OpenCRM
Admin User Manual

opencrm

Adding value to your business.

Before you get started...

We've tried to organise this Admin User Manual in a logical way that will suit the majority of our customers. We've started with walking you through setting up your users, then gone on to customising your system, and finishing with getting your data imported.

This process is not set in stone though. If you'd rather get your system fully customised before adding your users, that is fine with us.

The first time you log into your new system, you will be greeted with a set-up wizard. This will walk you through adding some basic company information, including adding your address and logo.

Don't forget, if you run into any problems or have any questions that you don't find the answers to in this document, have a look through our Knowledgebase library or drop our support team a line.

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New Crew Arrival

The first thing we typically recommend when people first get their new system is to set up some permissions and add their users. This doesn't mean that these users will get automatic access to the system however, they don't get that until you send them their login details.

What is does, however, is get people started thinking about how they want to use their system.

They start to think about the different areas of the system their various teams need access to and how those users will need to navigate around the system.

Once people get used to thinking about how their users will use the system, then they can start making the customisation changes that come next.

Profiles and Roles

Before we look at how to do this, it is important to understand the logic and hierarchy of the associations required.

- All Users are associated with a **ROLE** - this is done by editing the User Account and setting the Role from a drop down menu.
- All roles are associated with a **PROFILE** – you can select the associated Profile from a drop down menu when you click to edit a Role
  - Profiles are where standard permissions are set. It is here where you will decide what modules your users will have access to and set what kind of access they can have.
  - Users are assigned a Role. They will therefore adopt any permissions associated with that Role via the Profile.

To create/edit Profiles and Roles
1. Go into the **Settings**
   a. To get to Settings, click your name in the top right corner
   b. This will open a dropdown menu
   c. One of the options here will be Settings
2. Select **Profile**
   a. Choose which Profile you'd like to edit or create a new one
   b. From this screen, you'll be able to set up the permissions required – the next two sections will walk you through some of these options.
3. When you've finished, click Save and then go back to Settings
4. Now select the **Roles** option
   a. Pick which Role you'd like to associate with your Profile
   b. Or create a new one
   c. Now you will be able to set the association between a Role and a Profile
5. Now, when you create your Users, you can select the appropriate Role for them.

Module Access

If you would like to restrict some but not all of your users' access to particular modules, you can change this at the profile level.

You will need to change module access at the profile level:

1. Go to Settings -> Go to User Management Block -> Click Profile
2. Now choose which Profile you need to edit and click Edit
3. There are five options for each module:
   a. Allow - Ticking this box will give your users access to the module as a whole. Unticking it will remove it from the tabs along the top of the screen.
   b. Create/Edit - Ticking this box will allow the users to create or edit a new record for this module.
   c. Delete - Ticking this box will allow users to delete one or more records for this module.
   d. View - Ticking this box will allow your users to see this module in the top tabs even if they do not have access to it. For example, if the View is ticked, but Allow is unticked, the user(s) could see the module in the top tabs, but wouldn't be able to access the module at all.
   e. Merge - Ticking this box will let users merge two records in this module.
4. You can also restrict your users' ability to import or export one or more records.

Default Organisation Sharing Access

This option will allow you to set how records in each individual module are shared among your users. You can refine this further if needs be by editing individual user's access or individual records' security.

1. Go to Settings
2. Click Default Organisation Sharing Access and select Edit Permissions
3. Use the dropdown menu under the Access Privilege head to choose how you want sharing to work in each module.
   a. "Public" refers to the assigned to user and anyone else in one of their teams (see below for info on Groups and Teams)
   b. "Global" refers to all users in your OpenCRM system
4. Once you are happy with your sharing access, click Save Permissions – Remember you can always go back and edit this on a later date.

If you have set a Profile to not be able to access a particular module, setting this **does not** override that setting.

Field Access and Customise Search Screens

This section goes over limiting which fields are visible to different groups of users. You can also choose which fields are used in the Basic and Advanced search.

To hide or restrict access to fields on specific user profiles:

1. Go to Settings and look under the User Management block
2. Select Field Accessibility & Customise Search Screens and choose the correct module you would like to edit
3. Select the Profile you would like to edit
4. There are five options for each field:
   a. Visible - Unticking this box will hide this field on every record in this module completely from this user.
   b. Editable - Unticking this box will prevent a user from editing this field. If you have marked the field as visible, but no editable, they will be able to see the information, but not change it.
   c. Basic Search - Any field with this box ticked will be included in the basic search on the main module page.
   d. Advanced Search - Any field with this box ticketed will show up in the advanced search on the main module page.
   e. Mobile – Unticking this will stop this field appearing on the mobile app for any users with this Profile.
5. Click Update

Quick note: If you are planning to set up any custom fields, it might be worth skipping this configuration until you have set up those fields. It will save you having to come back and do the same for your new fields.

Default Organisation Fields Access

This option will allow you to restrict access to individual fields in each module for all your users. If you want to set this by Profile, just skip over this section and move onto Field Access and Customise Search Screens

1. Go to Settings
2. Click Default Organisation Fields Access
3. Choose which module you would like to edit
4. Click Update

Group/Team

The Groups and Teams feature in OpenCRM can help you manage which records your users can see. A Group is just a collection of two or more Teams.

Creating and Managing Teams and Groups

1. Go to Settings
2. Click Teams &Groups
3. Click Create New Team or Create New Group
4. Add a name and description
5. Click Save
6. Once you've created your Team or Group, click the name to get back into it.
7. From this window you can add and removes users from a Team or Group. You can also do this from an individual User record.
   a. If you are in a Group, you can also add and remove Teams by clicking on the tab Teams at the top.

Adding New Users

Now you have your Roles and Profiles set up, you can start adding some Users.

1. Go to Settings -> User Management -> Users
2. Click New User
   a. Enter all appropriate information for that user, including setting up their username, Role, and Group/Team membership.
   b. Once you have filled in all necessary information, click **Save**.
   c. When you're ready to send them their login details, you can set the password for the user by clicking the **Change Password** button on their user record.
   d. Tick the **Email to User** option to send them their password.
3. Once you've created one user, it might be easier to duplicate this record to create the other members of their team. This way you don't have to re-set assign Roles, Groups, Teams, Permissions, etc.
   a. Once you've saved, just click **Duplicate**
   b. Change the details and click **Save**

- Giving access to the mobile access is done at the individual user level. If this is something you would like to set up, please have a read through of this FAQ.
- If you want to amend an Existing Users details, click the User name in the grid and then select **Edit.**
- To track sales commission through OpenCRM have a look at this FAQ

Link to the Personnel Module

Should you choose to use the personnel module, you can link your users directly to their personnel record using a simple drop down menu on the personnel record.

Note that in order to do this, you will first need to create a record in the Personnel module, the is done in the same way as you would create a Contact.

To track holiday entitlement:

1. Go to the Personnel module and select a record. Click Edit.
2. Add the number of days allowed to each employee in the Holiday Days field.
3. Click Save
4. Go to Settings -> Additional Settings -> Holiday
5. Set the values for the start date for the Holiday Year period (this is when your Holiday year runs from). This is used to calculate the number of days that have been used within the annual holiday period.
    a) The number of days selected is translated and held within OpenCRM as a number of hours. This means that if your work day is set as being 8 hours (and not an "All Day Event), to create a full day's holiday, you would create a new Holiday activity with a duration of 8 hours. For a half-day's holiday you would do the same but set the holiday duration as being 4 hours.
6. Click Save.

*   When a Holiday activity is created on the system and linked to a specific Personnel record for an employee, the duration is used to calculate the number of hours already booked which in turn is subtracted from the Holiday entitlement and therefore displays in the Holiday Remaining field.
    *   There is a setting that turns on Holiday Reminders which when set notifies specified users whenever the Holiday remaining figures drops below a certain figure, which is set by default at Zero. So when a Holiday is booked for an employee that has no remaining (or insufficient remaining) Holiday left then you can be notified automatically.
*   There are also four pre-formatted reports that come standard with your OpenCRM system: Holiday due next 30 days. Holiday due next 90 days, Sickness last 30 days, and Sickness last 90 days.

Exploring the Control Panel

OpenCRM was designed and developed to be a system that could and would fit the business needs of any size or type of company. As such, there may be a number of fields, features, or functions that you either need but don't see or don't need but do see.

This section will walk you through some of the basic ways you can customise your OpenCRM system.

If there's something that you'd like to do that isn't included here, have a look through our Knowledgebase articles or give your Project or Account Manager a shout, they'll work with you to make sure your system fits your needs.

Screen Design

You can customise the layout of each of the modules in OpenCRM from the Screen Designer.

1. Go to the Studio block on the Settings page
2. Click Screen Design
3. Select the module you want to modify.
4. You will see a screen with all of the fields available to that particular module are listed. They may not match the actual layout of the blocks on the screen
5. You have a number of options for each field:
    a. Sequence - This allows you to set the order in which fields appear within the current block
    b. Block - allows you to move a field from one block to another
    c. Mandatory - When ticked the field must be completed and users will be unable to save a record without making an entry in the field.
6. You do not need to click the **Update** button on each block you edit simply clicking it anywhere on screen will save all of the changes you have made across all blocks.

Existing Fields

If you need to change the contents of a picklist (drop down menu):

1. Go to the Studio block in Settings
2. Click Picklist Settings and select the appropriate module
3. You will now be able to see the fields that you can edit. Click the Edit button next to the field you would like to change.
4. Type in the new values you would like to add. Make sure each value is on its own line.
    a. The top value will be the default value. If you do not want any value as the default add "--Please Select--" or "--None--" as the first value.
    b. If you have set a picklist as a mandatory field, the above values will not register as the field being populated.
5. Click Save

Note: It is not possible to edit the name or type of an existing field within your OpenCRM. In some cases, our Support team can make minor changes, but there are a number of fields that cannot be changed in any way. If you have an existing field that you would like to alter, contact your Project Manager or our Support team to see if this is possible.

Custom Fields

As well as the standard fields in the modules of OpenCRM, you are able to add custom fields. There are a number of different types of custom field so that you can find the best match for your data.

If you have set up any restrictions on which fields your users have access to, you will need to go back and edit this Field Level Access for any custom fields you add.

Note: If you want your new field to only appear when another condition is met, you will need to create that condition before creating the field. See the next section.

To add a new field:

1. Click Settings and look within the Studio block
2. Click Custom Field Settings and select the module where you want to add your new field.
3. Click New Custom Field and select the type you want to use.
    a. You can find a list of the various types and what they do in this FAQ.
4. Give your new field a name and add any settings.

Creating Conditions

If you want to have the new field you are creating be dependent on a condition, either for it to appear OR for it to be mandatory, you must set up the Condition **before** you create the custom field. To set up a condition:

1. Click **Settings**
2. Go to Studio Block
3. You have two options
    a. If you want to set a condition that determines whether a field APPEARS, click **Custom Field Conditions**
        i. Click the **New Type** button
        ii. Go to Step 4
    b. If you want to set a condition that determines whether a field is MANDATORY, click **Custom Field Mandatory Conditions**
4. Select the Module to get a list of fields you can use
5. Enter a Type Name - This is the name that appears in the Condition drop-down when creating custom fields
6. Select the field you want the condition to be based on
7. Enter the value the field needs to be for the condition to be met. Please note that this is case sensitive
8. **Save** the custom field type
9. Now you can create your new, custom field.

Communication Templates

Depending on how you're planning to use your new OpenCRM system, there are a variety of templates you can use to make sure all of the communication that comes out of your system looks and sounds right for your business.

Email Templates

To create a new email template:
1. Go to the Communication Templates block in Settings
2. Click Email Templates
3. Click New Template
4. Select the folder where you would like to store this template
   a. You can create additional folders by editing the "Templates" picklist (Settings->Studio->Picklist Settings)
5. Give your new template a name and description
   a. You can also set the template to always appear to have been sent by a particular name and/or email address.
6. Add a subject line
   a. You can also add an attachment from your Documents module to always attach to this specific template
7. Type and format your email template.
   a. To access the full HTML editor, simply click on the small arrow in the top right corner of the body block.
   b. If you would like any fields to be merged from the Contact, Lead, or User records, use the drop down list at the top of the page to select and add these fields. Simply select the field and copy and paste into the body of the template.
8. Click Save

Default Templates

If you would like to set a default template to appear whenever you or any of your users click to email:
1. Navigate to the email template you would like to use as your default.
2. In the URL of the template, you will find the Template ID. Copy this number.
3. Go to Settings > Configuration block
4. Scroll to the bottom and select Additional Settings
5. Click on the Email option on the Settings menu
6. You can now click the "Email Settings" link in the grey bar
7. Add the Template ID to the value box next to Default Email Template.
   a. You can use this same process to set the default template used for Quotes, Orders, and Invoices by going to Settings -> Additional Settings -> Invoice Email
8. Scroll to the top or bottom of the page and click Save

Signatures

There are two different ways to create signatures in OpenCRM:

1. By User
    a. Go to Settings -> User Management -> Users and select the user you would like to edit
        i. Your users can also edit this by going to My Account and clicking edit
    b. Scroll down to User Information
    c. Add the signature into the HTML editor
    d. Click Save
    e. You will need to add the merge variable $users_signature into any email or email template to insert it
2. General
    a. Go to the email template where you would like to add the signature
    b. Copy the appropriate merge variables from the drop down at the top of the page and paste them into the bottom of your email.
    c. Click Save

SMS Templates

SMS templates are created using the same steps as an email template. The only difference is that you will need to click the "SMS template" on the right side of the folder select option.

Keep in mind the length of the template if you are creating SMS Templates. A template with more than 160 characters will use two (or more) credits.

Living and Working in the System

You've got the system set up just how you want it, your users are all set up and ready to go, it's just missing one thing. Data.

This section will walk you through importing any existing data you might have, as well as setting up some key admin reports and templates to make sure you get the best start with your new OpenCRM system.

Once you've had a chance to get your data in and got your reports and templates all set up, there's nothing standing between you and using your new system.

Processing Personal Data

Following the introduction of GDPR in May 2018, the way we all interact with personal data has changed dramatically.

There are a number of tools in OpenCRM that are there to help you manage these requirements. You can read more about them on our GDPR home page.

Importing Your Data

Before you import any data, there are a couple things to keep in mind.

- To import data into OpenCRM you will need to have the import data in a compatible format. This is easy to do using a spreadsheet program, such as Microsoft Excel or OpenOffice, normally saving the file format as a CSV file. This is a common file type that is easy to manage and import.
- Although OpenCRM has powerful de-duplication tools, we do recommend that our customers have a quick scan through their data before they import it to check for duplicates, missing information, and/or incomplete records. It will save you time in the long run and make your data import go that much smoother.

To import data:

1. Go to the module that you wish to import into.
   a. Decide ahead of time what the most appropriate module is for your data, if you are importing Contact Data, then go to the Contacts module, similarly with Company Data, this should be done through the Company module.
   b. If you are unsure of whether to import your data into Leads or Companies and Contacts, the best thing to do would be to call your Account Manager for a quick chat to decide which option best meets your needs.
2. Below the grid of records, you should see the option to **import**
3. Follow the steps on screen, which include:
   a. Select the Type of file to import
      i. If it is a CSV file select **CUSTOM** - Click **NEXT**
   b. Select the (CSV) file to import using the **BROWSE** button
   c. Does the data have a header? Note: Has Header means that the spreadsheets first row contained the data describing the columns details. This row is displayed to help with the field mapping, but not imported.
   d. Click **NEXT**.
4. Map the fields: The next screen contains two columns, the left column allows you to select the OpenCRM Field that you are going to import into, the right column displays a sample of the data that is due to be imported.
5. When you have completed the field mapping, click the **IMPORT NOW** button to start the data import.

a. Note: Save as Custom Mapping - this allows you to see the field mapping that you have set up in case you need to use the same structure again. This is particularly useful where you purchase data from a broker or are supplied data in a common format, where the column position and the associated OpenCRM fields remain the constant. This speeds up the import process as you can select a previously saved the Profile.

b. If you have set up Custom Mapping and want other users to use your mapping, you need to publish what you have mapped otherwise they will not be able to access your Mapping. When the Mapping is visible to others you will see the "un-publish" option.

Custom Views

Custom views are a way of filtering data using detailed criteria and are below the search box within each of the modules.

To create a view:

1. Click on **Create View**
2. Give the view a name
3. Choose the columns you would like to see
4. Select the appropriate filters
   a. There are some pre-set Standard Filters i.e. created time, current week
   b. There are also more Advanced Filters that you can use to tailor the view to a specific portion of your data.
5. Set the permissions:
   a. Set the users who you wish to have access to this view. If you do not do this for your own user prior to saving the view only the system administrator will be able to access it.
   b. You can also select any user that you wish to have this view as their default view.
      i. Caution – Custom views act as data filters and will limit the search on the entity home page, please use with care.

Key Metrics

In addition to using views to generate lists of records, you can also use them to generate counts of records. For example, you might not be interested in exactly which Leads have been contacted over the past week, but you might want to know how many Leads have been contacted by your sales team over the past week.

To set up key metrics:

1. Create a view using the steps above, but make sure to tick the "List in metrics" box.
2. Go to My Account -> Homepage Components
   a. If you want this to list on your users' homepage, they will also have to follow these steps or you can go to the User Management block in Settings. Click Users and select the appropriate user and click Homepage Components
3. Drag the Key Metrics element to the upper list if it is not already there.
4. Click Update

Creating Reports

Some things you need to know before you start

- Identify the primary module containing the data you are interested in, as well as the secondary module (if needed) before starting. If you start in the wrong module, you will need to start from scratch again.
- You also need to consider how much data you wish to feature in the report. You can do this by using filters. A report showing ALL Leads is likely be too big to be of any use, but one showing new leads from the last 7 days is probably more useful.

Creating a Report

1. Go to the Reports module and select New Report
2. Select the Module(s) that you want in the Report and click on Continue.
3. You are now on the screen where you can set the parameters for your report:
   a. First select which type of report: Tabular or Summary
      i. A summary report will generate subtotals for your data.
   b. Select which columns you want to show on the report.
      i. You can select fields from the left box and move them into the right. This chooses which columns will appear in your Report
   c. [Optional] If you are carrying out a Summary report, you will want to decide on the grouping of your data. The subtotals mentioned above will be generated using the first grouping.
   d. [Optional] Choose columns to total
      i. You the Sum, Average, Lowest Value, and Largest Value given for numerical or currency data.
   e. Specify the criteria/filters
      i. These work the same way as when creating Custom Views
   f. Schedule the Report

       i. You can also choose to run this Report at a pre-set interval, for example, once a month.

      ii. You can schedule the report to be sent to Users or Contacts.

  g. [Optional] Specify a graph

       i. If your data can be represented as a graph you can choose from a number of different types

      ii. If your data cannot be represented as a graph, you will see an error message

  h. Home page settings

       i. You can set the report to show up on your homepage. Simply set the report and then drag and drop the corresponding number report the same way you did in the Key Metrics.

  i. Set the permissions

       i. If you want this report to only be visible be certain users or groups, you can set those permissions here.

4. You now have the finished report, which you can export as a PDF, Excel or CSV file.

  a. To export the file with a title other that 'Reports' you can add a title in the field 'Additional Name'

Additional Communication Templates

In addition to the email templates available in the system, there are also a number of other templates available to you.

PDF Templates

You can create PDFs for a number of different modules within OpenCRM:

1. Go to Settings and find the Communication Templates block
2. Choose PDF Templates
3. Hover over the dropdown menu to select the module for the template you would like to create.
  a. You can also select an existing template and duplicate it. It is sometimes easier to adjust the formatting of an existing template than to create one from scratch.
4. Sales PDFs (Quotes, Orders, Invoices)
  a. Give your template a name and description
  b. Set the margins for the header and footer.
  c. Use the fields and tick boxes to format your product grid
  d. Format the header(s) using the merge variables from the drop down menu at the top of the page.
  e. Drag and drop the fields you would like displayed in the product grid from the Available Columns section to the Current Columns
  f. Set the width of the different columns by percentage of the total page width
  g. Format the footer(s) using the merge variables from the drop down menu at the top of the page.
  h. Click Save

5. Other PDFs
    a. Give your template a name and description
    b. Format the header(s) using the merge variables from the drop down menu at the top of the page.
    c. Additional Grid settings:
        i.   In addition to the Product Grid on Sales PDFs, you can set Invoice Grids (on Company PDFs) and Activity Grids (on Project PDFs)
        ii. These are set up very similar to the Products Grids above, but have the additional option of filtering which Invoices and Activities are included
        iii. The filters use the same controls as those in Custom Views and Reports.
    d. Click Save
6. Supplementary Page
    a. If you would like a page to be upended to your PDF documents, a T&Cs page, for example, click New Supplementary Page
    b. Add a name and description
    c. Format the content of the supplementary page(s)
        i.   To access the full HTML editor, click the small arrow in the top right corner of the text box.
    d. Click Save.

Mail Merge Templates

If you are interested in using a Word (or similar) document within OpenCRM, the only thing you really need to do with the document is add any merge variables you would like to use. Then:

1. Save the file as DOCX, RTF, or ODT.
2. Go to Settings and find the Communication Templates block
3. Choose Mail Merge Templates and select New Template from the Actions menu
4. Select which module you want to associate the template with, select a folder, and give it a description.
5. Now you simply need to choose the file and click Upload File.
6. You can now start using your Mail Merge Document.
    a. We do recommend that you test the document a few times to make sure the formatting doesn't change with merge variables of different length. For example, the name "Smith" may fit within the space you've added for surname but "Anderson-Harrington" might cause a line break.
7. See this FAQ for a list of the available merge variables for Mail Merge Templates.

So that was your whirlwind tour!

We know it's a lot to take in and that you might not feel completely confident right away. That's why we've got a library of Knowledgebase articles just waiting to be read and a team of support gurus ready to jump in and help.

All you have to do whistle!

...although we'd probably hear you better over the phone or in an email.

The bottom line is that we're here for you.

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We're here if you need us.

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