



# Manual

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BaseNet

# Table of Contents

<b>1. Getting started</b>	<b>2</b>
1.1. Logging In	3
1.2. System Structure	4
1.3. The 5 Pillars of BaseNet	5
1.4. Linking in BaseNet	6
1.5. Tips & Tricks	8
1.6. Search Screens	9
1.7. Main Menu	10
1.8. Security Explanation	11
<b>2. Do's and Don'ts</b>	<b>12</b>
2.1. Do's	13
2.2. Don't's	14
<b>3. Legal</b>	<b>15</b>
3.1. Legal Files	16
3.2. Role Administration	20
3.3. Matter Billing	22
3.4. Input Examples	25
<b>4. Collection component</b>	<b>31</b>
4.1. Importing collection files	32
4.2. Working from within the search screen with collection files	33
4.3. Creating a payment arrangement	34
4.4. Customer's received payments from counter party	35
4.5. Subpoena	36
<b>5. Contact management</b>	<b>37</b>
5.1. Creating a New Contact	38
5.2. Contact Selections and Mailings	42
5.3. Importing Contacts	44
5.4. Reattempting a Failed Import	45
5.5. Merging Contacts	46
<b>6. Calendar and Tasks</b>	<b>47</b>
6.1. Searching Through The Calendar	49
6.2. Creating tasks	50
<b>7. Correspondance</b>	<b>52</b>
7.1. Archiving your Email	54
7.2. Converting an email into a task	55
7.3. Creating a Letter	56
7.4. Searching Within Correspondence	57
7.5. Setting an Out of Office Reply for your inbox	58
<b>8. Hours/ Projects</b>	<b>60</b>

8.1. Various Hours .....	64
8.2. Projects .....	66
8.3. Project Billing .....	70
<b>9. Events .....</b>	<b>72</b>
9.1. Creating an event .....	73
9.2. Adding invitees to an event .....	74
9.3. Participants .....	75
<b>10. Administration Component .....</b>	<b>76</b>
<b>11. Company Settings .....</b>	<b>77</b>
11.1. System .....	78
11.2. Project .....	80
11.3. Contact Management .....	81
11.4. Legal .....	82
11.5. Calendar .....	83
11.6. Tasks .....	85
11.7. Correspondence .....	87
11.8. Hours .....	88
11.9. Templates .....	90
11.10. Billing .....	91
11.11. Intranet Portal .....	92
11.12. Administration .....	93
11.13. Personal Settings .....	94
11.14. Email .....	95
11.15. Workflows .....	96
<b>12. Personal Settings .....</b>	<b>101</b>
12.1. Personal .....	102
12.2. Rolodex Management .....	103
12.3. Calendar .....	104
12.4. Tasks .....	105
12.5. Hours .....	106
12.6. Email .....	107
<b>13. Templates .....</b>	<b>108</b>
13.1. Predefined Fields and Links .....	109
13.2. HTML Templates .....	110
13.3. RTF Templates .....	112
13.4. Template Code Examples .....	114
<b>14. Configuring Microsoft Office Online (requires update) .....</b>	<b>126</b>

# 1. Getting started

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This chapter contains the most important matters in regards to the use of BaseNet.

This chapter mainly serves a means to provide an all-round perspective of the BaseNet environment and to offer tips and know-hows on getting started.

Getting started:

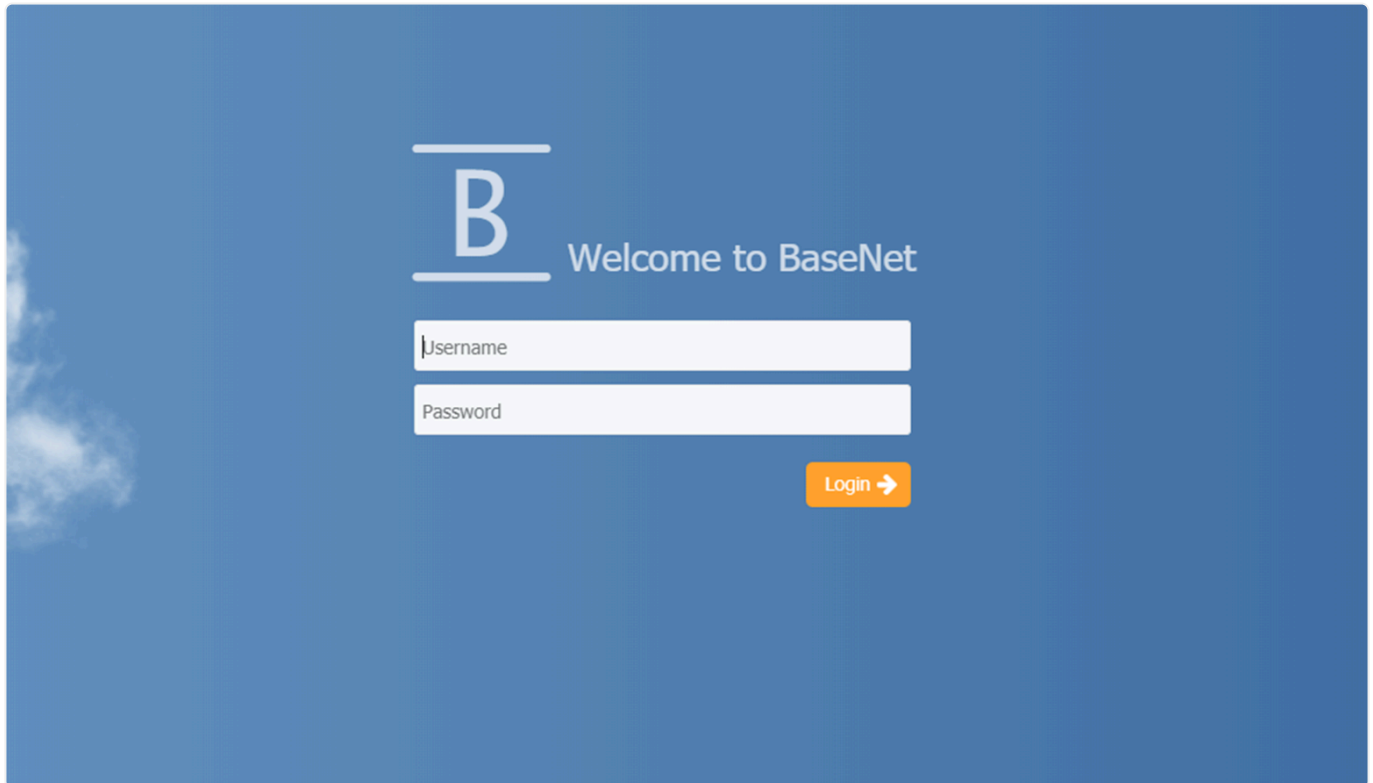
Here you find a hands on approach for a direct and effective start in BaseNet.

Moreover, BaseNet contains all the essential tools, such as pointers, do's and don't's as BaseNet constantly relies on these interactions.

# 1.1. Logging In

---

To start using BaseNet, you should perform the following steps:



1. Navigate to 'crm.basenet.nl': <https://crm.basenet.nl>.
2. Enter your six digit login code and your password.
3. Press the Enter key or click on 'Login'

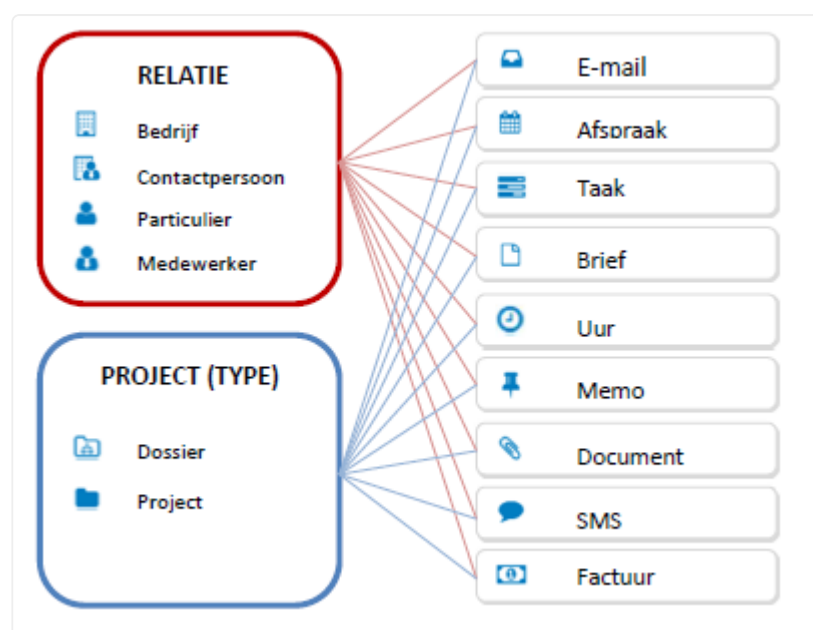
**!** **ATTENTION:** BaseNet employees will **NEVER** ask for your password. They may only ask for your six digit login code / username.

## 1.2. System Structure

### System structure

BaseNet is made of extensive 'Cloud-software' which runs to structure daily tasks such as email, documents (DMS), billing, calendar, tasks, etc. into digital items. Moreover, the projects (or matters) and the contracts which are linked to previously mentioned tasks are used as a main reference point of the entire information architecture

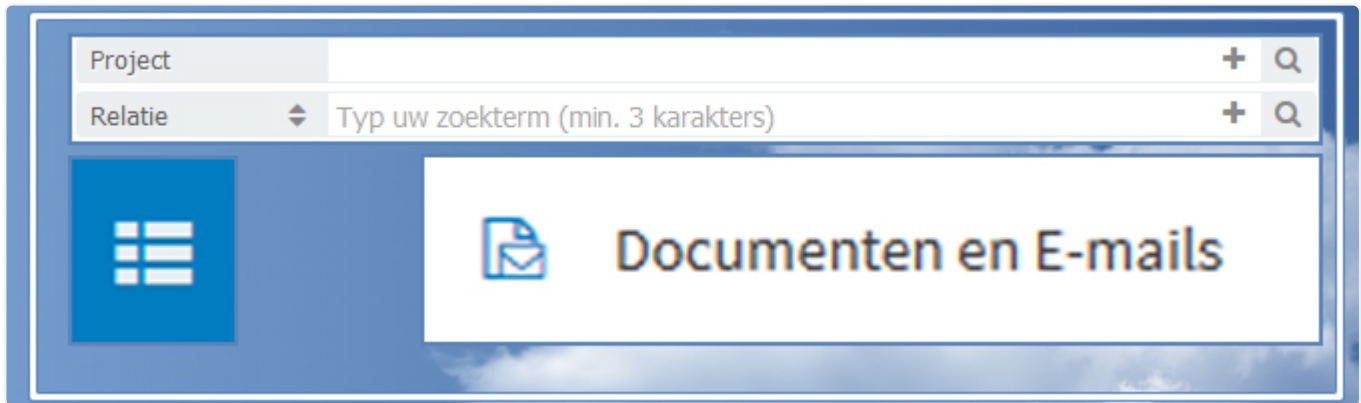
In BaseNet your contacts (such as clients, counterparties, suppliers, etc.) are a central reference point. Elements of the system such as email, appointments, tasks or clocked hours, as shown in the image below, are linked to relevant contacts, in combination with a relevant project, or matter.



## 1.3. The 5 Pillars of BaseNet

---

Throughout the BaseNet environment you will repeatedly run into certain components which have been compiled in the actions-menu consisting of BaseNet's 5 pillars. These pillars of interaction with BaseNet are helpful for quick tasks and easy to access in our cloud-based software, regardless of which component of BaseNet you are using.



The five pillars of BaseNet are:

1. The link field for projects
2. The link field for contacts
3. The '+' button within those link fields
4. The three underscores
5. Documents and Emails

### Linking projects and relations

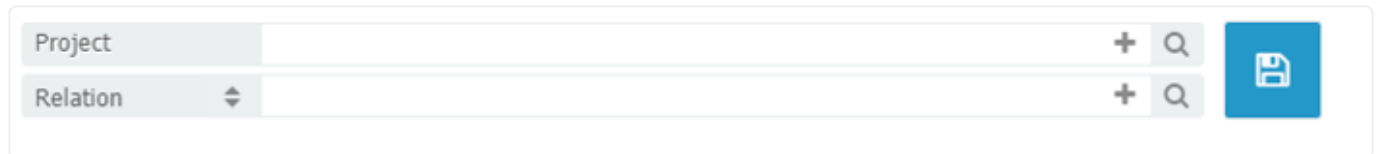
At first, you will often run into the link fields for 'projects' and 'relations'. In these fields you specify which aspect of your work you wish to link. Even if the relevant project or contact does not yet exist in BaseNet, you can create those from within the same screen by using the '+' button.

By remembering and using the following five pillars of BaseNet, you will be able to swiftly work within the BaseNet environment.

# 1.4. Linking in BaseNet

## h2. Linking projects and relations

The example bellow shows an example of a search- and link field for projects and relations.



The screenshot shows a user interface with two rows. The first row is labeled 'Project' and the second row is labeled 'Relation'. Each row has a search field with a magnifying glass icon, a '+' button, and a save button (floppy disk icon). The 'Relation' row also has a dropdown arrow next to its label.

The operation of this field consists of main BaseNet structures, which are also used for matters / projects.

1. Field name in BaseNet, for example the field for projects, contacts
2. Search field
3. A [+] button to create a new item
4. Magnifying glass for more defined search

### Linking a project (matter)

Initially the 'project' field will be mainly used for matters. From within this field all project types (including matters) can be found.

In the project specify a segment of the name which you seek to search for. In the example shown bellow a search is being performed for the name "Rachael". Considering the fact that there are several different possible spellings for that name, as a safety precaution "Rach" is being searched.

The system subsequently displays the found projects, or matters. Select the preferred matter by clicking on it (or by using the arrow keys of your keyboard and then pressing the Enter key).

The project which has been linked will be shown as followed:

### Linking a contact

The required steps for linking a contact are identical those for linking a project. Therefore, the user will be required to search for aspects of a name, and select the relevant search result.

In the example shown below, a search for a contact Joseph Grant from the firm, Grant Solicitors Ltd, is being performed.

For the search, the keyword 'Grant' has been entered, followed by the Tab key or Enter key.

The system will subsequently show the found contacts.

In case of contacts, a selection has to be made between the contact types beforehand. Therefore, when a new contact needs to be created, the 'contact' should first be selected and then the [+] button can be clicked to create the contact, in this case, an individual.

A more defined search by means of the magnifying glass

When the regular search option does not provide the desired results, a more defined search can be performed by means of the magnifying glass. In this case, the search screen for the project or contact will open (in this case, you will also need to first select the contact type)



## Specified searching

There is also the option of a specified search to narrow the search results. To achieve this, the contact type (Company, Individual, Private person, or Employee) should be specified in advance. The default setting is 'contact' and would search throughout the system for all contact types.

In this case, in the type field, we choose 'Contact for individual' (other contact types will now no longer be shown in the search results, thus leading to a narrower and more specified search, and increasing the chances that the most relevant results appear at the top of the search results).

## The "Wildcard" – %

If you only know a part of the name or company name, you can use the so called "Wildcard", withing BaseNet the "Wildcard" is defined by a "%" percent sign. When using the wildcard, the system will complete the rest of the search field itself, and thus search for the data which contains any part of the keyword.

For instance: If you know that the company name which you are trying to search for contains the suffix 'mans', then you can search for "%land". When applying this method, all results containing "land" will be shown, even those which might not be relevant. In this way, you might find a company named "Kirkland & Ellis".

BaseNet is set in such a way that contacts which are often used will appear higher in search results, thus resulting in a more efficient outcome of your search results.

## Date fields


In BaseNet, there are several ways of entering date fields. Firstly and primarily, you have the option to click the calendar button next to the date field to select a date. In addition, there is the option to manually enter dates such as '01-01-2020' or even without using dashes '01012020'.

If you wish to calculate between future and past dates you can use the following values: +1d for one day from today or -1d for one day ago respectively. You can use any digit to calculate several days into the future or past. There is also the option of calculating the following values for longer time spans: +1w for one week from today or -1w for one week ago respectively. There is even the option of calculating greater timespans: +1m for one month from today or -1m for one month ago respectively. Finally there is the option for calculating years exactly from the present day: +1y for one year from today and -1y for one year ago from the present day respectively.


## 1.5. Tips & Tricks

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### Creating a new project or contact

By using  a direct contact or project can be created. Always search for the contact or project before to see if one already exists before creating one, preventing duplicates.

**Defined searches by way of the magnifying glass** When the default search functionality does not provide the preferred results, a more thorough search can be initiated by using the magnifying glass

 . This way the more in-depth search can be opened for projects or contacts.



#### Title

N.B. When making proper use of BaseNet, the magnifying glass is seldom required

# 1.6. Search Screens

## h2. Searching

All search screens in BaseNet uphold the same structure, which consists of the following components.

1. Search field: field to enter key words to search for.
2. Filters: to filter for example based on date, status or contact.
3. Grid: table in which the search results are displayed.
4. Actions menu: this can be used to perform common tasks.

Documents and Emails

Filters

Handled by

Project

Relation

Date

Type

Department

Access

Status

E-mail with attachment

Date

Document type

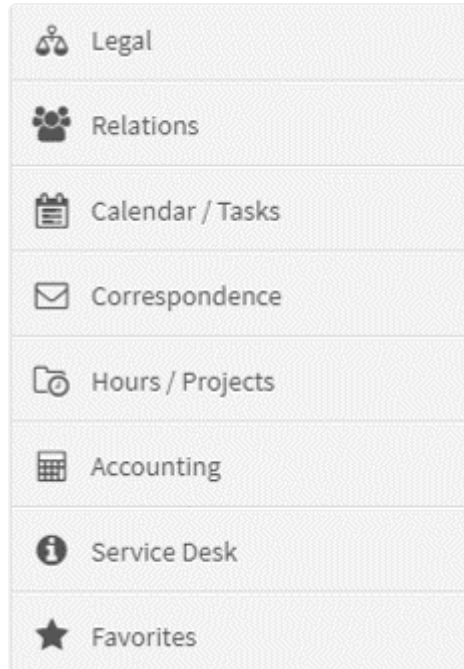
Content (fulltext search)

☐
Type
Date
Subject
Relation
Project
Employee
From

## 1.7. Main Menu

---

The main menu of BaseNet's online CRM consists of the following components:



### The main menu

The main menu of BaseNet's online CRM consists of the following components:

- \*Legal: Here you find options in regards to matters, role administration, matter billing.
- \*Relations: Here you can manage contacts such as individuals, private persons and other kinds of contacts.
- \*Calendar/ tasks: In this section, you can manage the calendar and accessing tasks.
- \*Correspondence: Archived correspondence, email inboxes, mailings/ newsletters.
- \*Hours/ Projects: Clocking hours, intern projects.
- \*Accounting: Billing, bookkeeping, reporting.
- \*Service desk: The service desk menu contains support related items.
- \*Favorites: This menu allows you to add your own favourite menu options to easily keep at hand.



**Remember: The main menu can differ based on which services you acquire.**

## 1.8. Security Explanation

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For reasons appertaining to the safeguarding of our system's security, it is not possible to answer all questions in regards to security. We aim to keep our website as elaborate and clear as possible in order to provide information on the measures which we take to safeguard security to our customers.

Due to security reasons this is the only information which we are able to provide. The elaboration is accessible through the page below.

[Click here to visit the webpage](#)

## 2. Do's and Don'ts

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Requirements for optimal use of our system.

## 2.1. Do's

---

### 1. Always link a contact.

When the contact has been linked (with an email, task, etc.) it will become accessible for everyone and keep the contact history complete. There is never a (good) reason to not link a contact.

If the Rolodex card for the contact in question does not exist, a new Rolodex card can be created by way of the [+] button so that the contact can subsequently be linked.

### 2. Always link the project.

The same rule applies here as with the contact. It may be the case under rare circumstances that the project is not relevant.

### 3. Always first search for the contact or the project before creating one.

Pollution is not a result of having too many contacts or projects, but rather having duplicates or incomplete/ incorrect information. Therefore prevent having duplicates by always first searching a contact or project to see if a colleague has not already created one.

### 4. Archive everything within two weeks.

Emails have to be archived as soon as possible. If a particular action is required within that time span you can opt to leave the email for now. This should not take longer than two weeks, or else a task should be made to archive the email.

### 5. Creating tasks.

If a particular action in regards to an email is required, if there is a callback request, or if certain items have to be proof read, or any other task which come to mind, make sure to create a task for those actions.

Creating a task for such actions has additional benefits, such as:

#Colleague's would have insight into your tasks in case of your absence and if necessary continue your work.

#The history is easily accessible.

#There is insight on tasks that have been performed in the past which are related to a particular case.

#You will receive a reminder as soon as the task needs to be completed and thus making it easier to remember.

## 2.2. Dont's

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### 1. When searching/ linking the magnifying is seldom necessary.

Practically everything is accessible through the search field. In case of too many results or when searching for deactivated contacts or projects the magnifying glass is required.

### 2. Never manually type the Email address in the 'To' field.

When applying these methods a contact is never linked to an Email. When a contact is linked, the Email address is automatically filled in the 'To' field.

### 3. Always remove the Email from the inbox when archiving.

When archiving an Email, the Email is automatically removed from the mailbox, otherwise the Email ends up in both the mailbox as well as the archive. This can cause confusion, pollution and repetitive actions.



This is especially important for smartphone users. Emails sent from a mobile device are placed in the Sent folder with the purpose to archive them afterwards.

### 4. Do not create maps.

Mailboxes contain 'Concepts', 'Sent', 'Spam', and 'Trash' in the form of folders by default. Other maps are not necessary as this leads items to stay unarchived for too long and Emails to not be answered. For an efficient work process within the system, answered Emails should be archived.

Contrary to Microsoft Outlook and similar interfaces where the entire Mailbox is seen as one big archive, BaseNet uses the "Documents and Emails" component, which can be found under "Correspondence".

### 5. Do not automatically load your default Email template (personal setting).

When in regards to composing an Email, a template is set to appear automatically, whereas the contact and/ or project will not be automatically linked and added as an addressee, because that step has been skipped. In addition, this makes choosing a different template much more tedious. Manually loading a template is done in a matter of a single click.

### 6. Do not conceal too much in regards to credentials/ accessibility rights.

Credentials should be set with projects in mind. Everything that is linked to a project, receives that relevant credential/ accessibility right.

In regards to credentials/ accessibility rights, everything should initially be set to "All" so that the contact and project history is completely viewable by all.



## 3. Legal

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In this chapter we shall touch upon the 'Legal' component.

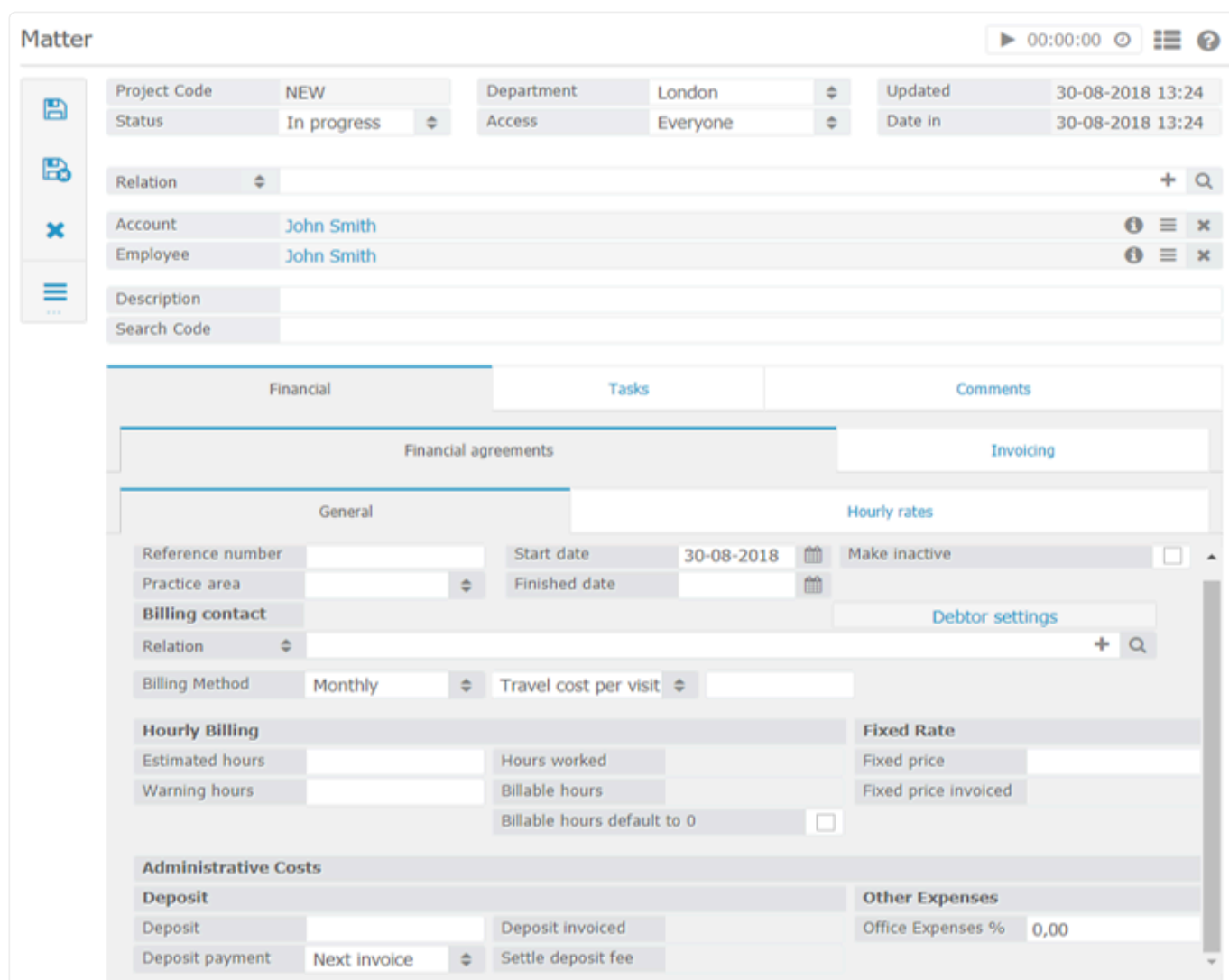
## 3.1. Legal Files

Legal files are, along with contacts, a central reference point within BaseNet. Legal files are used to link correspondence, legal file information and financial information for a client.

### Creating a legal file

Legal ► legal files

Click on  to display the screen below:



**Matter**

00:00:00

Project Code: NEW, Status: In progress, Department: London, Access: Everyone, Updated: 30-08-2018 13:24, Date in: 30-08-2018 13:24

Relation: +

Account: John Smith, Employee: John Smith

Description: , Search Code:

**Financial** | Tasks | Comments

Financial agreements | Invoicing

General | Hourly rates

Reference number: , Start date: 30-08-2018, Practice area: , Finished date: , Make inactive: ☐

Billing contact: , Debtor settings: +

Relation: +

Billing Method: Monthly, Travel cost per visit:

**Hourly Billing**

Estimated hours: , Warning hours: , Hours worked: , Billable hours: , Billable hours default to 0: ☐

**Fixed Rate**

Fixed price: , Fixed price invoiced:

**Administrative Costs**

Deposit: , Deposit payment: Next invoice, Deposit invoiced: , Settle deposit fee:

**Other Expenses**

Office Expenses %: 0,00

In the main section of the legal file screen, solicitors and contacts can be filled in. Here you can enter your contacts (an individual, a company or a private person). Moreover, you can add an assigned and responsible solicitor. The latter should always be one from your law firm.

It is possible to create contacts whilst filing a or linking an existing contact.

To add a new contact, simply click on the [+] symbol (next to the magnifying glass symbol).

Subsequently, a new screen will be opened, where you can enter the information related to the contact. To save your actions, click on save.

In the General tab, you can set the field of law. This list can be extended if you have the required credentials:

**company settings > Law > Field of law**

**Comments Tab >** In the 'comments' tab a short description can be added to the matter. Under the "alert comments", important comments can be added. For example "beware: a new advanced payment is expected"

## Setting a rate per hour >

✿ Please keep the following in mind for a proper use of rates per hour.

There are four levels of rates per hour:

1. Employee wage per matter
2. General rate per matter
3. Employee rate
4. Office rate

The system first checks whether 'Level1' has been entered, if so, that rate is applied. When no rate has been entered to the system then check whether a rate has been entered in the following next level. If you have the proper credentials appertaining to company settings, you are able to make changes to the wages appertaining to level 3 and 4. In order to do so, follow these steps:

**Settings > Companysettings > Hours, and subsequently go to 'Standard rate per hour' (level4) or "rate per hour per employee" (level3).**

Under the **Finances > Hours/Rates** you will have the option of setting a rate per hour based on a matter (default rate, level 2). You can also set a rate per employee by using the New button (level1). Beware: If the tab is left completely empty, the system automatically applies the default office rate which was specified in the central settings.

**Fixed price >** The amount entered in this field will be taken into account when billing. No **hours** will be billed. Additional expenditures and office expenditures (if applicable) **will** be taken into account.

**Office expenditures >** In the office expenditures field the office expenditures can be specified per individual dossier. If you have access to the company settings you have the ability to set a standard percentage regarding office expenditures. A different rate from the default rate for the dossier is of course possible.

**Retainer >** If you would like to work based on a retainer you can add the amount in the retainer field.

In the first billing that you create the retainer amount will be included. When creating a second billing the system will automatically take the retainer into account. The fields “retainer billed” and “retainer reimbursed” directly show what, and how much has been taken into account when billing retainers.

**Travel expenses** ➤ If you would like to include travel expenses you can opt for:

\*Travel expenses per visit

\*A rate per distance

The travel expenses per visit can be entered per matter or through Settings on company settings. The distance rate can only be set per matter. When entering your hours, do not forget to set the “travel expenses” field on “yes” in order to include the travel expenses. When working based on a distance rate (per kilometer/mile) and entering hours, you should keep in mind that the distance also needs to be entered. For further information, please see the screenshot below:

The screenshot shows the 'Uren' (Hours) entry interface. At the top, there's a header 'Uren' with icons for list, print, and help. Below this, a sidebar on the left contains icons for saving, deleting, and adding records. The main form area includes:

- Medewerker:** Arnoud Veen (with info, menu, and close icons)
- Tijdschrijfg.** (Time recording)
- Werkzaamh...** a4 Bespreking intern (with dropdown arrow)
- Tijd gewerkt:** 00:10:19 (12 minuten) (with pause icon)
- Datum:** 29-10-2015 (with calendar icon)
- Tijdstap:** 3 min. **Minimale tijd:** 6 min.
- Uren fact.** and **Uren besteed** (tabs)
- Kilometers** (input field)
- Project** (input field with search icon)
- Opmerkingen** (Remarks) and **Overig** (Other) tabs

“Other” tab:

Under the “other” tab, custom fields can be created which are missing in BaseNet. For entering these fields the actual (company settings) credentials are required.

**Go to: Company settings ➤ Legal ➤ Matter settings, to create the fields.**

**Splitting invoices** ➤ Through the “split invoice” tab, which can be found under the “financial agreements” tab, you can split invoices. There are two ways of splitting invoices:

- Splitting based on percentage
- Splitting based on set rates/ amounts

When 'Splitting based on percentage' a percentage can be entered which the system will subsequently use for dividing the to be paid amounts which are to be billed.

The "set rates/ amounts" option is linked to the 'Fixed fee' field. When such a division takes place, you should keep this field into account. By clicking the 'remainder' field the system will automatically fill in the difference between the 'Fixed fee' and the first set division.

Legal ▶ Role administration

✿ To make optimal use of role administration within BaseNet's online CRM it is essential to follow the following steps:

Settings > Company settings > Legal > Role administration

When performing regular actions, calendar, events and tasks can be linked to these actions.

## Performing an action appertaining to role administration

Click on 'New' A new window appears in which various data can be entered:

Rolcode

NEW

Status

NVT

Laatst bijgew.

Dossier

Medewerker

Typ uw zoekterm (min. 3 karakters)

Datum in

29-10-2015

Rechtbank

Relatie

Rolnummer

Actiedatum

Rolreferentie

Handeling

Stukken controleren

Opmerkingen

B

I

U

☰

☷

A ▾

Let... ▾

🔄

📎

**Matter**

Here you can link a matter. The action appertaining to role administration is directly linked to the matter and is therefore also accessible from the matter screen.

**Role number**

Here you can enter the role number.

**Court**

Here you can specify a court by selecting one.

**Role reference**

Here you can enter the reference code.

**Actions**

Here you can select an action which you have made in the company settings. By entering the date, you can automatically create a calendar event and subsequent tasks.

## 3.3. Matter Billing

Through the “Matter billing” screen you can send invoices appertaining to matters. Matters are only shown in this search screen when billing an item is applicable. It is important to note that your matters should have the genuine status so that they are easily referable. Pay good attention which status(es) you search for in this search screen.

Matter billing

Filters

Assigned Solicit

Relation

Matter Status

Hours

Exclude hours

Charged

Exclude charges

Department

Active / Inactive

Billing Method

Extra filter


Practice area

Only settle with advance fee

Through the “Hours until.” field and “Additional costs until.” you can easily filter based on hours and additional costs until the desired date/ time span. This could be useful when, for example, you wish to send invoices appertaining to hours and additional expenses spanning until a certain period or date.

p(banner tip. When there are additional expenditures present and you wish to only include hours in an invoice, you can check the “Exclude additional costs” box. This way, the additional costs are not included. Of course this option is also possible the other way round, when you only wish to invoice additional costs.

\* There is the option to export an overview of an invoice before sending it out. In order to do this, go to the concerning matter and hold the cursor above the printer icon in the right top corner of the screen. Now select the rapport “rtf OHW contact project” to export as a Word document containing the hours and additional costs that should be invoiced.

Click on  to see a list of billable matters which can be invoiced. In the list you will find what has not yet been completed in regards to hours, additional costs, retainers, fixed rates and additions.

If you wish to make adjustments to the hours, you can easily do this by way of clicking “open hours” from the list. A new window opens listing the hours which are ready for billing/ invoice. At this point, you still have the option to make adjustments to descriptions, etc. If you would like to make adjustments related



to other matters such as retainers, fixed prices, additional costs or additions, you can double click on the matter.

At this point the invoices are still individually adjustable. This can be done by clicking the “Open invoice” link:” followed by the created invoice number. A new window will appear as shown below:

**Uitgaande Factuur**

Factuurnummer	100108100	Administratie	Administratie	Datum in	27-11-2017
Ordernummer		Status	Wacht	Laatste wijziging	27-11-2017 15:44
Verzenddatum		Boekjaar	2017	Dagboek	Verkoopboek te
Vervaldatum		Periode	11	Projectverw	Verwerk project
Factuur voor	Bedrijf	Basenet Internet Projects			
Factuur naar	Bedrijf	Basenet Internet Projects			
Betaalwijze	Via bank	IBAN-nummer	Debiteurstellingen		
Verzendwijze	Per post	Fact. e-mailadres			
Project: Basenet Internet Projects / Handleiding (D20180023)					

Factuurregels	Referentie Overige	Financiële info / Extra	Online betalingen	FlexData	Foto
---------------	--------------------	-------------------------	-------------------	----------	------

Totaal excl.	881,00	BTW	166,95	Totaal incl	1.047,95
--------------	--------	-----	--------	-------------	----------


<input type="checkbox"/> Omschrijving	Tot. excl.	Tot. incl.	# pr p/s BTW	Produkt/Grootbo
<input type="checkbox"/> griffierecht	86,00	86,00	1 * 86,00 NVT	100014 Onbelaste ve 2040 Onbelaste versc
<input type="checkbox"/> Urendeclaratie t/m 27-11-2017	750,00	907,50	1 * 750,00 V 21%	100000 Honorarium 8000 Omzet honorari
<input type="checkbox"/> Kantoorkosten 6,00% van € 750,-	45,00	54,45	1 * 45,00 V 21%	100001 Kantoorkoste 8050 Omzet kantoork

The invoice is still manually amendable in this screen. Additional values can also be added.

After proof reading you can create the invoices. This can be done by checking the box next to the

concerning matters from the list and subsequently clicking the  invoices button.

The invoices will now be created and after completion a new window will appear saying that a X amount of invoices have been created. This window only serves as a confirmation and to check your actions.

To print the invoices after it has been created, click on the  button. The screen below will be shown subsequently.

## Printen en verwerken van facturen

Verwerking van 7 facturen.

Bij het verwerken zal bij alle facturen onderstaande verzenddatum en boekperiode worden ingevuld.  
Indien niet gewenst dient u de verzenddatum en boekperiode in dit venster te wissen. Reeds ingevulde verzenddata en boekperiodes blijven dan onveranderd.

Extra factuur informatie wordt toegevoegd aan bestaande info

Factuur verzenddatum 29-10-2015 


Boekjaar 2015 Periode 10

[Print](#) [Verwerk Facturen](#) [Sluit scherm](#)

The text field provides the option to specify a text which will be added to all printouts. The information that has been entered in 'Invoice send date', 'Billing year' and 'Period', will be applied in the invoice during the processing.

Click on [Print](#) to print out the invoices.

If all invoices are correct, it is time to process the invoices. By doing so the invoices which have just been created will receive "Billed" status and will be laid through to your administration.

For this purpose, you should once again check and mark all the matters and click the  [Process Invoices](#) button to process the invoices.

**!** Invoices are NO LONGER adjustable after processing them. Only use the process button if you are confident that all invoices are correct.

// This process is NOT reversible.

To make incidental revisions to an invoice, the invoice has to be credited.

You have now created the invoices. The matters will no longer be listed unless hours or costs have been billed towards it.


## 3.4. Input Examples


### 3.1. Input examples

In this page you will find a series of examples of billing from within matters.

#### Example 2.1. Retainer invoice

Open the tabs from within the matter as shown below.

In the 'Retainer' field add the amount of which you wish to add to a billing. Now click on 

Now select the tabs as specified in the image bellow. Subsequently click on . The system shall now create an invoice containing the specified retainer.

Open the invoice by double clicking on the field which has now appeared. Within the newly opened window click on “Print invoice”. Please note that, if the invoice is correct and sent, the invoice is now processed. To do so click on the Process button. The illustration shown bellow can be used for reference.

When you have clicked on **Process and Print/Open E-mail** from within the actions menu on the left side of the screen, the invoice will be irreversibly created and no longer changeable. The listed retainer will

be shown in the first following invoice. If you would like to postpone this until the matter is completely ready, you can set this via: **Settings (Company) ► Billing/ Invoice ► Invoice settings ► Retainer to be billed**. Here you can choose whether you would like to take the retainer into account for the first following invoice/ billing cycle or whether you wish to do so when the matter status changes to 'Ready'.

## Example 2.2. Fixed rate billing

In the matter, open the tabs as shown below.

The screenshot displays the 'Financieel' tab in the BaseNet interface. The top navigation bar includes tabs: Algemeen, Opmerkingen, KlantenIntranet, Subdossiers, Overige Relaties, **Financieel**, Roladministratie, Taken, Kenmerken, and Historie. Below this, the 'Financiële afspraken' section is active, showing sub-tabs: Financieel algemeen, **Factuursplitsing**, Uurtarieven, and Toevoeging. The 'Factuurrelatie' section is expanded, showing details for 'Piet Jansen' (Particulier). The 'Debiteurstellingen' button is visible. The 'Wijze facturering' is set to 'Maandelijks'. The 'Kantoorkosten %' is 6,00, and 'Reisk. per bezoe' is 0,00. The 'Fixed price' is 1.000,00, and 'Fixed price gefact.' is 0.00. The 'Max. uren' is 0,00, and 'Max. uren gefact.' is 0.00. The 'Voorschot' is 0,00, and 'Voorschot gefact.' is 0.00. The 'Verreken voorsch.' is set to 'Volgende factuur', and 'Voorschot verrek.' is 0.00. The 'Waarschuwing uren' is empty, and 'Bestede uren' is 0,00. The 'Factureerbare uren' is 0,00. The 'Uren fact. standaard op 0' checkbox is unchecked, and 'OHW percentage' is 80,00.

In the 'Fixed price' specify the amount which you would like to include into a billing. Now click on 

Now select the tabs as shown in the image bellow. Subsequently click on **Invoicing**. The system will create an invoice containing the fixed rate/ price.

Algemeen	Opmerkingen	KlantenIntranet	Subdossiers	Overige Relaties	<b>Financieel</b>	Roladministratie	Taken	Kenmerken	Historie
----------	-------------	-----------------	-------------	------------------	-------------------	------------------	-------	-----------	----------

Financiële afspraken

Facturen

Factuurregels

Facturen

<input type="checkbox"/>	Fact./Ordernr	Status	Bedragen / Herinneringen	Betalingen /Afboek.	Relatie
<input type="checkbox"/>	<b>100097</b>		Te factureren: 1.282,60 Originele bedrag: 1.282,60 Open bedrag: <b>1.282,60</b>  Herinneringen: <b>0</b>		<b>mr. P. Jansen</b> Straatnaam 1 a Twee hoog 1234 AB HAARLEM België

Open the invoice by double clicking on the field which has now appeared newly. In the new window

move your cursor towards and opt for **Process and print** or **Process and open Email**.

Beware that when you have clicked on **Process and print** or **Process and open email** the invoice will become irreversible and can no longer be subject to adjustment.

✿ If you wish to once again bill a fixed price in a matter, it is first necessary to raise amount in the fixed rate field to the amount which you wish to bill.  
If you wish for the matter to continue as a matter based on rate per hour (meaning that after the fixed rate, the fee will be taken into account) the fixed rate field should be set to 0.

## Example 2.3. Disbursements

Open the tabs from within the matter, as shown below.

In the field type 'Prod/Art.' '%disbursement '. By using the % sign you are searching for all items which include 'disbursement' in its name. After this, click on tab. You will now be given the choice between taxed and non-taxed disbursements. This might depend on the settings in regards to foreign invoices, Foreign disbursements within the E.U. and disbursements outside the E.U., as shown in the illustration below.

Algemeen Opmerkingen KlantenIntranet Subdossiers Overige Relaties **Financieel** Roladministratie Taken

Financiële afspraken Facturen

Factuurregels Facturen

Product/Art. + Q Aantal 1,00  
Omschrijving Prijs 0,00  
Factureerbaar vanaf 19-05-2021

<input type="checkbox"/>	Omschrijving	Pr. Excl.	Status	Factuur	Pr Incl.	Aantal	Pr. p/s
--------------------------	--------------	-----------	--------	---------	----------	--------	---------

Pr. Excl. Gefactureerd Te factureren

Select one of the items, add a desired description and price. Now click on the Add button.

A new invoice field will now be added. This can be billed by going to the Invoice tab and clicking on the Billing button.

Algemeen Opmerkingen KlantenIntranet Subdossiers Overige Relaties **Financieel** Roladministratie Taken

Financiële afspraken Facturen

Factuurregels Facturen

Product/Art. + Q Aantal 1  
Omschrijving Prijs 0,00  
Factureerbaar vanaf 19-05-2021

<input type="checkbox"/>	Omschrijving	Pr. Excl.	Status	Factuur	Pr Incl.	Aantal	Pr. p/s
<input type="checkbox"/>	Griffierecht	100,00	Factureerbaar vanaf 19-05-2021		100,00	1,00	100,00

Pr. Excl. 100,00 Gefactureerd 0,00 Te factureren 100,00

#### Example 2.4. Additional billing case

From within the matter, open the tabs as shown below.

Algemeen	Opmerkingen	KlantenIntranet	Subdossiers	Overige Relaties	Financieel	Roladministratie	Taken	Kenmerken	Historie
----------	-------------	-----------------	-------------	------------------	------------	------------------	-------	-----------	----------

Financiële afspraken

Facturen

Financieel algemeen	Factuursplitsing	Uurtarieven	Toevoeging
---------------------	------------------	-------------	------------

Raad voor Rechtsbijstand

Raad voor Rechtsbijstand

Toevoegingsnummer

Datum aanvraag

Toevoegingspunten

Datum toekenning

Basisbedrag

0,00

Reistijdvergoeding

0,00

Reiskostenvergoeding

0,00

Vaste kosten vergoeding

0,00

Totaal gefactureerd

Eigen bijdrage

122,00

Eigen bijdrage gefactureerd

0,00

Verg. kosten rechtsbijstand

0,00

Toevoeging gaat door als urendossier

☐

Extra toevoeging

RvR aanvraag

Link the contact of the Legal Aid Board in the field with the same name. Only then the system will recognise the matter as an additional case. Now enter the amount which you wish to bill to your client in the 'own contribution' field and click on [Save](#)

Now select the tabs as indicated in the illustration below. Subsequently click on Billing. The system will generate an invoice containing the 'own contribution'. If the invoice correctly shows the intended information you can print and process the invoice by using the Print and Generate button.

When you have received the determined compensation from the Legal Aid Board you can specify which compensation you will receive through the 'Add' tab. The illustration below shows which fields you can use for this purpose.

Now go to the 'Invoices' tab and click on 'Billing'. There you can click on the 'Print and Generate' button to generate the invoice and subsequently print it.

## Example 2.5. Invoice division

Open the tabs from within the matter as indicated below.

In 'Division' indicate whether you would like to divide the item to be invoiced bill by way of percentage or through fixed prices.

If you wish to bill a division by way of fixed prices you may bill the first contact a fixed price and the other contact the remainder of the bill by check marking the "Remainder" box.

See above examples for billing.



## 4. Collection component

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## 4.1. Importing collection files

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## **4.2. Working from within the search screen with collection files**

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## **4.3. Creating a payment arrangement**

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## **4.4. Customer's received payments from counter party**

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## 4.5. Subpoena

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## 5. Contact management

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The contact management (Rolodex) is a central reference point in BaseNet: all components such as calendar events, Emails, tasks and projects are directly accessible through your contacts.

When linking one of these components you also create or expand the contact's history.

## 5.1. Creating a New Contact

In this chapter, we will touch upon how to create a contact.

Creating a contact in the form of a private person

Go to **contact management** ► **private persons**

Click on New, after which the following screen appears, as shown below:

For optimal use of BaseNet create the contact card as elaborately as possible by filling in all relevant fields



BaseNet makes use of a postcode search tool. By entering the postcode and street number followed by clicking on the blue magnifying glass to have the remainder of the address information automatically completed.

If the company information of the private person have already been entered into BaseNet the concerning company address can be copied by linking the company with the private person.

The 'Other' lets you enter personal information appertaining to the private person such as National insurance number, date of birth, citizenship, etc.

The 'Partner' tab lets you link the private person's partner. If the private person has not yet been entered in BaseNet, a new private person contact can be created from this same 'Partner' tab. To do so, click on 'New Partner'.



## Creating a contact in the form of a company

When clicking on new, a window appears as shown below.

Fill in all fields. By clicking the 'Search address with postcode and street number' button, the system will automatically fill in the street and city. Please make sure to check the 'Other' tab to select a default title for the addressee and the 'private person contact' button to add any private persons if applicable. To add the

contact to the Rolodex click on Save, this generates the contact in the system.

## Creating a contact in the form of a private person

Company settings ► Private Person

There are several ways of creating a contact in the form of a private person. Contacts can be created either directly within a company contact, through the contacts field, or through the short cut drop-down menu.

## Creating a contact in the form of an individual



It is possible to create a new contact in the form of a company during the same process of creating a contact in the form of a private person. Enter the company name in the field which has been circled red. As soon as you click on Save a new contact in the form of a private person is created simultaneously with a new contact in the form of a company.

Click on “actinbutton” at the top of the window and opt for “New contact in the form of a private person”. A new window now appears where you can enter the information appertaining to the contact in the form of a private person.

In this screen enter the information appertaining to Name, Address and City. The Title field (before) and Title field (after) can be used to fill in titles such as Mr., Dr. or for example (MBA). Such titles are applied when sending mailings/ newsletters.

Do not forget to enter the P.O. Box. This address is used when sending letters or mailings to the

concerning private person.



The only mandatory fields are “Surname” and “Company”.

In the center of the screen you will find the “Company” field. Here you can indicate which organisation or private person is representing the company. To link a company you can enter the company name of which a contact card has already been created and subsequently enter the “tab” key to link the company. If the company does not easily appear by way of search you can use the magnifying glass for more defined search options.

The contact can be saved by clicking the Save/ Quit button in the left top corner of the window. The contact has now been entered and generated.

## 5.2. Contact Selections and Mailings

**Contacts** ► **Contact selections.**

Contact selections serve as a means of filtering your Rolodex based on varied specific properties. After which the selection can be used for exporting an overview or using an addressee listing when composing a mailing. In this chapter, we shall touch upon the dynamics of this component through the following steps.

### Procedure 4.4. Creating a selection and mailing

Click on New, resulting a new window to appear as shown below:

The screenshot shows the 'Relatieselectie' window with the following fields and values:

- Selectie code: NEW
- Datum in: 22-12-2015 15:56
- Laatste wijziging: 22-12-2015 15:56
- Omschrijving: (empty)
- Vestiging: (empty)
- Soort Relatie: Accountmanager
- Volgorde: (empty)
- Bij partners alleen eerste meenemen: ☐
- Datum in vanaf: (empty)
- Status relaties: Alleen actief
- Type relatie: (empty)
- Functie/Beroep: (empty)
- Vrij selectie 1: (empty)
- Vrij selectie 2: (empty)
- Datum in t/m: (empty)
- Geb.datum vanaf: (empty)
- Geb.datum t/m: (empty)
- E-mailadres: (empty)
- Bedrijf: (empty)
- Plaats (post): (empty)
- Zoeknaam: (empty)
- Postcode van: (empty)
- Land: (empty)
- Naam persoon: (empty)
- Exclusief relaties status (Geen mailing): ☐
- Groep: Automatisch
- Kenmerk: Advocaat weder
- W/N: (empty)
- Kenmerknaam: (empty)
- E/O: (empty)

Within this window the criteria can be specified appertaining to what you wish to select. **Selection.** Within this field you can give the selection a name. This serves for future reference when trying to retrieve the selection for later use. **Contact type.** In this field you can differentiate within the selected contact. If you wish you may use open fields at this stage. **Starting date.** This field provides a selection of contacts which have been generated within a certain period. **Account manager.** Here the contacts of a particular employee can be selected. In order to retrieve all contacts leave this field free. **Attributes.** Here the attributes which have already been entered/ generated can be applied for a more defined selection. It is possible to combine different attributes or exclude certain attributes within a selection. For example if you wish to create a selection of all contacts which have "Christmas post card" and "Newsletter" as an attribute and not attribute "Field of interest 2" the selection should show as followed:

Kenmerken

Flexdata

Groep: KENMERKEN

Niet Kenmerk Interessegebied 2 En

	W/N	Kenmerknaam	E/O
<input type="checkbox"/>	Wel	Kerstkaart	En
<input type="checkbox"/>	Wel	Nieuwsbrief	En
<input type="checkbox"/>	Niet	Interessegebied 2	En

Alleen relaties zonder kenmerken ☐

In case of such a selection parentheses should be used. If you wish to make a selection based on several attributes without exceptions you do not have to use parentheses. For contact selections which have both the “Christmas post card” as well as the “Newsletter” attributes a selection would look as followed:

Kenmerken

Flexdata

Groep: KENMERKEN

Wel Kenmerk Kerstkaart En Wel Kenmerk Nieuwsbrief En

	W/N	Kenmerknaam	E/O
<input type="checkbox"/>	Wel	Kerstkaart	En
<input type="checkbox"/>	Wel	Nieuwsbrief	En

Alleen relaties zonder kenmerken ☐

**Proof reading the selection:** Double check the selection which you have created. Click on the Save button and subsequently on the Create Mailing button. A window appears titled ‘Show Selected Contact’ Data. This window consists of two segments. An overview of all contacts that categorize within a particular selection and tabs of which each show a type of mailing, such as Text messaging, Letter, Email, etc. Now select the type of mailing which you prefer.

E-mail Brieven SMS Etiketten Exporteer Kenmerken Evenement

**Email.** In this tab you can send customised Email mailings. To do this select a template and enter a subject.

**Letter.** Here you can select a letter template in order to make a letter mailing. **Text Messaging.** Text Messaging offers the possibility to send Text Message mailings. Additional fees will apply to this component.

**Labels.** Here you can print out labels. Select a label format and click on Print Labels to print out the Labels.

**Attributes.** Add an attribute to the selection. Click on the Attributes tab after sending a mailing to add a new attribute to the entire selection. For example, “Newsletter January 2008”, this way at a later time and juncture you can easily search to see who has received a particular mailing. The step as shown below is only applicable when sending Email newsletters, i.e. mailings.

**Inspect the status/ history of mailings.** Return to the Menu: Contact Management > Contact Selections. Here you find a “View Status/ History Email mailings” button. By way of this button, you can retrieve the status and history of mailings which have been sent out in the past.

## 5.3. Importing Contacts

---

In order to import go to Manage -> Company Settings -> System -> Import Data. Select a type of import (Companies, Contacts in the form of private contacts or Contacts in the form of individuals) and click on download to retrieve the necessary import template.

Now you can start filling in the template. The second tab within this template has the specifications (field lengths) listed in most fields. It is very important to uphold these guidelines in order to achieve a successful import.

### Procedure 4.5. Importing contacts in the form of private persons

When importing, the system allows for standardised contact codes. This functions properly as long as no contacts in the form of private persons are being imported. But if contacts (in the form of private persons) are indeed to be imported, you first have to import contacts in the form of companies.

Download the specific company import sheet and create a new column, this should be the first column. Name this column "Rcode" as a title. In this column you can now enter codes manually with the intent of importing companies. It is highly advisable to specify a numerical system bellow 100000, as this is the first digit which is entered into the system by default.

After completely filling in the Excel sheet, you should now import the companies. Do not forget to shut down the Excel sheet when importing. For a proper import go to Manage -> Company Settings -> System -> Import Data. Subsequently, select Companies in the drop down menu and click on Browse in order to select the Excel sheet. Now all that's required from you is to click on Import to initiate the import of the sheet.

At this point you can fill in the sheet for contacts in the form of private persons. The previously provided "Rcode" can now be entered in the "Company code" field. By doing this the imported contacts (in the form of private persons) are being linked to previously imported companies.

After completely filling in the Excel sheet import the contacts in the form of individual persons. Do not forget to shut down the Excel sheet when importing.

In order to be able to import go to **Adminstration > Company settings> System > Import data** Subsequently, choose contact as individual person in the drop down menu and click on Browse to move towards the entered import template. Now all that rests is to click on Import to initiate the import of the sheet.

## 5.4. Reattempting a Failed Import

---

During the import of contacts the system automatically performs a check in regards to the contents of the imported file in question. Fields which have been incorrectly added will be declined. After the import, any erroneous fields (if applicable) will be shown as displayed below:

Geïmporteerd: 9  
Niet geïmporteerd: 3

In this example someone attempted to import 76 items. As a result 75 items/ fields imported successfully and 1 item/ field was unsuccessful. By clicking the (red) link an Excel sheet will be opened containing the erroneous object(s). The first column specifies (as far as possible) why this item/ field was unsuccessfully imported. The template can subsequently be amended in order to import a second batch containing only the previously failed imported items/ fields.

Click on a field and then on Delete in order to undo an import.

! By deleting a previous import all items from that selected import vanish from the system. It is not possible to recover an import after deletion! Previous imports are automatically blocked two weeks after the initiation date of the import so that deletion is no longer possible.

## 5.5. Merging Contacts

It may occur that a contact has been entered twice and that you (even though not aware at the time) have linked clocked hours and correspondence to both contacts. This can be undone if you follow certain steps.

Go to contact management -> contact, click on the three horizontal lines and choose “merge” -> you are now asked which contact/ company’s history you wish to merge.

Relaties ontdebellen

Verwijder Bedrijf BaseNet Internet Projects

Verplaats naar Bedrijf

Gelijke relaties

Relatiecode	Bedrijf / Adres	Contact	Opmerkingen
<input type="checkbox"/> 100030	BaseNet Internet Projects WG-plein 568 1054 SJ AMSTERDAM		

If you enter a contact in the form of a private person/ or a company and subsequently check the box, the contact will be merged with the selected contact in its entirety.

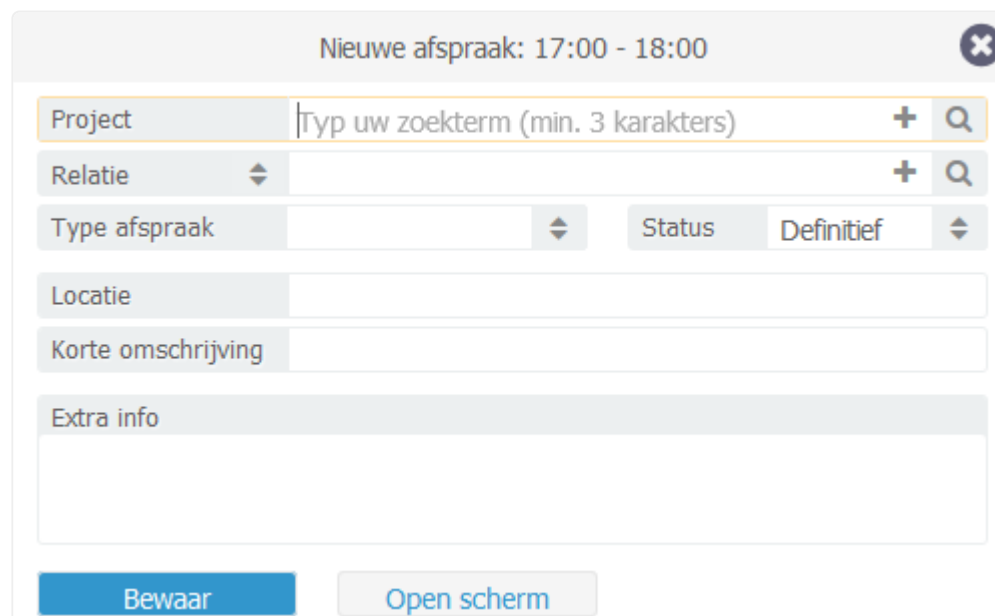
- This is only an informative notice. When clicking ‘OK’ all hours and correspondence will be added to the selected contact.
- Make a selection of two company contacts and click Merge. The following window will appear:



## 6. Calendar and Tasks

### Creating calendar events

To create a calendar events go to: Calendar / Tasks -> Calendar. Select a time and double click, after which the following screen will open:



The screenshot shows a web form titled "Nieuwe afspraak: 17:00 - 18:00" with a close button (X) in the top right corner. The form contains several input fields and buttons:

- Project**: A text input field with a placeholder "Typ uw zoekterm (min. 3 karakters)" and a search icon (magnifying glass) and a plus sign (+).
- Relatie**: A dropdown menu with a plus sign (+) and a search icon (magnifying glass).
- Type afspraak**: A dropdown menu.
- Status**: A dropdown menu with the value "Definitief" selected.
- Locatie**: A text input field.
- Korte omschrijving**: A text input field.
- Extra info**: A larger text input area.
- Bewaar**: A blue button to save the appointment.
- Open scherm**: A button with blue text to open the calendar screen.

This window is intended to swiftly enter a new calendar event. The project and/ or contact can be linked to a calendar event. By doing so the calendar event becomes visible from the user account of the contact and/ or by accessing the project, if linked.

## Agendapunt

---

Medewerker
Arnoud Veen

Datum/tijd van 22-12-2015 17:00

tot 22-12-2015 18:00

De hele dag ☐

Project			
Relatie			
Type afspraak			
Status	Definitief		
Locatie			
Korte omschrijving			

Extra info

Notificaties

Overige

There is also the option of creating a recurring calendar event or a group related calendar event. Click on the “Open Window” button, after which the following window will appear.

From the “notifications” tab, a possible notification can be set for yourself or the contact with whom the mutual calendar event has been created.

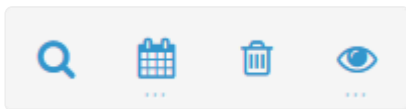
## 6.1. Searching Through The Calendar

### Searching through the Calendar

It is possible to search through your calendar. To do this go to: Calendar/ Tasks -> Calendar, use the button 'search through calendar' (magnifying glass) in the right bottom corner of the calendar to search through the calendar. It is possible to search based on different attributes.

There is also the option of creating a print out of your calendar. To do this click on Search, check mark the events which you wish to add to the print out, and at the 'printer icon' opt for 'Calendar overview' to print out an overview of your calendar.

Unseen calendar items are shown in the Dashboard (BaseNet startup screen) by default. It is also possible to search for unseen calendar events by using the "search through calendar" option.



The "search through calendar" is specified by a magnifying glass icon.



A commonly used function in BaseNet is creating a print out for all unavailability data for selected employees within a specified time span. Click on Calendar/ Tasks (left of your window) -> Calendar.

Now click on the magnifying glass below the calendar. Here the preferred colleague and period can be selected and if desired the maximum search results, in the right bottom corner of the window. Click on the printer icon and subsequently on report 'Unavailability data per employee'.

## 6.2. Creating tasks

Calendar/ Tasks -> Tasks

Click on the “New” button on the right side of your screen after which the following window appears.

The screenshot shows a web browser window titled "Task / Action - Google Chrome". The address bar displays "Secure | https://head.basenet.nl/servlets/objects/rela.task/new". The main content area is titled "Task / Action" and includes a timer set to "00:00:00". The form contains several input fields and buttons:

- Task Type:** A dropdown menu with the placeholder "<select task type>".
- Status:** A dropdown menu with the value "In progress".
- Escalation:** A field with a calendar icon.
- Done:** A field with a calendar icon.
- Task for:** A text field containing "John Smith", with information, list, and close icons to its right.
- Project:** A dropdown menu with a search icon.
- Relation:** A dropdown menu with a search icon.
- Short Description:** A text input field.

Below the "Short Description" field is a rich text editor with two tabs: "Description" (active) and "Other". The editor's toolbar includes buttons for bold (B), italic (I), underline (U), bulleted list, numbered list, link (A), size, and undo.

Along with your name, the option “placed by” is added by default. Also the field “task for” has been filled in. If you wish to assign the task to another person you can erase the entered field and enter a colleague’s name. The task, due dates and reminders will now be generated for your colleague and appear among his/ her tasks.

In addition to calendar events and Emails, it is also possible to link a contact or project. The advantage of doing this is that you can always go back to the contact or project when searching for a particular task and thus a history is built for reference.

By using a ready date and due date, you can set when a particular task has to be completed. In the case of a callback request which has passed its ready date after four hours and which has passed its due date after eight hours, the task appears in green and subsequently turns orange. At this point, it is still possible to finalise the task. After eight hours, the task will turn red, meaning that the task has not been completed in time.

[Tip] Tip



the unseen tasks will be displayed by default. By using the search tool you can access other tasks.

## 7. Correspondance

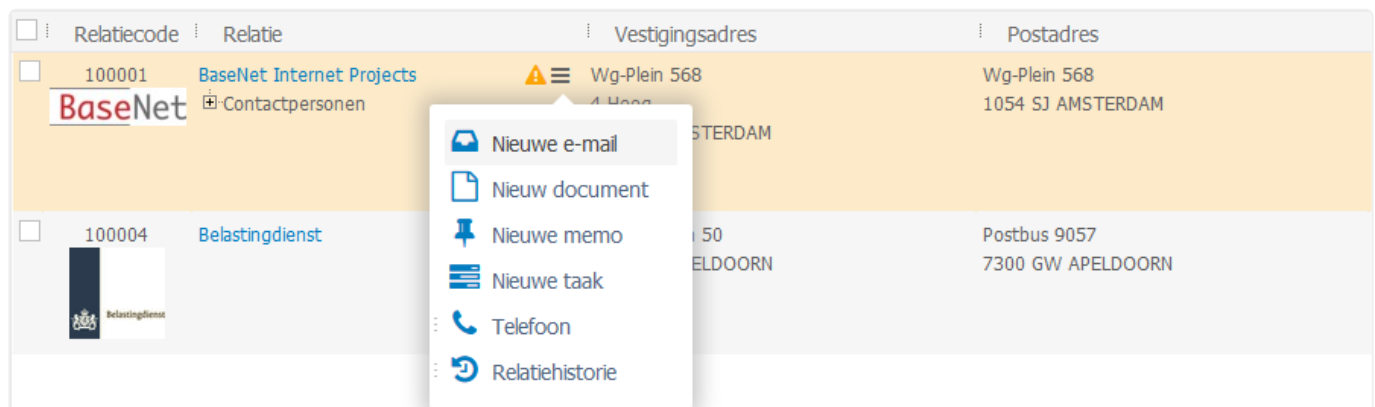
### Sending an Email

#### Actions -> New Email

It is possible to link a project and/ or contact in practically all aspects of BaseNet. This also applies to Email. Linking your outgoing Email to a project and contact(s) results in being able to access those easily in the future. In addition you can compose a new Email from within anywhere in BaseNet, meaning that you do not necessarily have to go to the inbox to do so.

By using the Email icon from within a contact's window (Rolodex card) a new Email is being composed which is automatically linked to that contact.

The purpose of the button shown in the illustration bellow is to compose a new Email.



This button is not available from the search screen. If you wish to send an Email from the search screen this can be achieved by moving the cursor towards “Actions” and subsequently choosing for Email by clicking on it.

#### Project

Here a project can be linked. It is possible to search for parts of a name or to search for a project number/ ID.

#### Contact

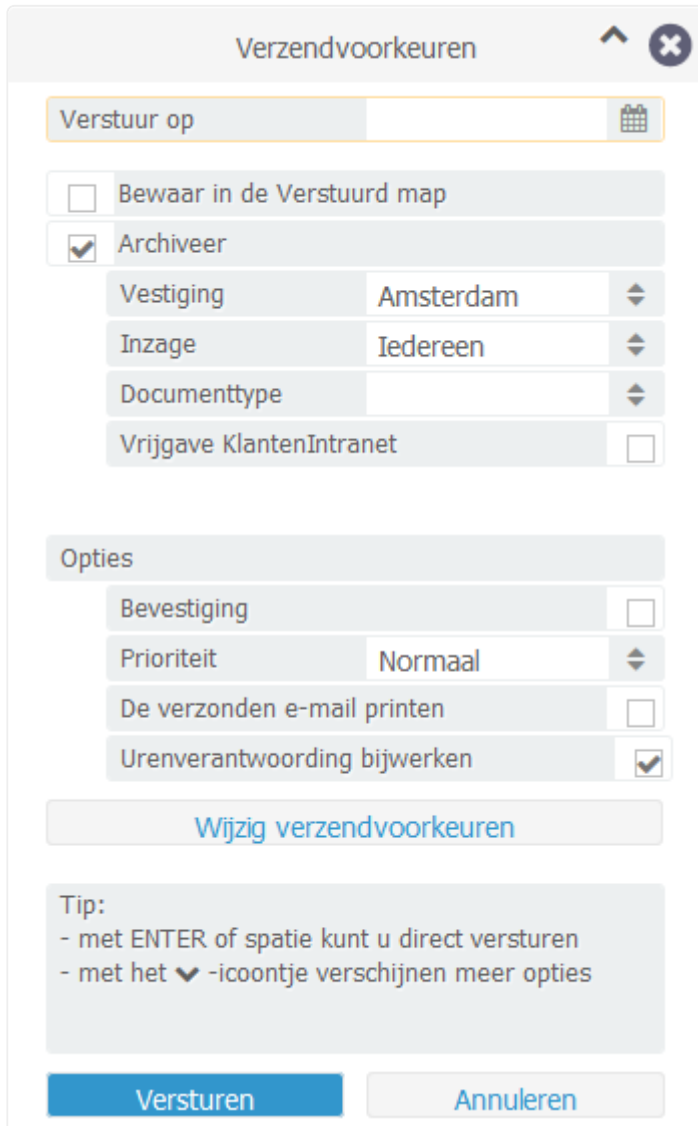
Here the Email recipient's contact (Rolodex card) can be linked. After having sent the Email, the Email will be listed in the contacts history.

#### Templates


It is advisable to make use of templates. Templates can retrieve information from BaseNet's system and make the creation of documents more efficient and convenient.

## Sending

After clicking send in the Email window, there are additional options which can be opted for before the Email is actually sent:





Verzendvoorkeuren


Verstuur op 

☐ Bewaar in de Verstuurd map

☒ Archiveer

Vestiging Amsterdam 


Inzage Iedereen 

Documenttype 

Vrijgave KlantenIntranet ☐

Opties

Bevestiging ☐

Prioriteit Normaal 

De verzonden e-mail printen ☐

Urenverantwoording bijwerken ☒

[Wijzig verzendvoorkeuren](#)

Tip:

- met ENTER of spatie kunt u direct versturen
- met het ▼ -icoontje verschijnen meer opties

Versturen Annuleren

### Bellow is a short summary of those options:

Save in the 'Sent' folder: automatically saves the Email to the Sent folder when the outgoing Email has been sent. Archive: archives the concerning Email to a linked contact and/ or project after the outgoing Email has been sent. As a result the Email will be listed in the contact's history and/ or project. Client portal share: this option only applies if you have acquired the Client Portal service. By checking this box you automatically publicize the Email towards your Client Intranet. Your designated contact now has direct access to the Email. Confirmation: makes sure that the receiving party receives a request to send back a confirmation that they have opened the Email, implying that the Email has been read. Printing the Email after sending: this component only works if the "printing Email after sending" setting has been enabled. For more information regarding this option consult the Personal Settings page.

\* When checking the "Save send preferences by default" box when sending, those settings will be applied when sending any future Emails. All above mentioned settings can now be applied by simply hitting the space bar. In that case the previously enter settings will be applied by default.

# 7.1. Archiving your Email

## Correspondence -> Email inboxes

Conventional Email providers often rely on saving Emails to maps and sub-maps within the inbox environment.

In BaseNet contacts and/ or projects serve as a central reference point instead. All Emails can be archived under/ linked to contacts and/ or projects (matters) for convenient future reference. This also allows for the possibility to have Emails be viewable by colleagues.

### Procedure 6.1. Saving a separate Email

Click on the Email which you wish to archive/ link to a contact/ project

1. Enter a contact or project. This can be done (without opening the Email) in the designated fields which can be found above the preview screen of the Email which has been selected.
2. Add credential levels. For more information on credential levels and designating credential levels, the page regarding Company system settings can be consulted.
3. If you have the Client Intranet enabled and if you wish to openly share the Email, check the “Share Client Intranet” box.
4. Now click on Save in order to archive the Email and have it moved away from the inbox.

### Procedure 6.2. Single handedly archiving a selection of multiple Emails

1. Check the messages which you wish to archive.
2. Click the Save button at the top of the Email interface, which is located next to “New”.
3. A new window appears:

The screenshot shows a 'Save 1 e-mail' dialog box. It has a title bar with the text 'Save 1 e-mail' and a close button (X). Below the title bar, there are several input fields and checkboxes. The first row has a 'Project' label and a search icon. The second row has a 'Relation' label with a dropdown arrow and a search icon. The third row has an 'Access' label with a dropdown menu showing 'Everyone' and a dropdown arrow, and an 'Archive mail per sender' checkbox which is unchecked. The fourth row has a 'Document type' label with a dropdown arrow and a 'Delete from mail box.' checkbox which is checked. At the bottom of the dialog is a large blue button with the text 'Save 1 e-mail'.

1. Add a project and/ or contact.
2. Designate a credential level.
3. Click on “Save selected Emails”

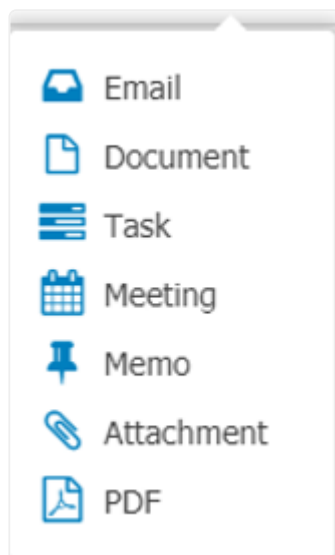


## 7.2. Converting an email into a task

### Correspondence -> Email inboxes

If you wish to defer an Email to a colleague this can be done without forwarding. Please keep in mind that by doing this you lose control over the Email and insight into its status. Therefore, BaseNet allows for the Email to be converted into a task (which can then be completed by a colleague) by the click of a button.

1. Open the Email which you wish to assign to a colleague.
2. In the actions menu on the right top corner of the window click "Task". Below is an illustration showing the actions menu indicating the "Task" option.
3. A new task now appears with a memo field containing the contents of the Email
4. Specify the "Task type", but do not override the memo field.
5. Enter your colleague's name in the "assign Task to" field.
6. Link project and/ or contact. If these fields were already completed in the Email they will automatically be added to the Task.
7. Specify a due date and a ready date.
8. Click on Save & Close to save the Task.
9. The Task has now been assigned to the colleague and he/ she will be able to access the Task. A default Email notification when the assigned Task is completed can be set through Personal Settings.



✿ You can also use the following key combinations [ Control ] + [ Shift ] + [ Alt ] + [ T ] to create a Task.

## 7.3. Creating a Letter

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### Actions > New document

1. In the employee field the colleague's name which should be signed at the bottom of the letter can be entered. The default found here is the name of whoever is logged in.
2. Now enter a contact and if applicable a project.
3. Choose a template.
4. Now enter a subject.
5. Click on "Create letter" to create the letter. Your default word processor will be opened depending on your computer's settings.



#### Attention

BaseNet offers multiple ways of editing a letter and those are:

- RDAV
- Download/ Upload

"RDAV" allows letters to be directly edited and saved through BaseNet.

This option is only available for computers running on the Microsoft Windows or Mac OS-X operating systems. [Click here](#) for more information on making changes to your RDAV settings.

When for whatever reason you are not able to make use of RDAV, the second tab, "download/ upload", can be used. The letter is then first downloaded locally onto your computer's hard drive. In order for your saved changes to take effect in BaseNet, the file has to first be uploaded back onto BaseNet. This is done from the same "download/ upload" tab by browsing the same file which was downloaded and uploading it. This will override the previous version.

BaseNet accounts are by default not enabled to use RDAV because of the particular nature of this applet, which requires prior explanation. When choosing to opt for a default use of RDAV the option can be activated in System Settings.

## 7.4. Searching Within Correspondence

### 5.1. Searching within correspondence

An archived correspondence can easily be retrieved through Correspondence -> Documents & Emails. A search can be initiated based on numerous attributes

The illustration below shows how this would look like.

The screenshot shows the 'Documents and Emails' search interface. It includes a 'Filters' section with various search criteria. Below the filters is a search bar labeled 'Content (fulltext search)' with a magnifying glass icon. At the bottom, there is a table header with columns: Type, Date, Subject, Relation, Project, and Employee.

Click on search to retrieve a particular correspondence.

By default the system searches based on Fulltext, meaning that the system scans the contents of the Documents & Emails component in its entirety.

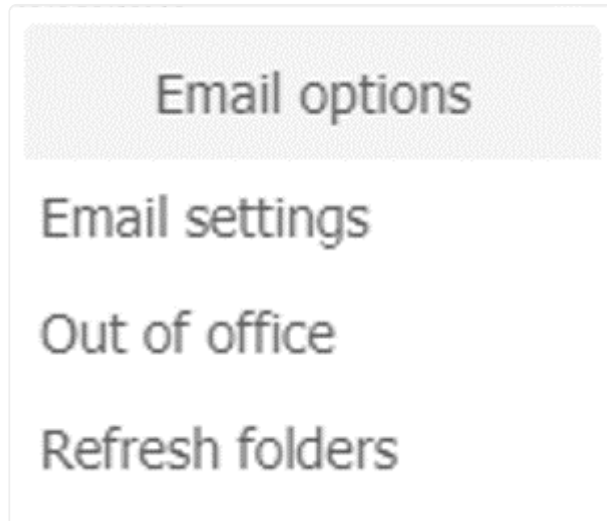
### 5.2. Other functions

Archived correspondence can also be retrieved through contacts or projects. To do this, you need to open a contact or project and click on the History tab to see a listing of all archived attributes. After opening a contact or project the actions menu can also be used to retrieve a more elaborate history.

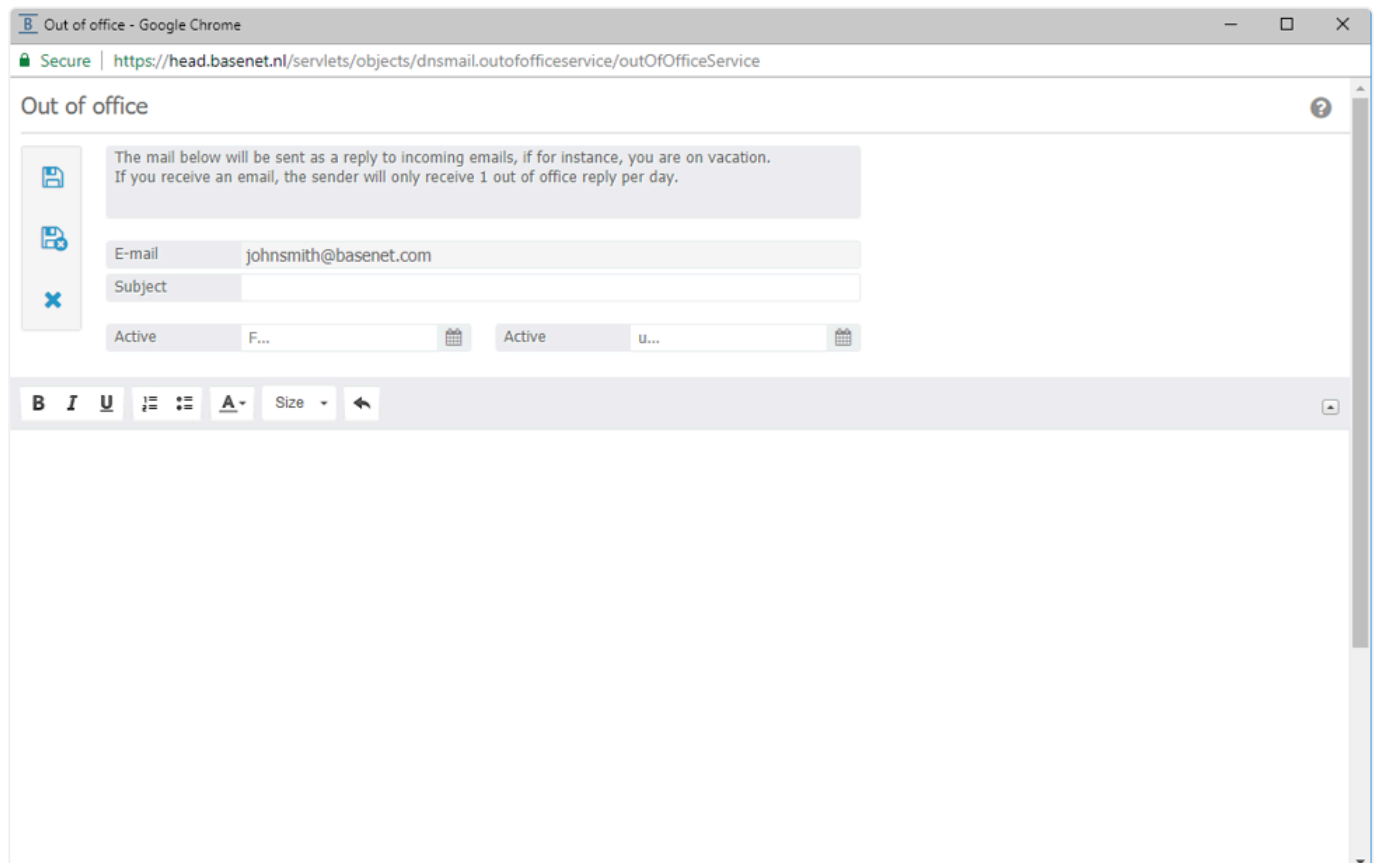
## 7.5. Setting an Out of Office Reply for your inbox

**To set an Out of Office Reply go to Correspondence -> Documents & Emails.**

1. Right click on your email address of your user account in the left corner of your BaseNet screen



2. The following screen will now appear:



3. Here the subject field and text field should be filled in. You can specify from which date you wish the Out of Office Reply to be initiated and until which date.
4. The Out of Office Reply has now been activated.

## 8. Hours/ Projects

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### Hours per day

Introduction to clocking hours

BaseNet offers three ways of clocking hours

- Clocking hours manually
- Clocking hours using the stopwatch widget
- Clocking a series of hours through the multi-hour input window

This chapter will elaborate upon all the above mentioned methods.

Setting an hourly rate

**!** Please keep the following in mind in order to make efficient use of hourly rates.

Hourly rates are decided into four classifications.

- Employee rate per project
- General rate per project
- Employee rate
- Office rate

The system first inspects whether level 1 has been filled in, if so, than that classification is applied. When level 1 is not filled in, the system will automatically seek for the following classification, level 2. Level 3 and level 4 can only be modified by employee's/ employers holding Administration Rights. They can then go to Company Settings -> Hours -> "Default hourly rate" (level 4) or "Hourly rate per employee" (level 3).

### Separate hourly rate input

**Hours / Projects ► Hours per day**

To add a newly clocked hours click on New. A screen will appear as shown bellow:

After opening, the “employee” field and “date” field will be automatically filled in. It is possible to adjust these fields. It is possible to clock prospective hours, although this will be accompanied by a security warning. Enter “activity type”. These hour types can be added to invoice of your hour specification. The activity listing can be manually amended as long as you hold administrator credentials. If so, the latter can be done through the following steps:

**Company settings > Hours > Activity type**

Enter billable hours and worked hours. In the memo field a clarification can be added in regards to the hours. This clarification will be displayed by default in the hour specification of your invoice layout. If you would like to write a consult when working based on a rate per distance you can enter the kilometres/ miles and subsequently checking the “travel expenses” box. If you operate based on a fixed rate per consult, the distance amount (kilometres/ miles) can be skipped, but the “travel expenses” box should still be checked. It is important to follow these steps:

**Company settings > Billing > Billing settings**

Here you can set whether you work based on a per distance rate or a fixed rate per consult.

Link a project (or dossier) and a company and click on Save/ Close in order to save the hour field.

✿ Als u meerdere urenregels moet invullen op eenzelfde project kunt u het beste gebruik maken van Bewaar/Copy om snel meerdere uurregels in te voeren. De inhoud blijft hiermee intact en u hoeft slechts omschrijving en aantal uren in te voeren om een volgende regel in te voeren.

## Quick hour input (multiple hours screen)

**Hours / Projects > Hours per day > Enter multiple hours or straight from BaseNet's main menu (click on a particular day to open the window).**

The multiple hours screen offers the possibility for a quicker input of hours from within BaseNet. Select a particular day by hitting the “tab” key on your keyboard to navigate to the following field.



For optimal use of the “multiple hours screen” we recommend to run through the following settings:

**Company Settings > Hours > Hours per day**

**Company Settings > Hours > Current set hours through the multiple hours screen**

**Amount of clocked hours per day** This setting indicates the amount of default hours per day and sets the colour of the input screen. The hours are set to eight by default. This means that in reality the concerning day will be displayed in orange and an exclamation mark in the hours screen. If more than eight hours are set the day will be marked green with a “v”.

**Clocked hours can be adjusted through the multiple hours input screen** Through this option you can indicate whether you wish to adjust clocked hours through the “multiple hours” screen. Doing this has the advantage of being able to easily adjust clocked hours. The disadvantage is that only fifteen hour fields per day can be set through the “multiple hours” screen. If you clock an average of fifteen hours per day or above we recommend to turn this setting off.

## Hours input

In order to enter hours click on a particular day in the start up screen of BaseNet’s Online CRM and subsequently go to: Hours/ Projects -> Hours per day -> Enter multiple hours, after which the following window will appear as shown in the illustration bellow:



Uren invoer

Datum

23-12-2015

Vestiging

Amsterdam

Medewerker

Arnoud Veen

Project	Tijdschrijfgroep	Type	Fact	Besteed	Omschrijving
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	
			0,00	0,00	

Bewaar

Importeer uit agenda

Sluiten

Enter a project and the system will automatically link the invoice contact of the linked project. Enter the type of hour, clocked hours, spent hours and a description. This can be done for multiple fields if necessary. In order to save the hours click on Save. A confirmation message will appear displaying the entered hours. Click on "OK" and, depending on your settings, the screen will be closed.



It is also possible to import calendar events as hours. This can be done directly from the "multiple hours" screen by clicking on "Import from calendar". The calendar events that are set in your calendar for that particular day will now be analysed by the Multiple Hours Screen.

## 8.1. Various Hours

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### Hour Search Screen

In the Various Hours screen you will find the following search options:

A selection can be made based on the following attributes:

1. Employee
2. Start Date/ End Date
3. Activity type
4. Linked to Invoice
5. Contact
6. Project

These selections can also be applied when creating a summary for management reports. The system has a number of default summaries. If you wish to have custom tailored summaries, please contact your account manager at BaseNet.

### Modifying a project

BaseNet offers the possibility to move multiple hours to a different project. Search the hours of a particular project and check mark them. Click on Modify project, the following window will now appear:

Select the project. The contact will be selected based on the project. Click Modify and subsequently click Close Window.

### Entering hours through the stopwatch

**Actions ► Stopwatch**

BaseNet's stopwatch widget offers the possibility to automatically clock hours after particular activities such as sending an Email or completing a task. It is also possible to manually start and stop the stopwatch.



If you wish to use the "Active Stopwatch Function" in which the stopwatch automatically registered common activities (sending Emails, completing tasks, etc.) the following settings should be changed:

**Company Settings ► Hours ► Automatic Registration**

"Yes" will indicate that the Active Stopwatch Function has been activated, "No" will disable this function.

After making changes to the above settings make sure to click on Save and log out and once log back in

once again in order for the changes to take place. After activating this setting the stop watch will automatically ask you whether you wish to clock the minutes you have spent performing a certain task.

For example, after hitting the send button of an Email (which took 10 minutes from opening the Email, to writing it and sending it) the widget will ask you whether you wish to bill the client for the Email by adding those 10 minutes to the invoice. Stopwatch functions can also be set to particular tasks (such as Email) by going to: Manage -> Company Settings -> Hours -> Default Activities.

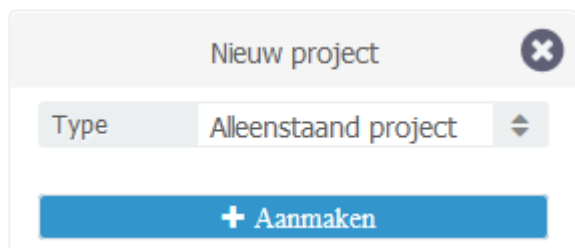
## 8.2. Projects

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### Projects 3.1. Creating a new project

Projects can be created and maintained from the project screen. From within a project hours can be clocked and billed and rates can be set, and much more.

Go to Hours/ Projects -> Projects. Click on 'New' in order to create a new project. The next screen will appear:



The screenshot shows a modal window titled "Nieuw project" with a close button in the top right corner. Inside the window, there is a dropdown menu labeled "Type" with the option "Alleenstaand project" selected. Below the dropdown is a blue button with a white plus icon and the text "Aanmaken".

Select single project, the following window will appear:

**Projecten** 00:00:16 ⌵ 🖨 ?

Projectcode	NEW	Vestiging	Amsterdam	Bijgewerkt	23-12-2015 14:33
Status	Lopend	Inzage	Iedereen	Datum in	23-12-2015 14:33

Relatie ⌵ + 🔍

Accountmanager [Arnoud Veen](#) ⓘ ≡ ✕

Medewerker [Arnoud Veen](#) ⓘ ≡ ✕

Omschrijving

Zoekcode

Financieel Subprojecten Taken Opmerkingen KlantenIntranet Overige Relaties Kenmerken Verhuur

Financiële afspraken Factureren

Algemeen Uurtarieven

Referentienummer  Datum start 23-12-2015 📅  
Datum gereed  📅

**Factuurrelatie** Debiteurinstellingen

Relatie ⌵ + 🔍

Wijze facturering Maandelijks ⌵ Kantoorkosten % 6,00 Reisk. per bezoeker ⌵

Fixed price  Fixed price gefact.

Max uren  Max uren gefact.  Geschatte uren

Voorschot  Voorschot verrek

Verreken voorsch. Volgende factuur ⌵ Voorschot gefact.

Waarschuwing uren  Bestede uren  Factureerbare uren

Uren fact. standaard op 0 ☐

Inactief ☐

The account manager and employee will be auto completed along with the user who created the project. This can be modified if necessary.

Contact: Select contact at the top of the Project's contact screen. The contact may have not yet been filled in. In that case first select the contact type and then click on the "+". The contact can now be entered. When this is completed click on 'Save/ Quit' after which the contact will be linked to the project.

Description: Enter the project's description, the description's search code will be automatically applied. Change this if necessary. Click on 'Save' to save the project.

Go to the 'Project Info' tab

Quotation/Reference number: If applicable enter the customer's quotation number or the reference number.

Start date: The start date is automatically set to the present day. This can be changed if necessary.

**Contact:** If the invoice's contact differs from the project's contact, then add the invoice rule.

**[Tip] Tip**

Make use of this function as well: If you wish to bill to contact B of company X, while the client is contact A of company X this is seen as two separate contacts in BaseNet.

Specify the agreed rates under invoice contact field.

**Method of billing:** Here you can choose between monthly, quarterly or annually if applicable/ billable. This is solely meant as a search tool for project billing. The next paragraph will elaborate on project billing.

**Warning in case of hours greater than (..):** If you wish to receive a warning notice when reaching a certain amount of hours, this can be set here.

**Estimated hours:** Here when specifying the amount of hours, a status per project will appear in the search screen of the estimated hours.

**Office expenditures:** Enter the percentage of office expenditures which you wish to be taken into account when clocking hours.

**Fixed price:** When the same rate applies to all activities, specify this here. Continual expenses or separate invoice fields will be billed.

**Maximum hours:** Specify the maximum amount of hours which you wish to bill. When exceeding the amount of hours, those additional hours will not be billed, even when adding them to the clocked hours/ invoice.

**Retainer:** If you wish to initially bill your client a retainer, this can be specified here. When billing the summary will first be created which only contains the retainer. The hours and/ or additional expenses will be ignored when billing the retainer invoice.

**Deduct retainer:** Here you can specify whether you wish to deduct the billed retainer in the following invoice or when the project status is changed to 'Ready'.

**Travel expenses:** Here you can choose between travel expenses per visit or per distance. Now enter the desired amount. When clocking hours you can now specify whether this should be billed.

### 3.2. Billing from within a project

Go to the 'Financial' tab

In the Hours/ Rates tab you can set the project's default rate. You can also specify a modified hourly rate per employee.

The default rate for all projects can be set through Manage -> Company Settings -> Billing -> Invoice Settings.

In the "Invoice Fields" tab separate invoice fields can be created which should be billed towards the client.

Product/ Art: Select which product you which to bill.

Enter the amount of hours.

Description: The project's description will be automatically added here. If necessary this can be edited.

Price: Specify the amount.

[Tip] Tip

The rate/ price per product is displayed by default excluding tax. If you wish to enter the price including tax, please contact your account manager at BaseNet.

Click on 'Add' to add an invoice field to the project, in order to prepare it for billing.

To create the actual invoice go to the 'Invoice' tab. Click on Billing, the invoice will now be created.

The field which appears in the screen is the invoice. If at this stage you wish to modify it, double click on the field. The invoice will now appear in a new window.

You can open the invoice in Word for the purpose of a print out by clicking "Print invoice". You can also open the project directly from the invoice by clicking the 'Print' button.

Modifications to the invoice should only be made from within BaseNet and not Word!

### 3.3. Task management from within the project

Tasks can be created and managed from the 'Task' tab. Click on 'New' in order to create a task. Go to 'Create Task'. Here you will find further explanation on how to create a task.

After one or more tasks have been created, the following screen will appear, when a task is ready to be performed.

The tasks are ready to be performed. The 'Status' column shows the task's colour.

Green: Both the due date as well as the ready date have not yet been reached, the task does not yet have to be performed.

Orange: The due date has been exceeded, the ready date has not yet been reached. The task should be performed within this time span.

Red: The due date and ready date have been exceeded. The task should have been performed by now.

After completing a task, the status can be changed to Ready.

### 3.4. Remarks

In the "Remarks" field, two kinds of remarks can be added.

Remarks: In this field you can add default remarks appertaining to the project. These remarks will only be accessible from this screen.

Alert notice: When creating an Alert notice, a yellow icon with an exclamation mark will appear in the project. This icon will also be displayed in search results in which the project might appear. The purpose of the Alert notice is to have it be visible at all times, when a project is being searched. When holding the cursor above the icon, the contents of the Alert notice will appear.

## 8.3. Project Billing

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### Hours/ Projects -> Project Billing

From the Project Billing screen you can create invoices based on billable hours and/ or additional expenses using several projects at once.

\* Through the “Hours till” and “additional expenses till” you can easily filter based on hours and additional expenses until a specified date. This can be useful if you wish to bill until a particular date.

Click on Search in order to see a summarized lay out of billable projects. In this overview you will see which hours are still open and which hours are specified as additional expenses, under the Performed actions tab. Here you will also see the retainer which can be shown in the project which has been filled in.

It is possible to create an invoice summary in advance, before billing, using Excel. In order to do this select the concerning project(s) and click “Summaries” on the left side of the screen. Subsequently select the rapport “OHW\_SPEC\_UREN” in order to create an Excel export containing the hours and the billable amounts.

If you still wish to make changes in for example the hours all you need to do is click “hours to be billed” from the list.

A new window opens containing the hour fields which are ready to be billed. At this stage you can still make changes to attributes such as the description.

After a check up the invoice can be created. This can be done by check marking the concerning projects from the list and subsequently clicking the “Create/ Amend Invoices” button.

The invoices will now be generated and after completion a new window will appear noting that x amount of invoices have been created. This window serves solely as a confirmation and additional check up. Clicking “OK” will close the window.

To print the invoices after having created them, click the “Print/ Amend invoices” button and subsequently click on “Print”.

At this stage the invoices are still individually amendable. This can be done by clicking the link titled “Open Invoice” followed by the created invoice number/ ID. This link is available from the ‘Invoice’ column. A new window appears as shown in the illustration bellow:

The invoices can still be manually edited/ corrected from this screen and additional fields can also still be added.



If all invoices are in order, the invoices can be processed. By doing so the invoices which have just been created will receive “Billed” status and will be forwarded to your administration. For this, once again check mark all projects and click on “Print/ Process Invoices “. Now click the “Process” button in order to process the invoices.



After having processed invoices these will NO LONGER be amendable. This process is NOT reversible. Only click the Process button when you are almost certain that all invoices have been entered correctly.

You have now created the invoices. The invoices will no longer be listed unless you have clocked additional hours to the invoice.

In case you might possibly want to add changes to the invoice you will first need to credit the invoice. This can be done from the outgoing invoice through the “Create credit bill” button. The hours and additional billings will this way once again be listed and become billable.

# 9. Events

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## 9.1. Creating an event

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## 9.2. Adding invitees to an event

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## 9.3. Participants

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# 10. Administration Component

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# 11. Company Settings

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## Company settings

The company settings allow for changes to be made which will take effect company wide, such as creating new user accounts and managing Email addresses.

In the right top corner of the screen click on your name and then move your cursor over “Settings”. The button will then change to two possible options, Personal Settings or Company Settings. If you do not have Administrator Credentials you will only see the Personal Settings appear.



The “Company Settings” option is available by default to every first BaseNet user account within a company, or the user account of the person who signed up for the account on behalf of the company. It is possible to grant Administrator Credentials to gain access to Company Settings, this requires a written request on behalf of the Administrator Credentials holder and sent from the Email address that is registered under that user account. The Email can be sent to **[servicedesk@basenet.nl](mailto:servicedesk@basenet.nl)**.

# 11.1. System

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**Company Settings:** From this menu you can set your Company Settings. It is also possible to upload a logo. The data which is added here will be applied company wide to default templates and other components.

**Back up:** Through this menu a client backup can be requested. All your data within BaseNet will be offered as a compressed zip file. A one time fee of € 15,00 will be billed for the back-up request.

**User accounts:** User accounts can be created from this menu. Follow these steps in order to do so:

1. Through, Contact Management create -> Employees, create the contact card of the prospective user account. This does not have to be fully completed, but at least the name and Email address have to be entered.
2. Go to Manage -> Company Settings -> System -> User Accounts, and click on Search to retrieve the previously made contact card of the employee from the Rolodex. Double click the concerning field in order to make the following window appear which allows for the user account to be made.
3. Specify a password and click Save in order to create the new User Account. It is also possible to directly Email the login credentials to the concerning employee. In order to do so use the "Save and Email" button after which a newly composed Email appears containing the login credentials of the concerning employee.



**Warning**

Newly made user accounts will automatically be added to the invoice for monthly billing.



**Tip**

If the employee requires access to the App, the user account should have the mobile number entered and the box "Access to App" should be checked and subsequently saved.



**Tip**

Through the "User Accounts" menu it is also possible to reset an account who's user has made up to five unsuccessful login attempts. Deactivating an account is also possible. The user's access to the app will therefore be instantly revoked.

**IP Security** It is possible to limit logging in to BaseNet's Online CRM to particular users. Everybody can login everywhere by default. A particular IP Address can be specified through this menu if you wish that BaseNet's Online CRM can only be logging in at certain locations. In order to set a certain IP Address follow these steps:

1. Go to Manage -> Company Settings -> System -> IP Filter
2. Click on New. A window will now appear.
3. Now enter the IP Address in the IP field. To use the IP Address of the location which you are



currently accessing your BaseNet account from, click the “Use current location’s IP Address” button.

4. A description can subsequently be added, followed by the Save/ Quit button for your changes to take place.

**Credentials:** BaseNet can be set to certain credentials. These function as Accessibility Levels, each providing a certain amount of access and/ or use of components. The groups can be manually created and managed. All employees have access to “All” and “Private” credentials. From “access menu” each user’s access to each level of access can be determined.

The “Credentials” can be linked to several saved items such as “Emails”, “Calendar Events” and “Projects”. Access to particular components can also be excluded from within this screen.

**Accessibility Levels:** By using Accessibility Levels you can specify which Accessibility Levels should be granted to which users.

**Importing Data:** This menu allows for a simple import within BaseNet. The Chapter which touches upon importing contacts provides further information on importing data.

**IP Security:** When using IP Security a verification Text Message can be required in order to log in on locations which are not listed in the IP Security settings. The user will then receive a confirmation code by Text Message which has to be entered before completing a login session bypassing the IP restriction.

Text Message verification is activated by default when the user has specified a cellphone number. This number can be added by going to:

1. Manage -> Company Settings -> System -> User Accounts
2. Under the ‘Extra Text Message required if logging in outside IP Secured zone’ tag the ‘mobile phone number’ can be filled in, which would be the mobile phone number of the employee. Click Save for the changes to take place. From that point on the Text Message verification option is activated for that user/ employee.

## 11.2. Project

---

**Project status when linking:** This setting appertains to the linking of projects. The system will search for all projects by default. By applying these settings, projects with particular classifications (such as canceled projects) will be excluded from search results. The projects which are filled in here will be applied when linking.

**Project Contacts Type:** This menu allows for the management of contact types which have been linked to projects.

## 11.3. Contact Management

---

**History Settings:** After opening a Rolodex card or a project the most recent items appertaining to that project or contact will be listed in the “history” tab. These settings can be used to specify what and how much should be listed.



Keep in mind that the higher the default search result quantity is set, the longer it takes for the search results to load.

**New Companies From External Sources:** Here you can manage settings appertaining to external contacts. For example which source (Chamber of Commerce or Yellow Pages) external contacts will be retrieved from.

**Contact Attributes:** Attributes allow for contacts or projects to be specified. Attributes can be used for selections and mailings or for retrieving large numbers of contacts and/ or projects. These can be created and/ or managed from this menu.

**Project Attributes:** This menu lets you manage attributes appertaining to Projects (Matters).

**Default tab for external sources:** This menu allows for management of default tabs when searching new contacts from external sources.

**Project contact types:** This menu allows for management of contact types which you wish to link to a project.

**Project relation types:** Here contact types can be created. These can be used in the “other contact” tab. This tab can be found in a Rolodex’ contact card under the company, contact as private person or contact as individual and is meant to associations between certain contacts.

## 11.4. Legal

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**Areas of Law:** This menu allows for the areas of law to be specified, which can subsequently be selected in a matter.

**Know-how Areas of Law:** Here Areas of Law can be managed for the Know-how component.

**Role Administration:** Here a Role Administration can be set. These steps can be applied from within the Role Administration component. In the Role Administration chapter more information can be accessed in regards to the Role Administration. To create an action follow these steps:

1. Click on New to define a new action.
2. Use the description field to enter a description. These serve as a reference to retrieve the types of action or when linking them.
3. Use "Type of Action" to specify which action/ mechanism should take place when applying that action.

**Responsible employees for Know-how publication** Here credentials can be designated for the BaseNet Know-how component.

- Enter the type in the "Task" tab, which should be started and when the task should be completed.
- From the 'Calendar' tab you can specify the duration of newly made events, the calendar type and the calendar availability status.
- Click on 'Save/ Close' for the changes to take effect.

**ID number Archive number:** The ID numbering of archived matters can be edited here.

**ID number Matter number Legal:** The ID number of matters can be changed here.

**Standard WIP percentage:** Here you can set the default WIP (Word in Progress) percentage.

## 11.5. Calendar

---

**Calendar Layout:** This menu lets you change the calendar layout, for example, which period the calendar should show by default.

**Publicizing Calendar Online:** Here you can specify whether you would like to publicly list your calendar online. Choosing this option will create a url which can be used to access your calendar's feed through third party calendar applications. This is a read-only option, meaning that no events can be created.

**Agenda feeds:** Linking information to your contacts. Here you can add your contact's calendar. This information will then be used to create group events. This way the system can check whether there an event has already been created.



**Beware:** BaseNet does not offer any support for external products and services, such as calendar feeds through programs offered by third parties.

**Types:** This menu offers the option of creating Calendar Types. Each Calendar Type can be given a designated colour. The colour used here appertains to the colour of the calendar event which you have created.

**Status:** Here you can modify the status of your calendar event. Here you can also set a colour per calendar event.

**Employee's in the Calendar:** Here you can set the calendar access per employee. By moving your cursor above multiple employee's you can remove or- grant access to entire groups.

**Employees in the multi calendar.:** Here you can specify which employees you wish to see in your multi-calendar compilation feed. This can also be set per user. This applies to the employees which you can select in the multi-calendar.

**Selected by default in the multi-calendar:** These settings can be used to specify which employees can be selected by default when opening the "multi-calendar".

**Calendar notification:** If you wish to have an automatic calendar notification for each calendar event you can specify that in this screen. The time which you have previously set will result in a pop-up. This can also be set per individual calendar event.

**\*Set up calendar layout** Here you can set the layout of your calendar events. We do stress that this should only be done with sufficient prior knowledge of template codes. No support is offered for this setting.

**Default location completion:** When creating calendar items through the above settings, a default location can be specified. Here you can opt to have the location of the linked contact in question to be automatically filled in. This setting can also be disabled and in that case the location will not be

automatically filled in when linking a contact or project.

## 11.6. Tasks

---

**Default amount of days after which you are searching:** If you have too many tasks, it can be helpful to only show a certain amount of days ahead. In this case, you will only see tasks for certain days, which you have indicated in the settings. Whilst searching, you can set for an exception to show additional tasks.

**Automatically creating a task with a concept:** When you activate this setting, a task for a specific person will automatically be generated, when a concept is being prepared.

**Send me email notifications about tasks that have been set up and created:** In this menu, you can set whether an email notification should be sent along with the created tasks.

**Show task warnings in the dashboard:** If you enable this setting, you will receive an automatic “pop-up” notification for created tasks in BaseNet’s dashboard. This “pop-up” can also display calendar items in addition to tasks. It is also possible to manually set a “pop-up” for specific tasks.

**Default selection in the task search:** Here you can set the default search for certain employees.

**Default task type for new tasks:** In this screen, you can create a default attribute for newly created tasks.

**Task status:** In this menu, you can manage several task statuses.

**Task types:** In this menu you can create types of tasks. For each type you can set a due date and a completion date.

The following image shows an example of task with the type “callback”.

Taak

00:01:16

Type taak

Bellen

Status

Open

Taak voor

Arnoud van Veen

Project

Delft / Immigratiedienst (D2016281)

Particulier

Dirkje Delft

Korte omschrijving

Bellen - Dirkje Delft

Omschrijving

Overige

B

I

U

A

Let...

Terugbellen op XXXXXXXXX vóór woensdag 12:00.

With a callback request you wish to have someone call back within 4 hours after the task has been created. After 8 hours this person would be too late. For this you click on “New” after which you fill out a description in “Callback”. In “Escalation after” you set “4” under performed hours and “1” under “Ready by”. If you now create a callback request this will appear with a green icon, after 4 hours the task shall escalate and the icon turns orange after which it will subsequently turn read if the task has yet to be completed.



## 11.7. Correspondence

---

**Document editing settings:** This menu allows you to specify in which way you wish to edit your BaseNet documents, whether through manual download/ upload or through BaseNet's Java applet.



These settings are primarily meant for BaseNet support associates. You will rarely need to access or adjust these settings.

**Temporary files:** This screen allows you to manage settings appertaining to temporary files, such as for instance, the interval at which temporary files should be saved at.

## 11.8. Hours

---

**Amount of office hours per day:** In this screen you can specify the office hours per day and based on that, the colour (and other attributes) of the opening hours screen is determined.

The amount of office hours can be determined based on spent or billable hours.

**Modifying current hours through the multi-hour screen:** In this screen you can assign hours through the multi-hour screen.

**Default description:** Here you can modify the default hour description.

**Default activities:** This menu is only applicable when using the stopwatch widget. Here you can specify which types of clocked hours should be used in certain performed tasks.

**Stopwatch:** Here you can make changes to the functionality of the stopwatch, for example, whether the stopwatch should be visible, or whether the stopwatch should be opened by default, etc.

**The project is mandatory when clocking hours:** Here you can specify whether a project should always be mandatory when clocking hours. It is highly recommended to enable this by default.

**Default hourly rate per project:** Here you can set a default hourly rate for your projects. This will be automatically applied for newly created projects after enabling this setting.

- **Activity type\*:** Here you can create hour types and/ or modify them. Hour types can be selected when entering clocked hours and can also be shown in the invoice layout.
- **Hour description may be empty\*:** This setting allows you to leave the description field empty, it is highly recommended to disable this option.
- **Hourly rate\*:** Here you can set an hourly rate per employee per timespan.

### Travel expenses per distance

Here you can set travel expenses per distance (miles). When writing clocked hours you can enable the Travel Expenses field and insert the distance amount for billing.

This setting specifies how the hour layout is displayed in the Dashboard. If you specify “8” for example, the hour layout will not turn “green” until 8 hours.

### Default description

Here you can set a default description which the system will apply when using hour input. This description can naturally also be expanded manually or removed per hour field.

## Default clocking

This settings is only applicable when using the stopwatch widget. When enabling this setting, the stopwatch widget will automatically clock certain actions, such as completing a task or sending an Email.

## Amending certain hours from the multiple hours screen

Enabling this setting allows you to modify hours from the multiple hours screen. All registered fields will remain the same. This will, however, be applied as long as more than fifteen hour fields have been entered per day through the multiple hours screen.

## 11.9. Templates

---

**Email:** Here you will find all Email templates. When starting off as a new BaseNet user your account contains a number of default templates which can be modified. New templates can also be created from scratch while keeping an example in mind.

When using a particular Email template quite often you can set the template as your default template which will be pasted into the Emails body with a single click on the template button (without going through a drop-down menu). This can be set by clicking the “Use as default template” button. Moreover, by clicking on “Remove as default template” you can disable this setting for that particular template.

**Documents:** Here you will find all Document templates. When starting off as a new BaseNet user your account contains a number of default templates which can be modified. New templates can also be created from scratch while keeping an example in mind.

**Memo** Here you can create templates specifically for memos.

**Custom Tailored Rapport:** This screen lets you manage different rapport templates.

**Statistics:** Here you can manage templates for different statistics.

### Important

Templates allow you to compile Emails, letters or rapports. Creating advanced templates require certain technical knowledge. BaseNet does not offer support for creating or modifying templates. However, BaseNet offers custom tailored templates based on your personal preferences. This is done through our specialist template team for an hourly fee. Again, there are a number of default templates which can be used and modified. In order to amend BaseNet’s default templates Administrator Credentials are required. BaseNet strongly advises to first create a copy of the template before making changes which would then serve as a back up if irreversible damage would have happened to the initial template.

## 11.10. Billing

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### Billing

Document type, Documents (in regards to) billing

Invoice Settings

Invoice Templates

Invoice Settings (addition)

Sending reminders to the concerning Email address only when debiting/ crediting info

Access Credentials in regards to billing

Open invoices which appear in contacts (Administrator Credentials)

Master data and Email templates

Type of uncompleted invoices in alert description (Administrator Credentials)

Invoice number/ ID

Activity Packet

Activity Group

### Invoice Settings

Here you can modify the invoice settings. These settings apply to all new projects which you create from that moment on. Please mind NOT to modify linked items. This has direct consequences when billing your invoices. The Administration chapter of this manual provides additional information on these settings.

### Type of open invoices in alert description (Administrator Credentials)

These settings allow you to specify whether open invoices should be displayed as alert descriptions, while using the Administrator Credentials. Contrary to other settings, this setting is not enabled by default.

### Displaying open invoices along with contacts (Personal Settings)

This setting is linked to “Open invoice type in alert description (Administrator Credentials)”. Here you can actually change settings per employee appertaining to whether the user in question is allowed to see alert descriptions next to contacts or not.

## 11.11. Intranet Portal

---

The Intranet Portal is available as a supplementary component. The settings below only appertain to the acquired Intranet Portal.

h4.” Consult this link to see the monthly implementation costs. “:<https://www.basenet.nl/software/advocatuur/tarieven/>

“Automatic publication of Intranet Portal”

- Automatic publication of Intranet Events – Here you can specify whether you would like to publicise certain calendar events in the Intranet Portal by default.
- Automatic publication of Intranet Documents – Here you can specify whether you would like to publicise certain documents in the Intranet Portal by default.
- Automatic publication of Intranet Emails – Here you can specify whether you would like to automatically publicise certain Emails to the Intranet Portal by default.
- Automatic publication of Intranet Tasks – Here you can specify whether you would like to automatically publicise certain tasks to the Intranet Portal by default.

**Notifications** When publicising documents or Emails from your Intranet Portal, a notification Email could be set to be sent to the concerning Intranet User(s)/ Client(s) who have access credentials to the matter in question. When publicising a document, this option can be enabled by marking the box.

## 11.12. Administration

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**Manage -> Company Settings -> Administration**

### **Administration Access Credentials**

Through this menu you can specify which users should gain access to which administration.

## 11.13. Personal Settings

---

**Telephony Settings:** Here you can manage settings appertaining to the BaseNet Phone Applet.

**Personal Settings:** Here you can specify how you wish to be listed in BaseNet. When saving, your name and initials become attributes in the system.

**Default contact when searching:** Contact Management has been divided into contacts as private persons, employees, companies and contacts as individuals. Here you can specify which contact type you wish to search for by default.

**Text Message Sender:** When sending Text Messages you can specify whether you wish to display your own number or a particular name as the sender. If the latter option is enabled, the addressee would then see a particular name instead of a cellphone number.

**Default Search Result Quantity:** The System lists 50 search results by default, even when more than 50 search results exist. Limiting the search result listing to 50 fastens the search process, but can also cause certain information to not appear unless more than 50 is set. BaseNet offers a refined search by using filters, this would ideally prevent the necessity of a higher search result count.

**Default Access Credential:** These settings allow for you to opt between save while applying certain Access Credentials, including insight for certain employees and excluding insight to other employees.

**Linking a contact to a project by default:** This screen lets you specify which attributes should be automatically linked to a contact.

**Change Password:** Here you can change your password.

**Contact Layout in Search Screen:** This setting allows you to indicate how you wish contacts to appear in the search screen. You could opt for an official name, including title or Name+Surname.

**Displaying Template codes:** Enabling this setting offers access to template codes per field.



## 11.14. Email

---

From the “Manage Email Addresses” screen you can (as the title already indicates) manage Email addresses.

**Which colleagues have access to your Email:** From this menu you can indicate which colleagues gain access to your Email accounts. When having created this setting, the concerning colleague sees a “drop- down menu” with the concerning Email where he/ she can toggle between inboxes.

**Which colleagues are allowed to send you Email concepts:** Here you can specify which colleagues can send you Email concepts for you to revise and subsequently send.

**Request to create a print out directly after sending an Email:** This setting allows you to specify whether you wish to create a print out of an Email right after sending. Enabling this setting will make an additional setting appear in the “Post Send Options” window which appears right after sending an Email.

**Always sending Bcc:** Here a particular Email address can be specified. The system will then send a Bcc to a particular Email address after each outgoing message.

**Linking a contact to a project by default:** By enabling this setting the system will link a project to a particular contact by default.

**Default Email template:** Here a default Email template can be selected and by using the check mark box, you can specify whether the template should be filled in with each new Email. The latter is highly discouraged as the title and addressee is not automatically filled after the contact and project are entered.

Pre filled in sentence which is added at the beginning of each new Email response. This sentence is set to Dutch by default, however diverting to the English setting is possible.

# 11.15. Workflows

---

## Manage > Company settings > Workflows

In BaseNet workflows are a series of linked tasks. It is possible to trigger a task individually and to distribute it over certain employees, functions or departments.

### Example 12.2. Functionalities of workflows

When you want to create a call registration for instance for a sales call, certain actions precede this call registration. For example receiving a task, which prepares you for the sales call and one task after the call, which reminds you of a call follow-up. For this purpose, a workflow can be created for the concerning tasks after the registration of a calendar event with the label “sales call”.

The following chapter explains how to create a workflow.



#### Important

Workflows are somewhat complex and therefore difficult to create. BaseNet offers you to create a workflow for you. Therefore, BaseNet's service desk is at any time available. You can use a contact form for this matter. Go to Manual > Contact. After receiving your desired workflow request, we will send you a quotation of the expected costs.

### 19.1. Creating workflows

## Manage > Company settings > Workflows > Workflows

### Procedure 12.1. Creating a workflow

To create a new workflow click on New, after which the following screen appears:

## Onderhoud workflow definities

Omschrijving

Deze workflow alleen tonen bij

Afdeling

Tweede Afdeling

Medewerker

Alleen bij

Agendapunt

Status

Definitief

Enkel starten als vorige status niet leeg was

Activatie vraag

Activatie

Start workflow op eve

Dagen

0

Uren

0

Minuten

0

Definitie code

NEW

Laatst bijgewerkt

07-06-2016 12:11

Inactief

Type

Bespr. kantoor

Event

Starttijd

Code

Omschrijving

Medewerker

## Dashboard

In the description, you can specify whether you wish to assign/ link the workflow to a particular user. This is not mandatory. Here you can also specify which department you wish to use the workflow for.

## Defining type

When the description and other details, have been entered you will reach the screen where you can specify the workflow type and its duration. You can now choose for workflow type, you will see the following illustration confirming that you have chosen for “calendar item”.

Page 97 of 132

When you have indicated this you can specify the calendar item's status and the type of calendar item. Hereby you specify which "event" should trigger the workflow.

## Activation

Here you indicate when the workflow should precisely be initiated, such as, for instance, the moment that the calendar event has been set to "Definitive" such as in the case of calendar type "Sales Call".

## Moment of activation

Here you can specify whether you wish to set a warning message before starting a workflow or whether the workflow should be initiated automatically without being preceded by a dialogue box.

There are several types of activation, the specified type depends on the type of workflow which you wish to make. The following possibilities are available as listed below:

### Start workflow on event

This means that the workflow is initiated as soon as the event is saved or confirmed. An event could be a calendar event or project, for example.

### Start workflow X days/ hours before event

In this type you can specify a day on which you wish the workflow to be initiated and in the settings you can indicate when the workflow should be completed.

### Complete workflow X days/ hours before event

In this type you specify by which date the workflow should be completed, by entering a particular date, when the calendar event takes place and you can set that the workflow should, for example, be completed one day in advance or one day before the calendar event takes place.

**Start workflow X days/ hours after entering the calendar event, this can be done, for example, as a confirmation towards the customer in the form of a callback after a calendar event.**

### End workflow X days/ hours after event

When opting for this option, you can specify how many days after the calendar event has been created, the task should be completed.

### New workflow task

When the workflow's startup screen has been set you can continue with creating tasks. When wanting to set a task for a new workflow click on 'New' in the workflow screen.

When you have done this, you will reach the New Task window. Here you can enter a description and a summarised description. The information and changes made should always be saved.

Workflow settings: Here you can set the default status. This way a task can be kept on hold and when you indicate that the task is ready or planned, the status will switch to “in progress”.

This means that the task is activated from the moment that the following task has been completed.




A fixed time can be indicated per task, so that the task should, for example, be completed in 2 weeks. When you are in the stage of working on following tasks and done with the first task, the consecutive task might turn its status to “escalated”, meaning that it has been delayed. Escalation serves as a warning and reminder that the task should be completed before its deadline/ completion date.

A fixed time can be entered by choosing “Yes” in the fixed time field.

In the trigger field, you may also opt for Yes or No. When opting for Yes, the escalation time and completion time are adjusted. When setting this to No, the ready date and escalation date are subsequently modified and will not affect subsequent tasks in the workflow.

Task data (as shown in the illustration) indicated how a time can be set for the workflow of the task. This time will be displayed in the date bar of the escalation and ready field. The data will then be shown in the right top corner of the task window.

### Workflow taken

Omschrijving

Korte omschrijving

Taak code

Laatst bijgewerkt

Inactief

NEW

07-06-2016 12:16

☐

Workflow controle

Taakgegevens

Toekenning

KlantenIntranet

Overige zaken

Geplande tijd (in u...

0

Inzage

Iedereen

Gereed binnen

Werkdagen

0

Werkuren

0

Minuten

0

Escalatie na

Werkdagen

0



Werkuren

0

Minuten


0

**B****I****U**



**A**

Let...



As you can see, the planned time for this task is set to 0. In addition, this task should be completed within 1 office day.

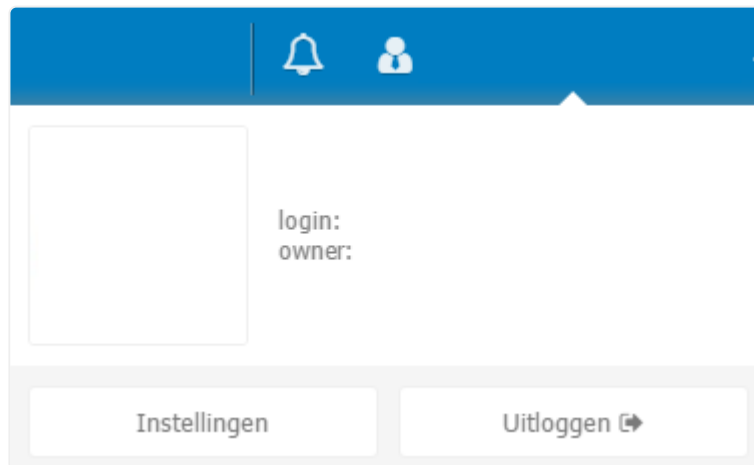
After 4 office hours you will receive a notification that the task is about to escalate, meaning that you are reaching your deadline.

## 12. Personal Settings

---

### Introduction to Personal Settings

In the right top corner enter your name and click on “Settings”, if you have “Administrator Credentials” you should click on “Personal”



Every user has access to personal settings by default. Personal settings allow users to change aspects of their calendar's layout, search features, etc. Personal Settings can be turned off at request, however this is highly discouraged.

## 12.1. Personal

---

**Telephone Settings:** Here you can manage settings appertaining to the BaseNet IP-Phone Applet.

**Personal Settings:** Here you can specify how you wish to be listed in BaseNet. When saving, your name and initials become attributes in the system.

**Default contact when searching:** Contact Management has been divided into contacts as private persons, employees, companies and contacts as individuals. Here you can specify which contact type you wish to search for by default.

**Text Message Sender:** When sending Text Messages, you can specify whether you wish to display your own number or a particular name as the sender. If the latter option is enabled, the addressee would then see a particular name instead of a cellphone number.

**Default Search Result Quantity:** The System lists 50 search results by default, even when more than 50 search results exist. Limiting the search result listing to 50 fastens the search process, but can also cause certain information to not appear unless more than 50 is set. BaseNet offers a refined search by using filters which in turn this would prevent the necessity of a higher search result count.

**Default Access Credential:** These settings allow for you to opt between save, while applying certain Access Credentials, including insight for certain employees and excluding insight to other employees.

**Linking a contact to a project by default:** This screen lets you specify which attributes should be automatically linked to a contact.

**Change Password:** Here you can change your password.

**Contact Layout in Search Screen:** This setting allows you to indicate how you wish contacts to appear in the search screen. You could opt for an official name, including title or Name+Surname.

**Displaying Template codes:** Enabling this setting offers access to template codes per field.



## 12.2. Rolodex Management

---

Personal Settings -> Relationship Management

**History Settings:** After opening a Rolodex card or a project, the most recent items appertaining to that project or contact will be listed in the “history” tab. These settings can be used to specify what and how much should be listed.

**New Companies From External Sources:** Here you can manage settings appertaining to external contacts. For example which source of external contacts (Chamber of Commerce or Yellow Pages) will be retrieved from.

**Project Attributes:** This menu lets you manage attributes appertaining to Projects (Matters).

**Default tab in external sources:** Here you can choose a default tab which opens when searching new contacts from external sources

**Default tab for external sources:** This menu allows for management of default tabs when searching new contacts from external sources.

## 12.3. Calendar

---

### Personal settings > Calendar

**Time settings calendar:** Here you can set the default times for the calendar layout.

**Amount of days in calendar layout:** Here you can indicate how many days you want to display the calendar in the standard layout. In the case of 7 days, a standardised weekly-view will appear. In the case of 30 days, a standardised monthly-view will be shown.

**Interval:** The interval sets the format of your calendar to: 5, 10, 15, 20, 30 or 60 minutes.

**Calendar event layout:** Here you can set the layout of your calendar events. We highly advise you to only apply this setting if you have sample knowledge about our template codes. Appertaining this setting, BaseNet does not support you.

**Default location linking:** When creating calendar events and having this option enabled, the location will be automatically linked. You can choose for the location to be filled in based on the linked contact (in this case the system applies the contact's location/ company address) or the contact of the project. It is also possible to disable this setting. In that case, the system will not fill in a location when linking a project or contact.

**Alternate calendar settings:** Here you can manage alternate calendar settings, such as when a notification for a particular calendar item should appear.

## 12.4. Tasks

---

Personal settings -> Tasks

**The number of default days you wish to search ahead:** If you have a large number of tasks, it may come in handy to set a maximum amount of days to search ahead when it comes to tasks. In that case, you will see an overview of tasks until the number of specified days ahead. When searching you can manually make exceptions to this rule.

**Create task by default when creating concept:** Here you can set whether you wish to create a task right after creating a concept. For example wanting the person you created the concept for to be reminded that they have to look into the concerning concept.

**Send Email notifications regarding tasks which should be ready or which I have created:** These settings can be used to enable Email notifications as soon as your tasks have been completed.

**Displaying warning reminders from the main screen/ dashboard:** Enabling this setting will automatically add a “pop up” reminder in the main screen. This “pop up” message can also show calendar events. A “pop up” notification can also set per individual task.

## 12.5. Hours

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Personal Settings -> Hours

**Amount of office hours per day:** This setting specifies how the hour layout should be displayed from the main menu. If for example “8” is entered here, than the hour layout will not turn “green” until after entering 8 hours.

**Editing existing hours from the multiple hours screen:** When enabling this setting you will be able to revise hours from the multi hours screen. All entered fields will remain untouched. However, this will mean that you can only enter a maximum of fifteen hour fields through the multi hour screen.

**Default description:** This setting allows to add a default description which the system will automatically apply when entering hours. This description can always be manually expanded or removed per hour field.

**Default activities:** This menu is only applicable when using the stopwatch widget. Here you can specify which hour types should be applied to which activities.

**Stopwatch:** Here you can enable and configure the stopwatch widget.

## 12.6. Email

---

**Email accounts** Here you can add Email accounts, and make changes to the settings of Email accounts.

**Email layout** Here you can make changes to the layout of the inbox of Email addresses in BaseNet.

**Email notifications** Here you can make changes to notifications/ warnings.

**Granting full access to Email environments** Through this menu you can grant access to your Email inbox, for example, to allow colleagues to write Emails on your behalf.

**Additional Email Settings** In this menu, you will find a number of options as listed below.

**Always add Bcc to** Here you can add an Email address. The system will then add a Bcc to that Email address after each sent Email.

**Default Email Template** Here you can set a default Email template and also check mark whether the system should automatically fill in the template when composing a new Email or not. The latter is only advisable when using compilation fields as these are not directly linkable.

**Default input** By enabling this option your default template will be automatically added.



We strongly discourage the latter option, because practically, in all situations, a contact and/ or project should first be linked and if the template has been added prior to linking, there is no addressee and title to be added.

**Project linkage; Default, mandatory or warning:** Here you can specify whether the system should create a link by default with new or received Emails.

1. Default – The link is always created
2. Mandatory – A link is necessary for further actions.
3. Warning – You will receive a warning in case the message has not been properly linked.

**Never send a receipt confirmation:** Here you can disable the receipt confirmation option in its entirety.

# 13. Templates

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## Templates in BaseNet's Online CRM

The administrator settings for templates can be found here:

Manage -> Company Settings -> Templates (-> Email, Letters, Memo of Other)

Templates are used in different components in BaseNet. Templates make composing Emails more efficient. This chapter touches upon the development and amendment of templates used for composing Emails, creating letters or faxes.

A template for composing an Email consists of several template codes. These template codes refer to the fields in your system, such as for example the contact to whom the Email is linked. When composing an Email the template loads up aspects of those fields from BaseNet's system and places them in the fields in question, through template codes.



BaseNet offers custom tailored development and amendments to templates against an hourly rate. For more information contact your account manager at BaseNet.



When composing an Email make sure to link a project and/ or contact. Only then will the applicable template fields be automatically filled in.

# 13.1. Predefined Fields and Links

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## Predefined Fields

Predefined Fields lay the foundations towards the desired fields of, for example, a contact or project. There are a number of predefined fields which you should keep in mind when developing or amending a template and these are: \$data.email. Applicable in Email and memo templates.

\$data.letter. Applicable in letter and fax templates.

## Linkages and entities

A contact, project or employee are referred in BaseNet as a so called Entity.

After the mentioned predefined fields, the entity is placed who makes use of those fields. Here are some examples:

relation. For data of the linked contact (private person, individual or company). project. For data from the concerning project. project.relation. For data from the contact (private person, individual or company) of the linked project. employee. For data from the employee who composed the Email.

## Linkage of fields

Once the path towards the proper entity is listed, you can start linking the desired field of this entity. This is done by moving the field name (template code) from the field behind the composed path towards the entity. It is easily traceable which template code has been used for which field. To do so, open, for example, the contact's Rolodex card. In this field, you will find a Nickname field, with a label (here the text 'Nickname' is noted). When moving your cursor over the label, a tool tip appears. This tool tip displays the concerning template code. The template code for surnames is 'firstname'.

Example 14.1. Example of a template code

The code "\$data.email.relation.firstname" consists of the entire path towards the first name and the contact which has been linked to the Email.

If the 'firstname' field has been entered in the Rolodex card of the linked contact in your system, instead of that code, the concerning name will appear in that field when composing an Email.

## Linking your company information

Manage -> Company Settings -> Manage Company Settings

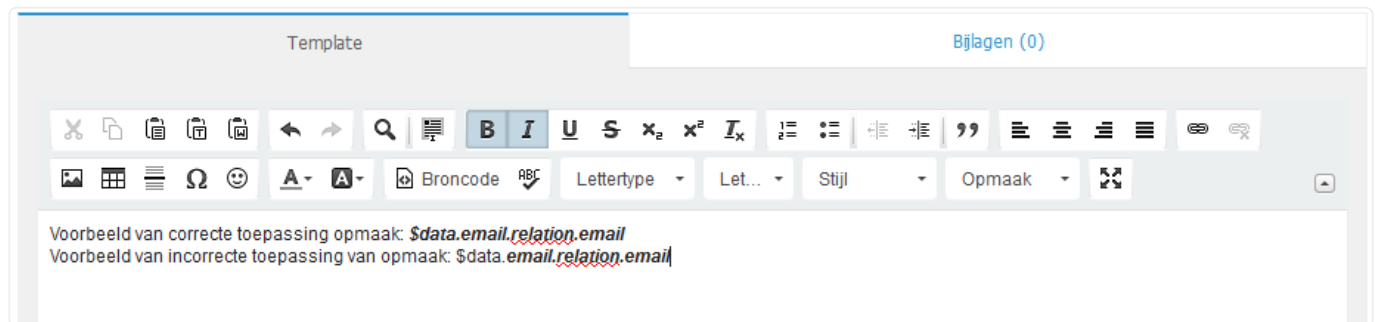
Your company's information can be managed from within your system. This information can be later be retrieved through archived correspondence listings. The path towards this data has been generated based on a predefined field followed by a template code of the desired field.

The predefined field linking to this data is specified as such: \$data.companyInfo.myCompany. This predefined field does not differentiate between Email or letter and these will always remain identical. The template codes for available fields are accessible from the label's tooltip, which appears when moving the cursor above it. The template codes of the most commonly used fields are accessible from the used fields in question. Here you will also find examples of template codes.

## 13.2. HTML Templates

HTML files are used for composing Emails templates as well as memo templates. When composing templates in a HTML (Hyper Text Markup Language) document, template codes can be directly pasted into the text.

Please be aware that when composing a text always assure that the entire code is made up of the required format. Otherwise the template code will not function accordingly.



### 3.1. Creating a new Email template

[Tip] Tip: In many cases it can be useful to make use of examples that are referable in the system. These can be found under the New button as shown in the example.

Manage -> Company Settings -> Templates -> Email -> Click on New. Choose 'Type' for the new template and give this an intelligible name. You may also indicate whether all users within your BaseNet environment should have access to the template or for example only a particular employee or department.

A default subject line can be set if desired. When composing a new Email, this will be automatically filled in.

Under the Template tab, you will fill in desired texts and template codes. Amend the document's formatting and layout if necessary.

Under the Attachment tab, you can add predefined attachments to the template. When composing an Email, this file will be automatically attached to the Email.

Now press the Save or Save/ Close button in order to save your changes. This will be followed by a confirmation screen/ message stating that your data has been saved.

The template is ready to be used. You may test it prior to actual use by composing a new Email. For more information on composing Emails, please refer the Email chapter of this manual.

### 3.2. Revising current Email templates

Manage -> Company Settings -> Templates -> Email -> click on Search. When generating your account, a number of default templates were added. These templates often suffice. Additionally, you may retrieve additional default templates through the New button, as shown in the example. You may, for example, wish to apply a different font or certain outlines based on personal preference. Select the template which you wish to revise and click Edit.

A new window is opened.

Make the desired changes.



Click the Save button or Save/ Close button for the changes to take place.

You will receive a message stating that your changes have been saved.

The template is ready to be used. You may test the template by composing a new Email. For more information on composing Emails, please consult the manual's Email section.

## 13.3. RTF Templates

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RTF files are used for composing letters, faxes, quotations, invoices and reminder templates. When composing a template as an RTF (Rich Text Format) document, the template codes are placed in fields known as Merge Fields. By placing the template code in a merge field the entered code will always keep functioning. When not using merge fields the latter will not be the case.

### 4.1. Developing or Revising Letter Templates

[Tip] Tip: The templates which are used for composing invoices and reminders are accessible through a different screen.

Administration -> Source Data -> Invoice Template

This manual does not yet contain information on revising invoice templates.

[Belangrijk] Important

RTF files are used for composing letters, faxes, quotations, invoices and reminder templates. When composing a template as an RTF (Rich Text Format) document the template codes are placed in fields known as Merge Fields. By placing the template code in a merge field the entered code will always keep functioning. When not using merge fields the latter will not be the case. [Tip] Tip

Merge fields in Word, Office 2003: Choose your default toolbar 'Add/ Insert' and subsequently 'Field'. A new window is opened. Under 'Fieldname', choose 'MergeField'. Under 'FieldProperties', you can add your desired code. Now click OK to add that particular field to your template.

Merge fields in Word, office 2007:

Open the 'Add/ Insert' tab. From the 'Text' field select 'Quick Parts'. Now select the 'Field' option. A new window appears. Under 'Fieldname', select 'MergeField'. Under 'Fieldproperties', you can insert your desired code. Now click OK to add the concerning field to your template.

For more information on using merge fields consult the help function or consult the manual of your word processor.

[Tip] Tip: There are several default templates available for letters, faces, quotations and other types of documents. A number of these have been predefined. You can find additional ones under the New button as shown in the example. These templates can be revised based on your own preferences.

### 4.2. Creating new letter templates

Manage -> Company Settings -> Templates -> Letters -> Click on New

Select a 'type' when creating a new template and assign an intelligible title for future reference.

Specify 'Type' for new template and assign an intelligible name for future reference. You may also specify whether the template should be accessible for all users in your BaseNet environment or limited to for example a particular department or employee.

Create a new .RTF document and save it on your computer's local hard drive in order to be able to easily access it at a later time. Enter your desired texts and template codes. Revise the document's layout if desired and save the file (as an RTF document!) once again.

Return to the 'Email Template Maintenance' screen of the template which you have just revised. Click on

'Browse' behind the 'File' button. Navigate towards the revised source file which you have just worked on and select it. Now click on Save or Save/ Close to make the changes to take affect.

A message will appear stating that your changes have been saved.

The template is ready for use. You may perform a precautionary test by composing a new letter. For more information on composing a letter consult the "Composing a Letter" section of this manual.

#### 4.3. Revising Existing Letter Templates

When generating your BaseNet account a number of default templates were added to your environment. These default templates are suffice in regards to most standards. You may access additional default templates by going to the New button as shown in the example. You may want to use a different font when changing certain margins according to your preferred wishes.

Manage -> Company Settings -> Templates -> Letters -> Click Search

Select the templates which you wish to revise and click Edit.

A new window appears. Click the Download Template button and save the template's source file on your computer's local hard drive in order to be able to easily access it at a later time. Open the file with for example Microsoft Word.

Make the desired changes and save the new source file. When doing this make sure to save using the .RTF file extension.

Return to the 'Letter Template Maintenance' screen of the template which you have just edited. Click on the 'Browse' button next to the 'File' label. Navigate towards the source file which you have edited and select it. Now click on Save or Save/ Close in order to make the changes to take place.

A message appears confirming that the changes have been saved.

The template is ready to be used. You may want to test the template first by composing a new Letter. For more information on composing Letters consult this manual's Letter article.

## 13.4. Template Code Examples

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Here you will find a number of commonly used template codes from several entities (contacts, projects, employees, etc.). Not all template codes are listed here. The tool tips which appear when moving the cursor above each label will list certain desired template codes. Also refer to field links.

The first two overviews will list template codes that are related to your correspondence item (Email or Letter/ Fax).

### 5.1. Template codes for Email

`$data.email.subject` The Email's subject which you have specified.

`$data.email.to` Displays the contents of the 'To' field.

`$data.email.cc` Displays the contents of the 'Cc' field.

`$data.email.bcc` Displays the contents of the 'Bcc' field.

In the contact (Rolodex) card you can set certain data to appear in correspondence by default. Insert the desired template code in the concerning template field.

When composing an Email, Letter or Fax, link the contact person (individual or private) to the addressee

When composing a new Email, Letter or Fax, the contact (private or personal) should be linked to the addressee of the correspondence. The template codes of the template will then be replaced by the ones of the concerning contact.

### 5.2. Contact's template codes for Email

[Belangrijk] Important

The template codes should be used in combination with predefined '`$data.letter.`' or '`$data.email.`'.

For instance: '`$data.letter.relation.initials`' or '`$data.email.relation.initials`'.

`$data.email.relation.initials` The contact's initials.

`$data.email.relation.firstname` The contact's first name.

`$data.email.relation.middlename` The contact's name insertion.

`$data.email.relation.lastname` The contact's surname.

`$data.email.relation.fullname` The contact's complete name (birthname).

`$data.email.relation.christianname` All first names/ nicknames of the contact.

`$data.email.relation.title` The contact's title (prefix), for example Mr.

`$data.email.relation.surttitle` The contact's title (suffix), for example PhD.

\$data.email.relation.sex The contact's specified sex.

\$data.email.relation.birthday.format.date The contact's date of birth.

\$data.email.relation.borncity The contact's place of birth.

\$data.email.relation.hstreet The contact's street name and address type.

\$data.email.relation.hhouseeno The contact's private street number.

\$data.email.relation.hhousenoext The contact's private street number suffix, for example Bond Street 1-A.

\$data.email.relation.hzipcode The contact's private postcode.

\$data.email.relation.hcity The contact's private home town.

\$data.email.relation.tel2 The contact's private phone number.

\$data.email.relation.mobile The contact's private cell phone number.

\$data.email.relation.tel1 The contact's office phone number.

\$data.email.relation.email The contact's Email address.

\$data.email.relation.fax The contact's fax number.

\$data.email.relation.functdescr The contact's job description.

\$data.email.relation.homepage The contact's website address/ URL.

\$data.email.relation.rcode The contact's contact-code.

### 5.3. Template codes of projects for Email

Entered data can be set to automatically appear in your correspondence. Insert the desired template code in the proper template field. When composing an Email, Letter or Fax, link the project to which you wish the correspondence to be linked. When composing the Email, (or other form of correspondence) the template code will be replaced by data from the project.

\$data.email.project.pshdescr The project's description

\$data.email.project.pcode The project code.

\$data.email.project.pstatus The project status.

\$data.email.project.pdatestart.format.date The date on which the project was entered into the system.

`$data.email.project.plastupd` The most recent date on which the project was updated, including hours and minutes.

`$data.email.project.plaunchdate.format.date` Start date of project.

`$data.email.project.pdateend.format.date` Completion date of project.

`$data.email.project.pmaxhours` Maximum hours to be spent on project.

`$data.email.project.phours` Estimated hours for the project.

`$data.email.project.employee.fullname` Account manager of the project.

`$data.email.project.interneMedewerker.fullname` Responsible employee of project.

#### 5.4. Template codes of matters for an Email

The information which has been entered in the matter page and linked contacts can be set to automatically appear in your correspondence. Place the desired template code in the proper template field. When composing an Email, Letter or Fax, link the desired matter. The template codes will be replaced with the matter's data when composing correspondence.

`$data.email.project.linkedEntity.pshdescr` Matter description.

`$data.email.project.linkedEntity.docode` Matter code.

`$data.email.project.linkedEntity.responsibleAccountmanager` Responsible solicitor.

`$data.email.project.linkedEntity.accountmanager` Lawyer on case.

`$data.email.project.linkedEntity.dodatein.format.date` Date on which the matter was entered.

Client data:

`$data.email.project.linkedEntity.relation.company` Company name.

`$data.email.project.linkedEntity.relation.relationName` Client name.

`$data.email.project.linkedEntity.relation.address.addressLine` Address.

`$data.email.project.linkedEntity.relation.address.zipCode` Postcode.

`$data.email.project.linkedEntity.relation.tel1` Phone number.

`$data.email.project.linkedEntity.relation.mobile` Cell phone number.

`$data.email.project.linkedEntity.relation.fax` Fax number.

\$data.email.project.linkedEntity.relation.email Email address.

Counter party data:

\$data.email.project.linkedEntity.wederpartij.relationName Name.

\$data.email.project.linkedEntity.wederpartij.address.addressLine Address.

\$data.email.project.linkedEntity.wederpartij.address.zipCode PostCode.

\$data.email.project.linkedEntity.wederpartij.address.city Town.

Data of counter party's solicitor:

\$data.email.project.linkedEntity.dorefweder Reference counter party.

\$data.email.project.linkedEntity.wederpartijAdvocaat.company Office name.

\$data.email.project.linkedEntity.wederpartijAdvocaat.relationName solicitor.

\$data.email.project.linkedEntity.wederpartijAdvocaat.address.addressLine Address.

\$data.email.project.linkedEntity.wederpartijAdvocaat.address.zipCode PostCode.

\$data.email.project.linkedEntity.wederpartijAdvocaat.address.city Place.

\$data.email.project.linkedEntity.wederpartijAdvocaat.tel1 Phone number.

\$data.email.project.linkedEntity.wederpartijAdvocaat.fax Fax number.

\$data.email.project.linkedEntity.wederpartijAdvocaat.mobile Cell phone number.

\$data.email.project.linkedEntity.wederpartijAdvocaat.email Email address.

## 5.5. Template codes of employees in regards to Email

\$data.email.employee.initials Employee's initials.

\$data.email.employee.firstname Employee's first name.

\$data.email.employee.middlename Suffix of employee's surname.

\$data.email.employee.lastname Employee's surname.

\$data.email.employee.fullname Employee's birth name (complete full name).

\$data.email.employee.christianname Employee's complete first name(s).

\$data.email.employee.title Employee's title.

\$data.email.employee.surtitle Employee's suffix title (PhD/BA/MA, etc.).

\$data.email.employee.sex Employee's specified sex.

\$data.email.employee.birthday.format.date Employee's date of birth.

\$data.email.employee.rbirthcity Employee's place of birth.

\$data.email.employee.hstreet Employee's private street name.

\$data.email.employee.hhouseno Employee's private street number.

\$data.email.employee.hhousenoext Employee's private street number addition.

\$data.email.employee.hzipcode Employee's private postcode.

\$data.email.employee.hcity Employee's (private) home town.

\$data.email.employee.tel2 Employee's private phone number.

\$data.email.employee.mobile Employee's private cell phone number.

\$data.email.employee.tel1 Employee's office phone number.

\$data.email.employee.email Employee's Email address.

\$data.email.employee.fax Employee's fax number.

\$data.email.employee.functdescr Employee's job description.

\$data.email.employee.homepage Employee's web address/ URL.

\$data.email.employee.rcode Employee's contact code.

## 5.6. Template codes for letter/ fax

\$data.letter.lesubject The Email subject which you have specified.

\$data.letter.leref The reference number of the correspondence item. This number is automatically generated when creating new correspondence items and linked.

\$data.letter.letterno The correspondence number of this correspondence piece. this number is automatically generated when creating the new correspondence item and linked.

\$util.proper(\$data.letter.employee.ocity) The company's town, from the employee's address data (logged



in user in BaseNet's Online CRM) who created the correspondence item.

`$data.letter.ledate.format.longdate` The creation date of the correspondence item with the month fully spelled out. This date is automatically added when the new correspondence item is created and linked.

`$data.letter.leauteur` The initials, with first letter of employee's surname (logged in user in BaseNet's Online CRM) who created the correspondence item.

The initials with the first letter of the surname of the employee (logged in BaseNet user) who composes the correspondence item.

## 5.7. Template codes for contacts in regards to Letter/ Fax

Data which has been entered in the contact card (Rolodex card) can be set to automatically appear in your correspondence. Place the desired template code in the desired template field.

Link the contact to whom you are addressing the Email, Letter or Fax. The template codes in the template will be replaced with the correspondence contact when composing.

`$data.letter.relation.initials` Contact's initials.

`$data.letter.relation.firstname` Contact's first name/ nickname.

`$data.letter.relation.middlename` Contact's surname insertion/ prefix.

`$data.letter.relation.lastname` Contact's surname.

`$data.letter.relation.fullname` Contact's complete name, spelled out.

`$data.letter.relation.christiannname` Contact's first names (all).

`$data.letter.relation.title` Contact's prefix title (Mr./Ms.).

`$data.letter.relation.surttitle` Contact's suffix title (BA/MA/PhD).

`$data.letter.relation.sex` Contact's specified sex.

`$data.letter.relation.birthday.format.date` Contact's date of birth.

`$data.letter.relation.borncity` Contact's place of birth.

`$data.letter.relation.hstreet` Contact's private street name.

`$data.letter.relation.hhouseno` Contact's private street number.

`$data.letter.relation.hhousenoext` Contact's private street number's suffix (i.e. 45-A).

`$data.letter.relation.hzipcode` Contact's private postcode.

\$data.letter.relation.hcity Contact's private home town.

\$data.letter.relation.tel2 Contact's private phone number.

\$data.letter.relation.mobile Contact's private cell phone number.

\$data.letter.relation.tel1 Contact's office phone number.

\$data.letter.relation.email Contact's Email address.

\$data.letter.relation.fax Contact's fax number.

\$data.letter.relation.functdescr Contact's job description.

\$data.letter.relation.homepage Contact's office address.

\$data.letter.relation.rcode Contact's contact code.

#### 5.8. Template codes of contact in regards to letter/ fax Template codes of project for letter/ fax

Data which has been entered into a project can be set to reappear in your correspondence. Place the desired template code in the intended template field. When composing an Email, letter or fax, link the project which you wish to link to the correspondence. The template codes in the template will be replaced with the data from the project when composing.

\$data.letter.project.pshdescr Project's description.

\$data.letter.project.pcode Project code.

\$data.letter.project.pstatus Project status.

\$data.letter.project.pdatestart.format.date Date on which the project has been entered into the system.

\$data.letter.project.plastupd Most recent date on which the project was updated, including hours and minutes.

\$data.letter.project.plastupd.format.date Date on which the project was edited last.

\$data.letter.project.plaunchdate.format.date Project's initiation date.

\$data.letter.project.pdateend.format.date Project's completion date.

\$data.letter.project.pmaxhours Maximum hours spent on project.

\$data.letter.project.phours Estimated amount of hours for project.

\$data.letter.project.employee.fullname Project's account manager.

`$data.letter.project.interneMedewerker.fullname` Employee responsible for project.

#### 5.9. Template code for matter in regards to letter/ fax

The data entered into the matter can be set to reappear in correspondence with linked contacts. Insert the desired template code in the concerning template field. When composing an Email, letter or fax, link the desired matter. The template code in the template will be replaced with the matter's contents when composing a correspondence item.

`$data.letter.project.linkedEntity.pshdescr` Matter description.

`$data.letter.project.linkedEntity.docode` Matter code.

`$data.letter.project.linkedEntity.responsibleAccountmanager` Solicitor responsible.

`$data.letter.project.linkedEntity.accountmanager` Solicitor on case.

`$data.letter.project.linkedEntity.dodatein.format.date` Date on which matter was entered.

Client data:

`$data.letter.project.linkedEntity.relation.company` Company name.

`$data.letter.project.linkedEntity.relation.relationName` Client name.

`$data.letter.project.linkedEntity.relation.address.addressLine` Address.

`$data.letter.project.linkedEntity.relation.address.zipCode` Postcode.

`$data.letter.project.linkedEntity.relation.tel1` Phone number.

`$data.letter.project.linkedEntity.relation.mobile` Cell phone number.

`$data.letter.project.linkedEntity.relation.fax` Fax number.

`$data.letter.project.linkedEntity.relation.email` Email address.

Data appertaining to counter party:

`$data.letter.project.linkedEntity.wederpartij.relationName` Name.

`$data.letter.project.linkedEntity.wederpartij.address.addressLine` Address.

`$data.letter.project.linkedEntity.wederpartij.address.zipCode` Postcode.

`$data.letter.project.linkedEntity.wederpartij.address.city` Place.

Data appertaining to solicitor of counter party:

\$data.letter.project.linkedEntity.dorefweder Counter party reference.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.company Office name.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.relationName Solicitor.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.address.addressLine Address.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.address.zipCode Postcode.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.address.city Place.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.tel1 Phone number.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.fax Fax number.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.mobile Cell phone number.

\$data.letter.project.linkedEntity.wederpartijAdvocaat.email Email address.

#### 5.10. Templatecodes van medewerkers voor een brief / fax

\$data.letter.employee.initials Employee's initials.

\$data.letter.employee.firstname Employee's first name.

\$data.letter.employee.middlename Employee's surname insertion/ surname's prefix.

\$data.letter.employee.lastname Employee's surname.

\$data.letter.employee.fullname Employee's complete name (spelled out).

\$data.letter.employee.christiannname Complete first name(s) of employee.

\$data.letter.employee.title Employee's prefix title (i.e. Mr./Ms./Dr.).

\$data.letter.employee.surttitle Employee's suffix title (i.e. BA/MA/PhD).

\$data.letter.employee.sex Employee's assigned sex.

\$data.letter.employee.birthday.format.date Employee's date of birth.

\$data.letter.employee.rbirthcity Employee's place of birth.

\$data.letter.employee.hstreet Employee's private street name.

`$data.letter.employee.hhouseno` Employee's private street number.

`$data.letter.employee.hhousenoext` Employee's private street number usffix (i.e. 45-A).

`$data.letter.employee.hzipcode` Employee's private postcode.

`$data.letter.employee.hcity` Employee's home town.

`$data.letter.employee.tel2` Employee's private phone number.

`$data.letter.employee.mobile` Employee's cell phone number.

`$data.letter.employee.tel1` Employee's office phone number.

`$data.letter.employee.email` Employee's Email address.

`$data.letter.employee.fax` Employee's fax number.

`$data.letter.employee.functdescr` Employee's job description.

`$data.letter.employee.homepage` Employee's web address/ URL.

`$data.letter.employee.rcode` Employee's contact code.

#### 5.11. Template codes for date in regards to Email/ Letter/ Fax

Date will be shown behind template code based on following format: 01-01-2012 at 09:00.

`$data.now.format.date` 01-01-2012.

`$data.now.format.longdate` January 1st 2012.

`$data.now.format.fulldatetime` Sunday, 1 January 2012 09:00.

`$data.now.format.verylongdutchdateDMY` one january two thousand and twelve.

#### 5.12. Template codes for company data

You can set for company data to automatically reappear in your correspondence. Place the desired template code in the assigned template field. The template codes in the template will turn into company related data when composing correspondence items.

[Belangrijk] Important

Template codes should be used without applying a predefined field.

Bijvoorbeeld: '`$data.companyInfo.mijnbedrijf.compname`'.

\$data.companyInfo.mijnBedrijf.compname Company name.

\$data.companyInfo.mijnBedrijf.compstreet Street name of physical address.

\$data.companyInfo.mijnBedrijf.compstreet2 2nd address name of physical address.

\$data.companyInfo.mijnBedrijf.comphousenr Street number of physical address.

\$data.companyInfo.mijnBedrijf.comphousenrext Street number suffix of physical address (i.e. 45-A).

\$data.companyInfo.mijnBedrijf.compzipcode Postcode of physical address.

\$data.companyInfo.mijnBedrijf.compplaats City/ town of physical address.

\$data.companyInfo.mijnBedrijf.compprovincie Province/ Region of physical address.

\$data.companyInfo.mijnBedrijf.compcountry Country of physical address.

\$data.companyInfo.mijnBedrijf.comppoststreet Street name or P.O. Box of physical address.

\$data.companyInfo.mijnBedrijf.compposthousenr Street number of postal address.

\$data.companyInfo.mijnBedrijf.compposthousenrext Street number suffix of postal address (i.e. 45-A)..

\$data.companyInfo.mijnBedrijf.comppoststreet2 2nd address line of postal address.

\$data.companyInfo.mijnBedrijf.comppostbzipcode Postcode of postal address.

\$data.companyInfo.mijnBedrijf.comppostbcity City/ Town name of postal address.

\$data.companyInfo.mijnBedrijf.comppostprovincie Province/ Region of postal address.

\$data.companyInfo.mijnBedrijf.comppostcountry Country of postal address.

\$data.companyInfo.mijnBedrijf.comptel Company phone number.

\$data.companyInfo.mijnBedrijf.compfax Company fax number.

\$data.companyInfo.mijnBedrijf.compemail Company Email address.

\$data.companyInfo.mijnBedrijf.compurl Company web address/ URL.

\$data.companyInfo.mijnBedrijf.compbank Company bank account number.

\$data.companyInfo.mijnBedrijf.compbankname Company bank name.

\$data.companyInfo.mijnBedrijf.compbankcity Company bank city/ town.

`$data.companyInfo.mijnBedrijf.compkvknummer` Company's Chamber of Commerce ID number.

`$data.companyInfo.mijnBedrijf.compkvkcity` City/ Town of Chamber of Commerce registration.

`$data.companyInfo.mijnBedrijf.compbtwnummer` Company Tax ID.

`$data.companyInfo.mijnBedrijf.compinfo` Open field for adding slogan.

## 14. Configuring Microsoft Office Online (requires update)

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Internal note: there's an update of the BaseNet Office Online applet

E-mail template Template: ServiceDesk -> Bevestiging en uitleg Office Online Koppeling

\*\*\*\*\*

## Configuring Microsoft Online in combination with BaseNet.

### User Settings

In order to enable revising documents from Office Online, the user should have the following settings:


**-USE\_NEW\_OFFICE\_ONLINE**

### Settings for revising documents

To set Microsoft Online as default word processor go to "Settings -> Document Editing Settings". The following screen appears:



Document editing settings [environment: basenet\_dev\_doc]



Location

BaseNet Projects

User

John Espana

Open documents in tab by default:

☒ Edit document

☐ Download/Upload

Settings

☒ Edit document (Office Online)

☐ Disable linking

☐ Edit document (new version)

**LET OP:**

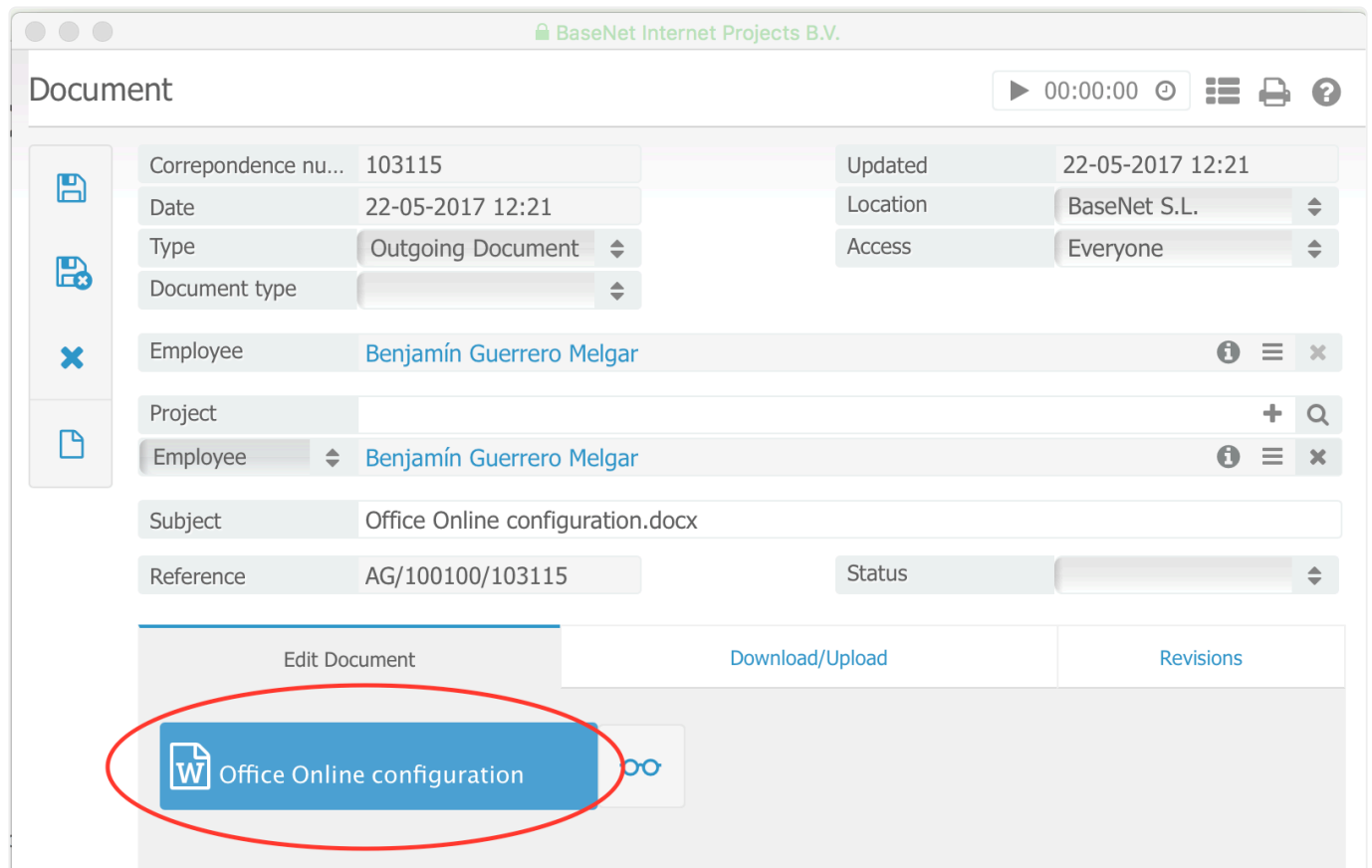
Bij sommige gebruikers kan het gebeuren dat de werking van de koppeling door bepaalde instellingen op de computer beïnvloed wordt. Zo kan het in sommige gevallen lijken dat uw document vanaf de server geopend wordt, maar dat er in werkelijkheid een kopie (als tijdelijk bestand of alleen lezen) vanaf de eigen computer geopend wordt. Als u het document dan (tussentijds) bewaart gebeurt dit niet op de server maar op de eigen computer (vaak in een map genaamd TEMP).

Mocht u het gevoel hebben dat de koppeling niet naar behoren werkt op uw computer, neemt u dan contact op met onze servicedesk.

Here choose “Edit document”/“Edit Document”and “Edit document(Office online)”/“Edit document (Office online)”.

## Edit document

As soon as everything has been properly set we can start using this functionality. When going to a document screen, you will see the following:



Document

00:00:00

Correspondence nu... 103115 Updated 22-05-2017 12:21

Date 22-05-2017 12:21 Location BaseNet S.L.

Type Outgoing Document Access Everyone

Document type

Employee Benjamín Guerrero Melgar

Project

Employee Benjamín Guerrero Melgar

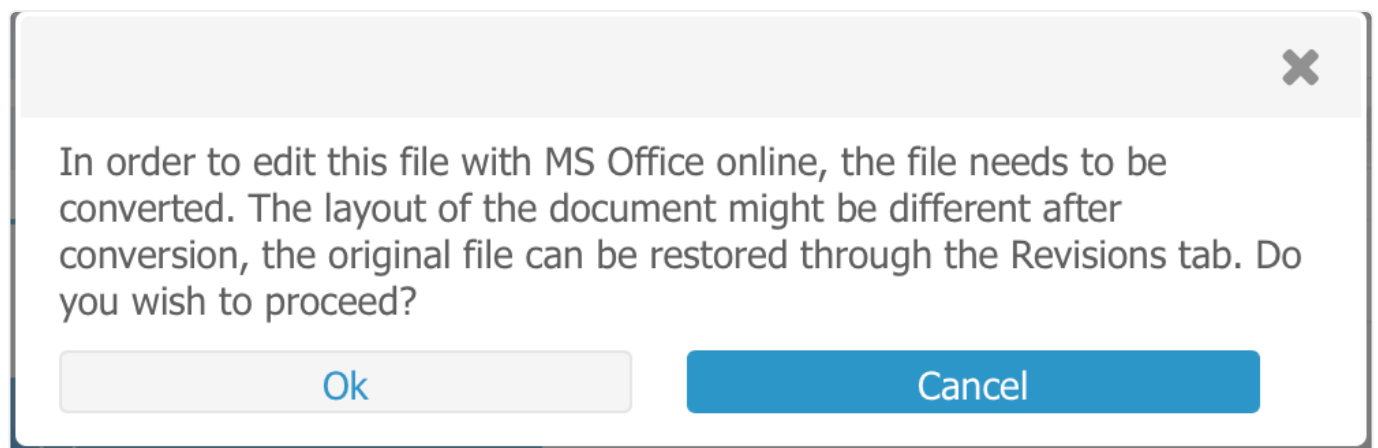
Subject Office Online configuration.docx

Reference AG/100100/103115 Status

Edit Document Download/Upload Revisions

Office Online configuration

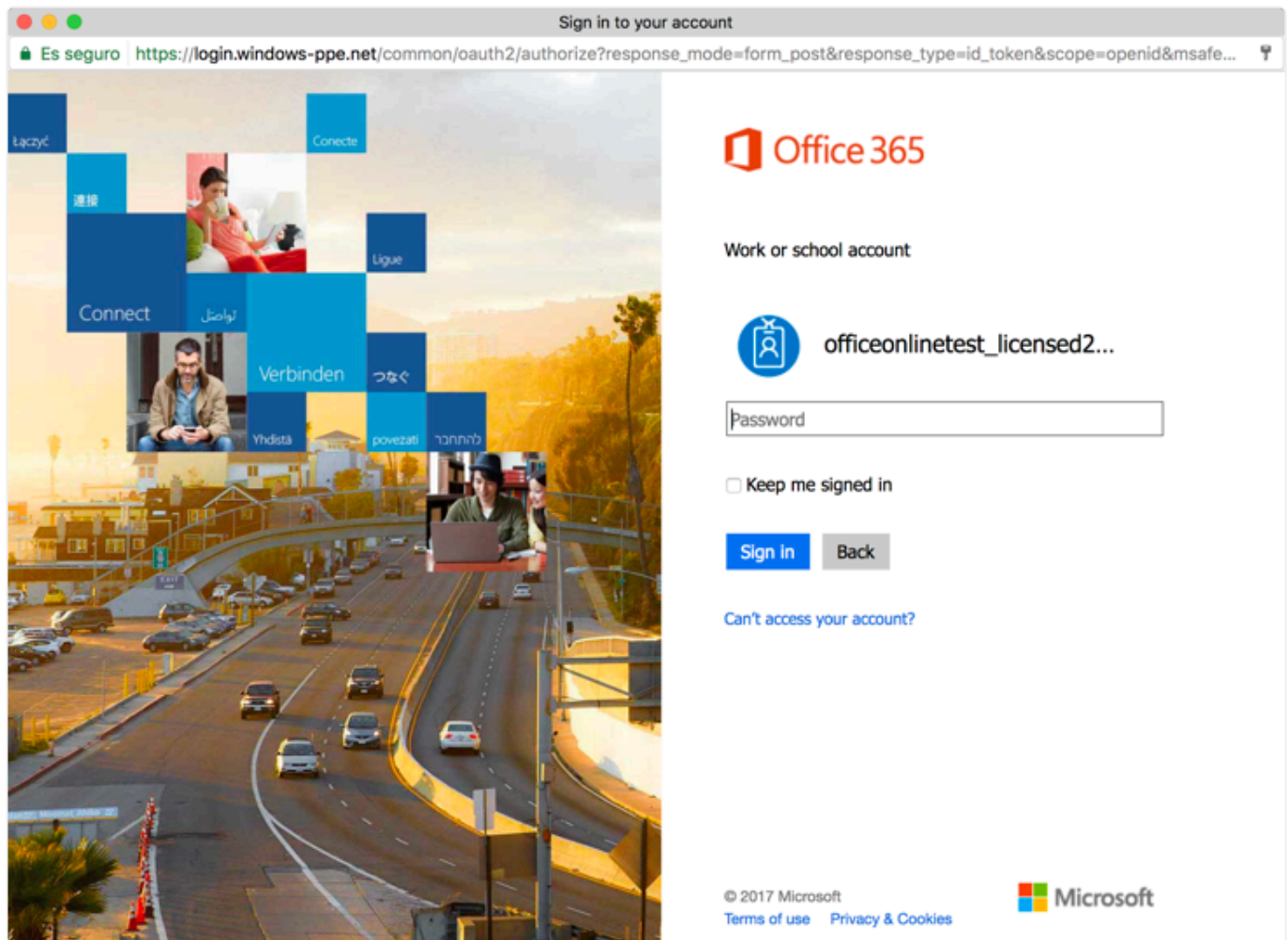
In this screen, we click the blue button in order to open a new window in which the document can be revised. If the document consists of an old document layout, the user will see a pop-up screen asking whether the document may be converted to a newer format such as Docx or XLSX:



In order to edit this file with MS Office online, the file needs to be converted. The layout of the document might be different after conversion, the original file can be restored through the Revisions tab. Do you wish to proceed?

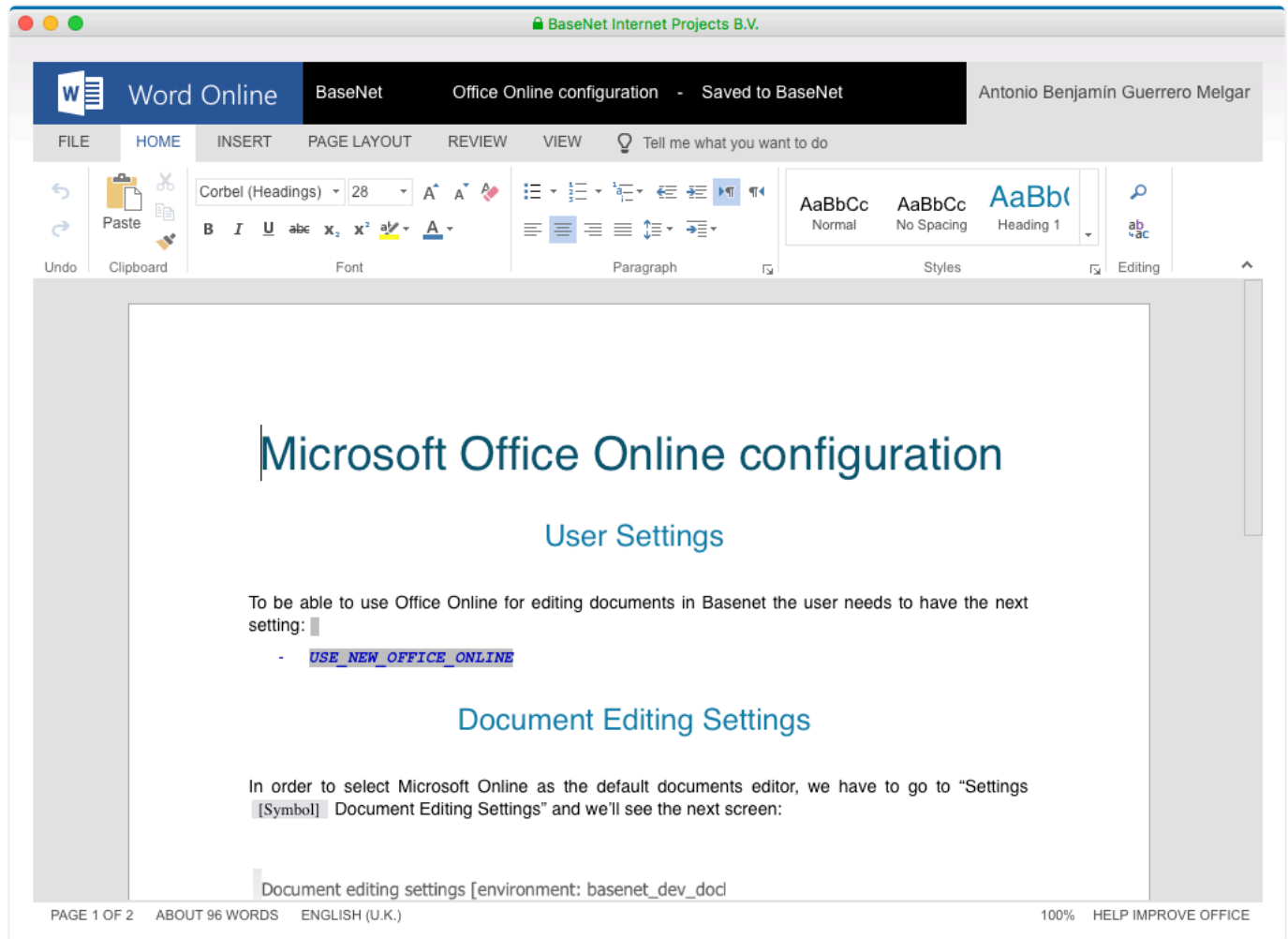
Ok Cancel

After opting for the latter option, a new window is opened asking whether a login session may be started with a valid Online 365 license:



If the user opts for “Keep me signed in” by checking that box, the above mentioned step will appear less often.

As soon as the user logs in onto the Microsoft Account, the screen will automatically switch to “edit” mode:



As soon as the document has been opened, the user can directly start making revisions. Please keep in mind that the user will not have a “Save” button in Office Online and that all changes will be immediately saved.

## Co-authorship within Office Online

One of the most powerful features within Office Online is the possibility to allow several user to simultaneously open a document, preventing the exclusion of a user in case the document has already been opened.

When opening a document at the same time as another user, both changes will be applied to the document.

The screenshot displays the Microsoft Word Online interface within a web browser. The title bar at the top indicates 'BaseNet Internet Projects B.V.'. The Word ribbon is visible, with the 'HOME' tab selected. The document title is 'Office Online configuration - Saved to BaseNet'. The user's name, 'Antonio Benjamin Guerrero Melgar', is shown in the top right corner. A notification bar at the top right states 'Adis Ferusic Guja is also editing'. The main content area contains the following text:

# Microsoft Office Online configuration

## User Settings

To be able to use Office Online for editing documents in Basenet the user needs to have the next setting:

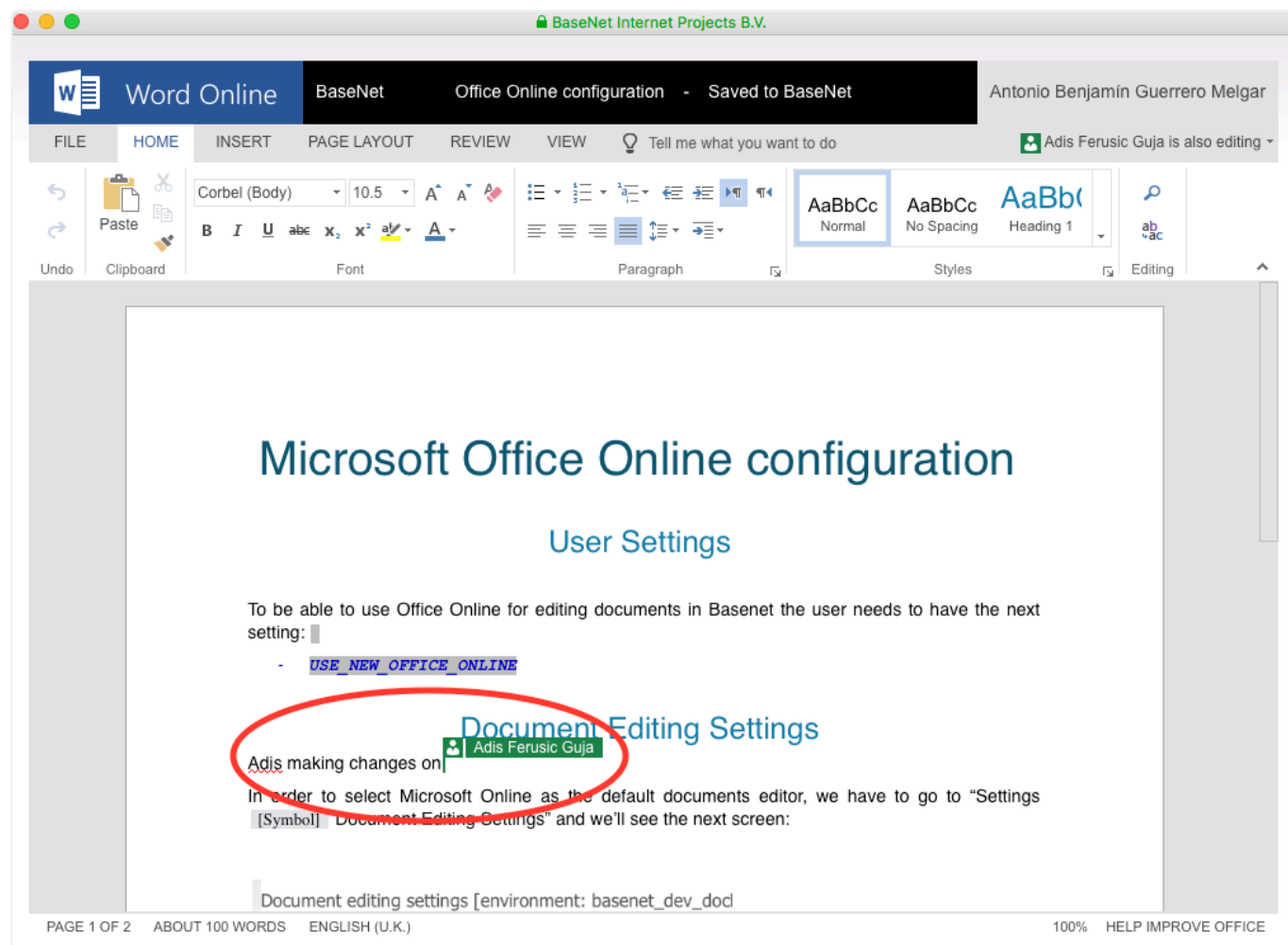
- [USE\\_NEW\\_OFFICE\\_ONLINE](#)

## Document Editing Settings

In order to select Microsoft Online as the default documents editor, we have to go to "Settings [Symbol] Document Editing Settings" and we'll see the next screen:

Document editing settings [environment: basenet\_dev\_dod]

The status bar at the bottom shows 'PAGE 1 OF 2', 'ABOUT 96 WORDS', 'ENGLISH (U.K.)', '100%', and 'HELP IMPROVE OFFICE'.



If one of the users closes a session (closes the document), the other user can continue to work on the document, even if not having opened the document first.