

# Frequently Asked Questions and “How To...”

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## General FAQ

**1. *What are the benefits of using LogicBright CRM?***

To succeed in business, you need to focus on your business objectives and your customer’s needs, not on the technology infrastructure required managing these needs and objectives. With LogicBright CRM you receive a solution that helps you manage your sales and marketing activities and opportunities in an easy-to-use environment, with no need for internal technical support, and for a reasonable monthly cost.

**2. *What are the system requirements for using LogicBright CRM?***

None. Any system that is capable of logging on to the Internet is capable of using LogicBright CRM. There are no other additional system requirements to be able to add, edit, or use the information in your CRM on our website.

**3. *What browsers are supported by LogicBright CRM?***

LogicBright CRM has been tested and used on the following browsers Firefox for the PC and Mac v.1.5 & 2.0, Internet Explorer 6 & 7 and Opera 9+. Though most features work on Safari for the Mac we do not currently offer support for this browser.

**4. *How do I sign up for a subscription?***

Just click on Product Options under the Purchase choice, enter the number of users you’ll need to license, and click on Add to Cart.

**5. *Do I need to sign any long term contracts?***

No long term contracts are required – licenses are purchased in 12 month term increments and can be set to automatically renew on the anniversary date of the original purchase.

**6. *How will I be billed?***

We accept all major credit cards: Visa, MasterCard, American Express and Discover with the option of annual automatic renewal.

## 7. Will I be charged for future upgrades?

You will never be charged extra for maintenance, upgrades, or updates to LB CRM. Since all these tasks are handled by us internally, you're assured of always having the newest, most up-to-date version of LB CRM every time you logon.

## 8. How are renewals handled?

30 days prior to your anniversary date, you will be sent an email to remind you of your upcoming LogicBright CRM renewal. There will be a link on the email to direct you to the shopping cart on our website, where you can indicate the number of licenses you'd like to register for the upcoming year. Any information you enter will become effective (and renewals will be activated) on your renewal date - unless you notify us otherwise in advance.

## 9. At what times can I use the system? What hours are available?

Your access to LogicBright CRM is available 24 hours a day, 7 days a week, and 365 days a year. So, you can plan/update/strategize anytime you have the need to.

## 10. How do I get technical support if I have a problem?

There are three ways you can get technical support for LogicBright CRM:

1. **Click** on the **Help** button on any page to open the Help index and contents. We also provide online tutorials, a downloadable User Guide as well as a "Frequently Asked Questions" and "How To" section located [here](#)
2. **E-Mail** to [support@logicbright.com](mailto:support@logicbright.com).  
Our hours of operation for *email support* are: M-F 9 am -6 pm CST. For assistance after hours please use the form located [here](#).
3. **Call** our support line available at 1•866•WWW-LOGIC (999-5644) x **372**

## 11. How secure is the data I enter?

LogicBright CRM is designed to use the 256-bit Secure Socket Layer protocol. This means that all the information exchanged, is encrypted while simultaneously going through a process of authenticating the user trying to access it- this restricts the right of entry *only* to people registered to use it.

All the data going through LogicBright CRM is stored in a highly secured server environment located in a state-of-the-art data center that, in addition to utilizing multiple advanced firewall systems, it also offers unparalleled physical security features like, multiple power supply redundancies, biometric access restrictions, intrusion detection systems and 24/7 on-site security staff .

**12. *Is my data backed up and how can I retrieve a copy of it?***

All data is backed up using industry standard methods. The data can be made available on various media (CD,DVD, etc.) upon request – for such requests please contact our product support team at

[support@logicbright.com](mailto:support@logicbright.com) or toll free by phone at 1• 866 •www-LOGIC (999-5644) x **372**

Available M-F 9am -6 pm CST

**13. *How long are my data and profiles saved between renewals?***

Per our Terms and Conditions of our service: “...*thirty (30) days after suspension of service, either through breach of contract, non-payment, or by notice of suspension by either party.*”

**14. *Will I be charged for future upgrades?***

You will *never* be charged extra for maintenance, upgrades, or updates to LogicBright CRM. Since all these tasks are handled by us internally, you’re assured of always having the newest, most up-to-date version of LogicBright CRM every time you log on.

**15. *Can I prevent any data from being deleted or changed?***

Yes. In the Admin section, you are given the ability to control the access of each user on their ability to View, Add, Edit, Delete, Import, and Export any information from the Contacts, Companies, Opportunities, ToDo, Leads, or Users fields. And any changes or adjustments you make are instantly applied as soon as you hit the SAVE button.

**16. *Do you offer custom versions of LogicBright CRM?***

Though our product was designed to fit most companies we realize that some companies need a more customized solution. Let us know what you require and we will work with you to solve your problems efficiently and effectively. Please [Contact Sales](#) for more information.

**17. *Can I import data I already have in a different system?***

LogicBright CRM is very flexible when it comes to importing your data ready to use. We currently support importing from ACT! and Outlook. We also provide free Excel templates that will allow you to select data from other sources.

**18. *Can I create custom fields to capture specific data we use in our business?***

You can add unlimited custom fields in your Leads, Accounts, Contact, ToDo, and Opportunity records. Custom fields provide you the ability to track critical information that your business needs as well as ensuring the correct data is entered.

## *19. Can using LogicBright CRM alter or corrupt the data I have in my other in-house programs?*

Since the data you enter and save in LogicBright CRM are maintained in a secured location physically and electronically removed from your in-house programs, the data in your in-house programs is not affected by using LogicBright CRM.

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## How To...

### For Administrators

#### *1. How do I add new users?*

Only users with Administrative privileges can add, edit or delete users under the Admin tab.

To add a new user, you simply go to either the **Home** or the **Admin** sections and click on *Add User*. At that point, a page will come up that allows you to enter the new user's information, and also allows you to set their User Settings and Access controls. If you still have additional users licenses available, your new user will be able to login as soon as you hit the SAVE button. If you need to add an additional license to accommodate the new user, the system will automatically direct you to the shopping cart to confirm the details of your selection.

When you add additional users you are charged a prorated amount for the remainder of the time left until your anniversary/renewal date. For example: If you sign up one new user up on February 1st, 2007 and your renewal date is March 1st, 2007, you would be charged only for one month.

#### *2. How do I delete users from the system?*

To delete an existing user, you navigate to the Admin section and select their name on the User List. Once in the user account, you select *Delete next to the User Info*" part of the page - once you click "Yes" on the confirmation dialogue the user will then be deleted.

#### *3. What is the minimum/maximum amount of users?*

With *LogicBright CRM*, as long as there is at least one registered user there is no restriction on the maximum number of users, so you can purchase the quantity that fits your company. This ensures that you only pay for exactly what you get -- no more, no less.

#### 4. *How much storage is available per user?*

Users have 100 MB available for their records, including files and contacts. All storage *is shared by all users* and for the entire length of the term of your license. We offer the option to purchase additional storage. For such requests please contact our [Sales Department](#).

#### 5. *How can I set a field as being “required” on a section?*

You first need to access the Custom Setup option in the Admin section. Once there, you can select the section in which the fields are located. Placing a check mark next to each field will make them “required” where the user will have to fill out in order for a new record to be saved. This is the same section in the LogicBright CRM solution where you can add custom fields (see below)

#### 6. *How do I add custom fields?*

First access the Custom Setup option in the Admin section. Once there, you can select the section within which the custom fields need to be added. Under the Customize Contact Fields section, you can add labels for the new field, determine the type of value to be added (Text, Date, Currency, Number or Checkbox) and set whether this will be *required* field. Clicking on the “Add New Field” option again will create another new field.

### For Users

#### 1. *How do I promote a Lead into a Contact?*

Once you have accessed the lead you want to convert, you select “*Make Contact*” on the *Lead Info* part of the page. You will be asked to confirm and also verify the First, Last name field information— once you select “Yes” than your Lead will be converted into a Contact. Your Lead record will remain intact and it will now be interlinked to your new contact—that means that if you select this record in the Contacts page, you will see all other records linked to this contact (whether an Opportunity, an Account, a Lead, a To Do, any files ,etc.)

#### 2. *How do I link a Contact to an Account?*

If you already have an existing account and want to link it to a new or existing Contact record you first need to access that Contact from the Contacts section. Once in that record you choose to **Edit** the Contact Info at the top of this screen. By starting to type the name of the account you want this record linked to in the field labeled **Account** you will see that LogicBright CRM will start to auto-populate the names of existing Accounts that match the letters you are typing. If you *don’t* see the auto-complete feature matching a record you could either:

a) Be mistyping the name of the account name

Or

b) The account might not be entered in LogicBright CRM. In this case refer to the following item in this section of the guide: “*How do I add accounts?*”

### 3. How do I add Accounts?

When creating a new Account (or any type of new record), you always have the option of linking it to any existing or new record whether that is a single or multiple: Lead, Contact, Opportunity, ToDo entry or File, that can be edited or removed at any time.

Adding a new Account into the LogicBright CRM solution can be achieved in one of two ways: you can access the “Add Account” option *either* in the **QuickLink** menu on the upper left pane of the screen, *or* by entering the Account section and selecting the same option at the top of the screen. You will then be presented with all the necessary fields to create a new record.

### 4. How do I attach / remove a file?

You can attach a file to any record whether it’s a Lead, Contact, Account, Opportunity or ToDo. All records have a section labeled “**Files**” where you can click on **Attach** and select the file you want associated with that record. The association of that attached file is transferred to anything else linked to that record.

### 5. How do I create a ToDo record?

There are a few ways to add a ToDo record. You can:

- a) Click on the Calendar (accessible from all sections) the date and time you want and create the association you need (i.e.: Assigned To, Company, Primary Contact ) ,
- b) You can select on “Add ToDo” from the QuickLinks pane (accessible from all sections), or
- c) Add a “ToDo” item from within any of the sections directly (Leads, Contacts, Accounts, Opportunities)

### 6. How do I submit a suggestion?

We have provided a field labeled “**Suggestions**” located below the Calendar – this is accessible from all sections of the LogicBright CRM and is to be used as a means of direct access to our Research and Development Team.

We rely heavily on your feedback when we develop updates and upgrades to our solution so *please feel free to participate*. You can also email us at [support@logicbright.com](mailto:support@logicbright.com).