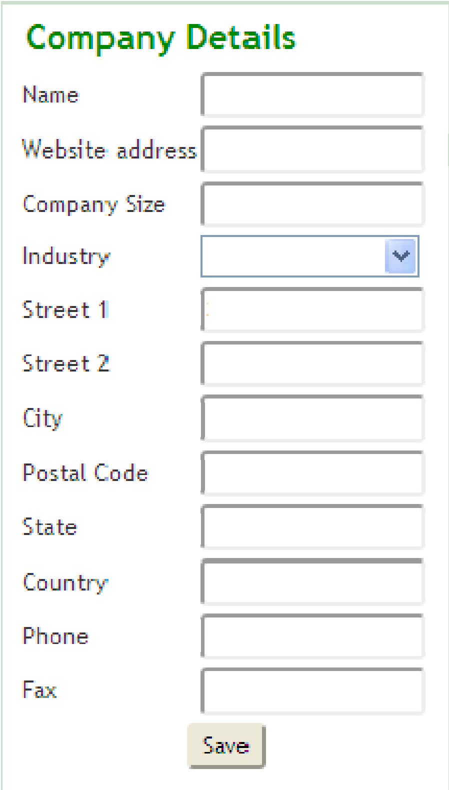
Customize CRM on your own

Setup Company Details

You can personalize the application by uploading your Company logo and details to your **CRM** service; as a result, company logo appears on your home page. Also, your company logo and address can be used in email templates and *Inventory* tools such as *Quotes* and *Invoice*, when exported to PDF files.

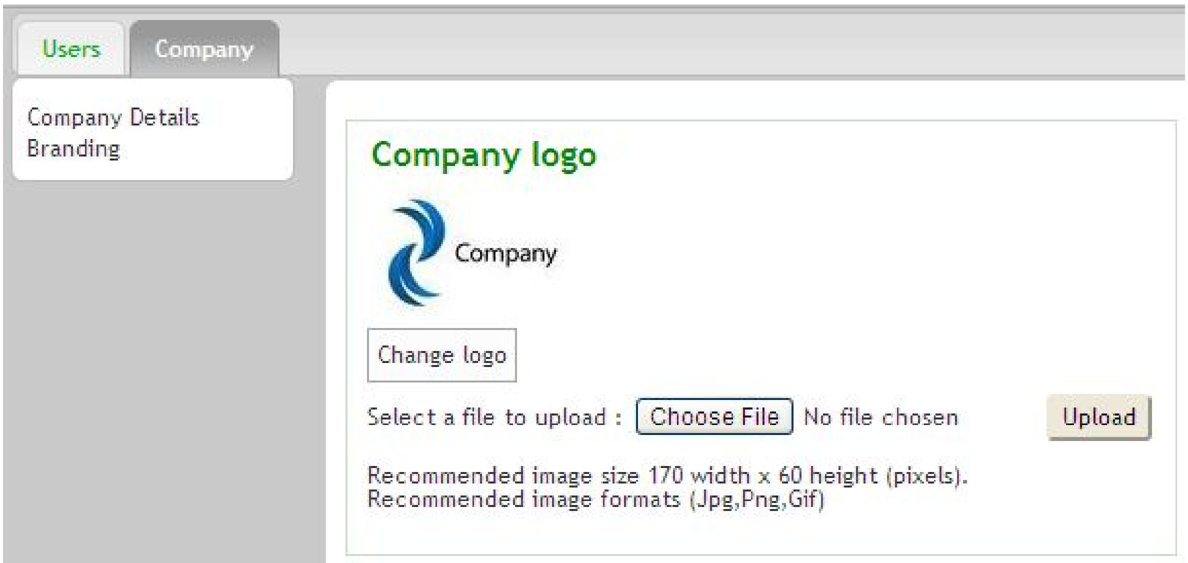
Steps to update your Company details in **CRM**:

Go to ***CRM Settings Icon*** > ***On-Demand Admin*** > ***Company***. Fill up the fields in *Company Details* block and click ***Save***.



Steps to upload your company logo in **CRM** service:

Go to ***Branding*** > ***Change logo***, click ***Choose File*** to browse for your company logo and click ***Upload*** to save changes.

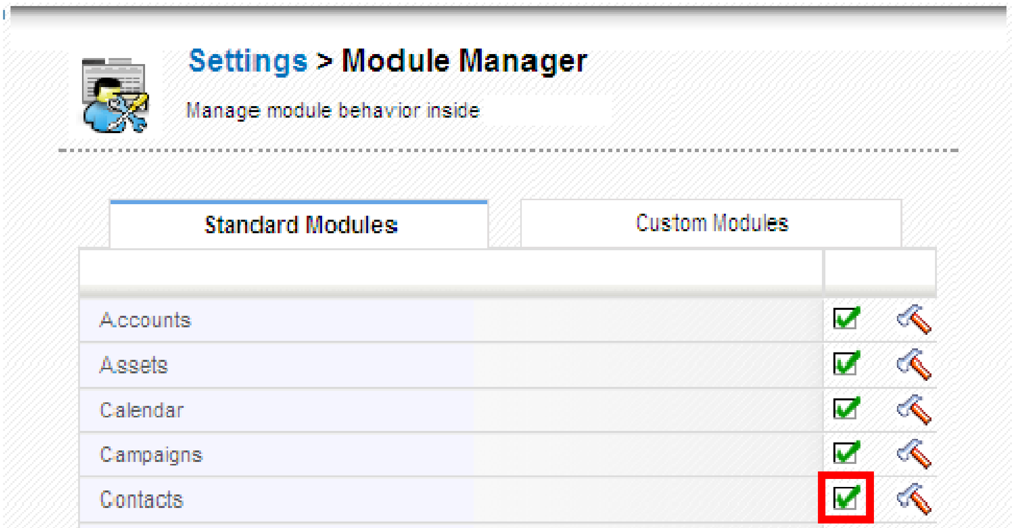


To enter your company data in **CRM open source**, go to ***Settings*** > ***Company Details*** (This can be found under ***Communication Templates*** block). Fill up the fields in *Company Details* block, browse for your company logo and click ***Save*** to save your details. Make sure that you upload .jpg or .JPEG images as your company logo.If you use GIF or PNG format, just change the extension to JPEG because it is required for its use in PDF files.

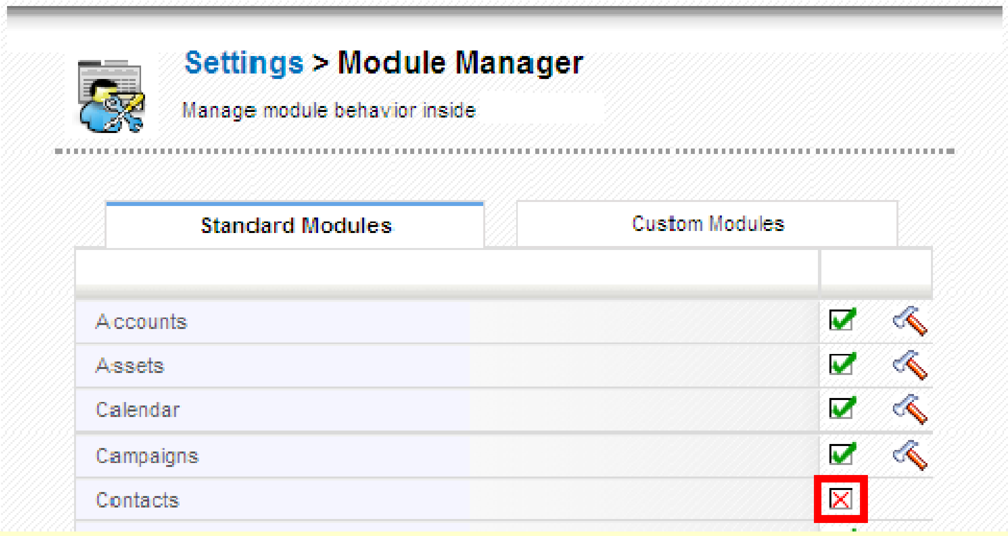
Choose Modules

CRM includes a flexible framework with over 20 modules covering *Sales*, *Support*, *Marketing*, *Inventory*, *Projects*, *Calendar* and more. Using the ***Module Manager***, you can enable, disable and configure the settings for each module. You can also import new modules from the ***Module Manager***.

Steps to configure modules in **CRM**: Go to CRM Settings Icon > ***CRM Settings*** > ***Module Manager***. Click on green tick mark icon, highlighted below, to disable the module(s) that you would not plan to use.



Click on red cross mark icon, highlighted below, to enable the module.



If you want to limit certain modules to only some users, you can use ***Profiles*** in the ***Users Management*** section.

Configure Fields

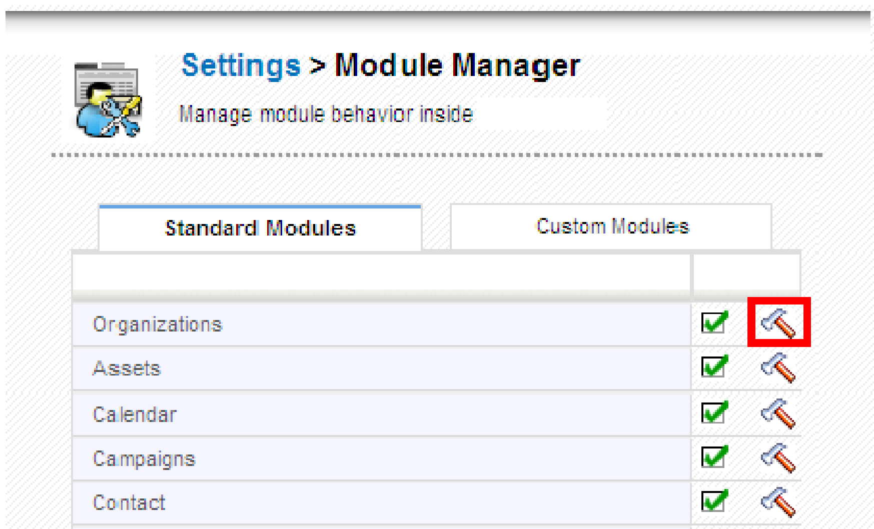
Fields

CRM offers a set of default fields. You can add new custom fields, re-arrange fields, edit field properties, and move fields inside and across blocks.

Steps to configure fields in **CRM:**

1. Go to ***Settings*** > ***Module Manager.***
2. Click on module settings icon, highlighted below, at extreme right of each module.
3. Click ***layout editor.***

Configure a specific field; for instance, *Organizations*



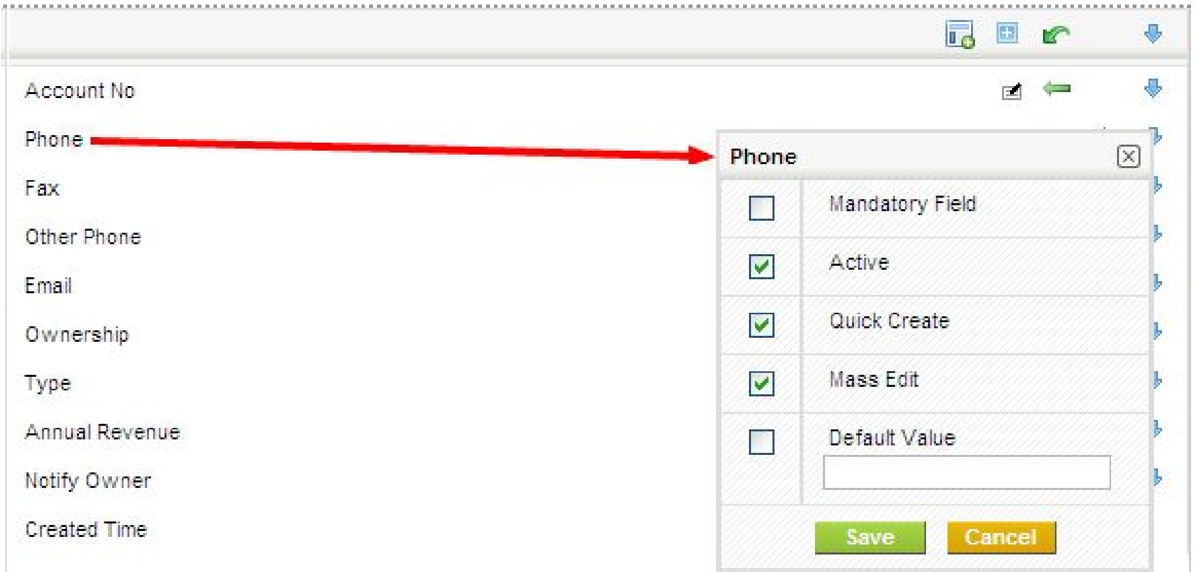
Now click ***Layout Editor***

Re-arrange fields

You can re-arrange fields within a block using the arrows provided for each field as shown below.

Edit field properties

You can change some of the properties of a field by clicking on the edit icon provided for each field.



Mandatory field	This field will be made mandatory for the Users to fill in.
Active	If enabled, displays the field or else hides the field.
Quick Create	The field is available in the quick create of the module.
Mass Edit	If enabled, the field is available for mass edit.
Default Value	Used to set a default value in a field.

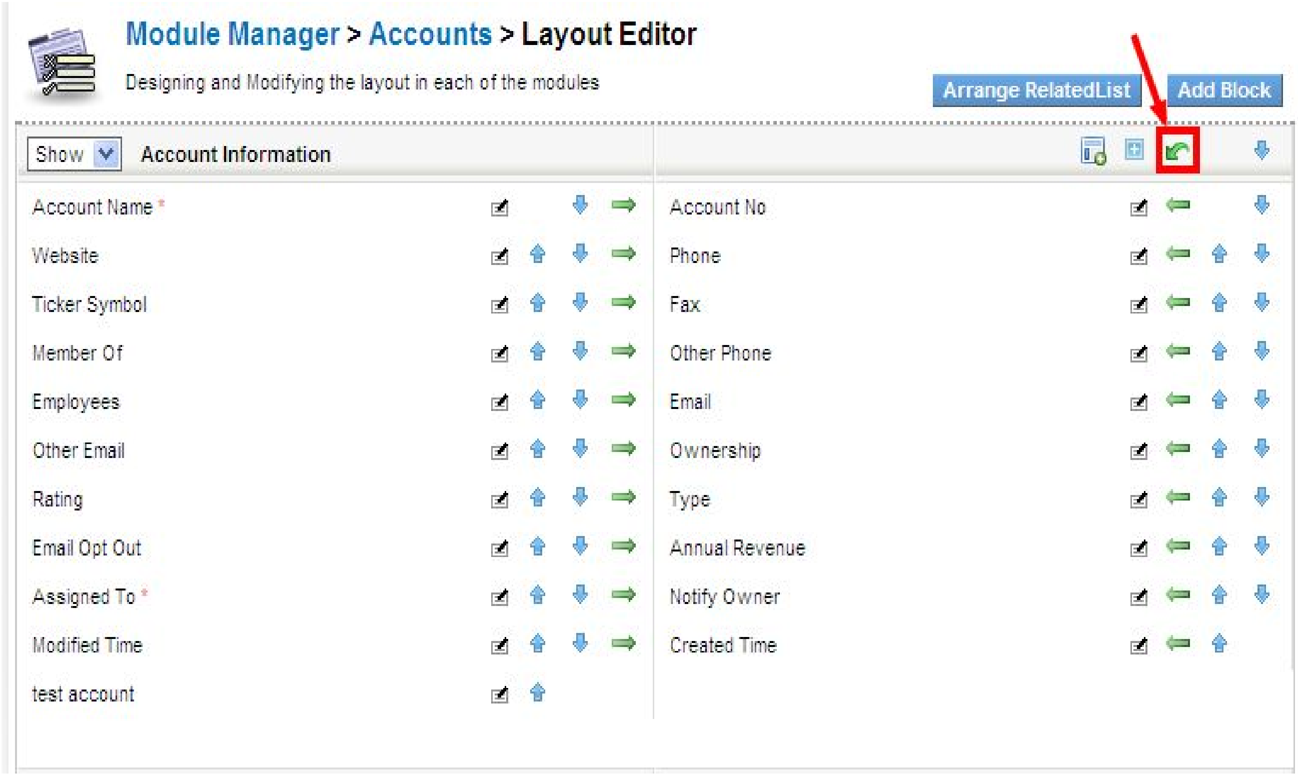
Some Checkboxes are disabled in some fields, because their properties cannot be edited (which otherwise can lead to inconsistency in the CRM).

Add custom fields

You can add custom fields to any block by clicking on the icon highlighted below.

Move fields

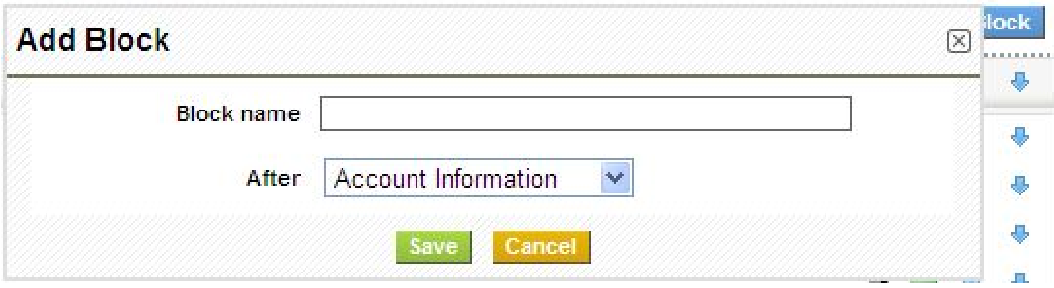
You can move fields from one block to another. When you click move-field Icon, highlighted below, a popup will appear which will show the list of fields from other blocks. You can select field(s) and click ***Apply*** to save changes.



Blocks

Blocks contain set of custom Fields. You can hide the unwanted blocks. Also, you can create a new custom block and place it at any desired location among blocks.

For instance, create new block 'More info', next to Contact information block.

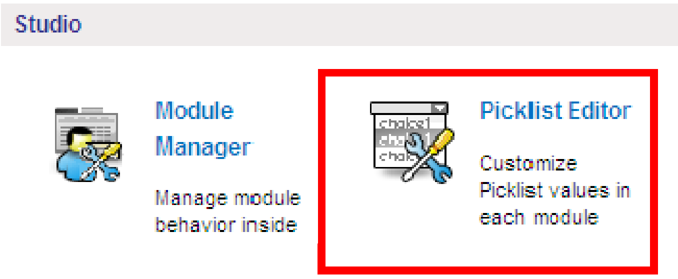


Modify Picklist Values

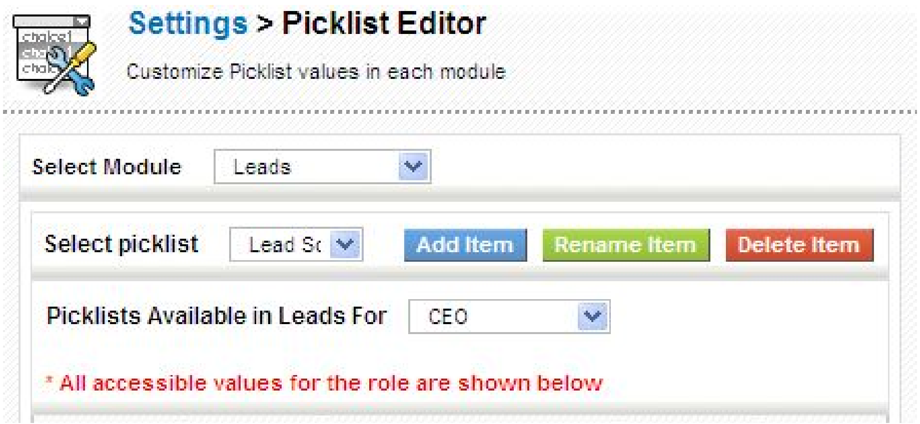
As the name itself says, picklist is a dropdown field with list of options available, within which, only one option can be selected. For instance, *Lead status* in *Leads* module. ***Picklist Editor*** can be used to customize the picklist values in different modules. Select a role before performing global actions such as add, edit and, delete; as the picklist values vary across roles.

Steps to customize your picklist values in **CRM**:

Go to ***Settings*** > ***Picklist Editor***(This can be found under studio block)



To customize picklist, select desired module from ***Select Module*** dropdown (ex:*Leads*); consequently, ***Select picklist*** dropdown displays respective picklist fields (*Industry*, *Lead Source*, *Lead Status*, *Rating*, *Salutation*) available for that module. This dropdown can be used to select the picklist field for performing global actions.

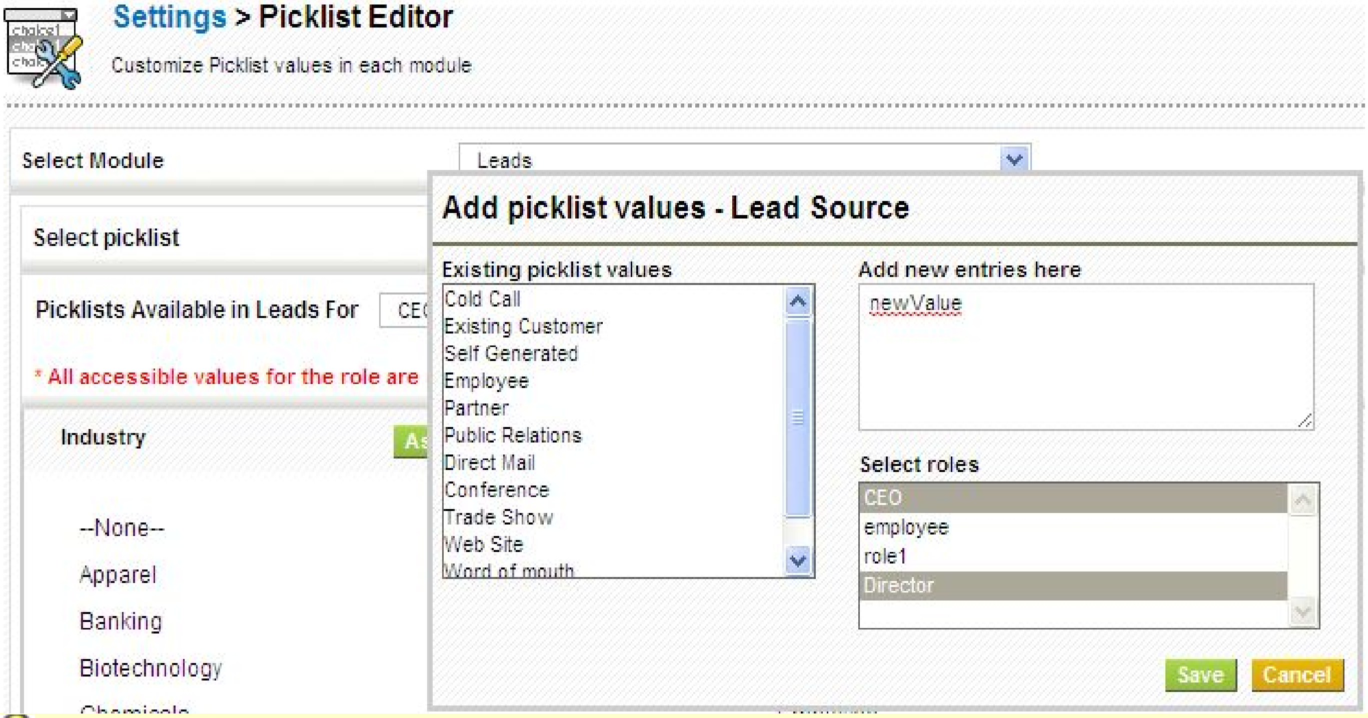


Add new values to picklist

1. Click on the ***Add*** button next to the ***Select picklist*** dropdown.
2. This will bring up a popup with the existing picklist values displayed on the left-hand side.
3. You can add new values in textarea on top-right and assign role(s) on right hand lower side of the popup accordingly.
4. Click ***Save*** to save your changes.

You can add multiple values and assign multiple roles at the same time

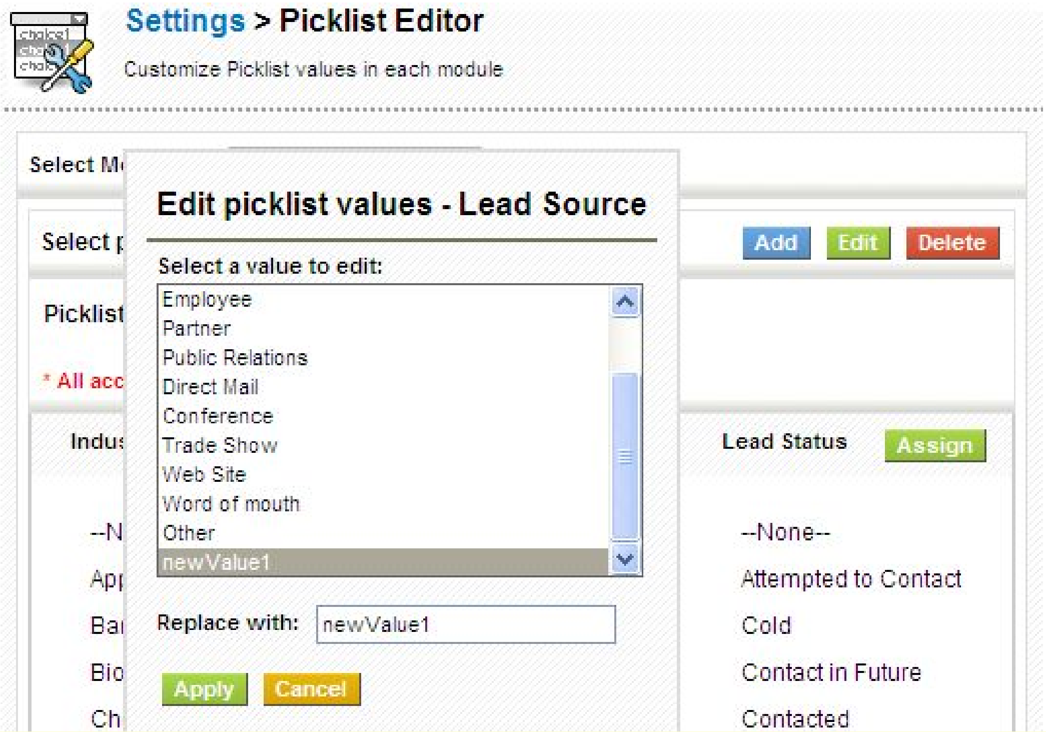
For instance, add 'newValue' to *Lead source* field in *Leads* module



If you don't select any role for the new picklist values, they will be present in the picklist values but not displayed for any role (other than admin).

Edit picklist values

1. Click on the ***Edit*** button next to the ***Select picklist*** dropdown.
2. This will bring up a popup with the existing picklist values in select box.
3. select a picklist value you intend to edit.
4. you can edit the picklist value in the textbox below the existing picklist values.
5. Once you are done with the changes, click on the ***Apply*** button to save your changes to the picklist.



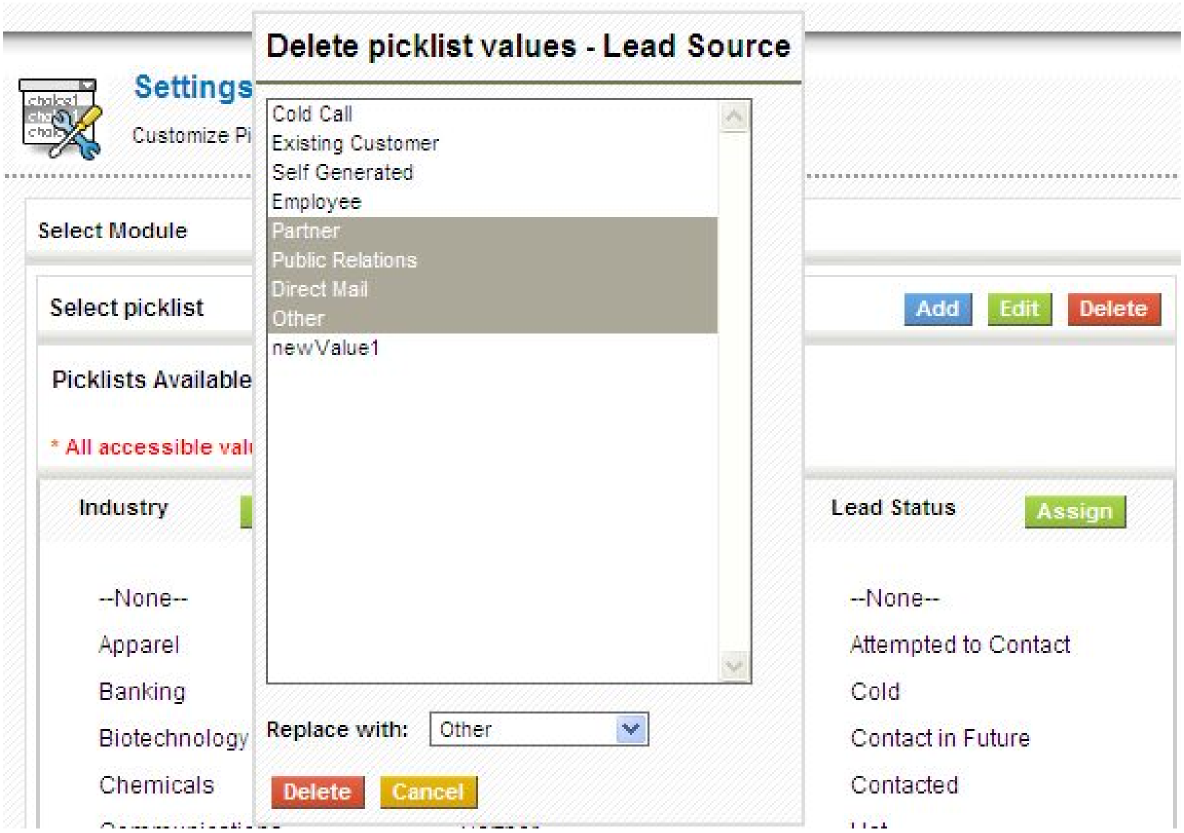
It cannot be replaced with empty value

Delete existing picklist values

1. Click on the ***Delete*** button next to the ***Select picklist*** dropdown.
2. This will bring up a popup with existing picklist values.
3. Delete one or multiple values and select a value from ***Replace with*** dropdown, to replace all the values with that name.

You cannot select a blankvalue for replacement

For example, delete picklist values(Partner,Public Relations,Direct Mail,other) and replace with 'Other'.



Deleted picklist values will be replaced with another value. The information stored in deleted values will be moved to newly defined value.

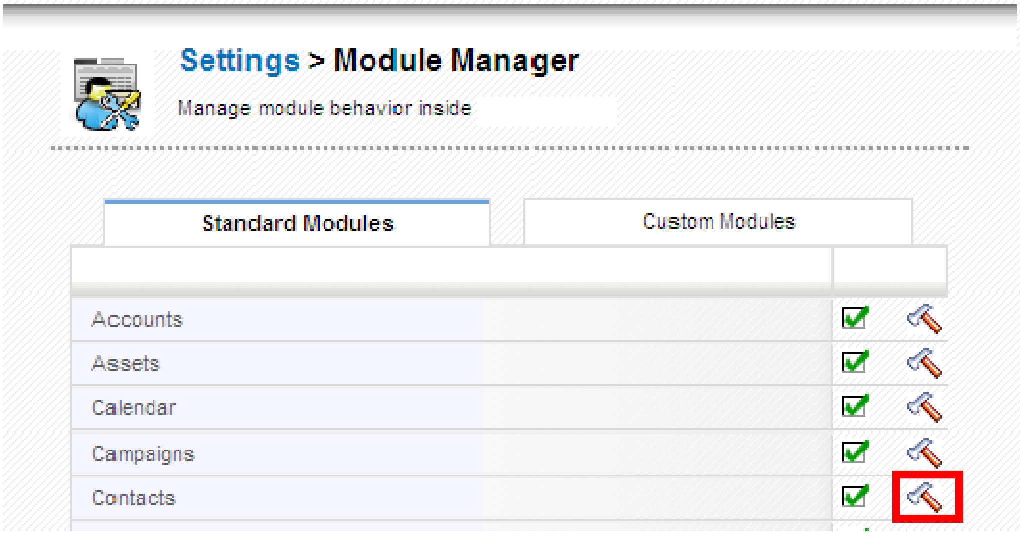
You should have at least one value in picklist.

CRM also allows users to create new custom picklist fields using Custom Fields.

Steps to create new custom picklist field in **CRM**:

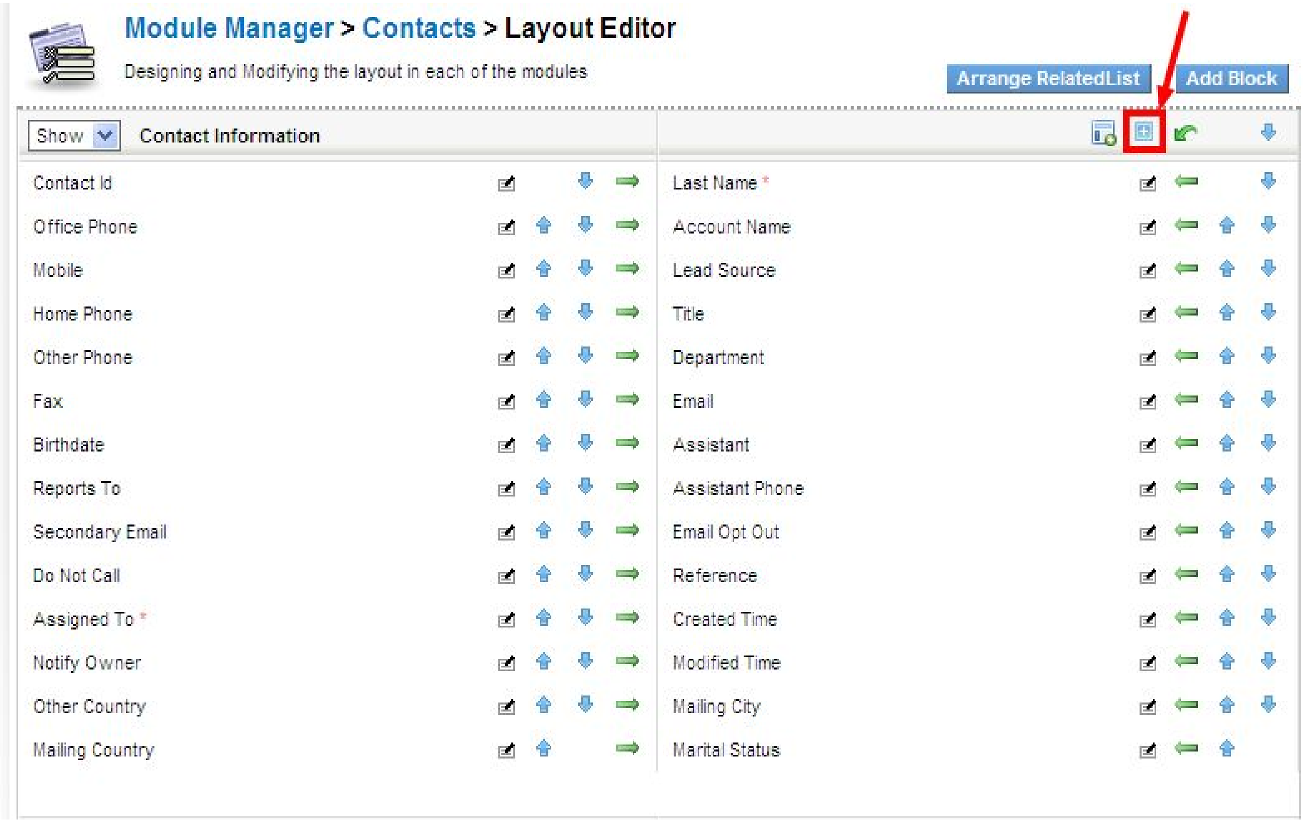
1. Go to ***Settings*** > ***Module Manager***

2. Click on module settings icon, highlighted below, at extreme right of each module.

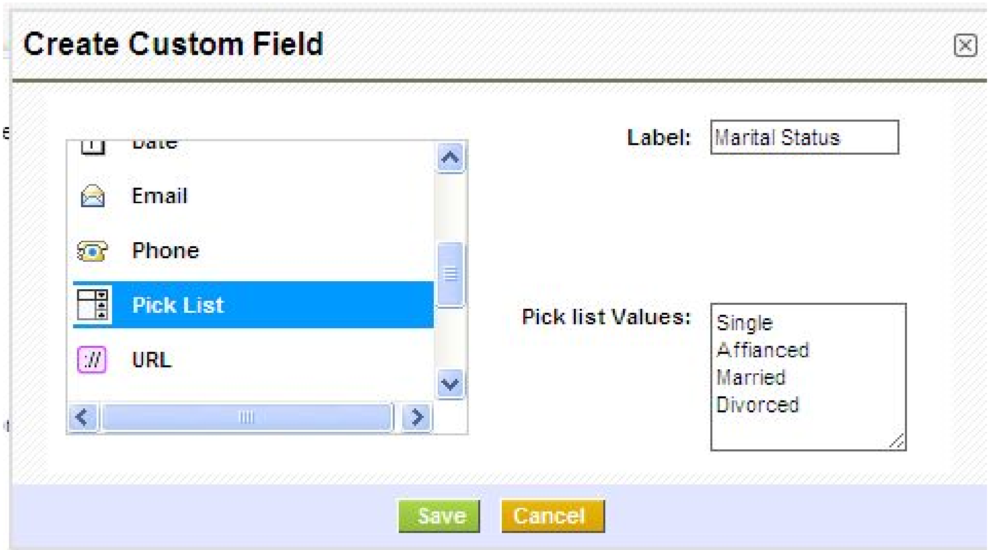


3. Click on ***Layout Editor***

4. Click on add custom field icon, highlighted below.



5. Select field type as *Pick List* on left hand side, provide a picklist name in ***Label*** on top-right, and provide values in ***Pick list Values*** textarea on right hand lower side of the popup.



Setup Users

CRM provides a dynamic role-based security. Managing users is done for the purpose of security by restricting user's access to specific modules, fields and to each other's data. Using ***Roles***, administrators can control access to specific records and by using ***Profiles***, they can control the actions the users can perform on those records. **CRM** system offers a privilege system that is based upon the following simple looking rules:

Who can view certain record?
Who can edit certain record?
Who can delete certain record?
Who can create certain record?

Configure Module Level Sharing Rules

You can configure module specific sharing rules with ***Sharing Access***. You can be able to hide or restrict user's access on records with-in a module. Sharing can be set to public (all users view all the records in the module), or private (only users with higher role than the record owner will be able to view the record).

The table explains different options in ***Sharing Access:***

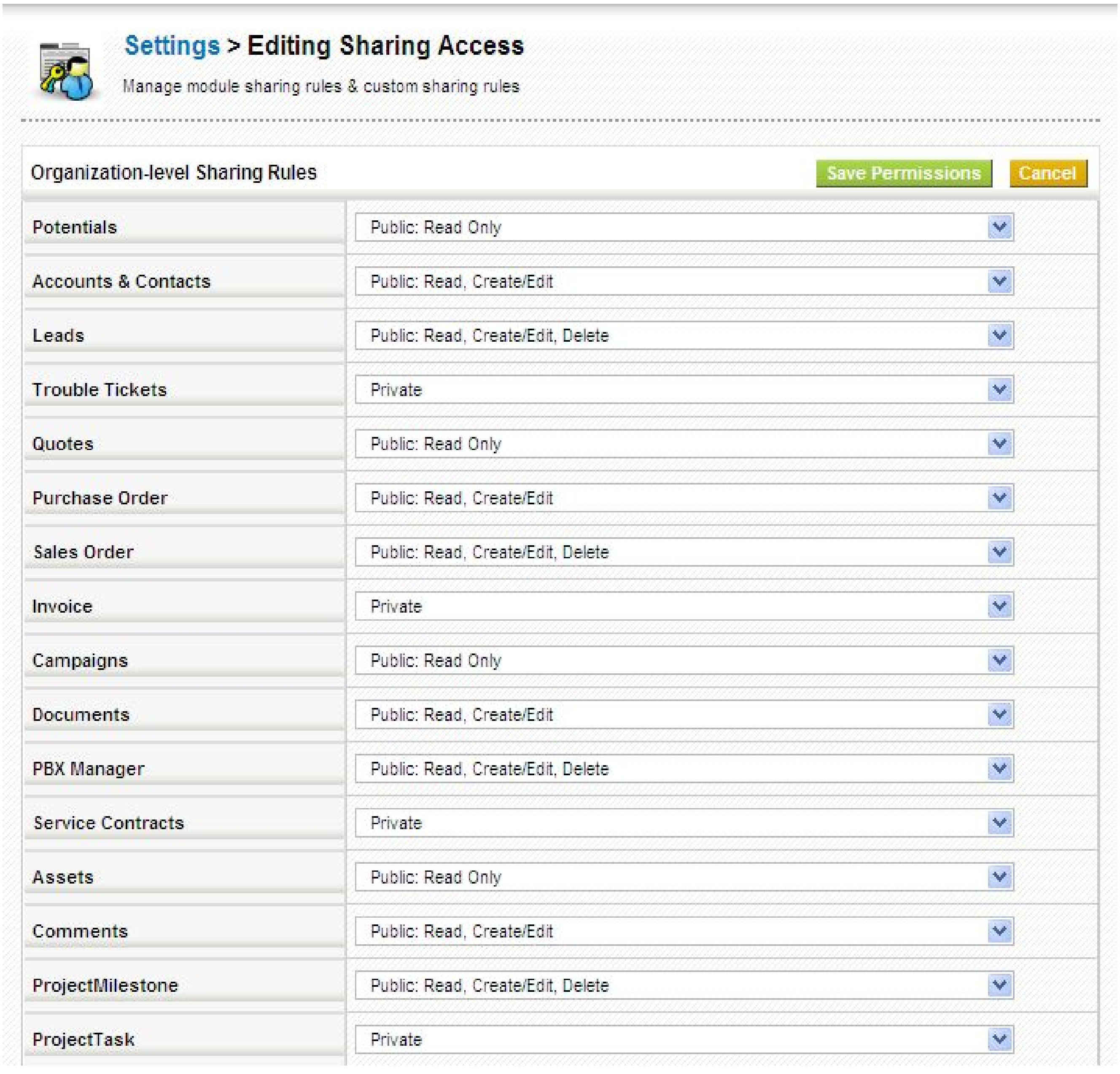
Private	Only the owner and the users with higher role than the owner can access the records
Public (Read Only)	Other users can read, but cannot edit and delete records.
Public (Read, Create/Edit)	Other users cannot delete, but can read, create and edit all records
Public (Read, Create/Edit, Delete)	All Users can do all operations on all records of this module - this is the default setting for all modules (except Calendar)

Steps to configure module specific sharing rules in **CRM**:

Go to ***Settings*** > ***Sharing Access*** > ***Change Privileges***.

Select desired setting for each module.

Click ***Save Permissions*** and then click ***Recalculate.***

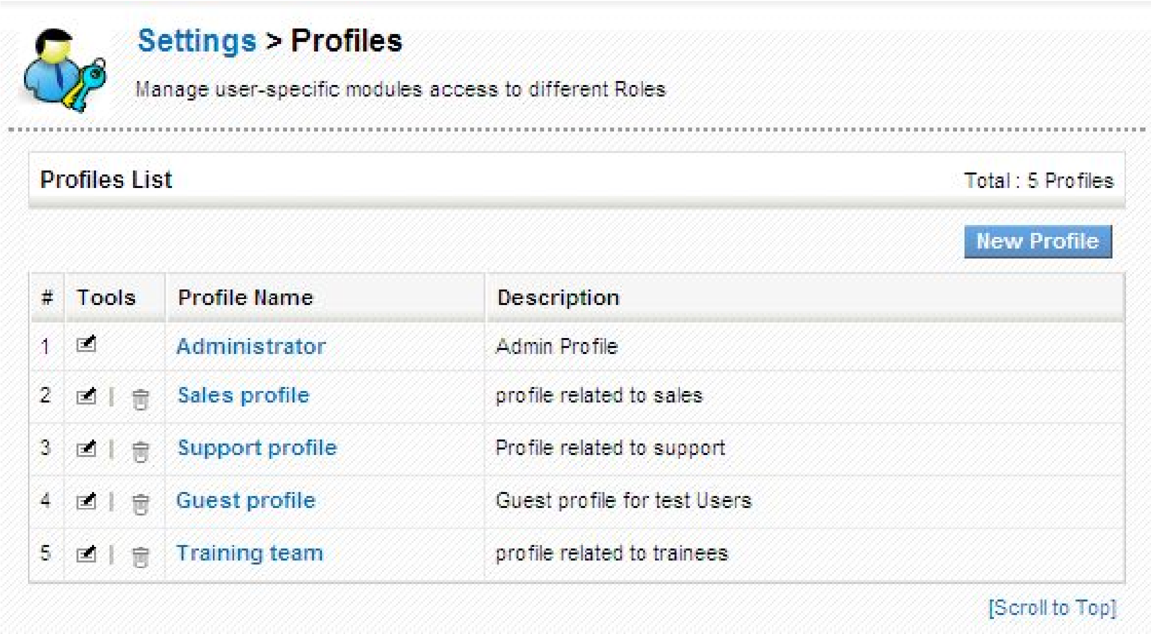


Administrators can also set ***Custom Sharing Rules*** from the ***Sharing Access*** page, if the module specific rules and options do not cover their needs. By using ***Custom Sharing Rules***, admin user can make certain modules of higher hierarchy accessible to role at lower hierarchy.

Configure Profiles

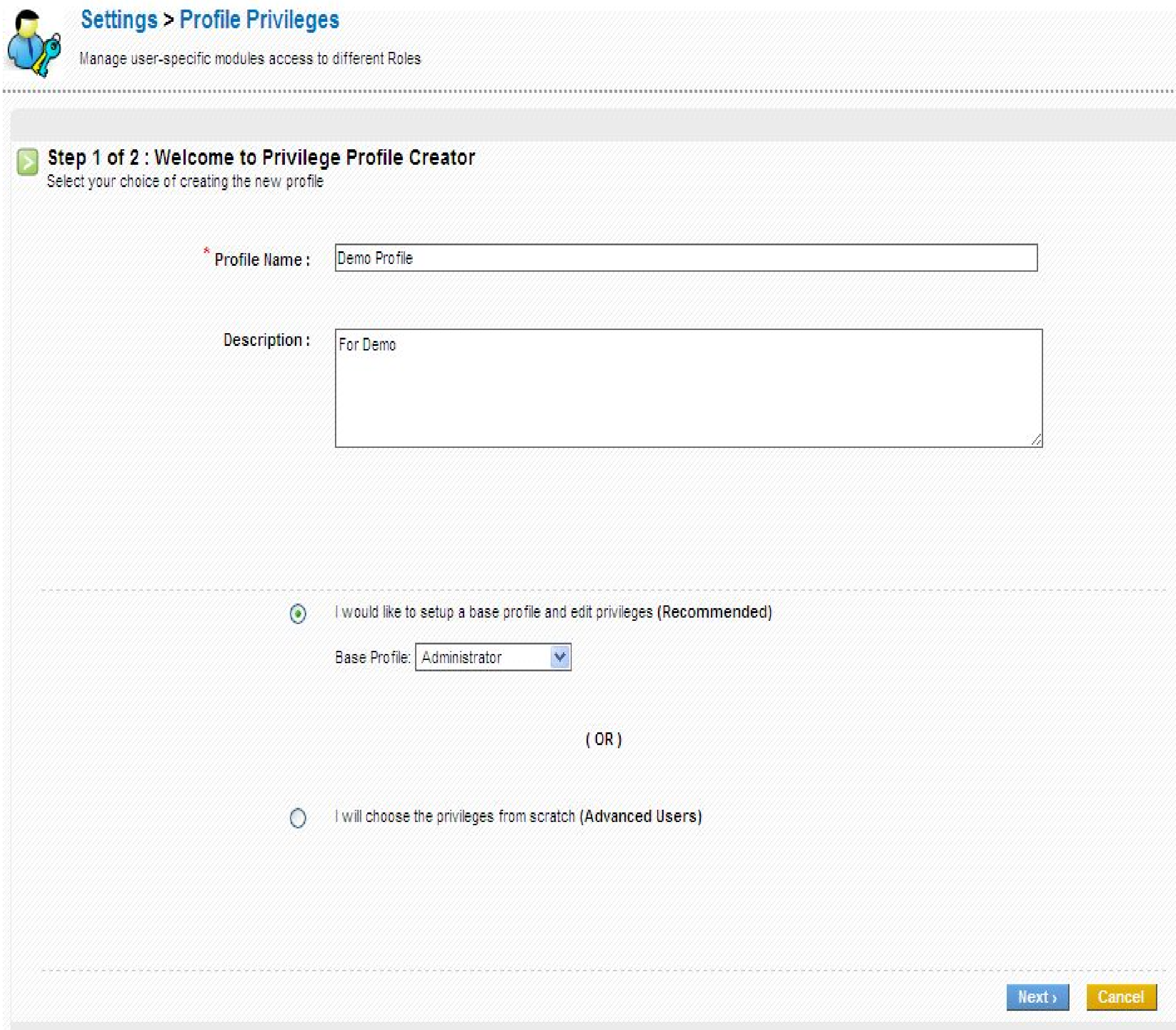
Profiles can be used to regulate user's access on modules, fields, and records within them. With profiles you can set the user privileges to delete, create/edit or view data. Like ***Sharing Access***, profiles also play vital role in ensuring security by limiting the activities on records. Please note that the settings of the global privileges are always superior to the other privilege settings. Roles are based on profiles.**CRM** comes with a set of pre-defined profiles (ex: 'Administrator') which you can use and change but not delete.

List of profiles in **CRM**

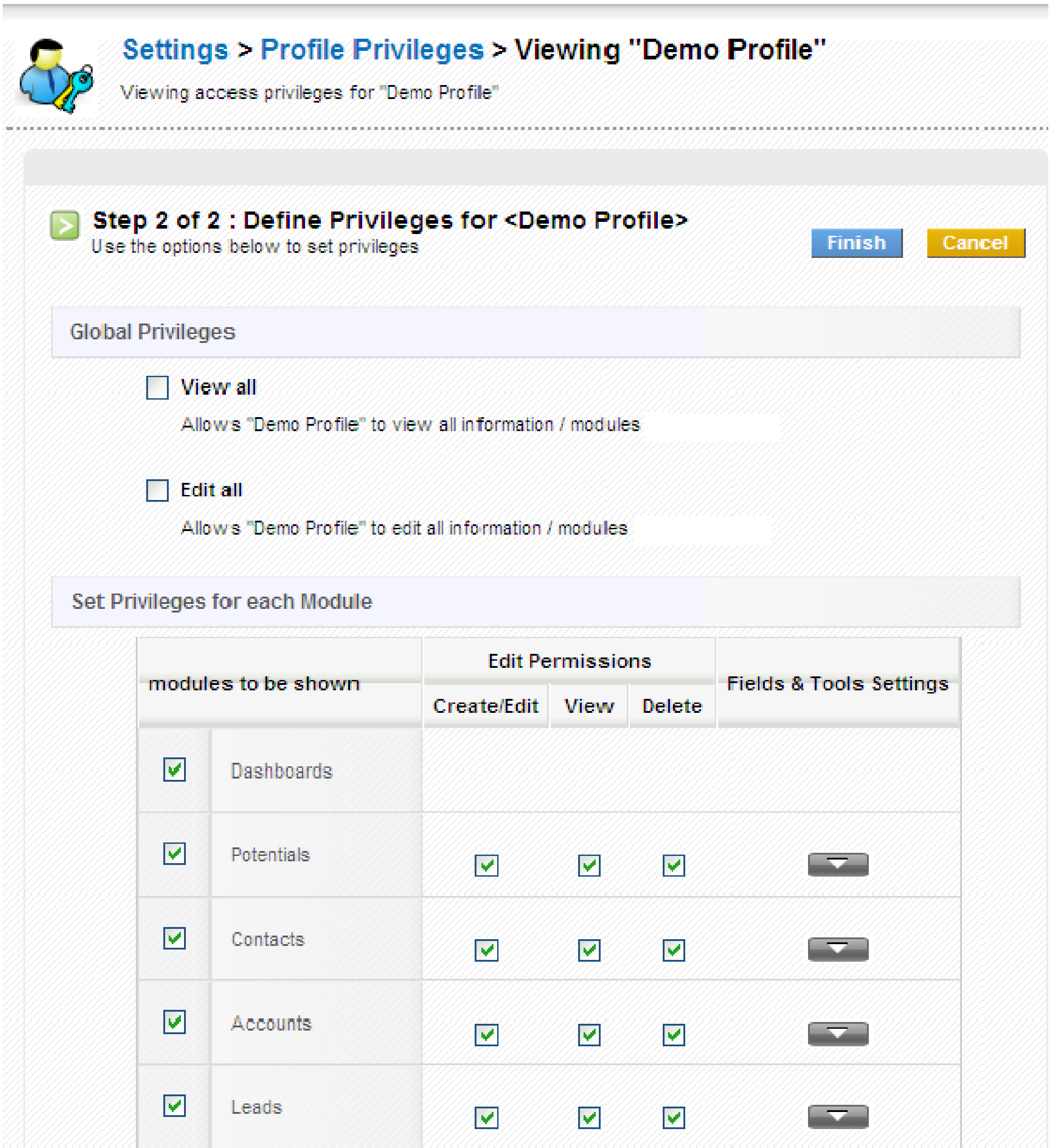


Click the name of a profile to see the details. You may change the profile by clicking the ***Edit*** button. To create a new profile click the ***New Profile*** button at the list view.

Create new profile

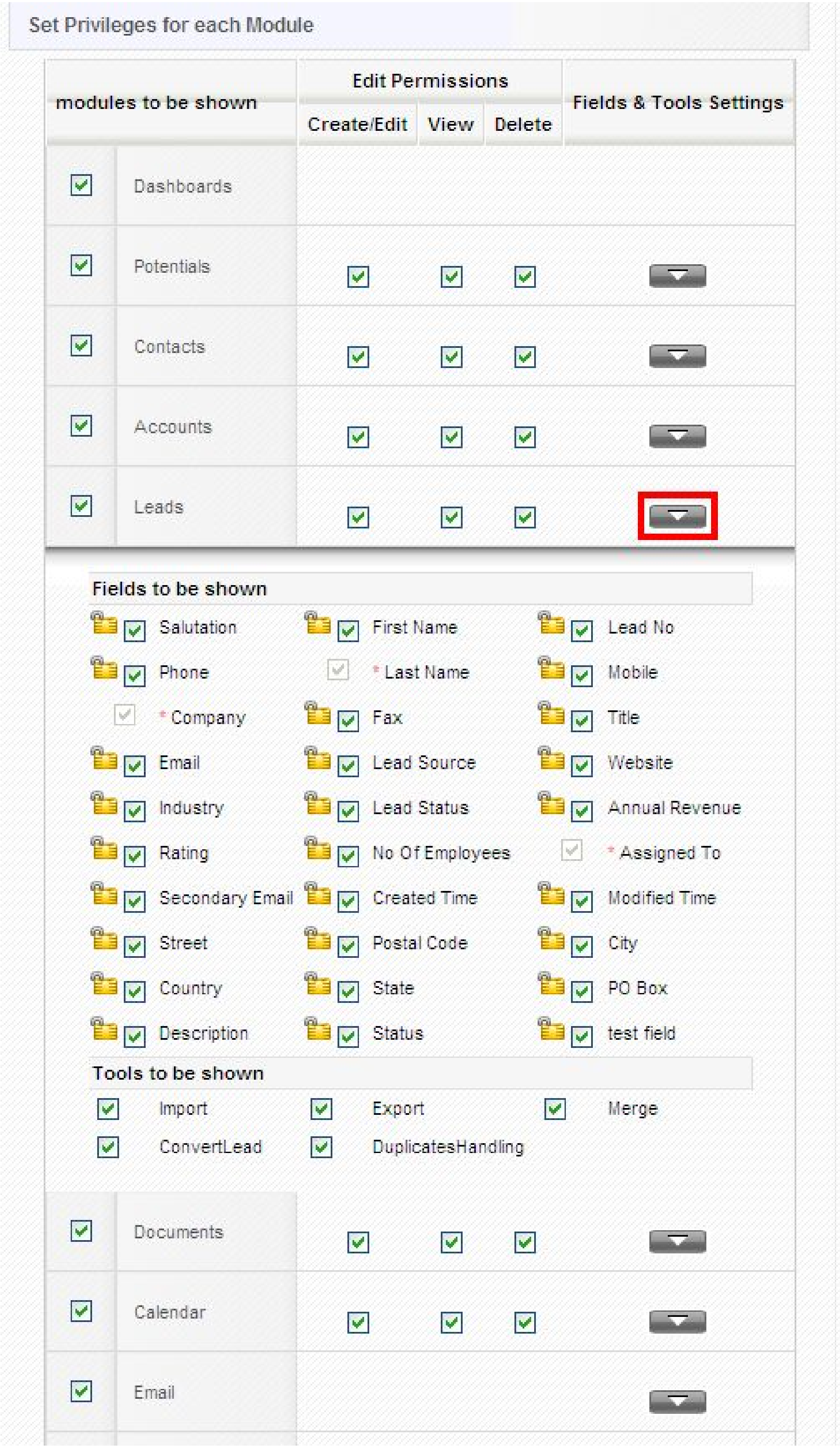


Edit modules in a profile



Edit fields in a profile

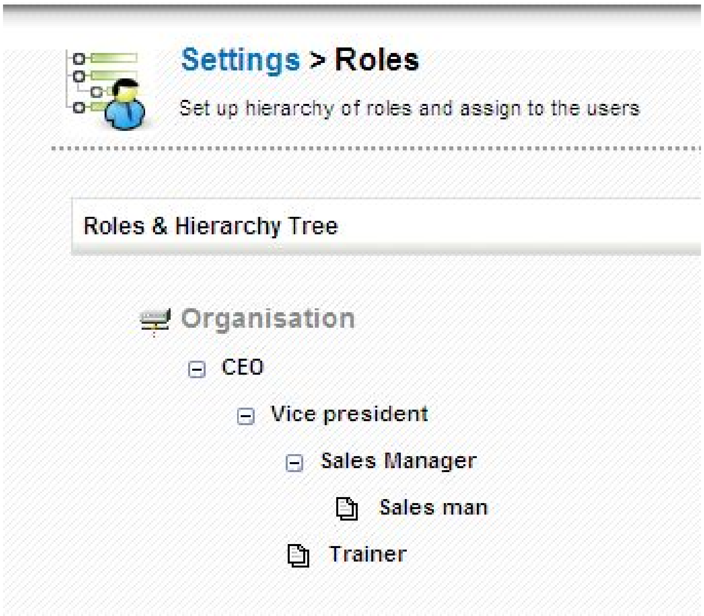
You can edit fields in a module by clicking on icon highlighted below.


Set Privileges for each Module
modules to be shown
Edit Permissions
Create/Edit
View
Delete
Fields & Tools Settings
Dashboards
Potentials
Contacts
Accounts
Leads
Fields to be shown
Salutation
First Name
Lead No
Phone
* Last Name
Mobile
* Company
Fax
Title
Email
Lead Source
Website
Industry
Lead Status
Annual Revenue
Rating
No Of Employees
* Assigned To
Secondary Email
Created Time
Modified Time
Street
Postal Code
City
Country
State
PO Box
Description
Status
test field
Tools to be shown
Import
Export
Merge
ConvertLead
DuplicatesHandling
Documents
Calendar
Email

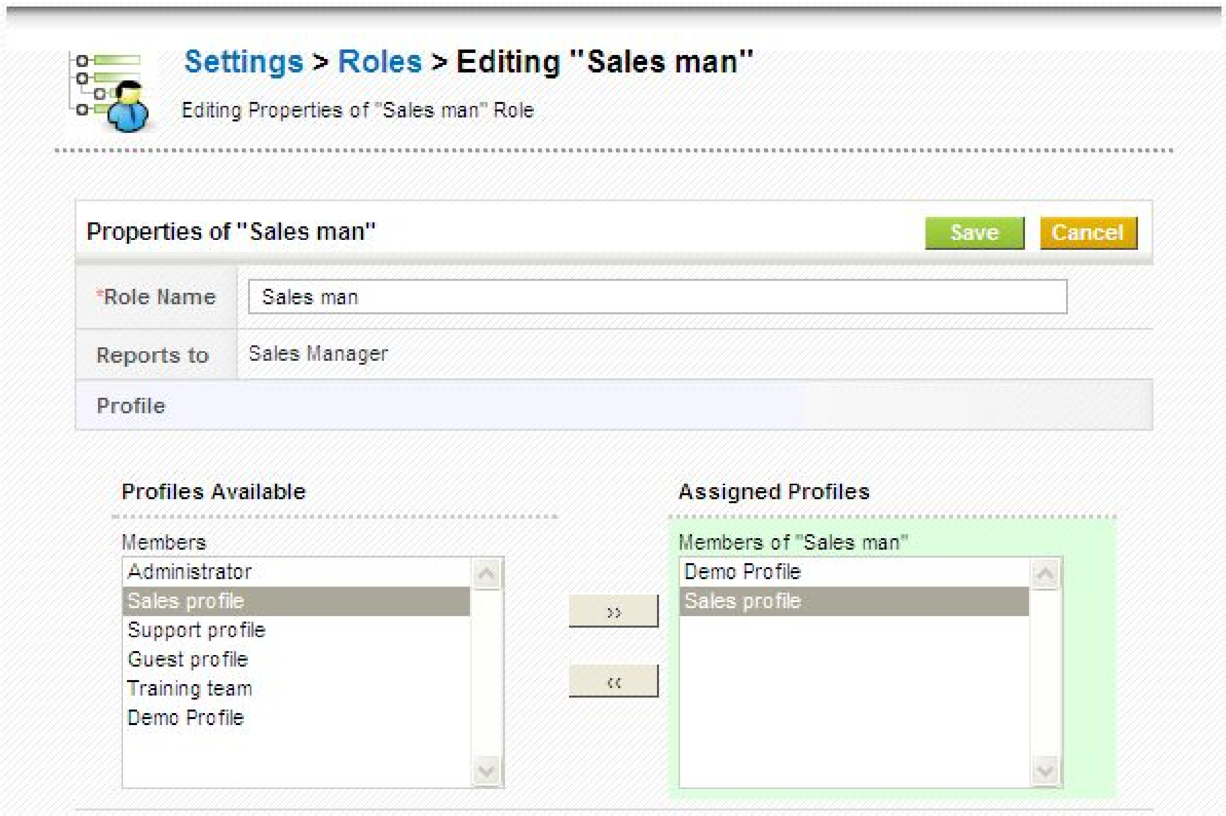
Click ***Finish*** to save your settings.

Configure Role Hierarchy

When sharing access for a module is set to private, a user's role in the role hierarchy determines what records he/she can access. A user can only view own records (i.e., records assigned to that user), and records assigned to users with a lower role. Role holds a position in a company (ex: sales manager) and can be assigned to multiple users of same functionality. A role can also be assigned to multiple profiles. This can come handy if same person holds two different positions. For instance, 'Rahul' is a Sales manager, but he also participates in support operations; therefore, you could create a role called 'sales and support manager' and assign both support and sales profiles to him. Each role also specifies who they report to, creating a hierarchy.



By moving your computer mouse pointer over a role entry, you can be able to see set of icons by which you can perform operations such as add, edit, move and, delete roles. The "+" function creates a new role which is located in the hierarchical order one level below an existing role. The image below displays a sample for an edit view of an existing or new role. You have to give an unique name and assign desirable profile(s) to the role.

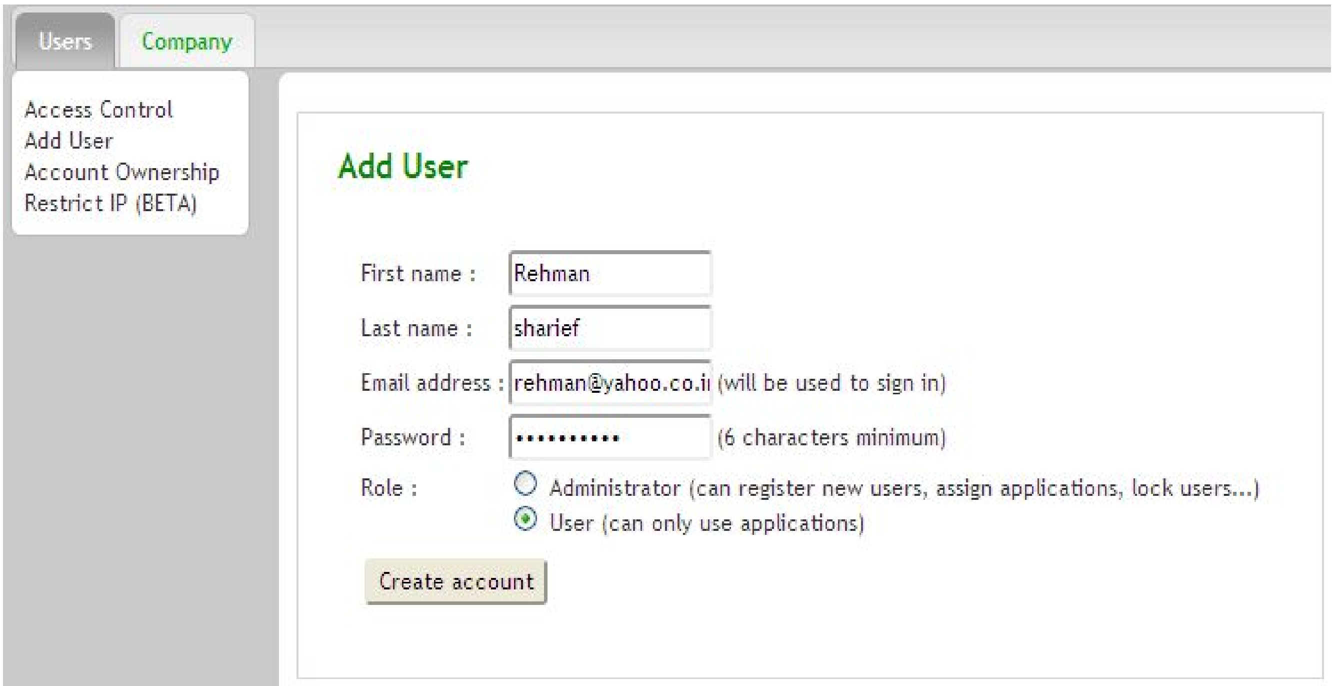


Add Users

CRM features two types of users: Administrator has access to register new users, assign applications, lock users etc; and User, has limited access and can only use applications assigned by admin. When adding a user you should select the role. Privileges of a user depend upon the role you would assign. You can also set admin privileges; it then, gives access to *Settings* page. User privileges are not shown. User information cannot be visible to other users. Access privileges of a user also depend upon settings enabled in ***Sharing Access***.

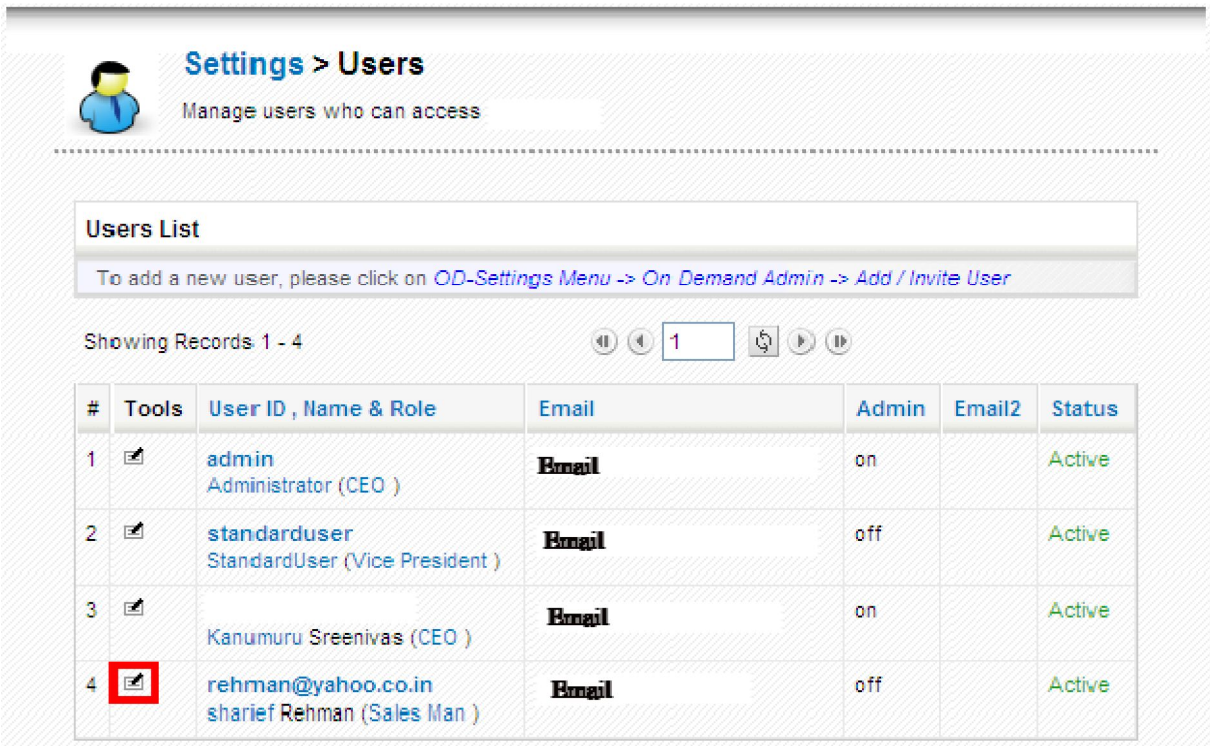
To add new users in CRM, Go to ***OD Settings*** > ***OD Admin*** > ***Add User***.

Fill up the fields in Add User block, and click ***Create account*** to update your details.

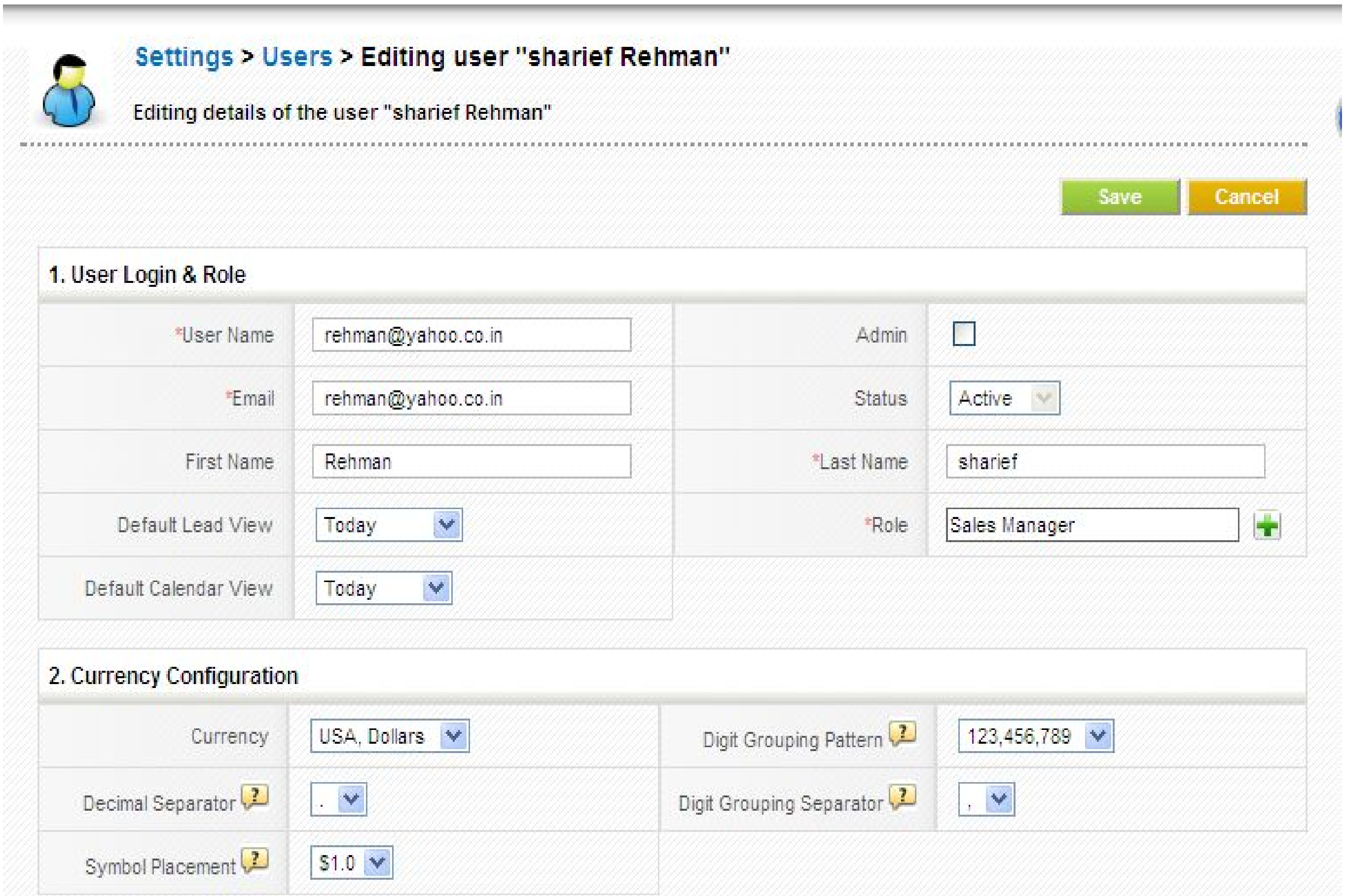


To activate **CRM** service, click on X mark icon, highlighted below, under service and click ***assign***.

Click on edit icon, highlighted below, to edit user information.



Update user information, assign a role and click on ***Save***, to save your details.



Each additional user will add $12 to your monthly bill. If the user is deleted monthly bill is reduced by $12

To create a new user in **CRM open source**, go to ***Settings*** > ***Users*** > ***New User***. Fill up the fields, assign a role and click ***Save*** to update your changes.

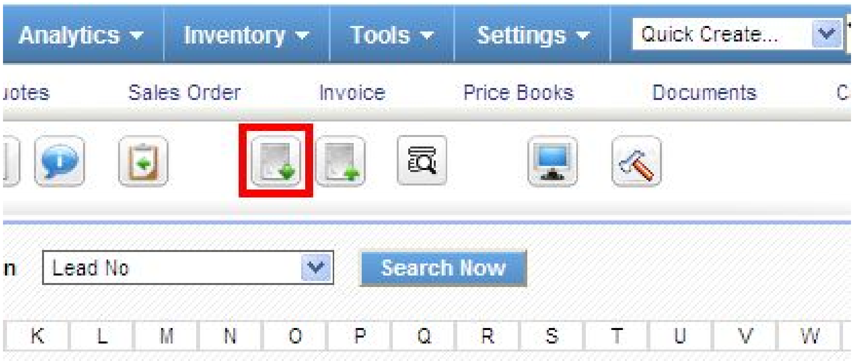
Import your existing data

CRM offers a supportive tool to import customer data such as *Leads, Contacts, Accounts, Potentials, Services, Trouble Tickets, Service Contracts, Products,* and *Vendors* from CSV files.

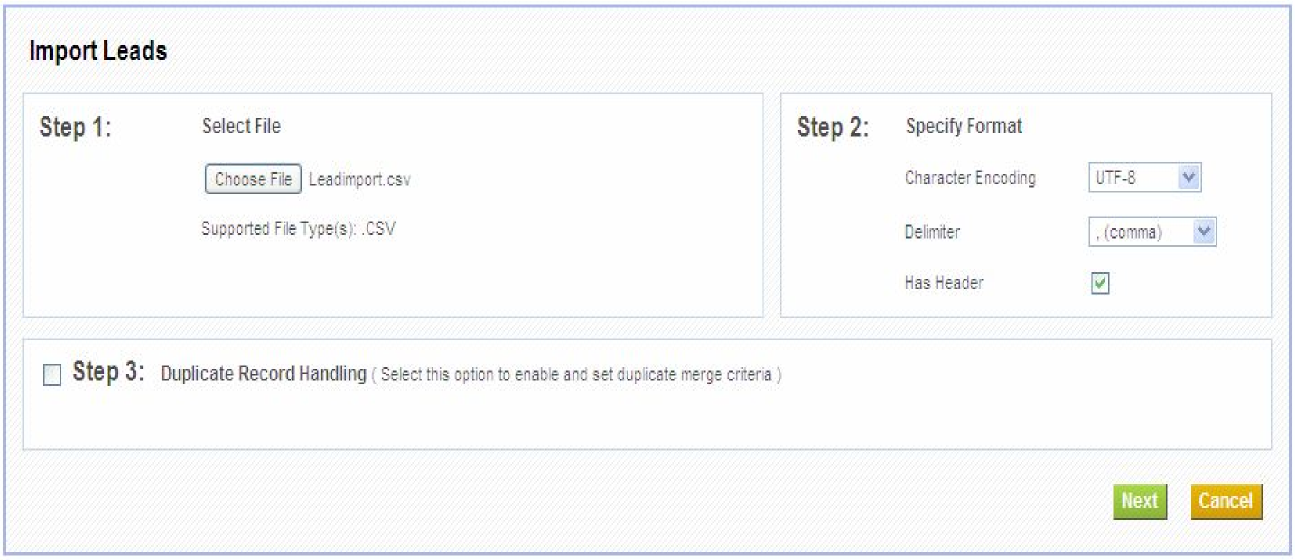
Few simple steps to import your customer data in **CRM**(example:*Leads*)

Go to *Sales* > *Leads*.

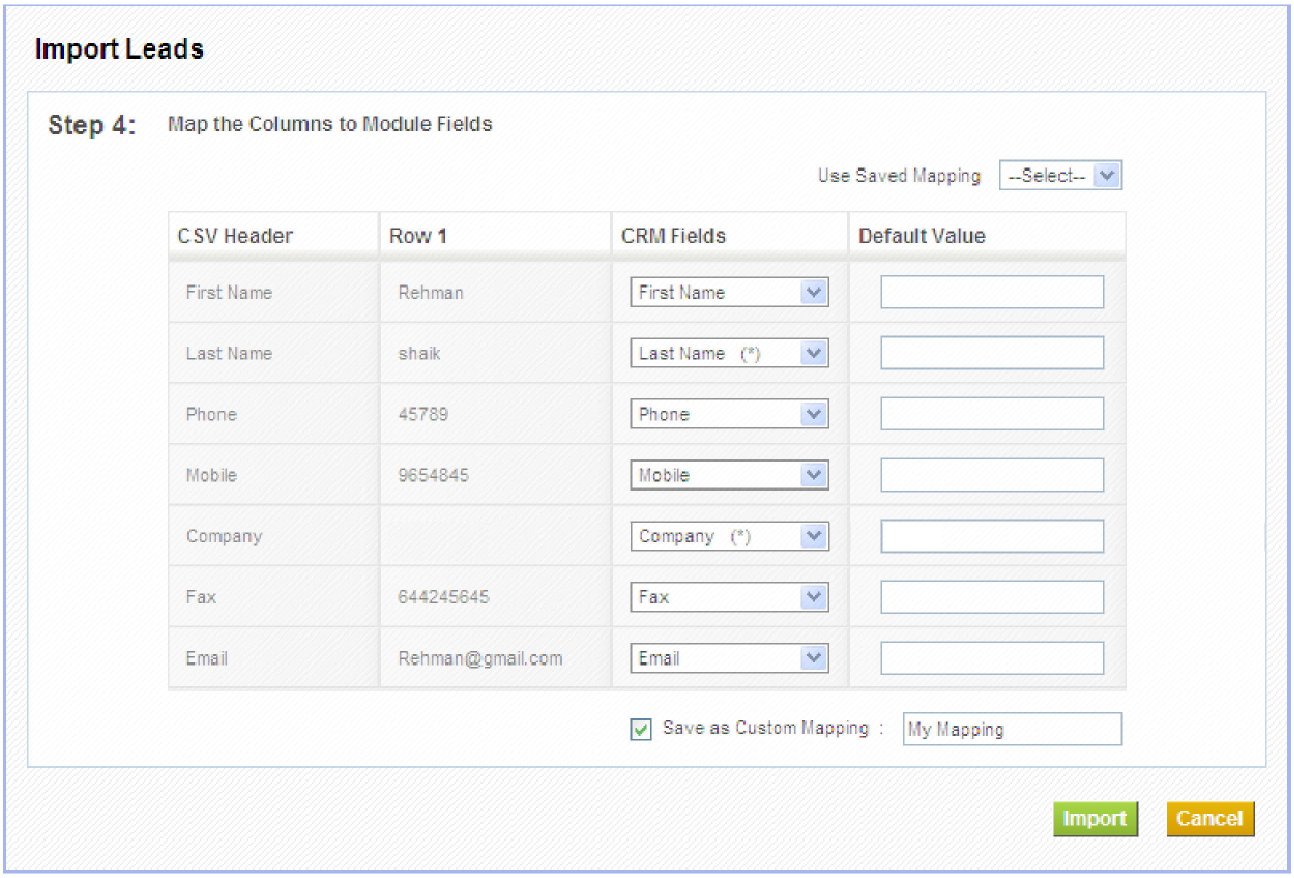
Click on import icon, highlighted below, to start importing customer data.



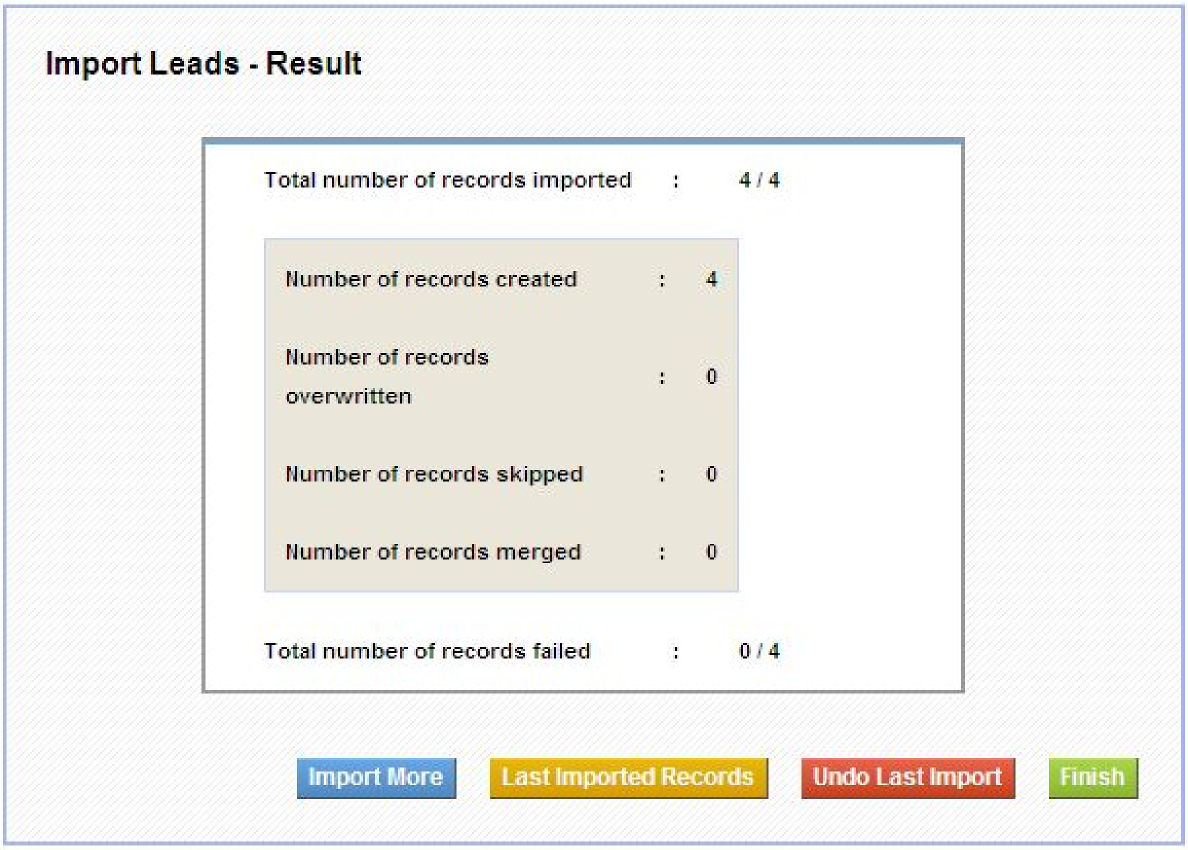
Click ***Choose File*** and browse for the .csv file that you want to upload and click on ***Next***



Enable ***Save as Custom Mapping*** and provide a name if you'll be using identical mapping many times in future; t then, appears in ***Use Saved Mapping*** picklist. You can provide a default value in the ***Default Value*** textbox available for each field. Click on ***Import*** to import the data.



History of number of records imported, created, overwritten, skipped, merged and, failed will be displayed after successful mapping.



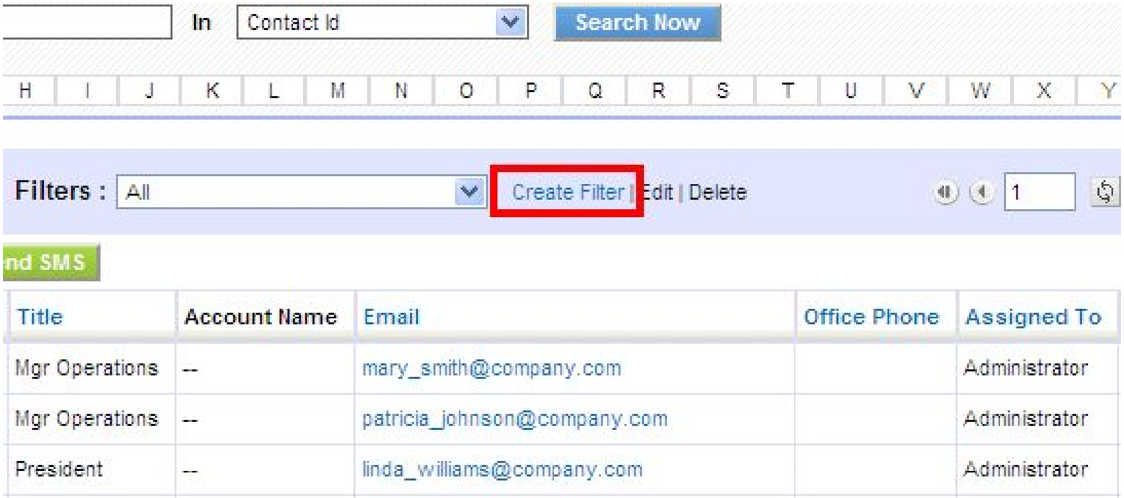
Mandatory fields should not be left unmapped

Create Custom Filters

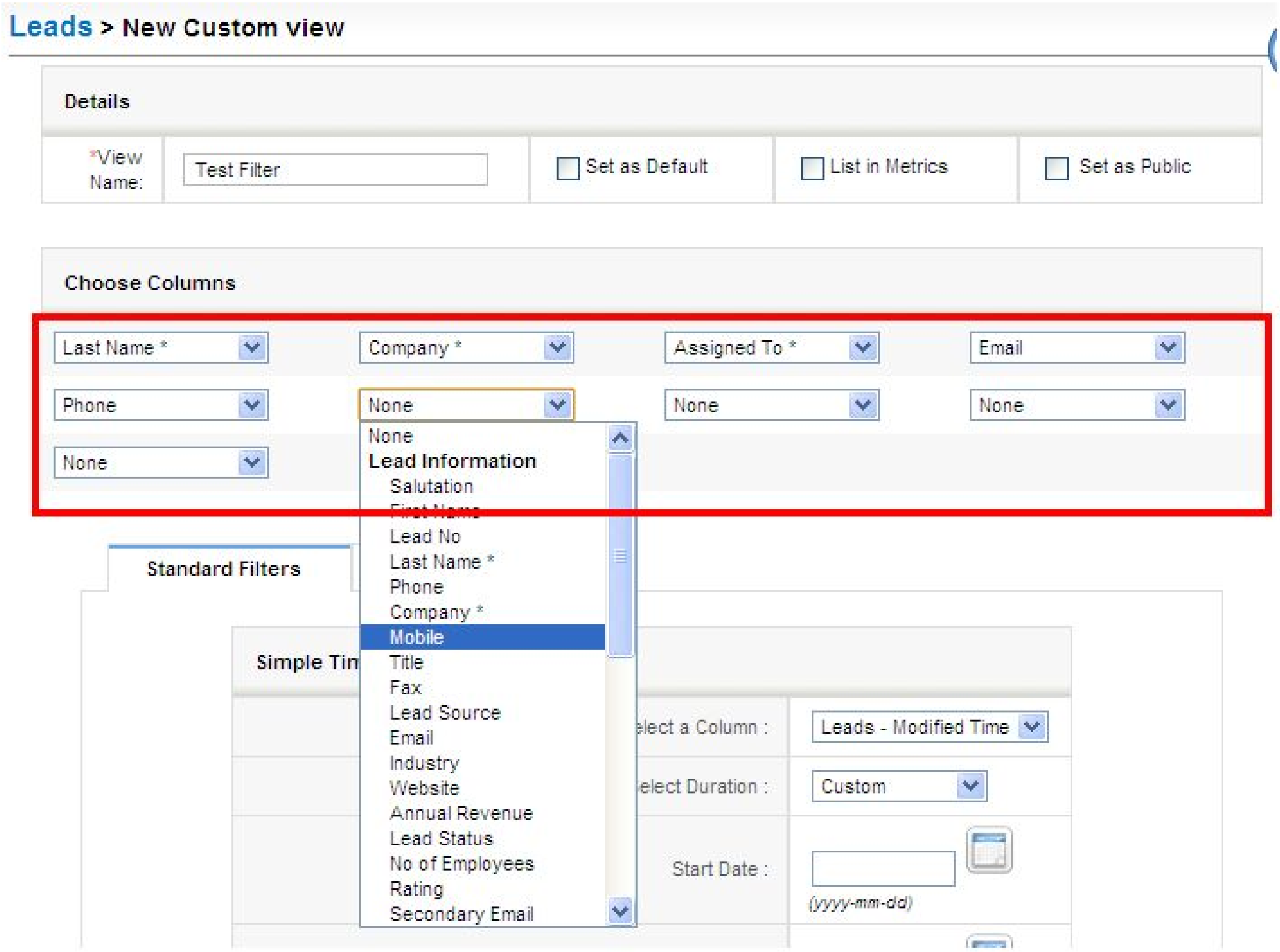
CRM provides an effective search tool that can rapidly filter records in a module. You can be able to limit your search to selected columns and search criteria.

Create a Custom filter

Select a module and click *Create Filter* link (highlighted below) in the listview of a module.

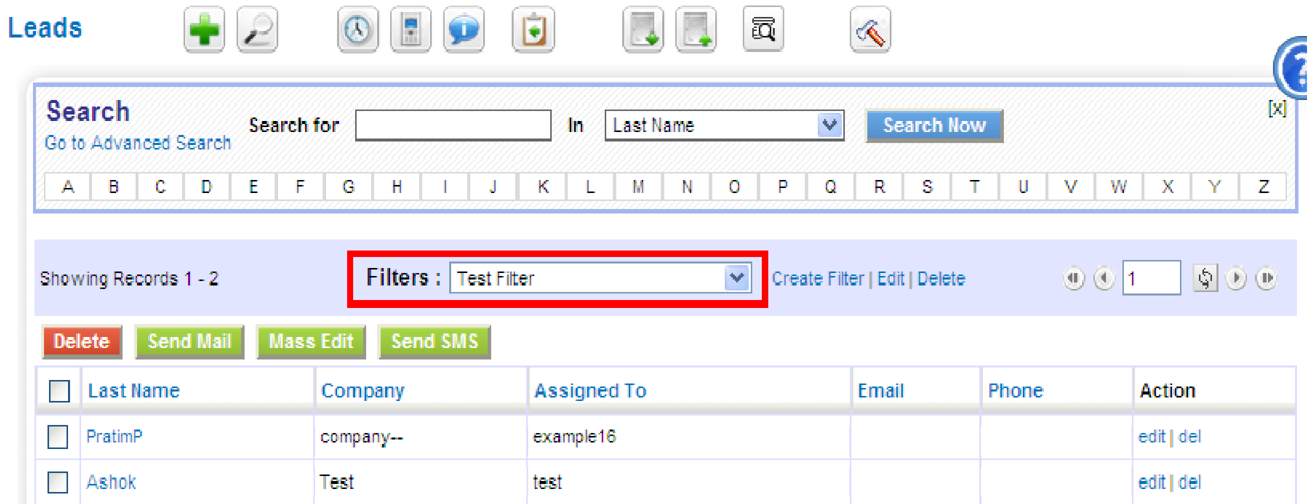


Provide a name to your filter in *View Name* and select the columns that has to be displayed in list view, when filter is selected.



Mandatory fields should be mapped necessarily

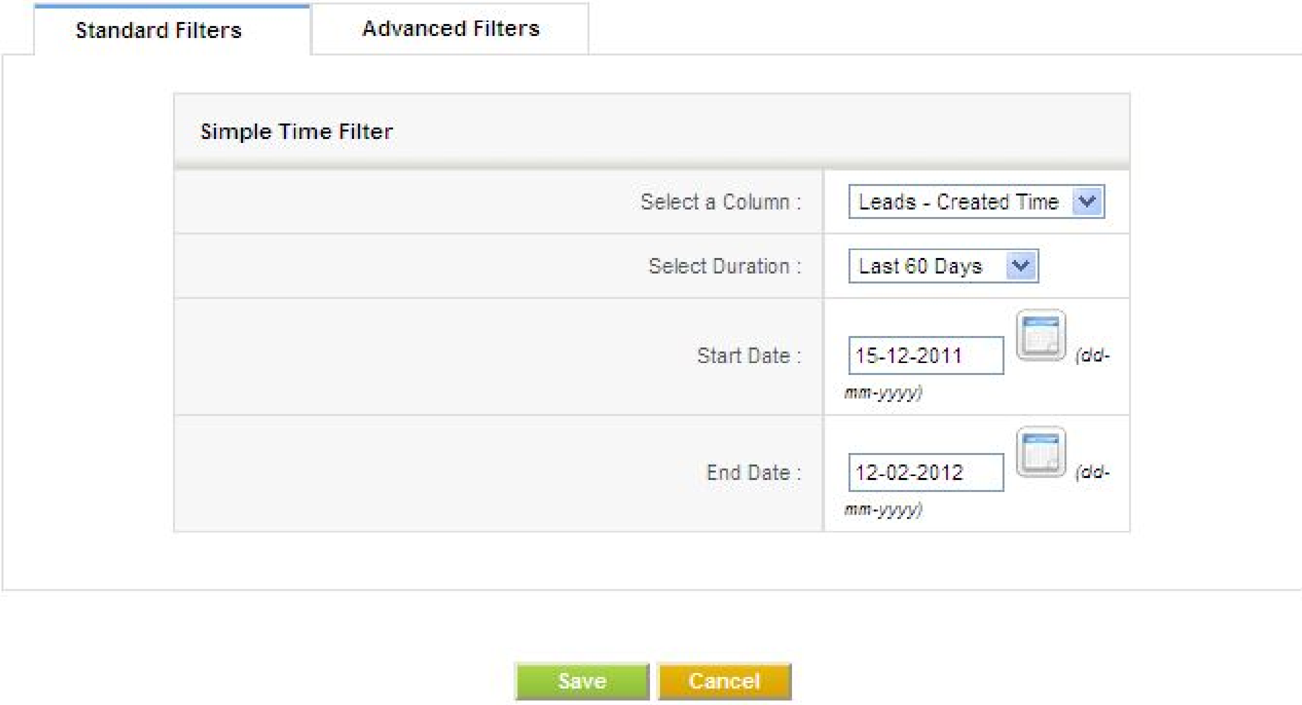
On save you will be able to see filter in action. At this level you can see the list of records in selected columns.



Both ***Standard Filters*** and ***Advanced Filters*** are used to enhance and refine your filter.

Standard Filters refine the search depending upon date intervals or particular period.

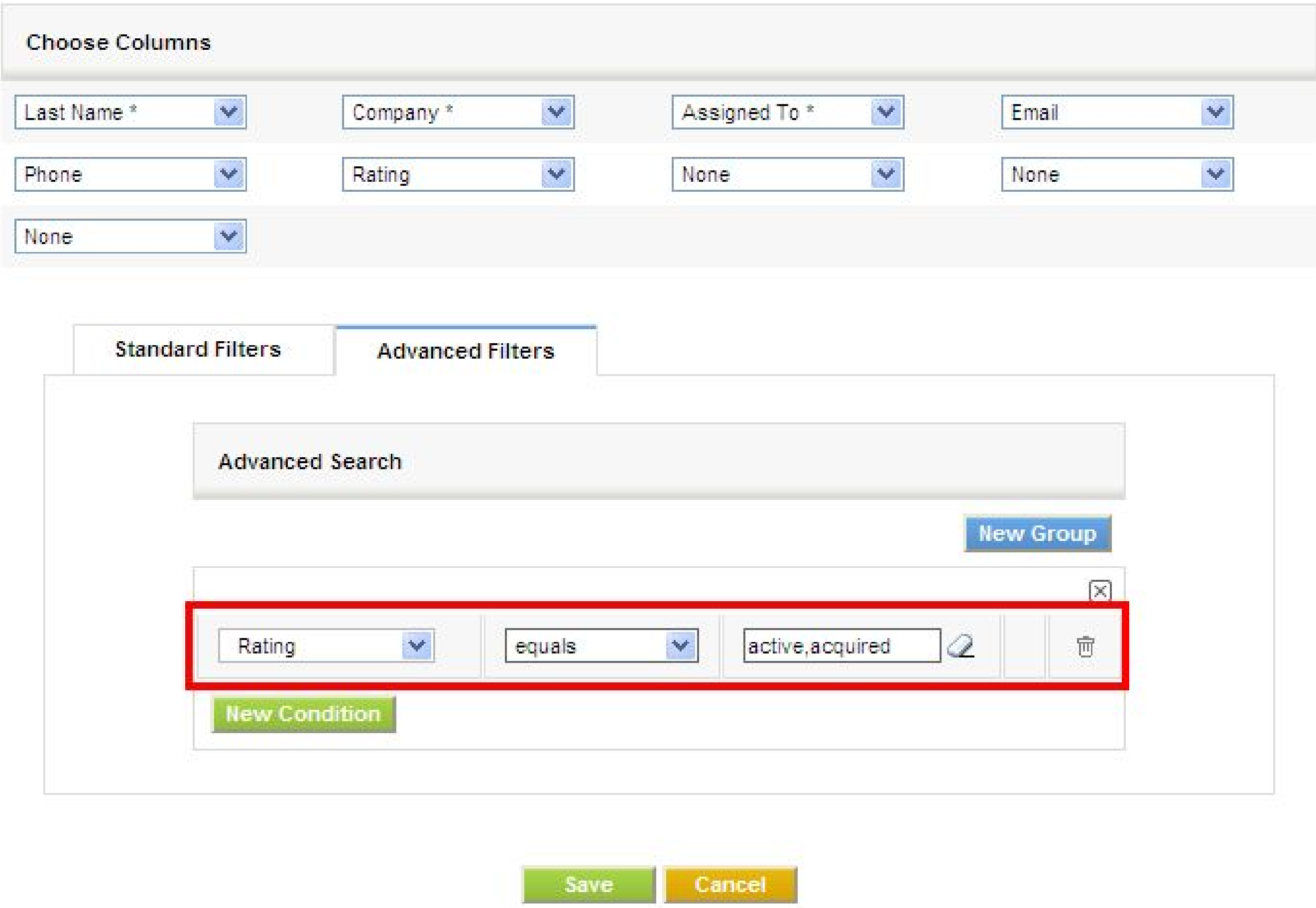
The options you will find in ***Standard Filters***	
Select a Column	**This picklist allows users to refine search depending upon record *Modified Time* or *Created Time*.**
Select Duration	**This picklist allows users to select time duration in accordance with *Select a Column* option above.**
Start Date* and *End Date	**You can fill these fields manually or if you will select the duration, these fields will be automatically filled.**



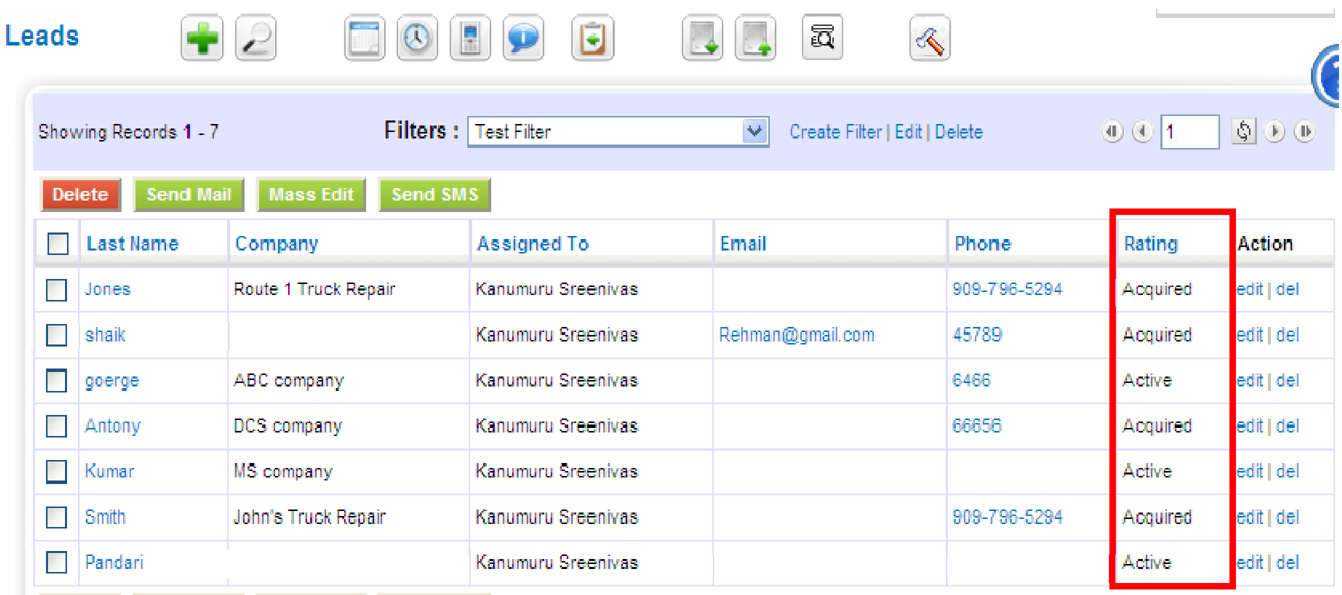
Advanced Filters refine the search depending upon lead information.

This block contains three columns. Select desired field name from picklist in first column, set desired relation from picklist in second column and enter one or multiple items in third column manually. Items you enter in third column should be separated with commas.

For example:

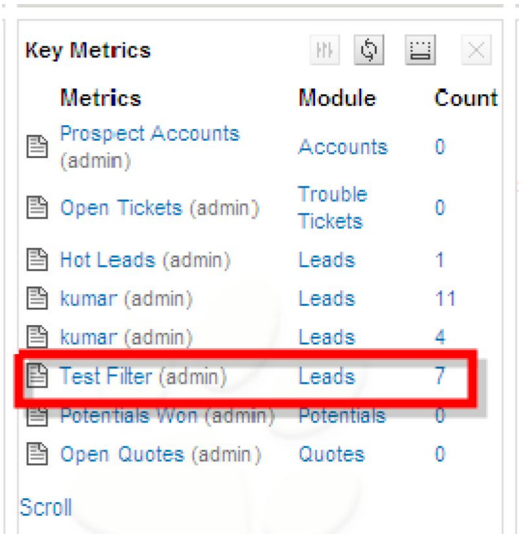


On ***Save***, listview of items filtered based upon search criteria in ***Advanced Filters***.



List in Metrics-

This option if enabled, the count and details of the filter will be shown in the ***Key Metrics*** widget on the Home Page.



Set as Default-

If this option is enabled, the view will be made default for the users.

Set as public-

If this option is enabled, every user of CRM, irrespective of role/position can view it. When a user marks a custom filter as public, it should be first approved by admin. It remains in pending state until admin approves it. Admin can see the request under the ***Pending*** section.