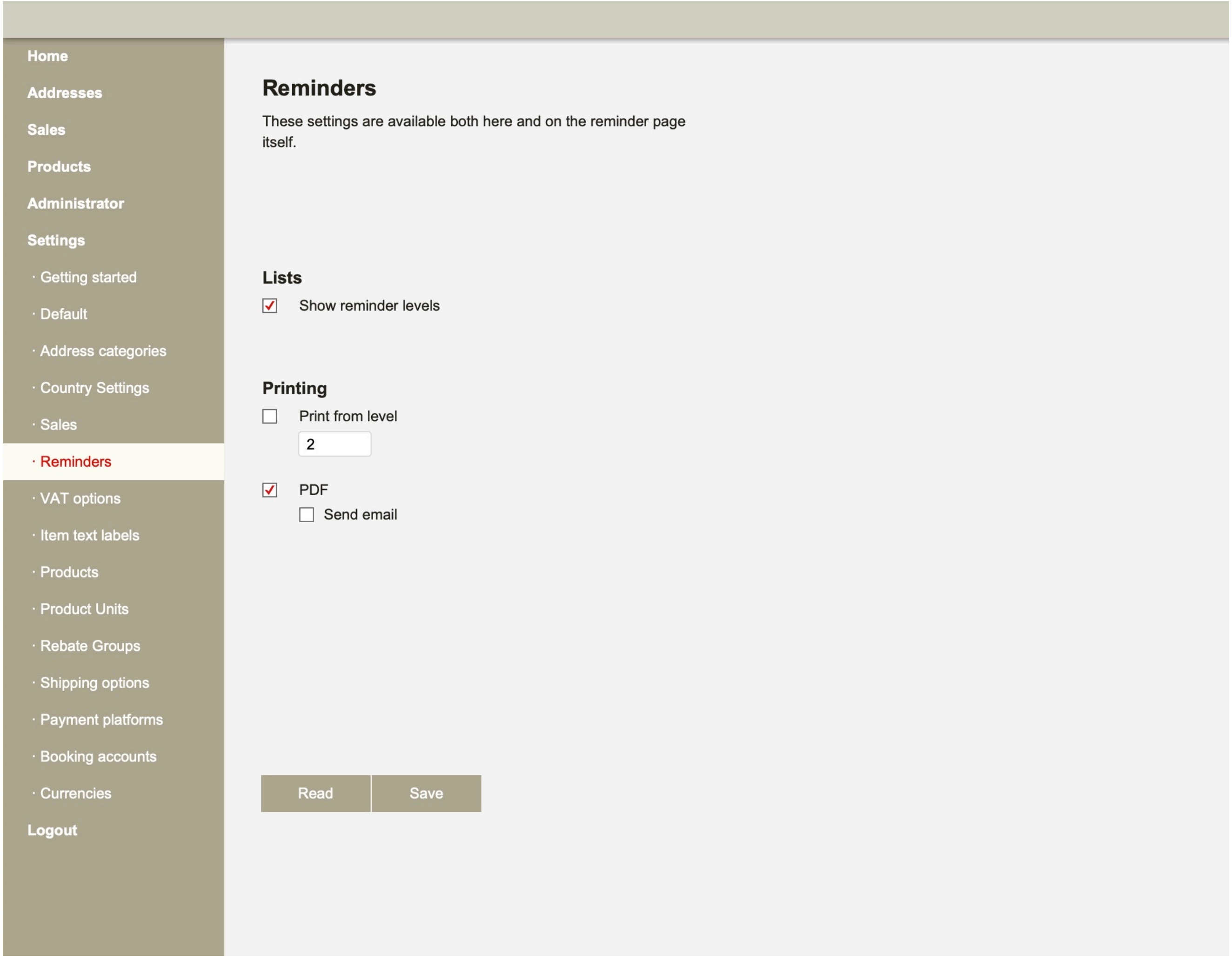
Reminder settings

Reminders for overdue invoices

Reminders are recognized for invoices, where the due date has passed. If there are any invoices past due, you will find them under Sales > Invoices due.



The basic settings can be corrected both on that page and here under the Reminder settings.



Reminders are shown in a list. By sorting the list, you can display the reminder levels, which is probably the basic requirement.

Sending reminders per e-mail

When creating reminders, you can print to paper or create PDF-documents, or both. When creating PDF documents, you can choose to create an e-mail automatically and attach the reminder PDF to it. It will not actually send the e-mail, but create a new email for you and allow you to edit the text. The email will be addressed to the person you choose in the invoice, and use the email-address you listed for that person or department. You can change or enhance that information in the e-mail itself.

VAT handling

Value added tax

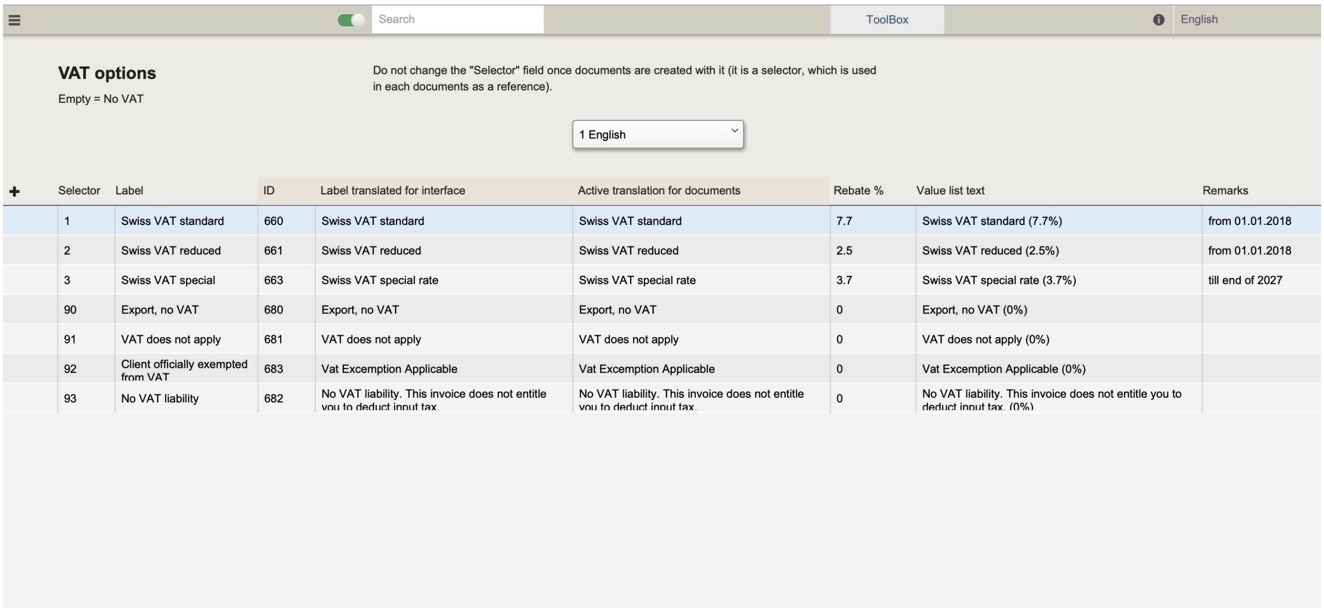
Most countries have some sort of value added tax, frequently with different percentages, depending on the type of product or service.

FRANK CRM uses a value list to define all the percentages you might need. Here you create all the variants you need. From this value list, you can pick a standard for each country, and each address can have its specific VAT handling attached. The value list is created in a simple table. These are the "VAT options".

VAT Options

First, take a look at the table with different VAT options. You find this list under Settings > VAT options.

Note that there are country specific options, but also values for export or zero VAT. The values are not just about the **percentages,** but also about the **text labels** attached to it. These are used on sales documents and are also **printed.** Make the texts meaningful and explanatory. To each line, extra notes can be added, like hints on when these regulations came into effect or until when they are valid.



Selector	Label	ID	Label translated for interface	Active translation for documents	Rebate %	Value list text	Remarks
1	Swiss VAT standard	660	Swiss VAT standard	Swiss VAT standard	7.7	Swiss VAT standard (7.7%)	from 01.01.2018
2	Swiss VAT reduced	661	Swiss VAT reduced	Swiss VAT reduced	2.5	Swiss VAT reduced (2.5%)	from 01.01.2018
3	Swiss VAT special	663	Swiss VAT special rate	Swiss VAT special rate	3.7	Swiss VAT special rate (3.7%)	till end of 2027
90	Export, no VAT	680	Export, no VAT	Export, no VAT	0	Export, no VAT (0%)	
91	VAT does not apply	681	VAT does not apply	VAT does not apply	0	VAT does not apply (0%)	
92	Client officially exempted from VAT	683	Vat Excemption Applicable	Vat Excemption Applicable	0	Vat Excemption Applicable (0%)	
93	No VAT liability	682	No VAT liability. This invoice does not entitle you to deduct input tax.	No VAT liability. This invoice does not entitle you to deduct input tax.	0	No VAT liability. This invoice does not entitle you to deduct input tax. (0%)	

Warning

Be careful not to delete any options, once you have created documents. Specifically, do not alter the field Selector, which has a number in it. This is the value copied to addresses and sales documents. Based on this value, the text label and percentage are copied to the sales document, from where they are printed or used in PDF documents.

Where to use VAT options?

Country Settings

As a next step, head over to the Settings > Country Settings. Here, you can set a basic option for VAT handling per country. This value will be copied to new addresses upon creation. It is a basic setting.

Address Settings

When creating a new address, the VAT option for that address will be set from the Country Settings, as soon as you add the country name. If needed, you can then change the applicable VAT option for that address. Edit this value under: Address > Settings.

Sales Settings

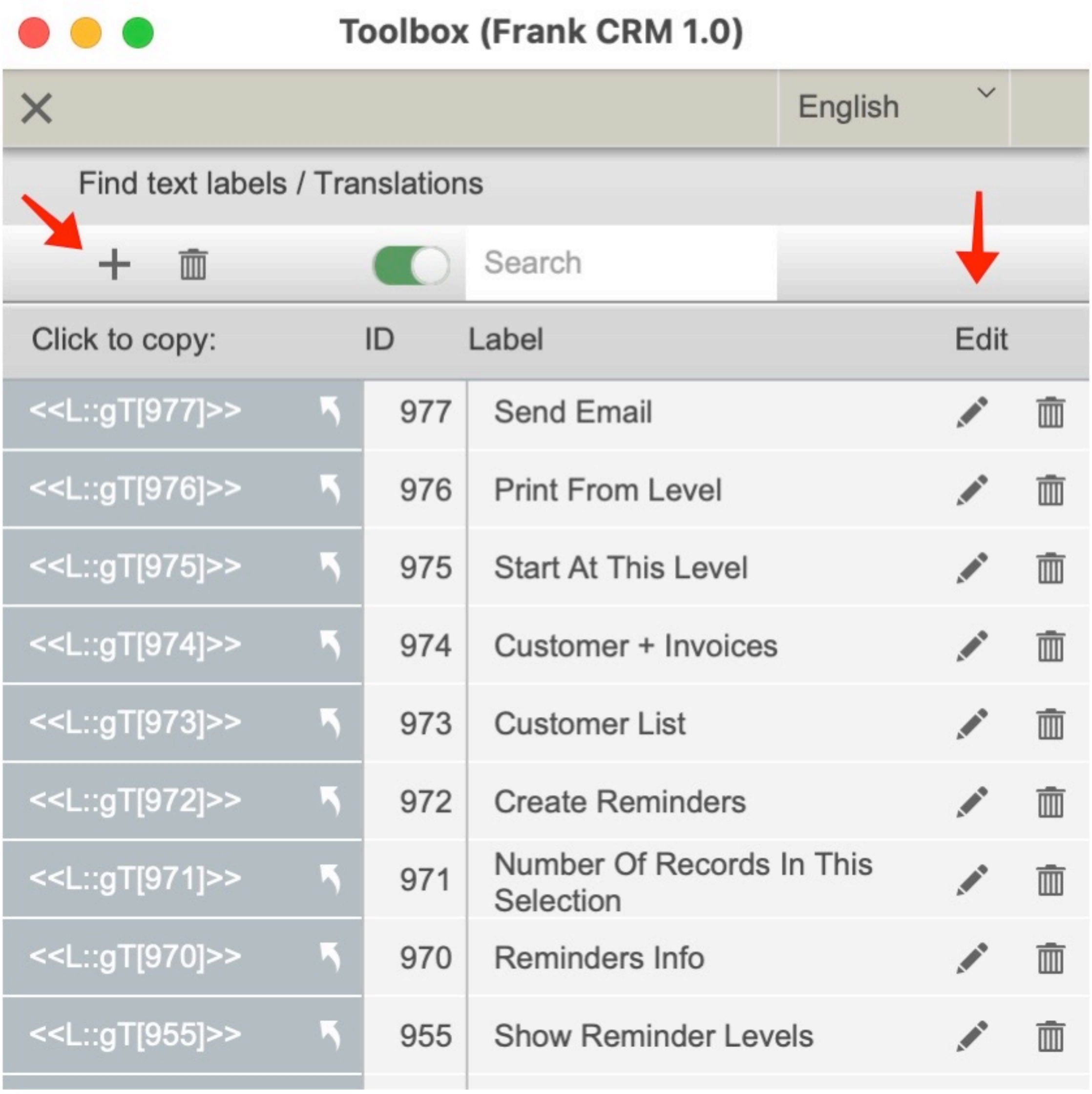
When creating a new sales document from any address, the VAT option for the document is taken from that address. You can change the option per sales document. Edit this value under: Sales > Settings.

Creating new values

When creating new values, you enter a new internal label and then add an ID for a translation. If your desired text is available, you can select it. If it is not available, you must create it as a translation in the Toolbox.

How to add translations (labels)

Click on "Toolbox" in the top bar to open the Toolbox window.



You can search for texts in the search field. Click on "+" to add a new entry and on Edit (icon: pencil) to edit the translations. Edit the first field in English, then click the translate button, which will use DeepL to automatically translate all languages for you.

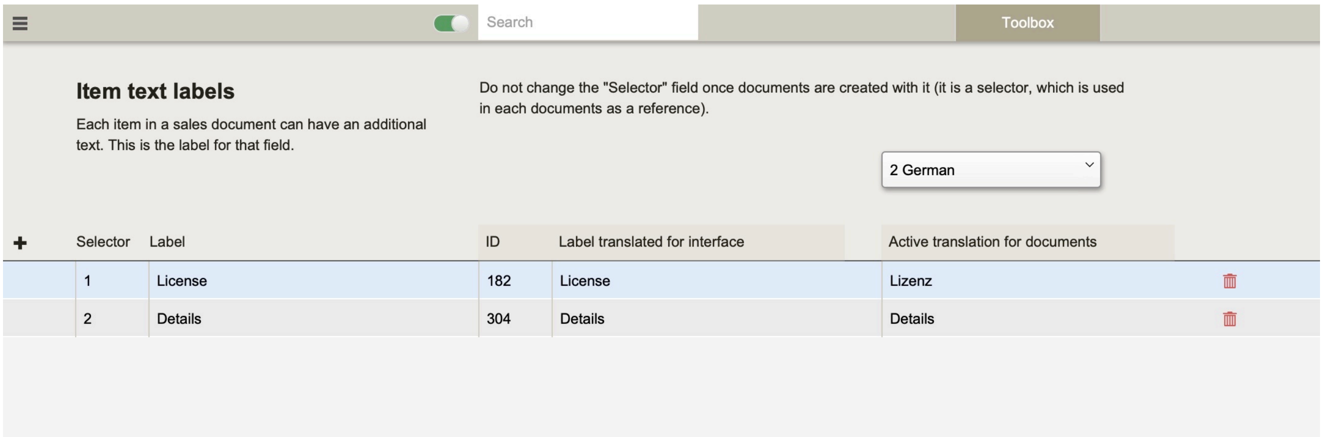
How to make new translations visible

Once you added a new translation, switch to the list of VAT options and **refresh your language selection.** This will load the newly added translation. Then click in the field for the translation ID, search (start typing) for your newly added translation, select the entry and the new translated label will appear.

Item text labels

Item text labels

This is about additional information to any item listed in a sales document. The "Item Text Labels" are used to label a piece of information about a certain item in a sales document. Your list looks like this:



Every record in this list is a possible "Label" for specific information of a sales item. As the content might change, you can define multiple labels, which also will be correctly translated according to the setting for the document.

There is a label and a text field. The label can have the text "License" and the text has the license code, description, etc. Or the label can be "Details" and you list whatever information is needed for that specific sales item, be it a location, a certain variation, a limitation or whatever is needed additional to the basic product description.

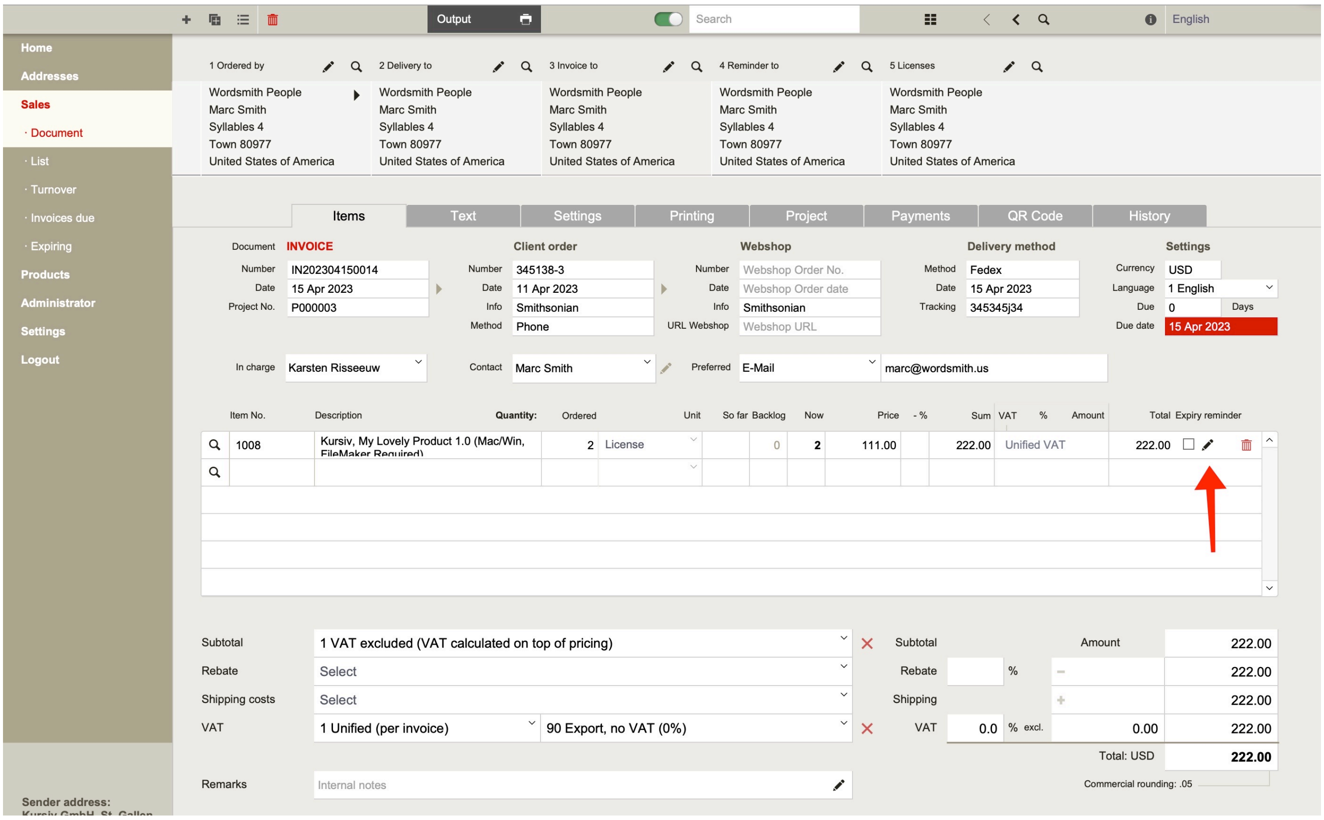
First, let's see **where** a user accesses this information, then let's see **how** these text labels are used.

Where is this used?

Each sales document will have one or more items listed. Each item has multiple basic information fields, like item number, item description, the price, any rebate and more. At the end of each item line, you can edit the details. A card window pops up with more options.

Where to find the item details window

How to access the detail window of any sales item:

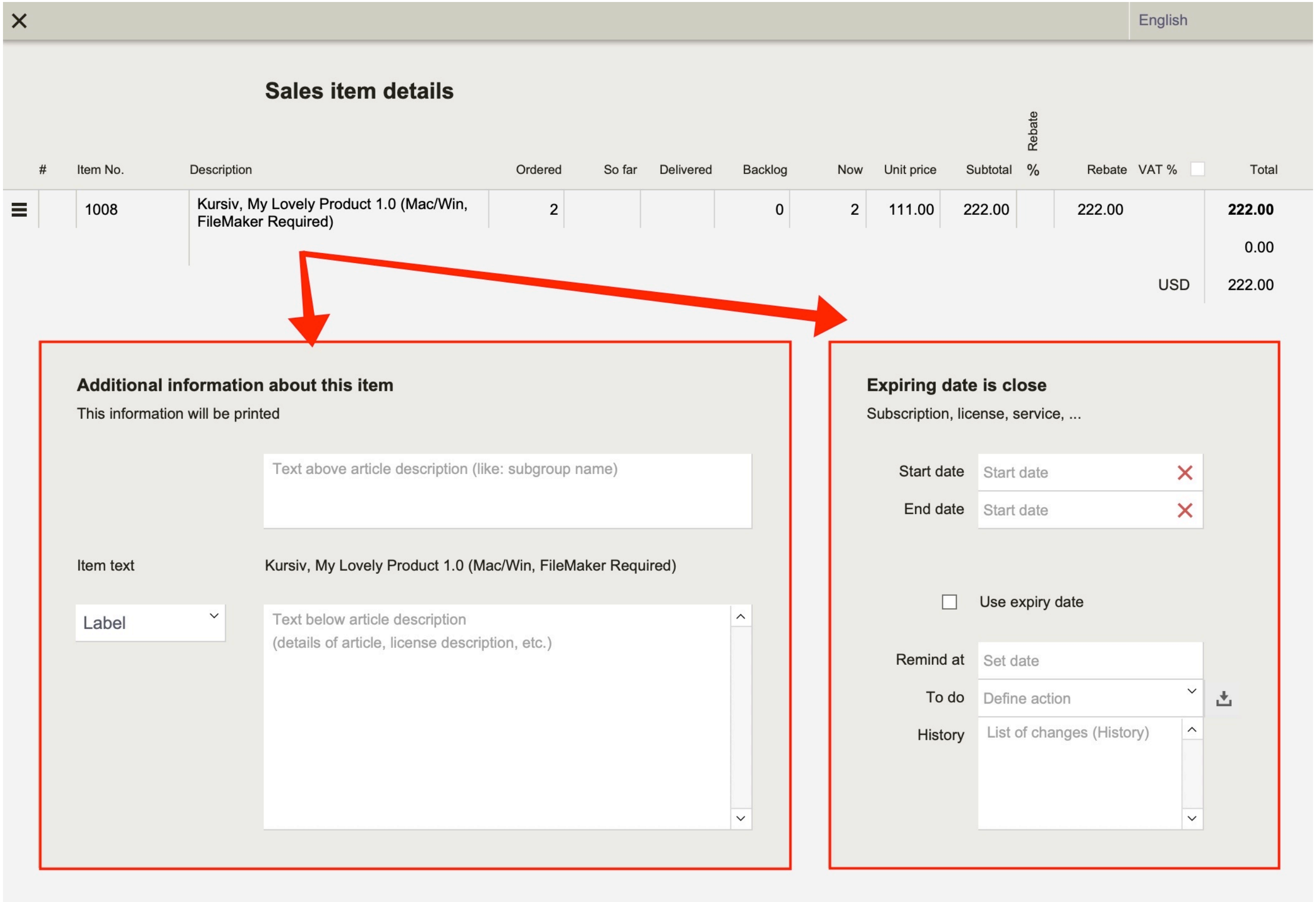


Click on the pencil to open the details window.

Item details window

When you open the details' card window, you will see this screen. The top line has the regular information about a sales item. Below are two areas to add further information:

- Enhance written information about any item (left)
- Add an expiry date to the item (right)



Item text labels

On the left side you see a label popup and right next to it a text field. This is the popup menu, resulting from the item text labels in Settings > Item Text Labels. It should describe the content of the text written next to it.

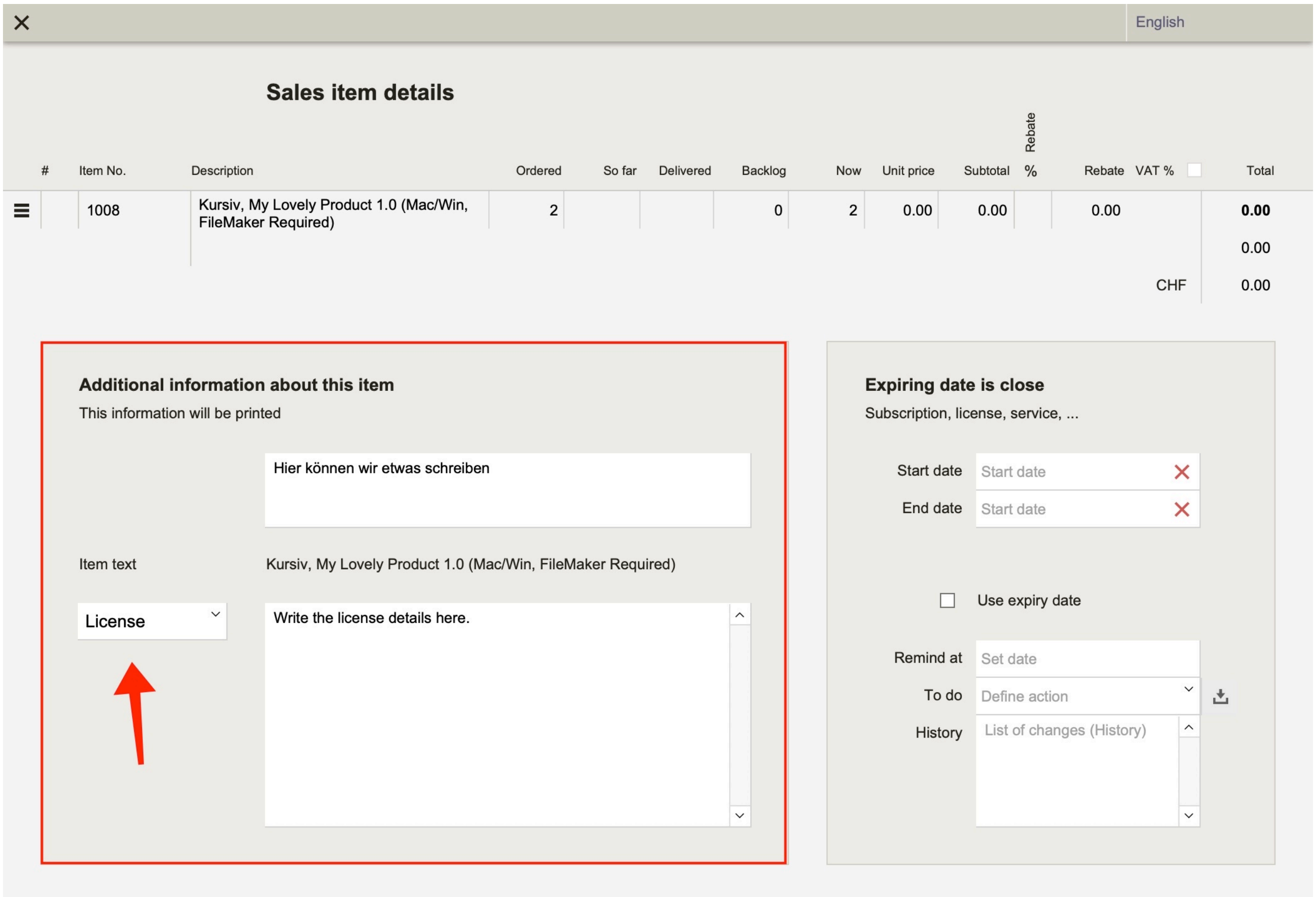
As in almost any other value list, you create a new link (set a unique selector number) and text. You can translate the text by using the Toolbox in the top bar. After adding a text, **refresh your interface language** (simply choose from any popup menu to switch languages) and the new text will become available to be chosen in your label lists' new entry.

How is this used?

Label for the additional information

The information added to a single item can have a text label. This value list gives you the choices for that item text label.

In the item details' card window, you can select this option:



As with most value lists in FRANK CRM, these labels are multilingual and thus will fit perfectly in your document, no matter the language you choose.

Product settings

Simplifying the creation of invoices

Any products or services you have can be kept in the product database. Using article numbers to refer to a product helps you to quickly create invoices. Once an article number is added as a sales item, the description, price and unit are copied from the product table to your sales item.

Product settings streamline your product information

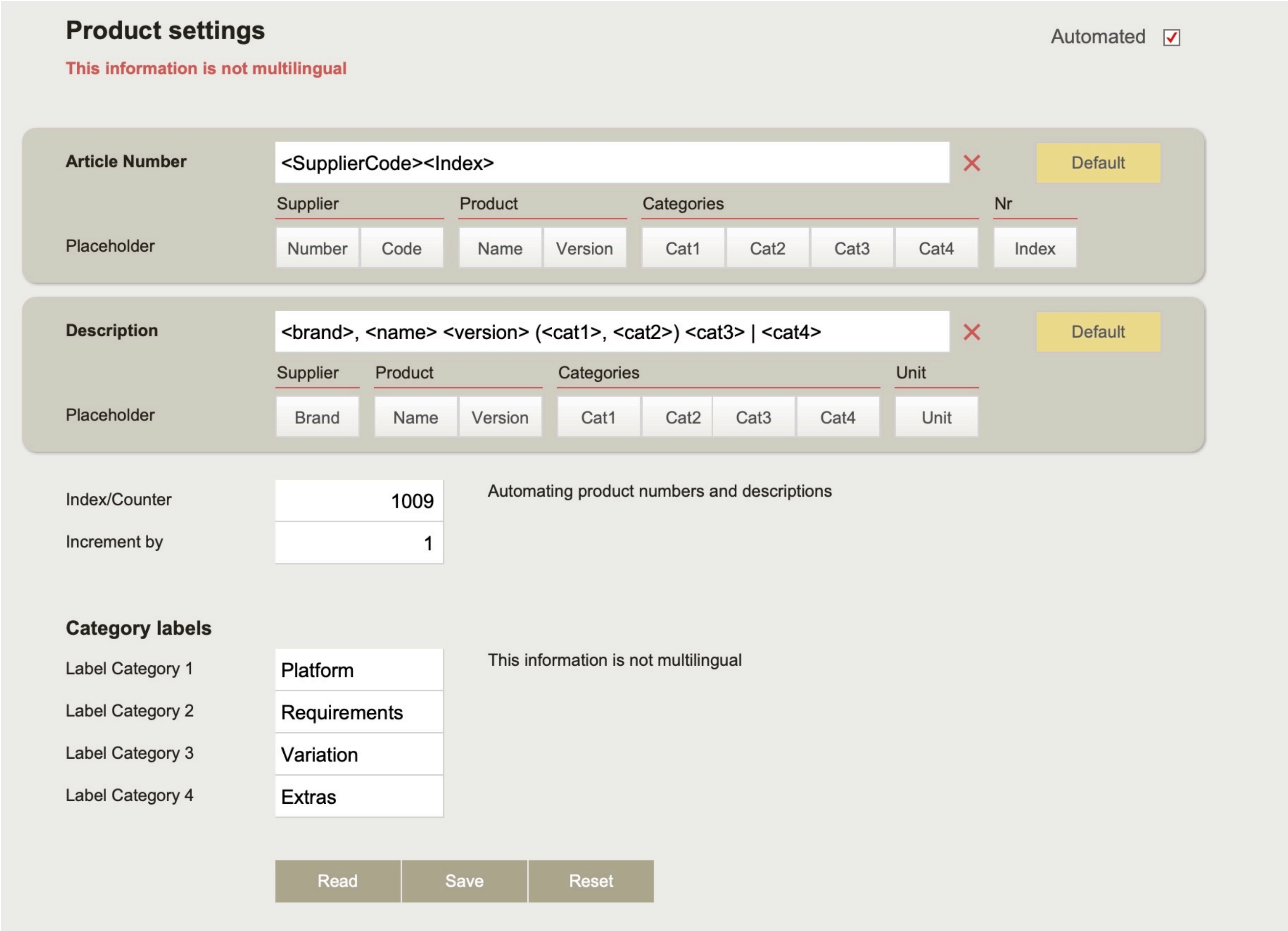
It can be tedious toil to maintain a larger product database. You want to automate as much as possible. For example, the creation of item numbers and item descriptions. Here, in the Product Settings, you can define the structure and basics for that information.

Generic approach by using placeholders

Define how article numbers (item numbers) and a product description should look like. This is a generic approach. It does not define the details of any product, but only defines which parts of information are used to create a description or item number.

The way it works is simple: There is a field for the article number and description, which calculates a proper item number of product description, indicated by placeholders and regular text.

Check the example below:

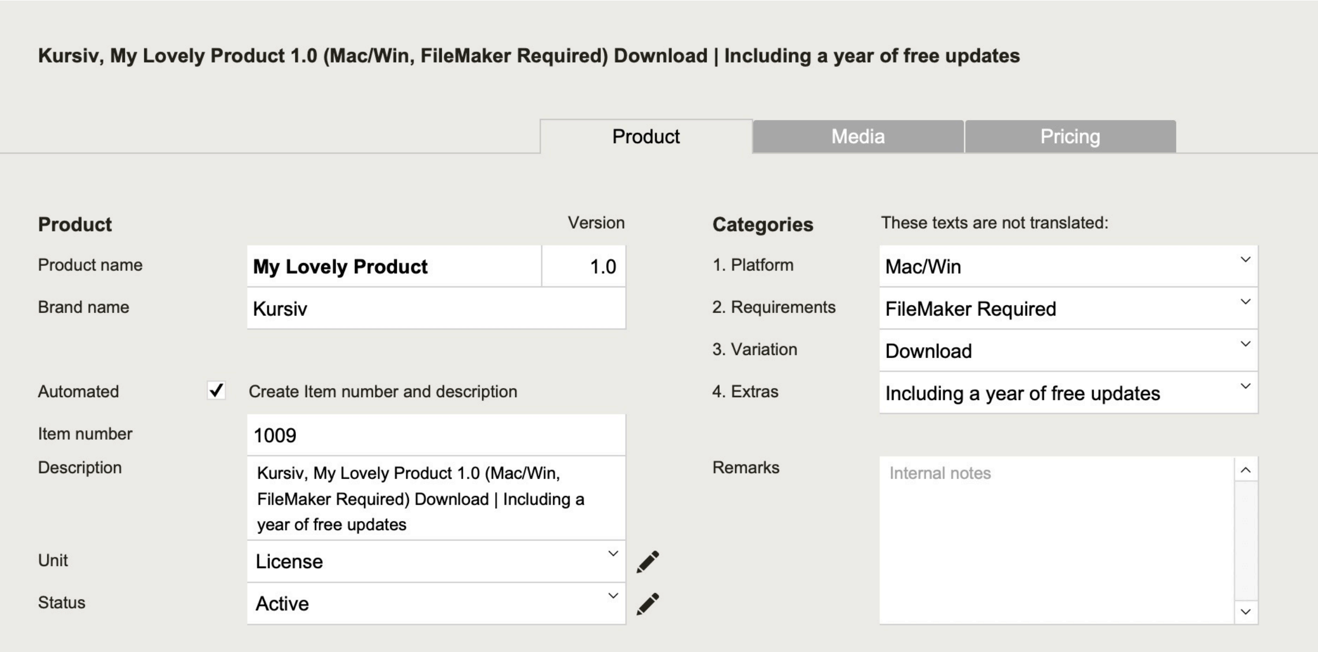


The placeholders are put in order here. Use regular text and punctuation to enhance the information. The real information of any product is put together in the product record of the product database. See under Products. The placeholders are then replaced with that information, to create a unique article number and description.

Labels for product categories

In the lower part, the category labels for 4 categories can be defined. These category labels are not multilingual and are only relevant for users of the software. The content for each category can be created on the fly for each product, thus can be in any language. All this information will not be translated.

On a product page, it looks like this:

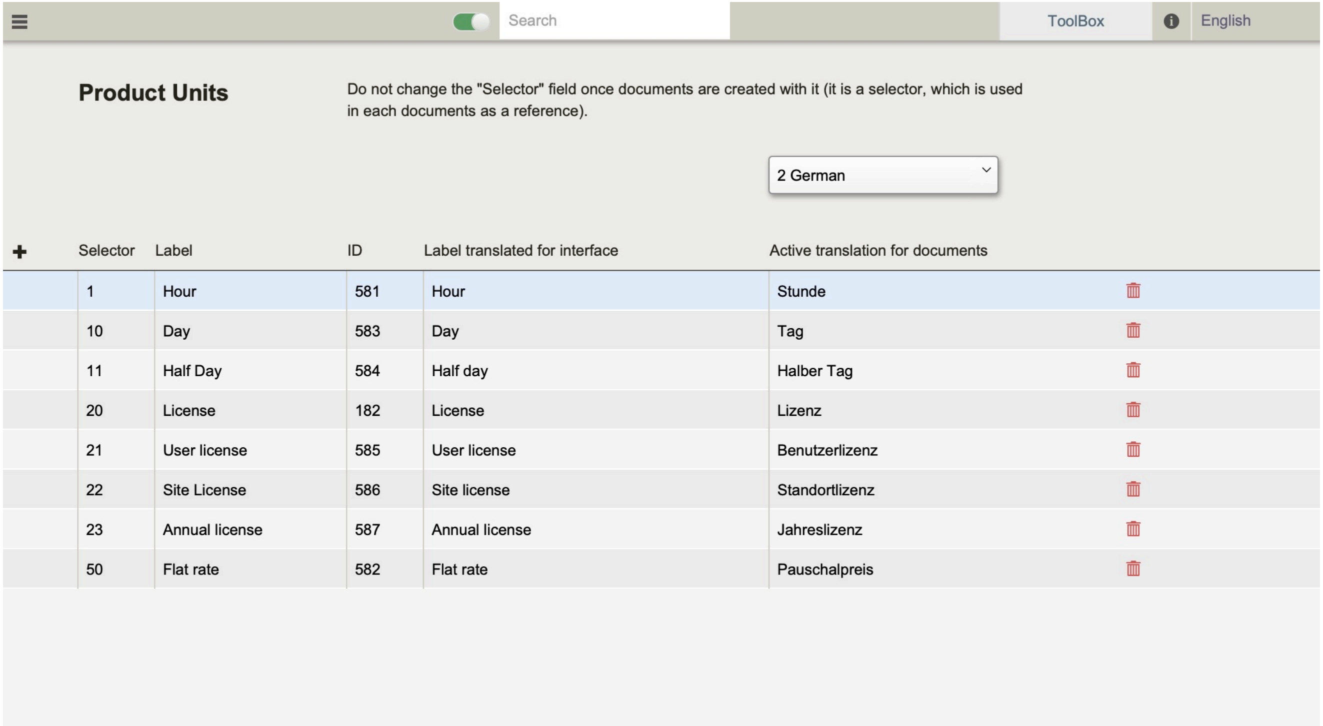


Item number and description are then used for sales documents (where they can be overwritten, enhanced, etc.).

Note: The item number had a supplier code in the definition. In this case, the supplier did not get a supplier code, and it is left out for the product. All works well. When adding a supplier code for the listed supplier, this information might be updated.

Product units

Product units are sales units. It might be an hour of your time, a single pencil or a box of pencils. As product units provide essential information about what has been ordered and delivered, it is helpful to have it managed in a list with added translations.

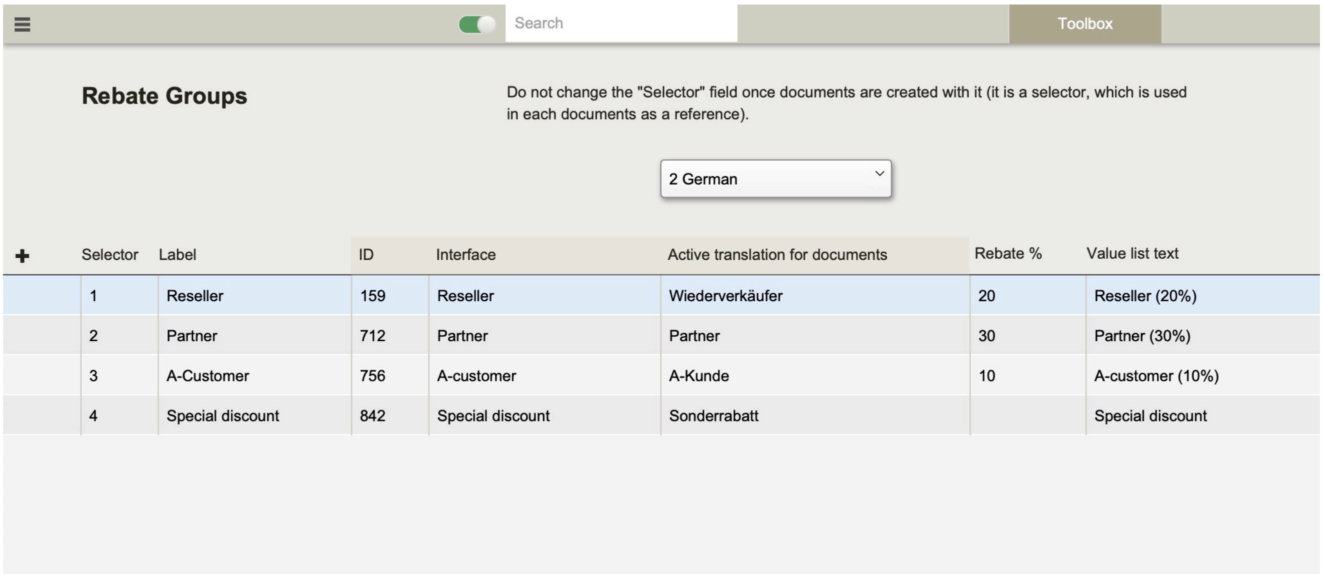


Selector	Label	ID	Label translated for interface	Active translation for documents
1	Hour	581	Hour	Stunde
10	Day	583	Day	Tag
11	Half Day	584	Half day	Halber Tag
20	License	182	License	Lizenz
21	User license	585	User license	Benutzerlizenz
22	Site License	586	Site license	Standortlizenz
23	Annual license	587	Annual license	Jahreslizenz
50	Flat rate	582	Flat rate	Pauschalpreis

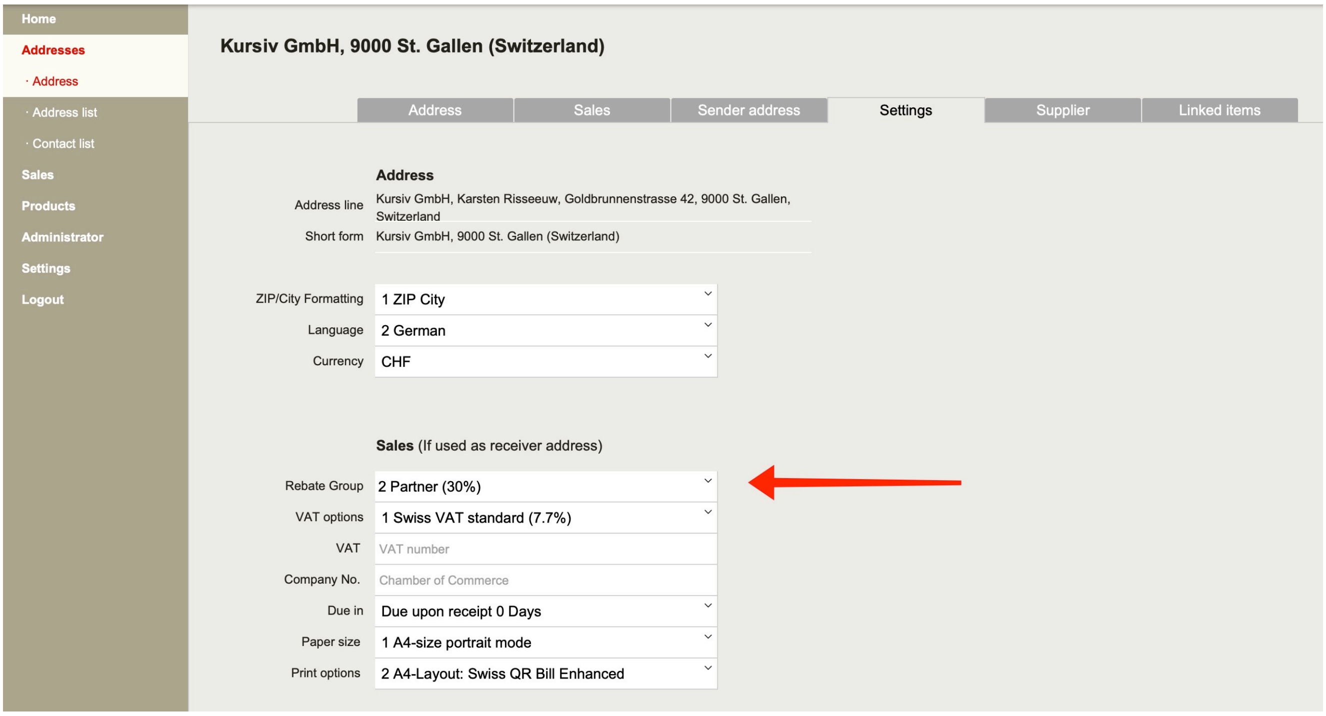
Click in the field "ID" and a list of available phrases will pop up (in English). Choose any of these labels and the translation ID will be filled in. If you need to add another phrase, not yet available, click on the Toolbox in the top bar. The Toolbox has all text labels in all languages. Once added, refresh the language selection to load the new label. It can then be selected as shown above.

Rebate groups

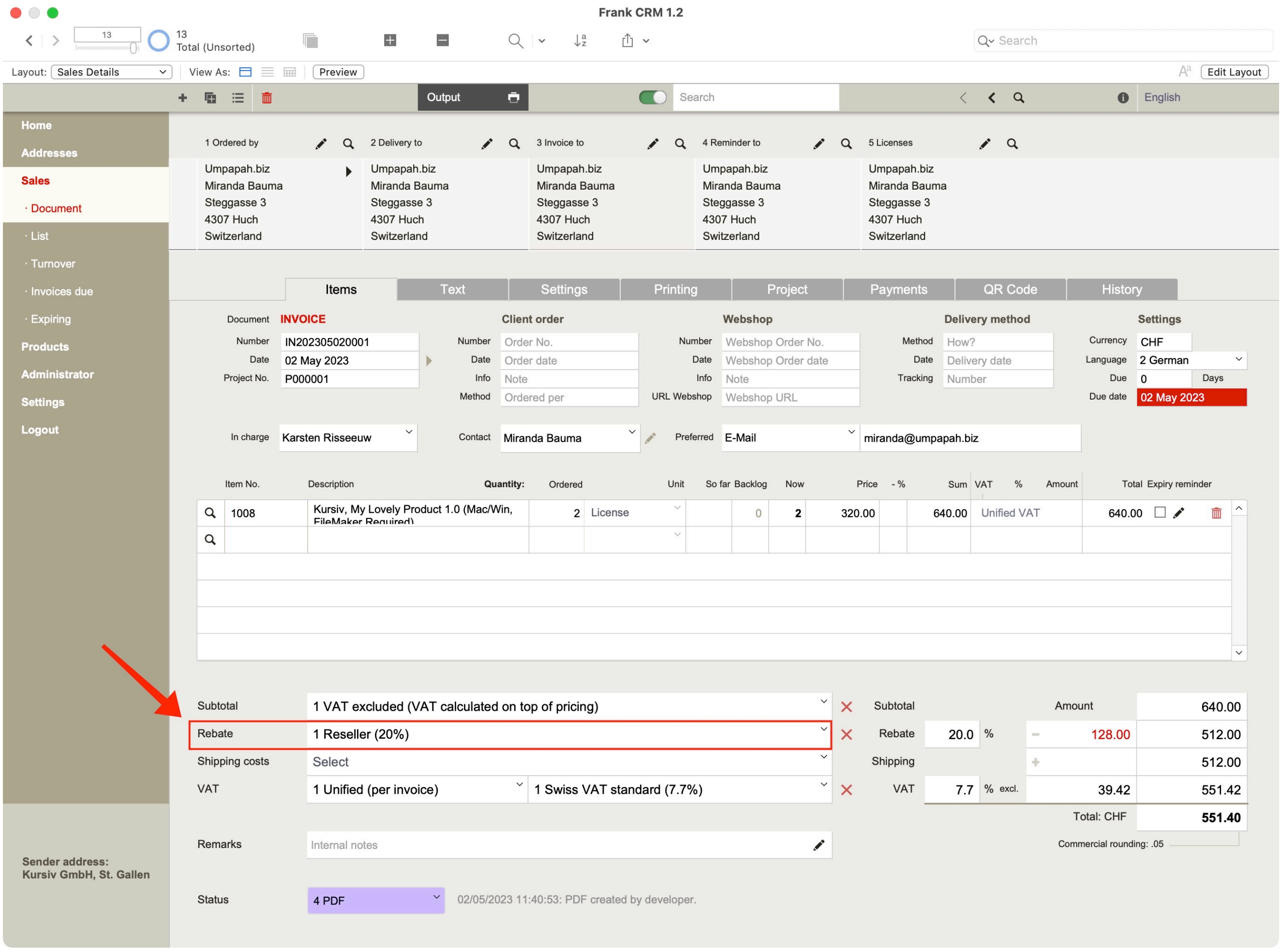
Customers can be assigned to rebate groups. These might be Resellers, VIP customers, partners - you name it.



Rebate groups are assigned to a customer and can be set here:



This information is copied to any sales document, where - again - it can be changed as you like:

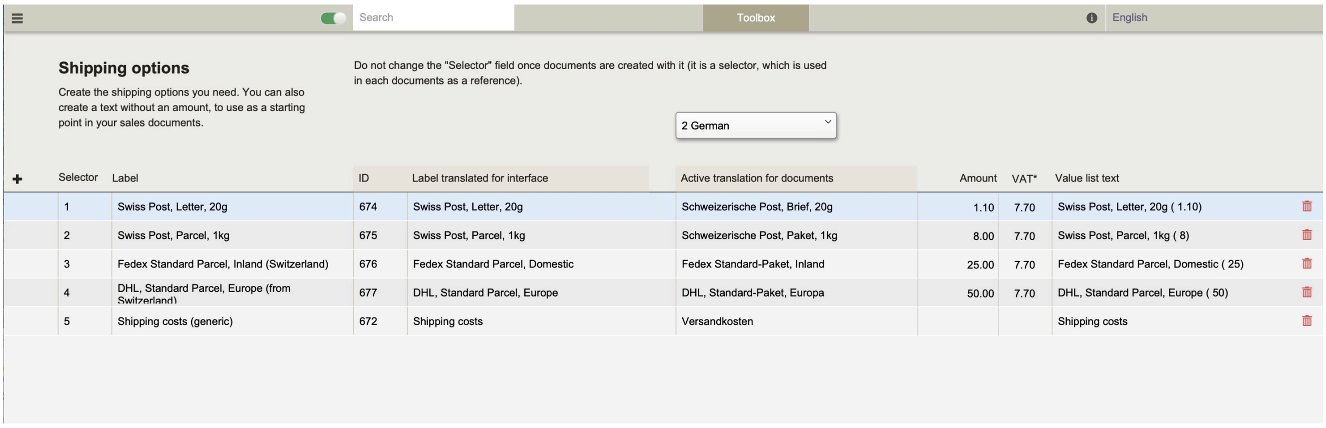


Rebate groups are simple to create and to assign.

Shipping options

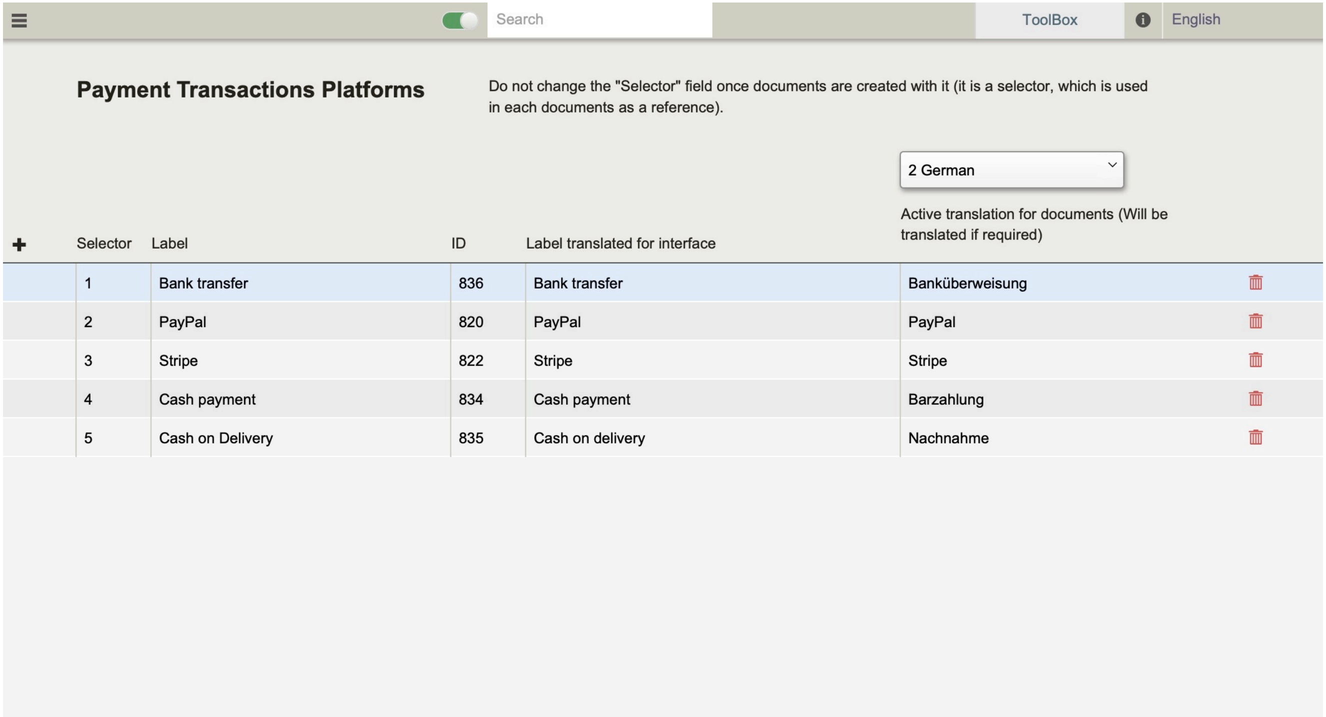
Shipping options reflect your costs for shipping and handling. Options prepared this way can easily be applied to any sales document, by choosing it from a dropdown menu.

Create all the options you need, reflecting the way you ship something. If you only want a generic option and add the price later, you can do so.



Payment platforms

Payment platforms reflect the options for payment. In earlier days, one would call this "bank accounts". Today, however, there are so many options for payments, that you can create your own variations here.

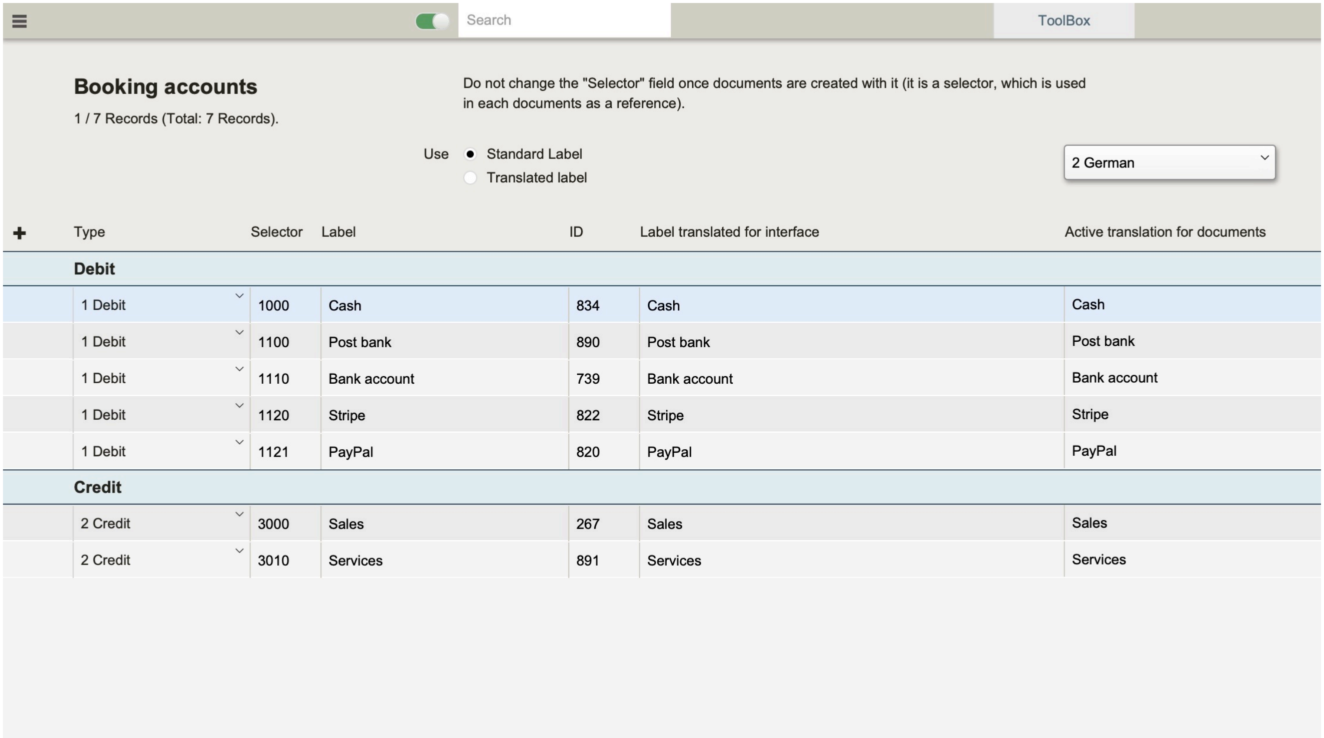


As in all layouts: Click on the field below "ID" to search for a label. If the label does not exist, create a new label by clicking on the Toolbox option in the top navigation bar. Add a new phrase with its translation, then refresh the language to make the new label available.

Booking accounts

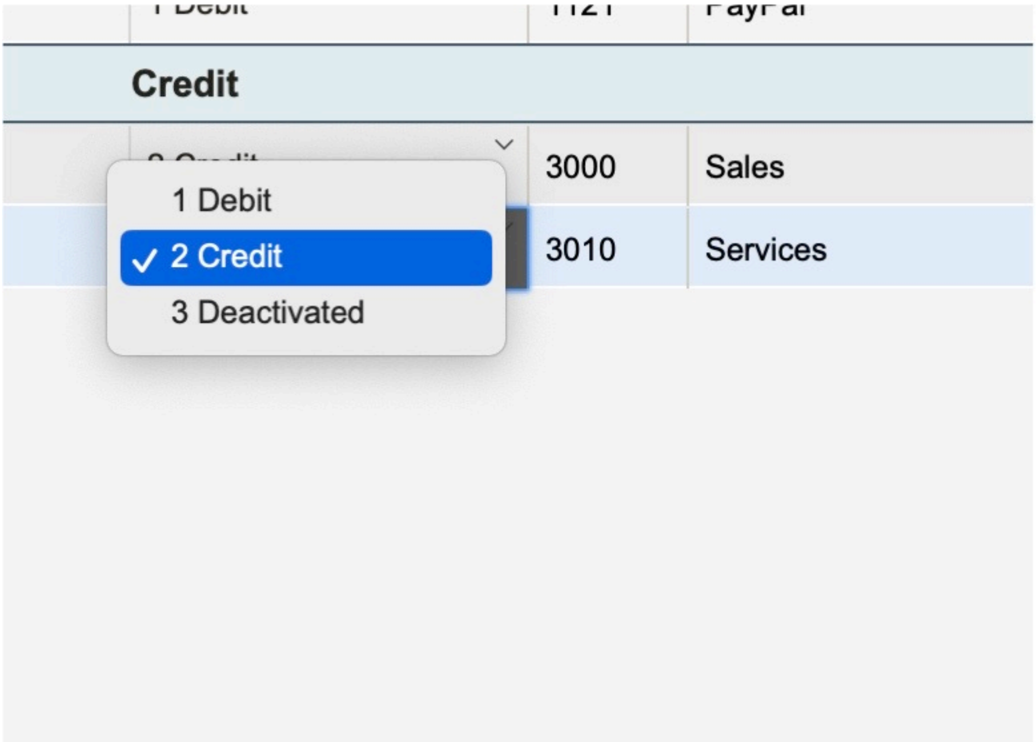
Keep track of payments or prepare for your financial software

FRANK CRM is not a full-fledged financial software. You can, however, add payments for invoices, and assign these payments to booking accounts. Ask your accountant for the booking accounts he uses for your company, and add these accounts to either debit or credit categories.



This is very basic. It might help your bookkeeping, though. If you purchased a full version, you can create and print lists, or make any other links to solutions and overviews you need.

Older accounts might need to be deactivated. Simply switch the type from Debit or Credit to "Deactivated".


Credit
3000
Sales
1 Debit
2 Credit
3 Deactivated
3010
Services

Currencies

Working with currencies

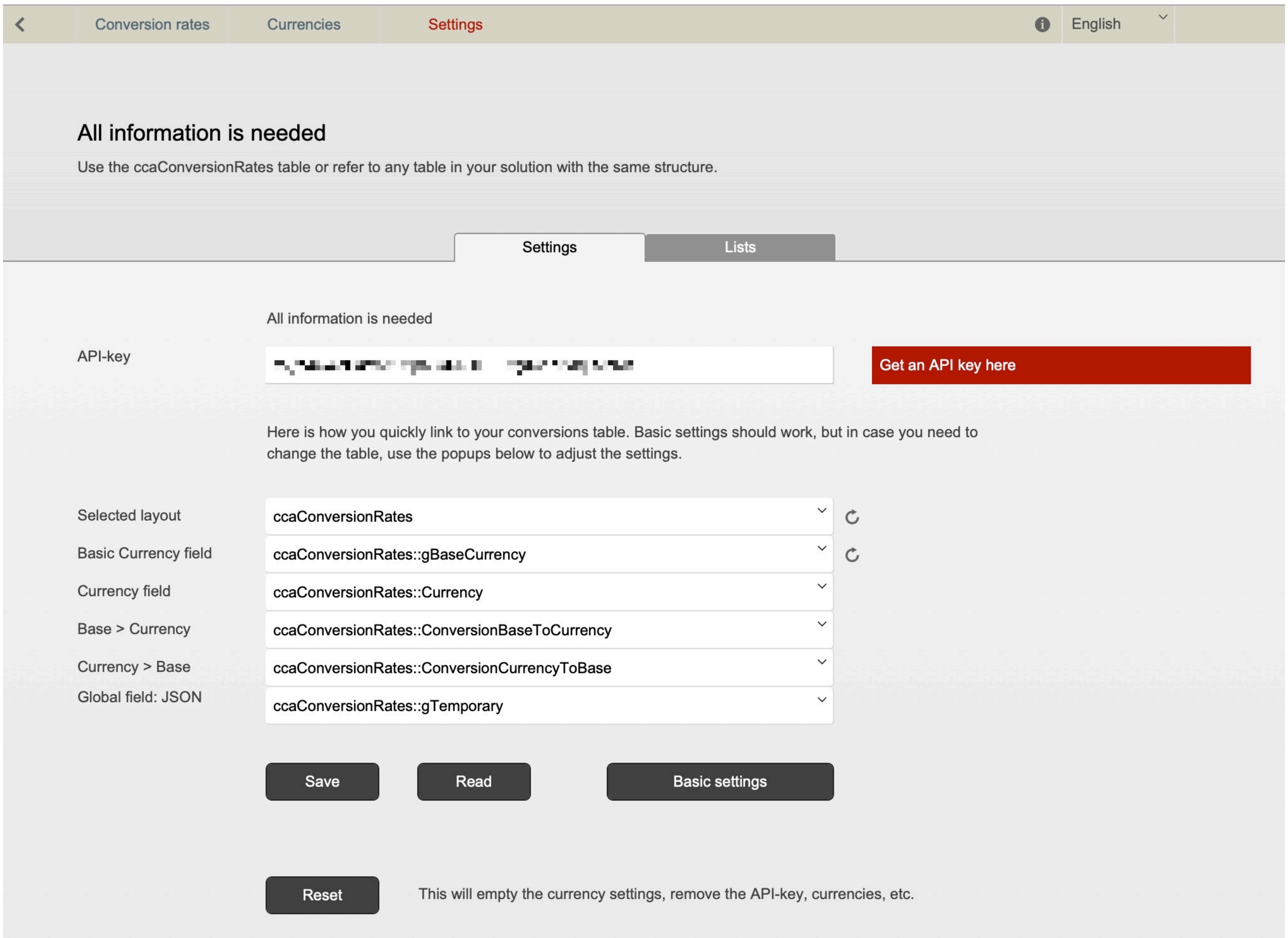
Currencies are essential to invoices. You might be working with a single currency, but FRANK CRM allows for multiple currencies. You are encouraged to use the implemented system, which allows for half-automated actualization of currencies. Furthermore, you can, however, rely on manual creation of currencies. Check the bottom part of this page.

Using freecurrencyapi.com

This is a specific add-on and implementation, using the website

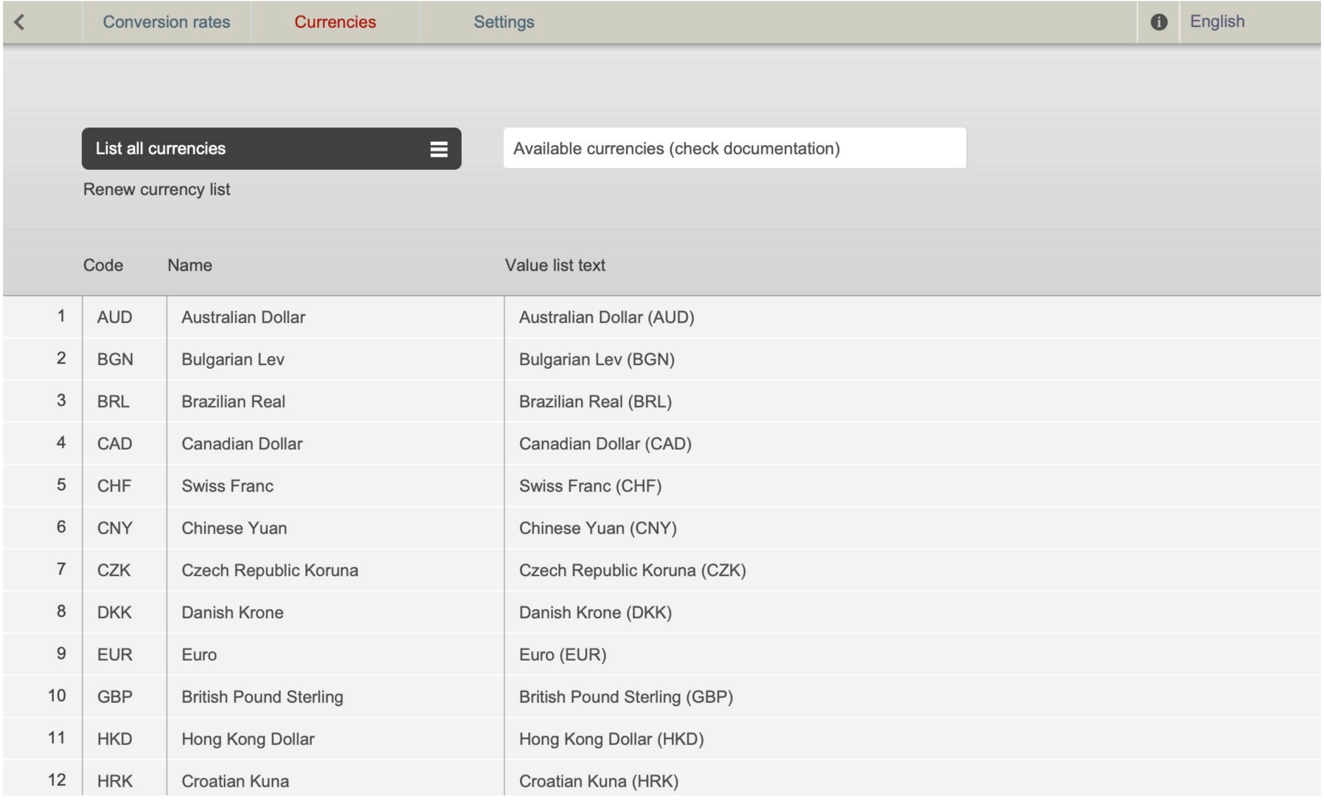
https://freecurrencyapi.com/

Before you can use the implemented automations, you need to create an account on this website and copy the API-key from your account to the appropriate place in FRANK CRM. More on this can be found under: Settings > Getting Started and Settings > Currencies > Settings.

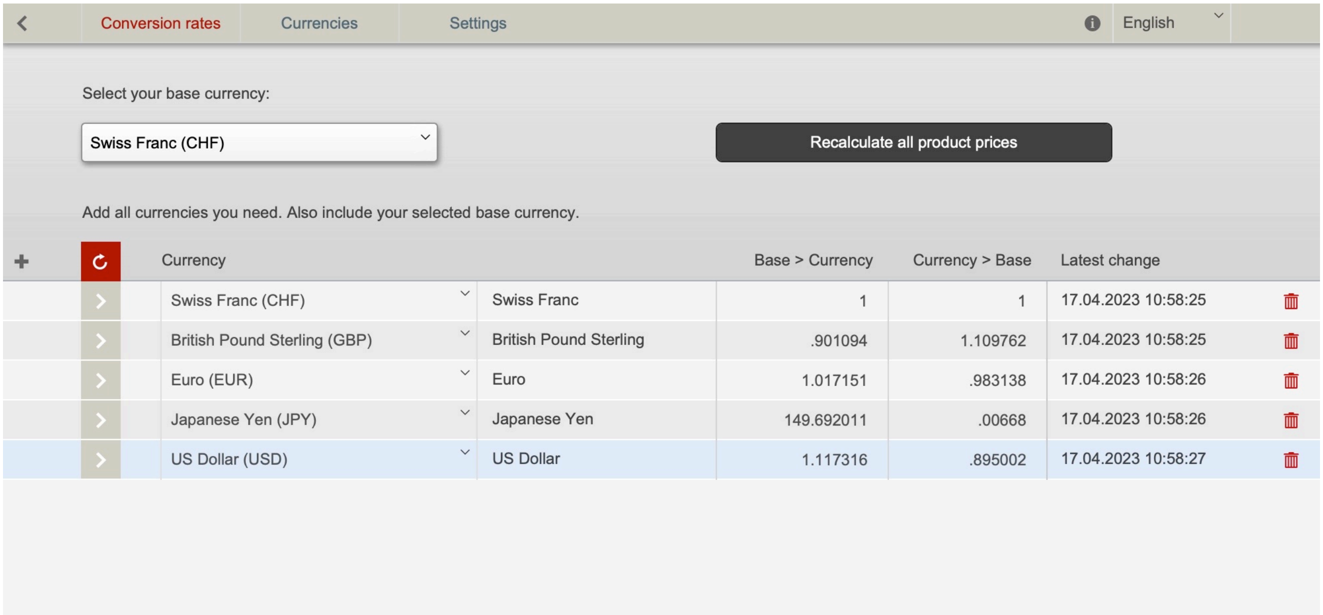


The basic settings apply to FRANK CRM.

Once the API-key is added and the settings are saved, switch to "Currencies". Click "List all currencies" to retrieve the latest list of available currencies. This is all working with a free account, including over 30 of the most widely used currencies.



From this list of currencies, a value list is created, which now can be used to put together a list of exactly those currencies you need from this list.



Create the currencies you need and select the base currency for calculations (usually the currency you are working with most). The conversion rates are to and from your base currency.

This list is now used to create pricing records per currency, for all your products. Depending on the currency set for your sales documents, the prices will be drawn from the appropriate price record for the selected product. This all works automatically.

If you want to update the conversion rates, press the red button to refresh all values.

If you do not want to create an account at freecurrencyapi.com

If you do not want to use automated currency conversions, you can easily set this up manually, for one or even multiple currencies (but without the automated conversions and updates!). Check "Create currencies first".

Special features

Swiss QR Code bill

When you are in Switzerland or Liechtenstein

The Swiss QR Code bill is specific to Switzerland and Liechtenstein. It comes with code generation and a special payment slip and will be displayed on a specific layout made for that purpose. If you are not in Switzerland or Liechtenstein, this is not for you.

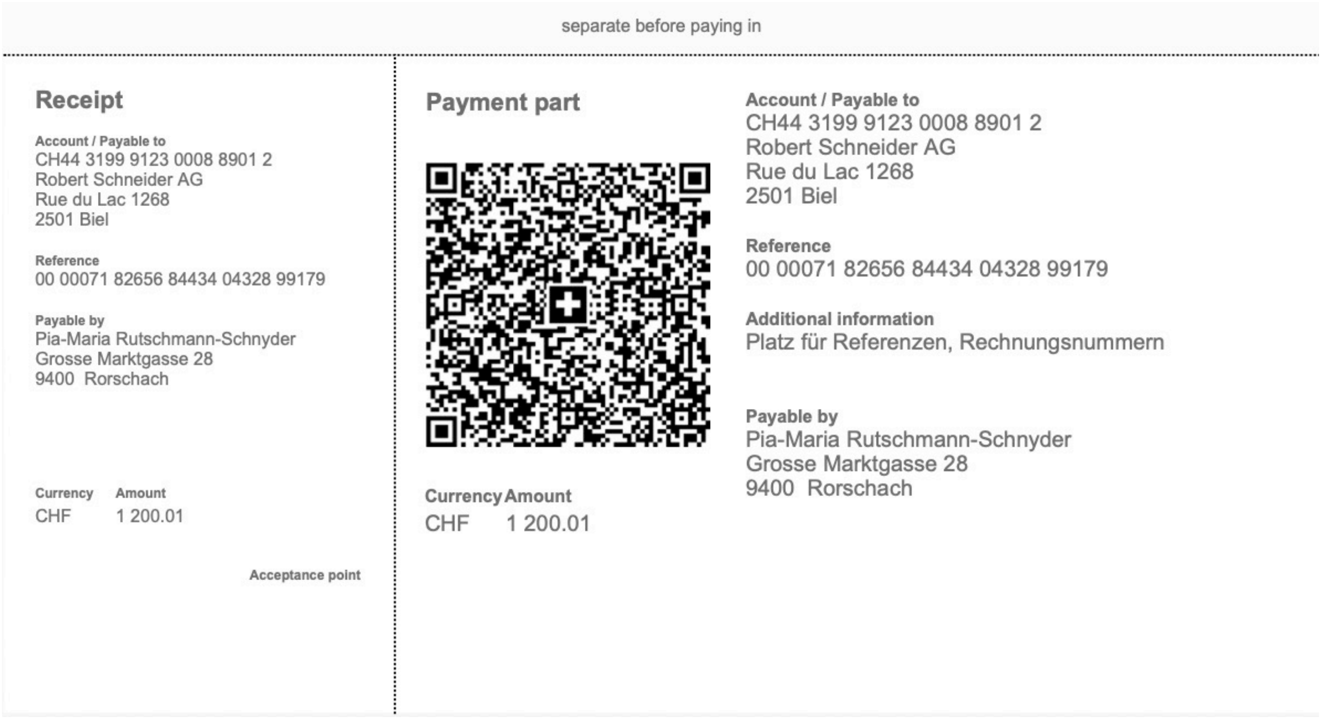
Workflows are per country and document type

FRANK CRM allows you to have different processing options for invoices, depending on the country. Check the country settings for all options per country (Settings > Country settings). For Switzerland and Liechtenstein, the Swiss QR Code Bill has been added, which creates a payment slip with a specified QR Code and a defined layout.

Swiss QR bill

This payment slip is generated by an add-on within FRANK CRM. It uses a specific layout to print this. The module is activated and will **only** be used when the sender and receiver are both in Switzerland and **only** for the document type "invoice". In all other cases, a generic layout will be used. This has been set in the Country Settings. If you prefer not to use it, change it in the Country Settings and switch to a generic layout for all document types.

The Swiss QR Code looks like this:



separate before paying in

Receipt

Account / Payable to
CH44 3199 9123 0008 8901 2
Robert Schneider AG
Rue du Lac 1268
2501 Biel

Reference
00 00071 82656 84434 04328 99179

Payable by
Pia-Maria Rutschmann-Schnyder
Grosse Marktgasse 28
9400 Rorschach

Currency	Amount
CHF	1 200.01

Acceptance point

Payment part

Currency	Amount
CHF	1 200.01

Account / Payable to
CH44 3199 9123 0008 8901 2
Robert Schneider AG
Rue du Lac 1268
2501 Biel

Reference
00 00071 82656 84434 04328 99179

Additional information
Platz für Referenzen, Rechnungsnummern

Payable by
Pia-Maria Rutschmann-Schnyder
Grosse Marktgasse 28
9400 Rorschach

For other countries

FRANK CRM has been set up to enable multiple workflows to create invoices. Whatever other options you would like to see can be created by you or another FileMaker developer and be implemented using the full version of FRANK CRM.

Using another QR-generator

With a full version of FRANK CRM, you can deactivate this option altogether, or replace it with another option you prefer. The currently active add-on has a workflow in three simple steps:

1. Collect the Invoice data
2. Create the QR Code and
3. Create the payment slip.

Now play with it as you deem necessary. The second part can be replaced with a plug-in to create the QR code, for example. This is all up to you.

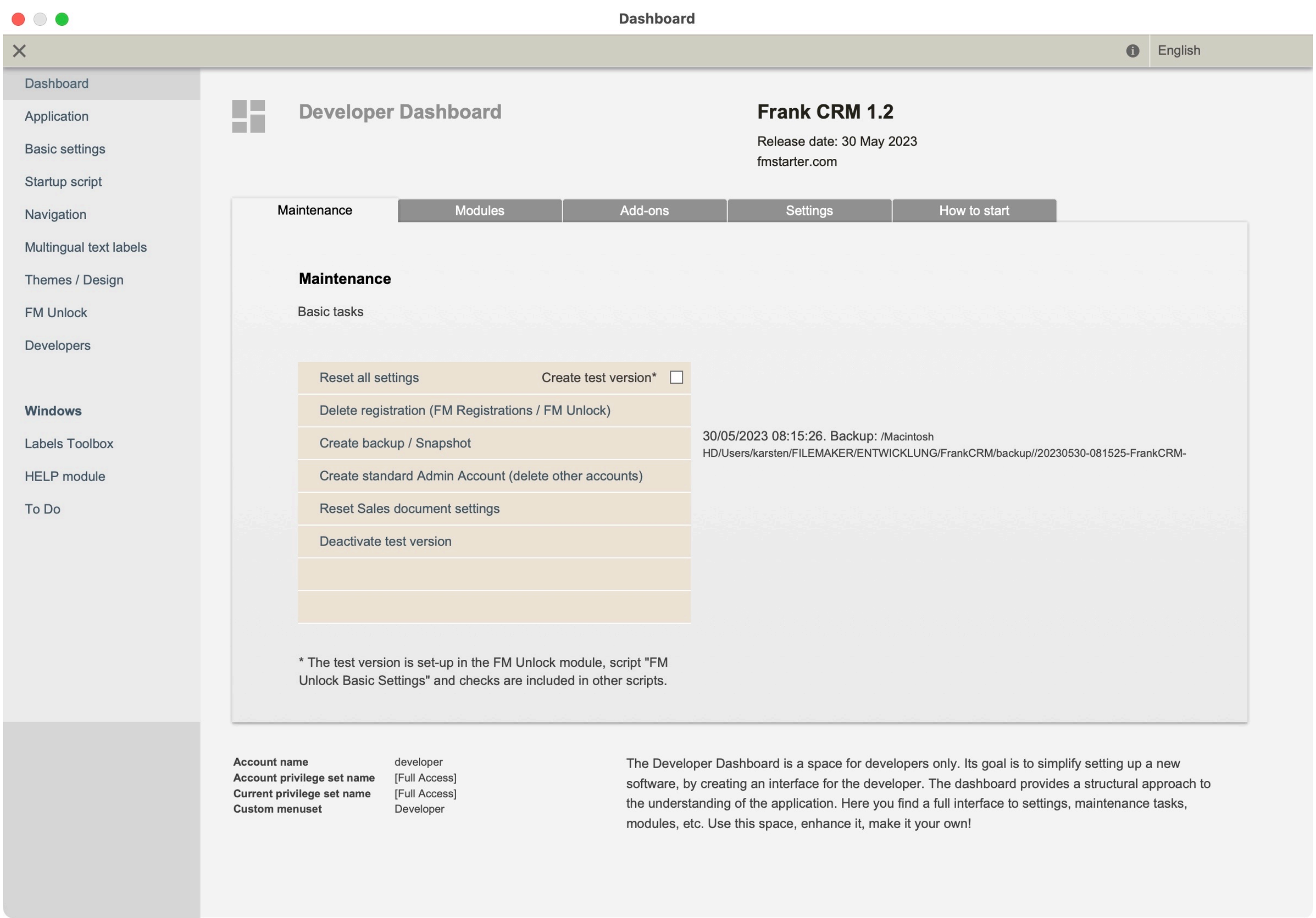
Developer notes

What is the Developer Dashboard?

An interface for the developer

The Developer Dashboard is an interface exclusively for developers. It is like the dashboard or cockpit for quick access to most settings, modules, add-ons, etc. While the Administrator section in the free version has many options to fine-tune the information in FRANK CRM, the Developer dashboard takes it a few steps further, and regulates many basic functions.

The Developer Dashboard is a larger part of the software, accessible through a special window - the Developer Dashboard window. It looks like this:



What is specific about the Developer Dashboard?

- Only accessible in a full purchased version (not part of the free version)
- Only accessible with a developer account
- Pops up in a separate window
- It is the same as in FM Starter, but enhanced with features, settings and options of FRANK CRM.

This is not a comprehensive guide

The very setup of the Developer Dashboard aims to make your life simpler. Instead of hiding settings in scripts or functions, they are accessible through this interface. Many settings have their help texts.

Also, this guide should not replace the FileMaker documentation. This manual is written with the assumption that you are already developing and that these features will help you to get started quicker. However, there is no magic involved. Even though the interface makes many things easier, it still needs to be considered carefully: It's a developers job!

Based on FM Starter

FRANK CRM uses FM Starter as a starting point. Therefore, many features are described in the documentation of FM Starter. For an understanding of the concepts used, it is suggested that you look at this documentation, its videos, etc.

Many standard features of FM Starter can be found described here:
https://fmstarter.com/en/developer-tools/fm-starter/

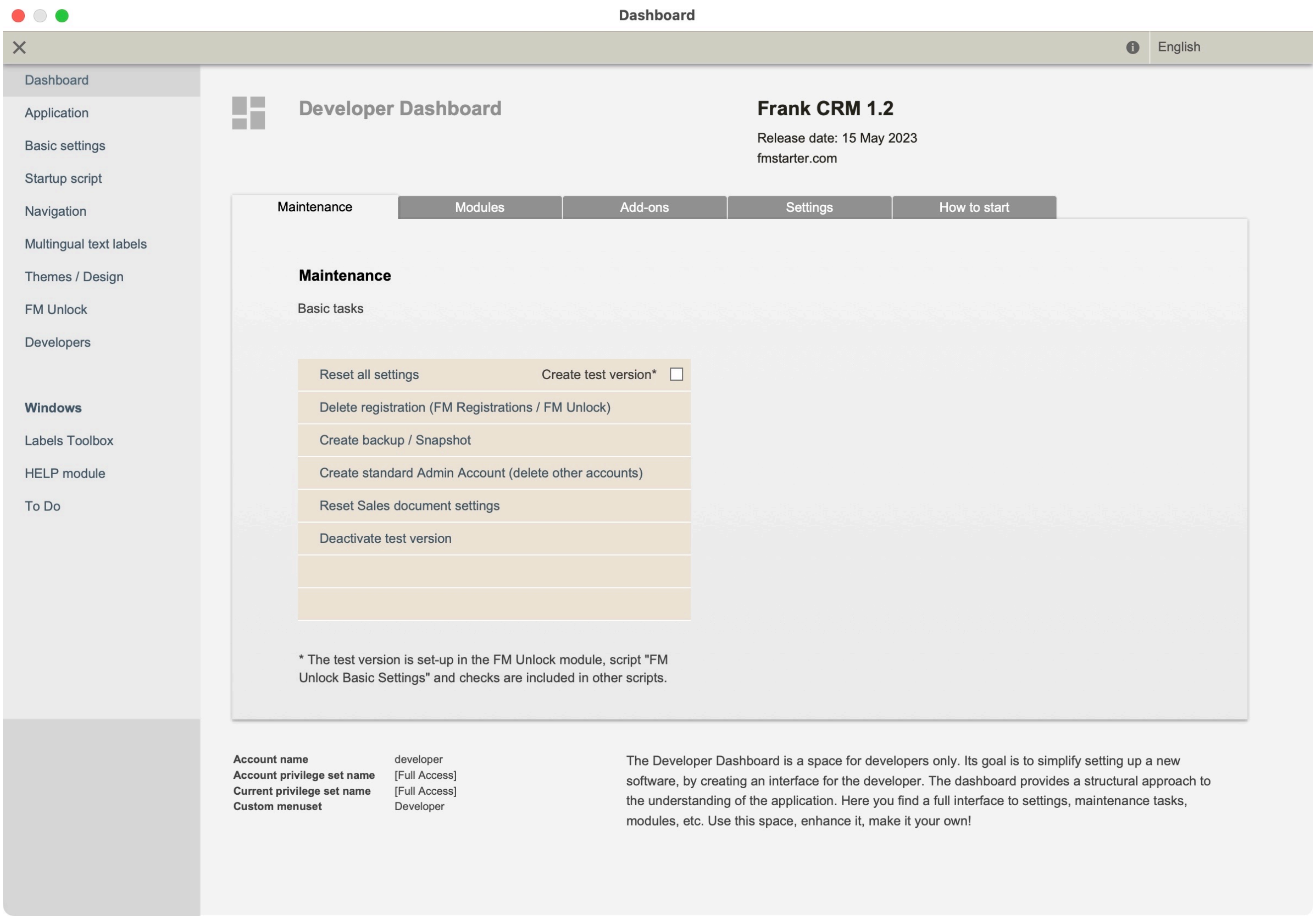
Making things simpler

The goal of FM Starter, and therefor of FRANK CRM, is to make things simpler. Less developing and more configuring. Keep everything neat and clean and well accessible through its own developer interface. It's like a software within a software, an interface uniquely designed for developers, but accessible within the application. It's easier to stay on top of things if everything has its own place and is simple to use.

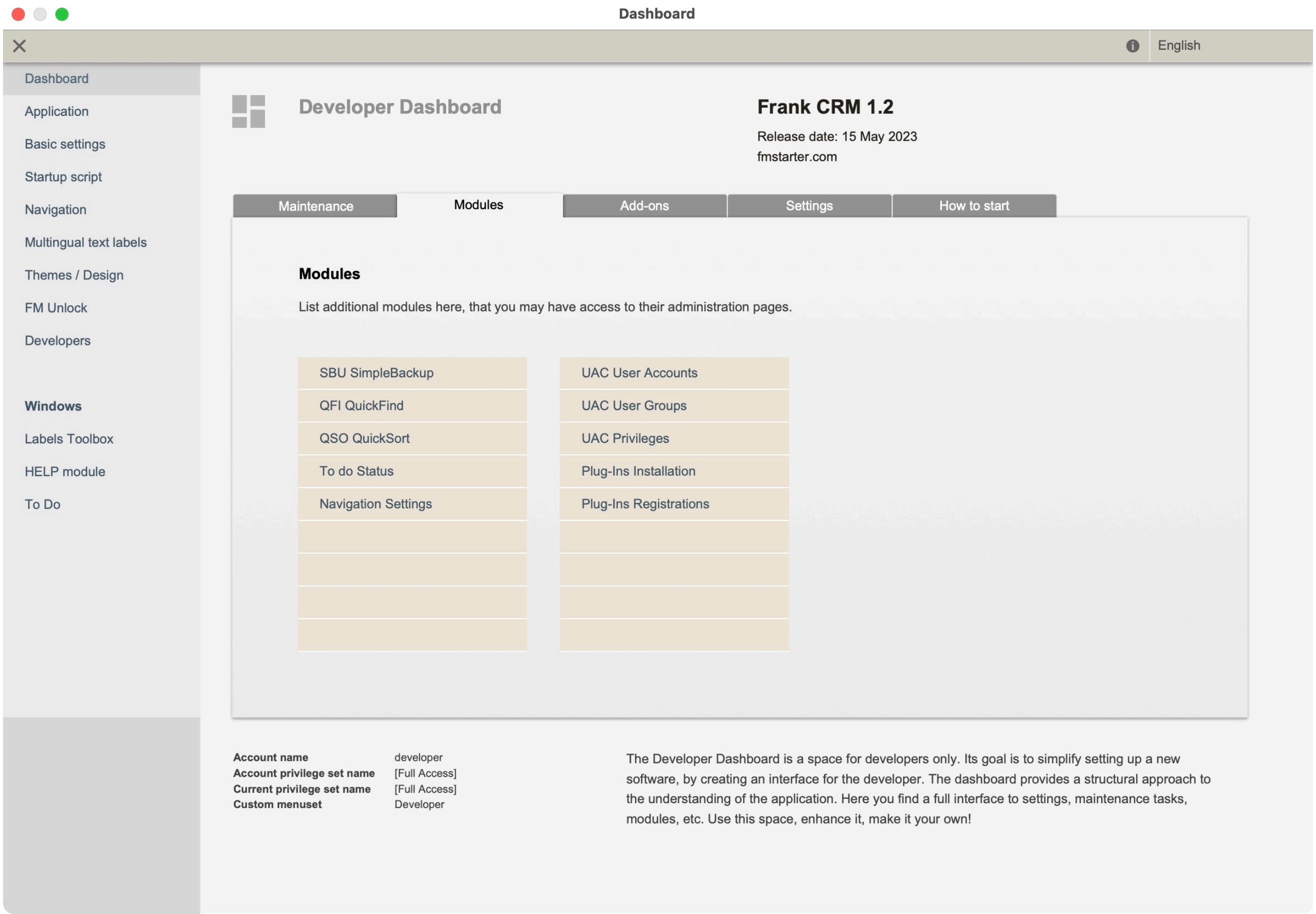
Overview start screen

Here are some screenshots from the Developer Dashboard:

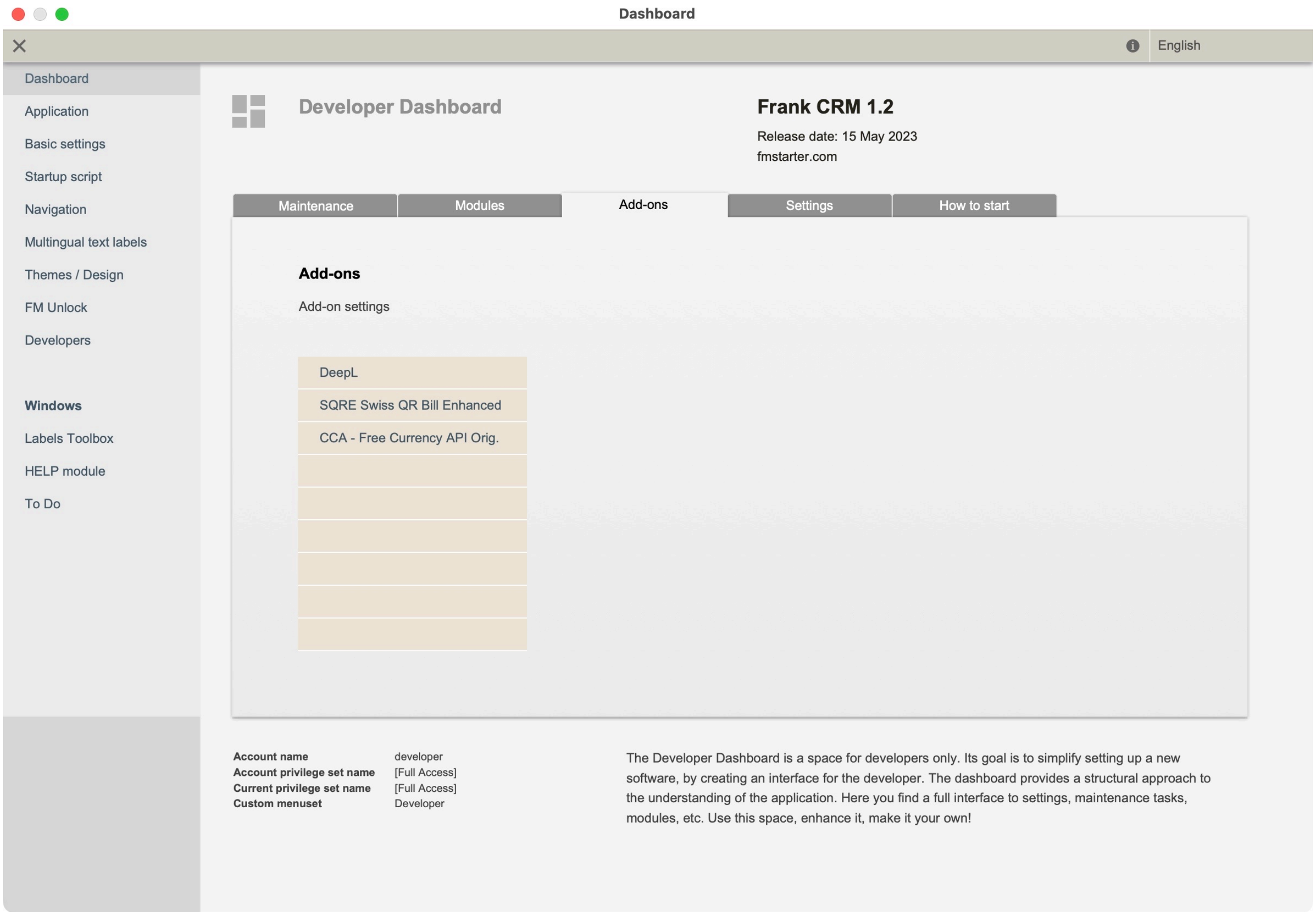
Start screen > Maintenance scripts



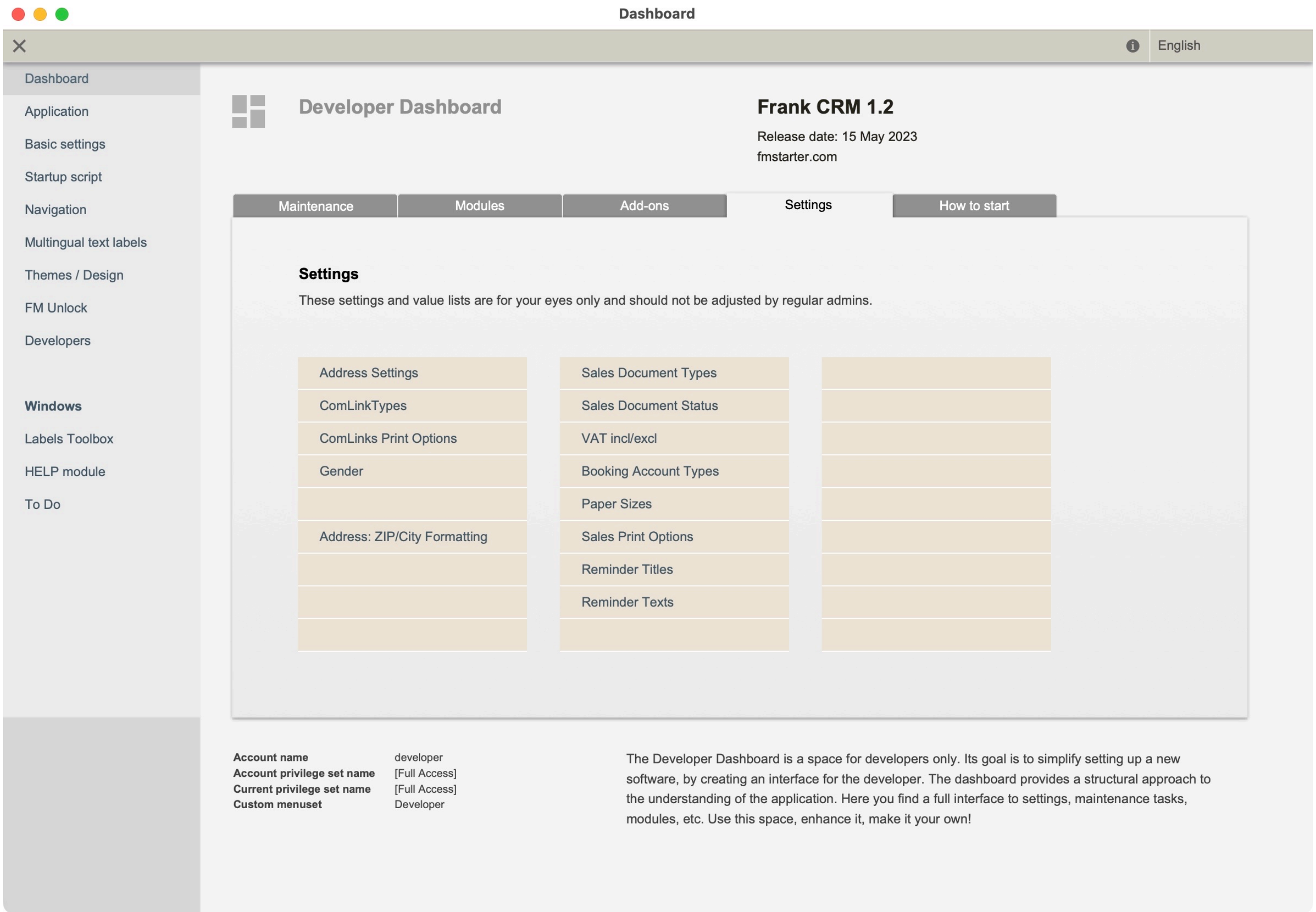
Start screen > Modules



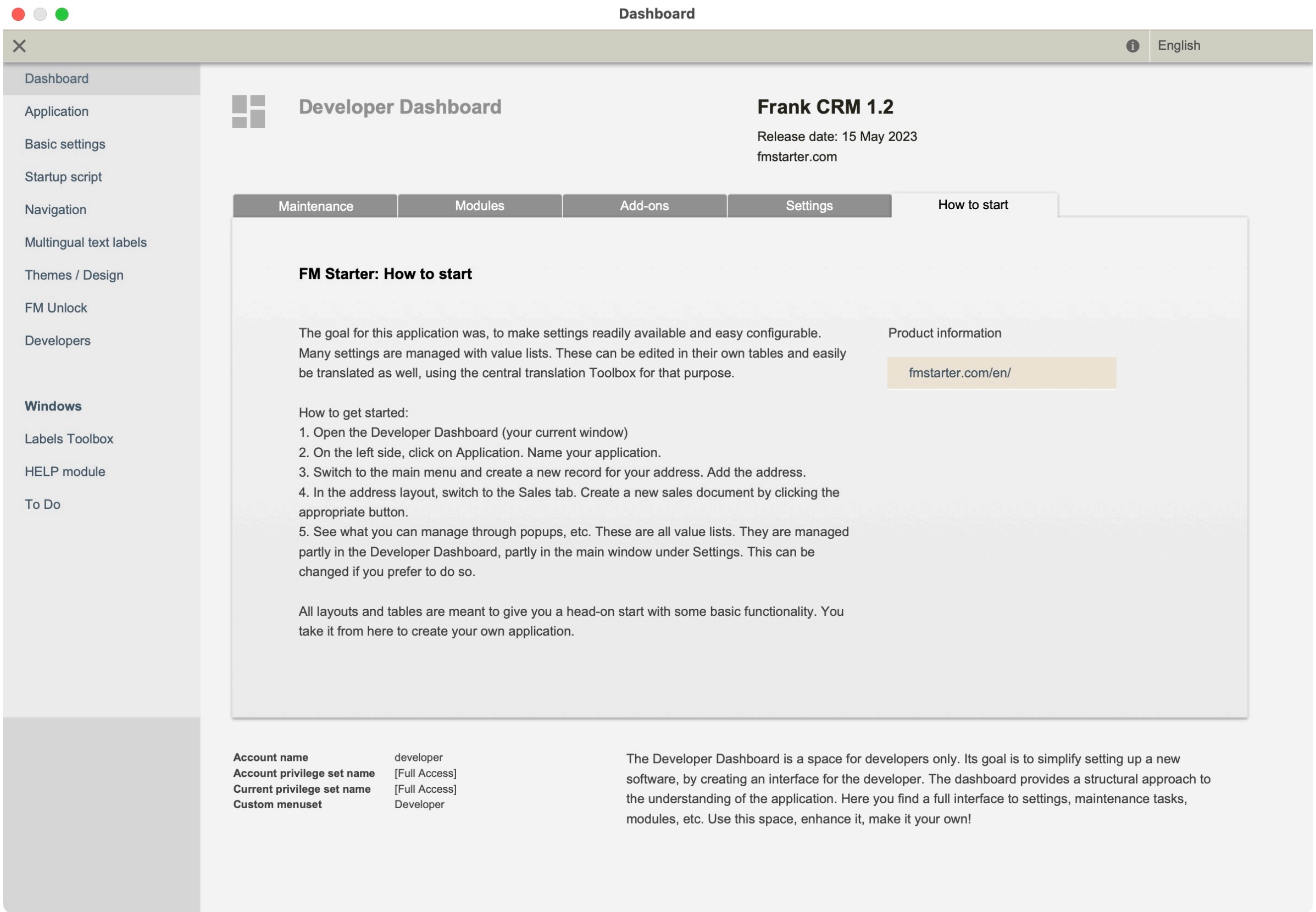
Start screen > Add-ons



Start screen > Settings



Start screen > How to start?



Each of the buttons shown on the start screen triggers a script or leads to a settings page for that specific issue. Many of these settings are simple check boxes, while others need you to create a simple value list - according to your needs.

Value lists

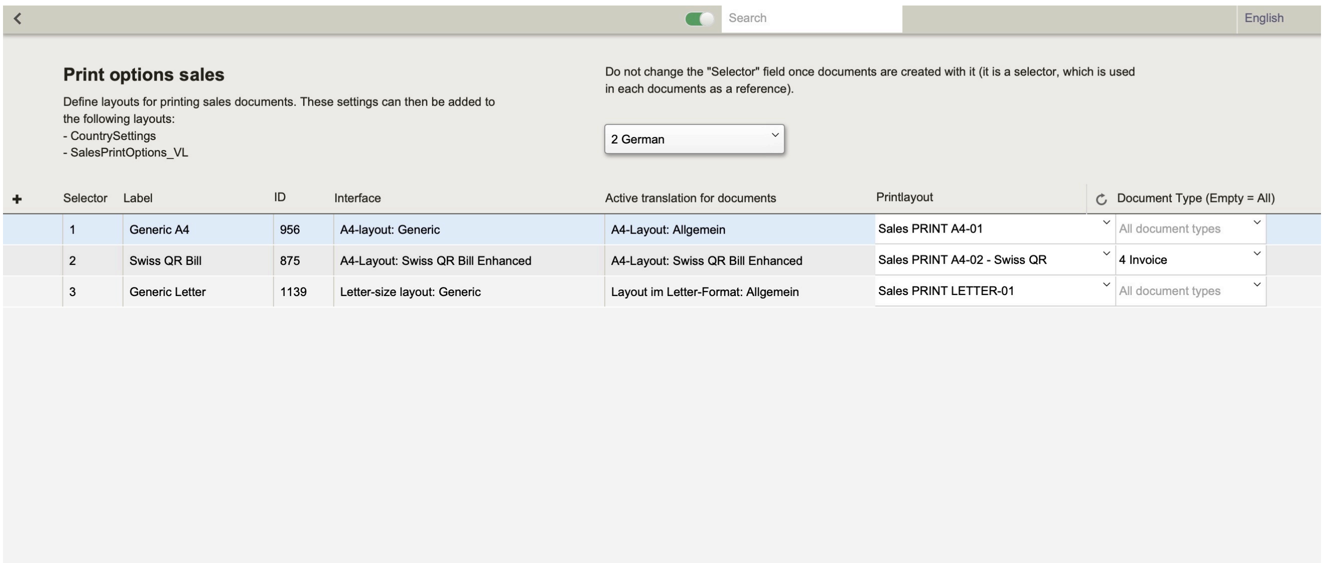
Configurations are simplified by using value lists

Many options and settings are managed through value lists. The advantage is, that these value lists can be multilingual and can be referred to with a simple Selector. As most value lists are managed through dedicated tables, it is simple to add new values.

Selector

The first column in value list layouts has a simple number. This is the "Selector". When you select any option from any value list, you select this number and add it to - let's say - a sales document, regardless of the text label. It's the number that connects, sometimes with text labels, settings, etc. As all texts are made multilingual here, it is never the text which can be reliably referred to, but only the number. Be careful to edit, remove or change any labels or selectors, as this will immediately affect all records with any of these selectors attached.

Example: Print options sales



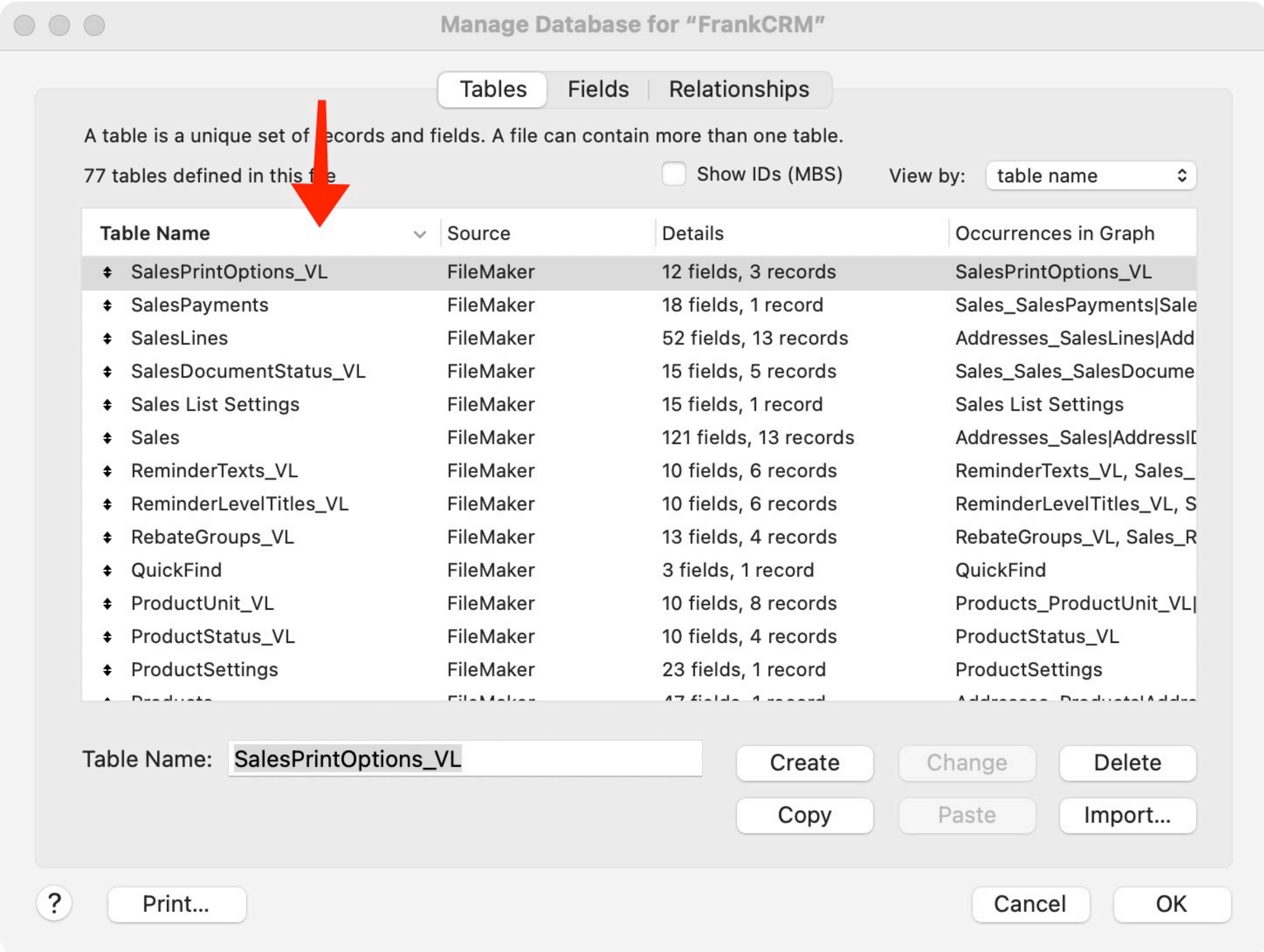
In this table, available print options can be listed. You will find generic layouts for both A4-format and Letter-format, but also an option for the Swiss QR Bill, which has a special layout.

In any sales document, you can now choose any of these layouts through a simple popup-menu. But it doesn't start here. The basic settings per country are maintained in the Country Settings, automatically copied to new addresses and then copied from any address to any new sales document. This means that the correct way to handle this, is to make options available in this value list, then apply it to the Country of choice. From there, for any new address, it will be used as a preset.

This approach gives you maximum flexibility with minimal effort and simple granular fine-tuning.

Recognize the value list tables

The same applies to almost all other settings layouts and value lists. Each value list has its own table in the data structure. The tables for value lists end with "_VL" in the table name.



Tips

- If you need more value lists, copy one of the available tables, also copy an existing layout, switch to the new table and adjust the settings.
- Any new value list with translated values must be added to the script: Modules > MTL Multilingual Text Labels > MTL Settings > MTL Value-List Translations
- Check the documentation of FM Starter if you are eager to learn more: https://fmstarter.com/en/developer-tools/fm-starter/

Structures over rules

Work clever, not hard

It is frequently easier to understand simple structures if compared to rules. Structures can be recognized, while rules must be learned and memorized. There is nothing logical about rules (though you might think they are), as rules are just decisions about meaning.

The difference between structures and rules:

- Structures are much simpler and should be recognizable already on a visual level and make sense by itself.
- Structures are simpler, therefor less specific. It gives orientation, rather than meaning.

For FRANK CRM, the focus is more on structures and explanations, as on a rule book. By favoring simple structures over rule books, FRANK CRM should be easily adaptable by different users.

FRANK CRM does not want to interfere with your preferred developing approach. It does so, by creating smaller units of tables, scripts and layouts. The simpler the connections are, the better it is as a structure and the easier they are to be used and adapted by you. While the way FRANK CRM is created might not reflect your style of developing, you should be able to find your way around quickly.

Let's have a look how that works.

Discover simple structures in FRANK CRM

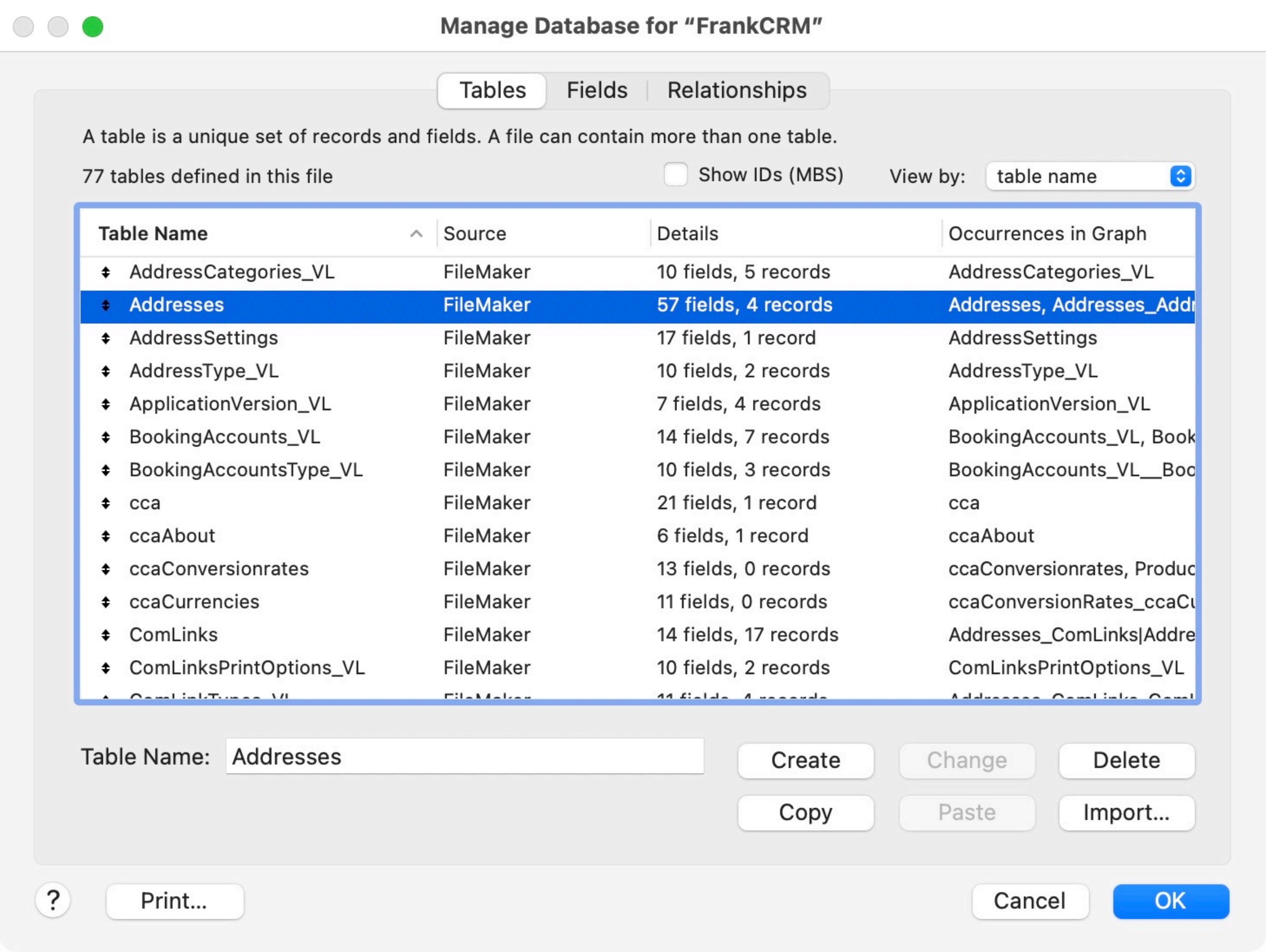
Thinking in units / modules / workflows

Each group of information should have its own table. Therefore, you will not find something like a central table for all settings or all globals, but rather a range of more specialized tables with fewer options. Global variables for, let's say, the address table, are to be found and created within that table, rather than be outsourced to another table.

Each part of FRANK CRM comes with its own tables, scripts and connections.

Tables

For example, the address table is clearly recognizable within the list of tables:



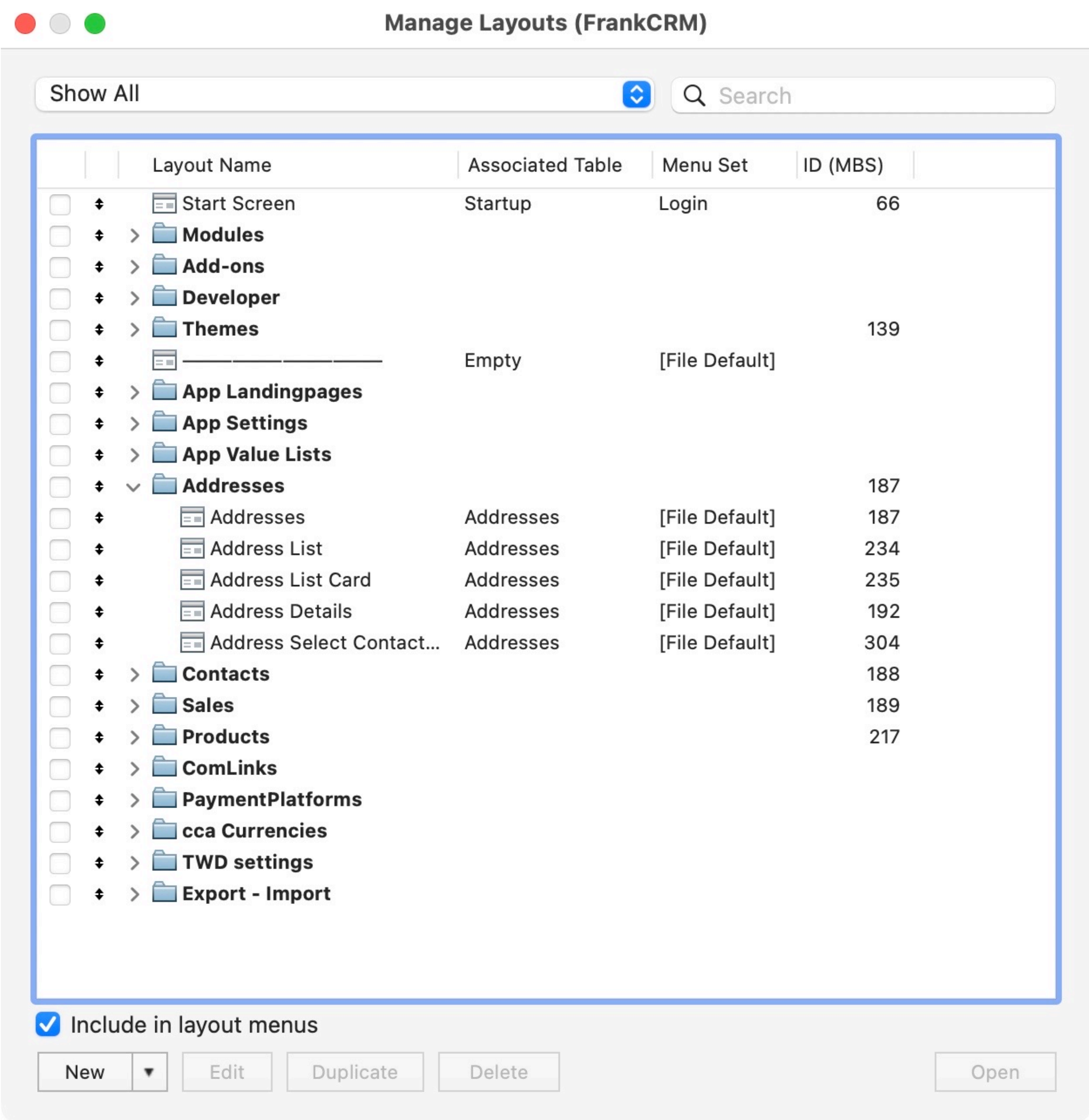
As you see in this screenshot, the word "Address" appears in multiple tables. That makes them instantly related in some way or another.

- AddressCategories_VL is a value list with all address categories
- AddressSettings is a separate table with all Address Settings, but these settings only apply for Addresses.
- AddressType_VL is a value list of all address types.

The same applies for all other tables.

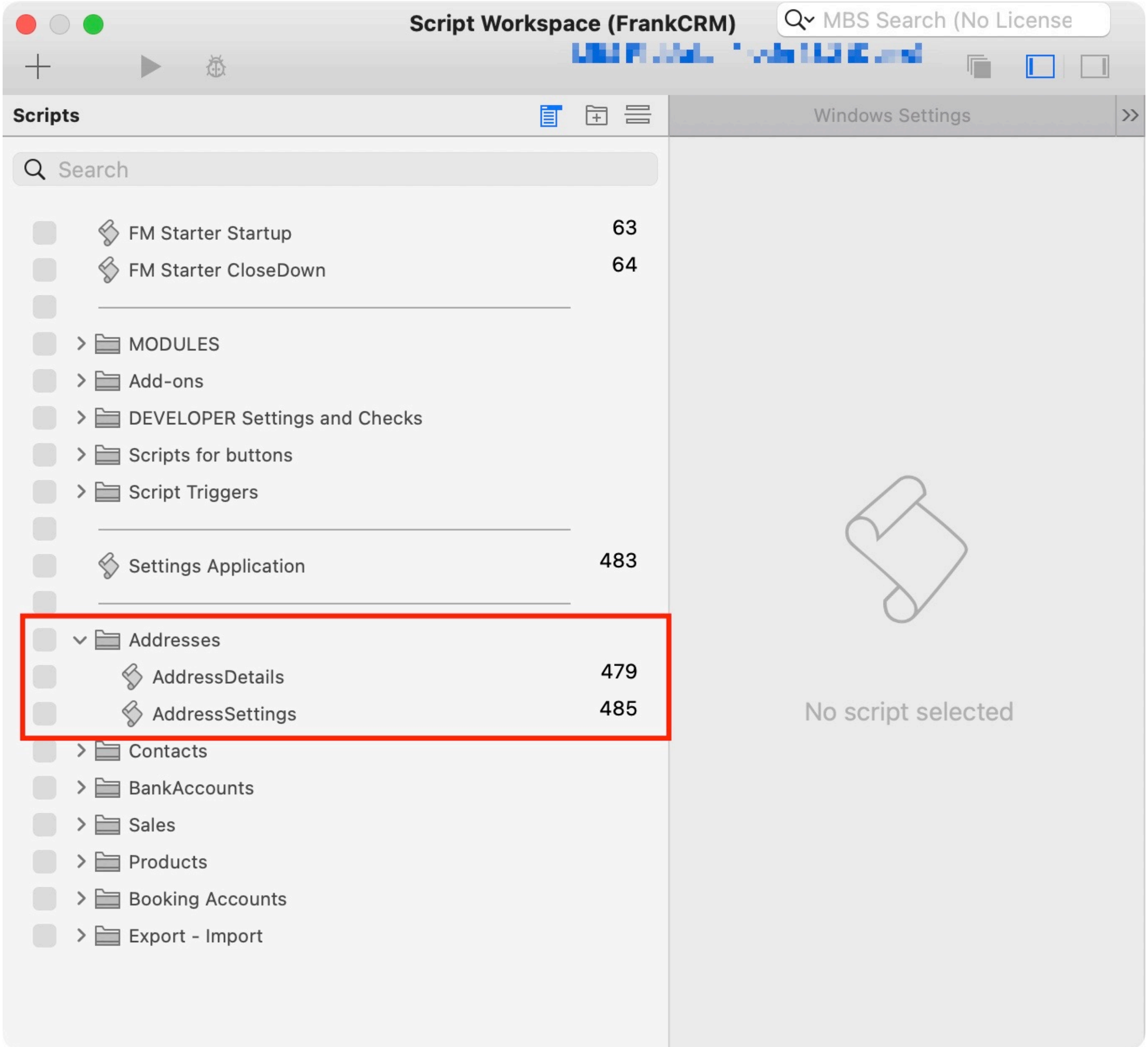
Layouts

The part "Addresses" in FRANK CRM has its own set of layouts, as can be seen in the layout window. Here, each part of FRANK CRM comes with its own layouts. As a rule of thumb: Everything has its own place and is - as much as possible - not linked to anything else.



Scripts

Within the Script Workspace, all scripts are grouped according to the part of FRANK CRM they are related to. For addresses, there were only 2 scripts at the time this manual was written. You will find all workflows for addresses in these two scripts.


Script Workspace (FrankCRM)
MBS Search (No License
Scripts
Windows Settings
Search
FM Starter Startup 63
FM Starter CloseDown 64
MODULES
Add-ons
DEVELOPER Settings and Checks
Scripts for buttons
Script Triggers
Settings Application 483
Addresses
AddressDetails 479
AddressSettings 485
Contacts
BankAccounts
Sales
Products
Booking Accounts
Export - Import
No script selected

Anchor-buoy relations

FRANK CRM tries to avoid relationships, but if they are helpful (they frequently are), the Anchor-Buoy-Principle is used. To use this for your own development, you need to have a full version of FRANK CRM. This information therefore is helpful for developers, who want to enhance FRANK CRM with their own logic and functions.

The Anchor-Buoy-Principle is an approach to relationships between tables, which is used by most developers today. It is simple, reliable and easy to work with. It defines where your layouts are and how you relate from those layouts to other information.

This is how it works:

Table occurrences

Each table can be represented by one or more table occurrences. These can be created on the Relationship Graph, which is part of the window to manage databases. When you create a new table, a new table occurrence will be created, along with a layout built on that table occurrence.

Relationships between tables

Table occurrences are also used to create relationships. The Anchor-Buoy-model of creating relationships relies on these table occurrences. It is a model to style your table occurrences and understand what they are used for.

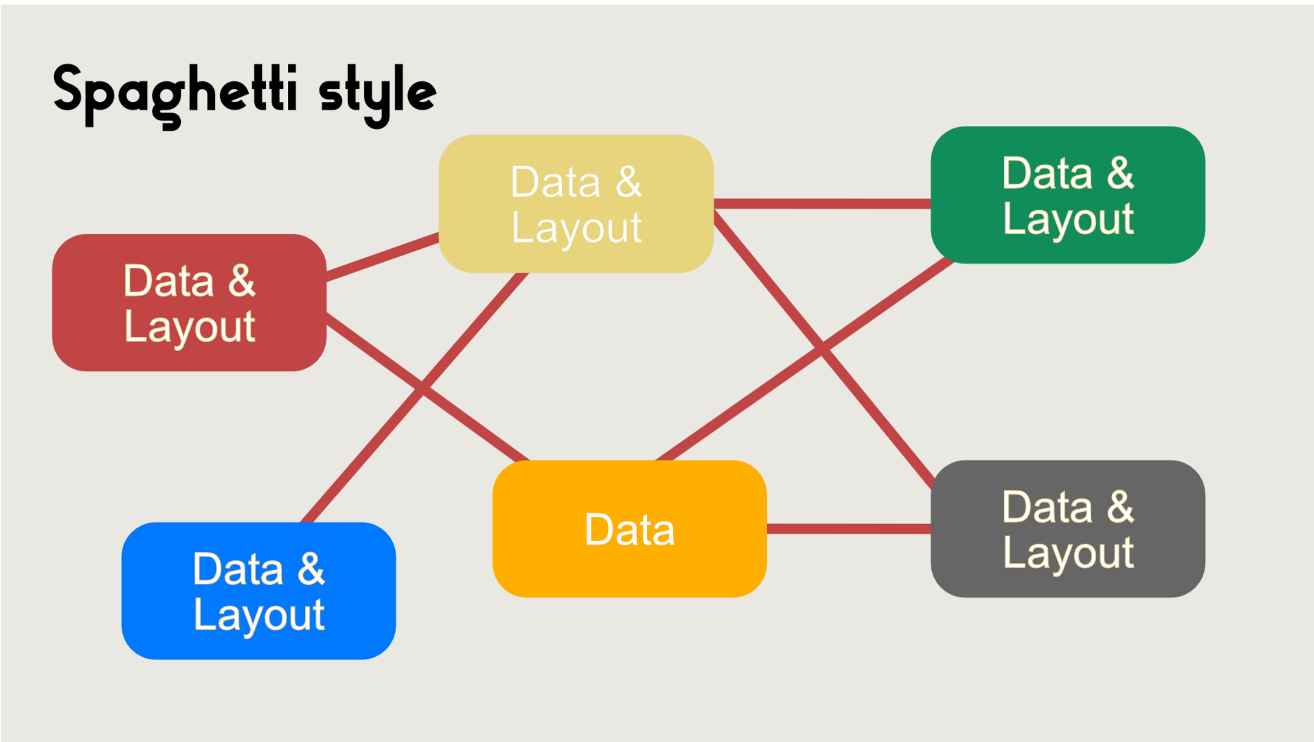
Role management for relationships

Within the model, these occurrences get one of two tasks: Anchor or Buoy. It is important to see that this is not a function, but a way to use table occurrences. There is no setting for this. It is an understanding and a structure you can adopt. Probably most FileMaker developers have adopted this model and also FRANK CRM uses this model.

Some table occurrences get the role of Anchor, while other table occurrences get the role of Buoys. By defining these roles, you can simplify your development, get hold of the relationships, understand where your layouts should be and what relationships are for.

Spaghetti style belongs to the past

Without such an idea as Anchor and Buoy, you can do whatever you want in FileMaker. The software is quite forgiving. Over time, though, one tends to get a messed up relationship graph, where everything is connected with everything else ("spaghetti-programming"). This makes it complicated to work with, and the more the solution grows, the messier it becomes. Finding and fixing errors can become a nightmare, and development will need more and more time.



Every color represents a different table. They are connected directly with each other. Layout can be anywhere. All tables are dependent on relationships, but these are not organized. It might work for some time, but it will get messier quickly. The Anchor-Buoy-model tries to fix this mess, by structuring its approach. It is role management for relationships, so to speak, which proved to be helpful in many parts of development as well as for maintenance purposes.

Anchors and Buoys

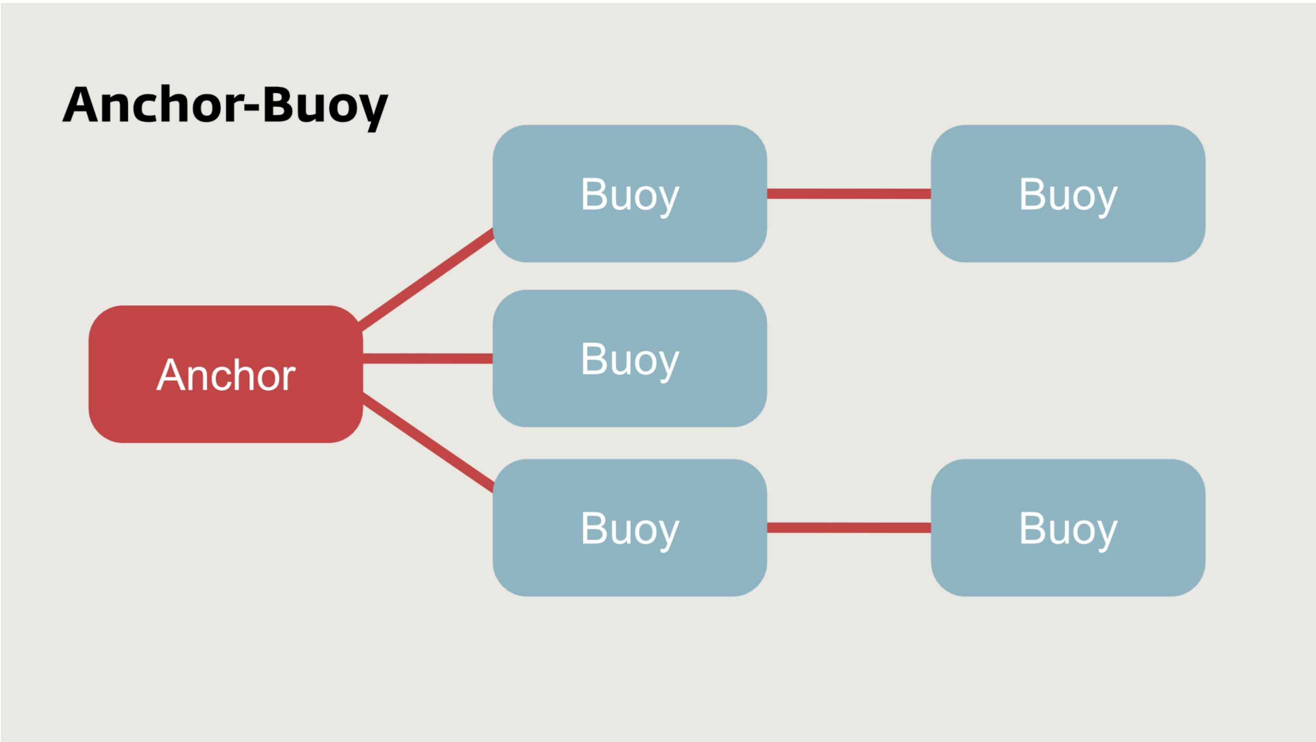
Every single table will need an occurrence in the relationship graph. Otherwise, you cannot work with it.

The first occurrence of any table *could be* an Anchor. Name the Anchor as the table. If your table is called "Addresses", that's also the name of your Anchor. That's not a rule, but an approach! Let's assume we take the first occurrence of each table as an anchor. What does that mean?

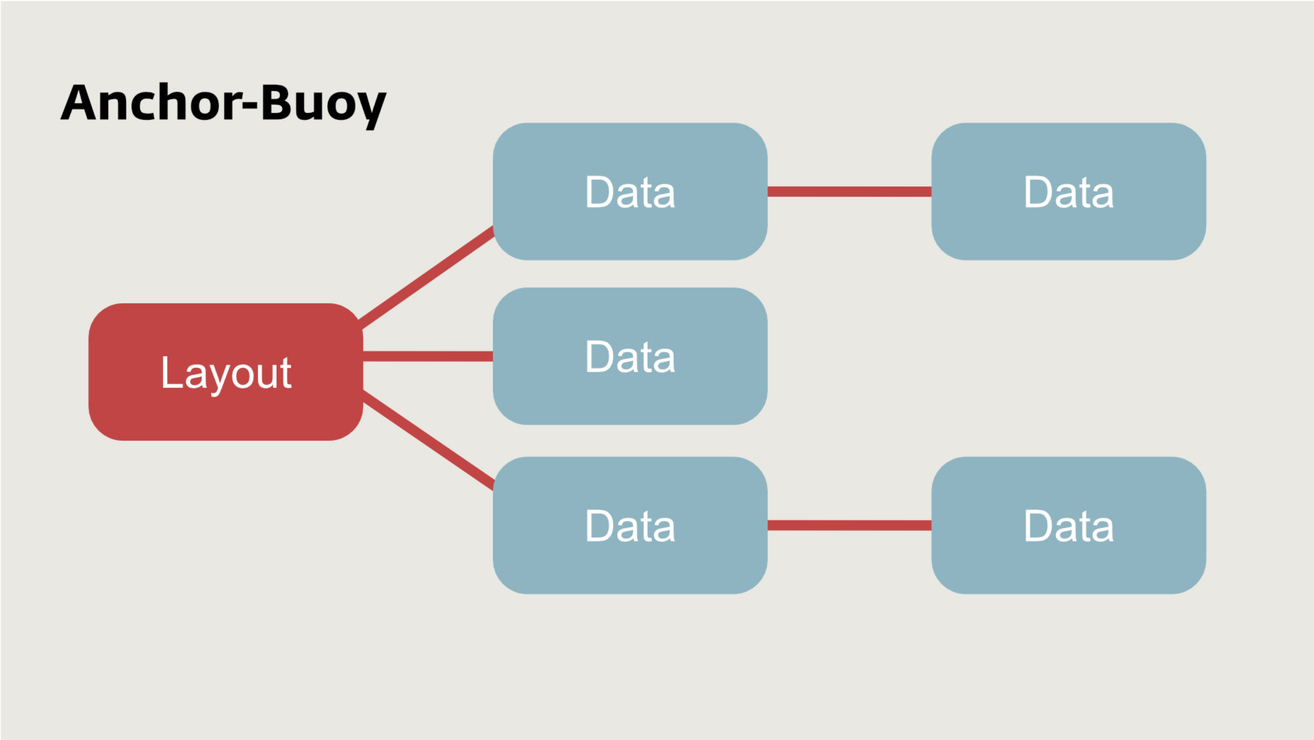
- Anchors are starting points for each table
- It is not possible to connect two Anchors
- All table occurrences linked to an Anchor are called Buoys
- Each table has 1 Anchor and as many Buoys as needed from that layout
- Each table is like an island, with a single Anchor and its Buoys
  - There is an island around each table (if needed)
  - There is the Addresses-Island, the Contacts-Island, the Sales-Island and the Sales-Items-Island, for example
  - No longer is everything connected with everything else, but all relationships are within "Islands", consisting of a single Anchor and as many Buoys as needed.
- Layouts can **only** be on Anchors
- Layouts can **never** be on Buoys

- All Layouts are on Anchor occurrences, while Buoys are used to get and write information, to show records from another table through a portal, or to navigate to a different dataset, using a Buoy-relationship.
- Usually, Anchors are placed left, while all the Buoys are placed right of the Anchor (this makes it easy to recognize the two).

It might look like this:



Translate this to where you should make your layouts:



This is a clear improvement over the Spaghetti-style programming. You always know where your layouts are. Also, it is always clear which relationships can be used and what will be possible through those.

Wherever you are on a **layout**, that should be based on the **anchor** occurrence for that table. Now, there might be **multiple** layouts for the same Anchor occurrence. That's fine. It's not about the layout, but about the table occurrence behind the layout (in FileMaker, every layout must have a table occurrence attached). Thus, if you have an edit page plus a list page, based upon the same Anchor, you can use the **same relationships to get or write data, or to navigate** to a related table.

How to navigate

In FileMaker, you go to a related record (or: set of records) through a relationship. As the relationship is between two table occurrences, you might be tempted to use the table occurrence where you refer to (GoToRelatedRecord) and create a layout on that page. **Don't do that!**

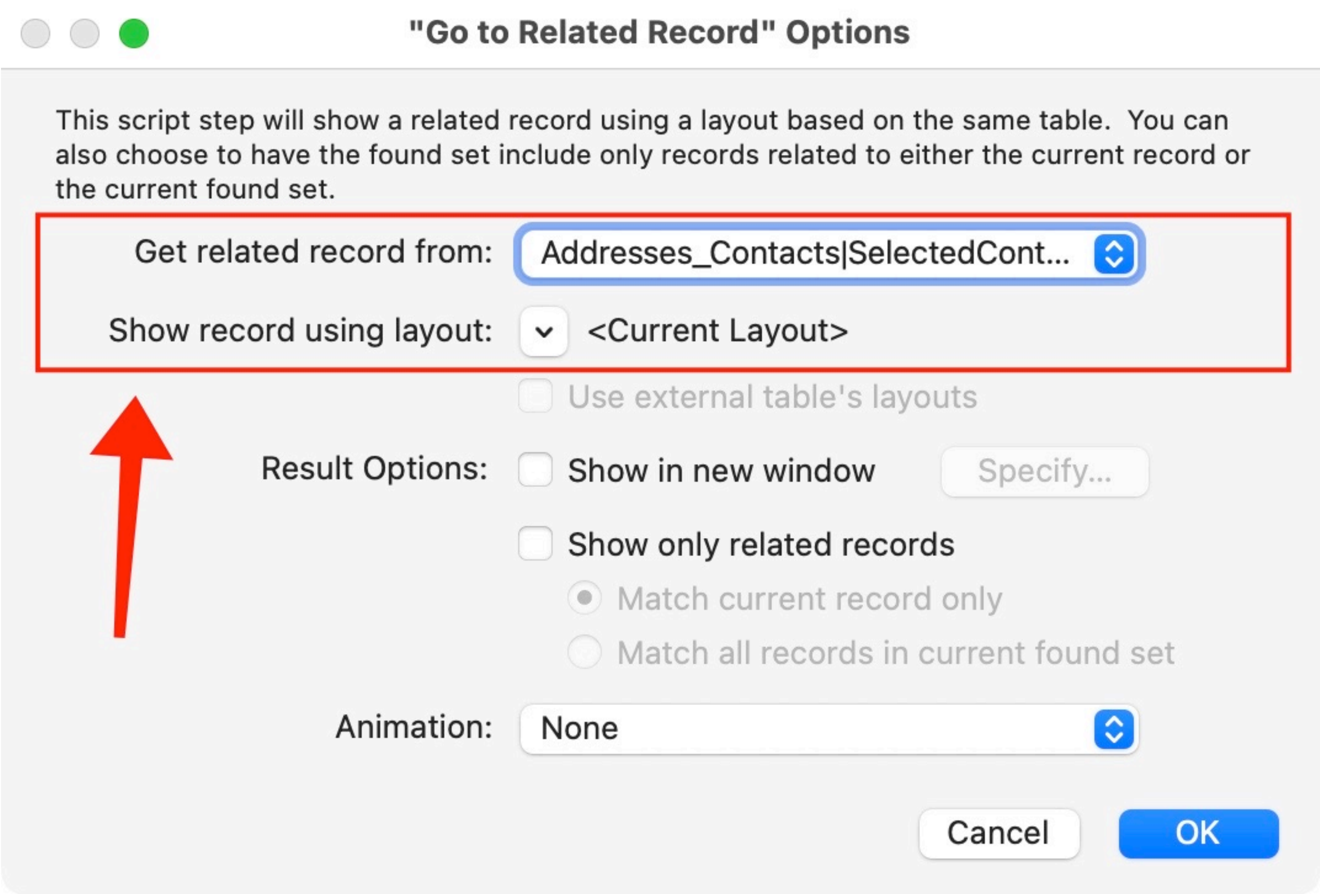
Within the concept of Anchor-Buoy, you can use Buoys to navigate, but you have to select another Anchor page for the layout you want to direct to. Let's see how this is done:

Let's assume, we're on a page of the table Addresses. There are some Contacts related to this address, and there is a relationship in place, which I named:

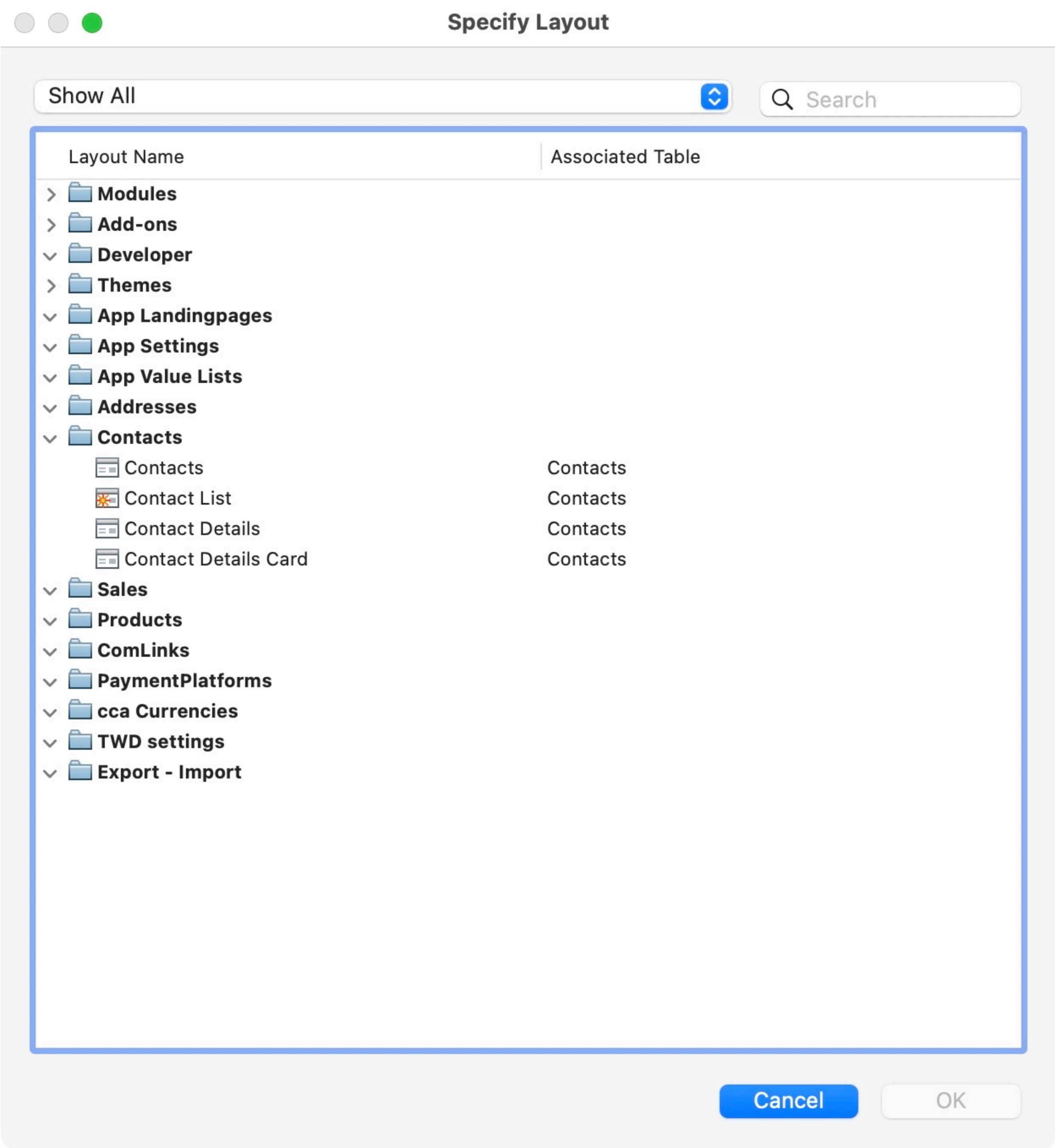
- Addresses_Contacts | AddressID

This would read as: "This is a relationship from the table Addresses to the Table Contacts, show all Contacts with the same AddressID". You have to create this relationship, before you can use it. It is created in the Relationship Graph. I assume you know how this works.

To show all related contacts from an address, you can, for example, create a button with a single script step "Go To Related Record". It looks like this:



In the popup "Get related record from", all available relationships from this Anchor page are shown. Select one. When you select a relationship, you will be shown a list of layouts for that table you are referring to, like this:



As we were referring to the Contacts table, only layouts with the Contacts table will be shown. Select one.

As all layouts, per definition, are created on Anchor table occurrences, you will land on another Anchor page and layout for this script step. It is like jumping from one island to another.

You have more and fewer relationships

Using the Anchor-Buoy-Model will give you more and less relationship. Let me explain.

Let's go back a few steps first. In a Spaghetti-style relationship graph, everything is connected with everything. That is creating a mess, but the total number of connections is probably just the minimum (for the total number of connections). In such a scenario, it is highly unpredictable what will happen to any other table, once you start writing data somewhere. As everything is connected, things get complicated quickly. But as a number of connections, it's most likely just what you need.

In an Anchor-Buoy-Model, you work with separate islands of connections. Let's assume we are on an Address layout, using the Anchor-occurrence of the Addresses table. When you jump to a related contact, as shown above, you effectively switch to another island, called Contacts. When you are on a contact layout, it's a different island from the address island. What you do is "island hopping".

Now assume you want to jump back to the address of that contact. That is a bit of a challenge, as in this world, all connections are unique to a single island. Connections from other islands (table occurrences) are not available. Each island needs its own connections, which cannot be used from other islands. You have to create a new relationship, from Contacts to Addresses. It might be named like this:

- Contacts_Addresses | AddressID

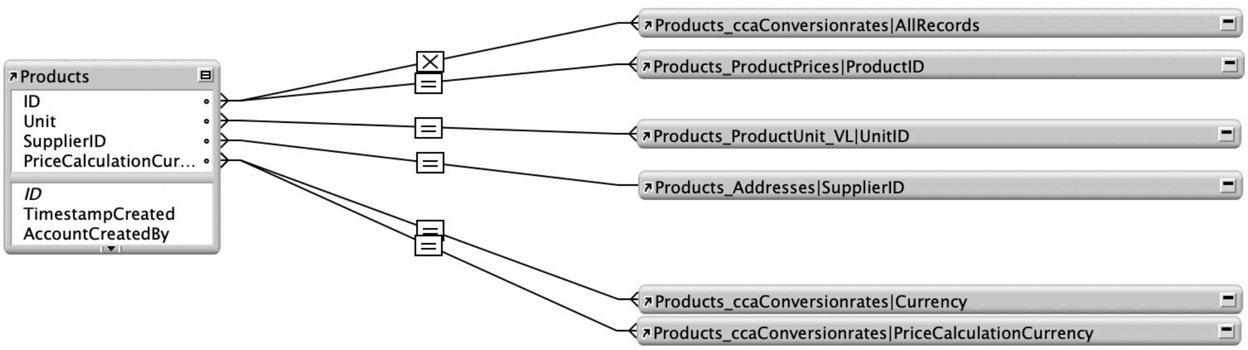
This relationship reads like: "This is a relationship from the table Contacts to the Table Addresses, through the reference/key AddressID". This will allow you to jump back to the first island.

For each situation, you have a different connection between the same tables. This doubles in certain scenarios the number of relationships, as there might be one for each island. Therefore, an Anchor-Buoy-Model tends to have more relationships in general. However, this comes with a benefit.

The benefit of the Anchor-Buoy-Model lies in the **limited** number of relationships per island. You have to deal with way fewer relationships, as in a Spaghetti-style model. It is always clear where you are, and it is always clear which are the relationships that are of importance within the context of your Anchor layout. Fewer relationships also gives you more performance in your solution. It can make a huge difference, especially with larger databases.

Working with the Anchor-Buoy-Model

If you are new to this approach, you can look at the way it is used in FRANK CRM. In the Relationship Graph, it shows like this:



The Anchor is "Products" on the left side. Buoys are on the right side. Layouts are on the table occurrence of "Products". Naming of the Buoys as done before lists the originating table occurrence first, then an underscore "_" to the next table in the relationship (and so on), followed by a pipe "|", after which the criterion or field is listed, according to which the relationship was built. This approach, if done consistently, will auto-sort relationships in popup menus and always tell you, what the relationship does.

Working with the Anchor-Buoy-Model needs a bit of structuring, but developers implement the details to their liking. Some might write these things in small case, others in "camelCase" or still different. Some might want to use colors in the Relationship Graph, but others don't or do it differently. It's not about the rules, but about how to make your life simpler. Find your preferred method of describing things. Make it your own.

The beauty of using the basics of this model lies in the ease of use, not just for you, but also for other developers who might have to work with your solution later.

Performance

Using the Anchor-Buoy-Model will always speed up your solution. If everything is connected with everything else - as in the Spaghetti model -, the performance of your solution will be effected. The Anchor-Buoy-Model simplifies many things and therefor speeds up your solution.

What do you think? Can this model help you build a reliable solution faster?

How scripts are set-up

Creating your workflows

Scripts are an essential part of FileMaker. Here you define your workflows, as used by buttons and triggers.

I have seen many solutions with hundreds if not thousands of scripts, frequently with just one or two script steps. The approach in FRANK CRM is slightly different and as a result, there are substantial less scripts.

Scripts are ideally related to a certain environment

You could compare this with the Anchor-Buoy-Model, where layouts always are on a specific table occurrence. This makes it simpler to create, manage and use relationships. It is an approach. Similar, you could choose to limit most of your scripts to a certain layout. That is also an approach. There is no rule which defines you have to do this. It might be of benefit, though.

If you consequently do this, it is easy to find the script for a specific layout. Simply look for a script with the same name as the layout. In the next paragraph, I show how a single script can fulfill multiple functions. As many scripts are rather small, it is possible to combine many smaller tasks into a single script for a specific layout, table occurrence or environment.

Of course, certain scripts will be very long. There might be a need to add more scripts. How you do this is totally up to you. It proved to be very efficient, though, to limit scripts to certain layouts and the related tables. If needed, you can execute another script from within your local script. This seems to be more work, but it effectively helps you to separate tables, layouts, workflows more easily.

Separation helps you to avoid the "everything-is-connected-with-everything" horror story. Just as for relationships, this is a trap for scripting as well. If you have a workflow using several tables and "islands of bliss", you could - for example - write the part for each island, then execute those single scripts in a larger workflow script, using the "perform script" script step multiple times within a workflow script.

Scripts fulfill multiple purposes

The basic idea is that scripts can fulfill multiple purposes. Only a few scripts will be very long and complex. Often, scripts are simple. To limit scripts to certain layouts or table occurrences makes it easier to isolate workflows, find the scripts you need to look at, and to enhance or edit those scripts.

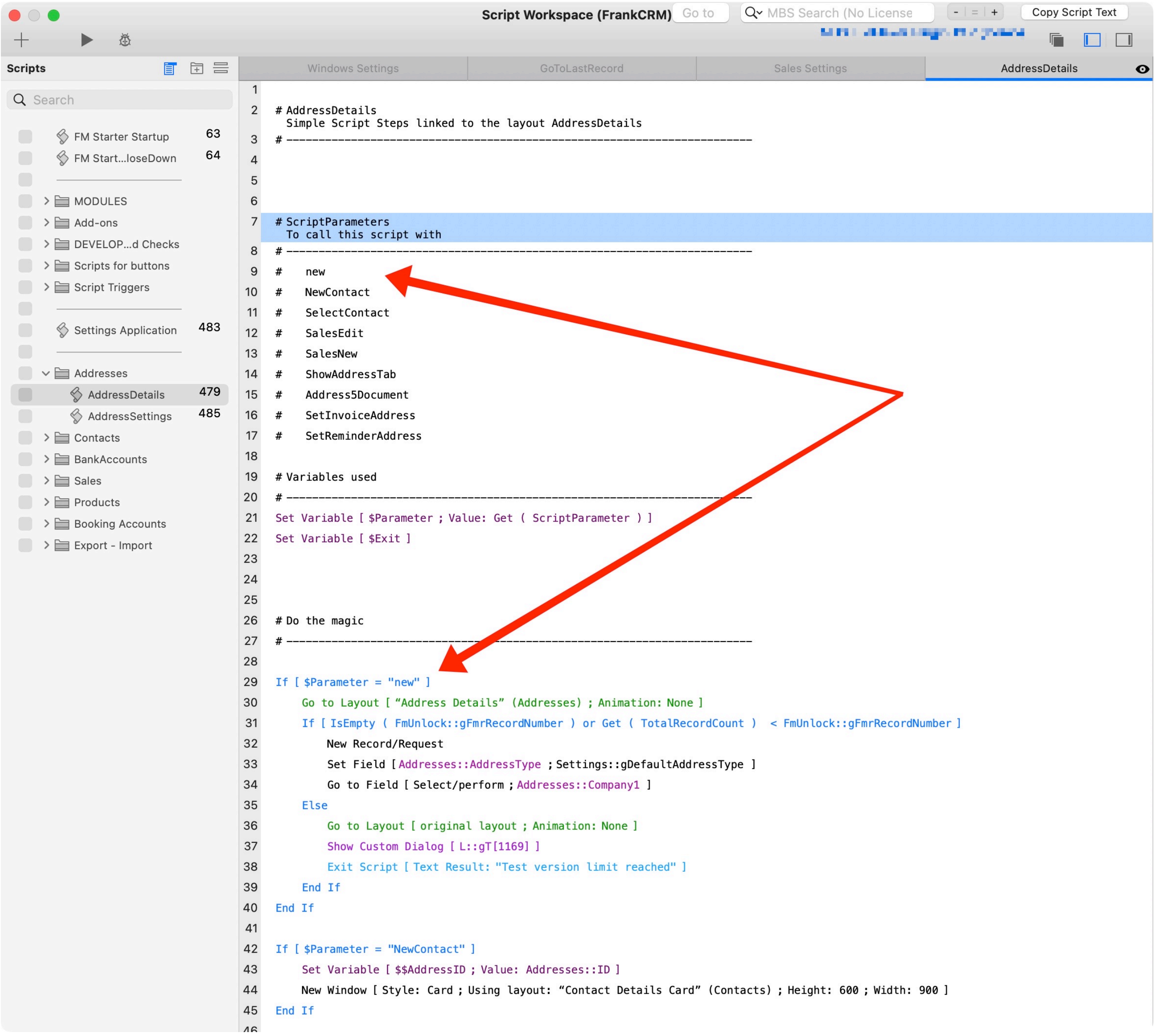
Here is the approach as used:

- Scripts are created for certain layouts (or: table occurrences)
- A single script can carry out multiple tasks, triggered by different script parameters.

Most scripts in FRANK CRM do not do anything if called without a script parameter. With a script parameter, though, a specific part of that script is carried out. The script parameter by which the script is called is used as information to carry out a certain IF-request. Only that part is then executed.

```
IF ( Get ( ScriptParameter ) = "ReadSettings" )
        [Now read your settings]
END IF
```

This simple approach will read your settings if you call the script with "Read-Settings". The logic to perform the task is added within the IF-request. A script can thus have multiple script parameters and multiple IF-requests.



In this screenshot, the script can be called with any of the following parameters:

- new
- NewContact

- SelectContact
- SalesEdit
- SalesNew
- ShowAddressTab
- Address5Document
- SetInvoiceAddress
- SetReminderAddress

This single script performs 9 different tasks, all from the layout Address Details. That is the structure. It's not so much about "what", but more about "where". The goal is that you find the proper script quickly and immediately see which part of the script must be looked at.

Scripts have notes in them

Wherever helpful, you will find notes directly within the scripts. This makes it easier to understand what the script parts actually do.

```
If [ Products::IsAutomated = 1 ]
    # PRODUCTNUMBER
    # prerequisites
    Set Variable [ $ProductDefinition ; Value: ProductSettings::gProductNumberDefinition ]
    If [ PatternCount ( ProductSettings::gProductNumberDefinition ; "<Index>" ) > 0 ]
        Set Variable [ $Index ; Value: ProductSettings::gIndex + ProductSettings::gIndexIncrease ]
        # update serial number field
        Go to Layout [ original layout ; Animation: None ]
        Set Field [ ProductSettings::gIndex ; $Index ]
    End If
    # build and set the product number
    Set Variable [ $ProductNumber ; Value: Let ( [ a = $ProductDefinition ; b = "ABCDEFGHIJKLMNOPQRSTUVWXYZ" ; c
    Set Field [ Products::ProductNumber ; $ProductNumber ]
    Perform Script [ Specified: From list ; "ProductSettings" ; Parameter: "save" ]
    # --
    # DESCRIPTION
    # The next variable will be picked up later in the script to process that part
    Set Variable [ $ThisProcess ; Value: "updatedescription" ]
Else
    Set Field [ Products::ProductNumber ; "" ]
    Set Field [ Products::ProductDescription ; "" ]
```

Enhanced multilingual options

In comparison to FM Starter, FRANK CRM has an enhanced option for multilingual text labels.

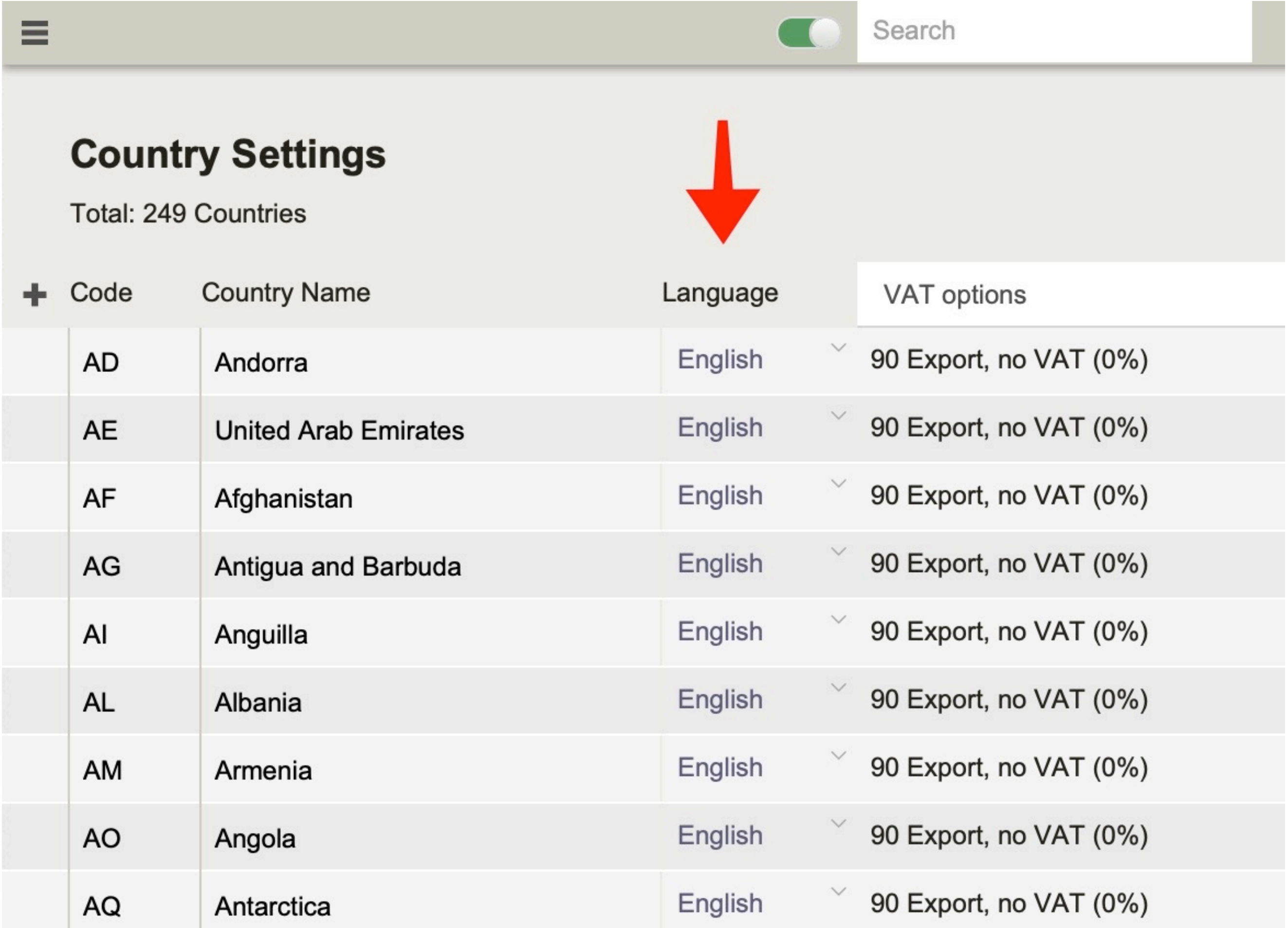
Documents can have a different language as the interface

Within FM Starter, the languages are meant for the interface. In FRANK CRM, it is possible to create a separate language for documents. This is already implemented in FRANK CRM.

This is how it is currently implemented:

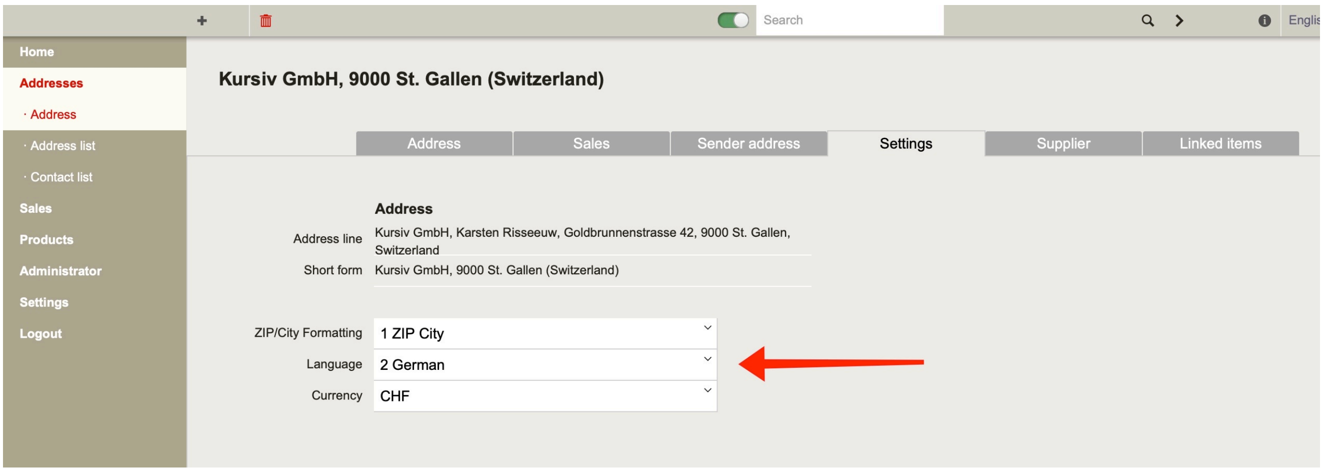
1. In the free version, there are 5 languages (English, German, French, Spanish, Japanese). This can be enhanced in the full version.
2. Each of these languages can be assigned as the standard language for a country. From here, when you create a new address, the language for the selected country will be copied to that address.
3. Each address will have a language code. When creating a sales document for that address, the language setting is copied to the sales document. It is easy to change the setting both at the address of the customer or in the settings of the document.
4. You yourself can work with an English interface, but create a Spanish, Japanese or German document on the fly and fully automated.

The setting in the country settings

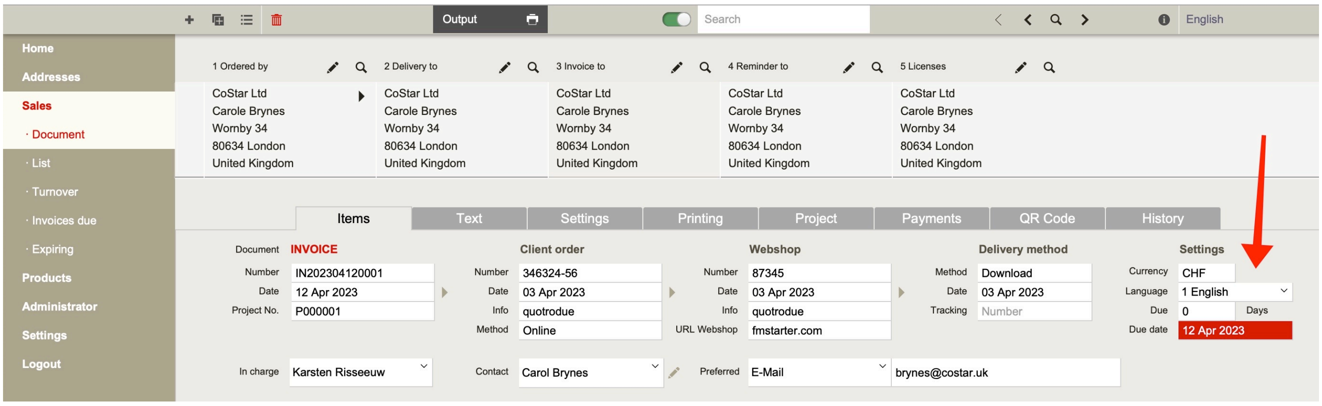


Choose the language from the popup menu provided.

The setting in the address



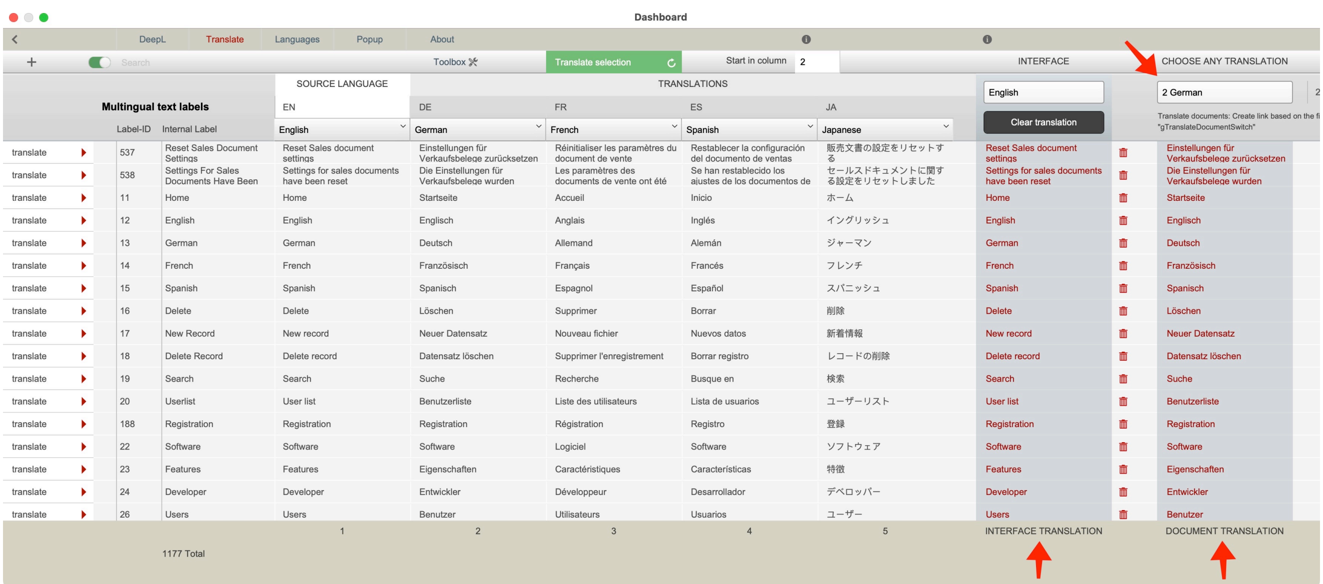
The setting in a sales document



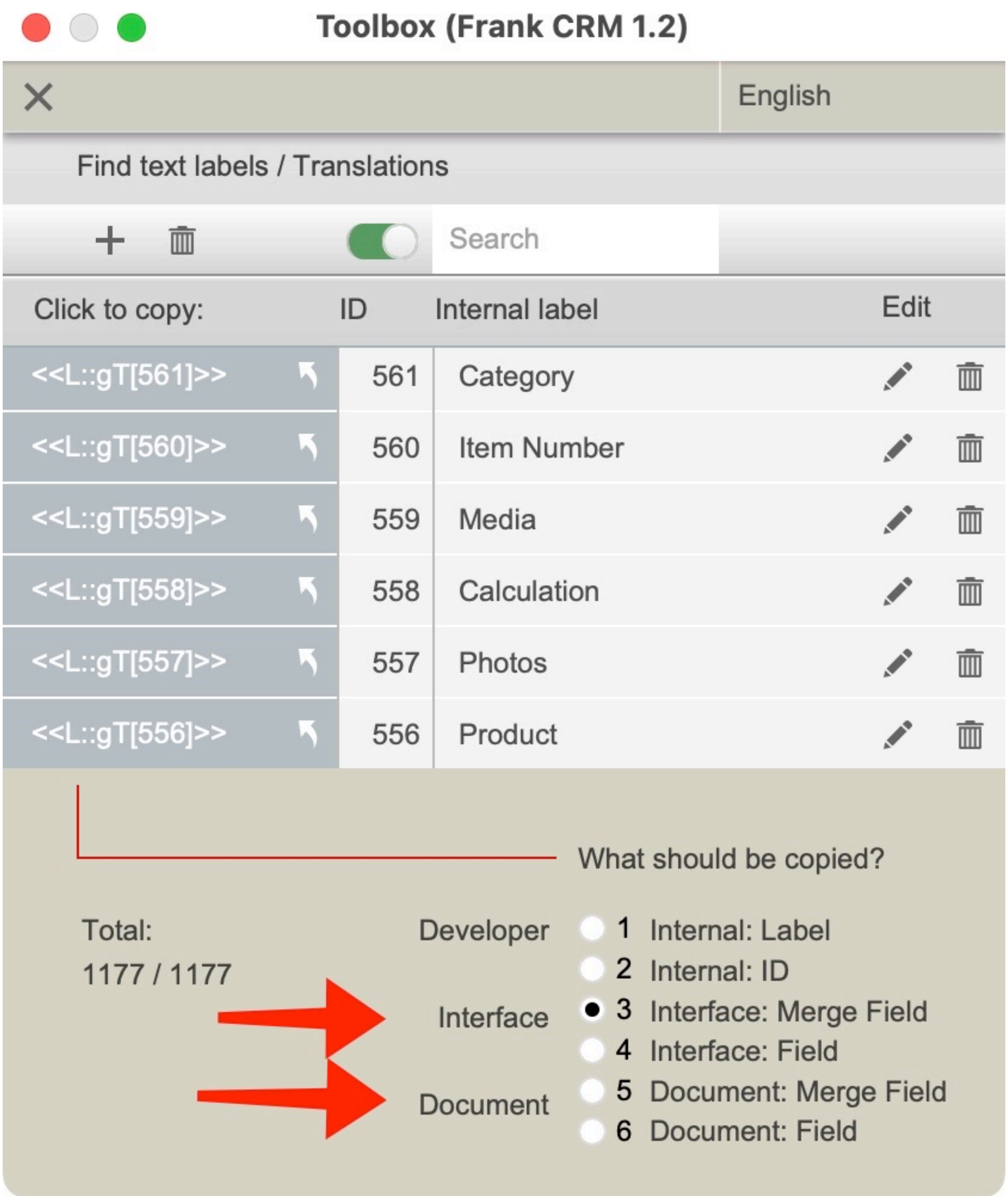
Changing the setting in a sales document will be used for the next output, be it for preview, print or PDF. This setting also applies for reminders sent, or for any e-mail about upcoming expiry dates for licenses or services, as these depend on the invoices created.

Multilingual text labels - the module

In the Developer Dashboard, on the left side, you can choose the Multilingual Text Labels. You land on the module page, which has been enhanced (in comparison to FM Starter) with a new field for document translations.



All translations are also managed using the Toolbox window. It will allow you to quickly copy any textlabel, by copying a merge variable, field or similar. In FRANK CRM there are two options, for the interface and for the document.



Any regular interface label will be created like is shown here:

<<**L::gT**[NUMBER]>> (with the field L::gT)

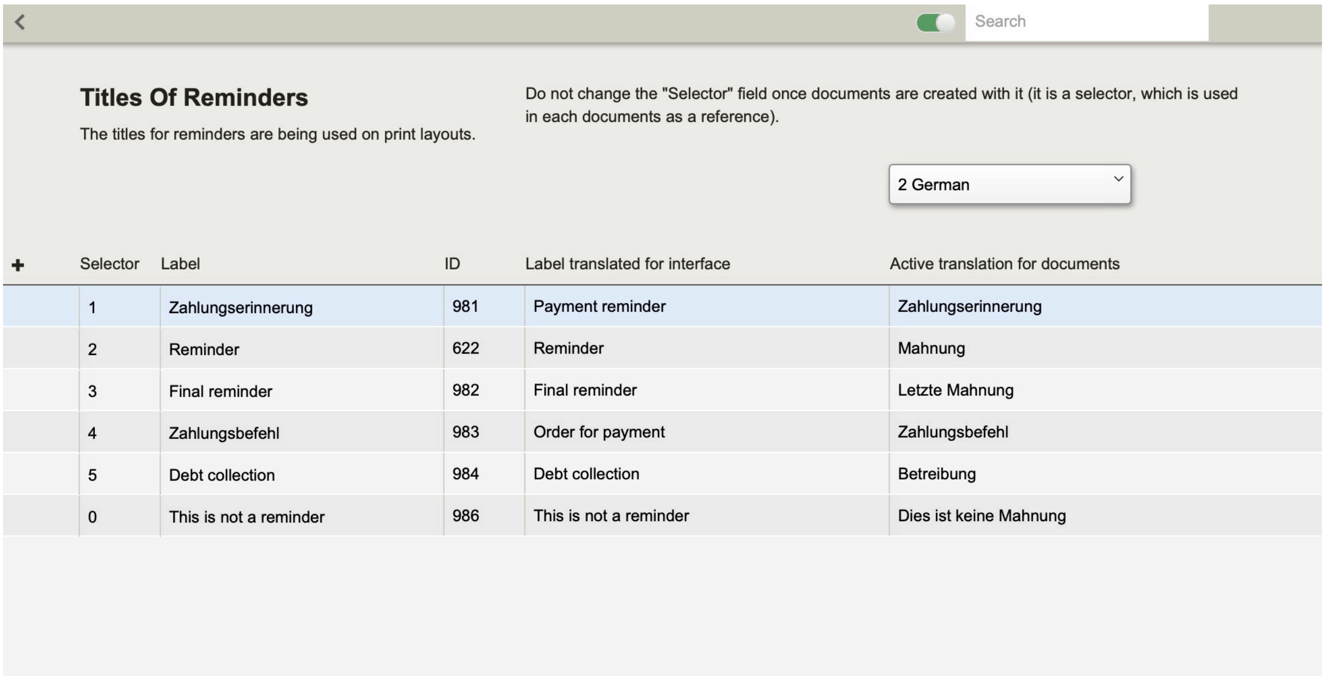
For documents, it would look slightly different:

<<**L::gD**[NUMBER]>> (with the field L::gD)

Translations are everywhere

Not only are all text labels in a single central table, but that same table has all the translations as well. From this table translations are used throughout the application and usually well accessible.

One example: The titles of Reminder texts can be found in the Developer Dashboard > Settings > Titles of Reminders. It is a simple list where texts have a unique Selector and label-ID attached. It looks like this:



Selector	Label	ID	Label translated for interface	Active translation for documents
1	Zahlungserinnerung	981	Payment reminder	Zahlungserinnerung
2	Reminder	622	Reminder	Mahnung
3	Final reminder	982	Final reminder	Letzte Mahnung
4	Zahlungsbefehl	983	Order for payment	Zahlungsbefehl
5	Debt collection	984	Debt collection	Betreibung
0	This is not a reminder	986	This is not a reminder	Dies ist keine Mahnung

Final remarks

I hope you enjoyed the information. Now go and run your business! If any questions arise, please drop me a line at support@kursiv.com. Also check out the other available materials at fmstarter.com.

Karsten Risseeuw