

We are currently updating our site; thank you for your patience.

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.

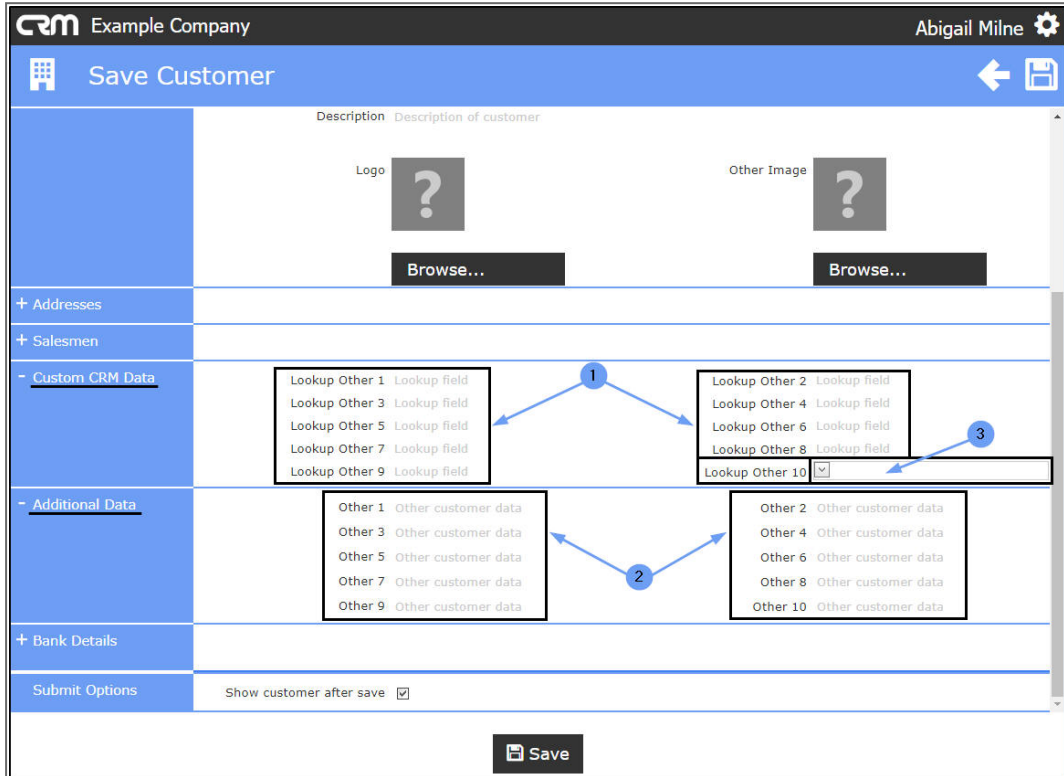
- These captions are configured by [User Group](#).
- In Custom CRM Data there are **10** [drop-down](#) fields.
- In Additional Data there are **10** [free text](#) fields.
- Information can be added to these fields when you are [creating a new customer](#) or [editing a customer](#).
- View the details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

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

Here you can view:

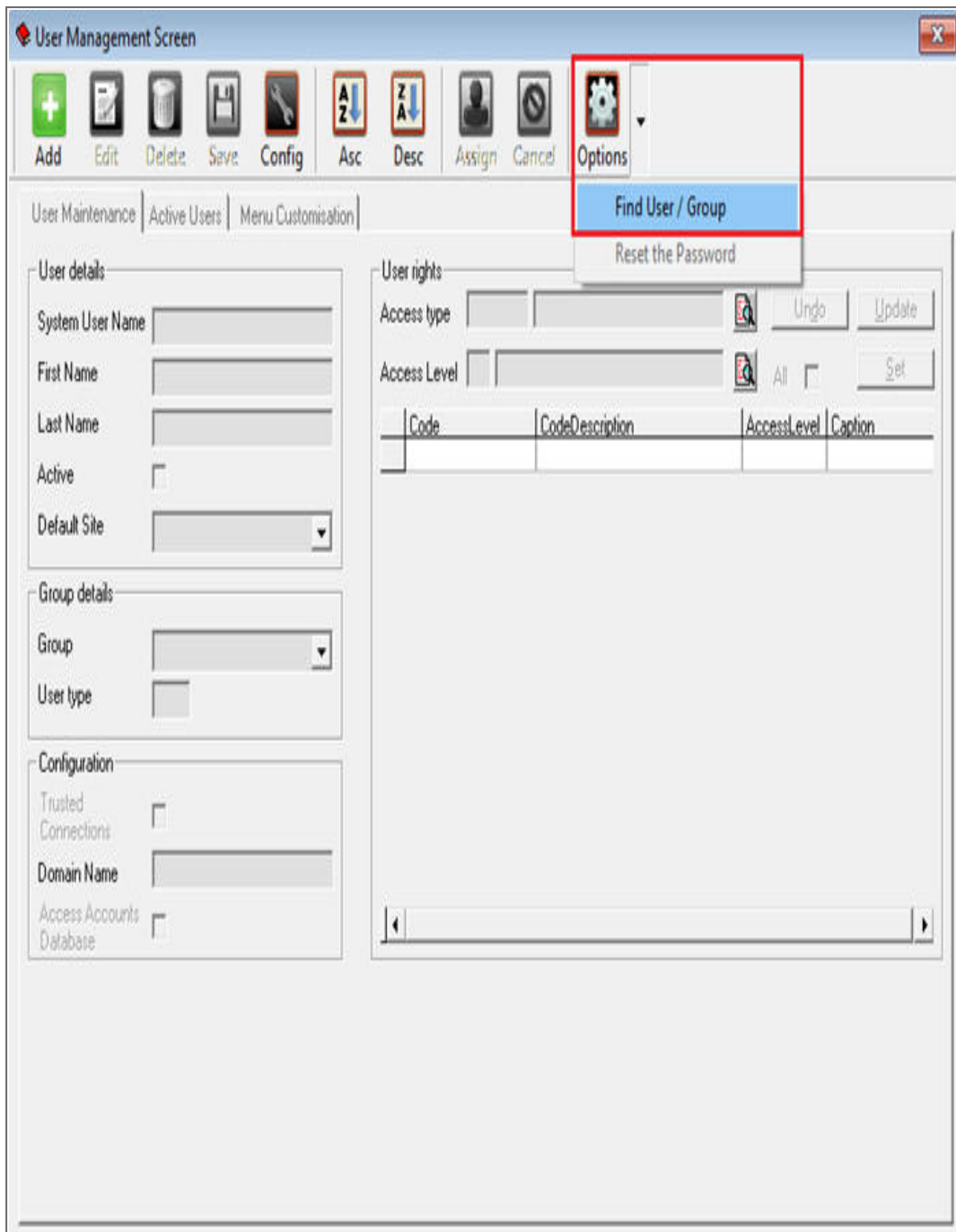
1. Custom CRM Data **captions** and drop-down **options**.
2. Additional Data **captions** and drop-down **options**.
3. In this example, note that the **Lookup Other 10** field in Custom CRM Data is currently blank.



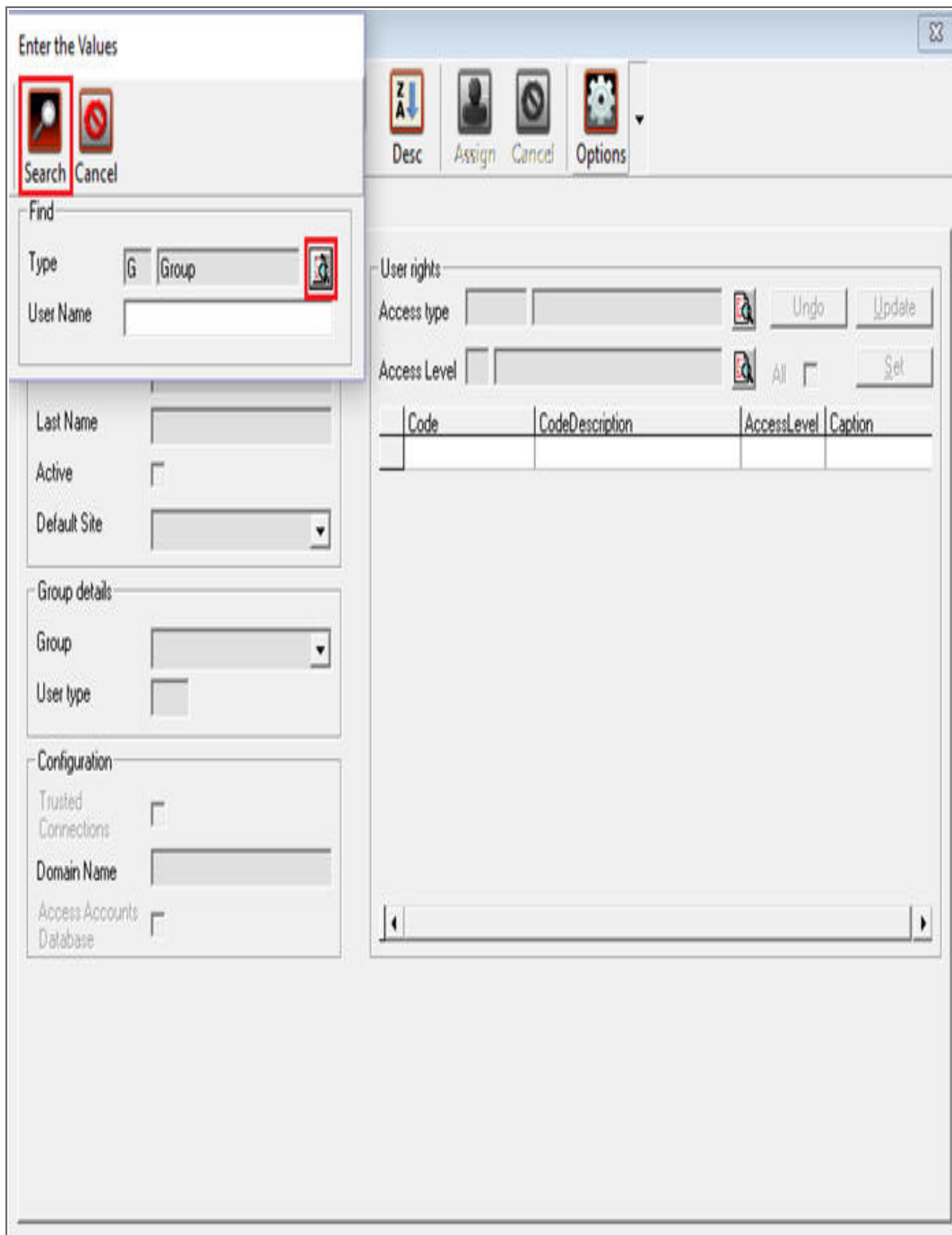
SET CUSTOM CRM DATA FIELD CAPTIONS

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

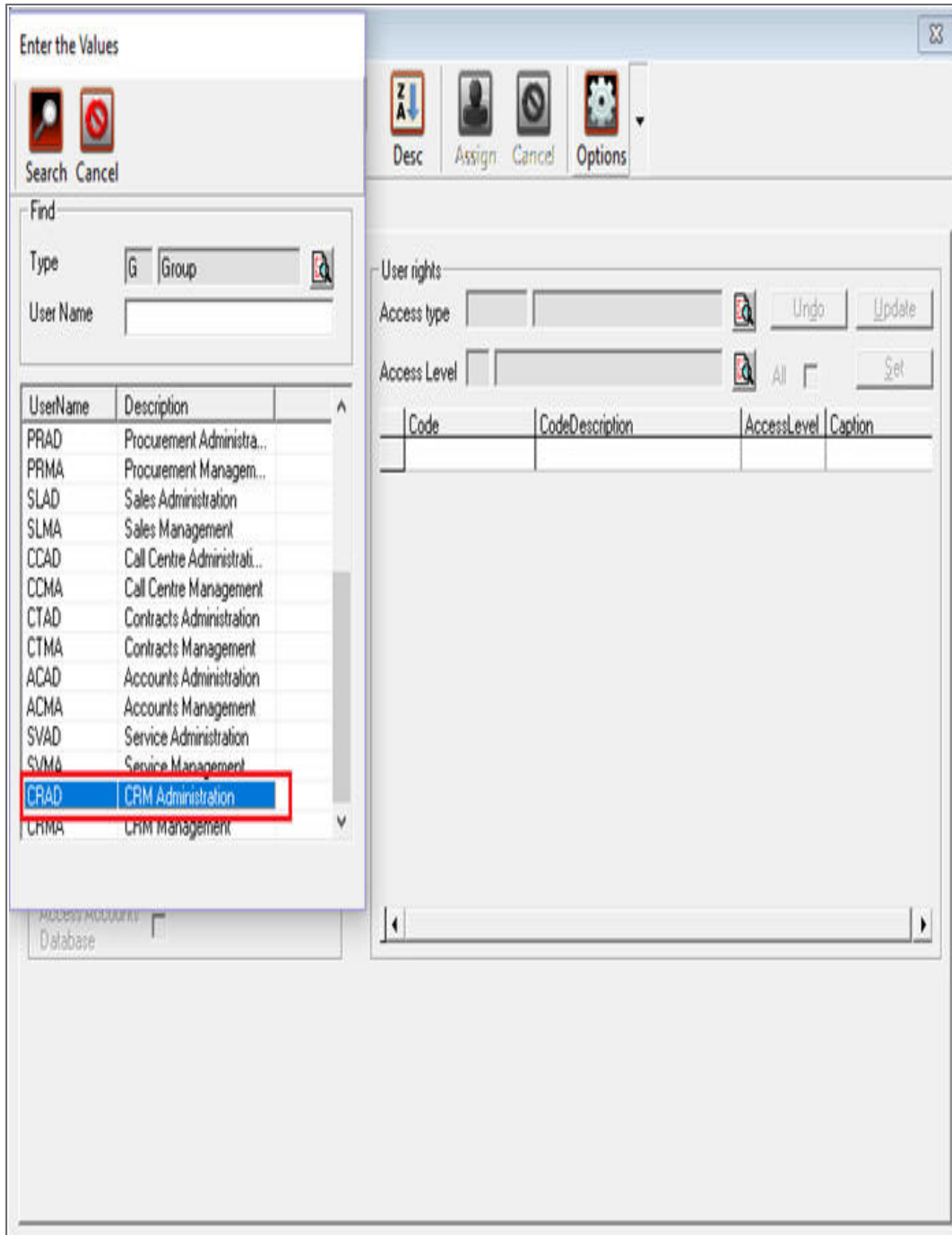
- Click on the Options menu and select 'Find User/Group'



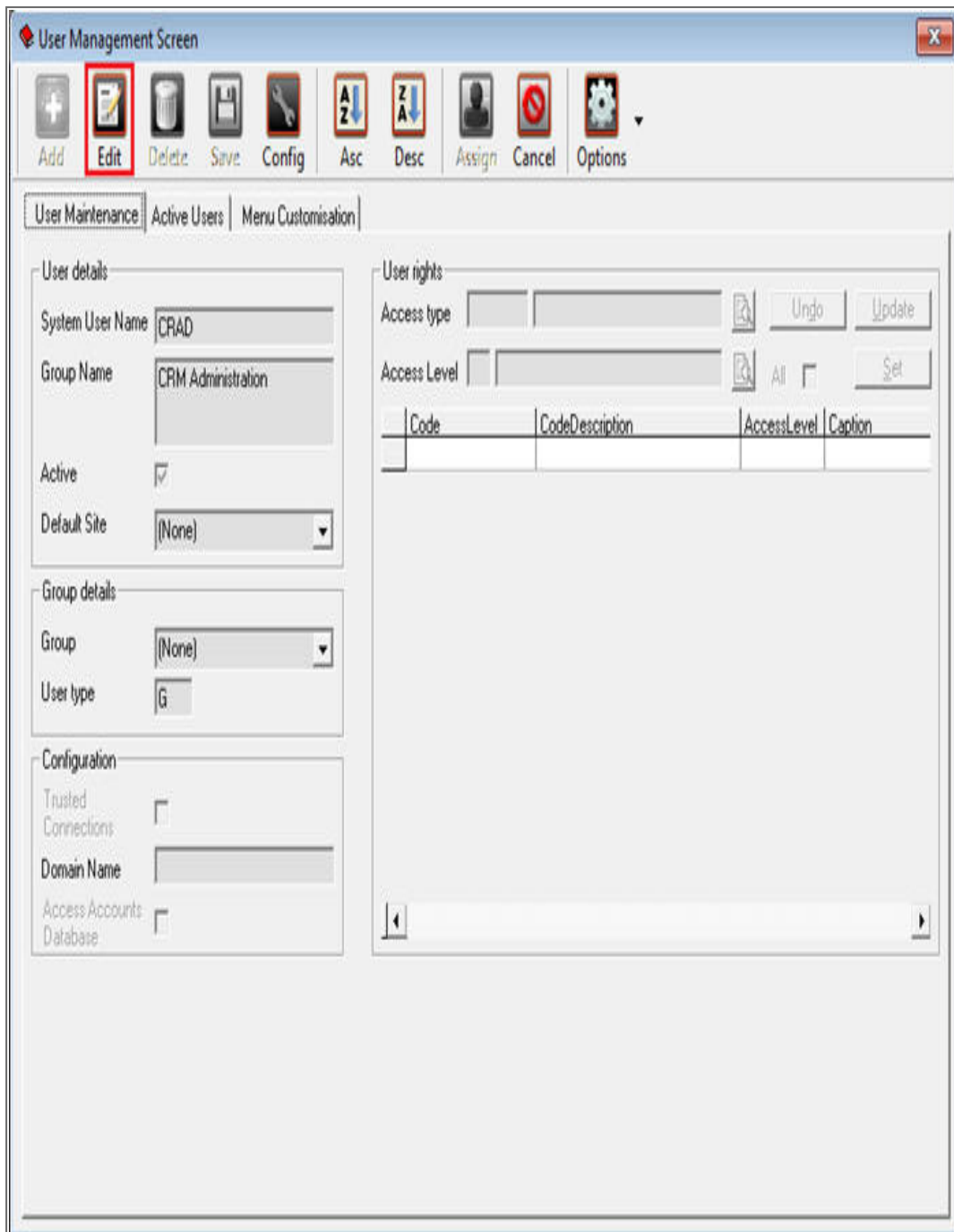
- Click on the '**Type**' search box and select 'Group'
- Click on the form main 'Search' button



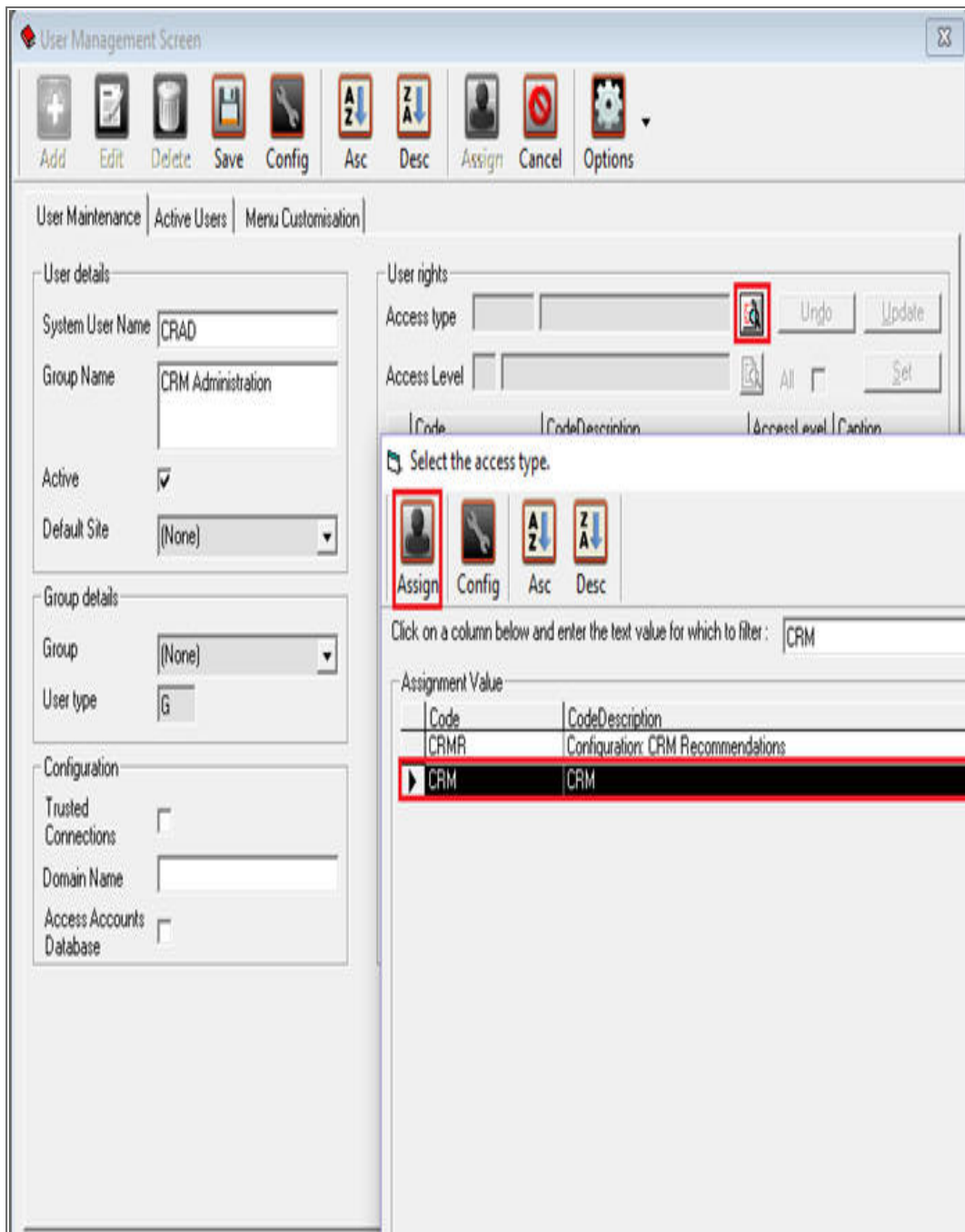
- Scroll down in the list of User Groups to find the Group you need to edit
- Double click on the UserGroup line



- Click on the 'Edit' button.



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



- **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.

The screenshot shows the 'User Management Screen' with the following sections:

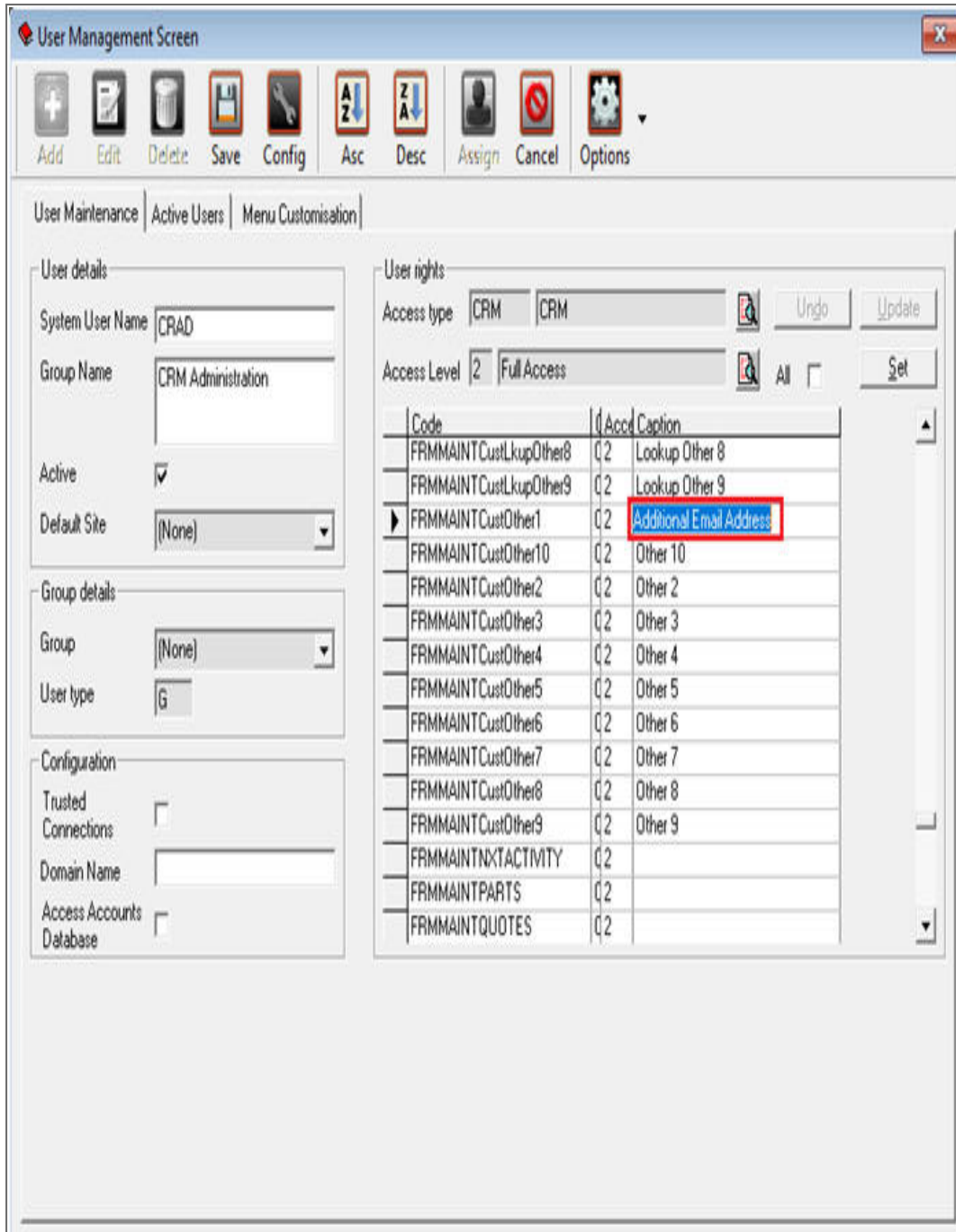
- User details:** System User Name: CRAD, Group Name: CRM Administration, Active: , Default Site: (None).
- Group details:** Group: (None), User type: G.
- Configuration:** Trusted Connections: , Domain Name: [text field], Access Accounts Database: .
- User rights:** Access type: CRM, Access Level: 2, Full Access. A 'Set' button is highlighted in red.

Code	Accel	Caption
FRMMAINTCUST	C2	
FRMMAINTCustLkupOther1	C2	Favourite Sport
FRMMAINTCustLkupOther10	C2	Lookup Other 10
FRMMAINTCustLkupOther2	C2	Lookup Other 2
FRMMAINTCustLkupOther3	C2	Lookup Other 3
FRMMAINTCustLkupOther4	C2	Lookup Other 4
FRMMAINTCustLkupOther5	C2	Lookup Other 5
FRMMAINTCustLkupOther6	C2	Lookup Other 6
FRMMAINTCustLkupOther7	C2	Lookup Other 7
FRMMAINTCustLkupOther8	C2	Lookup Other 8
FRMMAINTCustLkupOther9	C2	Lookup Other 9
FRMMAINTCustOther1	C2	Additional Email Address
FRMMAINTCustOther10	C2	Other 10
FRMMAINTCustOther2	C2	Other 2
FRMMAINTCustOther3	C2	Other 3

SET ADDITIONAL DATA FIELD CAPTIONS

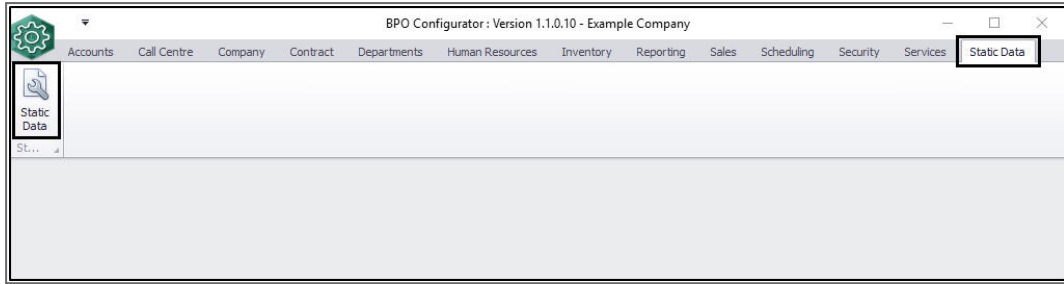
Ribbon Access: BPO: Administration > Security > User Group and Security

- 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.

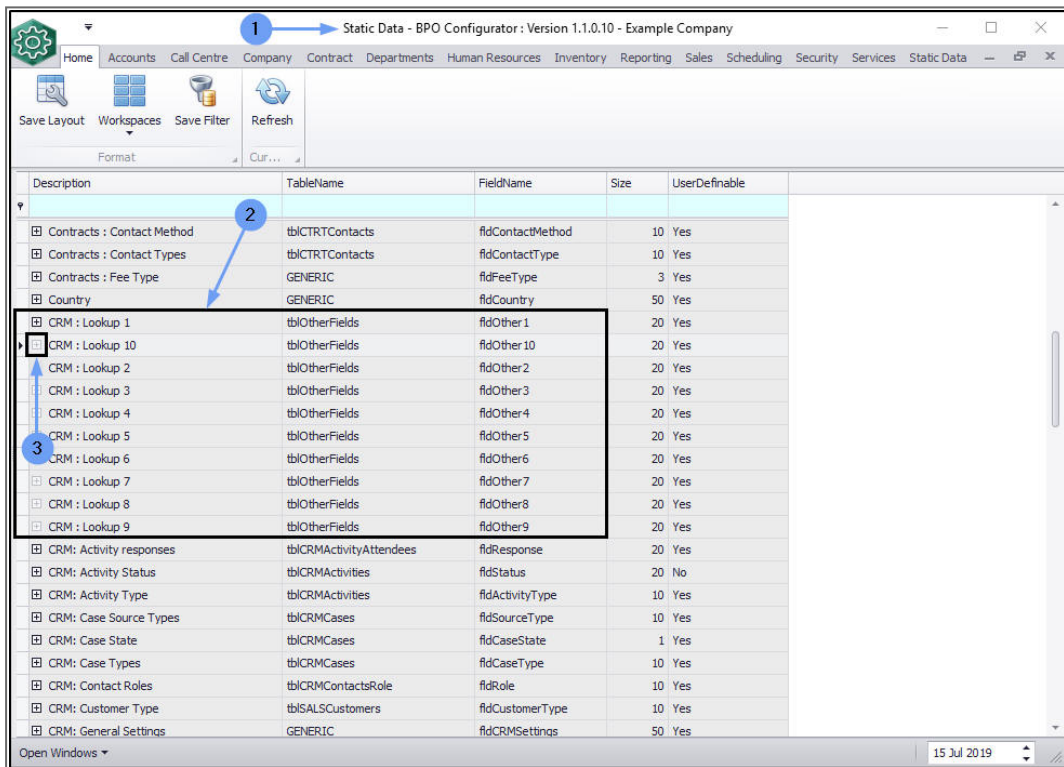


SET CUSTOM CRM DATA DROP-DOWN FIELD ITEMS

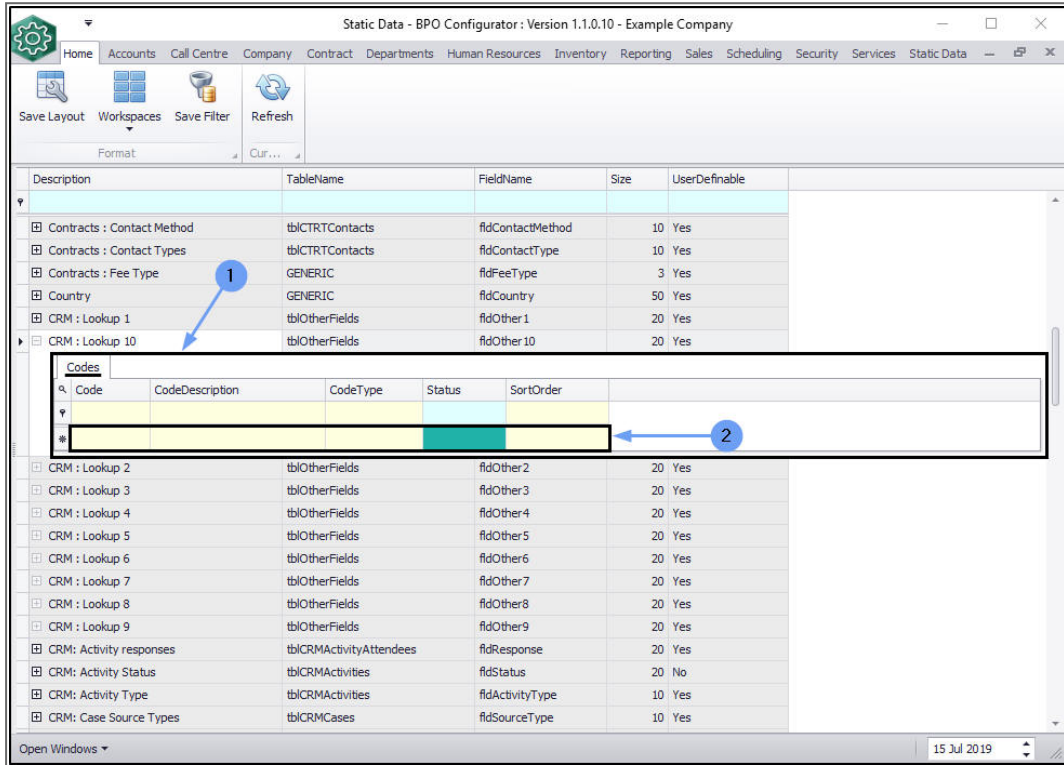
Ribbon Access: Configurator > Static Data > Static Data



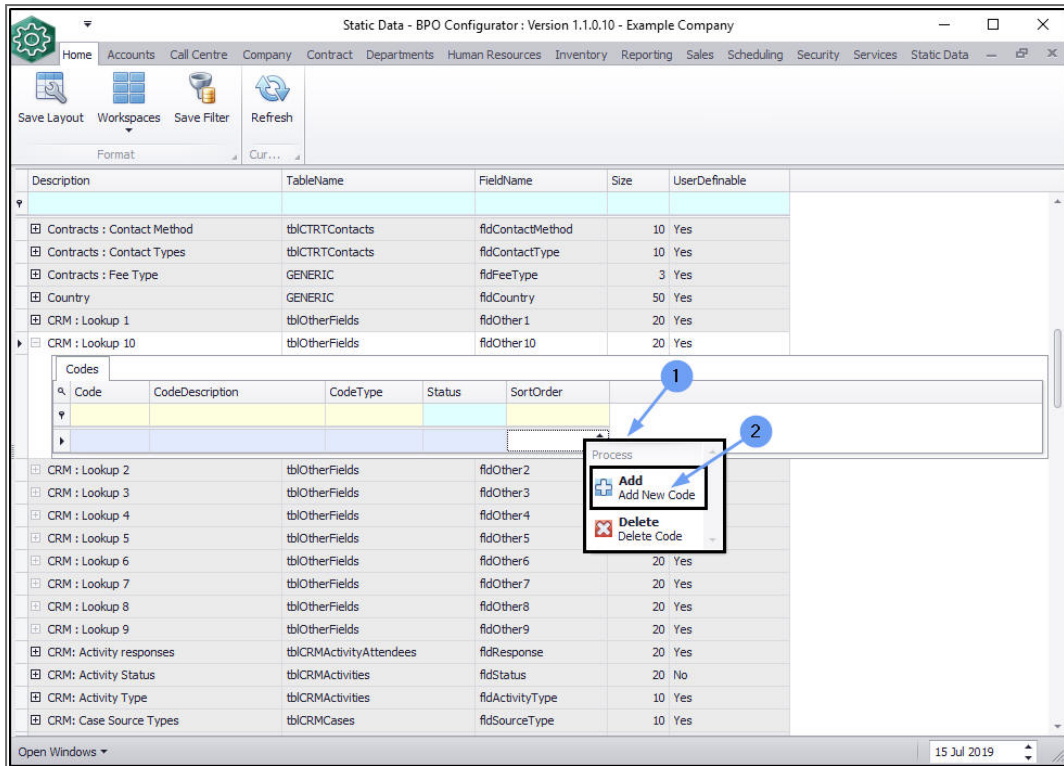
1. The **Static Data** screen will be displayed.
2. Scroll down the list or use the **filter row** to find the CRM: Lookup fields.
3. Click on the **expand** button in front of the particular field that you wish to add field **items** to.
 - As noted above, the **Lookup Other 10** field in Custom CRM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



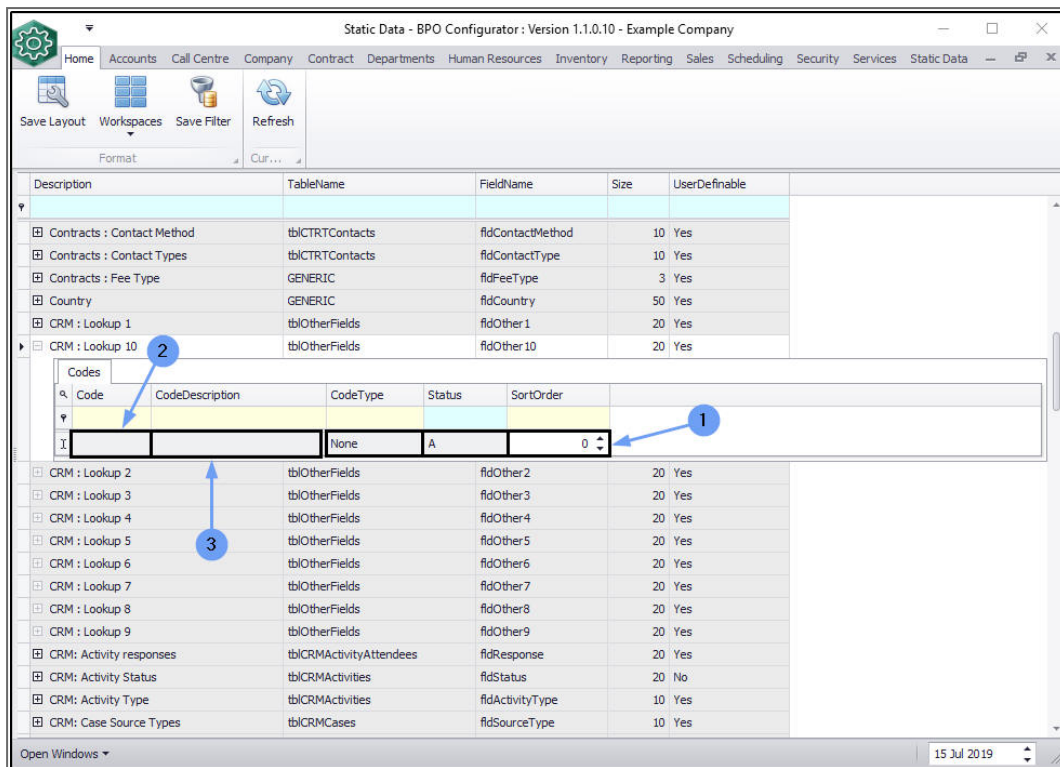
1. The **Codes** frame will be expanded.
 - This data grid does not currently contain any information as nothing has been set up yet.
2. **Right click** anywhere in the blank row (not the filter row) of this **Codes** data grid.



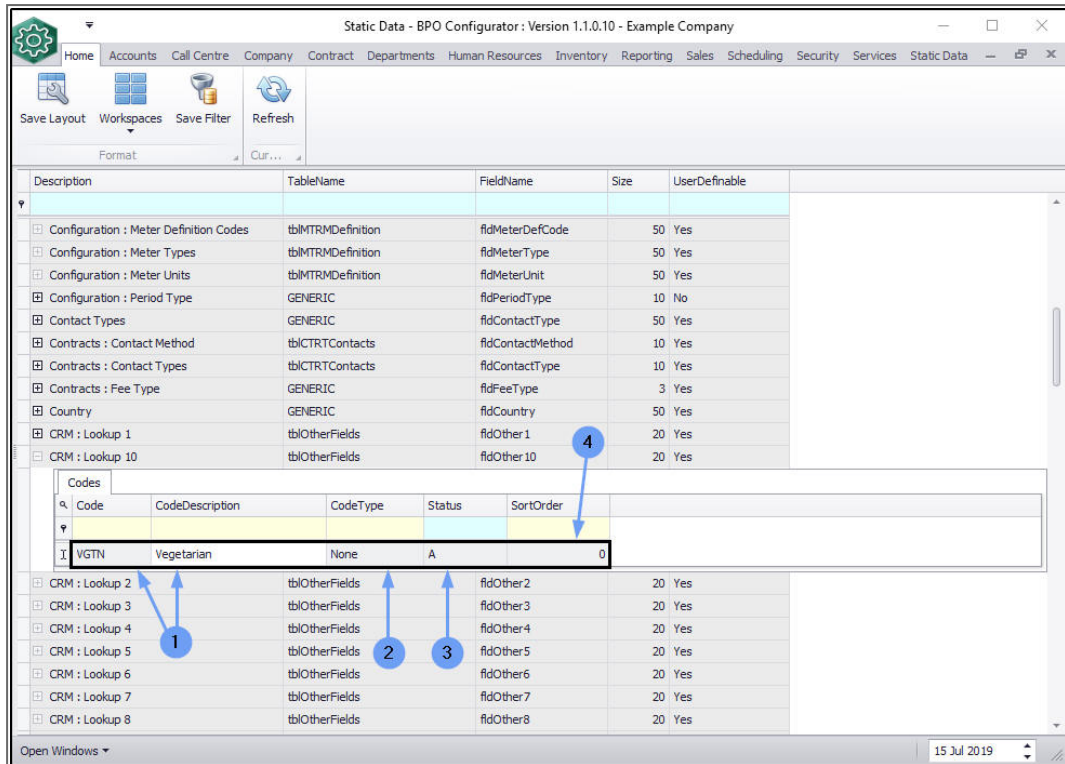
- A **Process** menu will pop up.
- Click on **Add** - Add New Code.



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.

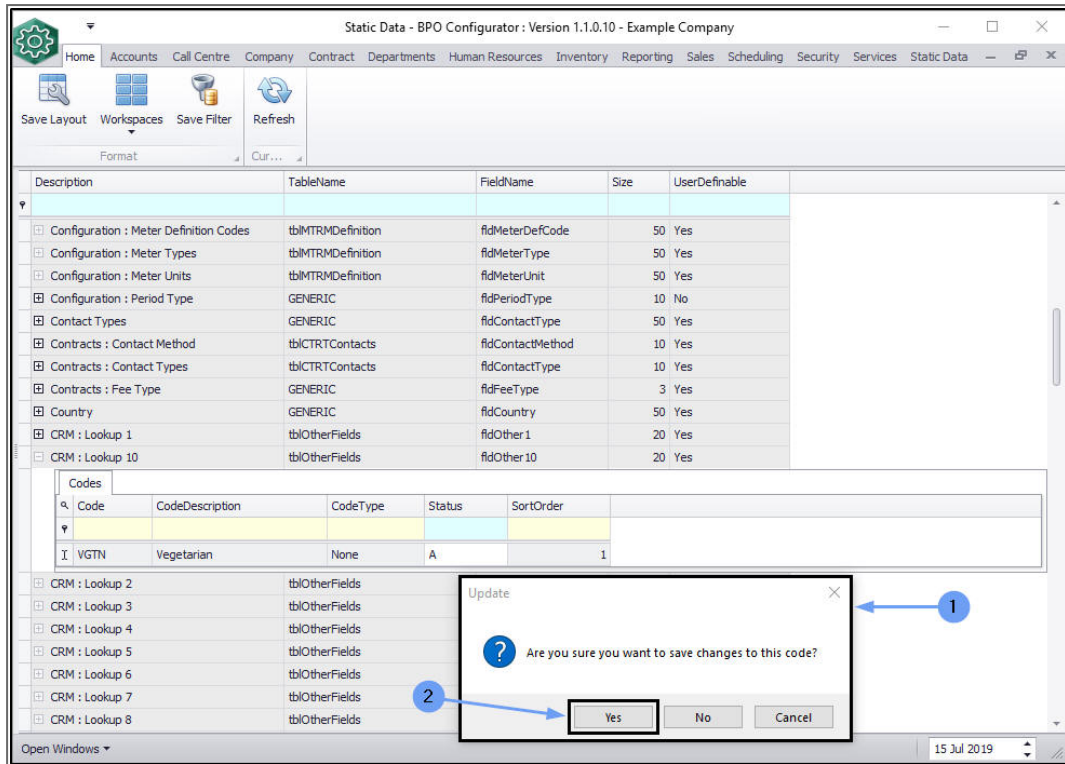


1. Once you have entered the **Code** and **Code Description**, move across to the remaining columns.
2. **Code Type:** This can remain as **None**.
3. **Status:** This will auto populate with **A** - Active.
4. **Sort Order:** Click in this text box and either type in or use the arrow indicators to 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 Nucleus Service. 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 Nucleus Service. 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 Nucleus Service.

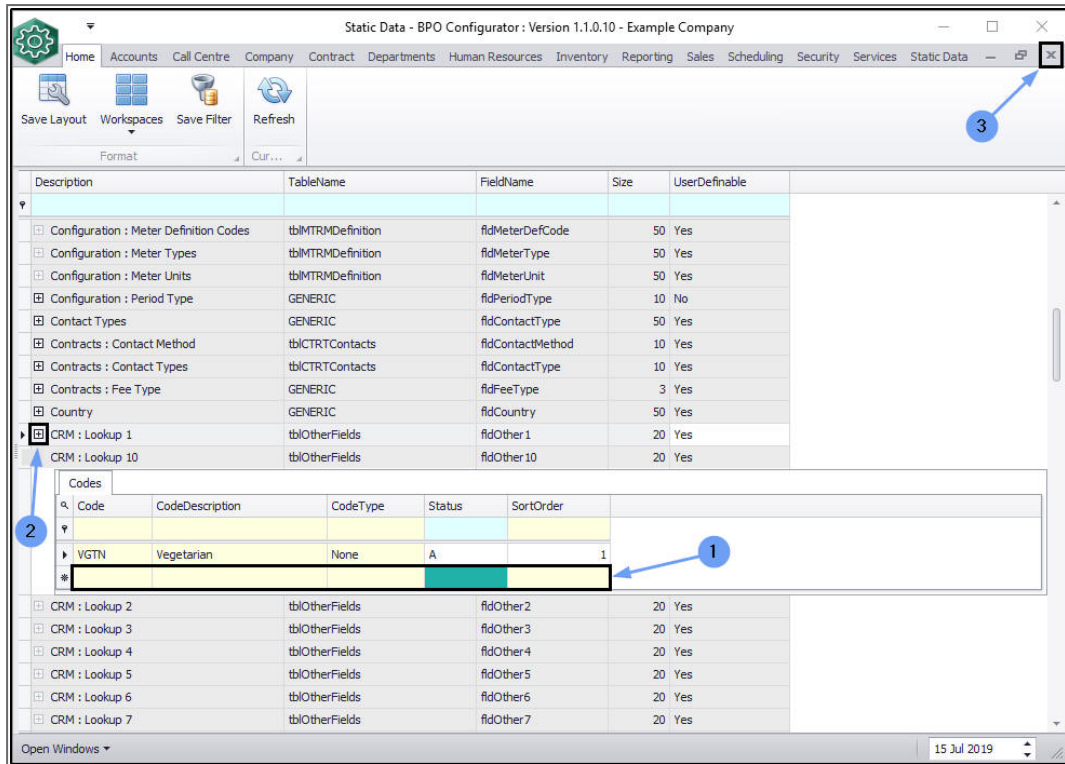


- When you have finished adding the new call error code details, either click outside of the Codes data grid or press **Enter** on your keyboard.

1. An **Update** message box will pop up, asking;
 - **Are you sure you want to save changes to this code?**
2. 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.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is titled 'Save Customer'. It includes several sections:

- Phone**: The phone number
- Rank**: Customer rank
- Trading Name**: The trading name if different
- Registered Name**: The registered name
- Description**: Description of customer
- Logo**: Image field with a 'Browse...' button
- Other Image**: Image field with a 'Browse...' button
- Custom CRM Data**: A table of lookup fields:

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

At the bottom is a 'Save' button. Two callouts are present: '1' points to the 'Description' field, and '2' points to the 'Lookup Other 10' field.

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

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main form is titled 'Save Customer'. It contains several sections:

- More Details:** Fields for website, phone, rank, trading name, registered name, and description. There are also image upload fields for 'Logo' and 'Other Image', each with a 'Browse...' button.
- Custom CRM Data:** A section containing ten 'Lookup Other' fields. The 'Lookup Other 10' field is expanded to show a dropdown menu with the option 'Vegetarian' selected. A circled '1' points to this dropdown.
- Submit Options:** A checkbox for 'Show customer after save' which is checked, and a 'Save' button.

CRM.000.021

