

## CRM BASICS

### DATA FIELD CAPTIONS / DROP-DOWN OPTIONS

For Additional Data that you wish to store against your customers, you can use Custom CRM Data and Additional Data. You can rename the captions for these fields, depending on the information you need to store.

- These captions are configured by [User Group](#).
- In Custom CRM Data there are **10** [drop-down](#) fields.
- In Additional Data there are **10** [free text](#) fields.
- Information can be added to these fields when you are [creating a new customer](#) or [editing a customer](#).
- View the details below to configure the captions for these additional fields:
  - [Set Custom CRM Data Field Captions](#)
    - [Set Custom CRM Data Drop-Down Options](#)
  - [Set Additional Data Field Captions](#)

These custom fields are all found in the **Save Customer** screen:

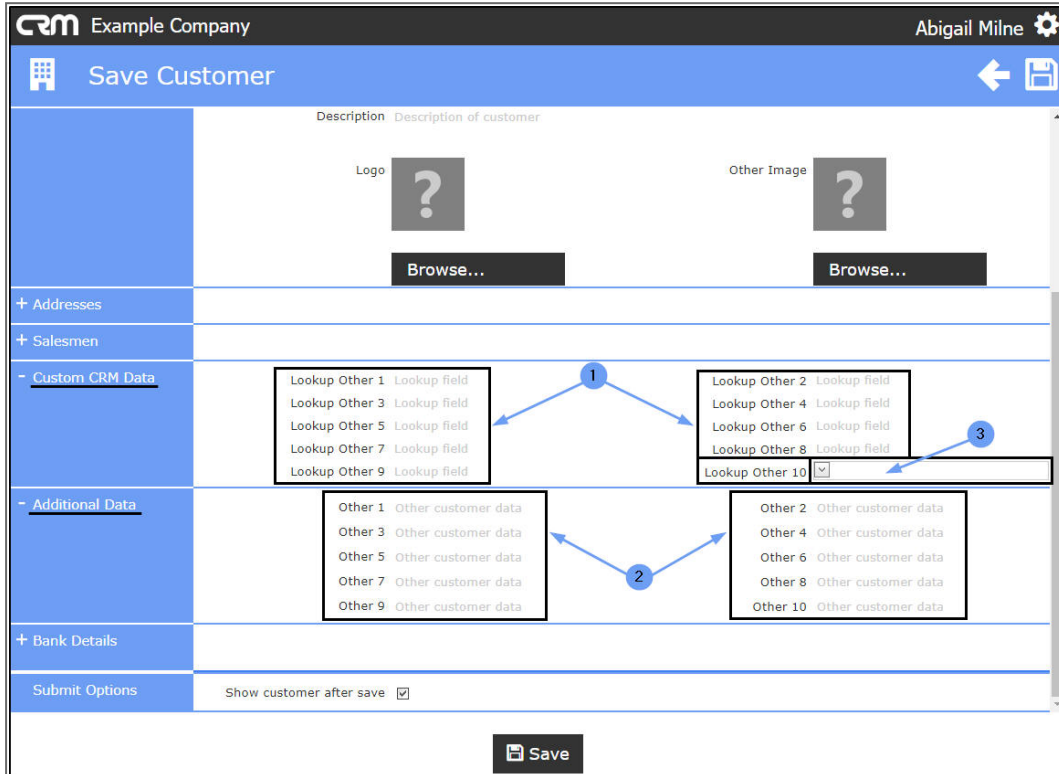
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**Ribbon Access:** CRM Dashboard > Add New Items > Customer tile > Save Customer screen > More Details frame > Custom CRM Data and Additional Data frames

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Here you can view:

1. Custom CRM Data ***captions*** and drop-down ***options***.
2. Additional Data ***captions*** and drop-down ***options***.
3. In this example, note that the ***Lookup Other 10*** field in Custom CRM Data is currently blank.

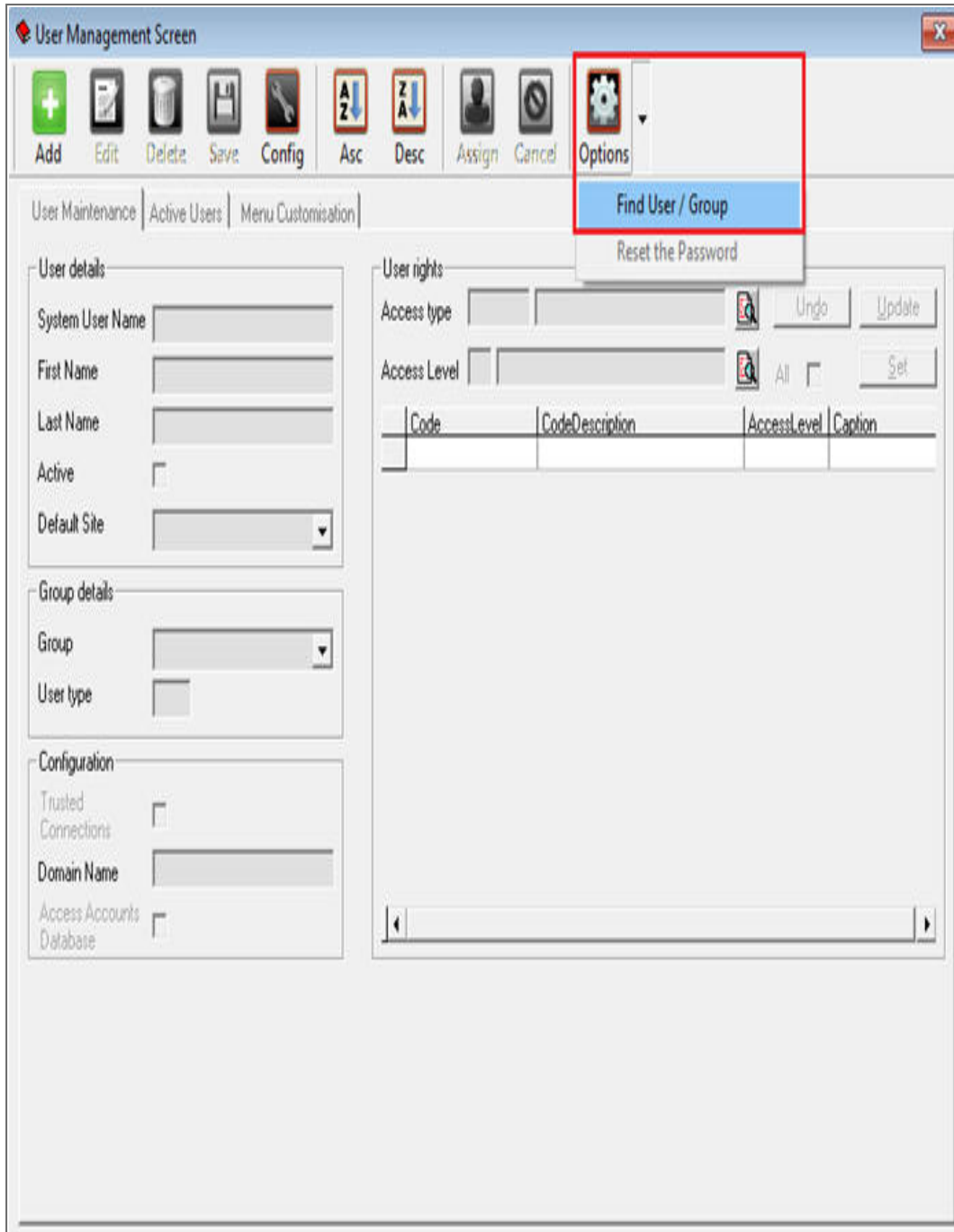


The screenshot shows the 'Save Customer' form in the CRM system. The form is titled 'Save Customer' and is for 'Example Company'. It shows various data entry fields including 'Description', 'Logo', 'Other Image', 'Addresses', 'Salesmen', 'Custom CRM Data', 'Additional Data', 'Bank Details', and 'Submit Options'. The 'Custom CRM Data' section contains two columns of 'Lookup' fields. The first column has 'Lookup Other 1' through 'Lookup Other 9'. The second column has 'Lookup Other 2' through 'Lookup Other 8' and 'Lookup Other 10'. The 'Lookup Other 10' field is currently blank. The 'Additional Data' section contains two columns of 'Other' fields. The first column has 'Other 1' through 'Other 9'. The second column has 'Other 2' through 'Other 10'. The 'Submit Options' section has a checkbox for 'Show customer after save' which is checked. A 'Save' button is at the bottom right.

## SET CUSTOM CRM DATA FIELD CAPTIONS

**Ribbon Access:** BPO: Administration > Security > User Group and Security

- Click on the Options menu and select 'Find User/Group'



The screenshot shows the 'User Management Screen' with a toolbar at the top. The 'Options' button, represented by a gear icon, is highlighted with a red rectangle. A dropdown menu is open from this button, showing two options: 'Find User / Group' (highlighted in blue) and 'Reset the Password'.

The main window is divided into three tabs: 'User Maintenance', 'Active Users', and 'Menu Customisation'. The 'User Maintenance' tab is active. It contains three sections: 'User details', 'Group details', and 'Configuration'.

**User details:**

- System User Name:
- First Name:
- Last Name:
- Active: ☐
- Default Site:

**Group details:**

- Group:
- User type:

**Configuration:**

- Trusted Connections: ☐
- Domain Name:
- Access Accounts Database: ☐

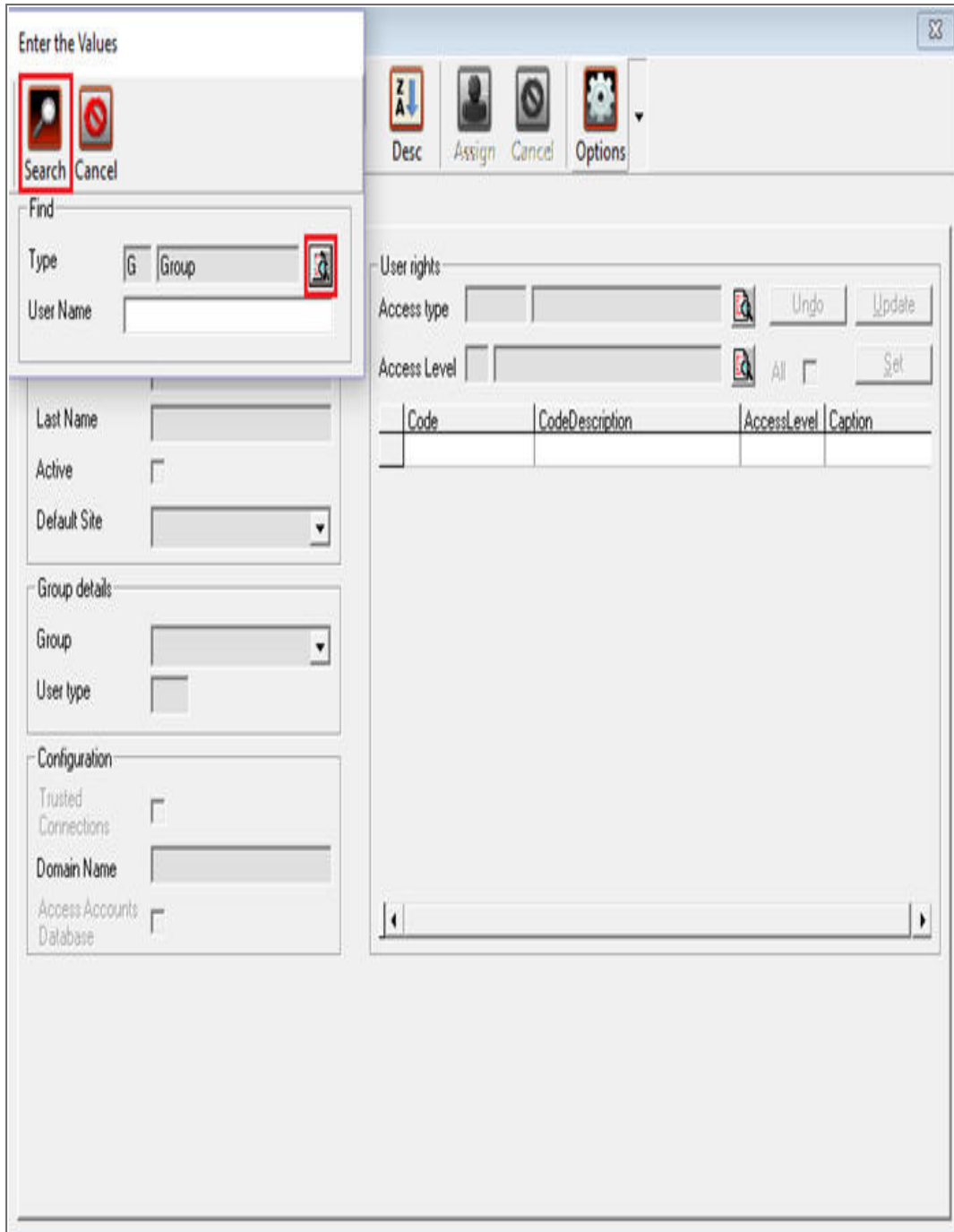
**User rights:**

- Access type:
- Access Level:

**Table:**

Code	CodeDescription	AccessLevel	Caption

- Click on the '**Type**' search box and select 'Group'
- Click on the form main 'Search' button





The screenshot shows the CO3 Technologies software interface. On the left, a 'Find' dialog box is open, titled 'Enter the Values'. It contains a 'Search' button (highlighted with a red box) and a 'Cancel' button. Below the buttons, there are input fields for 'Type' (set to 'G') and 'Group' (with a search icon button highlighted by a red box). The main application window on the right has a toolbar with buttons for 'Desc', 'Assign', 'Cancel', and 'Options'. Below the toolbar, there are sections for 'User rights', 'Access type', and 'Access Level'. At the bottom, there is a table with columns: 'Code', 'CodeDescription', 'AccessLevel', and 'Caption'.

Code	CodeDescription	AccessLevel	Caption


- Scroll down in the list of User Groups to find the Group you need to edit
- Double click on the UserGroup line

Enter the Values





Search Cancel

Find:

Type  Group 


User Name


UserName	Description
PRAD	Procurement Administra...
PRMA	Procurement Managem...
SLAD	Sales Administration
SLMA	Sales Management
CCAD	Call Centre Administrati...
CCMA	Call Centre Management
CTAD	Contracts Administration
CTMA	Contracts Management
ACAD	Accounts Administration
ACMA	Accounts Management
SVAD	Service Administration
SVMA	Service Management
<b>CRAD</b>	<b>CRM Administration</b>
CRMA	CRM Management

Desc Assign Cancel Options

User rights:

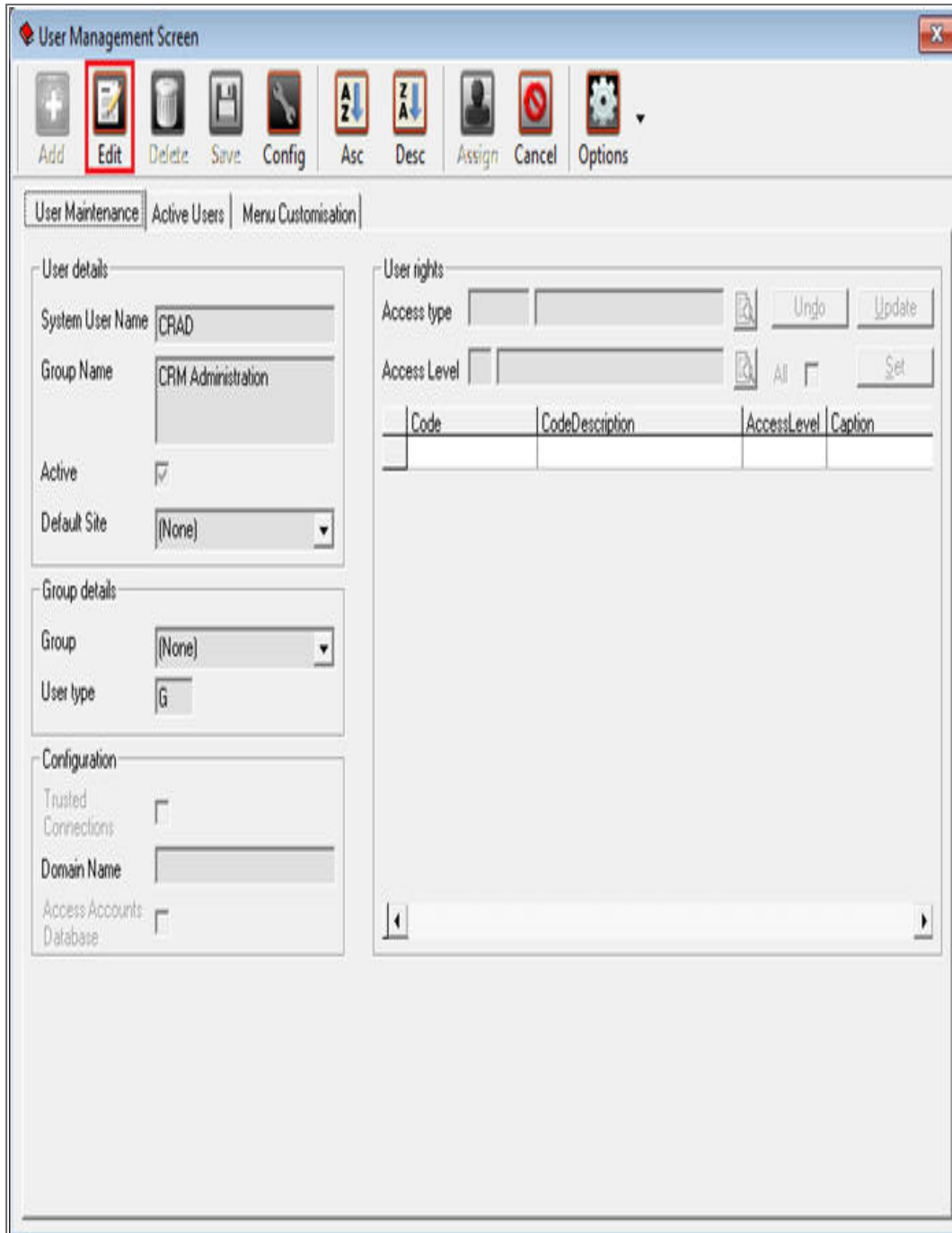
Access type   Undo Update

Access Level   All ☐ Set

Code	CodeDescription	AccessLevel	Caption

Access MODULITY Database ☐

- Click on the 'Edit' button.



**User Management Screen**

Add Edit Delete Save Config Asc Desc Assign Cancel Options

User Maintenance | Active Users | Menu Customisation

**User details**

System User Name: CRAD

Group Name: CRM Administration

Active: ☒

Default Site: (None)

**Group details**

Group: (None)

User type: G

**Configuration**

Trusted Connections: ☐

Domain Name:

Access Accounts Database: ☐

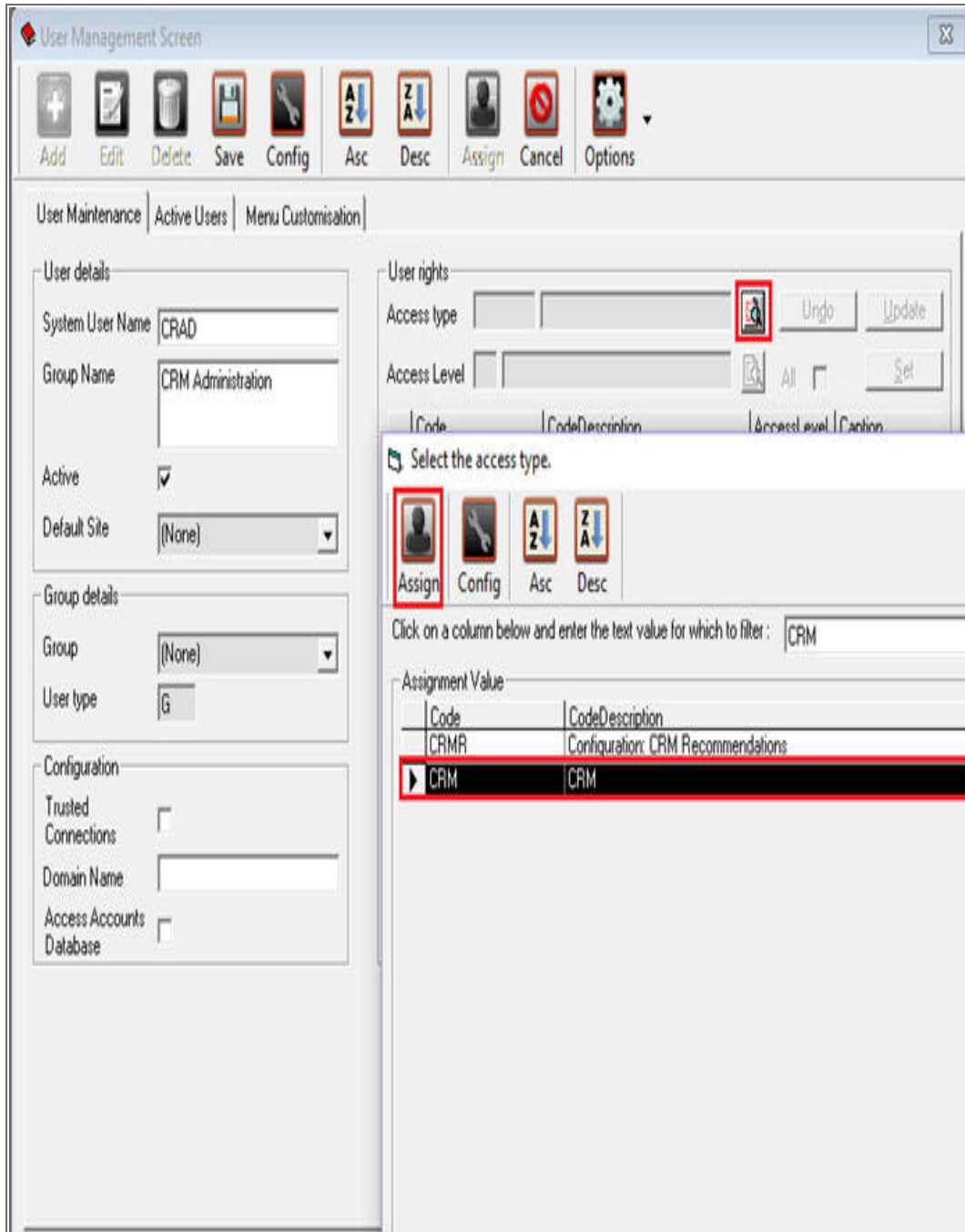
**User rights**

Access type:  Undo Update

Access Level:  All ☐ Set

Code	CodeDescription	AccessLevel	Caption

- **Access Type:** Click on the 'Search' button.
- Search for 'CRM' in the Code Description.
- Select the row and click on the 'Assign' button.

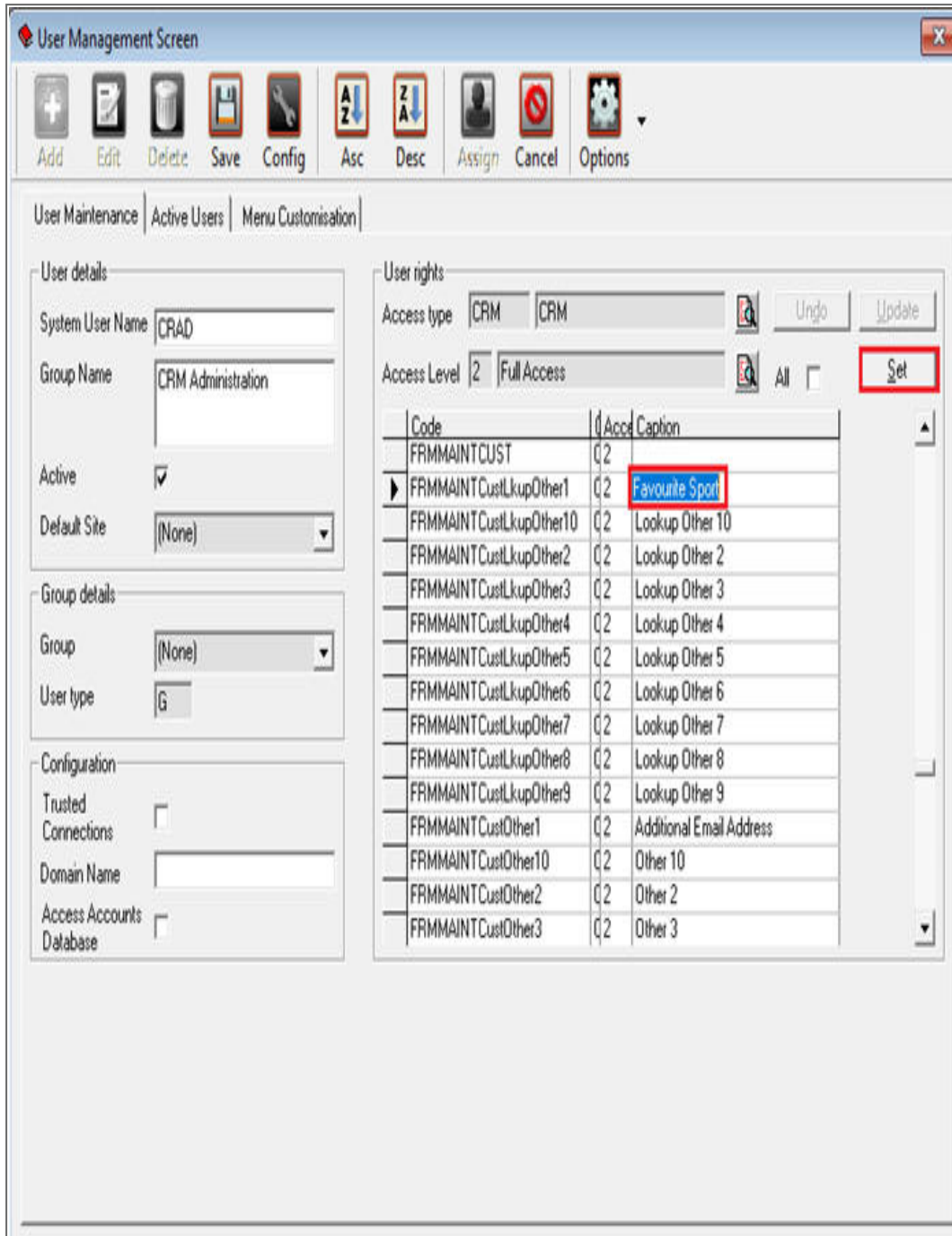


The screenshot shows the 'User Management Screen' with the 'Active Users' tab selected. The 'User details' section shows 'System User Name' as 'CRAD' and 'Group Name' as 'CRM Administration'. The 'User rights' section shows 'Access type' as 'Assign' (highlighted with a red box) and 'Access Level' as 'All'. A modal window titled 'Select the access type.' is open, showing the 'Assign' button (highlighted with a red box) and a table of assignment values.

Code	CodeDescription
CRMR	Configuration: CRM Recommendations
CRM	CRM

- **Code:** FRMMAINTCustLkupOther1 thru FRMMAINTCustLkupOther10
- Type the new caption in the 'Caption' column.

- Click on the 'Set' button. **Note:** If the Set button is not available, then reselect that line's access level.



**User Management Screen**

Add Edit Delete Save Config Asc Desc Assign Cancel Options

User Maintenance | Active Users | Menu Customisation

**User details**  
 System User Name: CRAD  
 Group Name: CRM Administration  
 Active: ☒  
 Default Site: (None)

**Group details**  
 Group: (None)  
 User type: G

**Configuration**  
 Trusted Connections: ☐  
 Domain Name:   
 Access Accounts Database: ☐

**User rights**  
 Access type: CRM CRM Undo Update  
 Access Level: 2 Full Access All **Set**

Code	Access	Access Caption
FRMMAINTCUST	02	
FRMMAINTCustLkupOther1	02	Favourite Sport
FRMMAINTCustLkupOther10	02	Lookup Other 10
FRMMAINTCustLkupOther2	02	Lookup Other 2
FRMMAINTCustLkupOther3	02	Lookup Other 3
FRMMAINTCustLkupOther4	02	Lookup Other 4
FRMMAINTCustLkupOther5	02	Lookup Other 5
FRMMAINTCustLkupOther6	02	Lookup Other 6
FRMMAINTCustLkupOther7	02	Lookup Other 7
FRMMAINTCustLkupOther8	02	Lookup Other 8
FRMMAINTCustLkupOther9	02	Lookup Other 9
FRMMAINTCustOther1	02	Additional Email Address
FRMMAINTCustOther10	02	Other 10
FRMMAINTCustOther2	02	Other 2
FRMMAINTCustOther3	02	Other 3



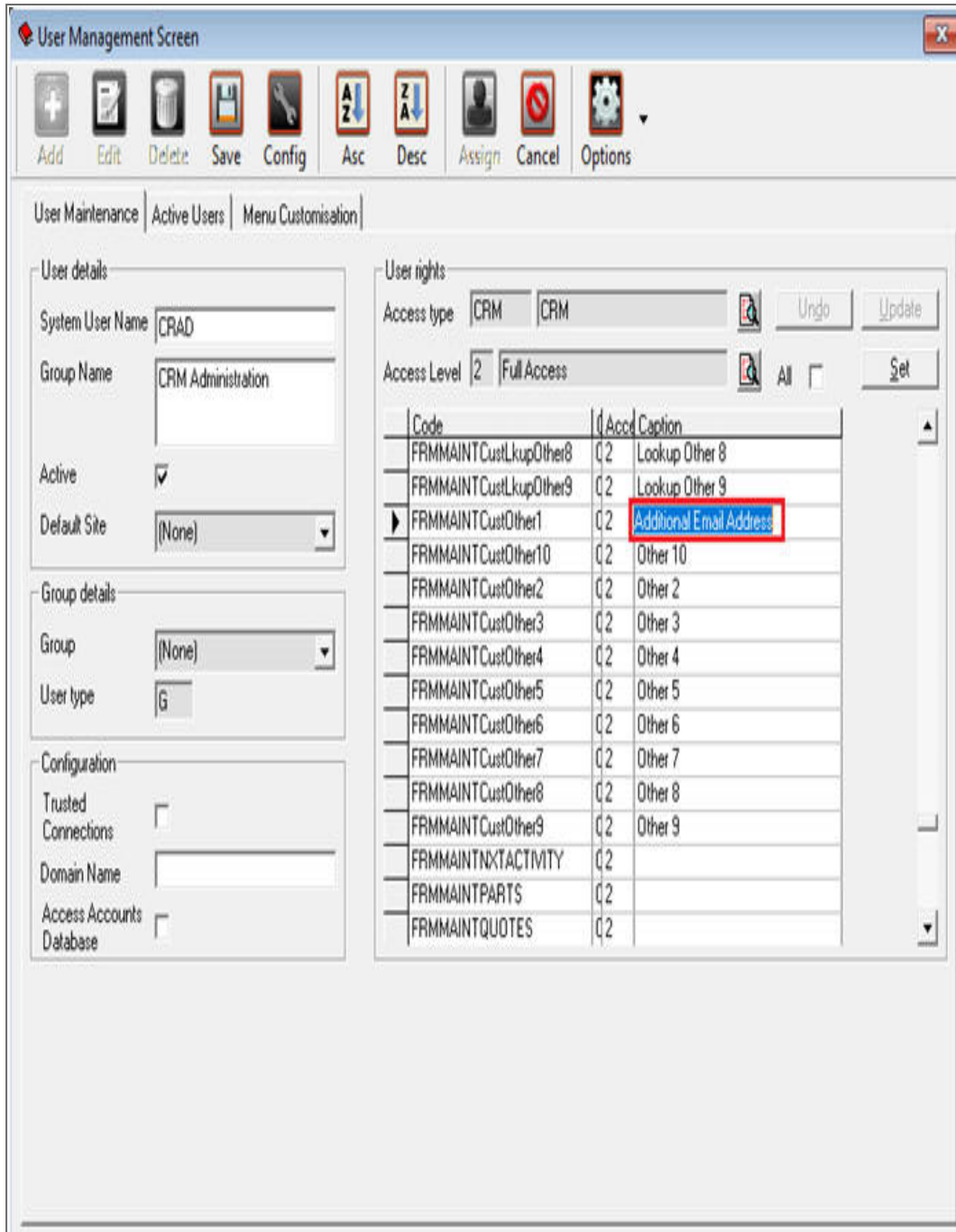
## SET ADDITIONAL DATA FIELD CAPTIONS

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**Ribbon Access:** *BPO: Administration > Security > User Group and Security*

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- Follow the same process as for [Set Custom CRM Data Field Captions](#)
- But for the last step, set the following codes instead:
- **Code:** FRMMAINTCustOther1 thru FRMMAINTCustOther10
- Type the new caption in the 'Caption' column.
- Click on the 'Set' button. **Note:** If the Set button is not available, then reselect that line's access level.



**User Management Screen**

[Add](#)
[Edit](#)
[Delete](#)
[Save](#)
[Config](#)
[Asc](#)
[Desc](#)
[Assign](#)
[Cancel](#)
[Options](#)

[User Maintenance](#)
[Active Users](#)
[Menu Customisation](#)

**User details**

System User Name:

Group Name:

Active: ☒

Default Site:

**Group details**

Group:

User type:

**Configuration**

Trusted Connections: ☐

Domain Name:

Access Accounts Database: ☐

**User rights**

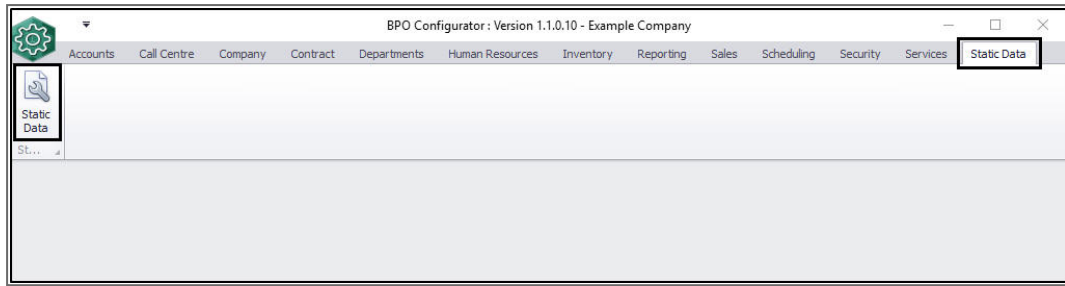
Access type:   [Undo](#) [Update](#)

Access Level:   [Undo](#) ☐ All [Set](#)

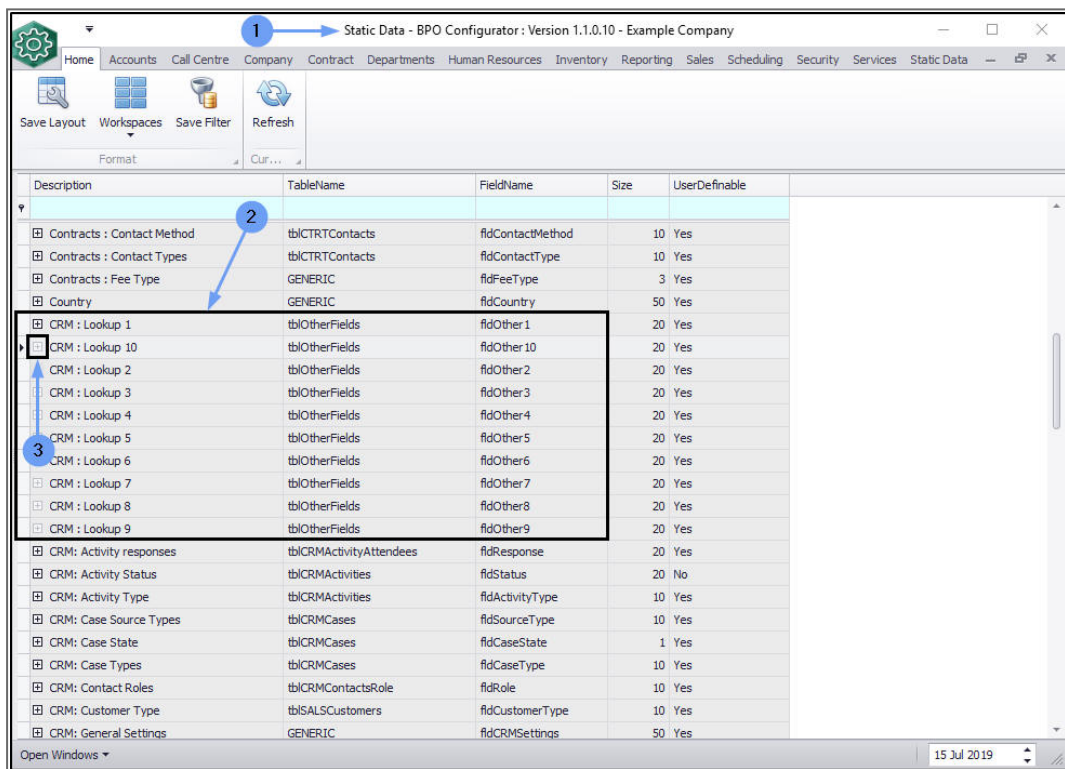
Code	Accd	Caption
FRMMAINTCustLkupOther8	02	Lookup Other 8
FRMMAINTCustLkupOther9	02	Lookup Other 9
FRMMAINTCustOther1	02	Additional Email Address
FRMMAINTCustOther10	02	Other 10
FRMMAINTCustOther2	02	Other 2
FRMMAINTCustOther3	02	Other 3
FRMMAINTCustOther4	02	Other 4
FRMMAINTCustOther5	02	Other 5
FRMMAINTCustOther6	02	Other 6
FRMMAINTCustOther7	02	Other 7
FRMMAINTCustOther8	02	Other 8
FRMMAINTCustOther9	02	Other 9
FRMMAINTNXACTIVITY	02	
FRMMAINTPARTS	02	
FRMMAINTQUOTES	02	

## SET CUSTOM CRM DATA DROP-DOWN FIELD ITEMS

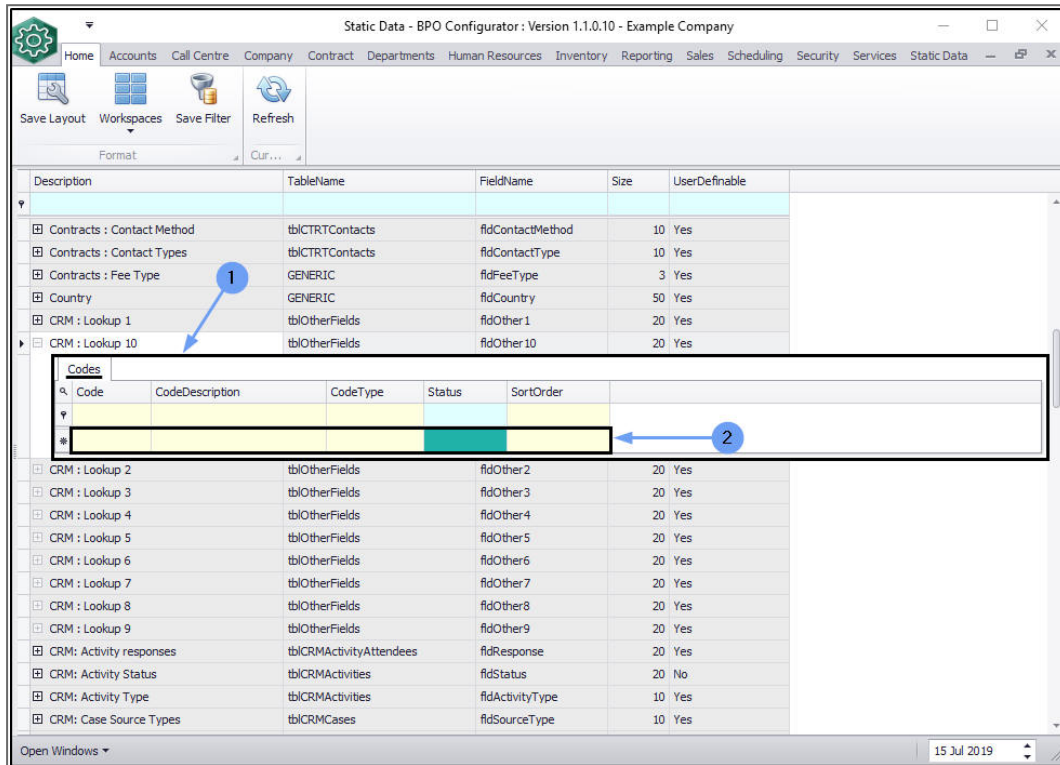
**Ribbon Access:** Configurator > Static Data > Static Data



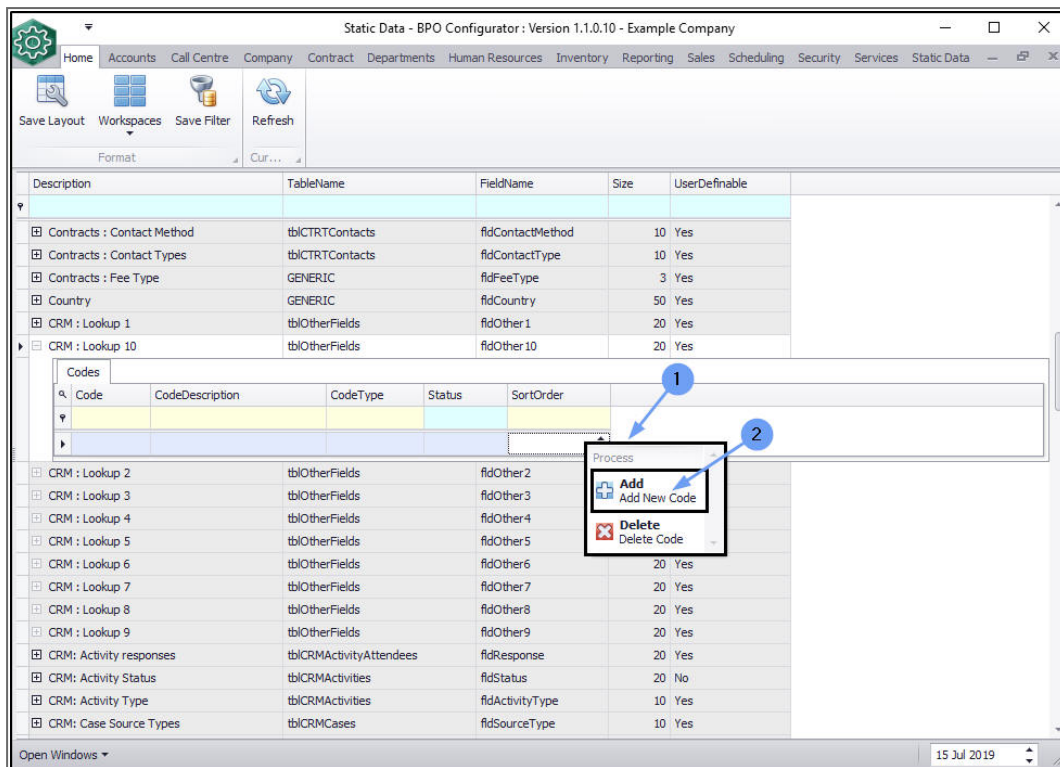
1. The **Static Data** screen will be displayed.
2. Scroll down the list or use the **filter row** to find the CRM: Lookup fields.
3. Click on the **expand** button in front of the particular field that you wish to add field **items** to.
  - As noted above, the **Lookup Other 10** field in Custom CRM Data is currently blank, therefore, the corresponding CRM: Lookup 10 row is selected.



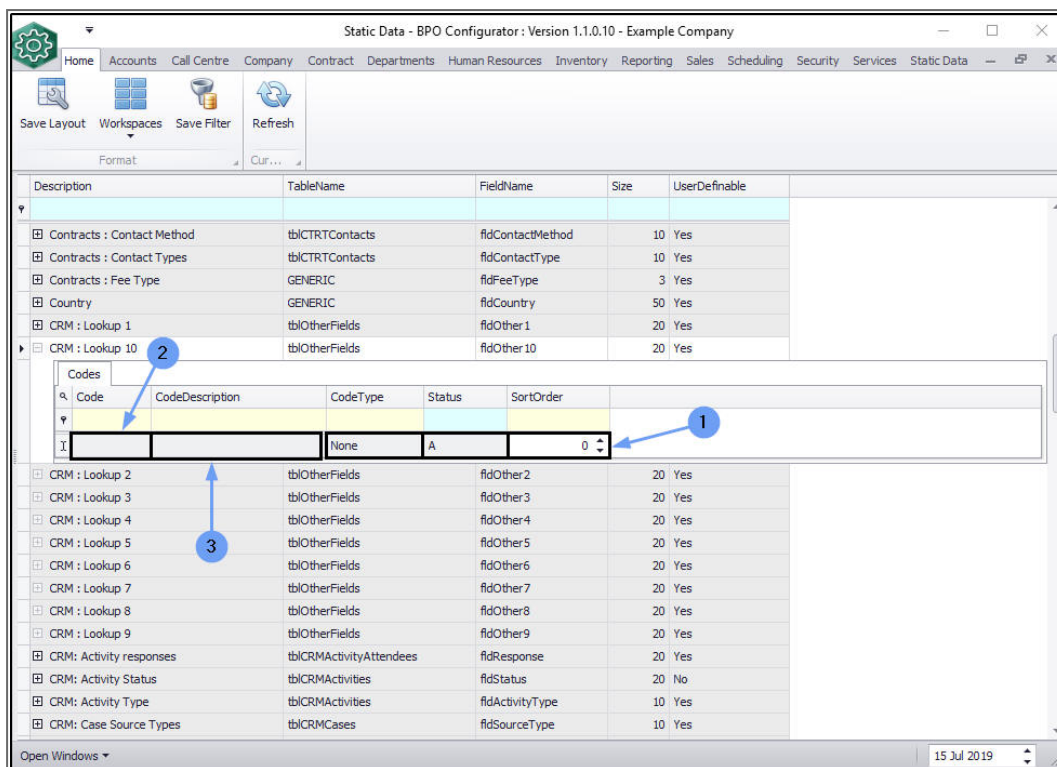
1. The **Codes** frame will be expanded.
  - This data grid does not currently contain any information as nothing has been set up yet.
2. **Right click** anywhere in the blank row (not the filter row) of this **Codes** data grid.



- A **Process** menu will pop up.
- Click on **Add** - Add New Code.



1. The blank row in the **Codes** data grid will now be **activated** - the **Code Type**, **Status** and **Sort Order** columns will now be populated.
2. **Code:** Click in this text box and type in a code specific for this CRM Lookup field.
3. **Code Description:** Click in this text box and type in a description for this CRM Lookup field code.



Static Data - BPO Configurator : Version 1.1.0.10 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Cur...

Description	TableName	FieldName	Size	UserDefinable
Contracts : Contact Method	tblCTRContacts	fldContactMethod	10	Yes
Contracts : Contact Types	tblCTRContacts	fldContactType	10	Yes
Contracts : Fee Type	GENERIC	fldFeeType	3	Yes
Country	GENERIC	fldCountry	50	Yes
CRM : Lookup 1	tblOtherFields	fldOther1	20	Yes
CRM : Lookup 10	tblOtherFields	fldOther10	20	Yes

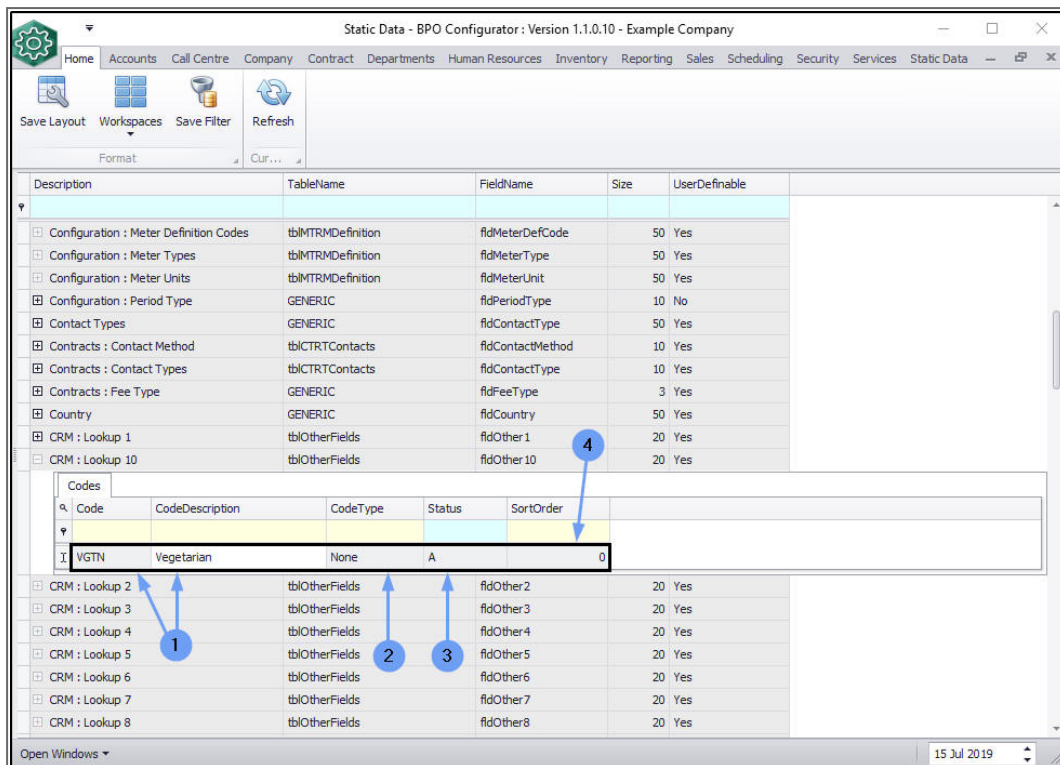
Codes

Code	CodeDescription	CodeType	Status	SortOrder
		None	A	0

CRM : Lookup 2	tblOtherFields	fldOther2	20	Yes
CRM : Lookup 3	tblOtherFields	fldOther3	20	Yes
CRM : Lookup 4	tblOtherFields	fldOther4	20	Yes
CRM : Lookup 5	tblOtherFields	fldOther5	20	Yes
CRM : Lookup 6	tblOtherFields	fldOther6	20	Yes
CRM : Lookup 7	tblOtherFields	fldOther7	20	Yes
CRM : Lookup 8	tblOtherFields	fldOther8	20	Yes
CRM : Lookup 9	tblOtherFields	fldOther9	20	Yes
CRM: Activity responses	tblCRMActivityAttendees	fldResponse	20	Yes
CRM: Activity Status	tblCRMActivities	fldStatus	20	No
CRM: Activity Type	tblCRMActivities	fldActivityType	10	Yes
CRM: Case Source Types	tblCRMCases	fldSourceType	10	Yes

Open Windows 15 Jul 2019

1. Once you have entered the **Code** and **Code Description**, move across to the remaining columns.
2. **Code Type:** This can remain as **None**.
3. **Status:** This will auto populate with **A** - Active.
4. **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new CRM Lookup field.
  - **Note:** The **sort order** is the order in which this will appear in the call error code drop-down list in BPO2. If each call error code has the same number e.g. **0** or **1**, then the drop-down list will usually default to an alphabetical order in BPO2. However, if, for example, it is numbered **5** in an ordered list of 1-10, then it will appear **5th** in the drop-down list in BPO2.



The screenshot shows the 'Static Data - BPO Configurator' application. The main table lists various data fields with columns: Description, TableName, FieldName, Size, and UserDefinable. A pop-up window titled 'Codes' is open, showing a table with columns: Code, CodeDescription, CodeType, Status, and SortOrder. The table contains one row with the code 'VGTN', description 'Vegetarian', code type 'None', status 'A', and sort order '0'. Blue arrows numbered 1 through 4 point to specific elements: 1 points to the 'CRM : Lookup 2' row in the main table; 2 points to the 'CodeType' column header in the pop-up; 3 points to the 'Status' column header in the pop-up; and 4 points to the 'SortOrder' column header in the pop-up.

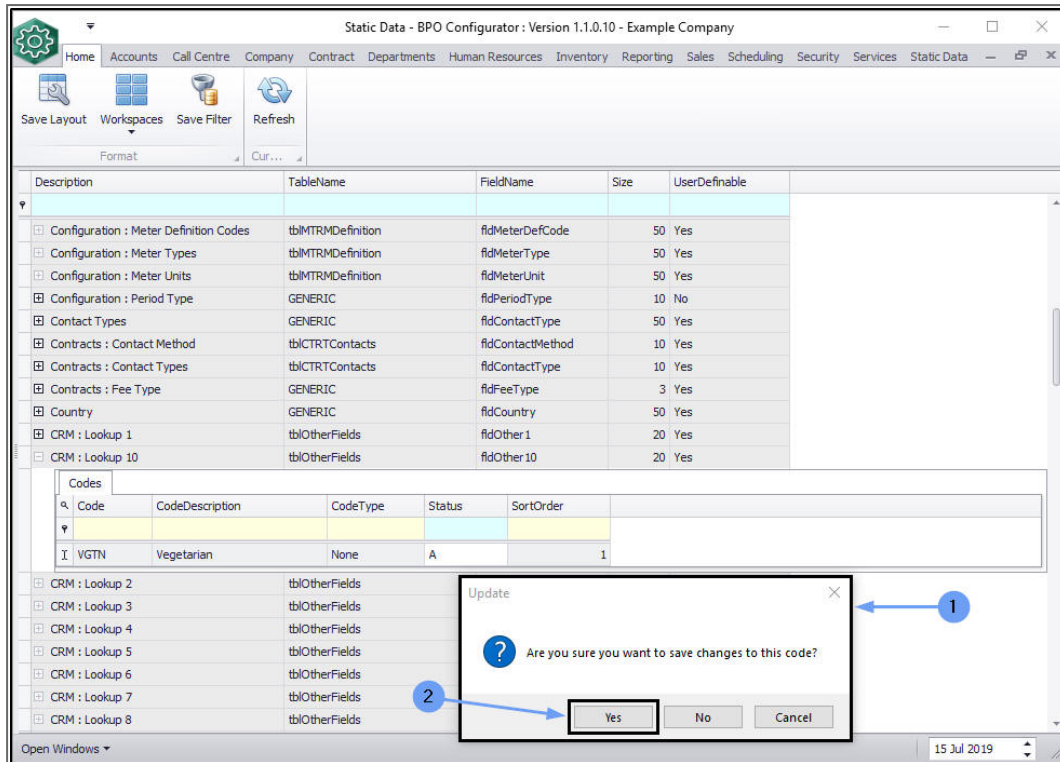
Description	TableName	FieldName	Size	UserDefinable
Configuration : Meter Definition Codes	tblMTRMDefinition	fldMeterDefCode	50	Yes
Configuration : Meter Types	tblMTRMDefinition	fldMeterType	50	Yes
Configuration : Meter Units	tblMTRMDefinition	fldMeterUnit	50	Yes
Configuration : Period Type	GENERIC	fldPeriodType	10	No
Contact Types	GENERIC	fldContactType	50	Yes
Contracts : Contact Method	tblCTRTRContacts	fldContactMethod	10	Yes
Contracts : Contact Types	tblCTRTRContacts	fldContactType	10	Yes
Contracts : Fee Type	GENERIC	fldFeeType	3	Yes
Country	GENERIC	fldCountry	50	Yes
CRM : Lookup 1	tblOtherFields	fldOther1	20	Yes
CRM : Lookup 10	tblOtherFields	fldOther10	20	Yes
CRM : Lookup 2	tblOtherFields	fldOther2	20	Yes
CRM : Lookup 3	tblOtherFields	fldOther3	20	Yes
CRM : Lookup 4	tblOtherFields	fldOther4	20	Yes
CRM : Lookup 5	tblOtherFields	fldOther5	20	Yes
CRM : Lookup 6	tblOtherFields	fldOther6	20	Yes
CRM : Lookup 7	tblOtherFields	fldOther7	20	Yes
CRM : Lookup 8	tblOtherFields	fldOther8	20	Yes

Code	CodeDescription	CodeType	Status	SortOrder
VGTN	Vegetarian	None	A	0

- When you have finished adding the new call error code details, either click outside of the Codes data grid or press **Enter** on your keyboard.

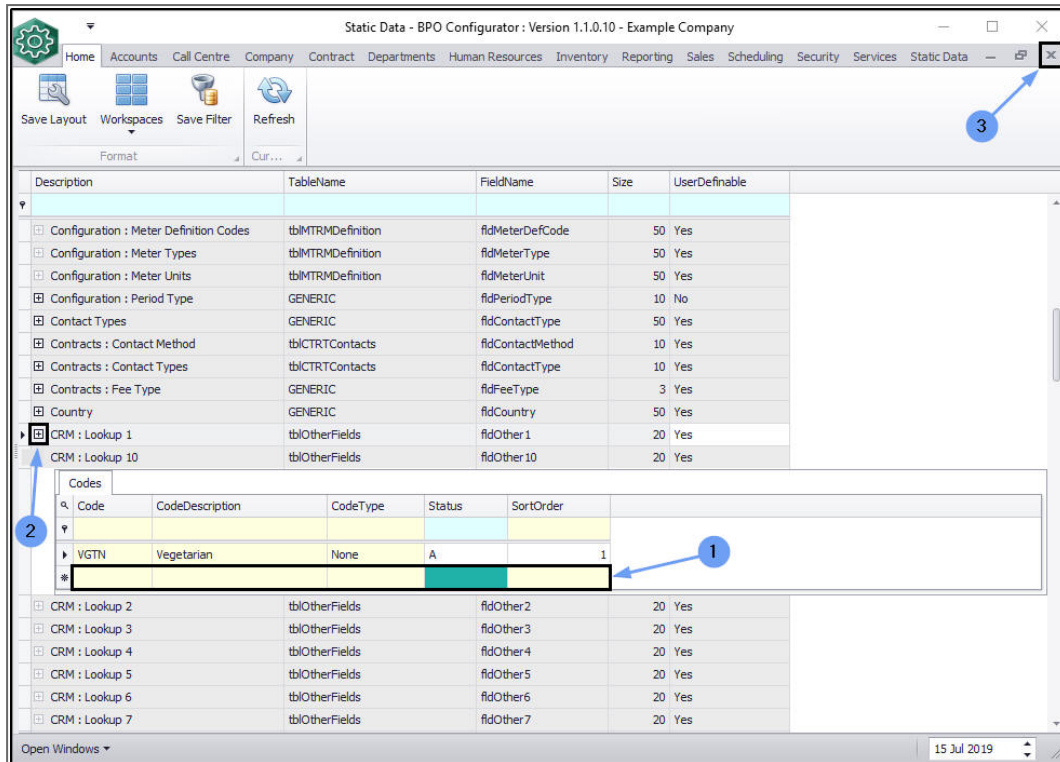
- An **Update** message box will pop up, asking;
  - Are you sure you want to save changes to this code?**
- Click on **Yes**.





1. The new CRM Lookup field code will be **saved** and a **new row** will be added to the **Codes** data grid.
2. **Collapse** the Codes frame and
3. **Exit** this screen when you are done.



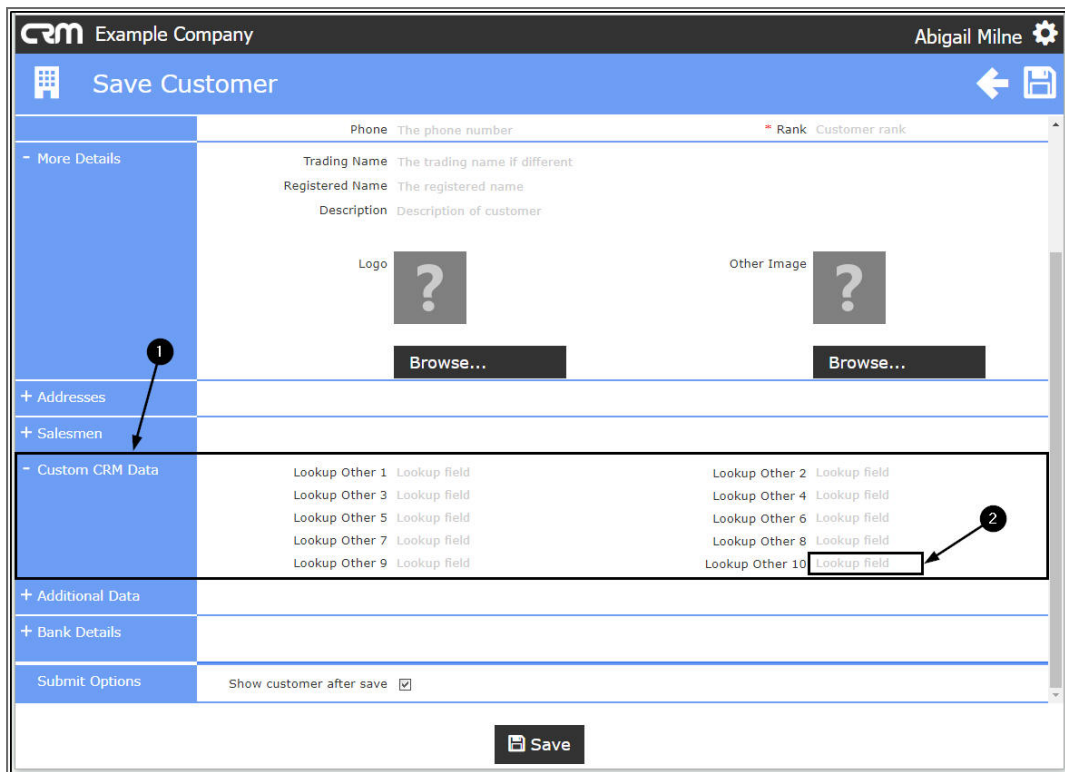


## VIEW THE NEW CUSTOM DATA FIELD IN CRM

**Ribbon Access:** Dashboard > Add New Items > Customer tile > Save Customer screen > More Details frame > Custom CRM Data frame

To view the new Custom Data field, navigate to the Save Customer screen in CRM.

1. In the **Custom CRM Data** frame,
2. Click in the **Lookup Other 10** field.



CRM Example Company Abigail Milne

## Save Customer

Phone The phone number Rank Customer rank

Trading Name The trading name if different

Registered Name The registered name

Description Description of customer

Logo ? Other Image ?

Browse... Browse...

+ Addresses

+ Salesmen

- Custom CRM Data

Lookup Other 1	Lookup field	Lookup Other 2	Lookup field
Lookup Other 3	Lookup field	Lookup Other 4	Lookup field
Lookup Other 5	Lookup field	Lookup Other 6	Lookup field
Lookup Other 7	Lookup field	Lookup Other 8	Lookup field
Lookup Other 9	Lookup field	Lookup Other 10	Lookup field

+ Additional Data

+ Bank Details

Submit Options

Show customer after save ☒

Save

1. The code ***description*** that was created and saved in the above process (Vegetarian) is now available for selection in this field.

CRM Example Company

Abigail Milne

Save Customer

website

The web site address

Phone

The phone number

Rank

Customer rank

More Details

Trading Name

The trading name if different

Registered Name

The registered name

Description

Description of customer

Logo

?

Browse...

Other Image

?

Browse...

+ Addresses

+ Salesmen

Custom CRM Data

Lookup Other 1

Lookup field

Lookup Other 2

Lookup field

Lookup Other 3

Lookup field

Lookup Other 4

Lookup field

Lookup Other 5

Lookup field

Lookup Other 6

Lookup field

Lookup Other 7

Lookup field

Lookup Other 8

Lookup field

Lookup Other 9

Lookup field

Lookup Other 10

Vegetarian

+ Additional Data

+ Bank Details

Submit Options

Show customer after save

☒

Save

CRM.000.021

