

CRM BASICS

CONFIGURATION AND SECURITY RIGHTS

CONFIGURATION NOTES

- Sales Team Employees should be linked to the correct manager within the company's employee organizational chart.
- The Salesman must be correctly linked as either the 'Main Salesman' or additional salesman on the customer.
- Customers (along with their cases and activities) can be re-assigned to another salesman.
- Each Customer must have at least one contact set to receive sales calls, else Recommendations cannot be used.
- The following static data must be configured:
 - Case State, e.g. 'Interested', 'Proposal', etc.
 - Each case must be linked to a case state.
 - Customer Type, e.g. 'Retail', 'Construction', etc.
 - Each customer must be linked to a customer type.
 - Contact Roles, e.g. 'Buying Officer', 'Technical Manager', etc.
 - Each customer contact must be linked to a contact type.
 - Customer Ranks (Call Cycle), e.g. Gold - 30 days, Bronze -120 days.
 - Each customer must be linked to a rank.
 - Reporting Area
 - Each customer must be linked to a reporting area for use with BPOCRM. Customer

reporting areas can be set up for use in BPO.

- [Salesman Target Types](#) for the 3 Month Performance chart: Cases (CASE), Quotes (QUOT), Orders (SORD), Invoices (SINV).
 - Each employee must be linked to these targets with their individual target value.
- [Salesman Target Types](#) for Activities for Last 30 Days chart, e.g. Meeting, Email, PhoneCall, SiteInspection.
 - Each employee must be linked to these targets with their individual target value.
- [Activity Type](#)
 - Activity types must be in line with the Salesman Target Types for Activities, and each activity should be linked to one activity type.

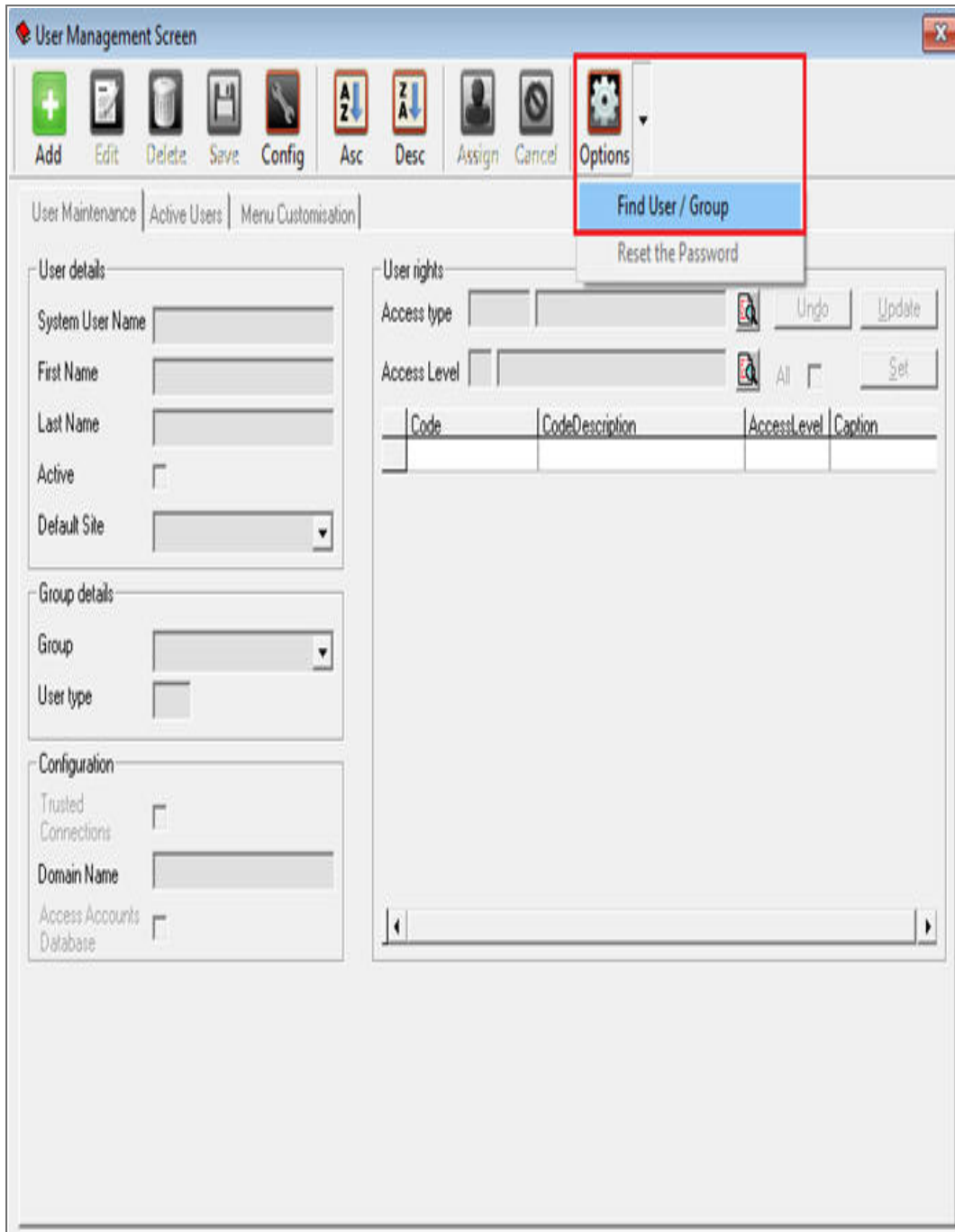
Also refer to: [General Settings](#)

SECURITY AND USER RIGHTS

- Security rights for CRM are configured in BPO.
- Security can be set to either have **Full Access** or **No Access** to each of the forms in CRM, e.g. Customers, Contacts, Activities, Cases, 3rd Party, Pipeline and re-print Reports (Quotes, Orders, Invoices, Credit Notes and Contract Performance).
- As with all security rights changes, users must log out of CRM and back into CRM for the changes to take effect (if the user was logged in when the changes were made).

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

- The Static Data screen will be displayed.
- 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 box. A dropdown menu is open from the 'Options' button, showing two options: 'Find User / Group' (highlighted in blue) and 'Reset the Password'.

The main area of the screen is divided into 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:
- Buttons: Undo, Update, Set

Table:

Code	CodeDescription	AccessLevel	Caption

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



Enter the Values
 
Search Cancel

Find
Type Group 
User Name

Last Name
Active ☐
Default Site

Group details
Group
User type



Configuration
Trusted Connections ☐
Domain Name
Access Accounts Database ☐

Desc Assign Cancel Options
User rights
Access type  Undo Update
Access Level  All ☐ Set

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
CRAD	CRM Administration
CRMA	CRM Management


Access Module: ☐ Database

Desc Assign Cancel Options

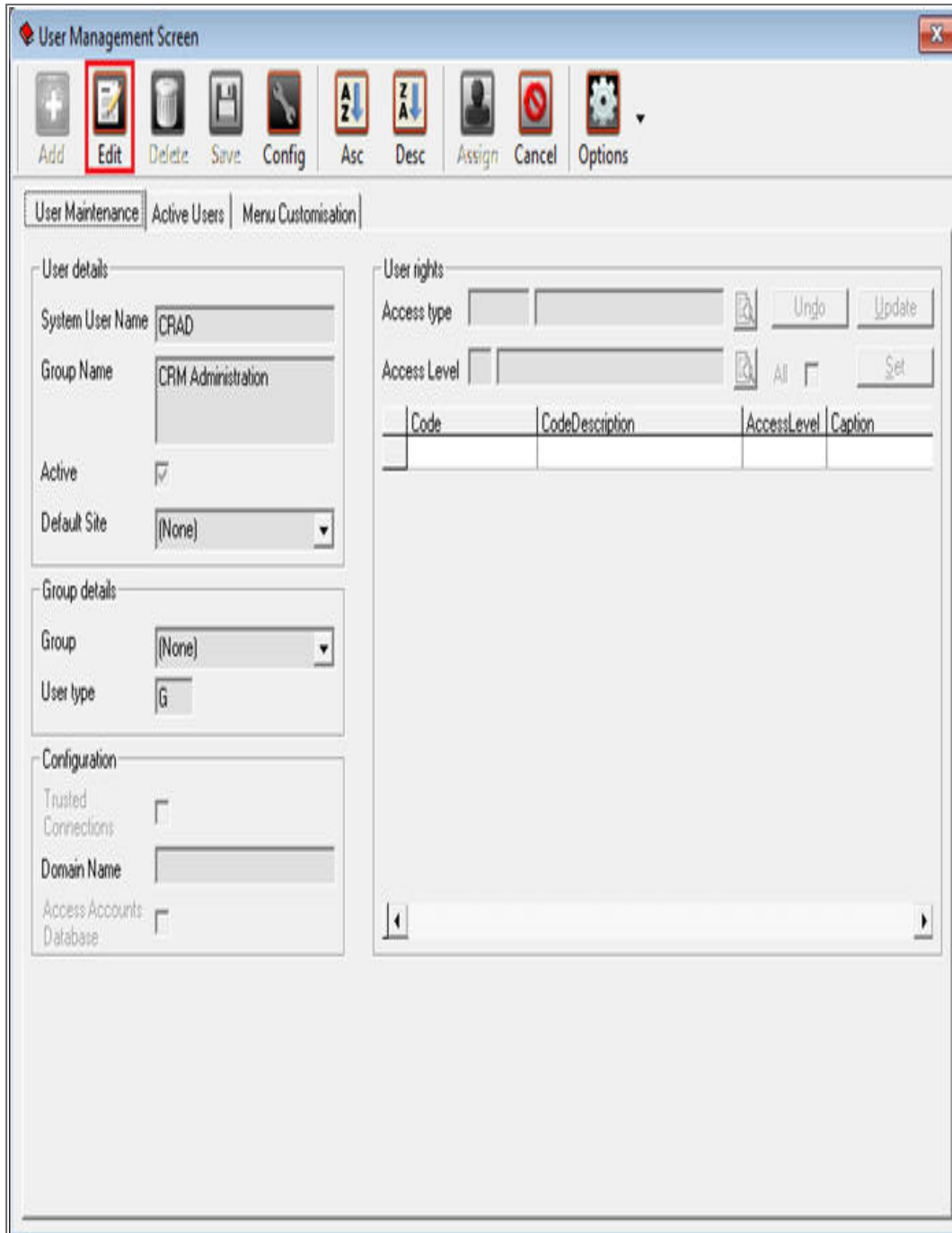
User rights:

Access type  Undo Update

Access Level  All ☐ Set

Code	CodeDescription	AccessLevel	Caption

- Click on the 'Edit' button.



The screenshot shows the 'User Management Screen' with the 'Edit' button highlighted in the toolbar. The 'User Maintenance' tab is active, showing 'User details', 'Group details', and 'Configuration' sections. The 'User rights' section includes 'Access type', 'Access Level', and a table for assigning rights.

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: ☐

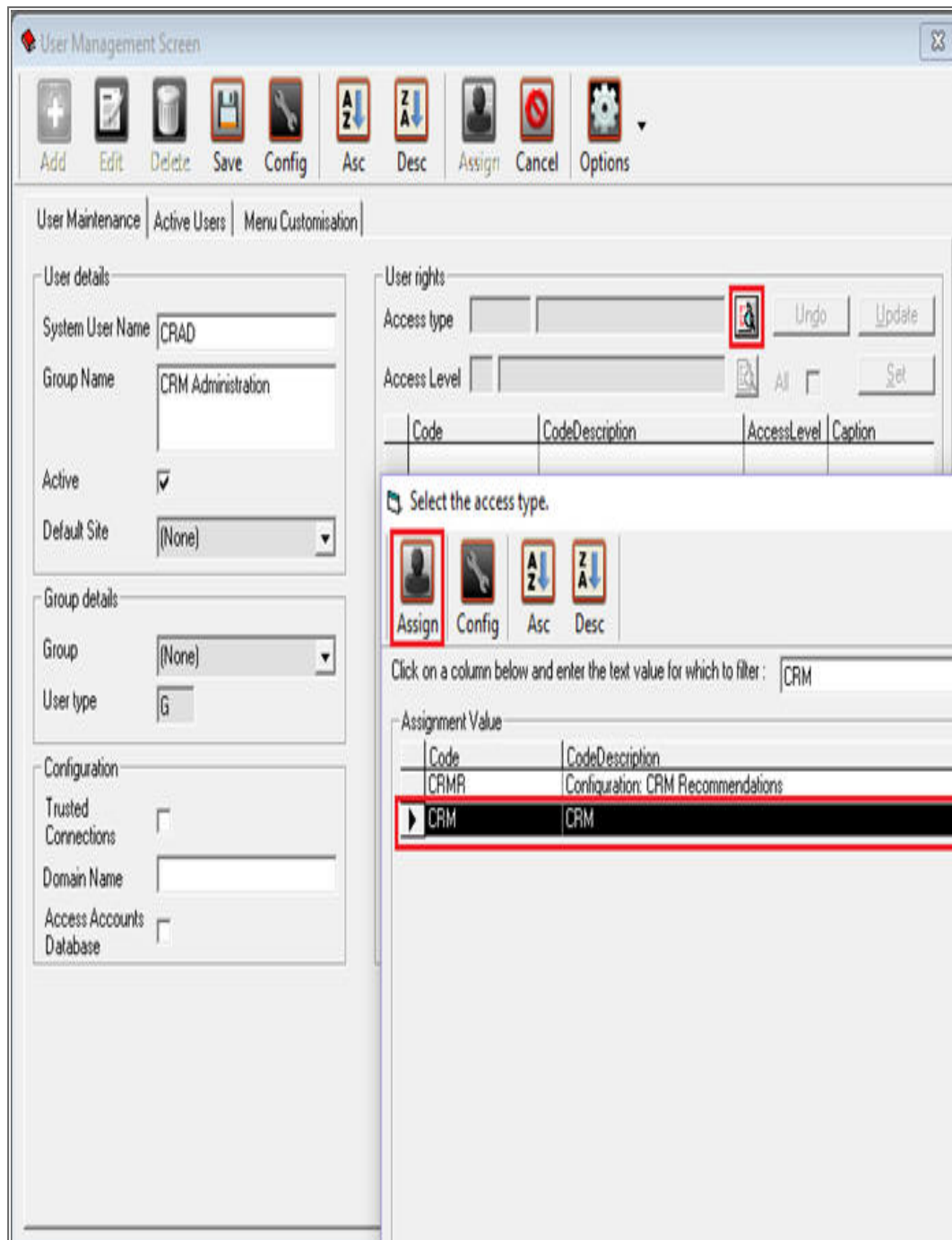
User rights

Access type:

Access Level:

Code	CodeDescription	AccessLevel	Capion











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



- Look for the security right that you need to set. In this example I am going to set 'Release Customer' to NoAccess for CRM Administration Group.

- Click on the text box in the 'Access Level' column, and then click on the arrow that appears.
- Select the security level from the lookup list.
- Click on the 'Assign' button. You will see the AccessLevel code change when done.

User Management Screen

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  

Access Level:  All 

Code	CodeDescription	AccessLevel	Caption
FRMCUST	CRM form: Customer page	2	
FRMCUSTRELEASE	CRM form: Release Customer	2	
FRMLSTACTIVITIES	CRM form: List Activities	2	
FRMLSTCALLS			
FRMLSTCALLS1800			
FRMLSTCALLSOPEN			
FRMLSTCASES			
FRMLSTCRNOTES			
FRMLSTCTRCTEXP			
FRMLSTCTRCTEXP			
FRMLSTCTRCTS			
FRMLSTCUST			
FRMLSTCUSTFILES			
FRMLSTINVOICES			

Select the item from the list of User Rights
















Click on a column below and enter the text value for which to filter:

Assignment Value	
IdCode	IdCodeDescription
1	Unlimited Access
2	Full Access
3	Limited Access
4	No Access

- Click on the 'Update' button.
- This will save the changes to the database.

User Management Screen

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

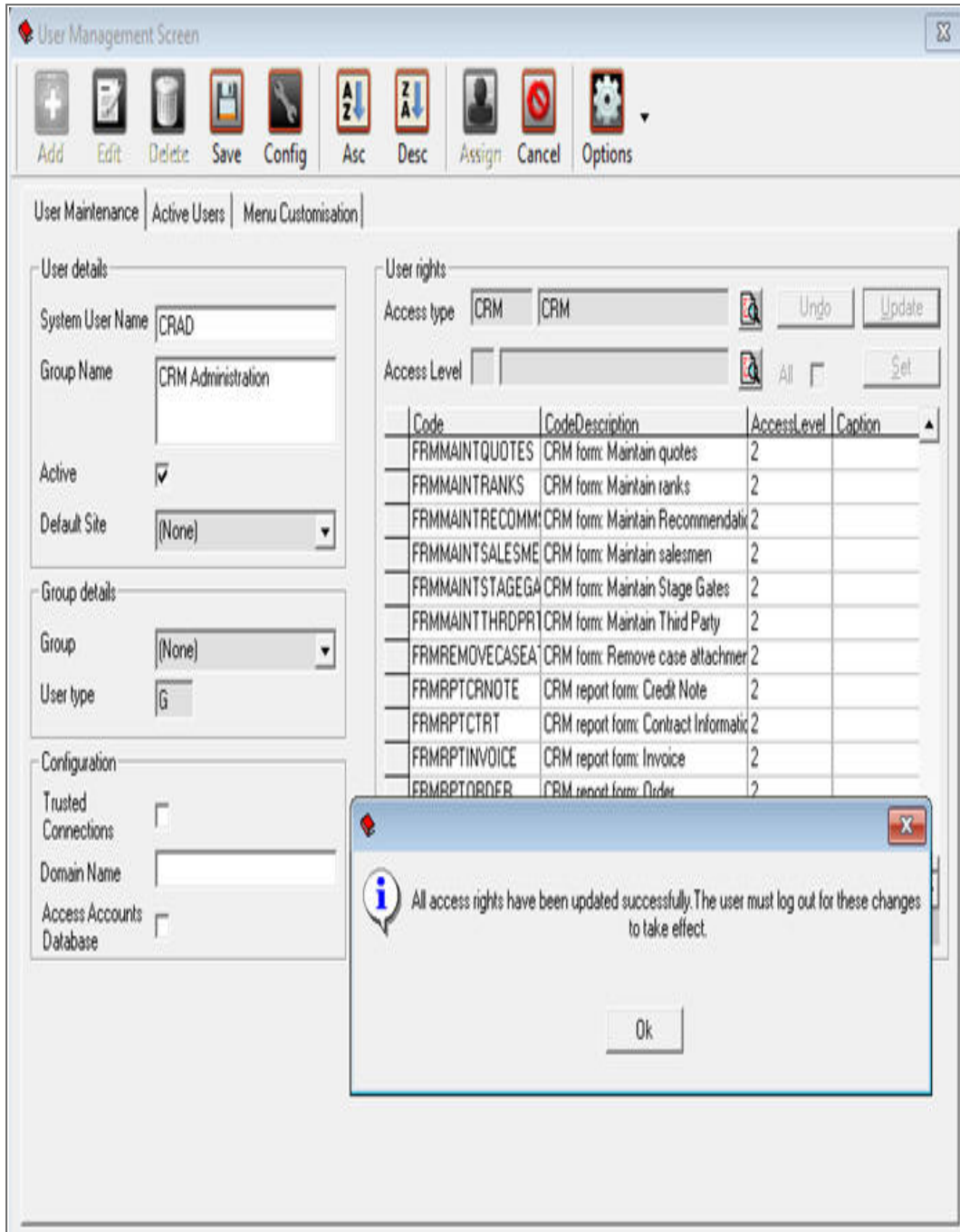
Access Level:

Undo Update

Code	CodeDescription	AccessLevel	Caption
FRMCUST	CRM form: Customer page	2	
FRMCUSTRELEASE	CRM form: Release Customer	4	
FRMLSTACTIVITIES	CRM form: List Activities	2	
FRMLSTCALLS	CRM form: List Customer Calls	2	
FRMLSTCALLS180D	CRM form: List Customer Calls in last 180 days	2	
FRMLSTCALLSOPEN	CRM form: List Customer Calls Open	2	
FRMLSTCASES	CRM form: List Cases	2	
FRMLSTCRNOTES	CRM form: Credit Notes	2	
FRMLSTCTRCTEXPR	CRM form: List Customer Contracts Expiring	2	
FRMLSTCTRCTEXPR	CRM form: List Customer Contracts Expiring	2	
FRMLSTCTRCTS	CRM form: List Customer Contracts	2	
FRMLSTCUST	CRM form: List Customers	2	
FRMLSTCUSTFILES	CRM form: View customer files list	2	
FRMLSTINVOICES	CRM form: List Invoices	2	

- A message box will come up advising: 'All access rights have been updated successfully. the user must log out for these changes to take effect.'

- For all users who are currently logged into BPO and/or BPOCRM, they will need to log out of BPO and/or BPOCRM and log back in.



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

Access Level: ☐ All

Undo Update

Code	CodeDescription	AccessLevel	Caption
FRMMAINTQUOTES	CRM form: Maintain quotes	2	
FRMMAINTRANKS	CRM form: Maintain ranks	2	
FRMMAINTRECOMM	CRM form: Maintain Recommendation	2	
FRMMAINTSALESME	CRM form: Maintain salesmen	2	
FRMMAINTSTAGEGA	CRM form: Maintain Stage Gates	2	
FRMMAINTTHRDPR	CRM form: Maintain Third Party	2	
FRMREMOVECASEA	CRM form: Remove case attachment	2	
FRMRPTCRNOTE	CRM report form: Credit Note	2	
FRMRPTCTRT	CRM report form: Contract Information	2	
FRMRPTINVOICE	CRM report form: Invoice	2	
FRMRPTORDER	CRM report form: Order	2	

All access rights have been updated successfully. The user must log out for these changes to take effect.

Ok

CRM.000.003

