

AppShore

Administrator Guide

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Overview

As the AppShore Administrator, you may:

- Upgrade your account from a free trial to a paid subscription
- Close your AppShore account
- Increase or decrease the number of Users licensed
- View and Edit your company profile
- View your usage statistics including disk space used, number of records in the system, and data base size
- View the history of orders placed including increases and decreases in users licensed
- View your invoices on a month by month historical basis
- Create an organization chart of your company or department
- Define your sales organization and assign quotas to sales people
- Create new Users and delete Users
- Activate and deactivate Users
- Grant Roles to Users
- Reset User passwords
- Create Roles and Grant permissions to Roles
- Activate and deactivate Roles
- Activate and deactivate applications
- Change the labels on the application tabs
- Determine the sequence of the application tabs across the top of the page
- Replace the AppShore logo with your own
- Create Templates for Web mail and Campaigns
- Customize drop down lists
- Customize fields and forms
- Assign records to Users

Each of these functions will be discussed in this document.

Logging into AppShore

This document assumes that you have an active AppShore account and you are the Administrator.

To access your AppShore account you must have valid login credentials. As a minimum you must have an AppShore user name and password. Complete login credentials also include your company alias. Your company alias is the prefix to the name of the dedicated appshore.net domain that was created for your company.

If you have forgotten which company alias you selected, please review the confirmation email that was sent to you from AppShore at the time you registered or contact AppShore support at support@appshore.com.

If you have valid credentials to access your AppShore account:

From the browser navigation bar, type your dedicated appshore.net account domain name and click Go or press the Return/Enter key on your keyboard. Your AppShore account domain name will be in the form of; <http://mycompanyalias.appshore.net>, where *mycompanyalias* is the company alias you selected when you registered. At the AppShore login page, enter your user name or email address, and your password. Click the Login button or press the Return/Enter key on your key board.

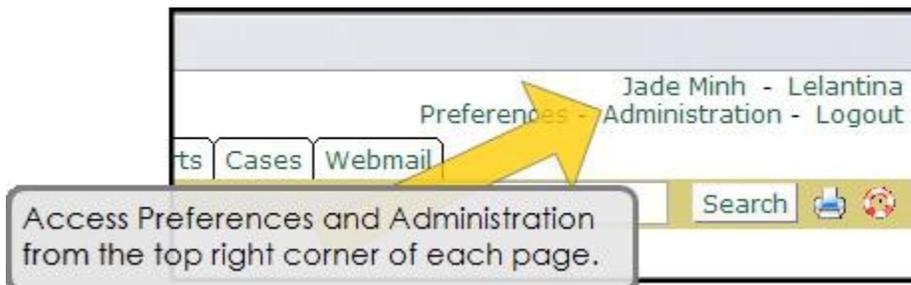


Alternatively, you can access your account from the AppShore web site, www.appshore.com. Click on the red Customer Login tab at the top right of any page on the AppShore web site, enter your company alias, your user name or email address, and your password. Click the Login button or press the Return/Enter key on your key board.

If you have forgotten your password, click on the "Forgot your password?" link on the login page and request a new one to be automatically sent to you via email.

If you are still not able to login, please contact AppShore support at support@appshore.com to validate or reset your login credentials.

In the top right corner of every AppShore screen you will find the link to access the Administrative environment.



How to upgrade a subscription

AppShore uses the PayPal or Google Checkout payment processing services for subscription billing. Subscriptions are not automatically renewed and therefore should be renewed at the end of the selected period.

The process is similar when you upgrade (or downgrade) from a trial to a paid subscription or from a paid subscription to another one.

1. From Administration>Company>Upgrade AppShore.
2. Select the Edition (number of users) you want to license.

3. Enter the period (1 to 12 months) you want to license. Enter 0 if you wish only to upgrade without extending the period.

4. You will then check the order by clicking the button "Update the basket". If the order information is correct, click on the button labeled "PayPal" or "Google Checkout" according your preferred payment system.

5. You will be automatically redirected to the PayPal or Google web site. If you already have a Paypal or a Google account; sign in and continue. If you do not have an account you will be guided through the simple process to set one up. Then you can continue through the check out process.

7. Review the summary of the AppShore order presented, and click 'Pay'.

8. Once you received the PayPal/Google confirmation message 'You have Successfully Signed Up', click on the button at the bottom right side of the page labeled 'Return to AppShore'. This is the final step of the check out process. When you are returned to your AppShore environment, look for the message: 'You have successfully subscribed or modified your subscription to AppShore.'

If you do not click on the 'Return to AppShore' button you will terminate the process early and your AppShore account will not be fully activated.

Subscription payments will be automatically deducted from the payment source tied to your PayPal or Google account.

How to close your AppShore account

To terminate your AppShore account, login to your AppShore account and close it or send an email to support@appshore.com requesting termination.

The termination will be effective immediately and the account will be deleted shortly after. Once the account is deleted, it is still possible to recover it up to 30 day. Recovery of an account is a complex and lengthy manual operation that will be invoiced.

It is advised to export your data before requesting termination of your account.

Roles

A User must have the Administration Role to access the Roles link.

If you are in a multi-user environment, one of the first things you will probably want to do is create new users and enable them to access the AppShore service. Each User must be assigned a Role. Therefore, in a multi-user environment, you should begin by creating Roles, not Users. If you are the only user of the AppShore service you do not need to create Roles and can skip ahead.

You may not delete the Administration Role or modify its permissions.

A Role can be thought of as a security profile. A Role can be granted to an individual User or to multiple Users. By granting a single Role to multiple Users you ensure that each person granted the Role will have the exact same security profile as all other Users assigned that same Role. A User may be granted more than one Role. Using Roles to manage access is an easier and more efficient way to manage security compared to assigning permissions to every user on an individual basis.

Roles secure access to applications and records within applications. Each application can be secured individually within a Role. You may choose not to grant permissions to some applications for some Roles. Users will only see the application tabs at the top of the page that you have granted them permission to access. If you do not grant permissions to particular applications in a Role, the Users who are assigned that Role will not see the application tabs at the top of the page which have no permissions set.

Each record in the AppShore system has an Owner. An Owner is a User. Not all Users must own records, but each record must have an Owner. For example, the President of the company may be a User and not own any records, but may be able see all records owned by all other Users.

The Owner of a record is determined by assignment. By default, newly created records are assigned to the currently logged in User at the time the record is saved. Given the appropriate Role and permissions to do so, a User may assign a record to another User at the time of creation, or after it is created, and may assign records in bulk or individually after they are created.

Using Roles you may limit the records accessible to Users within an application. You may want to allow some Users to see all the records within an application, while others are only allowed to see their own records, or only those records owned by themselves and their teammates. For example, the sales manager may be allowed to view and edit all records owned by all sales people while some sales people can only see and edit their own records, and other sales people can see and edit only those records owned by themselves and other members of their sales team.

To facilitate this level of access control granularity, applications may be secured at multiple levels:

- User
- Role
- Public
- Administration
- Some combination of the above

You can create Roles that have permissions for all applications set at only one of the User, or Role, or Public level. Or, you can create Roles that have varying levels of permissions at the User, Role, and Public levels for each application.

Note: When granting permissions to Reports and Documents, it is best to provide at least Read only Public level permissions. By doing so you ensure that users can run all reports and view all documents that are created or stored in the system.

How to Create a New Role

A User must have the Administration Role to create a new Role. To create a new Role:

- Click on Administration link in the top right corner of the page
- Click on Roles
- Click on New Role
- Give the Role a name that is descriptive of the group or individual who will be granted the Role, such as Sales Representative, or Sales Manager, or President.
- Be sure the field labeled 'Status' reads Activated
- (optional) Give the Role a Label, something that further describes its purpose.
- Click Save

Grant Permissions

A User must have the Administration Role to access the Grant permissions link under Roles.

You cannot modify the permissions granted to the Administration Role.

To grant permissions to a Role:

- Click on Grant Permissions under Roles
- Select a Role from the drop down menu
- Grant permissions to applications by clicking the appropriate Read and Write check boxes in the row of the application and in each of the columns titled "User", "Role", and "Public".
- If no permissions are granted to an application at any level (User, Role or Public) the application tab will not be visible to the User.

User level permissions

For each application granted User level permissions Users can view (Read only), or view and edit (Read and Write) only those records within the application which have been created by or assigned to them.

Granting Read only permissions to an application at the User level will allow Users who are granted the Role to be able to view only those records assigned to them. They will not be able to create new records nor edit records assigned to them. They

will not be able to view or edit records of that application that are assigned to other Users.

Granting Read and Write permissions to an application at the User level will allow Users who are granted the Role to be able to view and edit only those records created by or assigned to them. They will not be able to view or edit records of that application that were created by or assigned to other Users.

Role level permissions

For each application granted Role level permissions Users can view (Read only), or view and edit (Read and Write) all records within the application that were created by or assigned to them and those records created by or assigned to other Users who have been granted the same Role.

Role level access control should be used when you want a team or group of Users to share access to records amongst themselves. For example, you may create a Role called Western Sales Team and another called Eastern Sales Team, each with Read/Write permissions set for applications at the Role level but none at the Public or Administrative level. You could then grant these Roles to the respective members of each sales team. Those Users who have been granted the Western Sales Team Role will be able to view and edit all records that are assigned to or created by anyone else granted the Role Western Sales Team. They will also be able to assign records to each other. Members of the Western sales team will not be able to assign records to members of the Eastern sale team nor will they be able to see or edit the Eastern sales team's records. The same rules would apply conversely for the Eastern team.

Granting Role level permissions to an application, whether Read only or Read and Write, also automatically grants the same permissions, either Read only or Read and Write, at the User level.

Granting Read only permissions to an application at both the User and Role levels will allow Users granted that Role to view their own records and records owned by other Users who have also been granted the Role. It would prevent Users granted the Role from being able to create, edit, or assign records within that application.

Granting Read and Write permissions to an application at the Role level will allow Users who are granted the Role to be able to view, edit, and assign their own records and to view, edit and assign those records owned by other Users who have also been granted the Role.

Public level permissions

For each application granted Public level permissions Users can view (Read only), or view and edit (Read and Write) all records within the application.

If you want some Users to be able to see and edit all records within an application, irrespective of the Owner, create a Role that has Read and Write permissions at the Public, Role and User levels.

If you want some Users to be able to see but not edit all records of an application irrespective of the Owner, create a Role with Read only permissions at the Public, Role and User levels. Users granted this Role will be allowed to view all records in the

application irrespective of the Owner but they will not be able to create, edit or assign any records in the application including those assigned to them (they will not be able to edit their own records).

Granting Read only permissions to an application at the Public level and Read and Write permissions at the Role and User levels will allow the User granted that Role to view all records in the application irrespective of the Owner, and to view, edit and assign all records assigned to other Users who have also been granted that Role, and to view and edit and assign their own records.

Granting Read only permissions to an application at the Public level and Role levels, and Read and Write permission at the User level will allow the User granted that Role to view all records in the application irrespective of the Owner, to view but not edit records assigned to other Users who have also been granted that Role, and to view, and edit and assign their own records.

By definition, granting Public level permissions to an application, whether Read only or Read and Write, also automatically grants the same permissions, either Read only or Read and Write, at the Role and User levels.

A Role with Public level permissions is useful if you want certain users to have full access to all records in either Read only or Read and Write mode, but you do not want them to have any Administrative rights. For example, you may grant a Role with Read only Public level permissions on all applications to the executives of the company to provide them with full visibility into all the activity on the system, but not allow them to edit any of the records.

Limited Administrative permissions

You may have more than one person assigned the default Role of Administration, but this practice is not recommended. Among other things, the Administrator has the ability to modify the AppShore subscription, create new Users, and create and modify Roles. For fiscal and security reasons, these are rights that should be limited to one individual in most cases.

You can however create Roles with varying levels of administrative permissions without providing full Administrator rights. To do so, grant permissions on the Administration application found in the list of applications in the security profile matrix.

Granting a Role to a User that has Administration level permissions to the Administration application has the exact same effect as granting the Administration Role. The User will have full administrative rights including, among other things, the abilities to modify the AppShore subscription, create new Users and new Roles, and customize the environment.

Granting a Role Read only permissions to the Administration application at the User level, or at both the User and Role level, or at the User, Role and Public levels enables Users with that Role to view but not edit the Company profile record, view but not add or change Departments, and to view but not edit their own and other User's profile records.

Granting Read and Write permissions to a Role on the Administration application at the User level enables Users with that Role to view but not edit the Company profile record, view but not add or change Departments, and to view and edit their own profile record. They will be able to view but not edit other User's profile records.

Granting Read and Write permissions to the Administration application at both the User and Role levels enables Users with that Role to view and edit, their own profile record, and to view and edit the profile records of other Users granted the same Role. It allows the User to view but not edit the Company profile record and Department records.

Granting Read and Write permissions to the Administration application at both the User and Role levels and Read only permissions at the Public level enables Users with that Role to view and edit, their own profile record, and to view and edit the profile records of other Users granted the same Role, and to view but not edit all other User's profiles. It allows the User to view but not edit the Company profile record and Department records.

Granting Read and Write permissions to the Administration application at the Public, Role and User levels enables Users with that Role to view and edit their own profile record all other User's profile records. It also allows the User to view and edit the Company profile record and Department records.

List Roles

A User must have the Administration Role to access the List Roles link. The List link under Roles displays the list of all Roles created. From here the Administrator can sort the Roles by name or status, search for roles by name and status, view, edit, activate, deactivate, and delete Roles.

Never delete or modify the Administration Role.

The default sort sequence of the list of Roles is ascending alphabetic order. To sort the list of Roles by descending alphabetic order click on the column header labeled 'Role Name'. Click on it again to return to ascending alphabetic sequence.

To sort the list of Roles by status click on the column header labeled 'Status'. Click on the column header again to reverse the sort sequence.

To sort the list of Roles by the Label click on the column header labeled 'Role Label'. Click on the column header again to reverse the sort sequence.

To sort the list of Roles by date created click on the column header labeled 'Created'. Click on the column header again to reverse the sort sequence.

To sort the list of Roles by date last updated click on the column header labeled 'Updated'. Click on the column header again to reverse the sort sequence.

To search for a specific Role, enter all or part of the name of the Role in the search box labeled 'Role Name' and click the 'Search' button. To search for a Role based on the content of the Label enter all or part of the Label in the search box labeled 'Role Label' and click the 'Search' button. To search for a Role by status select the Status (Activated or Deactivated) from the drop down menu labeled 'Status' and click the

'Search' button. You can search for Roles by name and by label and by status by using all these search criteria simultaneously. Click the Clear button to remove all search criteria and see the entire list of Roles.

To delete a Role from the list click on the check box next to it and then click the Delete button at the bottom of the list. You can delete multiple Roles simultaneously by clicking on the check box next to each one and then clicking the Delete button.

You may not delete the Administration Role.

To view a specific Role from the list, click on either the name of the Role or the magnifying glass icon next to it. When viewing a Role you are able to see its Name, its Status, its Label, the date it was created and the date it was last updated. You can enter edit mode to modify the Role by clicking on the Edit button. You can duplicate the Role by clicking on the Duplicate button. Clicking Duplicate brings you into edit mode where you can create a new Role. The benefit of the duplicate button is that the definition is carried over to the new Role and the Status is automatically set to the same status of the Role being duplicated. You can also delete the role from view mode by clicking on the Delete button.

Edit/Activate/Deactivate Roles

A User must have the Administration Role to access the Activate Roles link.

To edit a Role, click on the green pen icon next to it. You are able to change the Name of the Role, the Status, and the Label. Click Save after modifying the Role.

You may not edit or deactivate the Administration Role.

As your organization and security requirements change, you may want to deactivate some Roles that are no longer appropriate or necessary. Deactivating a Role is not the same as deleting a Role. You may activate a role again later if/when it is needed.

You may deactivate Roles individually by editing the Role and changing the value of the Status field as described above. You can also change the Status of Roles in bulk. To change the Status of multiple Roles simultaneously, from the List Roles page, click the check box next to each of the Roles you want to Activate or Deactivate. Then, at the bottom of the page in the bulk operations area, choose 'Selected lines' from the 'Apply on' drop down menu, then select either Activate or Deactivate from the 'Status' drop down menu at the bottom of the page, then click Save. You can also change the Status of all the Roles on a given page (except the Administration Role) by choosing 'Current page' from the 'Apply on' in the bulk operations area, then selecting either Activate or Deactivate from the 'Status' drop down menu at the bottom of the page, and then clicking Save.

When a Role is Deactivated all Users who have been granted that Role will have their access rights revoked. They will be able to login but they will not have access to any application or any function except the Logout link.

Users

A User must have the Administration Role to access the Users link.

List Users

A User must have the Administration Role to access the List link under Users. The List link under Users displays the list of all Users created, their user name, first and last name, department, phone number, mobile phone number, email address and status. From here the Administrator can sort the Users by any of the above criteria and search for Users based on User name, last name, manager, or title.

The default sort sequence of the list of Users is ascending alphabetic order. To sort the list of Users by descending alphabetic order click on the column header labeled 'Name'. Click on it again to return to ascending alphabetic sequence.

To sort the list of Users by User name, first name, last name, department, phone number, mobile phone number, email address or status, click on the corresponding column header above the list of records. Click on the column header again to reverse the sort sequence.

To search for a specific User, enter all or part of the User name, and/or first or last name, and/or department in the search boxes at the top of the page then click the Search button. To search for a User by status select the appropriate value from the 'Status' drop down menu and click the Search button. You can search for Users by multiple criteria by using any combination of the search fields and drop down menus at the top of the page. Click the Clear button to remove all search criteria and see the entire list of Users.

Deleting Users

To delete a User, click on the check box next to the User's record and then click the Delete button at the bottom of the list. You can delete multiple Users simultaneously by clicking on the check boxes next to each User record you want to delete and then choosing 'Selected lines' from the 'Apply on' drop down menu at the bottom of the page and clicking Delete button. You can delete all users simultaneously by choosing 'All results' from the 'Apply on' drop down menu at the bottom of the page and then clicking the Delete button.

When a User is deleted, the records assigned to that user are not deleted. The records that were assigned to that User will remain in the system but they will be unassigned, that is, they will not be assigned to any User. You will no longer be able to search records by the User name (Owner) of the deleted User.

Viewing User Profiles

To view a specific User profile, click on either the User name, first name, or last name of the User's record from the list, or click on the magnifying glass icon next to the User's record. You can enter edit mode to modify the user's profile by clicking on the Edit button. You can also delete the User from view mode by clicking on the Delete button.

You can create a new User from view mode of an existing User profile by clicking on the Duplicate button. Clicking Duplicate brings you to the New User form. Except for the User name, email address and Initial role fields, the New User form will be

populated with all the same information of the User's profile you were viewing when you clicked Duplicate. Fill in the rest of the required information, modify any existing information that is different for the new User, and click Save to create the new User record.

Editing User Profiles

To edit a User profile, click on the green pen icon next to the User's record. Or, from View mode of the User profile, click the Edit button. Click Save after modifying the User profile.

How to Create a New User

A User must have the Administration Role to access the New User link under Users.

If you attempt to create a new User and get the message 'Users quota limit reached' it means that you have a paid subscription but have already created the maximum number of Users allowed under your license. You must either delete an existing User or modify your subscription by adding more User licenses. See the section above titled 'How to add or remove Users from a paid subscription' for information on how to increase the number of Users licensed.

There are six required fields when creating a new User; User name, first name, last name, email address, status and initial Role. You may not have more than one User with the same User name and you may not have more than one User with the same email address.

Since you must grant a Role to the User at the time the User profile is created, it is best to first create your Roles before creating new Users. See the section above titled 'Roles' for information on how to create Roles.

When a new User is created an email message can automatically be sent to the email address in their profile that will include a link to the AppShore login page and a randomly generated password. To have a "welcome email" to a new User, check the box labeled 'Send welcome' at the bottom left side of the New User form before clicking Save to create the User's profile record. The Administrator will not be copied on the email message sent to the new User and will therefore have no record of what password was generated by the system for a given User. If the User forgets or loses their password, you will not be able to tell them what it was. If you want to maintain a list of all the User's passwords as the Users are being created, here's how to do it:

Maintaining User passwords

To maintain a list of all the User's passwords, as the Users are being created, instead of entering the User's true email address in the email address field of the New User profile, use one to which you have access. It cannot be the same as the email address in your User profile. You may not have two Users with the same email address in the AppShore system.

When you Save the User's profile the new password will be sent to the email address you entered into the New User's profile. Retrieve the password and make a record of it. Keep it in a secure location to avoid a breach of security.

Then go back to the User's profile and change their email address back to their true email address. Be sure to click Save after you change the email address.

You will then need to inform the User of the new password. They will not know what password was generated for them.

Optionally, once you have the new password in your possession, you could login as the User and change the password to something easy to remember. This may help avoid future requests for new passwords. To do so:

Log out of your Administrative account.

Now login to the User's account using the password you retrieved from your email account and their User name (rather than their email address). By using the User name rather than the email address you will be able to change the User's password either before or after you go back to replace the User's true email address in their profile.

Go to Preferences>Change password.

Enter the current AppShore generated password in the field labeled 'Old Password'.

Enter the new (easy to remember) password in the New password field, and again in the Confirm new password field.

Click Save.

Make a record of the password you selected for the User. Keep it in a secure location to avoid a breach of security.

You will then need to inform the User of the new password. They will not know what password you chose for them.

Reset Passwords

A User must have the Administration Role to reset User passwords.

To reset a single User's password, from the Users>List main page, open the User's profile in edit mode by clicking on the green pen icon next to their record. Toward the bottom left corner of the profile, check the Reset password check box, then click Save.

To reset one or more User's passwords using the bulk operations, from the Users>List main page, select the User(s) from the list for whom you want to reset the password by clicking the check box next to their user profile summary record. Then, at the bottom of the page in the bulk operations area, choose 'Selected lines' from the 'Apply on' drop down menu then click Save. You can reset passwords for all Users on a particular page or for all Users by choosing either 'Current page' or 'All results' from the 'Apply on' drop down menu and then clicking Save.

When Users' passwords are reset the password is automatically sent directly to the User by email, the Administrator is not copied on the message. Therefore you will

have no record of what password was generated by the system for a given User. If the User forgets or loses their password you will not be able to tell them what it was.

If you want to receive the new password(s) yourself and then forward them to the User(s) later, you can do so by temporarily changing the User(s) email address in their User profile to one to which you have access, and then reset the password(s).

If you need/want to reset a user's password and retrieve it yourself before forwarding it to the User:

Go to Administration>Users>List. Open the User's profile in edit mode by clicking on the green pen icon. Change the User's email address in their profile to an email address to which you have access. It cannot be the same as the email address in your User profile. You may not have two Users with the same email address in the AppShore system. Then check the box at the bottom of the page labeled 'Reset password'.

Click Save to update the User's profile.

The new password will be sent to the email address you used when you modified the User's profile. Retrieve the password and make a record of it. Keep it in a secure location to avoid a breach of security.

Go back to the User's profile and change their email address back to their true email address. Be sure to click Save after you change the email address.

You will then need to inform the User of the new password. They will not know the password has been reset or what password was generated for them.

Optionally, once you have the new password in your possession, you could login as the User and change the password to something easy to remember. This may help avoid future requests for new passwords. To do so:

Log out of your Administrative account.

Now login to the User's account using the password you retrieved from your email account and their User name (rather than their email address). By using the User name rather than the email address you will be able to change the User's password either before or after you go back to replace the User's true email address in their profile.

Go to Preferences>Change password.

Enter the current AppShore generated password in the field labeled 'Old Password'.

Enter the new (easy to remember) password in the New password field, and again in the Confirm new password field.

Click Save.

Make a record of the password you selected for the User. Keep it in a secure location to avoid a breach of security.

You will then need to inform the User of the new password. They will not know what password you chose for them.

Activate/Deactivate Users

A User must have the Administration Role to activate and deactivate Users.

Sometimes it is necessary to deactivate Users to prevent them from gaining access to the system. When a User is deactivated, they will no longer be able to login. There is no other effect of deactivating a User. The User's records are not affected in any way. If/when you activate that User again, they will have all the same records and permissions as before (barring any changes made by other Users in the meantime or changes made by the Administrator to the Role they were granted).

Deactivating a User is not the same as deleting a User. Deactivating Users does not increment the number of Users allowed to be created under your license. That is, if you have already created the maximum number of Users allowed under your license, deactivating Users will not give you the ability to create new Users. If you have reached the maximum number of Users you can create under your license, the only ways to create new users is to modify your subscription (add more Users) or to delete existing Users and replace them with new ones.

Likewise, deactivating Users does not decrement your User license. Neither PayPal, the subscription payment processing service used by AppShore, nor AppShore will be notified when you deactivate a user. That is, deactivating a User does not modify your subscription by reducing the amount of money deducted from your PayPal funding source on a monthly or annual basis. If you want to modify your subscription by removing one or more Users please see the section above titled 'How to add or remove user from a paid subscription'.

You can activate or deactivate an individual User by opening the User's profile in edit mode by clicking on the green pen icon next to their User profile summary record on the Users>List main page. Once the record is open in edit mode, change the value of the 'Status' drop down menu and click Save. You can activate or deactivate a group of Users simultaneously by using the bulk operations area at the bottom of the Users>List main page. To change the status of one or more Users using the bulk operations, select the User(s) who you want to activate or deactivate by checking the box next to their User profile summary record. Then at the bottom of the page choose 'Selected lines' from the 'Apply on' drop down menu, then click Save. You can simultaneously activate or deactivate all Users on a particular page or all Users in the system by choosing either 'Current page' or 'All results' from the 'Apply on' drop down menu and then clicking Save.

When deactivating Users, be careful you do not deactivate yourself. If you deactivate the User with the Administration Role you will need to contact AppShore to have us correct the problem. You must have at least one activated User granted the Administration Role.

If you are removing Users from your subscription, it is best to deactivate the Users who will no longer need access prior to modifying your subscription through PayPal. When Users are removed from your subscription existing Users beginning with the mostly recently created are automatically deactivated until the number of Activated Users is equal to the number of Users licensed. If these are not the Users you want

to remove from the subscription you can re-activate them under Administration>Users>Activate Users after the subscription has been modified. If you deactivate the Users you want to remove prior to modifying the subscription you will avoid the potential denial of access for Users you do not want to be removed.

Grant Roles

A User must have the Administration Role to access the Grant Roles link under Users.

You can grant or revoke one or more Roles to/from individual Users or a group of Users by using the single arrow and double arrow buttons to move Users back and forth between the columns labeled 'Roles' and 'Roles Granted', and then clicking Save.

To grant one or more Roles to a User, select the User from the drop down menu at the top of the page. Then select the Role(s) you want to grant the User from the left column labeled 'Role's by clicking on the Role(s) name. Then click on the single right arrow to move the Role(s) to the column on the right labeled 'Granted Roles'. Then click Save.

To revoke one or more Roles from a User, select the User from the drop down menu at the top of the page. Then select the Role(s) you want to revoke from the User from the right column labeled 'Granted Roles' by clicking on the Role(s) name. Then click on the single left arrow to move the Role(s) to the column on the left labeled 'Roles'. Then click Save.

Company

Information

This is where your company profile is maintained. The information in the company profile is captured at the time you register for the 30 day free trial or complete the registration form during the subscription process. You can edit this information at any time by clicking on the Edit button.

The company profile is also where you indicate the start of your fiscal year. This piece of information is only relevant if you are utilizing the AppShore Forecasts application. For a detailed explanation of this subject please see the section below titled Sales Organization.

Usage Statistics

This is where you can view information regarding your AppShore account including:

- The AppShore Edition you have licensed
- The due date of your trial if you have not yet subscribed
- The license check (last time you logged in)
- The date your trial or subscription was registered
- The date of the last auto update (when AppShore last updated your Edition)
- The list of applications available under your license
- The number of Users you have licensed (Users quota)
- The number of Users created
- The number of Users activated
- Your disk space quota
- Your disk space used (in bytes and as a percentage of the quota)
- Your data base records quota
- The number of data base records created
- The percentage of your data base records quota consumed
- The number and total size of the documents stored for your account

You cannot edit the information on this page, you may only view it.

Departments

This is where you can define the departmental organization of your company. This area is used for your internal purposes only and is helpful, particularly in large companies with multiple departments, for identifying which individuals within which departments are using the AppShore service and who the managers and assistants are in each department. It is an easy way of creating a simple organizational chart of your company including the reporting hierarchies.

List

This is where you can view and edit the list of Departments and the departmental hierarchy you have defined for your company. You can also view the managers of the departments, the assistants of the managers, and view the number of individuals within each department who are Users of the AppShore system.

To edit a departmental profile click on the green pen icon next the department name.

To view a departmental profile click on the magnifying glass icon next to the department name. You can enter edit mode and modify the departmental profile by clicking on the Edit button.

To view a Manager's or an Assistant's User profile, click on the name of the User. You can enter edit mode and modify a User's profile by clicking on the Edit button.

New Department

This is where you can create Department profiles. At a minimum, you must give the Department a name. Once created, the Department will appear in the list of Departments and in the Org Chart. To create a departmental hierarchy, click on the magnifying glass icon next the field labeled 'Main Department' and select the Main Department from the list of previously created Departments. The main department is the Department to which another is a subordinate. For example, a regional, or divisional office would be subordinate to the main corporate headquarters.

Org Chart

This is where you can view the departmental and organization hierarchies you have defined for your company.

Sales Organization

This is where you can identify specific Users of the AppShore system as being members of the Sales Organization.

Sales People

This is where you can identify specific Users of the AppShore system as being sales people. The purpose of doing so is to enable the ability to assign quotas to sales people and the ability to view, search and sort the sales forecast by individual sales person from within the AppShore Forecasts application.

To identify one or more Users as sales people, select the User(s) from the list on the left labeled 'Users' by clicking on the User(s) name, then click the single right arrow to move the User(s) to the column on the right labeled 'Sales people'. Then click Save.

To remove one or more Users from the list of sales people, select the User(s) from the list on the right labeled 'Sales people' by clicking on the User(s) name, then click the single left arrow to move the User(s) to the column on the left labeled 'Users'. Then click Save.

When Users are added to the list of sales people, their User name will appear in the drop down menu of the Forecast application labeled 'Sales people'. You will then be able to view all sales opportunities (records created under the AppShore Opportunities application) by Sales person. You will also be able to filter the list of sales Opportunities in the Forecasts application by the sales person who owns the Opportunity and see grand totals for the Expected amount and the Forecasted amount of all Opportunities owned by that sales person.

Once sales people have been identified, you may then assign them Quotas (see the section below titled Quotas). When quotas have been assigned to sales people the Forecasts application will automatically calculate the sales person's performance against their assigned quota. The calculation is based on the total dollar amount of all deals won during a user specified time frame (those with a percentage of 100% in the Opportunities application) as compared to the quota assigned for the time frame (Month, Quarter, Year, or a custom date range).

It is not mandatory to assign quotas to sales people. If sales people have been identified, but no quotas have been assigned to sales people you will still be able to filter the sales pipeline by sales person with the Forecasts application. But, you will not be able to measure individual sales peoples' performance against an assigned quota.

If no Users have been identified as sales people, the Forecast application will still calculate grand totals for the entire sales pipeline, but it will not be possible to filter the sales pipeline based on sales person, calculate grand totals for business won by sales person, nor to measure individual sales peoples' performance against an assigned quota.

Sales Teams

This is where you can identify specific Users of the AppShore system as being members of a sales team. The purpose of doing so is purely for your convenience in visualizing the sales organization.

To create a new Sales Team, click on the New button. Give the Sales Team a name and, optionally, you can define the Main sales team, which is a form of hierarchical definition. For example, the Eastern Region Sales Team may be defined as the Main Sales Team of the New York Sales Team. In other words, the New York Sales team is subordinate to the Eastern Region Sales Team. Optionally, you can also define the Manager of the Sales Team by selecting the appropriate User from the drop down menu labeled 'Manager'. The 'Manager' drop down menu is populated with the names of the Users who were previously identified as being Sales People as described above.

When you have finished defining your Sales Team, click Save. Repeat the process as necessary for your entire sales organization. Sales Teams defined here will automatically appear under the Team Members link where you can visualize each team and all its members.

To delete a Sales Team, from the main Sales Teams page, click the check box next to the Sales Team to be deleted and then click the Delete button.

Team Members

Here is where you identify the members of the Sales Teams you have created as described in the section above. To identify Users as being members of a Sales Team, first select the specific Sales Team from the drop down menu at the top of the page. Once the Sales Team has been selected, assign the individual Users to the Sales Team by clicking on their User name and then the right arrow button to move them to the column on the right labeled 'Team members'. Once you have assigned the appropriate Users to the Sales Team, click Save.

You can remove Users from a Sales Team by reversing the process above.

Quotas

You can only assign Quotas to those Users who have been identified as sales people as described above. The purpose of assigning quotas to sales people is to allow for performance against quota to be tracked in the Forecasts application.

To assign Quotas, select the sales person from the drop down menu labeled 'Sales people'. Then select the fiscal year from the drop down menu labeled 'Fiscal year'.

Fill in the dollar amount of the quota for each month of the fiscal year and click Save.

The Forecast application will automatically calculate the performance against quota (based on Opportunities Won) of the individual sales person for all sales people who have been assigned a quota.

Note: To set the beginning month of the fiscal year go to Company>Information, click Edit and select the month from the drop down menu labeled 'Start of fiscal year'.

Applications

List

This is where you can rename the application tabs, view the sequence of the tabs across the top of the page (Rank), see whether or not an application is customizable, activate and deactivate applications one by one or in bulk, determine whether the application is visible or invisible (whether the tab appears to the User or not) one by one or in bulk, and whether the application is searchable or not (included in the applications searched using the Global search feature) one by one or in bulk.

From the main page you can Activate or Deactivate, determine whether an application is Visible or Invisible, and whether it is Searchable or not Searchable either application by application or for multiple applications simultaneously by using the bulk operations area at the bottom of the page. To Activate, Deactivate, set as Visible or Invisible, or to set as Searchable or not Searchable one or more applications at a time, check the box next to it, then go to the bottom of the page and choose the parameter(s) you want to modify for each application, then choose 'Selected lines' from the 'Apply on' drop down menu and then click Save. To change any or all of the above parameters for all applications on the page or for all applications in the list at once, choose either 'Current page' or 'All results' from the 'Apply on' drop down menu after setting the parameters appropriately, and then click Save.

To change the name that appears on the tab of an application click the green pen icon next to its name or open the application in view mode by clicking on its name, then click Edit. Change the text in the field titled 'Label' to change the application name as it appears on the tab, then click Save. For example, if you want to rename Accounts to Clients, enter the word Clients in place of the word Accounts in the Label field.

From here you can also Activate or Deactivate, determine whether it is Visible or Invisible, and whether it is Searchable or not Searchable. To Activate or Deactivate the application select the appropriate value from the drop down menu labeled 'Status'. To set the application to be either visible or invisible check or un-check the check box labeled 'Visible'. To set the application to be either searchable or not searchable check or un-check the check box labeled 'Searchable'. Be sure to click Save after you have made your edits to the application.

When an application has been Activated but is also Invisible, the application will still function where appropriate but the tab will not be visible to any user. For example, if the Web mail application were Activated and Invisible, Users will be able to use the Campaigns application and send email messages by clicking on an email address within a record or by using the Add button from the related records grid. But they will not be able to see the Web mail tab. From the Web mail tab one could send a message, view the contents of folders and set up Signatures, if it were Visible.

When an application has been Deactivated, or has been set to Invisible, the tab for the application will not be visible to any User, irrespective of whether or not permissions have been granted to the application in the Role assigned to the User.

Activate - Rank Applications

Here you can determine the sequence of the tabs across the top of the page and Activate or Deactivate applications in groups or individually.

By default all applications are activated when a new AppShore account is opened. To Deactivate an application select it from the list of applications in the list labeled 'Activated applications' by clicking on its name, then click the right arrow to move it to the column on the right labeled 'Deactivated applications'. To activate an application reverse the process.

You can Activate or Deactivate all applications simultaneously by using the double arrow buttons.

When an application has been deactivated, the tab for the application will not be visible to any User, irrespective of whether or not permissions have been granted to the application in the Role assigned to the User

You can determine the sequence of the application tabs across the top of the page by selecting the application by clicking on its name and then using the Top, Up, Down and Bottom buttons to re-sequence the list.

Note: If the Web mail application is deactivated it has the side effect of rendering the Campaigns application virtually useless. Typically a session time out will be forced when attempting to modify or use any aspect of the Campaigns application.

Customization

Company logo



The AppShore logo appears in the top left corner of each page. You can replace the AppShore logo with your company logo. To do so, go to Administration, then Customization, then Company logo.

Valid logo image formats are .gif, .jpeg, .jpg, and .png. The recommended size of the logo image is no more than 160 pixels in width and no more than 40 pixels in height, although other sizes may also display with good quality.

To change the logo from ours to yours simply locate the logo file on your hard drive or local network by clicking the Browse button, and then clicking Save.

You can restore the AppShore logo by clicking the Restore button.

Drop Down Lists

Here is where you can customize the contents of the standard AppShore drop down lists and create new ones for your specific purposes. Drop down lists are useful for several purposes:

- Reduction of data entry and data entry errors: Where practical it is useful to use a drop down list to allow Users of the system to select a value from a list of common choices rather type the value repetitively for each new record created. This approach also reduces the possibility of data entry errors and facilitates a cleaner more accurate data base.
- Categorizing, searching and sorting: It important to think about how you want to categorize or group your records before engaging in other detailed customization of your application. The drop down lists you create can be used in the Search criteria to facilitate easy searching and filtering of records based on category or group. They can also be used in the Search results area where records can be sorted by the values in the drop down list.
- Bulk operations: Drop down lists can also be used in the Bulk operations area where you have the ability to change en mass the values of fields. Think about circumstances under which this feature may be useful while creating your new drop down lists.

Customizing drop down lists

To customize an existing drop down list, whether one of our standard drop down lists or one created by you, select it from the drop down menu labeled 'Drop down list' by clicking on it name.

Each entry in the menu must have both an Identifier and a Label and they must both be unique. You can replace our standard entries with your own by simply changing the Label. You can also add more entries and delete entries.

To add a new entry, go to the first available blank row and enter a unique Identifier and a unique Label for the new entry and click Save (or enter as many as you like before clicking Save). Once you have run out of available blank rows, after you click Save, five more blank rows will automatically be presented. A drop down list could have hundreds of entries. Entries will automatically be listed in alphabetic order.

To delete one or more entries from a drop down list, check the box(es) next to the entry(ies) and click the 'Delete records' button.

Words of Caution

Caution! Clicking the 'Delete' button (as opposed to the 'Delete records' button) will delete the entire list! If a List is deleted you will have no way to automatically recover it yourself. You will have to recreate it or contact AppShore and ask us to restore it for you. If you have already used the list, the records previously containing the list will no longer contain the field and all contents of the list will be removed from all records where values of the list were previously saved. If you recreate the list you will then also need to repopulate all the records with the appropriate values. This will probably need to be done from memory unless you were wise enough to do an export to back your data base before customizing it, a practice AppShore highly recommends. AppShore charges a service fee to restore tables. Be very careful when deleting entries from drop down lists. Be sure to use the 'Delete records' button and not the 'Delete' button.

You should also be very careful when modifying Identifiers of entries in drop down list. If you change the Identifier of an entry in a drop down list you will lose all information in all records where that that entry had been used. For example; if you have an Opportunity Stage entry with a Label of Contract Negotiations and an Identifier of 5, and you change the Identifier to 4, any Opportunity records that had the value of Contract Negotiations in the Stage drop down list will no longer contain this value and you will have lost that portion of the record. Try to avoid changing the Identifiers of drop down list entries after you have data in the data base. AppShore can restore your data base to the previous daily back up (up to 30 day), but we charge the service.

There is no risk of losing any data if you only change the Label of an entry.

Customization of Applications

Templates

Templates are used in the Web mail and Campaigns applications. A Template is a saved, reusable message or portion of a message that you want to make available to Users in order to increase efficiency and avoid redundant message creation and formatting. For example, you could create Templates for commonly used messages such as introductory messages, thank you messages, follow up messages, or any other type of message that is sent out regularly by your Users or that you would like to make available for use in a Campaign.

A Template must have a Name and a Subject. Use the various formatting icons to construct the Template in the style and form you like.

Once a Template has been saved it will be available for all Users from the Template drop down menu of the Web mail form and from the New Campaign form.

For Templates used in Campaigns, you can insert dynamic fields into the text of the message to personalize it to the recipient. For example, if you want your Campaign message to start with 'Dear {First name},' you can insert the dynamic field called First Name into the Template after the word Dear. When the Campaign is sent, the value of the First name field of the Lead or Contact record will automatically be inserted into the message where the dynamic field was used.