



# General documentation

Livits

Version management:

Versie 1.0

01-06-2023

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*This manual is based on the standard operation of the relevant module and is revised annually. Interim changes are not processed immediately, therefore there may be deviations in the description. Please contact Livits support if you have any questions about this.*

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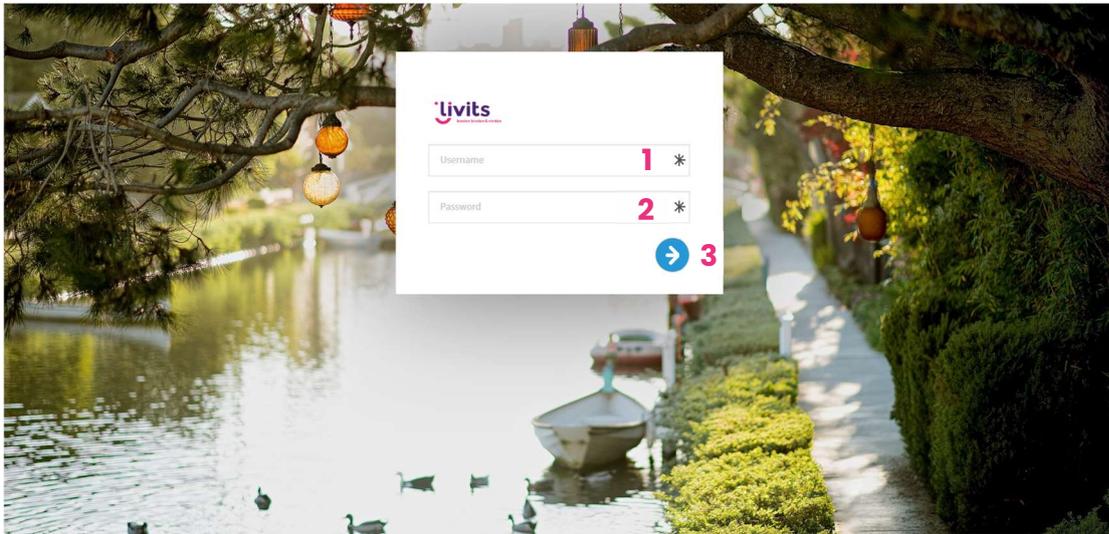


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## 1. Login

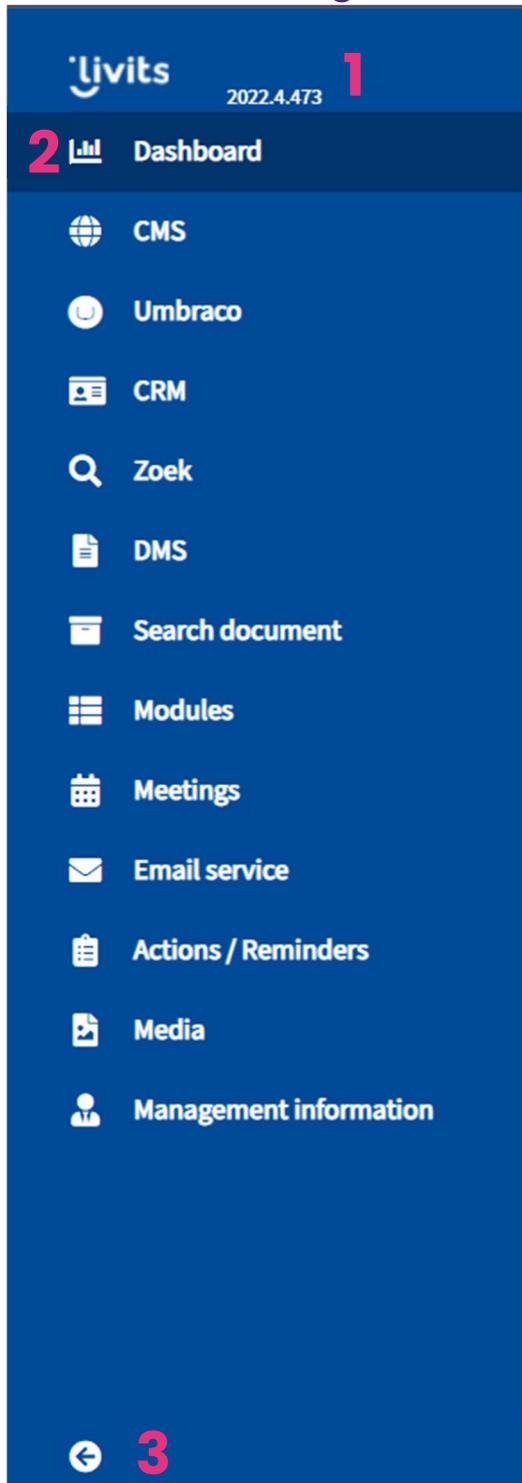
### 1.1. Log in with username and passwords

When you start the software, a login screen like the one below will pop up. Fill in your username (1) and password (2) and press the login button (3).



The background of the login screen will be renewed every release with another image.

## 2. General navigation

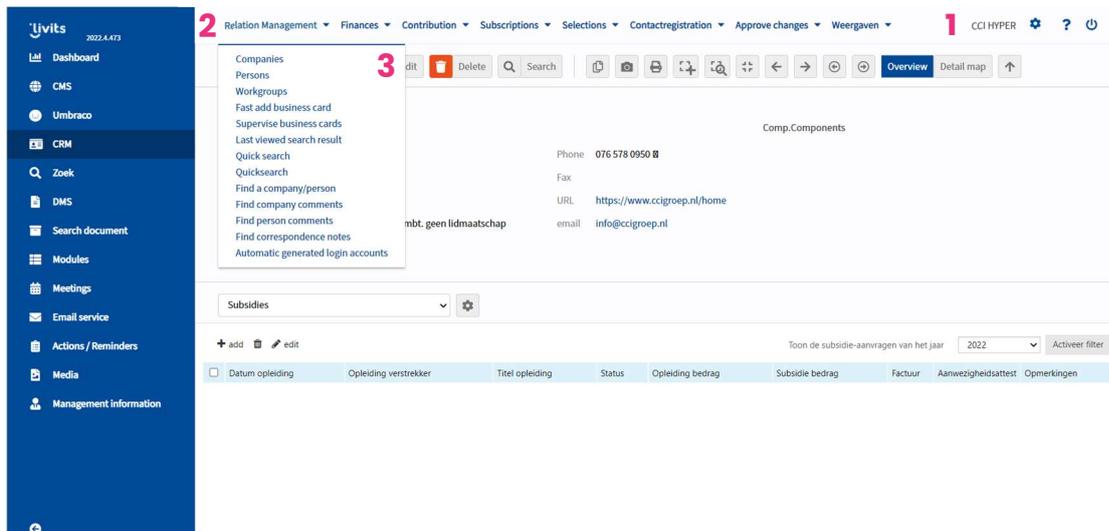


In the newest version of Livits, the tabs have moved to the menu on the left side of the screen. You will find the menu of Livits with the options you are accustomed to see in Livits.

1. At 1. You will find the version number of the current Livits version.

2. Below 2, you can find all main menu items. Depending on your rights your environment might show fewer options when you login.

3. When pressing the arrow (3), the menu collapses and only the icons of the main menu options are visible. Folding the menu ensures that your work area is expanding, and you have more room to work in Livits.



1. In the image above you see your username (1) once you're logged in. On the right side of your username, you can find the log out button.
2. The menu items can be found on the top of the screen. These options are bold, like shown at 2.

When you hover over the buttons, you can see that the drop-down menus become visible by which you can use to navigate through the system.

3. In the example above (3) you see the drop-down menu for 'Relation Management' by which you can approach the options for companies, individuals, working groups and others.

### 3. CRM – Company's

1 Relation Management | Finances | Contribution | Subscriptions | Selections | Contactregistration | Approve changes | Weergaven

Companies **3** + Add Edit Delete Search **2** Overview Detail map

CCI Groep  
 Company name CCI Groep  
 Postal Address Bijster 18, 4817 HX, Breda  
 Country Nederland  
 Contact person  
 Member status Configuratie tekst bedrijf mbt. geen lidmaatschap  
 Taal Nederlands

4 Employees  
 + Add Edit Delete Department Show only active employees Activate

<input type="checkbox"/>	Name	HF	Function classification	Business card	Active	Extension No.	Mobile	E-mail	Remarks	Member
<input type="checkbox"/>	mevrouw (Sabrina) Boetzkes			Customer Care	<input checked="" type="checkbox"/>			sabrina.boetzkes@ccigroep.nl		
<input type="checkbox"/>	de heer (Robert) Borghuis				<input checked="" type="checkbox"/>			robert@ccigroep.nl		
<input type="checkbox"/>	CCI HYPER				<input checked="" type="checkbox"/>					
<input type="checkbox"/>	de heer D. (Donny) Langerak				<input checked="" type="checkbox"/>			donny@ccigroep.nl		
<input type="checkbox"/>	de heer (Colin) Suijkerbuijk				<input checked="" type="checkbox"/>					
<input type="checkbox"/>	de heer (Pieter) Willemssen	<input checked="" type="checkbox"/>		Account Manager	<input checked="" type="checkbox"/>			donny@ccigroep.nl		

5

1. When you hover over the menu options at the top of your screen, you will see the functionalities of the concerning module. In the shown image, the option 'Companies' is chosen within the CRM module. The last viewed company will be shown.
2. With the magnifier you can search a company.
3. With add you can add a new company
4. With the top-down, you can view previous choices.
5. In the example you can see the staff members of this company featured. From this tab you can click on the name of the staff member and see the data from the person.

Through the dropdown (4) you can find the menu with other options.

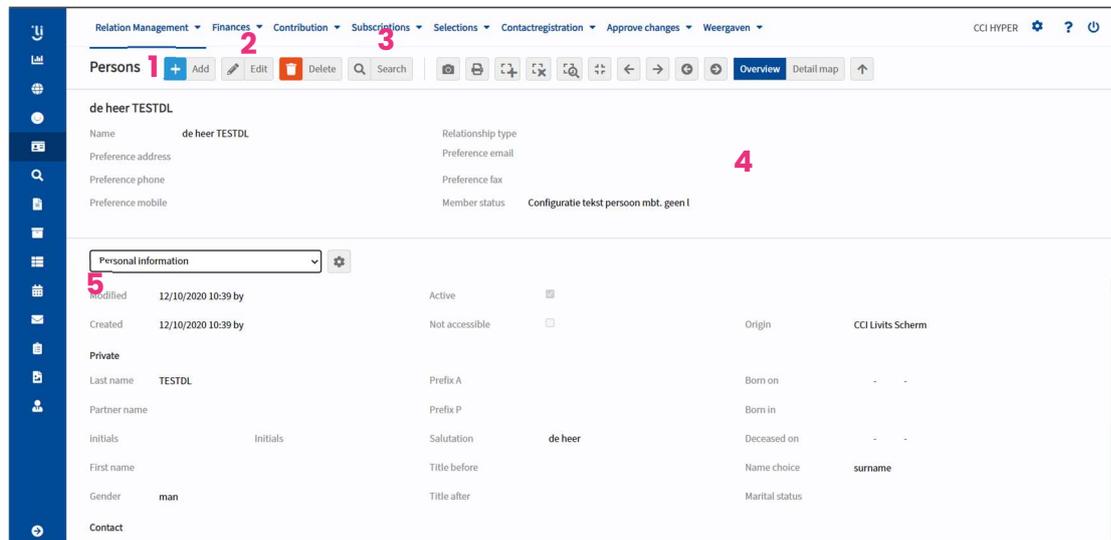
Renewal rules  
 Contact registration  
 Actions  
 Date picker  
 Audittrail  
 Related companies  
 Documents  
 Orders  
 Person payment method  
 Membership  
 Debtors  
 Departments  
 Contactmoments  
 Projects by debtor  
 Additional comments  
 Employees

+ Add Edit Delete

A quick explanation of a few menu options:

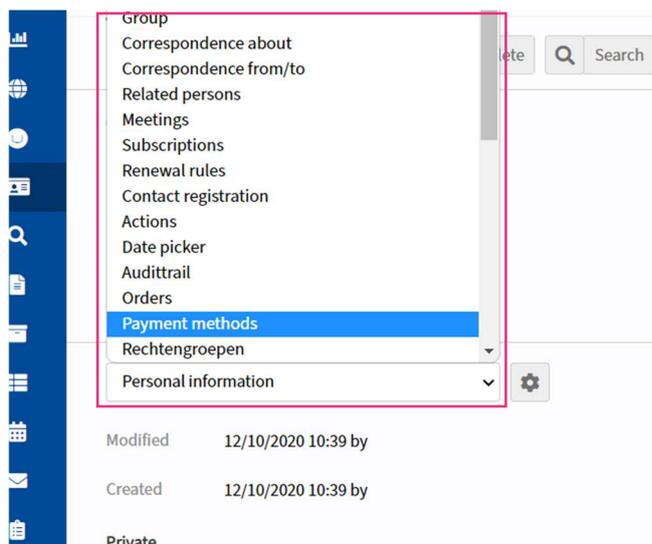
Company information	You can find more information about the chosen company here.
Contracts	You can find linked contracts of the company here.
Staff members	You can find the staff members of the company, inclusive contact information, here.
Attributes	You can find characteristics of the company and make companies recognizable here, to find them later in for example member lists or selections.
Membership	You can find the membership option, contact person, active/inactive and other details of the membership here
Contact registration	You can find contact moments, person and reason here.
Documents	You can find linked documents here.

## 4. CRM – Persons



1. You can add a person here
2. You can edit information of the person (for example the name of the person)
3. The last viewed person will always be shown. With the magnifier you can search for other persons.
4. The preference email address that is been registered in the communication menu will be shown here.

Through the dropdown (5) you can find the menu with other options.



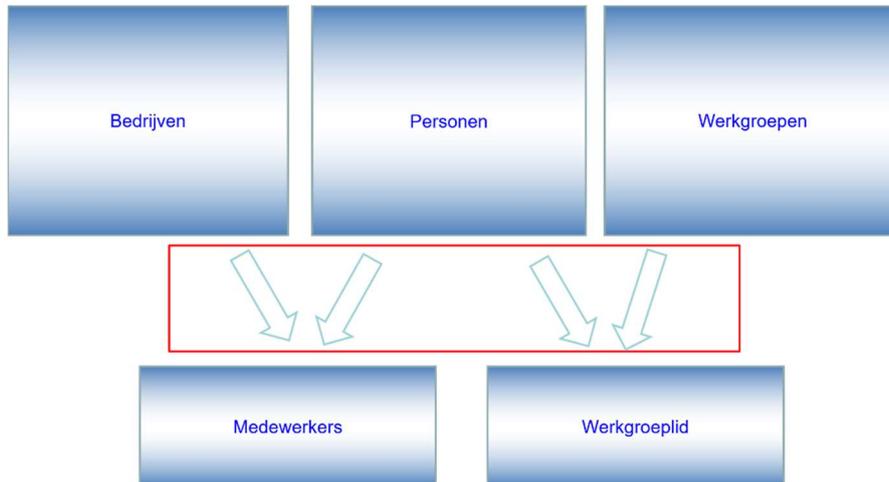
A quick explain of a few menu options:

User data	At user data, you can give a person access to the member network.
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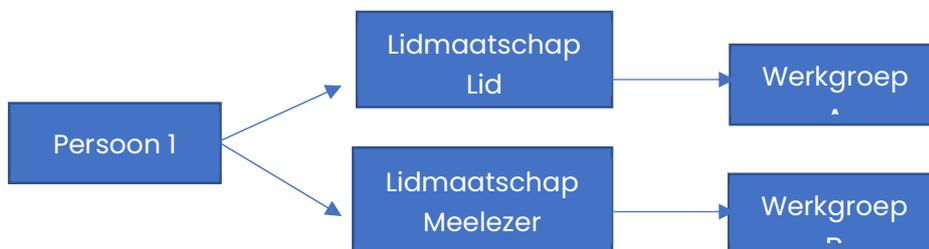
Working at	You can find the linked company(s) of the person here.
Communication preference	You can set the communication preference here. The email address here will be used for sending the link for the member network.
Groups	You can find any workgroup where the person is connected here.
Meetings	Here are the meetings shown where the person is present and the status of this meeting.
Mailing lists	You can find the active mailing lists of the person here. You can also be active of end memberships of the mailing lists here.

## 5. Persons vs. Companies

Individual persons can be linked to multiple companies. This works through Employee ship. At an employee ship you can connect a start- and end date.

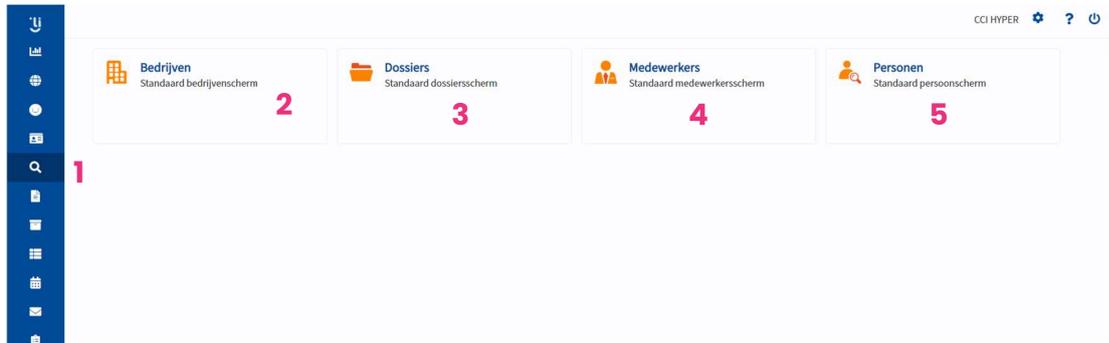


## 6. Persons vs. Workgroups



Individual persons can be linked to multiple workgroups. This connection goes through workgroup relations. To the membership of a workgroup, you can set different rolls.

## 7. Search module/ Flex search

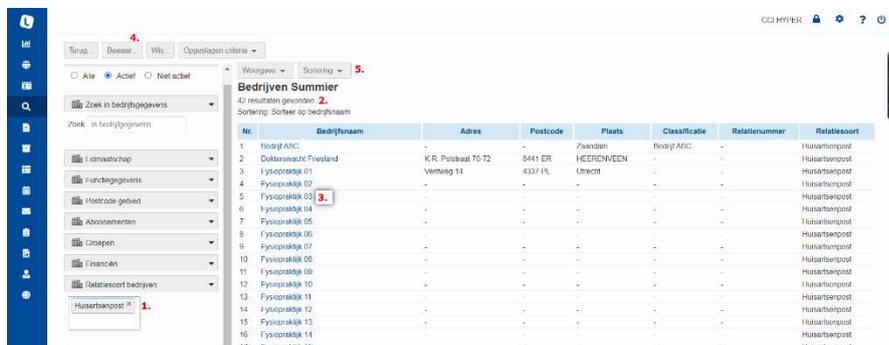


Through the search module in Livits, you can search for information in the CRM. This way of searching is more a filter. First you make the choice in which part of the CRM you want to search and after that you make specifications to narrow down your search.

1. Select 'Search' in the menu at the left side
2. Search information of [companies](#)
3. Search information of dossiers
4. Search information of staff members. The difference with persons is that it's possible to search for example functions and company names where the person works. This information won't be shown on the contact card, but on "Medewerkschap" (the connection between companies and persons)
5. Search for information of persons

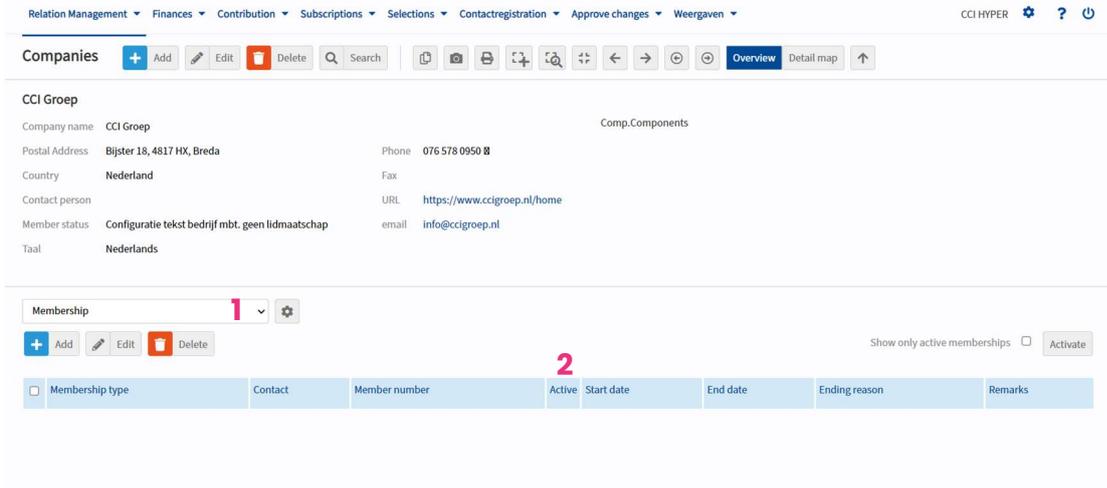
### 7.1. Search example in companies

1. Select the search/filter option on the left side. On the right side, the results will be shown
2. The number of results of your search
3. Click on the name to go to the company card
4. You can save the set filter as a selection here, so you can use the search request more often
5. You can sort the results here



For an more information about the flex search, you can use the documentation 'Flex search'.

## 8. Memberships



Relation Management ▾ Finances ▾ Contribution ▾ Subscriptions ▾ Selections ▾ Contactregistration ▾ Approve changes ▾ Weergaven ▾ CCI HYPER ⚙️ ? 🔌

**Companies** + Add Edit Delete Search [Icons] Overview Detail map ↑

**CCI Groep**

Company name CCI Groep Comp.Components  
 Postal Address Bijster 18, 4817 HX, Breda Phone 076 578 0950 8  
 Country Nederland Fax  
 Contact person URL https://www.ccigroep.nl/home  
 Member status Configuratie tekst bedrijf mbt. geen lidmaatschap email info@ccigroep.nl  
 Taal Nederlands

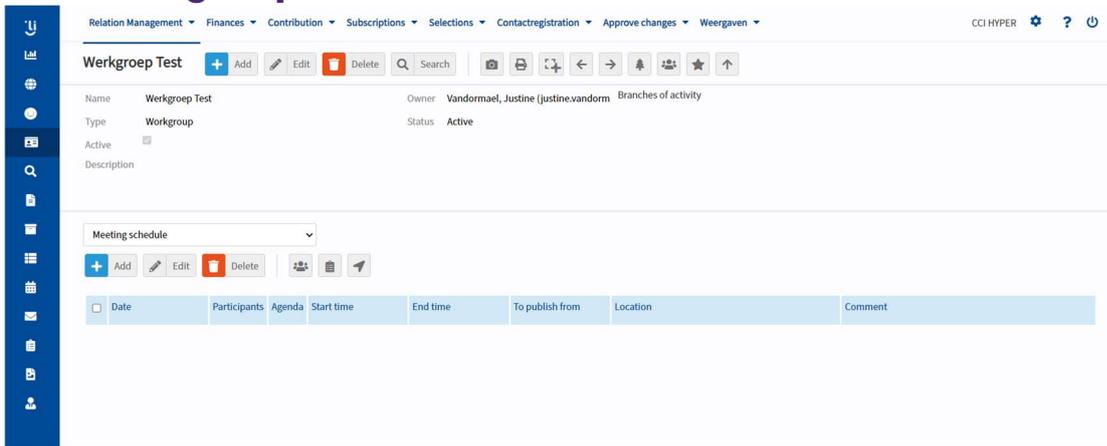
Membership 1 ▾ ⚙️

+ Add Edit Delete Show only active memberships  Activate

<input type="checkbox"/>	Membership type	Contact	Member number	Active	Start date	End date	Ending reason	Remarks
--------------------------	-----------------	---------	---------------	--------	------------	----------	---------------	---------

In Livits we recognize company memberships and memberships on a personal base. You can also see the tab Membership (1) at Companies or Persons. The history of the memberships is saved here as well. At Active (2) you can see a mark when a membership is still active. When the end date of a memberships passes and not extended, the membership will automatically change to inactive (except when there is no end date known).

## 9. Workgroups



Relation Management ▾ Finances ▾ Contribution ▾ Subscriptions ▾ Selections ▾ Contactregistration ▾ Approve changes ▾ Weergaven ▾ CCI HYPER ⚙️ ? 🔌

**Werkgroep Test** + Add Edit Delete Search [Icons]

Name Werkgroep Test Owner Vandormael, Justine (Justine.vandorm) Branches of activity  
 Type Workgroup Status Active  
 Active   
 Description

Meeting schedule ▾

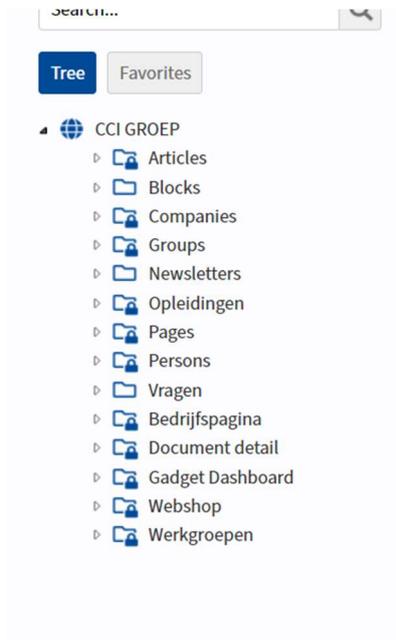
+ Add Edit Delete [Icons]

<input type="checkbox"/>	Date	Participants	Agenda	Start time	End time	To publish from	Location	Comment
--------------------------	------	--------------	--------	------------	----------	-----------------	----------	---------

Persons can be connected to workgroups and use this way of the (private) website (member network) to educate each other and exchange documents, sign up for meetings and see/download meeting documents.

## 10. CMS

You can manage the web pages in the CMS. It is possible to maintain multiple websites via the Livits CMS. The easiest way to view the website is to click on the globe and then right-click on 'View site'.



With the button 'Edit this page' in toolbar (1), you can edit pages directly from the site.



When the blue bar is in the way, you can collapse it with the arrow on the left. The bar will then become a small square in the corner of the screen.

### 10.1. Navigation pages with CMS

Navigations in CMS works 2 ways:

1. Manually clicking through the folders
2. Search for specific pages or content

## Manually clicking through the folders

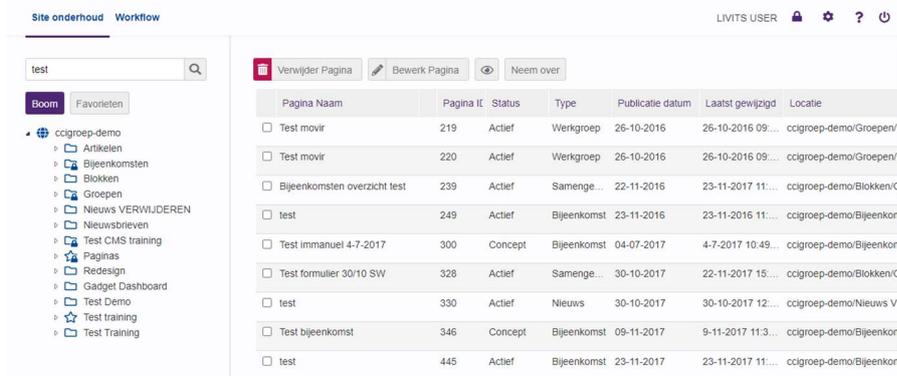
Manually navigate through the folders by opening the individual folders within the CMS. Each website managed within Livits is a separate 'globe' within the CMS.

Below this are the various folders of the CMS in which all pages of the website exist.



## Search for specific pages of content

With the search field you can search for specific page numbers of content in the title of a page. To do this, type the keyword/number in the search field and click on search. The result is shown on the right side of the screen.



## 10.2. Basic folders and folder rights

### Basic folders

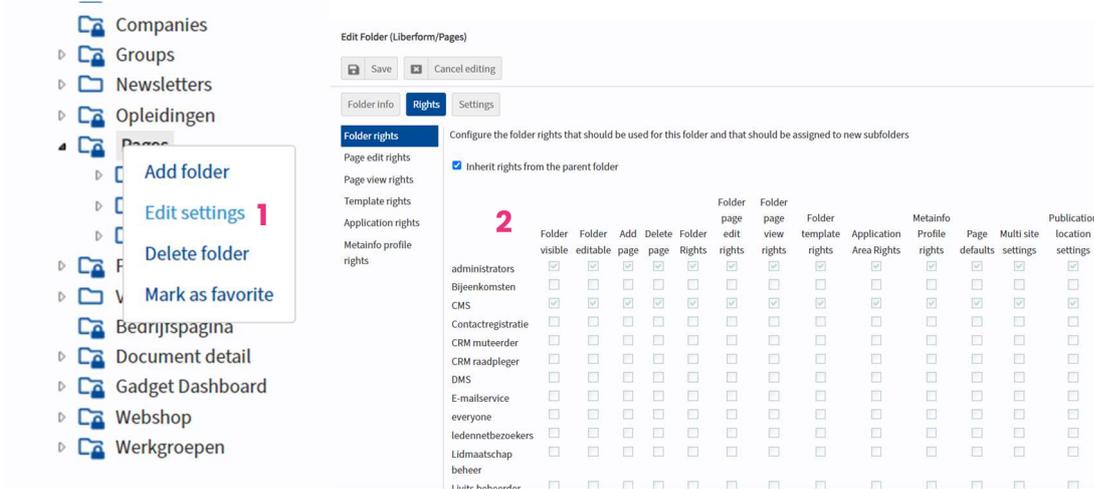
The CMS contains standard folders that cannot be changed. These are system folders with important functionality that can be lost when used incorrectly. These are the following folders:

- Meetings
- Groups
- Newsletters
- Gadget Dashboard

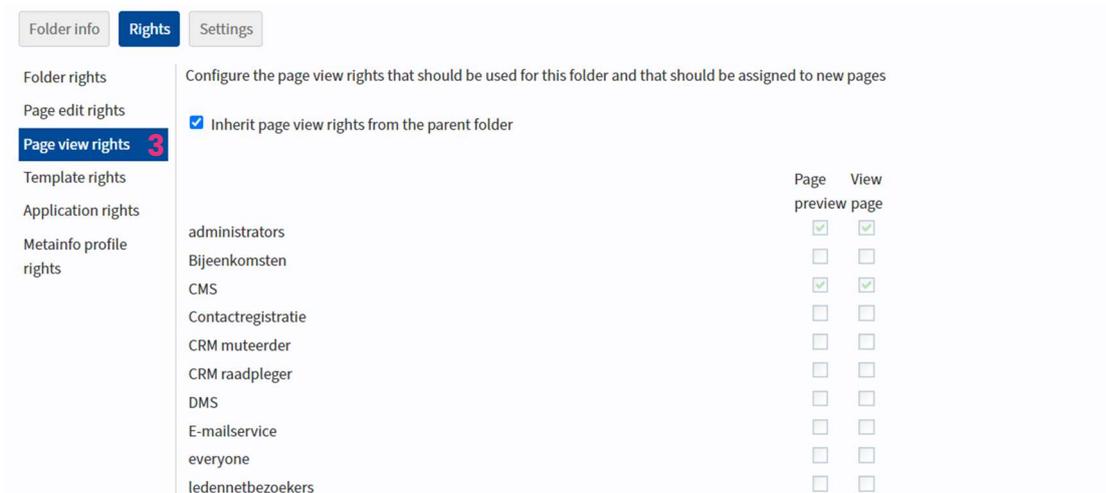
### Folder rights

Outside the default folders you can adjust the permissions of the folders as desired. You do this by going to the relevant folder and right-clicking on it. A dialog will appear in which

you can choose the option 'Edit settings' (1). Here you can edit the rights at the option 'Rights' (2).

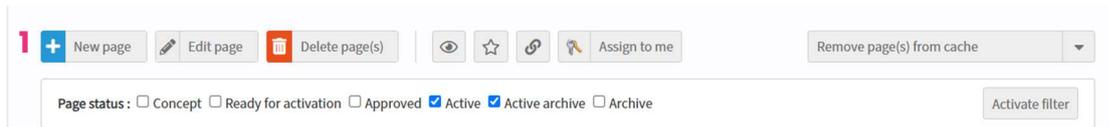


With the tab 'View page rights' (3), you can set up if a folder contains public or private content.

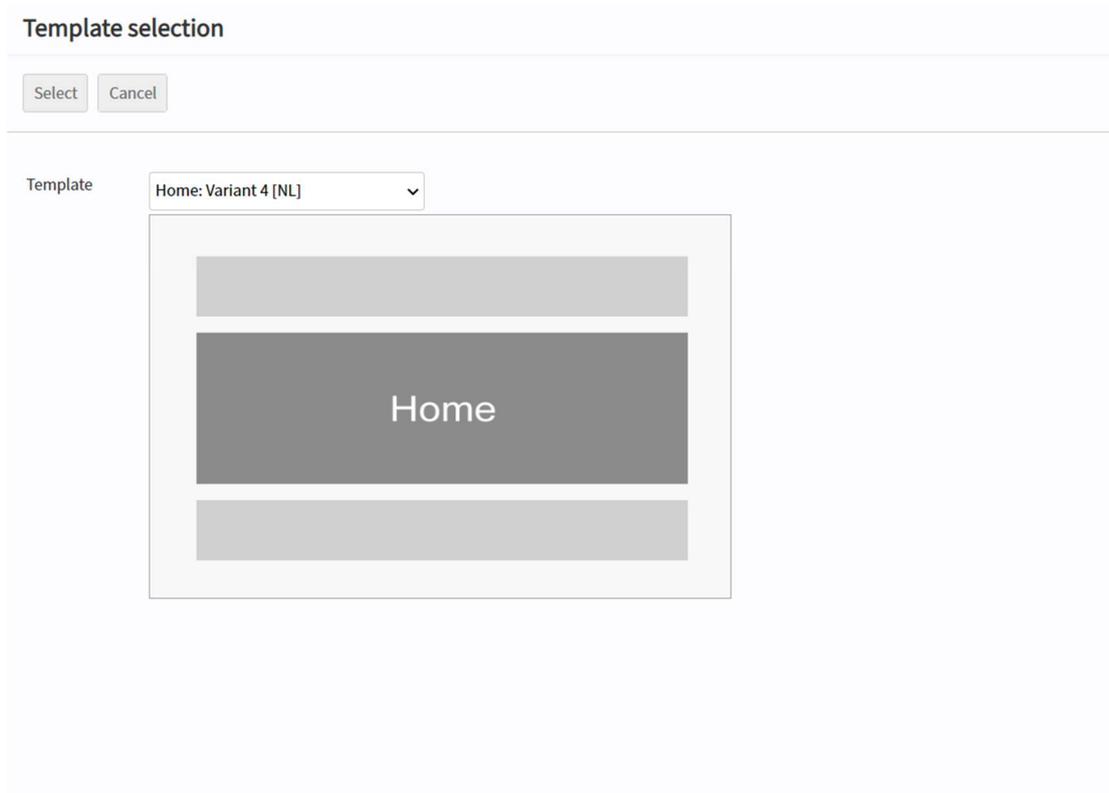


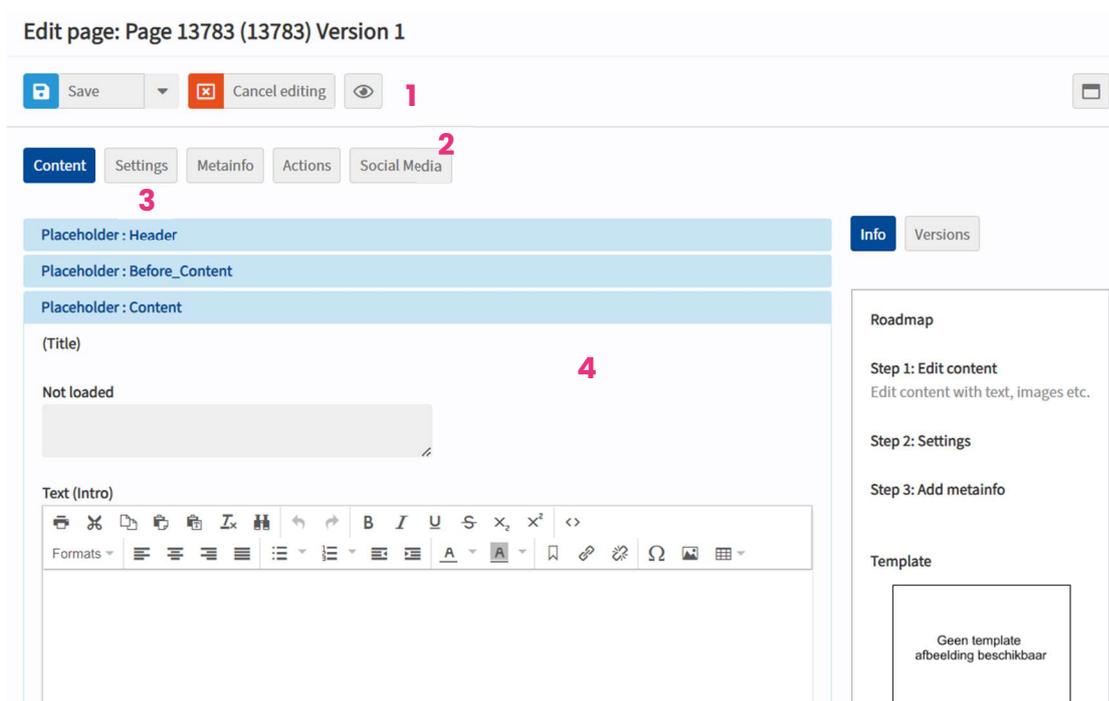
## 11. Page editor

With the button 'New page' (1), you can add a new page to CMS. The filling of this page happens through the page editor that will open in a new pop-up window.



When you press 'New page' there is a possibility to first choose a template. In the dropdown you can choose what the new page will look like, and which basic lay-out is used for this page.





In the page editor you will see the following components:

### 11.1. Action buttons

The most important action buttons show as a bigger button. These are the buttons 'save' and 'cancel edit' to close the editor. Beside these buttons there is an 'eye' icon, which will preview your page.

### 11.2. Components editor

At action buttons you will find the following components of the editor:

- Content      Fill this with the content of the page.
- Settings      Fill the settings of the page here, including page status
- Meta-info      Add an extern page title and meta tags to your page
- Actions      Here you can add an action to this page to follow it from your Livits dashboard.
- Social Media      With the social media tab you can influence the information that you share to social media.

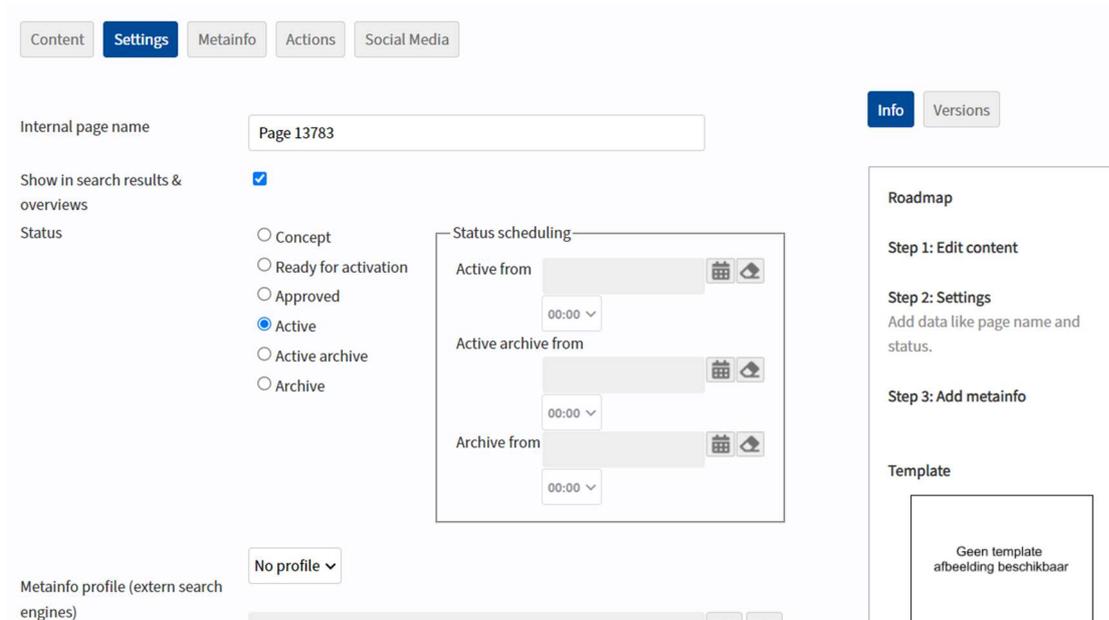
The page editor consists of placeholders that shows a part of your page and its content. In the text editor you can add the content for your page.

### 11.3. Status

With the tab settings you can set the page status. In this it's important to know that only pages with the status Active are visible online.

On the right side you have the possibility to automatically change the page status through the following options:

- From Concept to Active through the field 'Active from'
- From Active to active archive through the field 'Active Archive from'
- From Active to Archive through the 'Archive from' field
- From Active Archive to Archive through the 'Archive from' field



Content **Settings** Metainfo Actions Social Media

Internal page name: Page 13783

Show in search results & overviews:

Status:

- Concept
- Ready for activation
- Approved
- Active
- Active archive
- Archive

Metainfo profile (extern search engines): No profile

Info Versions

Roadmap

Step 1: Edit content

Step 2: Settings  
Add data like page name and status.

Step 3: Add metainfo

Template

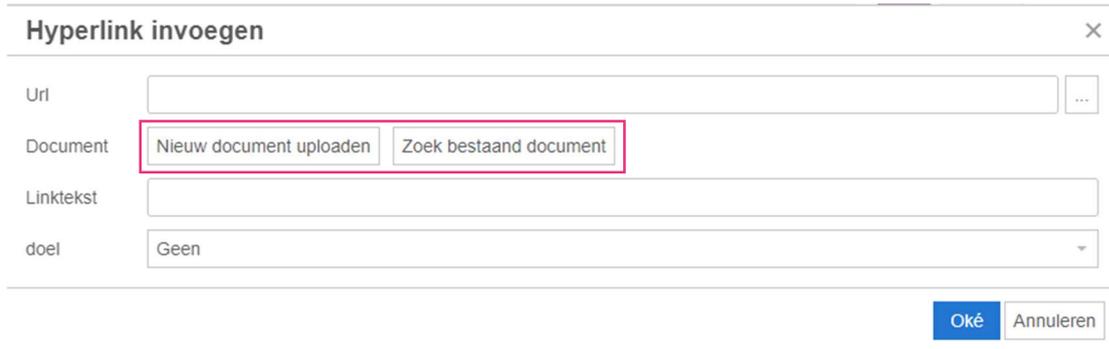
Geen template afbeelding beschikbaar

#### 11.4. Upload of images

The upload of images in CMS is possible at two ways. The first option is through the multimedia module within Livits. You can find this in the Livits menu on the left. The second option is through the page editor through the location 'Add image'.



With the call-to-action buttons, you can add an existing document or upload a new document to connect.



## 12. Tips at the page editors

### 12.1. Formatting (pasting without format)

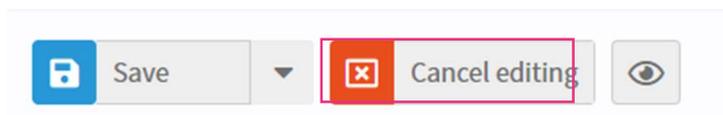
To prevent you from copying formatting from an external document into the CMS, there is the 'paste without formatting' button. When you format a text in Word or another file, formatting is done in that specific program. If you paste this into the CMS, you can disrupt the layout of your page and experience strange appearance of your page.

To prevent this, paste the written text without formatting in Livits and do the formatting from the CMS.



### 12.2. Closing the editor

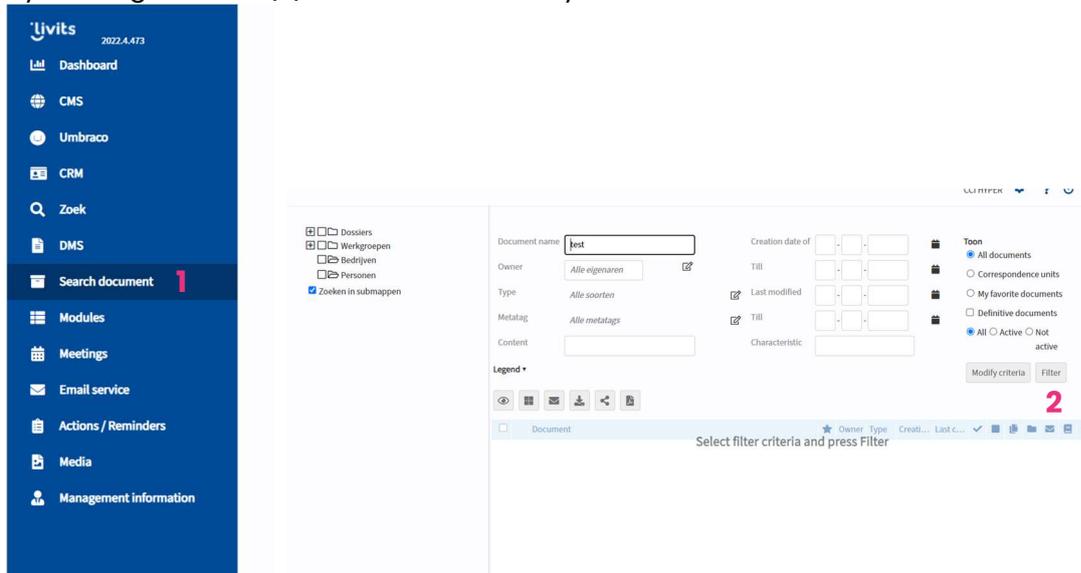
The editor always needs to be closed through the 'cancel editing' button. When the cross is used to close, the page remains in process in the background and another person can no longer edit this page.



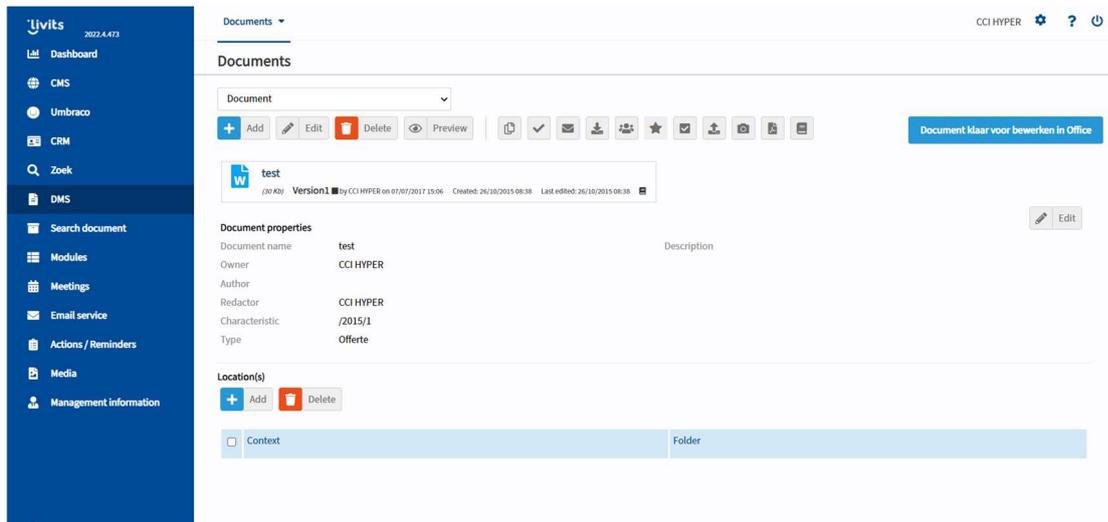
## 13. DMS

### 13.1. Search document

With the module search document (1) you can enter a search text (+ other filter options). By clicking on Filter (2), the documents of your search result are shown.

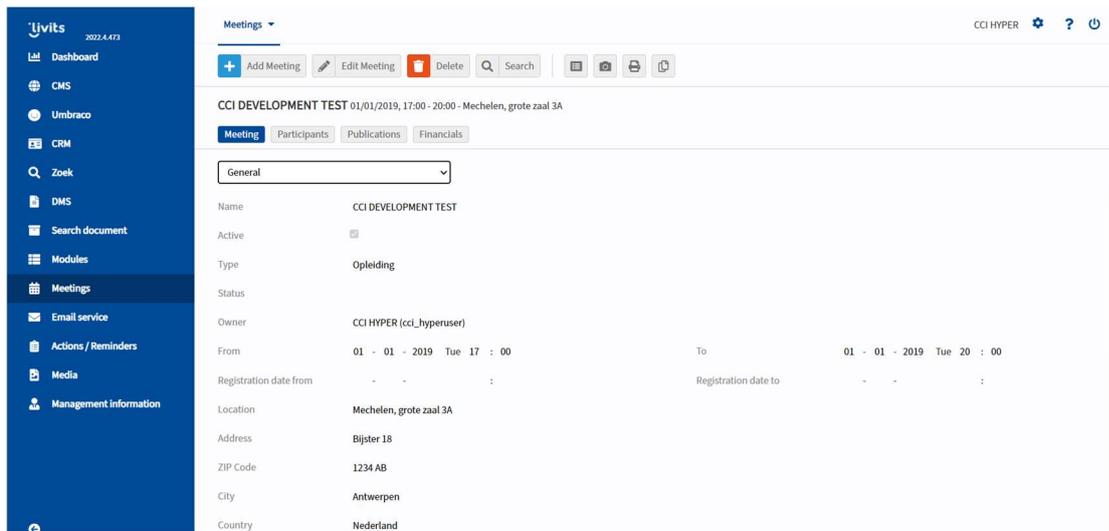


Click on the document you want to view. Now you will automatically jump to the DMS module. The options of the document tab allow you to view, edit, share, generate PDF and download the document.



## 14. Meetings

You can add new meetings and edit existing meetings via the Meetings module. Publishing meetings makes them appear on your webpage. You can choose per meeting on which page or pages (public and/or private) you will publish the meeting. You can edit the meeting registration form via the “Edit form” functionality. This works via drag & drop functionality.



Invitees are selected from the CRM (for example by means of a selection) and they can receive an email with a link to the registration form. When invitees have registered, they automatically move to the registrations tab. This separation makes it easier, for example, to send a reminder email at once go to invitees who have not yet registered.

It is also possible to have participants register for program components and to make choices about facilities.

For a more detailed explanation of the meeting module, a manual for the meeting module is available as separate documentation.

## 15. Email service

Through the email service you can generate digital newsletters and send them to your members. This module will give you the opportunity to send the newsletters to your members through selections (dynamic or static).

### 15.1. Different kinds of newsletters

We have two types of newsletters within Livits: manual and personalized.

With the manual newsletter, the content is sent and displayed to all recipients. No distinction is made here in the areas of interest of the recipients.

With personalized newsletters, the recipient only sees the messages and content to which they have subscribed. Areas of interest can be defined in the profile of the member network.

### 15.2. Fill a newsletter

Filling the newsletter is equivalent to filling a page in the CMS. The same page editor is used for this, making it easy to create your newsletter. In addition, it is possible to automatically fill the newsletters by selecting messages from the CMS.

### 15.3. Send a newsletter

You can send the newsletter via the envelope. You can choose from various options for sending the newsletter. This can be done via a mailing list (based on a workgroup or selection) or on the basis of a CSV file that you read into the module.

### 15.4. Statistics

You can view the statistics of your email sending via the statistics button. Think of statistics such as recipients, sending time, number of e-mails opened and number of clicked hyperlinks in your newsletter.

For a more detailed explanation of the email service, a manual email service is available.