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.

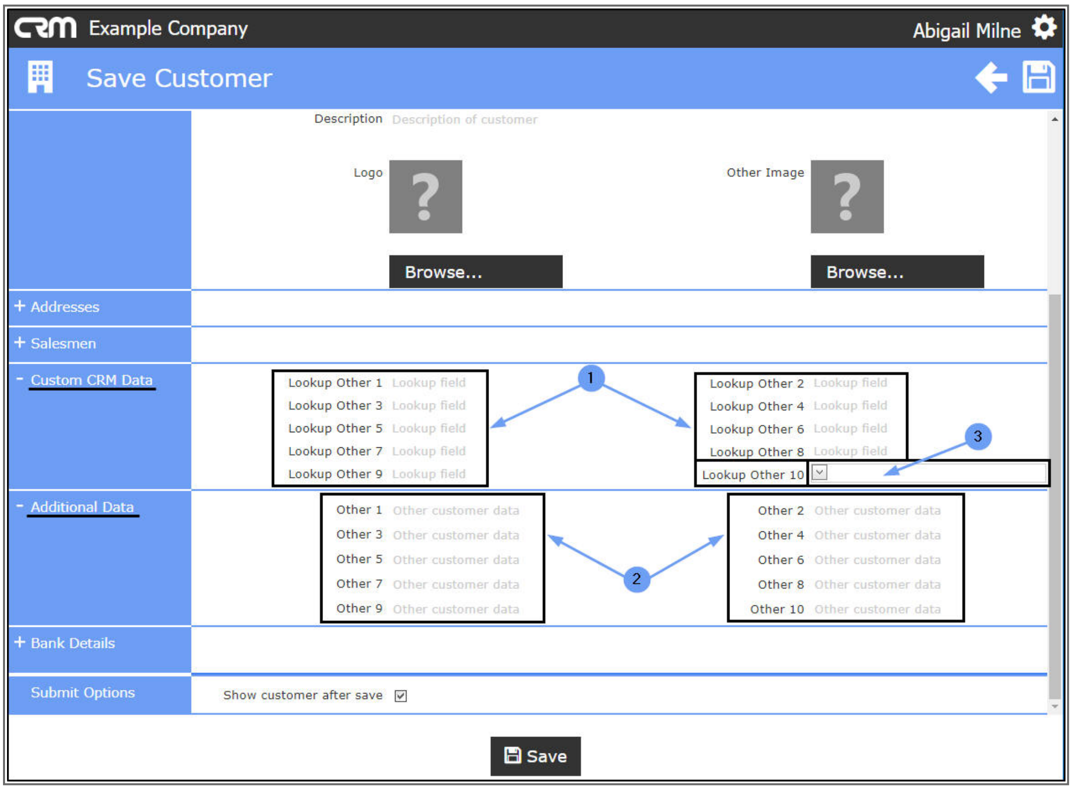
- These captions are configured by User Group.
- In Custom CRM Data there are **10** drop-down fields.
- In Additional Data there are **10** free text fields.
- Information can be added to these fields when you are creating a new customer or editing a customer.
- View the details below to configure the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

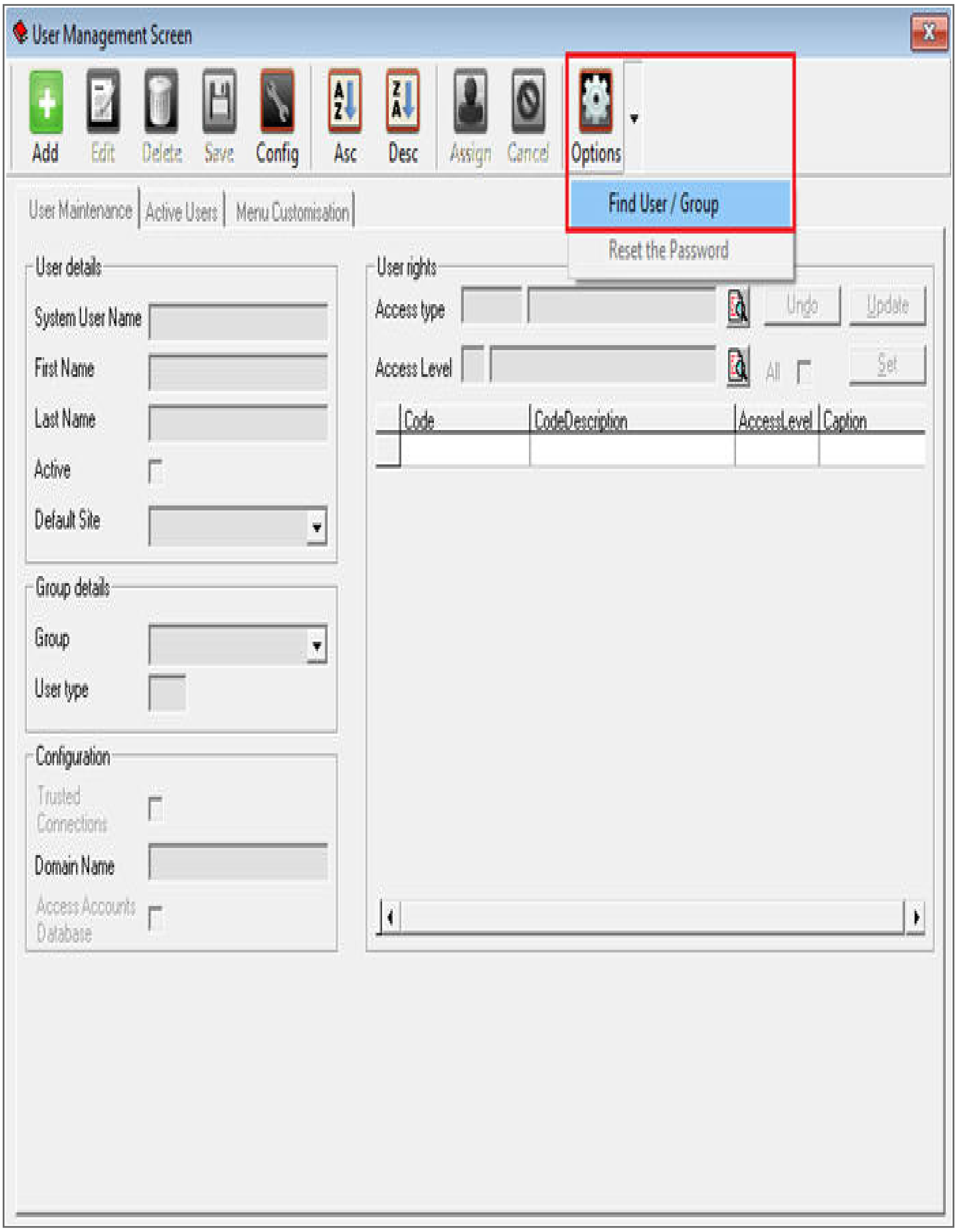
1. Custom CRM Data ***captions*** and drop-down ***options***.
2. Additional Data ***captions*** and drop-down ***options***.
3. In this example, note that the ***Lookup Other 10*** field in Custom CRM Data is currently blank.



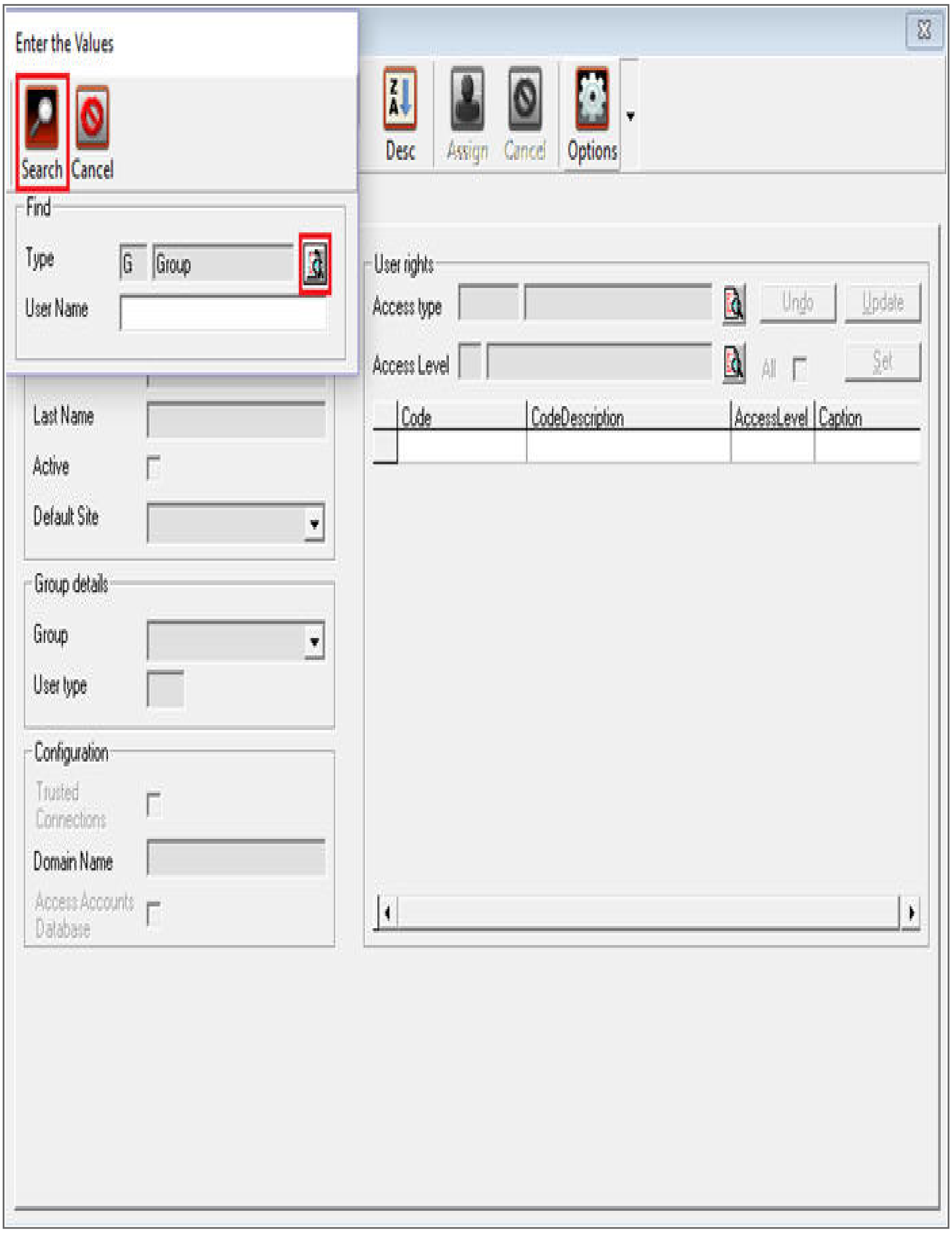
SET CUSTOM CRM DATA FIELD CAPTIONS

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

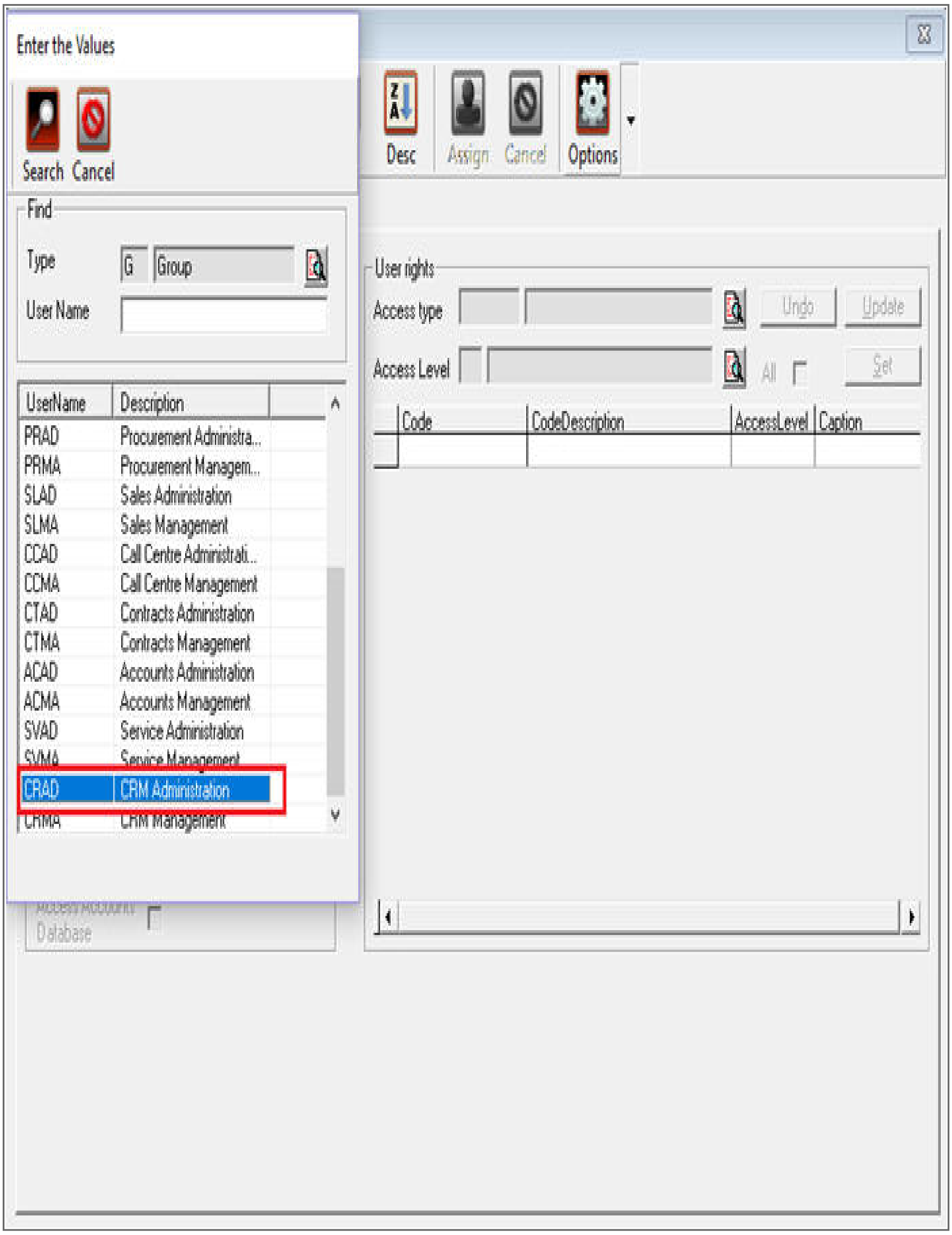
- Click on the Options menu and select 'Find User/Group'



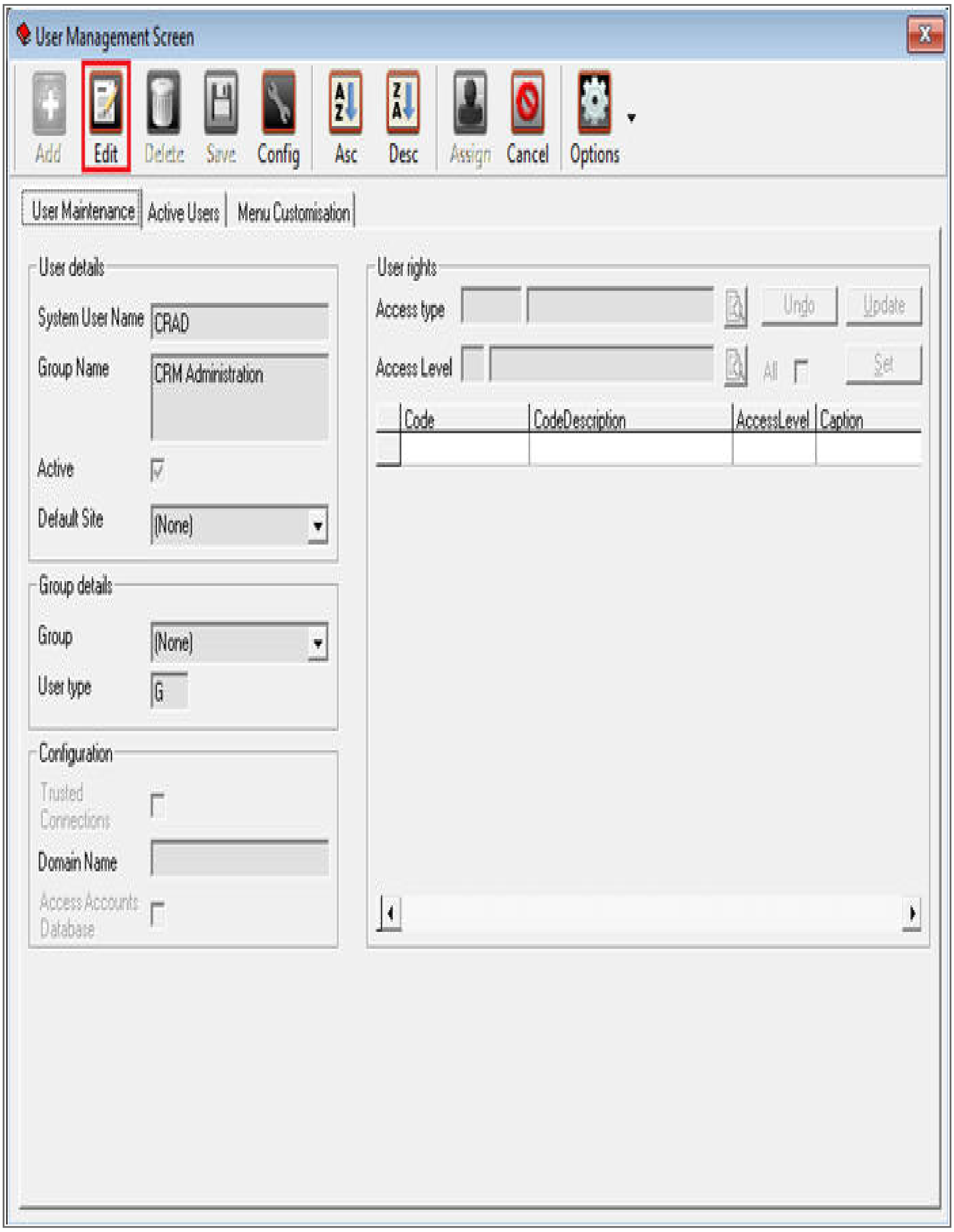
- Click on the '**Type**' search box and select 'Group'
- Click on the form main 'Search' button



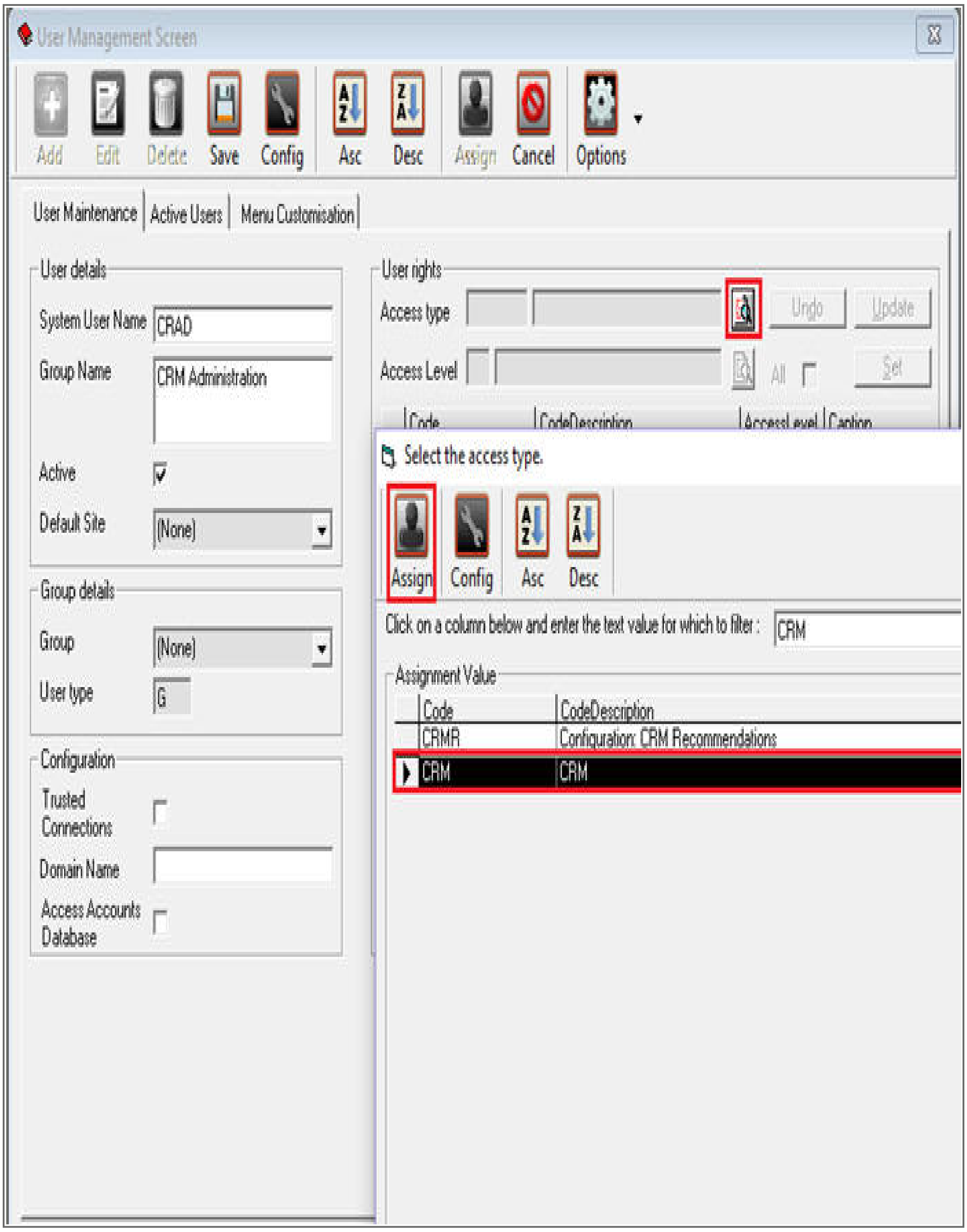
- Scroll down in the list of User Groups to find the Group you need to edit
- Double click on the UserGroup line



- Click on the 'Edit' button.

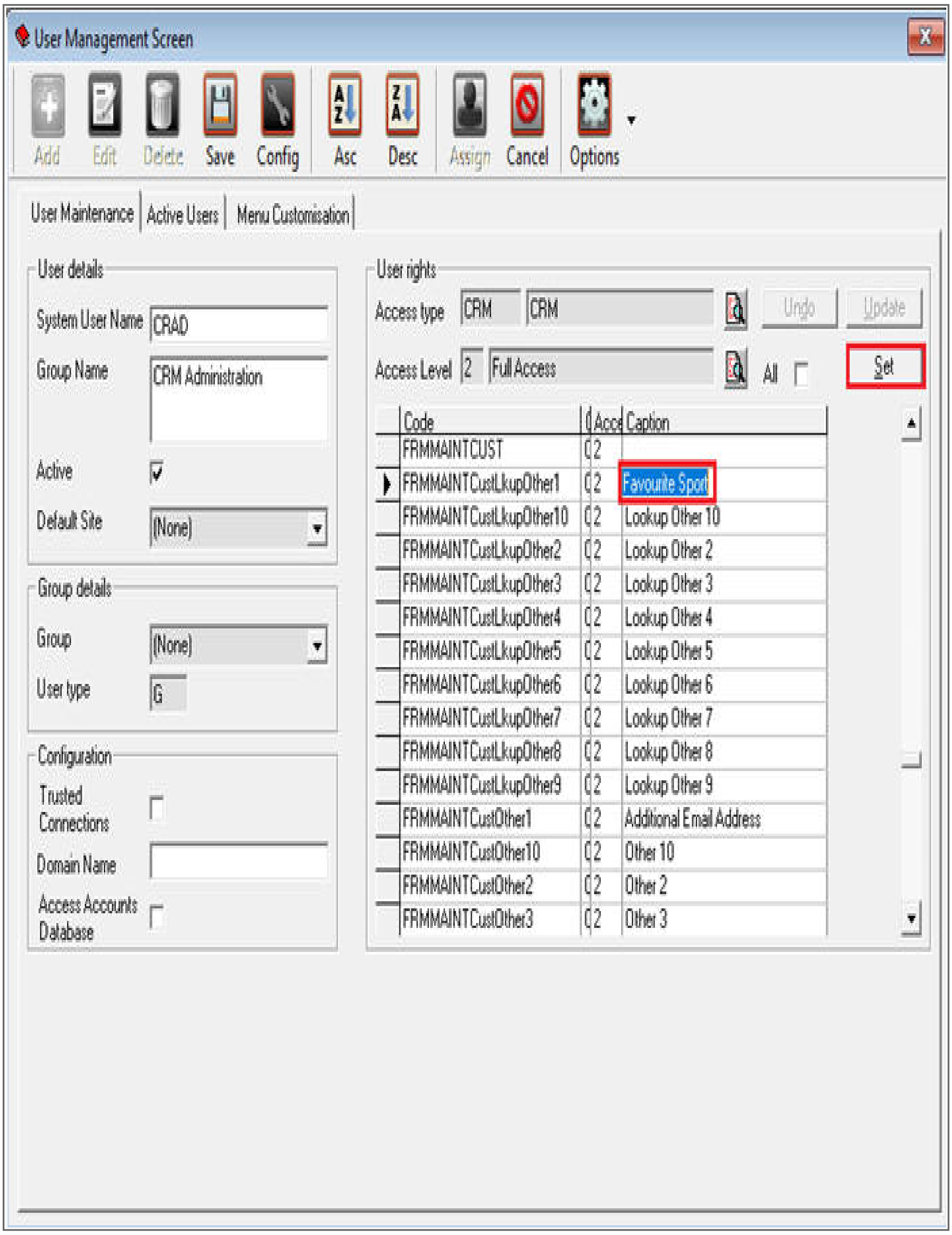


- **Access Type:** Click on the 'Search' button.
- Search for 'CRM' in the Code Description.
- Select the row and click on the 'Assign' button.



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

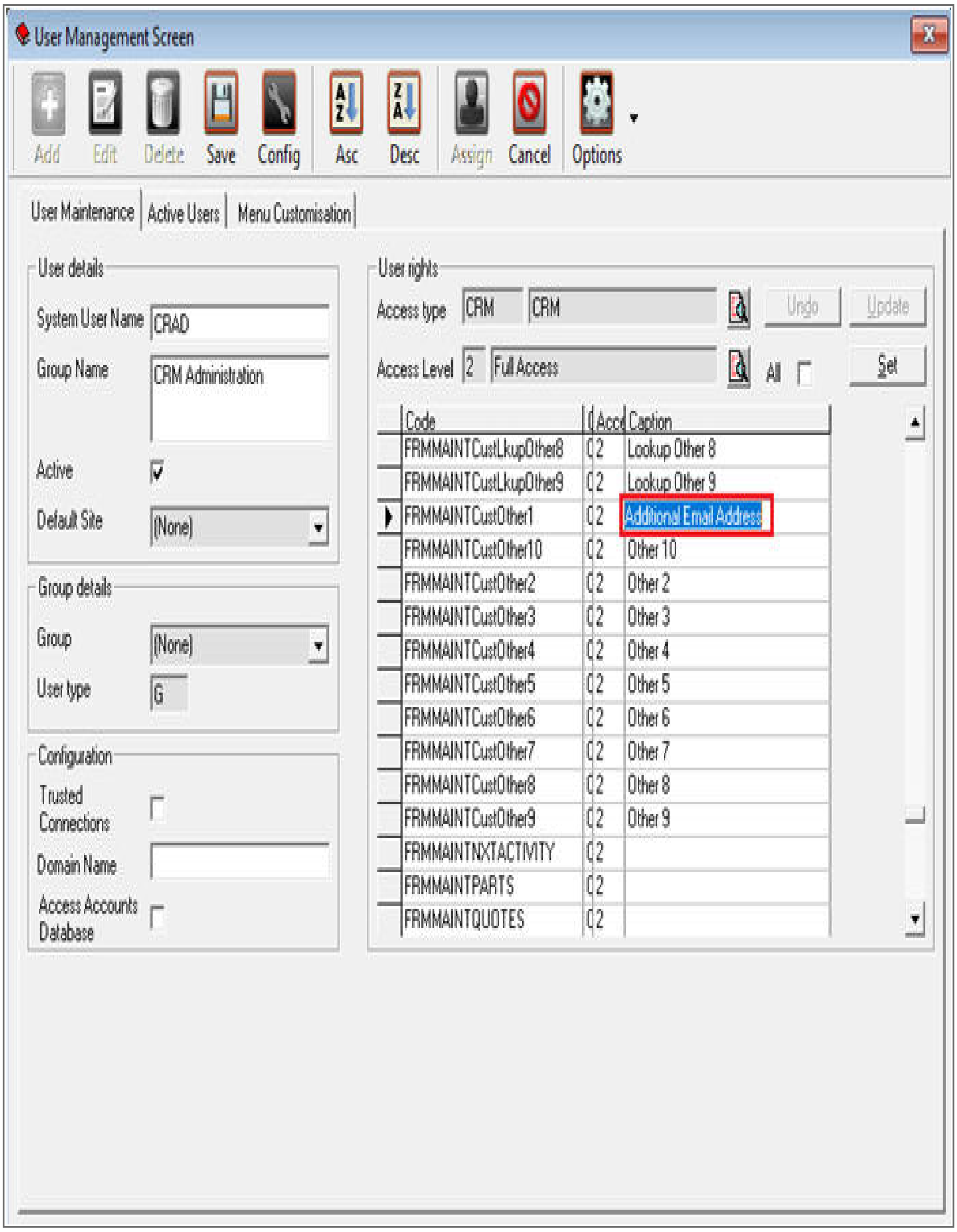
- Click on the 'Set' button. **Note**: If the Set button is not available, then reselect that line's access level.



SET ADDITIONAL DATA FIELD CAPTIONS

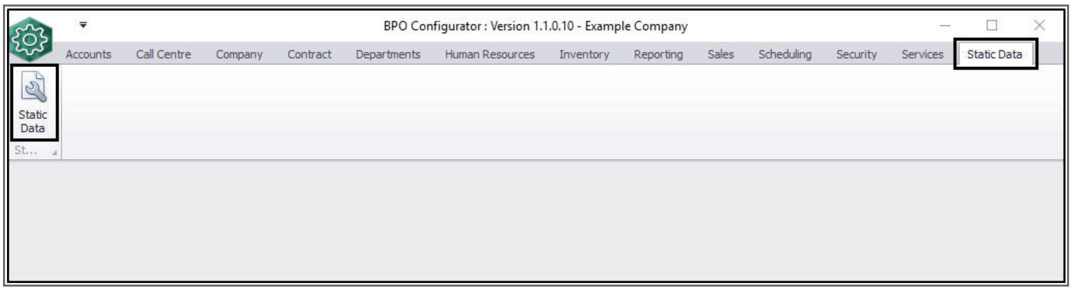
Ribbon Access: *BPO: Administration > Security > User Group and Security*

- 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.

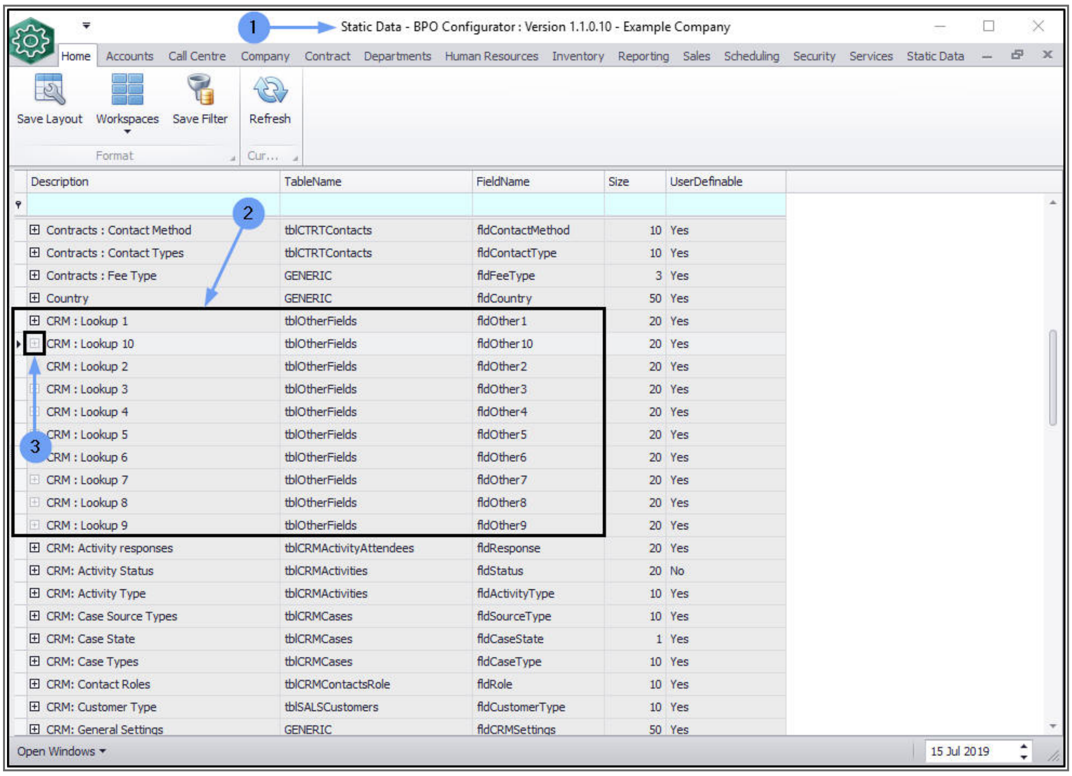


SET CUSTOM CRM DATA DROP-DOWN FIELD ITEMS

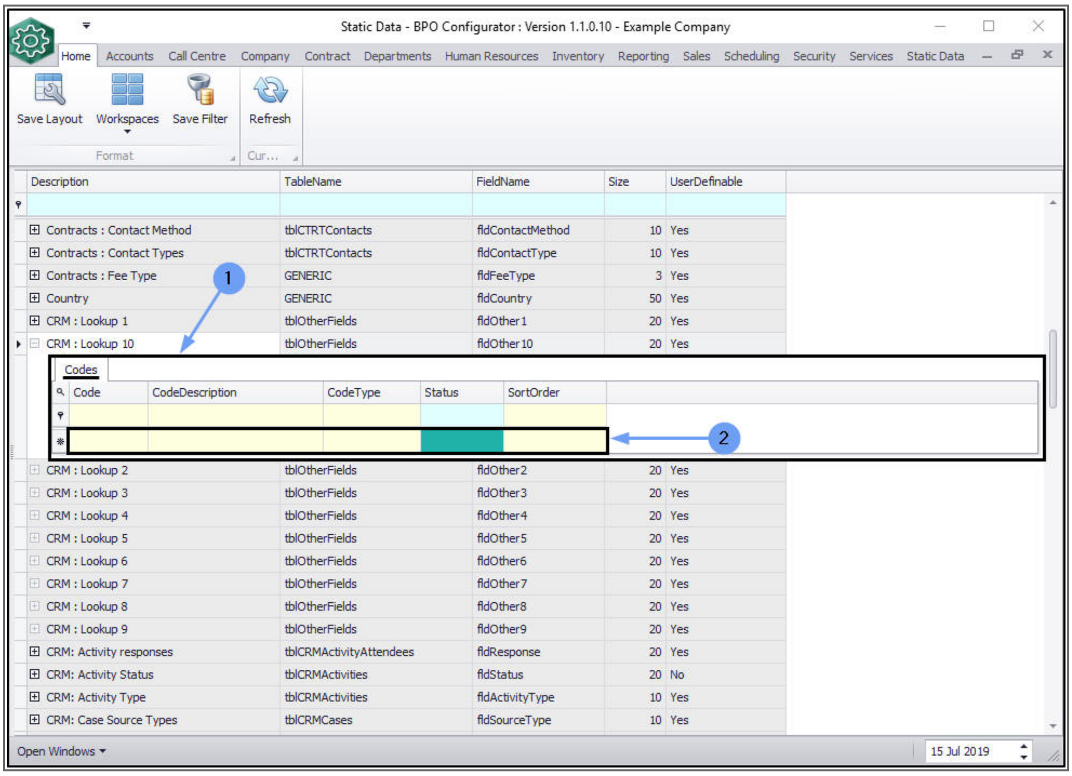
Ribbon Access: *Configurator > Static Data > Static Data*



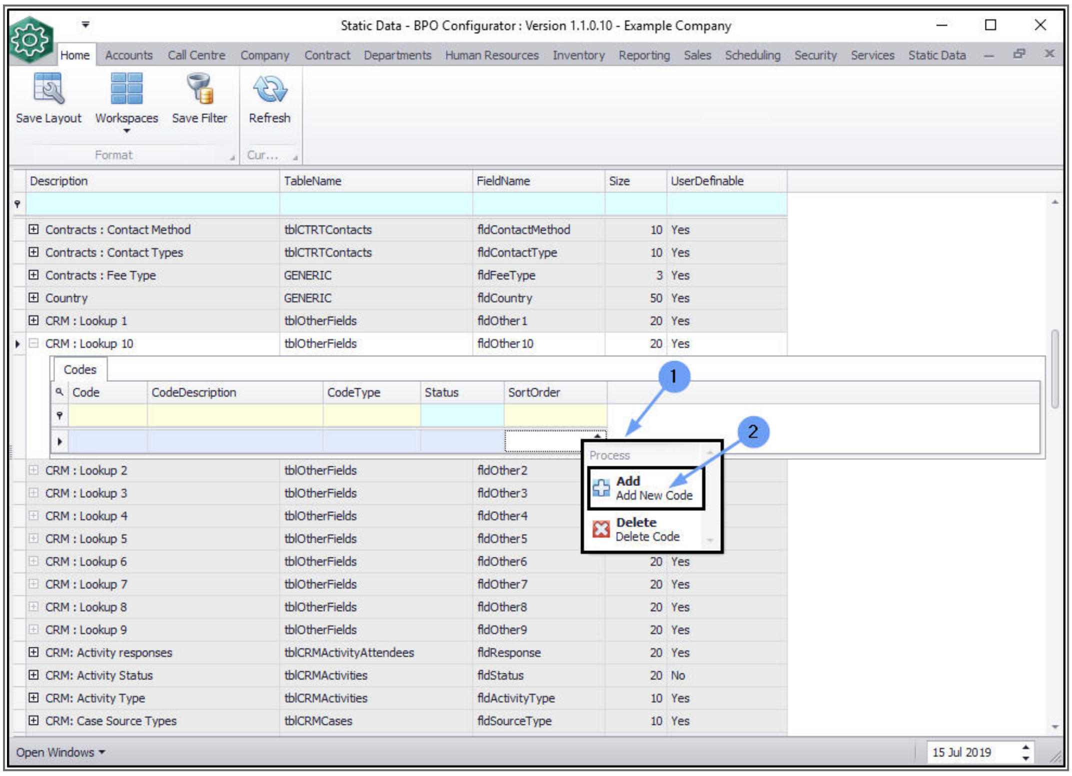
1. The ***Static Data*** screen will be displayed.
2. Scroll down the list or use the filter row to find the CRM: Lookup fields.
3. Click on the ***expand*** button in front of the particular field that you wish to add field ***items*** to.
    - As noted above, the ***Lookup Other 10*** field in Custom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



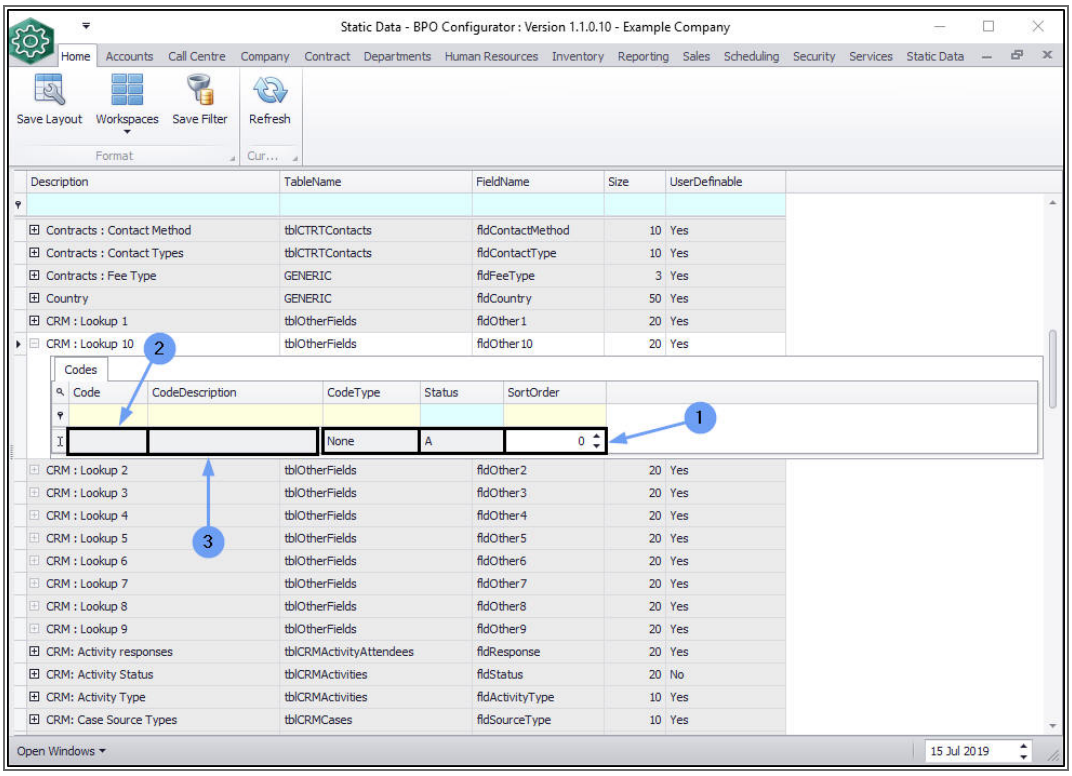
1. The ***Codes*** frame will be expanded.
    - This data grid does not currently contain any information as nothing has been set up yet.
2. ***Right click*** anywhere in the blank row (not the filter row) of this ***Codes*** data grid.



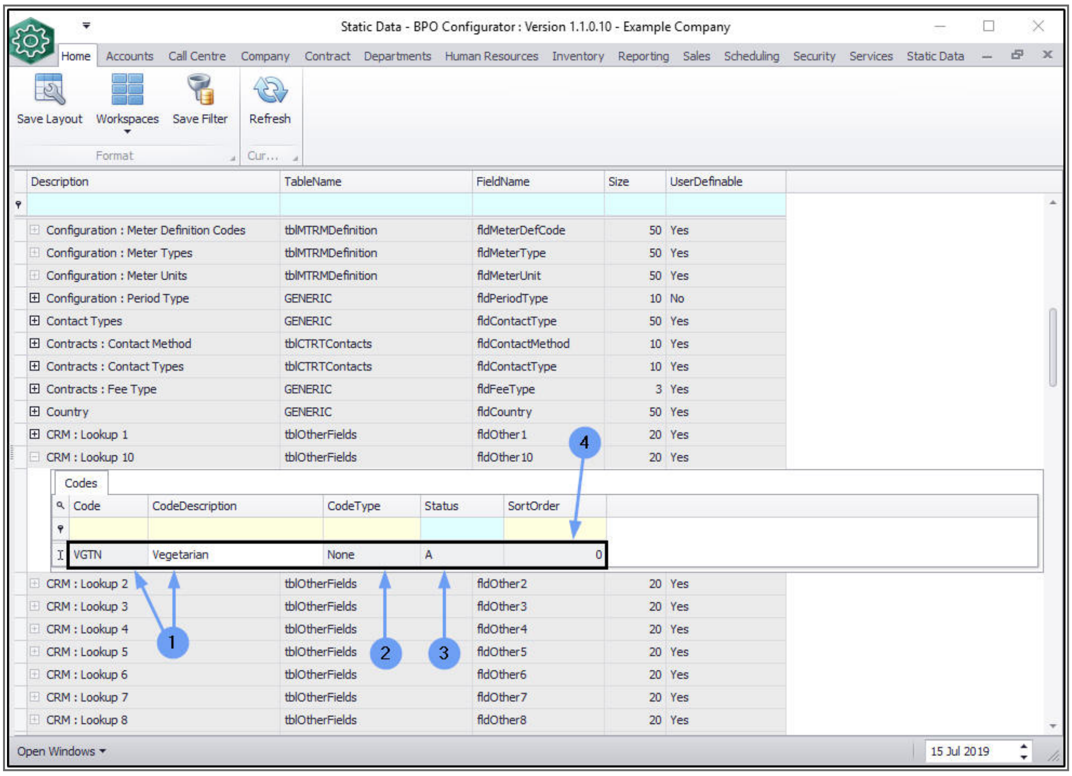
- A ***Process*** menu will pop up.
- Click on ***Add*** - Add New Code.



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.

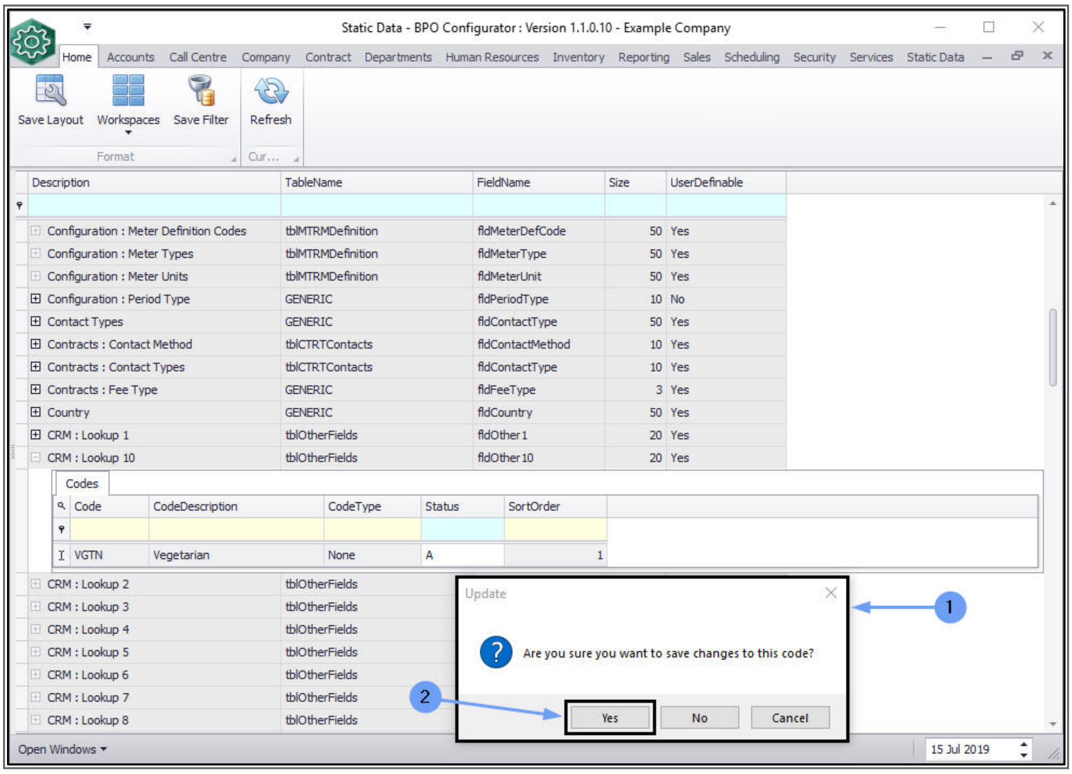


1. Once you have entered the ***Code*** and ***Code Description***, move across to the remaining columns.
2. **Code Type:** This can remain as ***None***.
3. **Status:** This will auto populate with **A** - Active.
4. **Sort Order:** Click in this text box and either type in or use the arrow indicators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

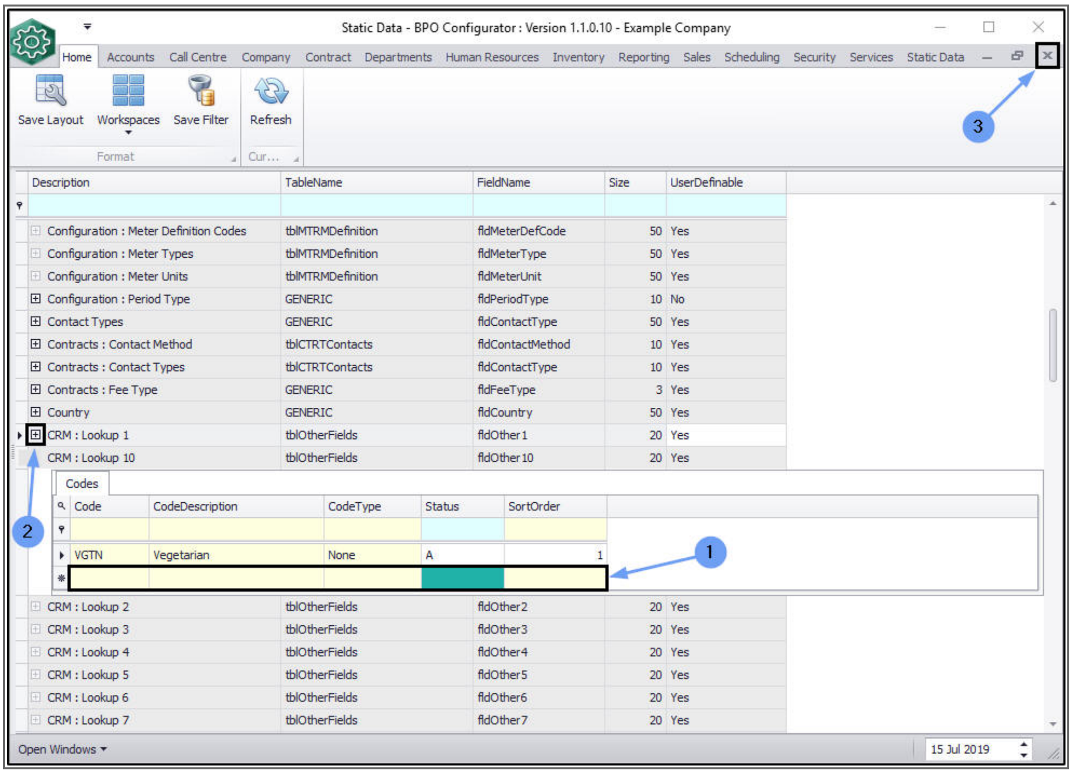


- When you have finished adding the new call error code details, either click outside of the Codes data grid or press ***Enter*** on your keyboard.

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.

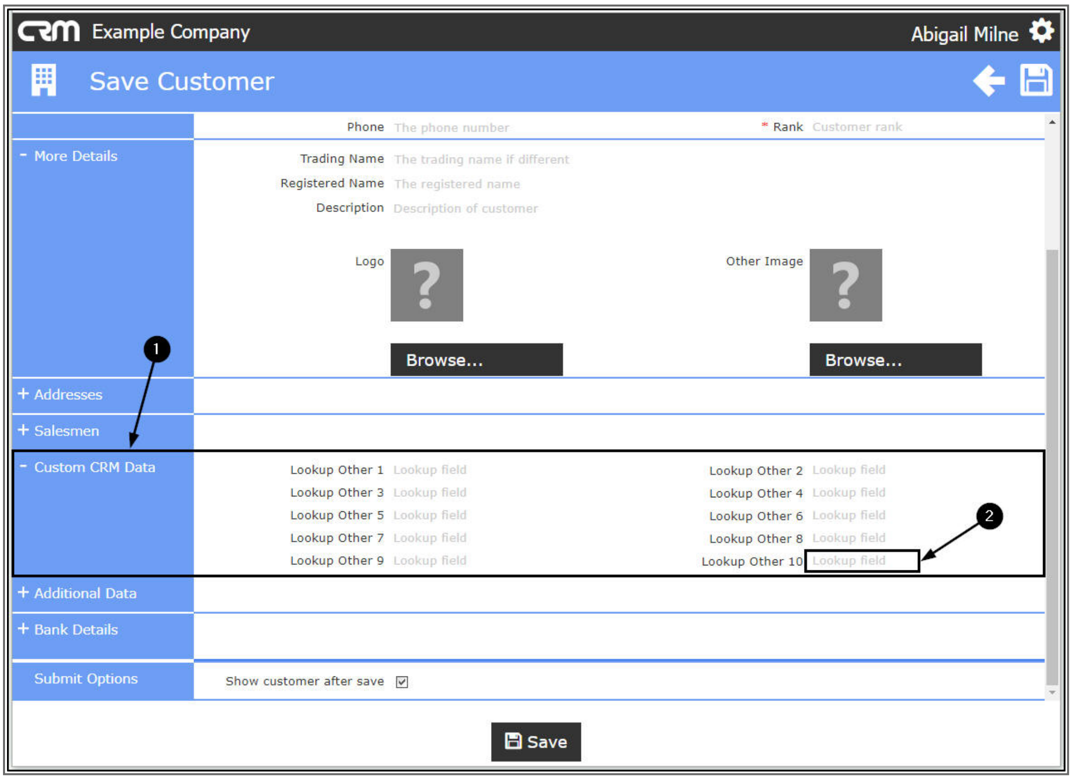


VIEW THE NEW CUSTOM DATA FIELD IN CRM

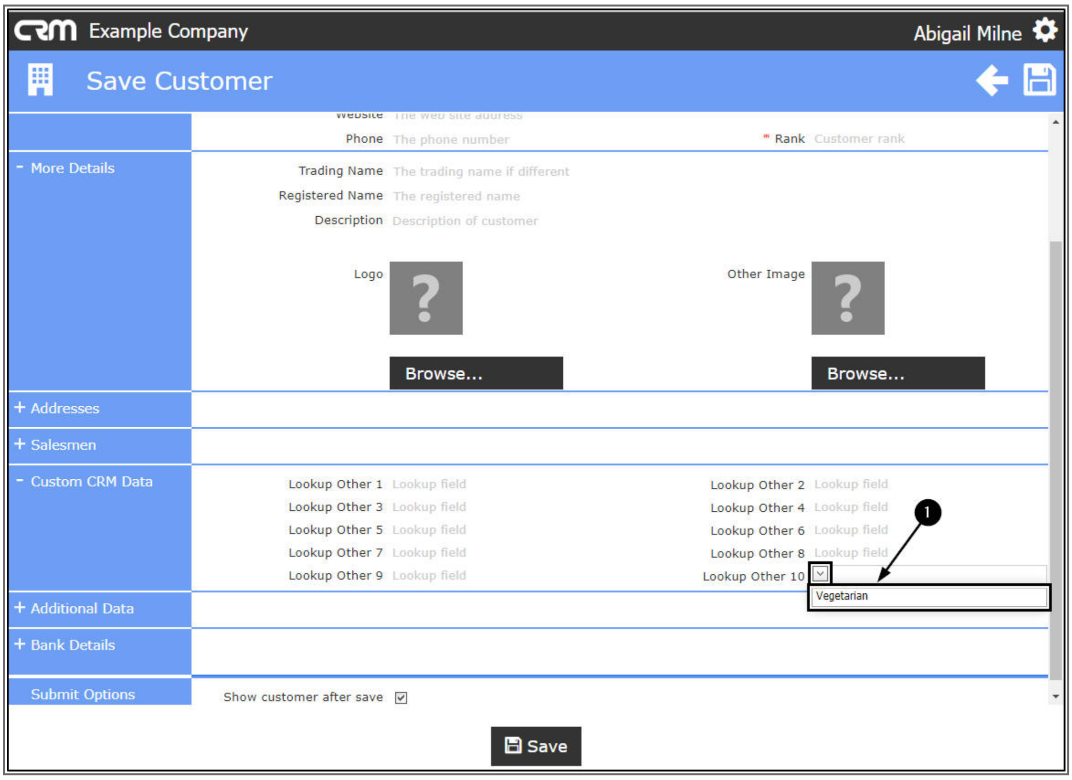
Ribbon Access: *Dashboard > Add New Items > Customer tile > Save Customer screen > More Details frame > Custom CRM Data frame*

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.



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


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
Other Image
Browse...
Browse...
Addresses
Salesmen
Custom CRM Data
Lookup Other 1
Lookup Other 2
Lookup Other 3
Lookup Other 4
Lookup Other 5
Lookup Other 6
Lookup Other 7
Lookup Other 8
Lookup Other 9
Lookup Other 10
Lookup field
1
Vegetarian
Additional Data
Bank Details
Submit Options
Show customer after save
Save

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