C E N T U R I A

Lotus Notes Client R6/R7

and

SMB iCRM database
SMALL BUSINESS
CUSTOMER RELATIONSHIP MANAGEMENT

Installation & Configuration

More information: info@centuria.co.uk

Download Demo Version of SMB iCRM database:
http://www.centuria.co.uk

Lotus Notes Client download

To access **SMB iCRM** database, you have to download and install on your computer Lotus Notes Client or/and Lotus Domino Server software. Simply connect to the Internet (if not already connected) and type in the following address (or just click the link below):

http://www.lotus.com/downloads

Having entered the correct web address, Lotus Software Downloads page is displayed.

Go to *Featured trials* section and follow the instructions how to register and download the software.
For desktop installation only you should download Lotus Notes Client, for server and desktop installations you should download both Lotus Notes Client and Lotus Domino.
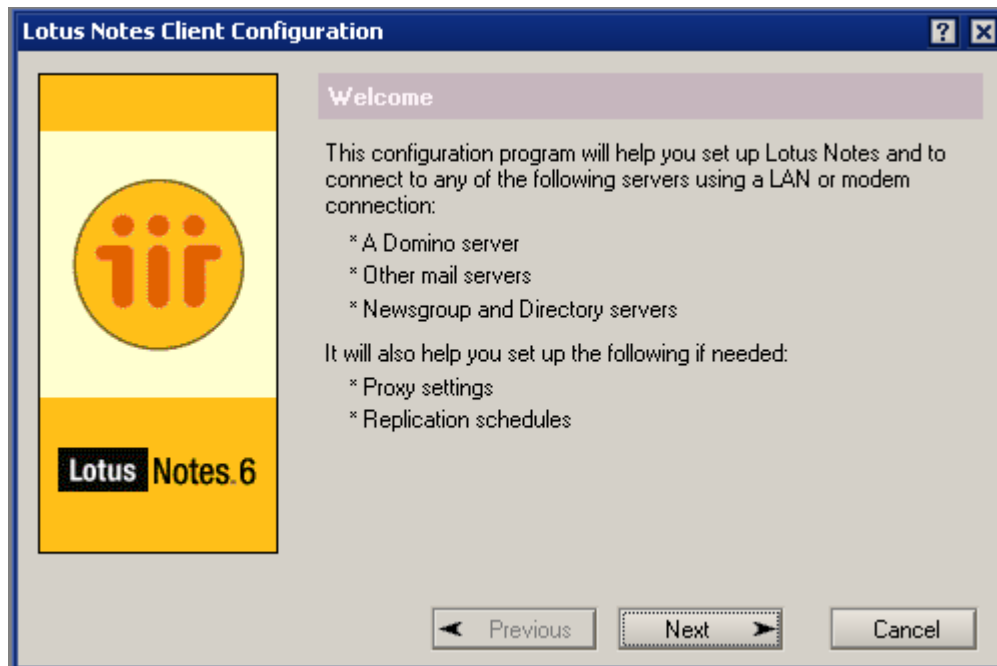
Lotus Notes Client configuration
(process is described for version 6.0.2, but similar installation should be done for
any other versions)
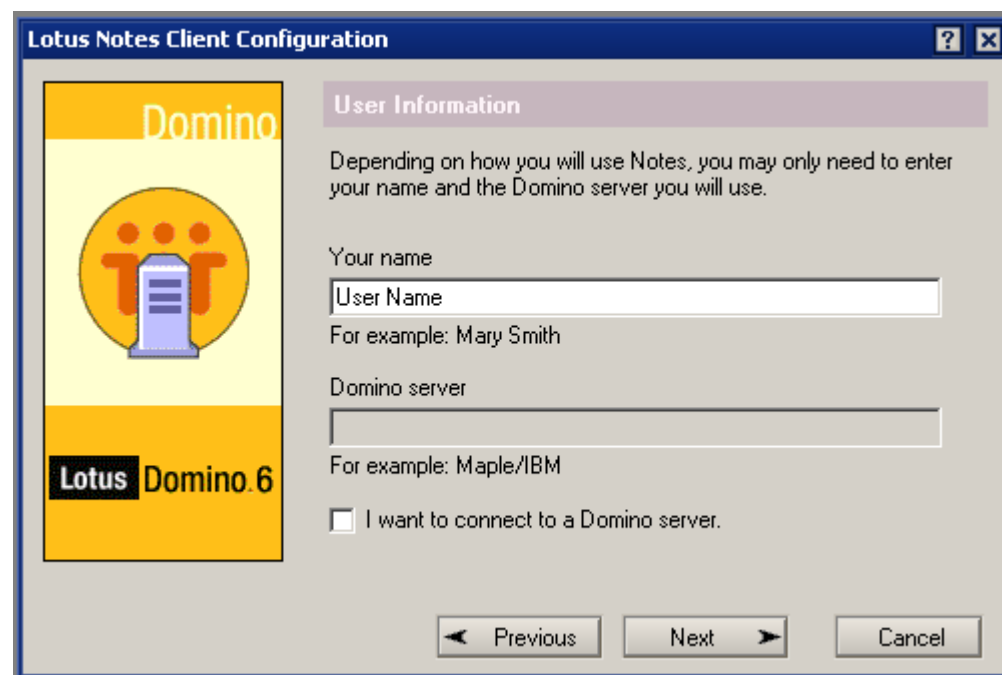
Install software on your computer.

When installation process is completed click the <u>Finish</u> button.

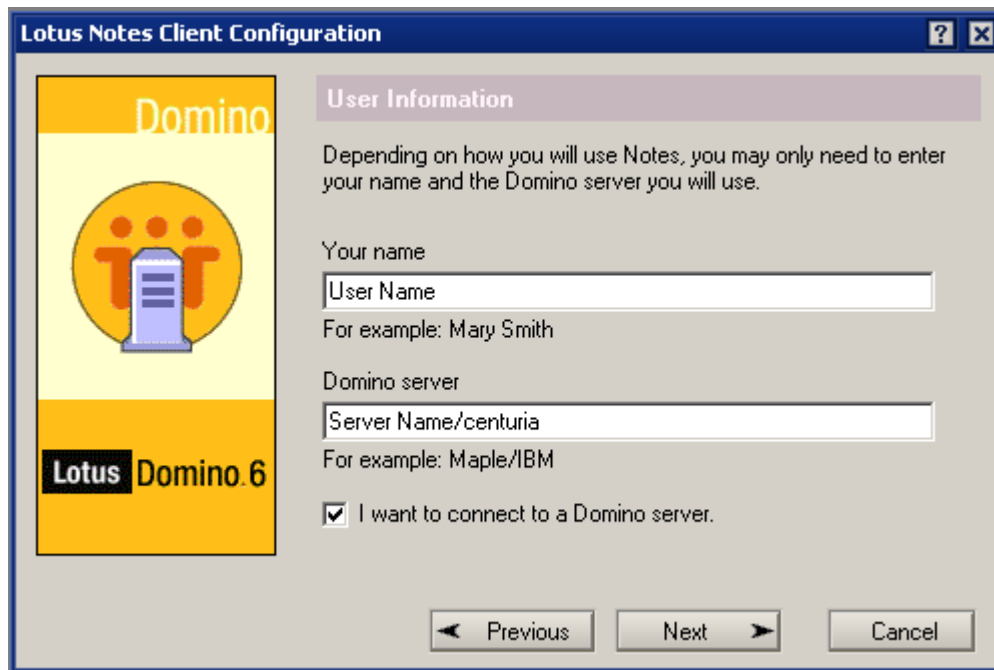Go to <u>Start</u> – <u>Programs</u> – <u>Lotus Applications</u> – <u>Lotus Notes</u>.
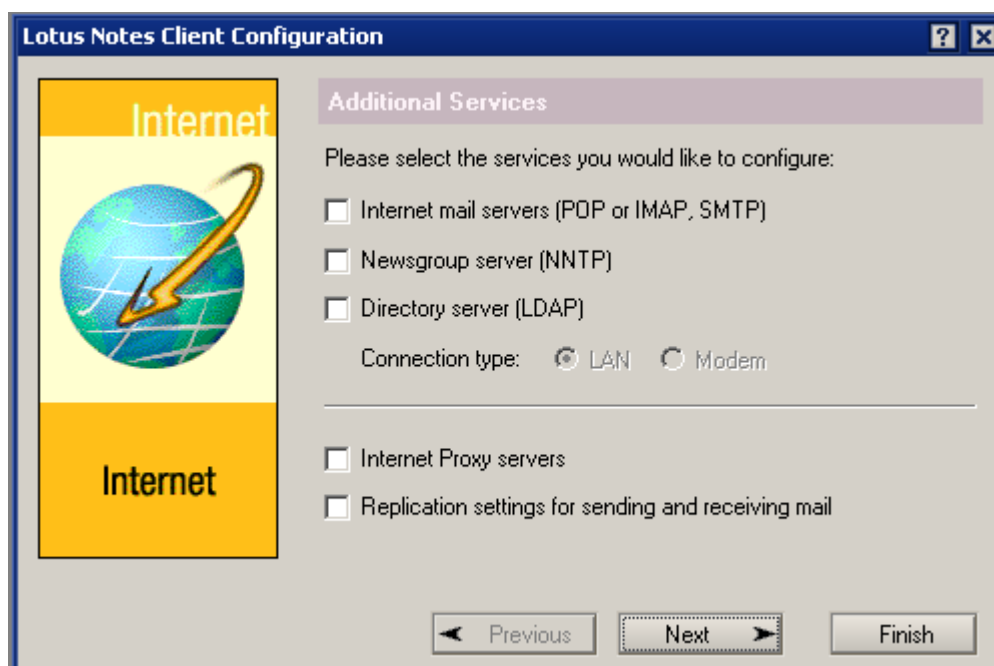

Click <u>Next</u>.

Enter your name in the Your name field and click Next.

If you want to connect to a Domino server select I want to connect to a Domino server option and enter Domino server name in Domino server field.

Without checking any boxes click Next button.

SMB iCRM database installation

Now you need make a copy of SMB iCRM nsf file into Lotus Notes root directory, usually: c:\Program Files\Lotus\Notes\Data\
Then add database icon to your bookmarks.
Select File-Database-Open from Menu or press and hold Ctrl on your keyboard and then press O (Ctrl+O).
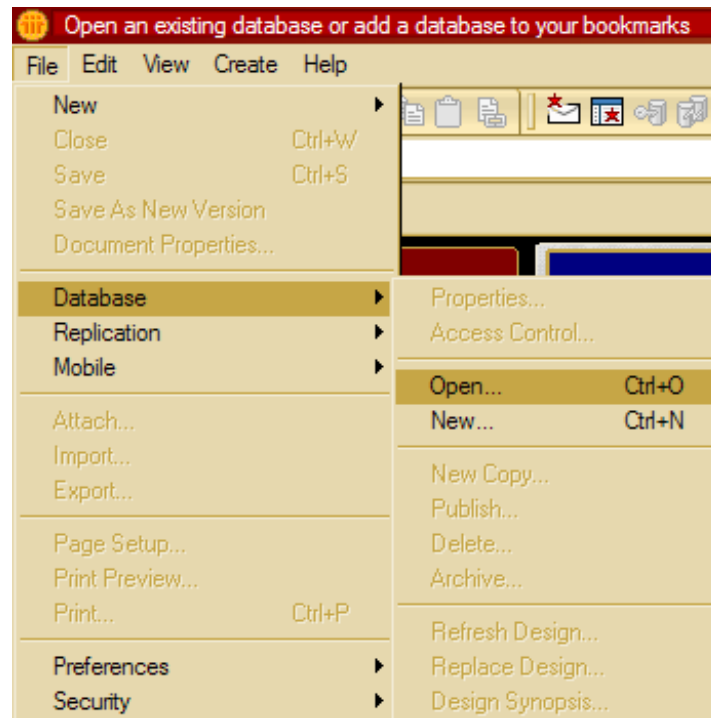
Choose server (Local for local database location: c:\Program Files\Lotus\Notes\Data\)

Find and select SMB iCRM database

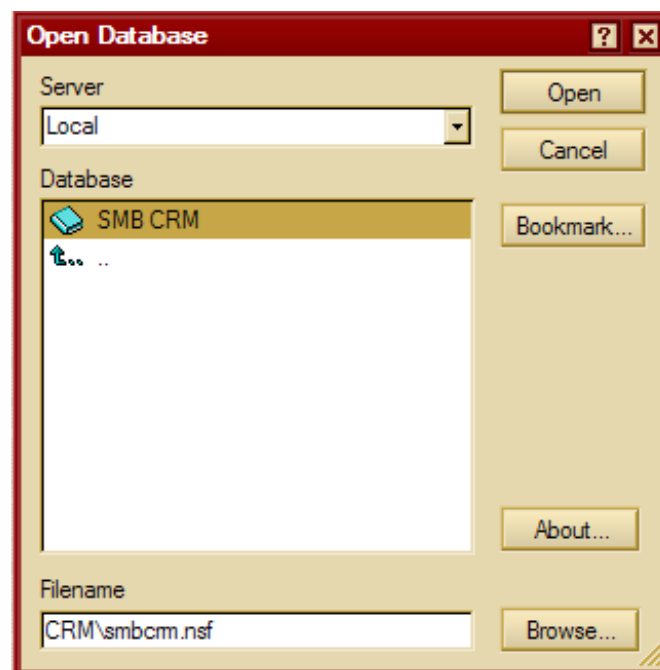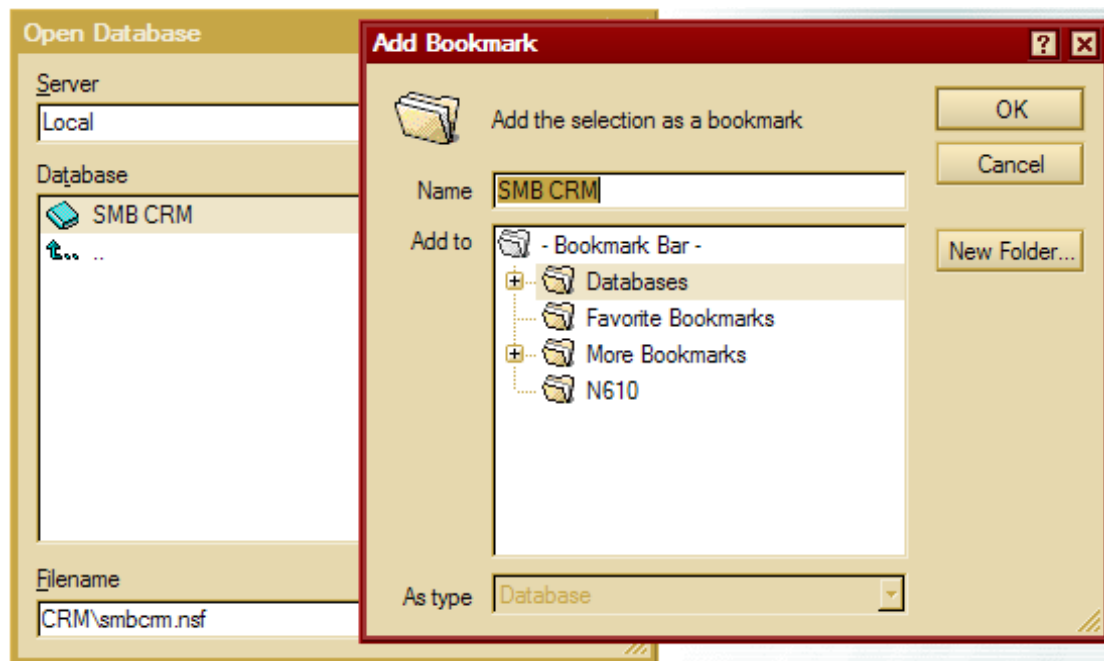Click Bookmark… to add SMB iCRM database to your Bookmarks (you can find them on your left-hand side of the screen).

Select Databases, Favorite Bookmarks, More Bookmarks or create a new folder and then click OK button.


If you selected Favorite Bookmarks you would be able to find SMB iCRM database in the Favorite Bookmarks section.

To open SMB iCRM database click SMB iCRM icon on your bookmarks page.
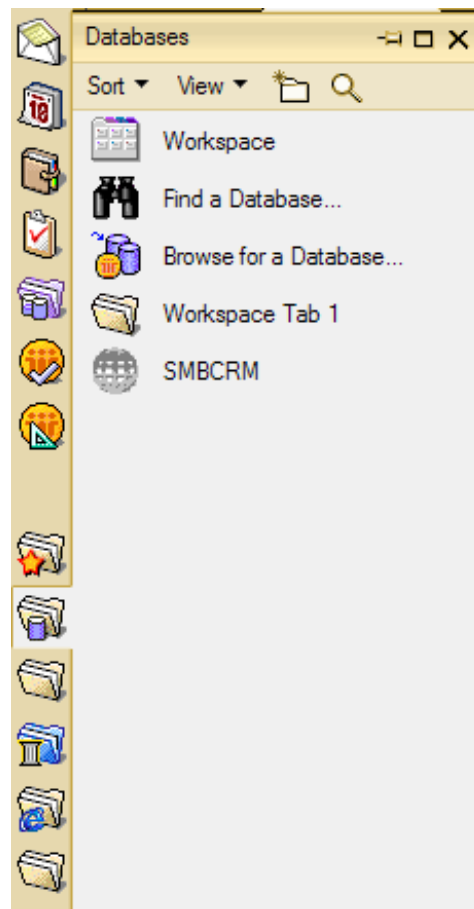
If while using the database you would see the Execution Security Alert window, select the option Start trusting the signer to execute this action and choose OK. You may need to do this more than once, but only while using a new feature for the first time.
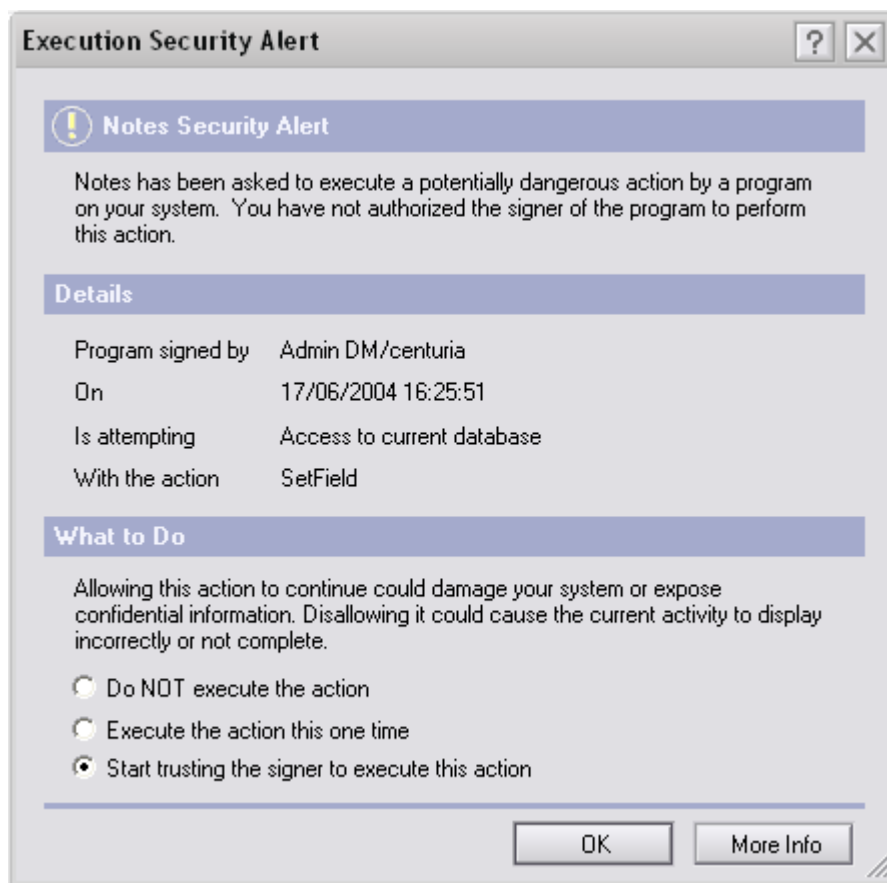
Now all the basic installation and configuration processes are finished. Your SMB iCRM database is open and you can start work on it and enjoy all its functionality.

If you have any queries whilst using SMB iCRM database, please do not hesitate to contact us: info@centuria.co.uk.

We are always looking to develop the functionality of the database, so if you have any further requirements or feedback we would like to hear from you.

If you wish to find more information please visit:

http://www.centuria.co.uk