

Lytecube Technologies

EnCircle Automation

User Guide

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Installation

Download the EnCircle setup file from www.lytecube.com/encircle
Refer to [System Requirements](#) before launching the installer
Follow the onscreen instructions to complete installation

Using Encircle

Launching EnCircle as a desktop application

Double click on the EnCircle icon on the desktop to launch the application

Logon Screen

You need to provide a valid username and password to access the EnCircle system. First time users refer to the [security](#) section to obtain a valid username/password.

EnCircle Home Screen

The Home Screen is a launch pad for various modules in EnCircle. You can hover over a button to get a quick overview of a module. Click on a button to launch a module.



Start As WebService

The Tools menu in the Home Screen also allows you to start the application as a web service for remote access over the intranet or over the internet.

Contact Manager

Contact manager is a centralized repository of all your contact information from vendors to customer.

Adding new contacts

Click on the new contact button in the top menu to add new contact information. Some fields like title are pre-populated with values; you can select a value from the drop down box. If you do not find the value that you want, you can create a new value by simply typing inside the drop down box area.

If you enter a new value in the company/department/role fields, a new window will open to gather further dependant information.

Finding contacts

You can type part of a name or company in the quick find box to locate information. You can also group your contacts by company or department for easy location.

Advanced Search

Clicking on the search button at the bottom will open the advanced query wizard, where you can specify complex queries like find contacts where email contains yahoo* and name begins with jack*. You can also use the sort and group by clause when there are too many results.



Company View

The contacts manager home page has a company view button where you can browse contacts by company and locate people in specific departments.

Print view and reports

The reports menu has a variety of printable reports of contacts. You can preview by selecting one and using the page navigation buttons at the bottom of the panel.

Quitting Contact Manager

You can quit this module by closing the window or selecting quit from the application menu bar.

Activity Tracker

The ActivityTracker is a tool to capture any form of interaction between your customers. The opening page is a summary view of your current activities.

Creating a new activity

You can capture the details of phone calls, emails or meetings by clicking new activity. If you cannot find a value in the dropdown boxes, you can type a new value and the dependant information will be created.



Search for activities

Click on the search activities button will launch the spreadsheet view of all activities, you can further filter or use the search bar to locate information.

Quick find

You can quickly locate records by typing part of a name or any key word that has been captured in the text find box.

Advanced Search

Clicking on the search button at the bottom will open the advanced query wizard, where you can specify complex queries like find activity where type is meeting and name begins with jack*. You can also use the sort and group by clause when there are too many results.

Prioritised View

The priority view is useful tool to view activities by priority.

Accessing over the Intranet (LAN)

To access EnCircle over a LAN or intranet, open your web browser and goto the URL of the encircle service. Example: <http://192.168.1.1:8085>

Accessing over the Internet (www)

To access EnCircle from the internet you will have to do the following

1. Configure your firewall to allow incoming and outbound TCP connections on port 9095
2. You will need a LyteBridge account to make your computer discoverable.
3. Logon to LyteBridge.com/<account-name> and provide your authentication token
4. Select the application you wish to view.

Security

You need to have a valid username and password to access the EnCircle system. The first time you launch the application you can login using the administrator username 'admin' and password 'admin'. Do remember to change the administrator password for security reasons. You can create as many users as necessary from [user administration](#).

Creating Users and Roles
