OpenCRM Version 4 User Manual

opencrm

Adding value to your business.

Contents

Preparing for a Voyage of Discovery

Now you've got OpenCRM, what are you going to do with it?

This manual is here to help familiarise you with the basics of your new OpenCRM system. It will walk you through your first steps for using the system and then take you on an overview of each module.

Once you've got to grip with the basics, you can find the answers to your more detailed and specific questions in our KnowledgeBase library. To access our Knowledgebase, click on your name in the top right of the system, this will open a dropdown menu with an option for "FAQs."

If you don't find the solution, drop our support team a call or email. They're always ready to help.

Let's get started!

Logging In

1. Start the Web browser and connect to your OpenCRM server
   (For example: http://companyname.opencrm.co.uk).
   a. You can use any web browser you chose, but we suggest using Google Chrome.
2. In the Log in page, enter your user name and password in User Name and Password fields respectively.
3. Select the language from the Language pick list. The default is English, and French or German versions also available
4. Click the Login button.

Logging Out

Simply click your name in the top right corner of the system and choose Logout.

Password

After logging in the first time, you may want to change your password for better security.

To change password

1. In the OpenCRM Home page, click the My Account hyperlink available from the dropdown menu in the top right of the system. You can access this by clicking on your name.
2. On your User page, click the Change Password button.
3. In the Change Password pop-up window, enter the new password and click Save.
   a. You can also click the dice icon for a randomly generate password.
   b. You can also click the Email to User function which will send the User their password. This is useful if you are a system admin setting up other users or resetting their passwords.
4. Log out from OpenCRM and log in again with the new password.

Forgotten Password or accidentally Locked Out?

By default you have three attempts at logging in before your account is locked for security reasons. Bear in mind that both Username and Password are Case Sensitive.

If you have accidentally locked yourself out or have forgotten your log in details, at the bottom of the log-in page there is a link to click. This will take you to a screen where you can enter your username or email address to request a password reset.

Vocabulary

Whenever you start up a new piece of software, you need to learn the names of the various features, functions, and screens. Here is a list of some of the common words

and phrases you will find both throughout this user manual and in any conversation with the team at OpenCRM:

- Module – The modules in OpenCRM are the various areas of your new system. They include Leads, Contacts, Companies, Opportunities, Quotes, etc.
- Module home – When you click into a module, you will see a screen that shows a search box and a list of the information held in that module. This is the module home.
- View – Views in OpenCRM are pre-saved searches. You can find them in each module home as a dropdown list at the top of your list of records.
- Record – A record is an individual file in the system. For example, a Lead record is the person who you are trying to sell your product to, while a Quote record is the pricing information you are sending to them as a PDF.
- Consult view/screen – When you click on a record, you will be viewing on the consult screen. From this screen (or view), you will be able to send emails, create activities, notify your colleagues, etc.
- Edit view/screen – When you click to edit a record, this is called the edit screen.

Navigating

To navigate between the various modules, click the "Jump to" menu from the green sidebar. This will give you a list of the various modules you can access.

Within each module home page, there are five main sections of the screen:

1. Search box: This is where you can perform basic and advanced searches.
2. Views/Navigation: This is where you can select and create/edit your custom views. You can also scroll between multiple results pages and select how many records you want visible on your screen.
3. Action Menu: A series of options that allow you to carry out specific actions with selected records.
4. Results: A grid of the records that match the currently selected search, view, or tab.
5. Update: By selecting one or more records, you will have the option to use the "Update" at the bottom of the screen to change the values in individual fields for more than one record at a time. This option is not available on all modules.

Common Actions

This is a list of actions that are commonly found across the system and what they do. Please not that not all of these actions are available in all modules.

Module Home

- New ___: This opens up a new record for the module you are currently in.
- Delete: This will delete the selected record. See below for guidance on using this button.
- Email: This will open a blank email with the email address(es) of the record(s) you have selected pre-populated in the "To" field.

- Merge: This will combine the two records you have selected.
- Activity: This will create a new activity for the record(s) you have selected.
- Mail Merge: This will create a mail merge document for the record(s) you have selected. You will be able to select which document you would like to use after clicking the button.
- Show Map: This will display the address of the selected record(s) on a map (if the mapping function has been enabled).

Record Edit

- Apply: This will record and save amendments but leave you on the Edit screen.
- Save: This will record and save amendments and take you out of the Edit screen.
- Cancel: This will cancel out any amendments you have made. You will receive a pop-up message to confirm you wish to cancel the current operation before being returned to the screen.

Record View

- Duplicate: This will create a duplicate record and open it in edit mode.
- Export to PDF: This will incorporate pre-defined information from the record onto a pre-formatted PDF template that will download to your local machine. It is not available in all modules.
- Email PDF: This will do the same as the above, but attach that PDF to an email that has the linked email address of the record in the "To" field. It is not available in all modules.
- Notify: This will send a notification about this record to any of your users.
- Call > (Meeting, Task): This will create an activity of the type selected.
- New Opportunity > (Quote, Invoice, Sales Order): This will create the type of selected entity using information from the record you are currently viewing.
- Change Coordinates: This allows you to add/change the Longitude and Latitude of a particular record.

Searching

There are a number of ways of searching your OpenCRM system:

1. Global search: This is located at the top of the screen. It will search the following modules: Company, Contacts, Opportunities, Sales Order, Leads, Projects, Quotes and HelpDesk. It is worth keeping in mind that this is a string search, so it will search a variety of fields so if you enter only a few letters, the search may take time and return more results than are easily scanned.
2. Keyword search: This is located at the top of every module home page. Entering a search term here will search for matches in selected fields.
3. Basic search: This is displayed when you click the + icon to the right side of the Keyword Search section. You can enter as much or as little information as you have in the fields available.

4. Advanced search: To access the Advanced Search, first expand the Basic Search and click the arrow on the right hand side. This will allow you to view a wider range of fields from which to conduct your search.
5. Views: These are pre-saved searches that can be accessed using the drop down menu above the module results grid.
6. Alphabetical/Manual: There is always the option of carrying out a manual search, by clicking the header of a column within the module home view. This will order the current view alphabetically by that column and you can then scan the results.

Fields

There are a number of different types of fields, including those that you will be able to populate or edit and also some that you can't.

- Free Text Field: You can type freely in this type of field up to a pre-specified number of characters.
- Number Fields: There are several different types of number field, including simple number, percent, currency, and multi-currency.
- Date: These fields will have an icon next to them that allow you to select the appropriate date from an interactive calendar.
- Email: This type of field will allow you to click an icon next to the field and populate an email "To" field.
- URL: This type of field will automatically have http:// written in front and will work as an external link to the address.
- Phone: These fields will have an icon next to them that will access your VOIP Phone and dial. This will need to be set up by an administrator.
- Drop Down: These fields will allow you to select one of many options from a drop down list. Some of these will have an icon next to it that will allow you to edit the fields within the list.
- Tick Boxes: These fields will include one or more tick boxes for you to select.
- Large Text Fields: These will be areas in which you can write a large amount of text. Some may have a small arrow on the top hand side of them that opens up a full HTML editor.
- Pop-up: These fields, when clicked on, will have a pop-up box from which you can select a number of values.
- Selector: These fields will have an icon next to them that allows you to select an entity from another module to link to your current record.

Mandatory Fields

Some fields in OpenCRM are mandatory. You will not be able to create a record if you leave this field empty.

These fields are denoted with a red asterisk before the field title.

Notify

When you are viewing a particular record in any of the modules you will see a button labelled Notify in the menu above the record (or the option "Notify" in the Action menu).

This action enables you to send a notification about this record to any of the users in your system. This can be useful for example letting a colleague know that a particular contact has called, or to alert someone of a newly created Opportunity.

To use the Notify button

1. Click the relevant Module Tab to access the module containing the record you wish to issue a notification about.
2. Click on the record itself to open the record details.
3. Click on the Notify button
4. This opens a pop-up window where you can select any user from the system.
   a. You will need to add OpenCRM to you list of trusted sites within your browser.
5. Select the Users you wish to notify highlighting their name in the menu on the left and clicking the relevant arrow to put their name into the right hand side. Do this for however many users you wish to notify then click Save. This closes the pop-up menu.
6. You will now be able to type your message into an email. You can use an E-mail Template if you wish to do so.
7. Clicking on Send will send the notification and will return you to the screen of the record.

Note that you can also use Workflow to automate notifications

Deleting/Merging Records

Occasionally, you may need to remove some unnecessary records from the OpenCRM system. You have two options, you can either merge two records or delete the unnecessary record.

Warning: Deleting records is a destructive operation, so use this option with caution. Before deleting a record, you will want to consider which other records are linked to the one you wish to delete.

To merge records:

1. Select the two duplicate records
2. Choose Merge from the Action menu
3. The system will ask you which of the two records you would like to be the primary record
   a. This will be the record that you will see in the future, merging will only copy over the linked entities, not information within the body of the record itself
4. Click Merge

To delete records:

1. From the home page
    a. Tick the box of the record you use to delete
    b. Choose "Delete" from the Action menu
2. From the individual record
    a. Select "Delete" from the Action menu

With both, you will see a pop-up asking if you are sure you wish to delete. Click OK if you are.

Recycle Bin

If you have access to the Settings area of the system, you can recover deleted items using the Recycle Bin feature.

Finding Related Records

One of the key strengths of the system is how your data ties together. From a Contact record you have easy visibility of linked records, for examples the Company that person works for, any Tickets they have raised, Projects they are linked to and so on.

You can find this linked information in a couple of places:

1. In the Sub-Tabs: These are the list of tabs you'll find at the bottom of each record. For example from a Contact record, you can access any linked Companies, other Contacts, Contracts, Pending and Historic Activities, Emails, Documents, Opportunities, Tickets and so on. Click on the relevant sub-tab to view a list of the records contained, and you can then click to view the record itself
2. Timeline: This is a more dynamic way of viewing the most recent interactions with a given record. You can open the Timeline by clicking the **<<** icon on the right-hand side of a record, and this will list the latest Activities, Tickets, Opportunities etc. linked to a record. You also have filtering options so you can choose to display certain types of record and exclude others. Clicking the pin icon at the top of the Heartbeat will pin this Timeline to the side of the record, and clicking **>>** will minimise the Timeline.
3. Heartbeat: this appears just above the Timeline and gives you a quick snapshot of key data relating to that record.

Stand Out from the Crowd

OpenCRM is a system designed to work for anybody, but we know that not everybody works the same way, even in the same company.

That's why we've designed OpenCRM to give users the ability to customise and personalise certain aspects of the system. This gives them the tools they need to reach their maximum potential in a digital environment that suits their personality.

All of the customisation options in this section are available to all users of OpenCRM, not just system admins.

If you are a system admin and want to go even further to customising your system, why don't you have a look at what options are available in the Admin User Manual?

Changing Your Dashboard

The Dashboard shows data relevant to each User and their Group or Team. This can include data such as Current Open Opportunities, Activities, Invoices Due, and so on.

To select and rearrange information on the Home screen:

1. Go to My Account from the dropdown in the top right of your screen
2. Click the Homepage Components button.
3. You can now drag and drop the information you want on your home screen. The "Currently selected Widgets" section represents the components you will see and the "Other available Widgets" lists the other components you can use.
4. Click Update System and a pop-up window will appear to confirm your changes have been registered.

If there is a Report you would like to include on your home screen:

1. When you create a Report (see below), tick the box under Home Page Settings called Show on Home Page
2. You will also need to define which Report block you would like to use by selecting one from the dropdown menu Reports Block
3. You can also decide which figures you would like it to show and also which groups/users will have it displayed.
4. You will need to add the selected Report Block to your Home screen using the above steps.

If there is a particular View you would like to include on your home screen:

1. When you create a View, there is a tick box in the View Information block that reads 'List in Metrics'
2. If you tick this box, the information that view generates can be included on people's Home screens.
3. In order to have it included, however, the Key Metrics block will need to be included on their Home screen using the above steps.

Setting Your Landing Page

The landing page is the name for the first page that you see when you login to OpenCRM. It is the Calendar page by default, your administrator may have set this when they created your user account.

If you would like it to be something else:

1. Go to My Account
2. Select Edit
3. Scroll down to Interface Settings
4. Using the dropdown menu next to "Default Module," select the module you would like to see when you first login.
5. Click Save

Changing Your Calendar

1. Go to My Account
2. Select Edit
3. Scroll down to Calendar Settings
4. There are a number of settings:
   a. Calendar default - Set whether you want your Calendar to be daily, weekly, or monthly
   b. Day start hour - What time you want your day to start (24 hour clock)
   c. Day end hour - What time you want your day to end
   d. Filter - If you only want to see certain types of Activities or see all Activities
   e. Status - If you want the completed Activities to remain on your Calendar
   f. Time difference - If you are operating in a different timezone than GMT
   g. Entry background - You can change the colour of the Activity blocks on your Calendar
5. Click Save

Setting your Sidebar Theme

1. Go to My Account
2. Select Edit
3. Scroll down to Interface Settings
4. The last option will be "Sidebar Theme" and you have a number of options:
   a. Green background & White icons
   b. Green background & Black icons
   c. Grey background & White icons
   d. Grey background & Black icons
   e. Green background & Grey icons
   f. Grey background & Green icons
   g. Light Grey background & Green icons
   h. Light Grey background & Black icons

Let's Get to Work

Now that you've got the system looking the way you want it, let's take a look at what you can do with it.

This section will take you through each module, outlining what the module can be used for and then walk you through some basics of how to use it.

We've also included links to some additional KnowledgeBase articles at the end of each section. These will walk you through some of the fancier, more advanced things you can do with each module.

Just a quick note:

Depending on what areas your system admins have decided work best for your business, you may not have access to all of these modules. This is something only your system admin can change, it is not a user-level decision.

Dashboard

What can you use this module for?

This module essentially functions as a place where users can go to see key pieces of information relating to both themselves (and their performance) as well as more general reports. There are a number of pre-programmed reports available and additional reports can be added using the reporting module.

How do I use this module?

This module can be configured by going to the user account (via the top right dropdown menu and select My Account) and then selecting the button Homepage Components. You can now drag and drop the information you want on your home screen.

Move the components from the bottom list ("Other available widgets") into the top list ("Currently selected widgets").

Once you have selected the information you want to appear on the Home screen, simply click Update System.

What else can I do?

- Try adding a report or some key metrics to your Dashboard

Activities

What can you use this module for?

This module can be used to keep track of your to-do list as well as preserve a record of the communications you have had with your leads and contacts.

How do I use this module?

You can create new Activities in a variety of ways, including:

- Direct from the Activities (or Calendar) module and manually link related entities
- Via a record (i.e. Lead, Contact, Project, etc.) screen. This will automatically link the record to the Activity.
- Bulk Activities can also be created by selecting numerous entities within a module and selecting 'Activity' to create single activities for each entity or using 'Bulk Activity' to create a single activity with all entities linked to it.

Populating the information within an Activity:

1. Subject – This is a free text field
2. Date/Time – This will automatically be set as the current date and time.
3. Type – Your options of Call, Task, Meeting, and Note are hard coded.
4. Assigned to – This is a dropdown that will automatically set as the current user.
5. Status – This is a dropdown that allows you to track the progress of the activity.
6. Duration – This is a set of two dropdown menus that allows you to set how long the activity lasted (or is expected to last) in minutes and hours.
7. Description – This is a large text field where you can write a detailed description of the goal and results of the activity.
8. Linked entities – This section gives you the ability to link your activity to another record within the system.
9. Details – including: Category, Priority, Location, Charge time, Deadline, Private, etc.
10. Reminders/Notifications – You can set a notification or reminder to be sent to the owner(s) of any Activity.
11. Security – You can set who can see/edit/delete a particular Activity.
12. Create a Follow up Activity – By selecting a time frame from the dropdown menu on the right side of this block, you can create a follow up activity that will be automatically created with the linked entities from the original activity and a copy of any text in the description field with a date and time stamp.

What else can I do?

- Work through your To-Do list like a pro

- Set up and use Action Plans

Calendar

What can you use this module for?

This module will show you the Activities you have scheduled. You can also view the calendars of other members of your team (depending on your security settings) by using the filter lightbox along the top of the Calendar.

It is also possible to view information relating to ongoing Leads, Opportunities, Quotes, Sales Orders, Invoices, and Purchase Orders via the additional grids directly under the mini calendar on the right side of the screen. You can choose which blocks to view here via your My Account page.

How do I use this module?

Any Activities assigned to you will appear on your Calendar. To view these Activities, you can simply click the link on the Calendar. It is also possible to navigate to certain linked entities, including Lead, Contact, and Company, for those Activities by hovering over them and clicking the hyperlink.

To complete an Activity via the Calendar you can either click through to the Activity, edit it and change the status to 'Done' or you can simply click the 'Not Started' hyperlink that appears when you hover over an Activity. Clicking this link will not open the Activity, but will change the status to 'Done.'

To add a new Activity via the Calendar, you can click on the time you would like the Activity to start and fill out a quick create form.

What else can I do?

- See other record grids on my Calendar

- Navigating the system using the Calendar page

Campaigns

What can you use this module for?

The Campaign module is a way of easily grouping together Contacts, Leads and Companies in order to create a single list from which you can run a marketing Campaign, or simply manage a list of records.

How do I use this module?

1. Creating new Campaigns
    a. If you click "New" you are taken to an Edit screen where you can enter some basic details to describe the Campaign.
    b. The fields are fairly self-explanatory.
2. Using the Campaign
    a. When you first open a Campaign, you are met with the basic information as with all the modules in OpenCRM
    b. There are tabs across the top of the Campaign consult screen that will give you the option to see the Leads, Contacts, and/or Companies linked to this Campaign.
3. Adding Company / Contact / Lead records to the Campaign (3 options)
    a. From the Lead/Contact/Company module
        i. There is an "Add to Campaign" option beneath the list of records or there is a "Bulk Add to Campaign" option at the bottom of the screen.
        ii. You can add a number of records to the campaign in one go, by selecting the items by ticking them in the grid of search results and clicking "Add to Campaign" (or "Bulk Add to Campaign") will add all the records within the view you currently have selected..
    b. From a single Lead/Contact/Company record
        i. On the record detail view, there is an "Add to Campaign" button above the record.
        ii. This will allow you to add this individual record to a campaign.
    c. From a Report, if you have included the Lead or Contact and/ or Company module in a Report
        i. At the bottom at the Report list you will see a button to "Add Leads/ Contacts/ Companies To Campaign".
        ii. This will allow you to add all the relevant record to a Campaign.
    d. Regardless of which option you choose, you will be asked to pick the relevant Campaign.
        i. Simply click the folder on the right and then you can search and choose the campaign to link this record/s to.
        ii. There are a number of additional fields you can populate to make the data and campaign information more useful. Details of this and other Campaigns are now stored on the relevant Lead, Contact and Company record under the Details section.

4. Once you have you records linked to the Campaign, there are a number of functions you can perform:
    a. Bulk email ALL items linked to the campaign
        i. Make sure your template is set up to cater for the different module types!
    b. Bulk email Contacts / Leads / Companies
    c. Bulk Mail Merge all Contacts / Leads / Companies
    d. Bulk Activity all Contacts / Leads / Companies
    e. Remove items from list
5. Tracking the results of a Campaign
    a. From a campaign it is possible to track a wide variety of statistics, listed in this FAQ)
    b. Statistics can be frozen by setting the campaign status to 'Done' or 'Cancelled.'
    c. To set up tracking click-throughs, see this FAQ on how to use the Click-Through Wizard
        i. Important: you must have your customer portal set up in order to track click-throughs. You'll need to contact our support for our team to enable this for you.
    d. Tracking Total value of Opportunities / Quotes / Orders / Invoices generated from a Campaign
        i. When creating a new Opportunity / Quote / Order / Invoice, if you link the campaign to the new item (there is a field for Campaign on the edit screen in the Additional Information block), then the total value of all items linked is calculated and inserted in to the "Results" panel on the Campaign.
        ii. You can also create these items direct from the Campaign itself from the linked sub-tabs.

What else can I do?

-   Need to send a lot of emails? Check out one of our bulk email plans.

Contacts/Companies

What can you use these modules for?

These modules were developed to hold information relating to your established Contacts and Companies. This may include your customers, suppliers, partners, press, etc. You can choose to use both modules or only one, depending on the way you do business.

How do I use these modules?

There are a few ways to create Contacts and Companies:

1. Via a converted Lead
   a. If you use the Leads module and click the Convert button, a new Contact, Company, and Opportunity will be created.
   b. If you have multiple Leads for the same Company, they will be linked to the existing Company record.
      i. You just to make sure you select the correct Company record on the convert screen by clicking the file icon next to Company name and selecting the appropriate Company.
2. Manually
   a. You can also go into the specific modules and create each record individually. We recommend creating the Company record first and then adding the subsequent Contact records to save you having to add address information repeatedly
   b. Click the "New Contact/ Company" button
   c. Fill in the relevant details
      i. To link a contact to an existing company, click on the file icon next to the Company Name field and select the appropriate company
   d. Click Save
3. Import
   a. If you have the administrative permissions to import records, please see this FAQ on how to carry out this process.

What else can I do?

- Give your customers access to the portal and they can update their own information and so much more

- Tips and tricks for cleaning your data ahead of importing it

Contracts

What can you use this module for?

This module was designed to be used to hold information relating to customer service contracts (although can be used to hold other types of contracts). Contracts can be set up as contracted periods (monthly, quarterly, or annually), pre-paid, ad-hoc, or however your business needs.

How do I use this module?

When you create a new Contract you can:

1. Set the name of the Contract (they are numbered automatically).
2. Decide on the type of Contract
   a. Ad Hoc Tickets
      i. All chargeable time accrued against the Ticket will be billed.
      ii. Any Activity logged against the Ticket and marked as chargeable gets accrued against the Ticket and Contract
      iii. On Ad-hoc tickets, the charge time field is set to chargeable as default.
      iv. When the Ticket closed, it's flagged as "to be billed" automatically and the amount of time to be billed is shown on the ticket in "Time un billed"
      v. Only Activities marked as "Chargeable" are included in this time.
   b. Pre-Pay Tickets
      i. A pre-pay Contract has been purchased which allows the customer a certain number of hours of support without any further charge.
      ii. Any Activity logged against the Ticket and marked as chargeable gets accrued against the Ticket and Contract
      iii. On pre-pay tickets, the charge time on an activity is set to "Chargeable" by default
      iv. Any Activity marked as chargeable will deduct time from the Contract time to give the "time remaining" on the Contract. If a Contract has overrun its allocated time, the amount of time overrun will be calculated in the 'Overrun Time' field.
   c. Standard Contract Tickets
      i. Time is accrued against the Ticket and the Contract as Activities are added. Adding to "Chargeable" and "Non-chargeable" time as appropriate
      ii. Non-chargeable is the default charge type on contracted Tickets
      iii. If any chargeable time is recorded against the Ticket, when it is closed, it is set to "to be billed", as with Ad-hoc.
3. Set the start and end date of the Contract
4. Assign the Contract to one of your Users
5. Link the Contact, Company, Sales Order, and other pieces of relevant, static information.

6. Set the SLA time, if applicable.
    a. There is also a section in the Contract that allows you to set the SLA time depending on the severity of the Ticket.
7. You can also link one or more Assets to the Contract.
8. Under the Contract Detail section, you can set the number of hours included in the Contract. The fields for Chargeable time and Time will be automatically calculated as Tickets are linked to this Contract.
9. Add any notes you might have regarding the Contract to the description field.

To link a Contract to a Ticket:

1. When creating a Ticket, click the select icon next to the field marked 'Contract'
    a. If you have already selected a Contact and Company, this should return only Contracts linked to those records.
    b. If you have not, you can search for the correct Contract and select it.
    c. This will populate that field.

What else can I do?

- Create an Invoice straight from an AdHoc Contract.

Documents

What can you use this module for?

Using this module, you can create or upload Documents to hold in your system that can be sent as attachments in emails, made available to your customers online, or held as internal office procedures.

How do I use this module?

Creating a new Document:

1. In the Documents module, click "New Document"
   a. If you want to use a Document template, read this FAQ for guidance.
   b. This is different from a Mail Merge template.
2. Give the Document a name and assign it a type and folder, if appropriate.
3. If the Document relates only to a single Contact or other type of record, you may also want to link it directly to that record.
4. You can also select whether this document should be available via your customer portal
5. You can now type your Document
   a. To access the full HTML editor, click the small arrow in the top right of the 'Document' text box.
   b. If you want to copy and paste into this text box, right-click and select "Paste." This will open a pop-up that you will be able to paste your text into (using CTRL + V) and then select OK.
6. Add any keywords or additional information.
7. Click Save.

Attaching an existing Document:

1. In the Documents module, click "New Attachment"
2. Give the attachment a name and assign it a type and folder, if appropriate.
3. If the Document relates only to a single Contact or other type of record, you may also want to link it directly to that record.
4. You can also select whether this file should be available via your customer portal.
5. Click 'Choose File' to open a pop-up that will allow you to upload a file.
6. Add any notes and/or keywords needed.
7. Click Save.

If you have administrative access, you can also set Documents to be automatically sent with particular email templates.

Emails

What can you use this module for?

The Email module isn't really a module that people interact with all that often. We aren't an inbox tool, but you can send an email from just about any record in the system, check out previous Emails in the History subtab, and have all of your emails sent from your email client copied directly into OpenCRM.

How do I use this module?

To send an email direct from this module:

1. Click "New Email"
2. Select a Contact, Lead, Company, Personnel member, or User by selecting the appropriate module on the dropdown menu and clicking the file icon.
   a. If you want to include someone in CC or BCC, you will use the same file icon that is next to the 'To' field and select the appropriate action in the pop-up window.
3. You can add an attachment, either from the system (using the file icon) or from your hard drive (using the uploader).
4. Type in your subject and email text.
   a. You can also select a pre-existing email template.
5. Set the security and request read receipt using the tick buttons below.
6. You can also mark the time spent on the email as chargeable using settings in the Billing Information block.
7. Click Send
   a. You can also save the email for later.

What else can I do?

- Don't stop using your email client, check out our integration options.

- Creating and using email templates

SMS

Similarly, you can see SMS texts that you've sent and received by going to the tab labelled 'SMS.'

To send SMS messages, see this FAQ.

If you have administrative access and are interested in setting up SMS alerts and/or messaging, see this FAQ.

Events

What can you use this module for?

The Events module can be used to plan conferences, courses, and other events where keeping track of attendees is important. You can use an Event to organise your schedule, communicate with your Staff, Sponsors, Attendees, and Potential Attendees, track their attendance, and fee payment.

How do I use this module?

1. In the Event module, click "New Event"
2. Enter the basic details. Here you select the programme, Event type, etc.
3. Enter the required number of hours that a person must attend to complete the Event (if relevant).
    a. When a person attends a day or session on an Event, the total number of sessions, and the total time in hours that they have attended on that Event is saved on the relationship between the attendee and the Event.
    b. This basic scoring system allows the user to see if the Attendee has attended enough of the Event/ programme to complete (or graduate from) it.
4. Enter the Event schedule information to create the day records.
    a. You can add more information to the individual days later.
    b. You can come back and add or amend days in the schedule from this screen later.
    c. You can link people to days in much the same way as you can to Events. You can link further attendees, or contributors by clicking the relevant tab and clicking the "Select Contact" link.
5. Save the Event.
    a. This creates the Event and generates the Day records from the schedule specified.
6. You are then taken to the Event detail view
7. To add Contacts:
    a. From the Contact module (on an intermediary screen you will be able to choose the correct Event and set the relationship)
        i. You can select Contacts using the tick boxes and then click the Add to Event button.
        ii. On an individual Contact record, you can click the Add to Event button.
    b. From the Event detail view, go to the relevant subtab (Staff/ Attendees/ Sponsors/ Prospecting) to add the type of Contact you would like to add and click Select Contact.
    c. From the related grids at the right of the page, you can modify information on the relationship between the person and the event / day by clicking the "Edit Link" hyperlink at the end of the row in the grid. This allows you to progress the person through the event.

d. From a Report. If you have the Contact module linked, at the bottom of the Report you will see an "Add Contacts to Event" button. Clicking this will open a screen where you can associate Contacts with an Event. Note that this will pick up ALL Contacts listed in the Report.

8. Additional linked information can be viewed/ added/ edited, including the "Staff", "Attendee", "Sponsors", and the more generic "Pending" and "History" activity tabs.

9. Updating attendee status
    a. From a day record, clicking this button allows you to see all attendees and mark as attended or absent (or other status).
    b. From an Event record, this will show you all attendees, the number of hours they have attended in total, and the number of hours required to complete the Event. This is colour coded - green if they have completed the required time, and red if they have not. You can update each attendees' status accordingly, or, if you tick the tick box to the left of the contacts, you can then update all selected contacts to the status set at the right.

What else can I do?

- Organise your Attendees and Staff and email them in groups

FAQ

What can you use this module for?

This module can be used to store internal procedural documents. It can also, using the customer portal, allow you to post Knowledgebase articles that can be made available to your customer base.

How do I use this module?

1. At the top of the screen you have a number of pick-list fields. You can select:
   a. The category and product to which the FAQ relates
   b. Pick an assigned user
   c. Select a status for the FAQ e.g. is it a draft, published, or for internal use.
      i. If you have the Knowledgebase enabled on your customer portal, selecting 'Published' will make the article available.
2. You can attach documents or a video to the FAQ using the fields provided.
3. Specify the question being addressed.
4. Use the answer field to provide the solution.
5. You also have security settings available.
6. When you are satisfied with your FAQ click Save.

What else can I do?

- How to add YouTube videos to your FAQs.

HelpDesk

What can you use this module for?

This module can be used to create customer support Tickets and to track their progress and escalation. These Tickets can be created manually by your support team and/or by customers via your portal or by simply sending in an email to one or more pre-defined email addresses.

How do I use this module?

1. When you create a new Ticket you are given a number of options:
   a. Title – provide a clear way of identifying the issue being logged.
   b. Linked entities – these all you to link a specific Contact, Company, and Contract to the ticket. You can also link the Product and Project in question if this is appropriate.
   c. There are also a number of drop-down options that will allow you to organise your tickets by Priority, Severity, Status, Category, and the appropriate Queue.
      i. These dropdown menus can be edited by those with administrator access.
2. There is also a Description field that will allow you to give a more detailed description of the support request.
3. You can now click 'Apply' to save the changes you have made and continue to work on the Ticket or click 'Save' to save your changes and close the ticket.
4. When the Ticket is open you are able to add ongoing comments, send these comments to the linked Contact, track the email communication related to the ticket (with the use of Pop2OpenCRM, Google2OpenCRM, or the Outlook Addin), and add a solution.

What else can I do?

- With Pop2OpenCRM integration, your customers can just send an email to create a new ticket.

- Set up automatic ticket escalation to fit with your own SLAs.

Leads

What can you use this module for?

This module was designed to be used to organise and keep track of those individuals who you believe you may do business with at some point in the future. They are potential clients.

Once you have progressed the conversation with a Lead to a point where you think there is a reasonable chance for some business you would go through a process we call *conversion*. All of the information stored in the Lead record is used to create two new records, one for the Company the Lead belongs to and the other a specific Contact record for that individual.

You may also want to create an Opportunity to track the specific business deal you are negotiating.

All previous Emails, Activities, and other linked entities are stored against the newly created records.

How do I use this module?

In order to create a new lead:
1. Click the "New Lead" button within the Leads module.
   a. Alternatively, if you have an existing lead that is similar, you can go into that Lead's record and select "Duplicate."
   b. You can also bulk import Leads if you have been given this permission by your administrator.
2. Fill in the relevant fields.
3. Click Save.

Alternatively, you can also import new leads. If you have the administrative permissions to import records, please see this FAQ on how to carry out this process.

How to convert a Lead:
1. Go into a Lead record or select the tick box on the module home screen.
2. Click "Convert Lead" or "Convert"
3. You will now see a screen with a number of options:
   a. Who you would like the converted records to be assigned to.
   b. The name of the new Company record
   c. Whether or not you would like to create an Opportunity
   d. Some details about the Opportunity
      i. Name
      ii. Expected Close Date
      iii. Estimated Amount
      iv. Sales Stage
      v. Action Plan
4. Click "Save"
5. You will now be taken to the new Company record you have just created.

What else can I do?

- Automatically assign a Lead based on post code

- Set up a round robin that observes who is on holiday

Opportunities

What can you use this module for?

The Opportunities module allows you to track an ongoing piece of business.

Using the Sales Stage of the Opportunity, you can track the progress of each potential piece of business. You can see which Opportunities need attention and which are close to closing and how much they are worth. This allows you to target your attention to ensure that you make the most of your sales pipeline.

Linking Quotes, Sales Orders, and Invoices to a particular Opportunity will also give you a complete history of the negotiation of a piece of business.

You can also use the Opportunity Pipeline to get a visual snapshot of your Opportunities and how these relate to your monthly, quarterly, annual, and other targets.

How do I use this module?

How to create an Opportunity:

There are three ways to create an Opportunity: Manually, via Conversion, or through an import.

1. Manually:
    a. Go to the Opportunities module and click "New Opportunity"
    b. Fill in the relevant details
        i. Opportunity Information – This block gives the starting point of the Opportunity and includes the estimated value of the piece of business, the expected closing date, and what sales stage the opportunity is at.
    c. Click "Save"
2. Conversion
    a. When you convert a lead, you are given the option to create a new opportunity. On this screen you can fill in the subject of the Opportunity, the estimated value of it, and the expected close date.

3. Import
    a. If you have the administrative permissions to import records, please see this FAQ on how to carry out this process.

How to link a Quote/ Sales Order/ Invoice to your Opportunity:

There are also two ways to link a quote, sales order, or invoice to an Opportunity.

1. From the Opportunity record:
    a. When you view an Opportunity, you can select to create any of the above records using the dropdown menu under the "Quote" button
    b. By clicking this button, a new Quote/ Sales Order/ Invoice is created using the information in the Opportunity.

c. This also links the two records and can also update the value of the Opportunity if the amount of the linked record is different from the Opportunity (if this setting is enabled).

d. Click "Save"

2. Manually:

a. If you go to the relevant module, i.e. Quote, Sales Order, or Invoice and create a new record you can manually link the Opportunity using the appropriate field.

How to use the Opportunity Pipeline:

1. In the Opportunities module, click on the icon on the right side, just above the results grid.

2. This will open a pop-up window that shows your Opportunities for a particular period of time. The first bar represents your open Opportunities, the second your 'Closed Won' opportunities, and the third is a combined total of opportunities in their final stages (although this combined total will be set by your administrator).

3. The pipeline graph will also show you your target for this particular time period as a horizontal line.

4. You can change the time period you would like to see using the dropdown menu at the bottom of the screen.

5. Depending on your permissions, you may also be able to see other team members' Opportunities.

What else can I do?

- Setting up User and Company Targets

Personnel

What can you use this module for?

The Personnel module is a great way to keep track of all the necessary details for your entire team that also gives you the tools to track sickness, holiday, and even sales commission.

Note: You do not have to link your Personnel records with your user records, but this will allow you to track holiday and sickness in OpenCRM.

How do I use this module?

To create a new Personnel record:

1. Click New Personnel
   a. If you start with those employees who have people reporting to them, you can set this as you go, rather than having to go back and add this information later.
2. Fill in the relevant information
   a. Personnel Information: This block holds the main details, including important employee details here such as their NI number.
      i. You can select to link a Personnel record to a particular user of the system. This will allow you to track sales commissions and other key performance indicators.
   b. Additional Information: Other personal details are held here, including their department, date of birth, marital status, etc. (if needed)
   c. Appraisal Information: Within this block you can hold important information about the appraisal process and how it applies to this employee.
   d. Next of Kin: This section enables you to hold details of Next of Kin.
   e. Driver Information: You can track information about the employees driver history, including the type of license, expiry date, license number and their vehicle registration number.
   f. Benefit Information: This section allows you to hold information about any specific benefits that the employee gets in relation to their employment with you.
   g. Holiday Entitlement: You can record the number of days holiday that this employee is allowed. The total number of days triggers certain notifications during the holiday year to help your administrator keep track of entitlement and how this has been allocated.
   h. Address Information: This is the section that allows you to hold the employees home address details.
3. Click Save

What else can I do?

- Keep track of employee sickness and holiday allowance.

Products

What can you use this module for?

This module can be used to manage your Product or Services database, including listing buy and sell prices, descriptions, associated product documentation, and basic stock levels. It can also be used to create and manage Pricebooks to hold unique pricing information and assign these to your customers.

How do I use this module?

How to create a new Product:

1. You may need to select which category your Product belongs to before filling out the details of the record. This is an optional process that your system admin may have enabled.
2. The first part of the screen allows you fill in the basic information about the product, including the supplier and installer (if applicable).
3. The next part of the screen is where you fill in the information relating to the buying and selling price of the Product.
4. In the Stock Information block, you can add information about the unit of the product and other information relating to stock levels.
5. Further down the page you can also add a product image and description (in several languages), as well as any necessary associated documents.

What else can I do?

- Add product documents and make sure they get sent out with your invoices
- Add multiple products to a Quote/Sales Order/Invoice
- Create product bundles

Pricebooks

If you are interested in using PriceBooks, there is an FAQ to walk you through setting them up.

Assets

You can use OpenCRM to track all manner of Assets that your organisation needs to manage. This could include equipment which has been entrusted to members of staff or pieces of kit that are on lease to clients.

Assets can be managed by linking them to Support Tickets in the Helpdesk module, and by linking them to Contracts allowing you to manage your individual Products and Services.

You can also run Reports regarding your Assets giving you a complete picture of your client accounts and their related Assets. These can include information such as which Assets are located where, when any licenses, subscriptions or warranties are due for renewal and so much more.

- There is an FAQ that will walk you through using Assets.

Projects

What can you use this module for?

OpenCRM contains a full Project Management module to help you manage customer-centric activities and deliver an ongoing service. This is where you can collect related tasks, assign Activities to the members of your team, and track the progress of a Project as a whole.

How do I use this module?

There are a number of settings and fields in the Project Information box that allow you to set basic information.

When creating a Project you can:

1. Schedule your start dates and target/actual end dates
   a. This lets you keep track on your scheduling and progress.
2. Choose a Project Type, by selecting one of the options from the drop-down menu.
3. You can link the Project to a Contact and Company using the fields provided.
4. You can also link the project to a third entity. This can be any one from a drop down picklist.
5. The Status and Scheduling Fields allow you to progress the Project.
6. Use the Project Detail box to set the Budget, Project Time, Costs, Email, and the VAT rate.
7. Track the days and hours spent on a Project
   a. The time spent on a Project is logged via the Activities module.
   b. When you complete an Activity you can enter the amount of time spent on that particular task/activity.
   c. You can also select whether this time is chargeable or non-chargeable. This way you can track the time spent on a job where you have sold a certain amount of service time.
8. Below the Project Details section you can enter the Project Description.

What else can I do?

- With Pop2OpenCRM integration, make sure all Project communication is kept in one place.

- Let your customers see the progress of their project through your customer portal.

- Export a PDF with or without a grid of linked Activities

Quotes/ Orders/ Invoices

What can you use these modules for?

These modules can be used to hold information about prospective and ongoing financial transactions. You can also send PDFs to your Contacts, which will update linked records, including Opportunities, Campaigns, Events, and Products.

How do I use these modules?

There are three ways to create these records:

1. From scratch:
   a. To create a Quote, Sales Order, Invoice, or Purchase Order from scratch, simply navigate to the relevant module and click "New Quote/ Order/ Invoice"
   b. Fill in the necessary details, ensuring that you link any Opportunities, Campaigns, or Events that you would like to be updated in reference to this record.
   c. Add Products to the record by clicked the "eye" icon within the Product grid.
       i. If you want to add multiple Products, make sure you tick the box "Keep Window Open" on the pop-up window.
       ii. Add any discounts or mark-ups, as appropriate.
       iii. You can also change/remove shipping and VAT rates.
   d. Click Save.
2. From an existing record:
   a. If you are in a Contact, Company, or Opportunity record, if you hover over the button labelled "New Opportunity/ Quote/ Sales Order/ Invoice" you can select the type of record you would like created.
   b. This pre-links a number of fields and, depending on what stage in the purchase cycle you're in, adds any products (with discount, mark-up, VAT, and/or shipping changes).
       i. You can edit any of this information and/or link additional records as appropriate.
   c. Click Save
3. Import
   a. If you have the administrative permissions to import records, please see this FAQ on how to carry out this process.

To send a PDF of the record:

1. From the view screen of the Quote/ Order/ Invoice, there are two buttons: Export to PDF and Email PDF
2. If you select "Export to PDF", a PDF will be created and downloaded to your computer. From here you can print it and send it via post or fax it, depending on your preferences.

3. If you select "Email PDF", the PDF will be created and added to an email with the linked Contact or Company email address pre-populated.
   a. If you have multiple email templates they have be configured to use with a particular module.
   b. If you have a linked Company that has a billing email pre-defined, it will use this. Otherwise it will send to the linked Contact.
4. Click Send.

If you have administrator access, you can also edit the PDF templates used.

What else can I do?

- Set up your portal to let your customers e-sign their Quotes or Sales Orders

- Add cover pages to your PDFs

Reports

What can you use this module for?

A Report is a great way of showing information to you in graphic, detail or summary form. This data can be exported to PDF, Excel or CSV. This can be a one-off report or a recurring one that is set to occur when you need it – monthly, weekly - you can select and define how often the report needs to be run. You can select which Users or Contacts you would like to receive these scheduled Reports.

You can show also Report data on your Dashboard (details above), giving you an overview of the data you wish to see.

How do I use this module?

Some things you need to know BEFORE you start

- Which module do I want to look at?
  - Identify the best module for the data you are interested in – decide which module in OpenCRM is likely to be home to the bulk of the data. 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. This is where you need to filter data. A report showing ALL Leads is likely be too big to be of any use, whereas a report showing new Leads from the last seven days is probably more useful.

Creating a Report

1. Go to the Reports module and click 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
   b. Select which columns you want to show on the report.
      i. The menu on the left allows you to select the fields from the module(s) you are reporting on.
   c. If you are carrying out a Summary report, you will want to decide on the grouping of your data.
      i. This is useful as a way of organising your data.
      ii. It will also provide you with a tabulation of the first grouping at the bottom of your report.
   d. Choose columns to total
      i. You have options for 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, and be sent via Email to you or other Users.
   g. 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 get an error message

    h. Home page settings

        i. As discussed above.

    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 can be exported to 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'

What else can I do?

- Email a PDF of your report to your customers at the end of every month.

- Set up your own financial periods to track the way you do business.

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.

open crm

We're here if you need us.

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