

# iDeal CRM quick start guide

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# About iDeal CRM software

The iDeal CRM is a user-friendly, easy-to-understand customer relationship management (CRM) software for getting your company's data centralized and organized. It supports the invoicing, contact management, project management, business history, business tasks, reminders, knowledge base and many more customer related functions.

It was built using the award winning FileMaker database engine and supports the Windows XP, Windows Vista, Windows 7 and Mac OS X operating systems as well.

The iDeal CRM software is available in a very affordable single user edition and a network capable multi user edition too. Please visit our site ([www.crm.fm](http://www.crm.fm)) for more information.

You can download a fully functional version of the single user edition from our site which will stop working after 30 launch. To continue using the iDeal CRM after that, you will need to purchase a license ([www.crm.fm/purchase](http://www.crm.fm/purchase)). After buying an iDeal CRM license, you will receive a license code that can activate your copy, so you don't need to download the iDeal CRM software again and you can keep using the data you have created with it.

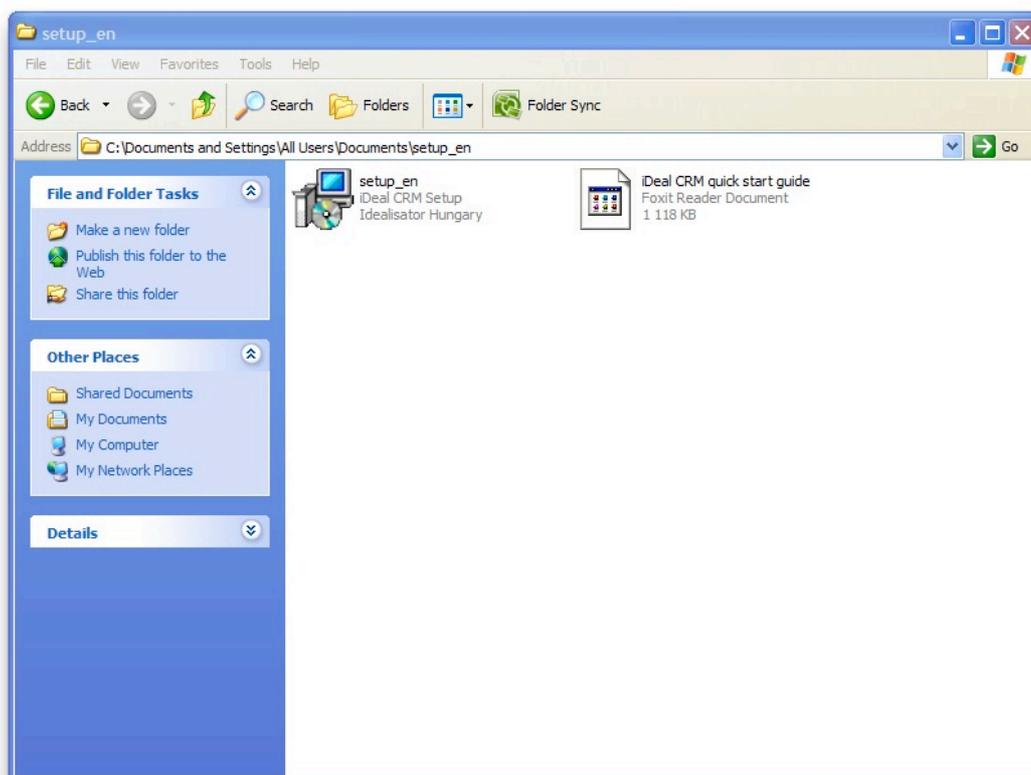
# Downloading and installing iDeal CRM

The most recent version of the iDeal CRM software is always available on our site. If you had downloaded our software from a mirror site, please check the [www.crm.fm/download](http://www.crm.fm/download) page for the latest version.

## Installing on Windows

After you download the compressed file from our website, unzip it. There you can find two files in the unzipped folder:

- **setup\_en.exe** - iDeal CRM installer file
- **iDeal CRM quick start guide** - installing and getting started guide for iDeal CRM software



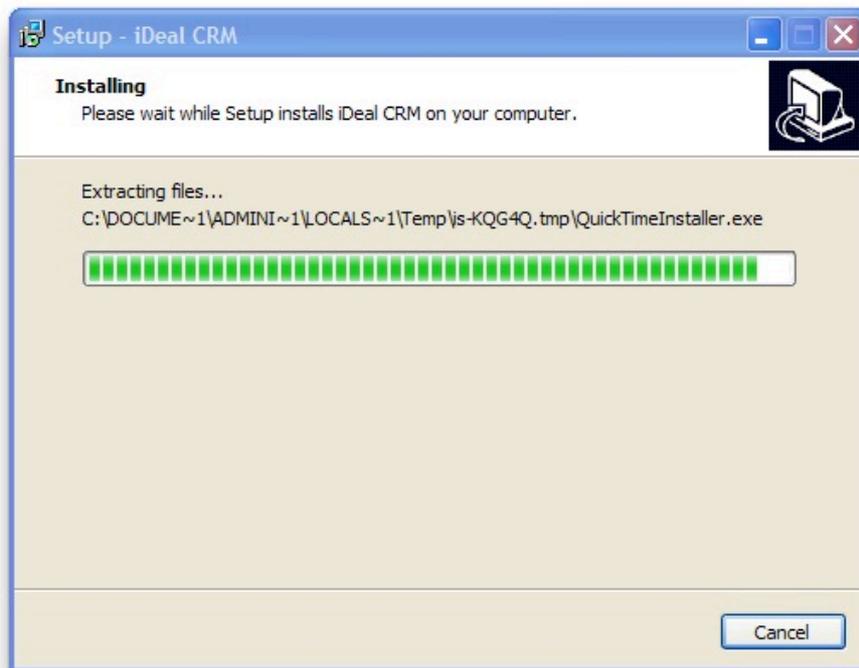
Double click on the “setup\_en.exe” file, start the installer and you will see the welcome screen.



Click on the “Next >” button, and read the license agreement. If you agree with it, select the “I accept the agreement” button, and click on “Next >” button again.



Get through the other installer setup screens and wait while iDeal CRM is being installed on your computer.



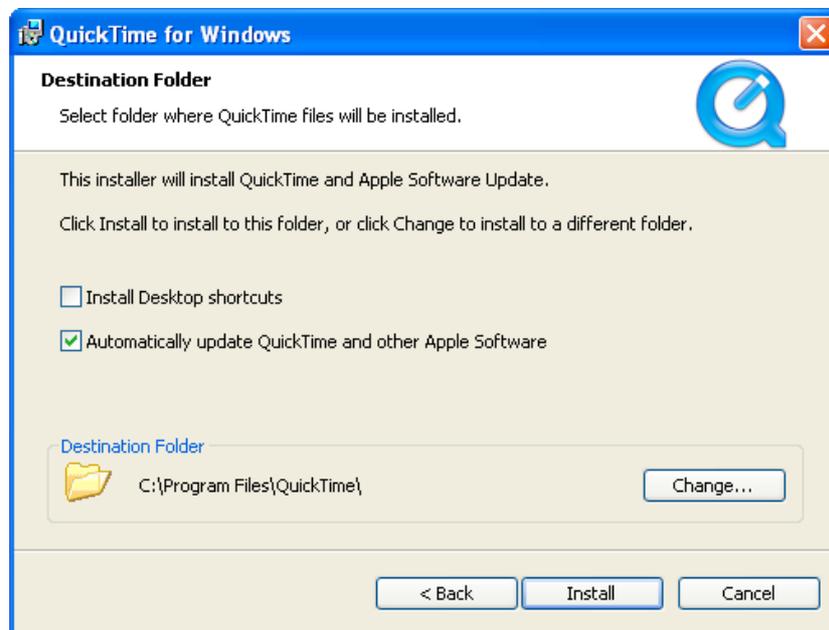
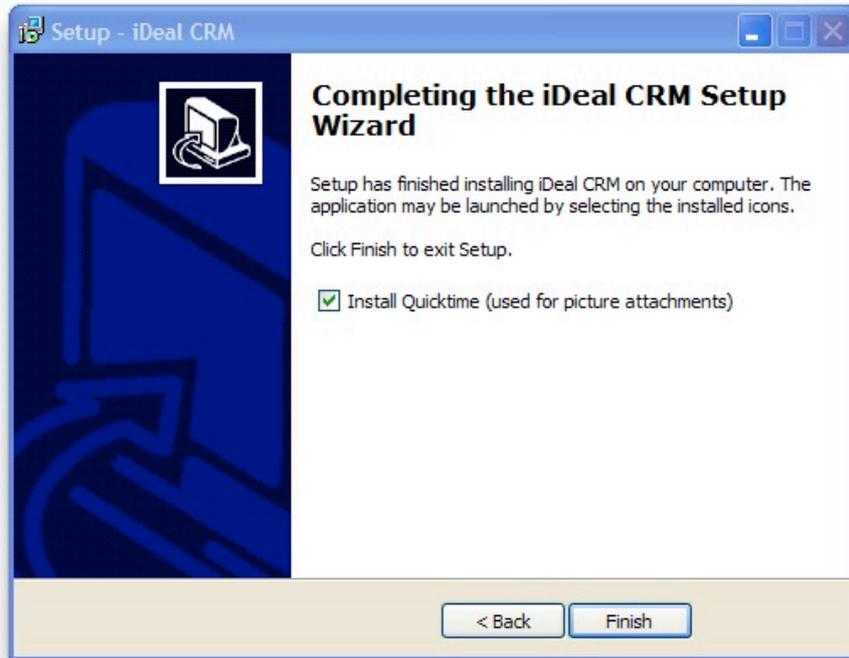
When the installation process has finished, you may need to have QuickTime. If you don't have it, you can install it right after the iDeal CRM.

### More information about QuickTime

QuickTime is a multimedia architecture developed by Apple Computer for Mac OS, Mac OS X, Windows, and other platforms. It allows your computer to work with real-time movies, sounds, and high-quality compressed images.

iDeal CRM uses QuickTime to handle attached images. The iDeal CRM works without QuickTime as well, but in that case it can not generate thumbnails from the attached pictures.

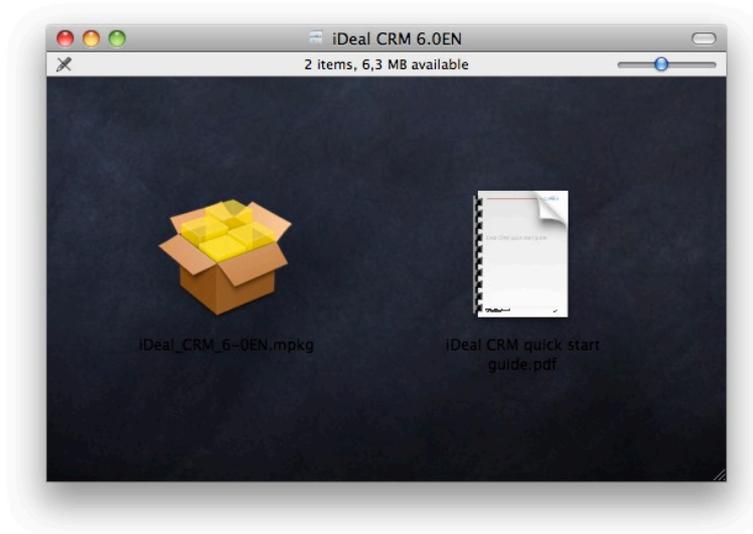
If you want to install the additional QuickTime software just enable the “Install QuickTime” check box on the last screen and click on “Finish” button. The additional installer will start automatically.



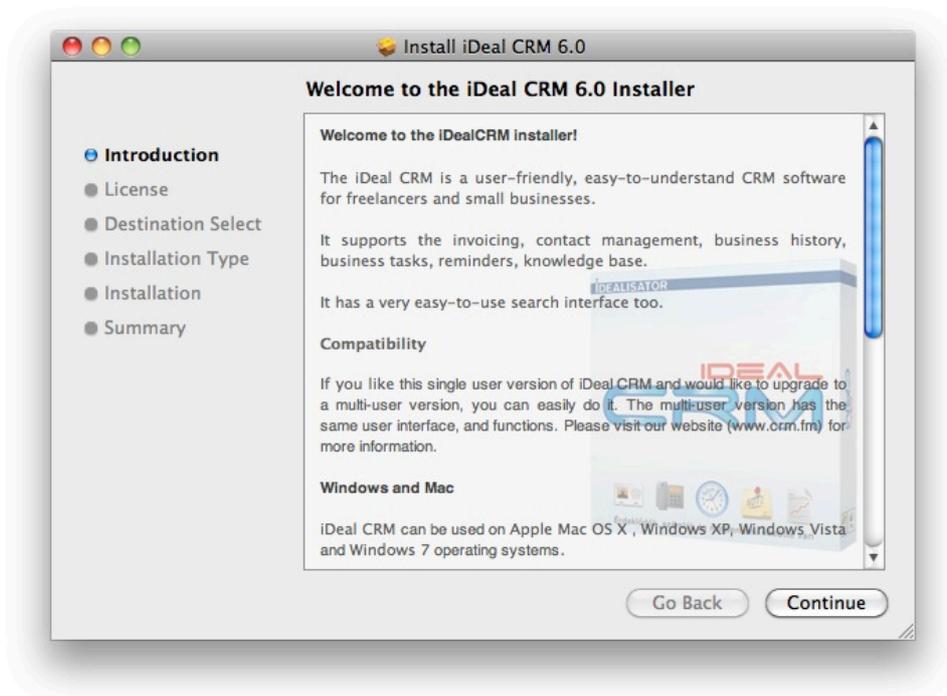
## Installing on Mac OS X

After you download the DMG file from our website, double click on it. In the mounted disk image you can find two files:

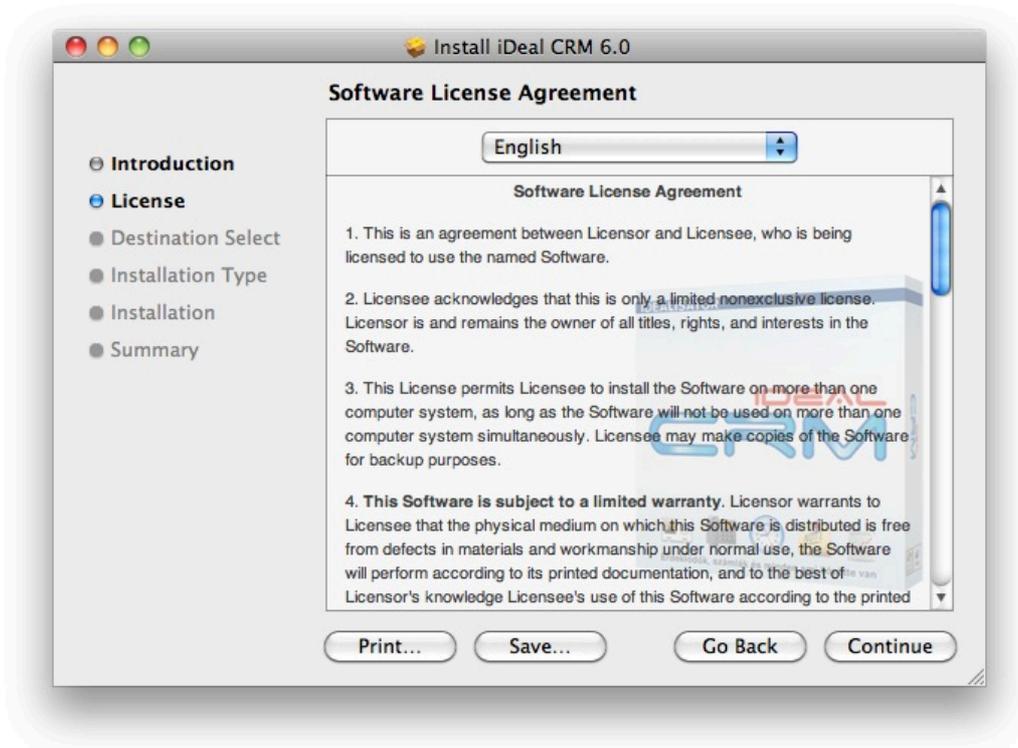
- **iDeal\_CRM\_6-0EN.mpkg** - installer file
- **iDeal CRM quick start guide** - installing and getting started guide for iDeal CRM software



Double click on the “iDeal\_CRM\_6-0EN.mpkg” file, start the installer and you will see the welcome screen. Click on the “Continue” button.



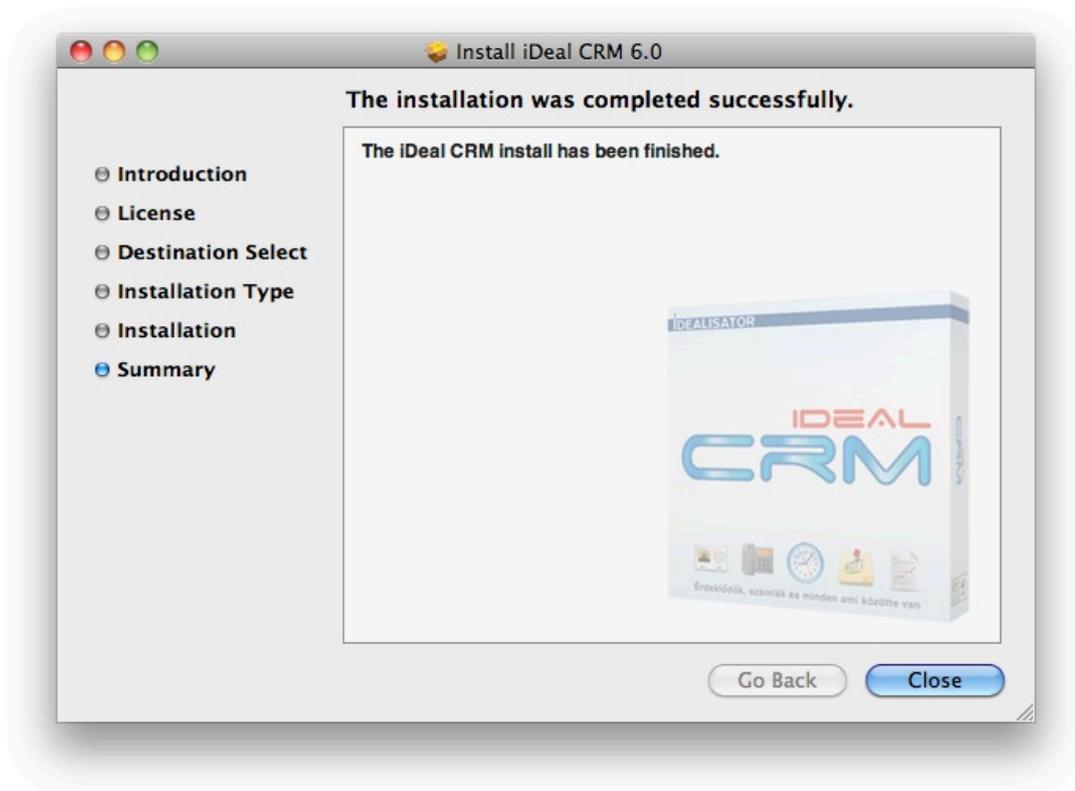
Read the license agreement on the next screen. If you agree with it, click on the “Continue” button, then click on “Agree” button.



Before the installation you need to authorize yourself as an administrator user. Please type your name and password into the authentication dialog.



Wait while iDeal CRM being installed on your computer then click on “Close” button.



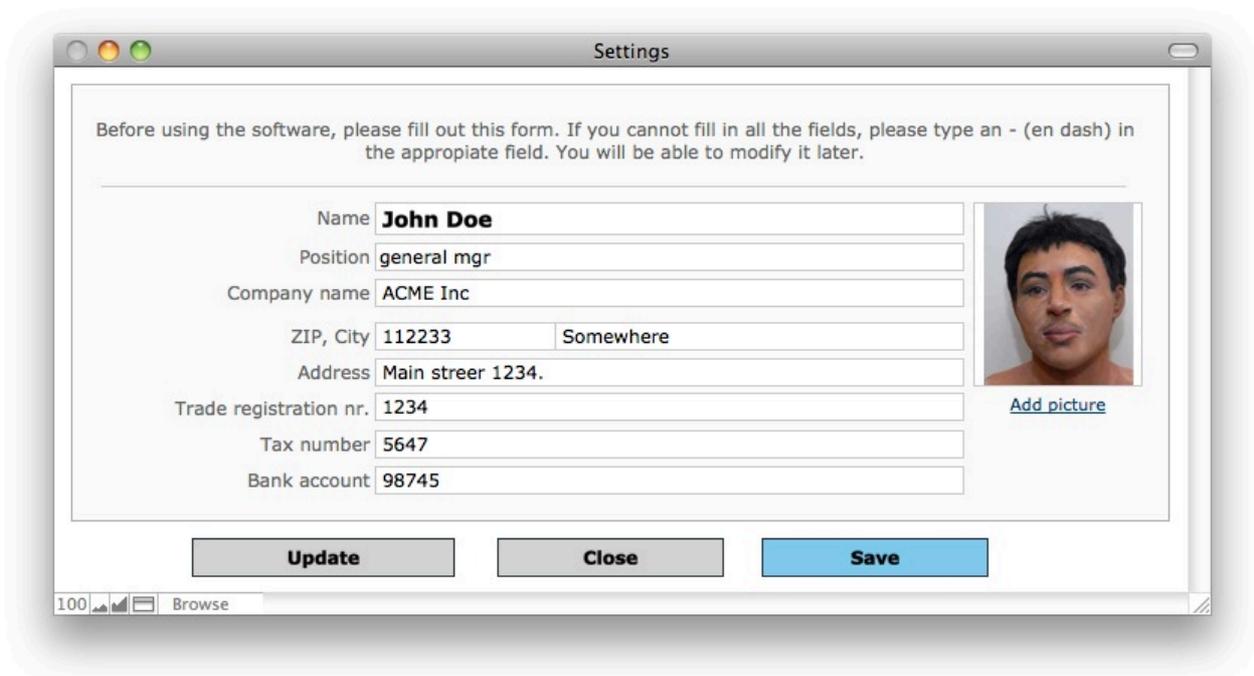
# iDeal CRM first launch

On Windows the installer will place a shortcut icon into your desktop. Click on this shortcut and launch the iDeal CRM software. The installed iDeal CRM folder is in My Computer\C:\Program Files folder.

On Mac OS X operating system you can find the iDeal CRM folder among the Applications. Open this folder and drag the CRM application icon onto your dock. Click on this icon and start the iDeal CRM.



First of all you have to fill up a general information form.



The screenshot shows a 'Settings' window with a form for user information. The form contains the following fields and values:

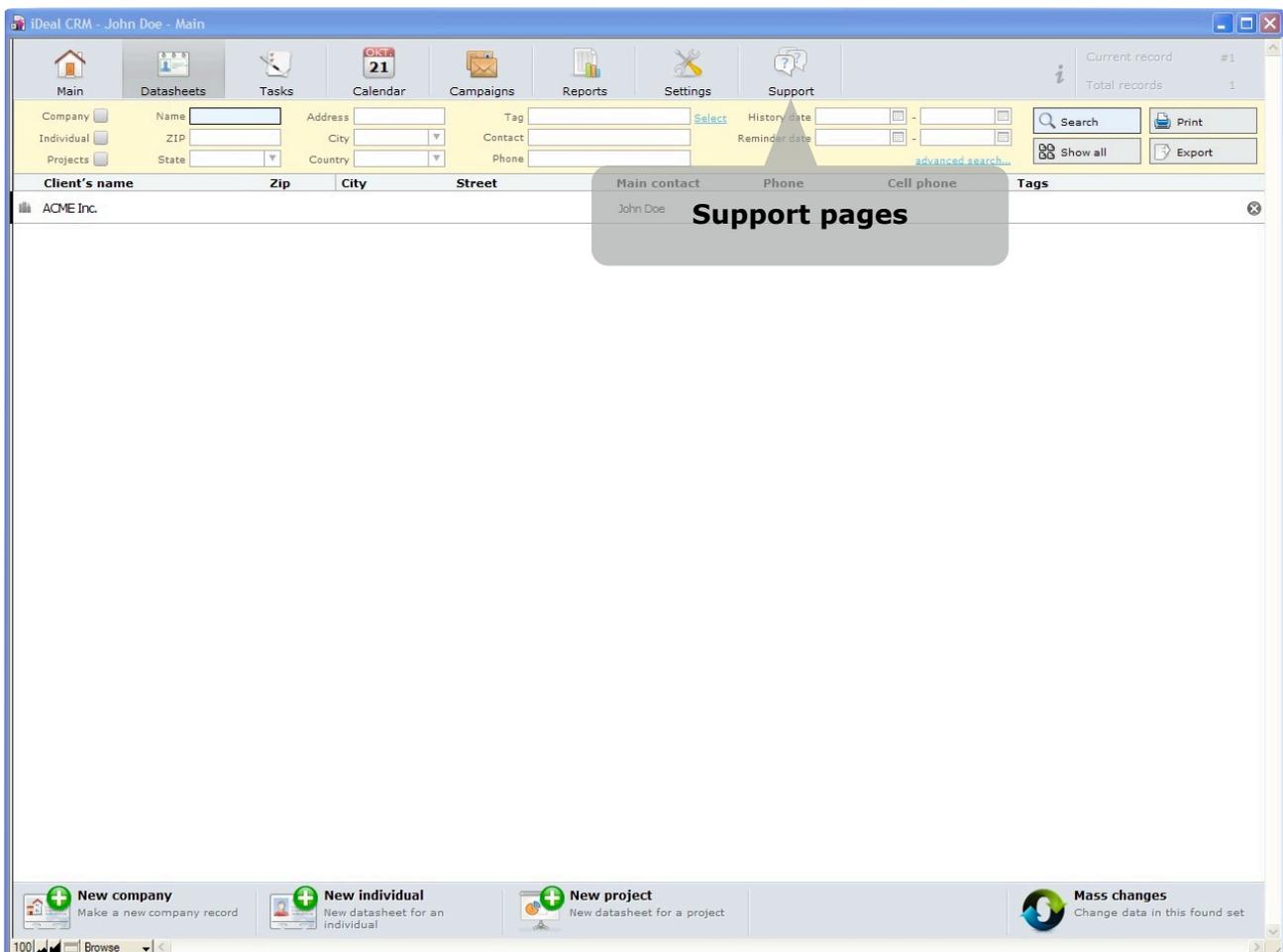
|                        |                   |           |   |
|------------------------|-------------------|-----------|---|
| Name                   | John Doe          |           |  |
| Position               | general mgr       |           |   |
| Company name           | ACME Inc          |           |   |
| ZIP, City              | 112233            | Somewhere | <a href="#">Add picture</a>   |
| Address                | Main streer 1234. |           |   |
| Trade registration nr. | 1234              |           |   |
| Tax number             | 5647              |           |   |
| Bank account           | 98745             |           |   |

At the bottom of the form are three buttons: 'Update', 'Close', and 'Save'. The 'Save' button is highlighted in blue.

After you clicked on the “OK” button, the login window will appear. Type your user name into the “Name” field. This is the same name what you gave in the first field of the “Settings” window shortly before.

If you set password in the “Settings” window, type your password in the second field. If you didn’t set it before, **leave this field empty.**

If you enter the correct information into the login window, the main page will appear.



**Congratulations!** You just started to use your brand new iDeal CRM copy. :-)

If you have questions about using iDeal CRM, please visit the Support pane in your software.