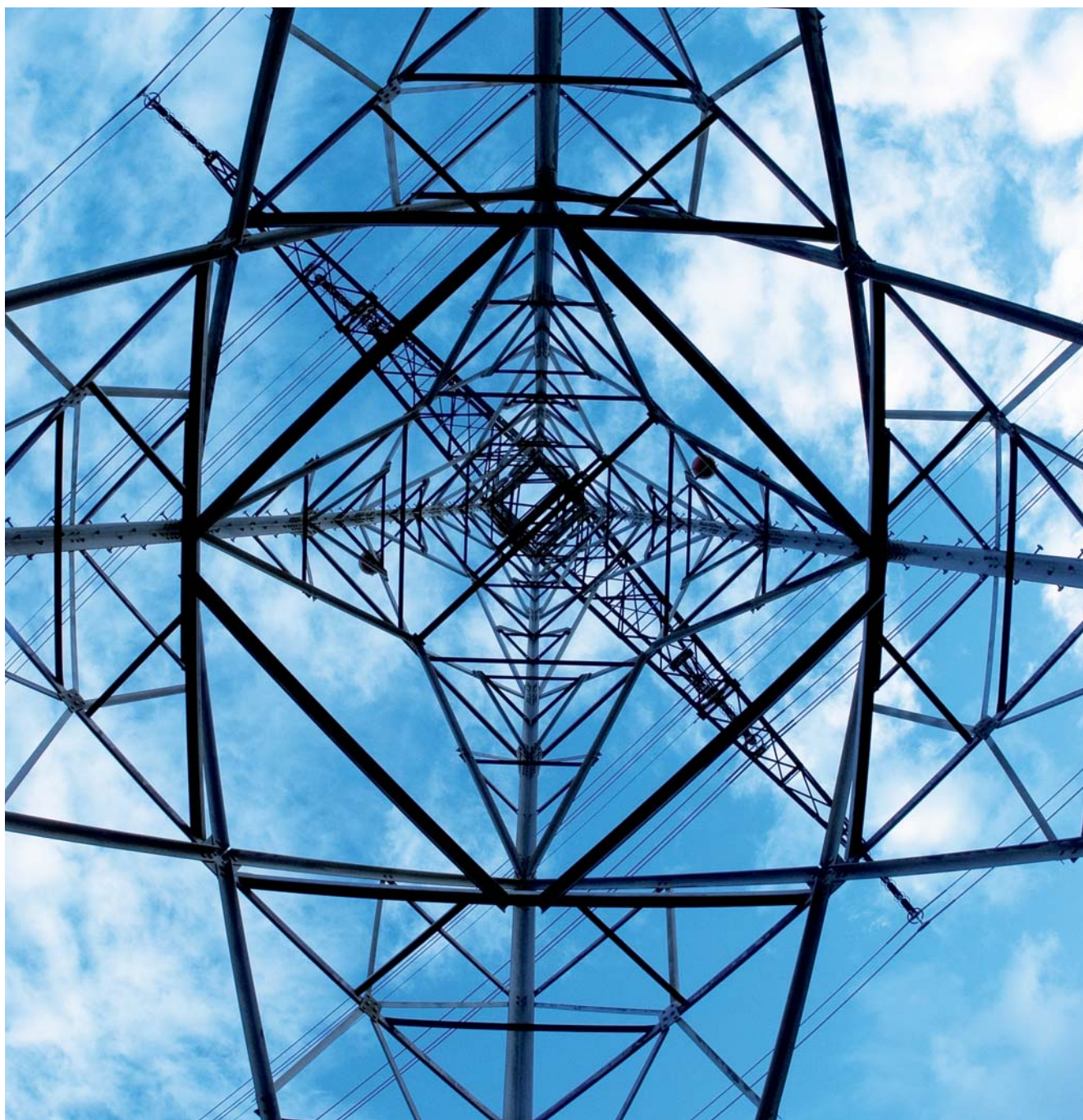# Feature chart

TINA
*Business Process Management
for DSO*

Revolutionary business process optimization with CRM solutions of the newest generations: CRM Leadership, Made in Germany.

Would you like to increase the efficiency of value adding processes too?
Branch specifically adapted, TINA is your control center for all information and communication processes. You will reach an individualization of the relationship management with simultaneous standardization of Workflows.

With the CURSOR modular system you get an easy, fast and goal-oriented head start with a tested and proven, preconfigured solution.

Additional modules can be added anytime, like in the areas Call-Center, Campaign management, analytic CRM, as well as integration solutions for all IT systems relevant in day-to-day business.

The result: Increased quality and decreased costs through optimal support of all customer and market orientated business processes. Your customers are delighted by individual, custom-tailored services and convincing customer support. You profit from the extensive support and optimization in distribution, marketing and customer service.

Increase your business success – with TINA

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Content

Person model

Person

- Master data to a natural or legal person
- Customer number
- Relations between persons
- Potential evaluation based on person
- Consolidated display of data to all roles
- Person portrait
- Miscellaneous person statistics

Business Partner

- Role of a person
- Creation of a business partner to an existing or new person
- Duplicate check
- Quick entry mask
- Business partner number
- Competency regulation
- Specific data to business partner
- Business partner portrait
- Relations between business partners
- Potential evaluation based on business partner
- Miscellaneous business partner statistics

Contacts

- Role of a person
- Duplicate check
- Quick entry mask
- Specific data to contact
- Automated international greetings generation
- Relations between contacts
- Import of Groupware contacts with Drag & Drop*
- Contact portrait
- Miscellaneous contact statistics

Employee

- Role of a person
- User management
- Authorization management
- Automated greetings generation

Addresses

- Multiple addresses to a person and/or their roles
- Distinction between address types (Box and street addresses) and delivery (Office, home...)
- Automated adoption of addresses when creating new roles
- Separate allocation of an address to a role
- Default addresses

Telecommunications

- Multiple connection data to a person and/or their roles
- Automatic adoption of connection data when creating roles
- Separate allocation of connection data to a role

Energy supply

Connections

- All data for connecting production units or consumption installations, product type dependent
- Distinctive allocation to a connection object
- Customer generated

Installations

- All data to consumption locations, also product type dependent
- Distinctive allocation to a connection object and a business partner
- Billing data
- Customer generated

Connection objects

- Distinctive address

Measuring facilities

- Meter management
- Allocation to installations, connections or connection objects

Contract account data

- Collector of multiple contracts of a business partner
- Bank data, addresses

Grid operation fees

Communication

Activities

- To persons, business partners, contacts, employees, projects, requests, quotes and products
- Time reference of an activity (from-to, date and time)
- Status information
- Colored accentuation of appointments, tasks and expired activities
- Delegation of activities
- Activity links
- Creating single letters and email from activities*
- Replication with Groupware system*

Single letters

- Automatic generation of a single letter after selecting a document template
- Transfer of data to text marks in single letter
- Editing and printing in Word
- Automatic assignment of a file name

- Opening existing letters to read or edit
- Creating, editing and managing of document templates

Emails*

- Generating emails out of an activity or out of an email address entered in a memo- or email field
- Differentiated handling of internal and external emails*
- Automatic entry of addressee
- Adoption of subject, text and attachments
- Adoption of changes in the email to the activity
- Transmission report in activity
- Highlighting of newly received emails
- Manual or automated import
- Email import per Drag & Drop*
- Adjustable Inbox
- Automatic identifying of addressee
- Reply to email*
- Email signature through TINA*
- Saving the original email as attachment to activity*
- Generating email with link to dataset (opening the dataset from the email)*

Newsticker*

- Status bar with current news
- Status bar can be hidden when no news available
- Colored accentuation of priority

Analysis and evaluations

- Activities cumulated
- Activities overview
- Activities overview by employee
- Miscellaneous activities statistics

Organization

Projects

- Project assessment
- Differentiation by project types
- Assigning authorities competency
- Project number
- Project links

Activities

- Appointment planning
- Resubmissions and reminders
- Conference planning
- Business trip management

Reminder function

Analysis and evaluations

- Visitation preview
- Travel costs
- Appointment overview
- Weekly report
- Week planning

Marketing / Commercial sector

Requests

- Assessment of status and prospects
- Assigning of competency
- Order number
- Profit margin

Quotes

- Quote positions with multiple position levels
- Export of quote positions to Excel
- Warning when falling below the minimum retail price
- Creating a quote document
- Payment and delivery conditions per customer and quote

- Quote positions in foreign currencies
- Tracking of the respective quote status

Contracts

- Special terms contracts and tariff customers
- Mapping of single contracts (e.g. supply contracts, grid contracts, contracting) and framing agree- ments (e.g. general framing agreements, supplier framing agreements)
- Contract links
- All contract relevant data, also product type dependent
- Contract documents
- Contract account data
- Billing data
- Price calculations
- Energy demand
- Customer generation

Products

- Basis for creating quote positions
- Details about sizes, costs and prices
- Grouping of products
- Product description in different languages

Analysis and evaluations

- Potential analysis
- Sales volume projection
- Request lists by employee, business partner or as general overview
- Order stock
- Won and lost requests
- Prognosis
- Provision shares
- Top 20 requests
- Sales preview by employee

- Goal fulfillment per business partner
- Quotes portrait
- Price lists
- Miscellaneous request statistics

Marketing

Serial letters

- Compilation of addressees with any selection criteria
- Saving selection criteria for further serial letter actions
- Use of document templates
- Attachments
- Generating of Word control file (e.g. to create address labels for external parcel service)
- Subsequent changes to serial letter
- Protocoling and tracking of serial letter through activities
- Returns management

Serial emails*

- Compilation of addressees with any selection criteria
- Saving selection criteria for further serial email actions
- Use of templates for the email text
- Application files as attachments to email
- Subsequent editing of the email text in the Groupware system
- Preview and test run
- Protocoling and tracking of serial email through activities
- Returns management

Extended information sections

Notes

- Special space for important information independent of other fields
- Memo field for any length of text

Documents

- Adoption and saving of relevant documents
- Document management
- Integration of a document management system*
- Allocation of files per allocation browser or Drag & Drop
- Attachment of documents to single letters, emails*, serial letters, serial emails*
- Historization
- Saving of application file in database or linking to external directory
- No storage limit on database
- Keyword assignment for easy finding
- Starting application program when loading application file
- Creating local copy

Free fields

- Any amount of additional fields
- Free fields are analyzable

Complaints management

- Receiving complaints media independently through email, Internet form, phone, personal contact (report), scanned documents
- Handling of complaint and easy case documentation

- Automated replying analog to receiving medium
- Knowledge based Workflow control
- Escalation management
- Solutions data base
- Evaluations and support for quality management

Search functions

Search

- Adjustable searches
- Search through all entities and links
- Saving of a search (for users, groups and system wide)
- Sorting and filter functions for search result
- Copy search result in clipboard
- Export search result to Excel
- Research function with display of additional information to found data
- Print search result

Yohooo!-Search*

- Full text search
- Search for one or several key-words in the entire data base
- Entry and start of Juhuuu!-Search from the switch panel
- Own program window
- Switching between TINA and Juhuuu!-Search through task switching
- Display of search result analog to Internet search engine
- Input rules analog to Internet search engine
- Configurable search

Favorites

- Direct loading of a dataset
- Favorites management

Quick searches

- Direct start of a certain search
- Loads from navigation area, menu list and main window

Evaluations

- Evaluation tool JasperReports
- Over 100 default evaluations
- Create own evaluations
- Option of NOT-queries
- Adjusting existing evaluations
- Extensive search and filter functions as prefilter
- Graphic display for a quick overview
- User individual desktop diagrams for a quick overview of own workspace
- Simple reports through Excel export

Handling and comfort

Window technique

- Multiple window technique
- Switch between windows
- Window control through switch and navigation bar
- Form view for editing a single dataset
- List view for editing multiple datasets
- Displaying and editing linked datasets in same main window

Navigation

- Navigation area for selecting data areas (main entities) and displaying linked datasets
- Individual area for own and often used functions and datasets (myTINA)
- Direct access to third party applications
- Easy switching between multiple editing levels
- Display of dependent datasets in sub area through tabs

Field functions

- Lookup and key fields with validating function
- Options and marker fields
- Date fields with calendar function
- Memo fields with memo window to fully display long texts
- Phone number fields with automatic dial function*
- Fields for web addresses with load function
- Fields for email addresses with function* to create email
- Plausibility check

Lists

- Adjustable column and sorting order
- Column filter
- Settings savable
- Browse
- Simultaneous editing of multiple datasets

Links

- Create, edit and delete links through field input (1:1) or through allocation browser (n:1)
- Display of links in navigation area, in main window and in dialog window "Existing allocations"

Loading TINA from third party applications

User settings

- User individual settings for many program functions and components
- Lists (e.g. automatic editing mode. Background color for selected line, blend out lines)
- Navigation area (e.g. amount of displayed datasets, hide empty nodes)
- Fonts for navigation area, field description, entry fields, list entries
- Activities (e.g. color of certain activities, handling of email import)
- Integration (e.g. directory settings for Excel templates and export)

Workflows*

- Predefined succession of activities based on triggers and actions mapping a business process
- Manual and automated triggers, actions and escalations
- Undo Workflow steps
- Graphic display and selection of applicable Workflows
- Escalation management*
- Display of all steps and components of a running Workflow

Homepage

- Individual greeting after logging in to TINA
- Daily changing motto of the day
- User individual desktop diagrams for a quick overview of own workspace
- Individualizing of homepage with personal picture

Multilingualism

Tools

- Save workspace
- Switch dialogs on/off
- Display of logged in users
- Display of running processes

Online help

Data processing

- Create, edit and delete datasets
- Copy datasets
- Load single or multiple datasets (edit in lists)
- Linking of datasets (partially with attributes)
- Duplicate check
- Number generating
- Print

Interfaces and loading third party applications

General

- Interfaces to any system
- Loading third party systems with transfer of data and parameters
- Loading of application files from different locations within the application (e.g. activities)

Word integration

- Create and edit single and serial letters
- Use of single and serial letter templates
- Transfer of data to text marks in single and serial letters

Bidirectional Groupware integration*

- Manual or automated import
- Sending, receiving and replying to email
- Editing emails in TINA and in Groupware system
- Serial emails
- Contact replication
- Appointments and task replication

Bidirectional Excel integration

- Transfer of data from TINA to an Excel document*
- Write back of data from an Excel document to TINA

Phone implementation*

- Phone in- and outbound*
- Automatic phone number dial by mouse click
- Caller ID
- Load contact data
- Adoption of call data into an activity
- Callback function
- Through TAPI or phone system

SAP integration*

- Complete access to all SAP data through referenced loading in accordance to the SAP Authorization Management*
- Automated bidirectional data replication of relevant data*

Tools

Administration console

- Internationalizing
- System settings

- Customizing with import/export function
- Creating individual search field indices
- Key maintenance with import/export function
- Configuration of reports
- Configuration of document templates for single letters, quotes, serial letters, emails (signature)*, serial emails (signature)*
- Configuration of "Complex searches" for reports, serial letters, serial emails*, export (contact replication, offline synchronization)
- Configuration of Yohooo!-Search*
- Configuration of TAPI interface*
- Configuration of contact replication to Groupware contacts*

System settings

- System wide settings for many applications and components
- Auto log-in

Field customizing

- Field value dependent customizing
- Mass editing through administration panel or direct edit within applications
- Field properties like maximum length, mandatory field, input restrictions, avoid duplicate field values, warning on duplicate field values etc.
- Default values in new creations
- Key maintenance

Workflow engine*

- Workflow creator for the graphical creation of process progression and process definitions

Entity creator*

- Creation of individual entities (tables) for storing individual datasets for the main and sub areas
- Supplementation of default entities by additional fields
- Creation of n:m links to other entities
- Possible field types: Text fields, number fields, date fields, marking fields, memo fields, key fields with creating own key areas, lookup fields for selecting other entities
- Configuration check to avoid errors
- Import and export function

GUI builder*

- Adapting of certain masks or creating of masks for individual entities per Drag & Drop
- No programming skills required
- Direct access to database tables in selected entity
- List of unused fields
- Construction of mask with container hierarchy
- Display of container hierarchy in a level-view (tree-view)

- Field/component properties for aligning and editing of the component through X and Y coordinates on the form
- Multiple marking of components for aligning and editing
- Handling: Drag & Drop, navigation switches on the toolbar or menu list, alignment and editing of components per keyboard (Cursor keys) or per mouse, display of dynamic or absolute grid lines for aligning forms
- Import and export functions
- Editing of masks directly from the application (menu list Administration), through the entity creator or the administrative console

Mask configuration

- User group specific configuration
- Configuration of main and sub window sequence in navigation tree
- Visibility of entities (hide/unhide)
- Configuration of entries in file menu or through the Create New switch on the toolbar
- Configuration of sub window entries (configuration of default sub window)

Technology

- Programing with Java based on Sun JDK 1.4
- Component based software structure (based on Enterprise Java Beans)
- Three-Layer-Structure ("JavaEE")
- Server component running on Windows or Linux
- Deployment on multiple application servers (e.g. WebSphere, JBoss) possible
- Data changes via CMP as well as security features from application server
- Connection to different databases (e.g. Oracle, MS SQL-Server) through JDBC
- Automated test cases (JUnit, QFS)
- Swing Client (Webclient in planing for future releases)
- XML format for masks, mask logics, Workflows, searches, etc.
- Use of different Look-and-feel variables
- Automatic Swing Client update

*optional add-on

CURSOR
Software AG®