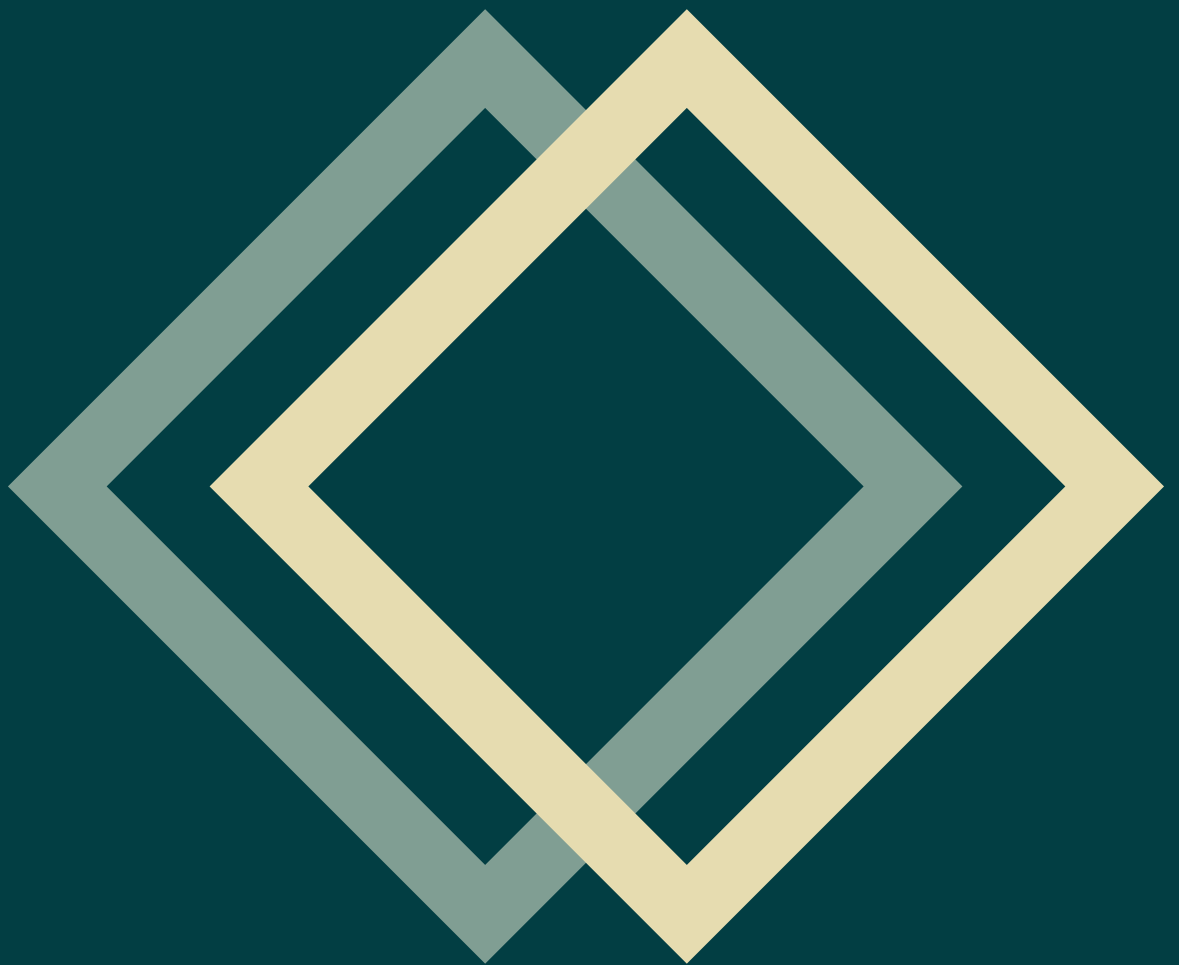


Agilebase

How it works

**Frequently asked questions.
Detailed answers**



Agilebase

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How can I create my own CRM system on Agilebase?

Agilebase is a leading no code CRM system.

Citizen developers like you have the power to create a CRM system designed to perfectly suit your business. And you can do it without knowing any code.

Agilebase has a series of generic capabilities ready to go, such as creating a table or report, or managing contacts, invoices or stock movements for example. Agilebase has been around for 14 years, so the number of these capabilities is high. Unlike other software systems, there is no limit to what you can do with Agilebase.

If you want to create a table or add a field to the table, Agilebase will develop and build the database structure for you. At the same time, it will supply the user interface that makes your table accessible.

Agilebase will run automated workflows to create files, send messages, and send emails. All the things you need to do with the data once you have it.

We have designed Agilebase to ensure lower-level citizen developers cannot cause any harm while using the system. As you increase in experience and skill level, more actions are available to you. As an expert user, a software architect, you can access everything.

Can I connect Agilebase to other software?

You don't need to be a programmer to build your software in Agilebase. Nor do you need to be a programmer to integrate with third-party systems.

An Application Programming Interface, or API, is available for each table or view you build. And you can turn those on by clicking the tick box.

For example, imagine you create a view of invoices, and you want to send that data to an accounting package such as Sage or Xero. When you go to your view of invoices, you tick the option that says make this data available to third-party systems. It automatically creates an API for that view in a standard compliant format, using technologies such as JSON for data transfer or REST API. These are common ways of integrating with third-party software.

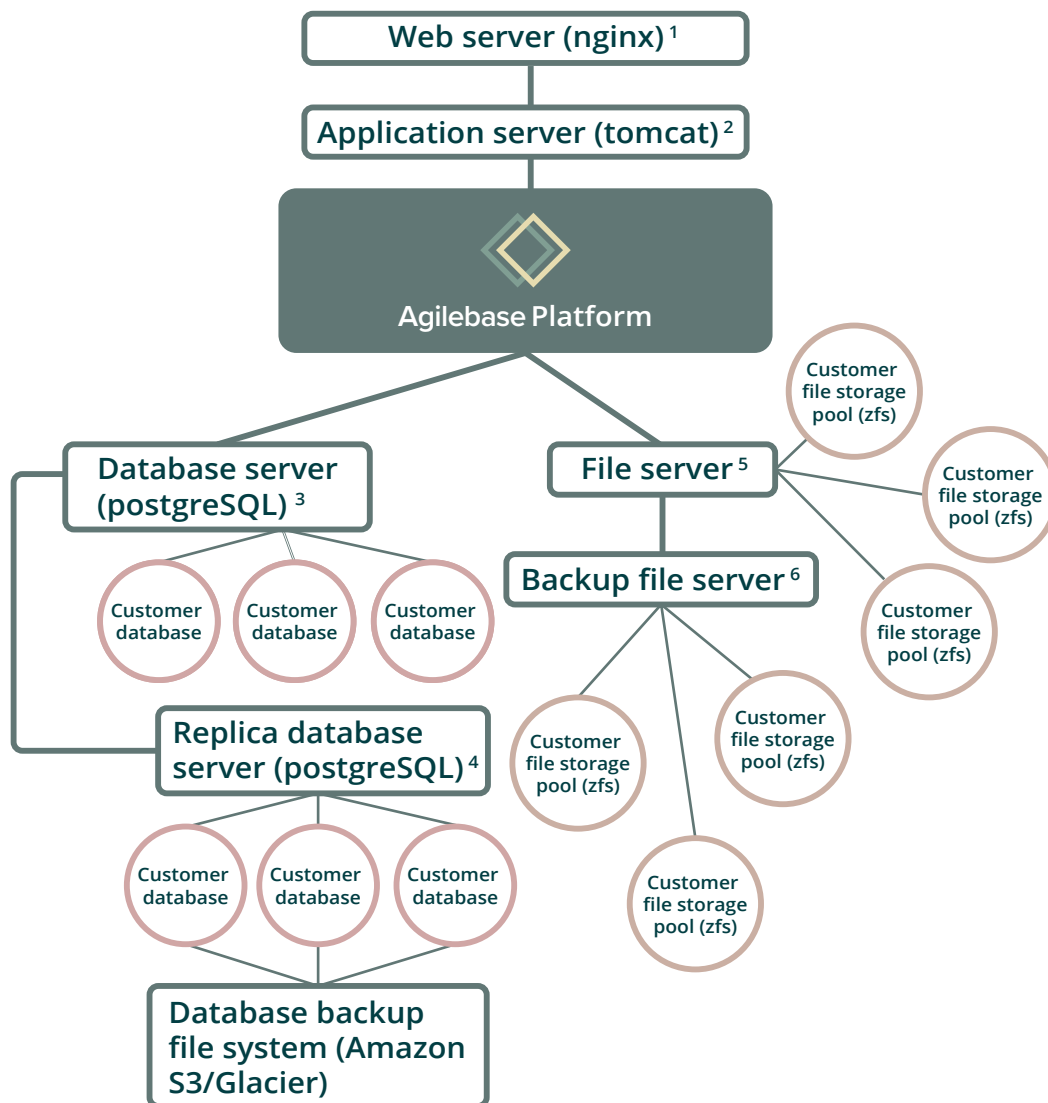
Another developer will be able to use that API. Agilebase will ensure it is well-documented, they will get the URLs and parameters they need to query and work with it, and they will be able to use that to send the data elsewhere.

Third-party tools such as Microsoft Power Automate s or Zapier and Make.com are no code systems for using APIs. It's easy to use them.

How does Agilebase work?

Agilebase's tech stack is a series of connected servers.

- Namely:**
- Database
 - Database replica
 - Application server
 - Web server
 - File storage
 - File storage backup
 - Monitoring
 - Reporting



¹ The web server sits in front of the Agilebase platform and interacts with a user via the browser.

What you see on screen and what happens in the background is an orchestration of all Agilebase services working together.

For example, logging in involves the web server displaying the login form. The application server checks the entered password against an

encrypted version stored in the database, plus optionally a two factor authentication code. The Agilebase platform then generates a screen of tiles. You can access the contents of various tiles such as recent comments by more queries to the database.

² The application server runs Apache Tomcat, a Java-based application that manages the login, and the user sessions and communicates with all the other parts of the stack.

³The database server is the largest in the Agilebase stack regarding memory and processing. It stores and processes all the data in Agilebase. When you view a list of customers or stock, that data comes from the database. And the database is Postgres, an open-source database well known to be one of the most robust and reliable platforms with a large community of users.

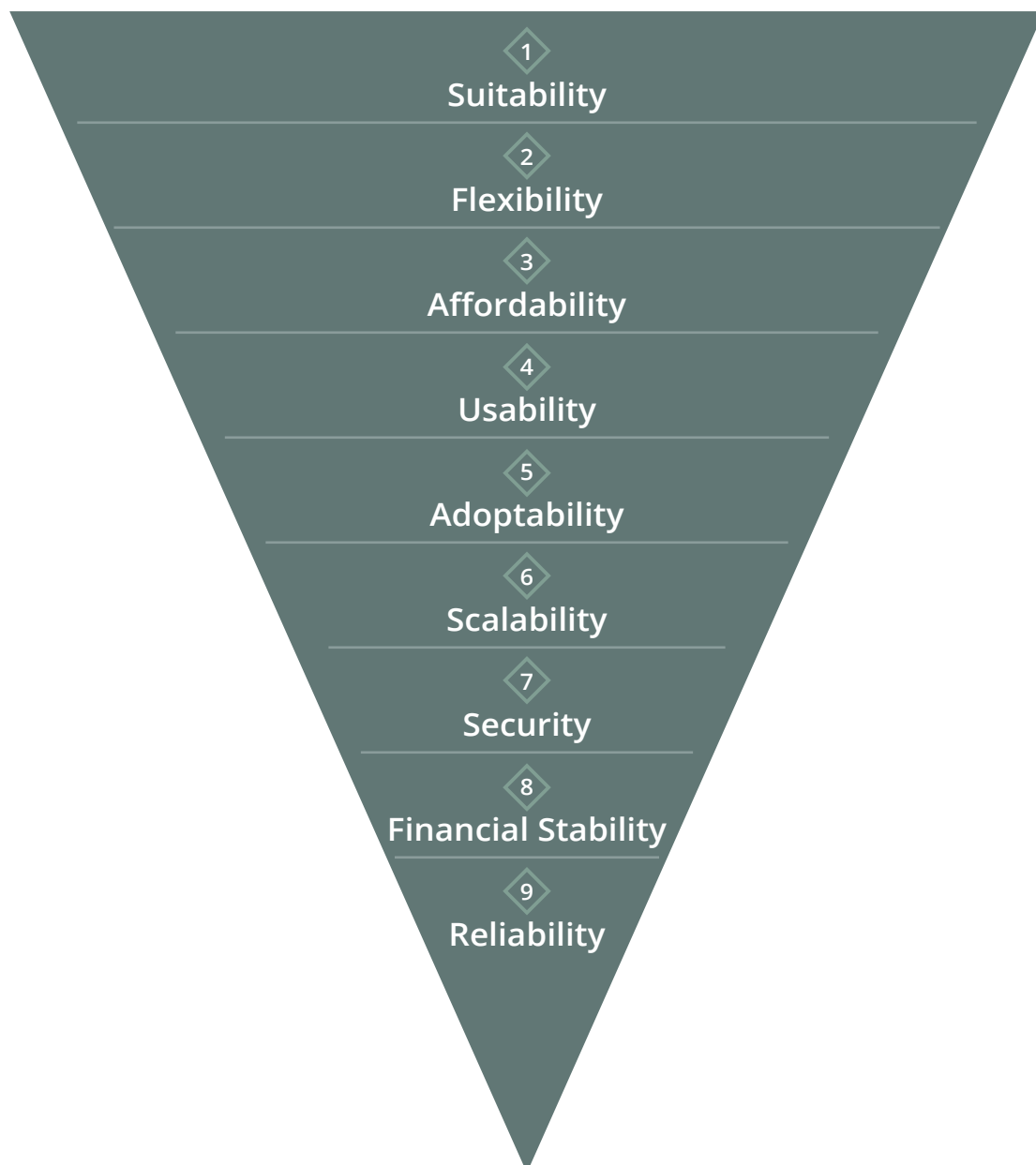
⁴The database replica server is an exact copy of the central database. Every time data changes on the primary database, it's synced to the replica as a backup.

⁵The storage server stores files. The data on the file server is for documents such as PDFs, Word documents, and images. The storage server has two components - a server and a separate, cloud-based file system.

⁶Every time you generate a document using Agilebase (such as an invoice), or you upload one, there will be a record in the database, and there will be a file, a PDF, which the system can email to customers. A copy will be stored on the file server and back-up server.

⁷When you become an Agilebase customer, your firm can get its own database and file storage system should it be required.

Why Agilebase is the perfect choice for ambitious SMEs looking for a CRM platform



Frequently asked questions

1 Suitability

Agilebase is the right software for your organisation.

Agilebase runs a free, half-day discovery workshop where we rapidly prototype your solution to showcase the power and affordability of our No Code approach. If you wish to book a workshop, please see the details at the end of this document.

1. Do you provide a demo?

We provide free demos at a time that suits you and your team.

2. Can I get a free trial?

We do not provide free trials unless you, or a partner you are working with, have prior experience using the software.

3. Do you visit prospects?

We can organise a site visit to your workplace so you can see the software in a real-life situation.

4. Can I see a list of your previous clients?

We can provide a list of clients that use the software and are similar to you in sector and size.

5. Will you undertake a requirements definition process?

We can perform a formal requirements definition if your organisation needs a documented specification. It is a chargeable exercise. Should you adopt this approach, we will document it in your proposal.

6. Is there an offline/mobile version?

As a web-based platform, Agilebase can be used on tablets and phones. For an optimally efficient process, developers typically create mobile software for specific tasks, such as booking goods into a factory. So if a mobile app is required, we work with partners to develop simple-to-use mobile or tablet apps that access the full power of Agilebase by communicating with APIs.

We are happy to put customers in touch with our mobile systems partners or reference customers who've implemented these systems.

2 Flexibility

Agilebase can adapt to whatever tomorrow brings.

Few organisations can specify all their needs when they begin purchasing software. And it is hard to know how well software will map to these as yet unknown requirements.

We make sure Agilebase software fits after implementation and, over the longer term, is adaptable enough to evolve as the organisation rises to meet each new and unforeseen challenge.

1. How easy is it to build new functionality? Can I create a custom user interface?

We can make changes much faster than traditional software as a No-Code system. But to be secure, we must build within the Agilebase platform's controls and set flexibility limits.

For example, we built Agilebase's UI to a set of rules and configuration settings. We cannot alter these rules within the platform. But it is possible to use the platform's in-built API to interact with your custom-built application. We have customers who have built dedicated mobile apps with a specific UI and user experience tailored to specific jobs while interacting live with their core Agilebase system, e.g., a Stock Control Mobile App with bar code scanning.

2. How easy is it to build new functionality?

It is easy and fast.

3. Can I add amendments and new information locally?

We can make changes much faster than traditional software as a No Code system.

No new software system precisely matches a buyer's needs. Minor changes smooth your company's adoption of any new software.

As part of your subscription, you will always use the latest software version. We listen to our users and make software enhancements based on that



feedback. Please speak to us about any new features you think may help. We offer custom development work.

3 Adoptability

All the support you will ever need

Every company's goals are different. Therefore, your on-boarding needs will be unique. We work with you to create a tailored "proposal" that will indicate how much support with data population or staff training we believe is appropriate for your company's project.

1. How do I get my old data into your system?

One of the critical factors determining the successful adoption of any software is the quality of the data population strategy.

The Agilebase platform has an easy-to-use CSV import facility. Due to its power, we have restricted the CSV importer to those users with appropriate access permissions.

2. What method do you use to upload the data?

We provide tools such as a library of data population spreadsheets, excel or sheets compatible, and a dedicated on-boarding team to help and support you throughout the process.

We work with you to create a comprehensive plan covering data cleansing, transformation, import, and validation.

3. What training will I get?

We have made every effort to make the software intuitive.

If required an Agilebase partner can train a citizen developer during the course of a project implementation. You can decide how much training is appropriate for your company during the initial costing exercise.

In addition, we provide training material, FAQ, and help videos, and the guided learner progression system connected to permission levels built within the software system.

If you become stuck and need advice, there is a community of developers you can access to help you out. You can purchase additional platform training if you need a more intensive face-to-face approach.

4 Usability

You will love using Agilebase.

All interfaces and navigation mechanisms follow a standard pattern. Once you know how to use one system area, the rest will feel familiar.

1. Is it easy to use? Is it easy to learn?

Agilebase's user interface, built with standard web technologies, is clear, concise, consistent, attractive, effective, and efficient.

5 Affordability

Fair and transparent pricing.

We aim to be transparent in our pricing. We make our entire range of services and products, plus their associated costs, available to you in your Initial Costing document.

Our monthly fees cover the subscription to the software service, technical support, and product upgrades.

We have annual price reviews. The terms of our contract with you limit the extent of any rises.

1 What does a User Licence mean? Am I restricted to a specific machine?

A user licence grants a unique user identification and password to access the software. We restrict the user licence to one concurrent connection. However, as the service is web-based, there is no restriction on the number and location of machines the user can use.

For example, you could have a generic user such as "accounts payable" used by all the staff in the accounts team to explore client queries. Alternatively, you may want to enforce full traceability and lock down "accounts payable" to a single person.

There is an exception. Software architect licences can have multiple concurrent connections.

2. What does my monthly fee cover?

The monthly subscription is for software service, technical support, and product upgrades. It does not include "project" costs such as data migration or training.

3. What happens when I exceed my usage limits?

The following month your invoice will increase. We provide you with a pricing tool (a spreadsheet) where you can play with the parameters to see any effects of exceeding your expected usage.

4. Are there any hidden costs?

We aim to be transparent in our pricing. With this in mind, we make our entire range of services and products, plus their associated costs, available to you via the Initial Costing tool.

6 Scalability

Agilebase loves complexity and easily connects with other systems.

1 Will it slow down over time?

We put effort into ensuring the system remains high performance for most usage.

If the volume of users or records increases radically, we will provide dedicated database hosting.

In big data enterprise environments we can work with you to provide custom hosting options which comply with your requirements and SLAs.

The platform supports segmenting data via role-based multi-tenancy for larger companies that may need to hide data vertically from divisions within their own company.

We continuously monitor the performance of the service. We deal with any issues that arise as our number one priority.

2 Will it be able to link to other systems?

For those worried about the system becoming an island, an in-built dynamically generated API allows you to connect with external systems. The API supports both PUSH and PULL querying.

For each view and table you create in Agilebase, the system auto-generates an API. This API can be enabled or disabled with a single click. It provides a documented way of sending and receiving data from third-party systems using standard technologies. (It's a standards-compliant REST API with JSON data transfer.) The use of API Authorization keys ensures security.

3. Will it be able to expand along with my future growth plans?

We built Agilebase on the PostgreSQL database. It is a powerful, open-source object-relational database system with over 30 years of active development that has earned it a strong reputation for reliability, feature robustness, and performance.

As your company gets larger and more complex, so does Agilebase. It has a powerful workflow engine that can edit data and create new records. It can generate documents from templates, send emails and chase people (inside or outside the company) for responses when necessary.

Scalability comes with increased compliance responsibilities such as GDPR. Agilebase has built-in tools to help maintain compliance as user numbers and system size grows.

4. How do I test developments before making them live?

When you start integrating with apps representing other parts of the business, testing new developments and changes can be beneficial before putting them live.

Examples include when you accept orders via an e-commerce website, send invoices to an accounting package, or accept incoming stock change records from Goods In staff using a barcode-scanning application.

In these cases, you don't want large quantities of test data polluting your live system. And you don't want a change to cause online orders to be missed or incorrect invoices to transfer to accounts.

As Agilebase is a no-code platform, there are no 'code' changes to deploy. But you may wish to commission a test server setup.

The test server will be an exact copy of your live system. The application structure (table, views, etc.) will be the same as the data in the database. All users and roles will be the same. People can log in using their existing usernames and passwords to test changes.

In addition to testing your changes, the test server comes with the added benefit that you can access pre-release versions of new versions of the Agilebase platform itself.

That means you can test out new features before they're released and run your API tests against them if you like.

For more details see:

<https://docs.agilebase.co.uk/docs/integrations/test-server/>

Security

Agilebase has built security into every part of the system.

Agilebase has many security features, from the roles and privileges system to Two Factor Authentication and password hashing.

Our systems have been penetration-tested by customers. And we're happy to let any customer organise a penetration test from any reputable security organisation.

Expert consultants helped design the infrastructure. ISO accredited data centres in the UK host the data (with backups hosted by similarly accredited companies in the EU).

Our Learner Progression system ensures you can securely delegate system development while an administrator retains control of what each person can do.

Each customer has a database, separated from others, with a different username and password.

Agilebase is serious about security. From software development to logins, it is central to everything we do.

Software Development

We use industry-standard tools such as Spotbugs and SonarLint to maintain best practices.

We include precautionary checks against SQL

injection, XSS vulnerabilities, and emerging types of threats in our development processes.

When we identify a security issue or potential improvement, we log it in the development list with a 'security' tag.

Software Stack

We built our software stack with industry-standard software components, each containing data security mechanisms.

Operating System

We automatically patch the Linux operating system daily to ensure published vulnerabilities are addressed without delay, avoiding attack surfaces like many in the news. We follow best practices, including disallowing password authentication for logging on (certificate authentication is supported) and running firewalls and intrusion detection systems.

Postgres database

The Postgres database has a high reputation for robustness and security. It's configured to use its in-built protections, e.g., encrypted passwords and disallowing any remote access except for specific safe listed IP addresses.

Apache Tomcat servlet container

This stack level manages logins: we don't write our password-checking logic. We use their security filters to ensure we follow modern best practices.

Hosting and infrastructure

The hosting company Linode runs data centres worldwide in London, Europe, America, and Asia. It enjoys a high degree of physical security. We store all Agilebase data in their UK data centre, Telecity Group's state-of-the-art Powergate facility.

Linode enforces strict filtering rules to ensure that Virtual Private Servers (VPSs) can communicate using their allowed IP addresses to prevent VPSs from spoofing others' IPs or performing man-in-the-middle attacks on our private network.

VPSs operate within KVM or Xen virtualization, which ensures that each VPS has its kernel and

userspace, which are separate from other VPS and ensure that a malicious VPS cannot access the host itself or other VPS's resources.

Each component of the Agilebase stack detailed in section A are separate, single-purpose servers or services with appropriate monitoring, firewall rules, and mandatory access control (MAC) rules. This separation of concerns ensures security is easier to maintain.

Backups

The backup policy includes different types of backup (all automated) and is tested for data retrieval in the event of a disaster.

VPS takes snapshots of the entire server daily and weekly, and we keep the most recent version.

Database and Agilebase content (uploaded files, custom templates) backups are taken daily and transferred to Amazon's S3 storage, hosted in the UK. Older backups transition to Amazon Glacier, who keep them for 200 days. This period allows a balance between the practical necessity of allowing rollbacks to a certain point in time while not storing data for an unnecessarily long period to comply with GDPR.

The S3 backups are encrypted so that Amazon cannot access the data within them.

We apply Vault Lock with a policy of 100 days to guarantee that no files can be deleted or overwritten backed up within that time to protect against threats such as ransomware.

We test the backup and recovery process regularly. Sometimes recovery is tested if a customer wishes to look at a data snapshot from an earlier time, which can happen occasionally.

Application Level

Pre-use: logging in

An industry-standard SSL certificate protects all logins. The number of failed login attempts allowed per username is limited, after which we lock users out for a period.

We encrypt passwords in the database. We enforce rules on password complexity and length.

Agilebase supports two-factor authentication. If a user logs in from a location or device not seen recently, the system prompts them to enter an additional code from an Authenticator app.

Two-factor authentication is mandatory for system administration and other functions (e.g., exporting or bulk editing). It can additionally be made compulsory for all users in an organization.

Use: facilities once logged in

We attach granular privileges to users and roles within Agilebase to specify the access allowed to each user.

We allow read-only, edit, or management facilities per dataset.

We can apply specific privileges to access a subset of data (e.g., a member will see their private info); to a certain functionality, such as the ability to export or the selection of fields and views available, which business rules can control.

Post-use: reviewing past actions

An audit trail of all user and administrator actions, including logins, data searches, edits, and password/privilege changes, is available for administrators to view in the system or download anytime.

We store by default logs for one year, but we can extend this on request.

More information is available here:

[Agilebase data security - policies and procedures](#)

Our GDPR process overview is:

[Agilebase GDPR - policies and procedures](#)

Our privacy policy is: [Agilebase privacy policy](#)

8 Vendor viability

We are a long-lived company with sound finances.

What happens to our data if you disappear?

Customers can export all data to spreadsheets at any point. There are options for letting customers continue to pay for hosting if we, as a company, stop trading to allow time for migration. Our partners, who are familiar with Agilebase development, can help support customers.

9 Reliability

We will support your staff.

1. How supportive is the company?

Our platform customers build bespoke systems that encapsulate their business logic. At least one designated individual, the "domain" expert, is qualified or trained to respond to low-level user requests.

If their request is a technical issue with the platform (or the user has identified it), then we have a helpline. It is available from 9 am to 5 pm on weekdays, with the out-of-office support service available for critical issues such as the service being unavailable.

When your company's in-house expert needs support extending the system, you can access training material, FAQs, help videos, etc. In addition, we built the platform with a guided progression system connected to permission levels that ensure that any "citizen developers" within your company can build appropriate functionality to their knowledge and skill level. If you become stuck and need advice, a community of developers is happy to help you.

2. How robust is the software?

We built the service for robustness and resilience. There are "failover" servers to ensure continuity of service and daily backups stored for 200 days.

3. Can I call 24/7, 365 days a week?

Our daily lines are open for general technical support from 9 am to 5 pm. Call 0117 321 0104 or email: support@agilebase.co.uk Out of hours, limited support is available for critical issues. Critical issues are those which affect the availability of the service. They will affect multiple users. Users report them as a total or partial system outage. We endeavour to fix these as soon as possible. Sometimes a local internet connectivity issue can hit a customer at an inopportune moment. Remember that you can access the service using your mobile phone's internet connection. You can access the service on any web browser in the world.

On rare occasions, the service may be unavailable for technical reasons. If you think the service may be down, please call 01173210104 or email: support@agilebase.co.uk

Next step: book a workshop

We can run a free half day discovery workshop where we rapidly prototype your solution as a way of supporting our claims about both the power and affordability of our No Code approach.

Get in touch

