New System Tips

Welcome to your new OpenCRM system!

We hope you're excited to get everything up and running.

Your Project Manager will be in touch soon to help you get your system configured so you can get using it as soon as possible. The next few pages will take you through some of the information they will be asking you for, so you can start thinking about it and putting the files together.

Don't worry if you don't know what some of these questions refer to or if you aren't planning on customising that particular area of the system. These are just a few questions that commonly come up in the first push to get a new system configured.

For all of these configuration options, you can either pass across your requirements to your Project Manager here at OpenCRM or carry out the customisation yourself.

9 Simple Steps ...to get you well on your way.

1 Company Logo	**2** Module Tabs	**3** Custom Fields
4 Custom Picklists	**5** Layouts	**6** Custom Views
7 Email Templates	**8** Security	**9** Data Imports

1. Company Logo

You can add your own logo to your OpenCRM system, it will appear in the left sidebar of your screen.

There is a handy FAQ that will walk you through doing this yourself, or, if you prefer, your Project Manager can do it for you.

Either way, you will need a .JPG image that has a maximum width of 160 pixels.

JPEG

Max. 160px Width

FAQ

2. Module Tabs

One of the first things you'll see when you sign into OpenCRM is the navigation tabs along the top of the screen. These will allow you to travel between the different modules within OpenCRM. But maybe you don't need all of them?

It is very easy to hide any modules you aren't planning on using, either globally or by user profile. The best thing is that, if you decide to use these in future, you can always re-enable them with just a few clicks.

See this FAQ for how to globally disable modules you don't want at the moment or have a chat with your Project Manager to decide which ones will best suit your business.

FAQ

3. Custom Fields

The most important thing about the configuration of OpenCRM is being able to include as many new fields as you need to hold the information important to your business.

So have a think about the information you want to hold in the system, which will help you decide which fields you need and where those fields need to be.

If you want to have a go at creating your own custom fields, check out the FAQ below.

FAQ

4. Custom Picklists

There are also a number of standard picklists (or dropdowns) where you might want to change the values to suit your business. Think about the terminology you use or where in your process these choices will be most relevant and decide the best way to capture the information you need.

The most commonly customised picklists are:

Leads

- Lead Status/Rating
- Source
- Industry (will map to Company)
- Annual Revenue (will map to Company)
- Number of Employees (will map to Company)

Opportunity

- Type
- Sales Stage (including the % probability for each Stage)
- Any Cost Centres you may want to use

Company

- Type
- Legal Format

Contact

- Contact Type
- Job Title

Miscellaneous

Within Quotes, Sales Orders and Invoices there are a couple of the picklists that need some consideration, these are – Cost Centre and Stage/Status

To find out more about editing picklists yourself, see the FAQ for details:

FAQ

5. Layouts

One of the other big customisation options in OpenCRM is the ability to hide fields you don't need and move all the other fields you do need around to suit your tastes.

Think about what information you want to see every time you view a record and which information is only really needed occasionally, it might be that you collapse a block or even hide it on the "Details" page.

This FAQ will walk you through creating your own Layouts.

FAQ

6. Custom Views

Sometimes you will want to run a search on something a bit more in depth than just finding a single, specific person. In order to set up these more sophisticated searches and save them for future use, we have Custom Views.

Consider what criteria you want to search by, what columns you want to see in the list, and who should have access to this list.

We can help you create Custom Views to get you started, then you can try it out for yourself, just follow the FAQ.

FAQ

7. Email Templates

If you can send through a blank email with the format you would like used on your default master email template, we can duplicate this to ensure whenever you or any member of your team sends an email, it is correctly branded and formatted.

Any future email templates you want to create, can be based off this one so let us help you get this first one just the way you want it.

FAQ

8. Security

Your Users

Once you've got your system looking just the way you want it, why not invite your employees to start having a look around?

You can either add these users yourself or just send us a CSV list for us to import. All we need is the First and Last names and their email address. We can either email your users with their login details or you can let them know at a later date.

FAQ

Security Guidelines

You might not want all of your users to be able to see every module or even every field in your new CRM system. One of the things your Project Manager will want to discuss with you is how much access you want certain users to have and what kind of sharing options you want to set up.

Read through this FAQ to get an idea of what OpenCRM can do in terms of permissions and security, then have a chat with your Project Manager. They will work with you to make sure you find a solution that works with the way you want things setup.

FAQ

9. Data Imports

Your system is set up and your users are ready to get started, now all you need is to bring your data into the system.

We have a few FAQs that will help you format and clean your data before the big import.

If you can have a sample of your data ready to send to your Project Manager, they will be able to advise you of the best way to bring it into OpenCRM.

FAQ Adding a leading zero to a column, e.g. phone numbers.

FAQ Split one field into two seperate columns, e.g. first/lastname

FAQ Concatenate (join) two cell values in Excel.

FAQ Date formatting from Excel (CSV) into OpenCRM.

FAQ Vlookup (copying values from one Excel sheet to another).

The more information you can have ready for your Project Manager, the faster you will be able to get up and running.

If you aren't sure of any of the questions, though, just ask. They will be more than happy to explain.

Our goal is to get your OpenCRM system set up so that it works for you and how you do business.

open crm