USER MANUAL

CRM Version upgrade for Commercial Bank of Ceylon PLC

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1. Introduction

Welcome to the User Guide for SimpleCRM. This comprehensive guide will help you navigate and utilize the various features and functionalities of our product. Whether you are a new user or an experienced one looking to delve deeper into the capabilities of SimpleCRM, this guide is here to assist you.

1.1. Getting Started

Logging Into SimpleCRM

SimpleCRM allows you to log in using your username and password, provided by your own system administrator.

1.2. Forgot Password

If you forget your CRM password and cannot access your CRM user account, you can use the 'Forgot Password' feature to re-set your password to the email address associated with your user account. Clicking the 'Forgot Password?' link on the login form will display the forgot password form.

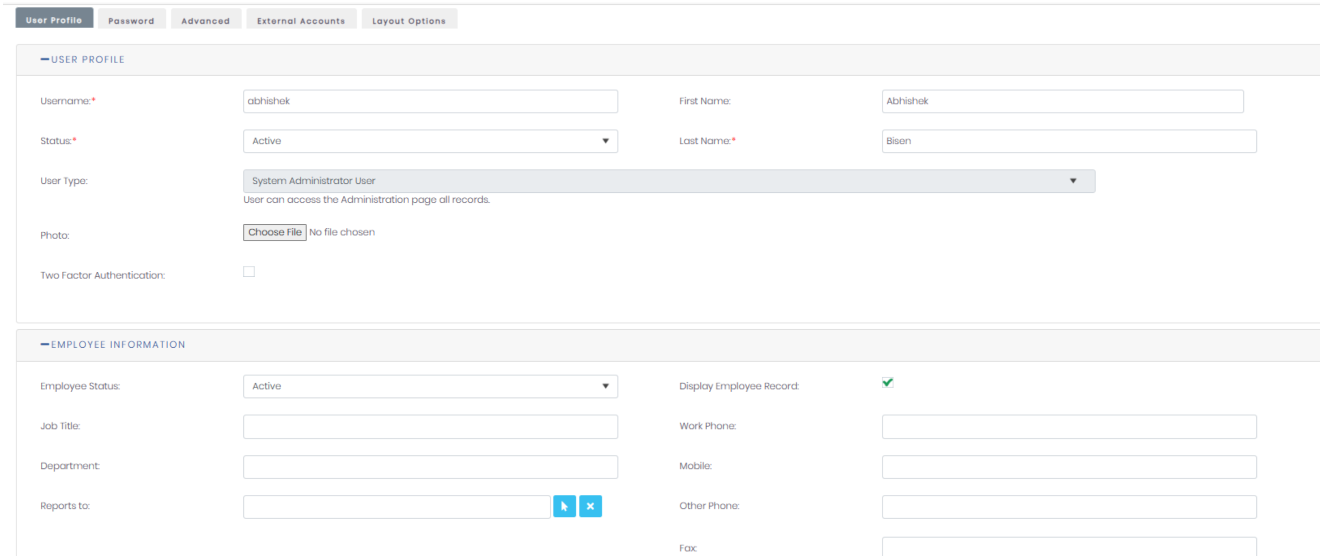
1.3. Summary

In this chapter, we have demonstrated how to access SimpleCRM using the login form. We have also established how to use the forgotten password functionality to retrieve a user's password in the event of the password being lost or forgotten.

In the next chapter, we will cover the User Wizard, which allows you to set your preferences when using SimpleCRM. Managing User Accounts

There are many configuration options available to users once logged into the system. You can view/modify your preferences by clicking on your name in the top right section of the navigation menu and choosing the Profile option.

You can edit your profile by clicking the ‘Edit’ button in the top right corner. Once you have clicked to access your preferences, you will be taken to the 'User Profile' tab, which gives an overview of your credentials such as Username, First Name, Last Name, title, etc.



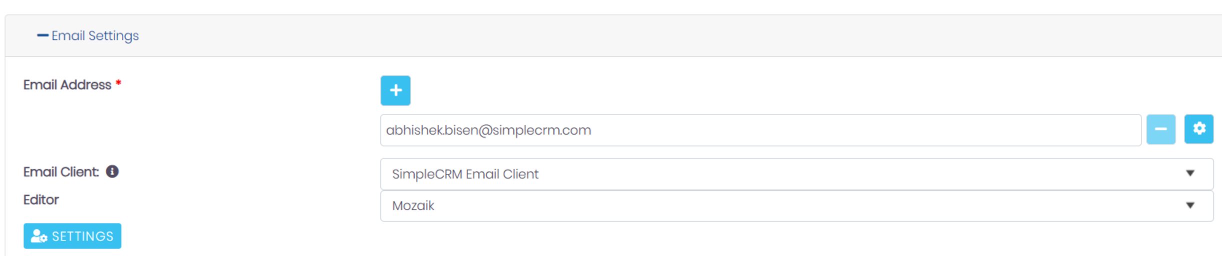
2. Personal Email Account Settings

Setting up a personal email account in SimpleCRM allows you to view personal mail accounts within the Emails module.

Emails from personal mailboxes are not stored in the SimpleCRM database unless manually imported.

2.1. User Profile Email Settings

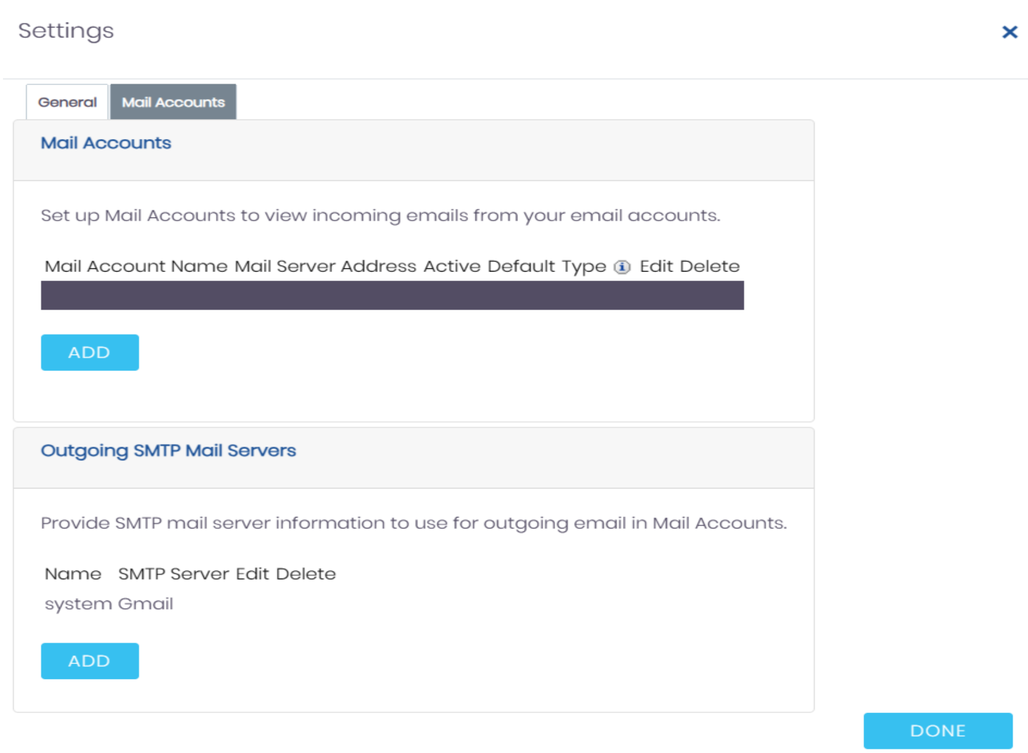
Open the user profile and scroll to the bottom of the main User Profile tab to view mail settings. Note that if you are configuring mail settings for another user, you will need to select Edit from the Actions menu to see these settings.



- Email Address - Add the email address(es) for your SimpleCRM account. Click + to add more addresses. If you have more than one email address, you can specify which is the main address for your account using the primary radio button. You can also specify which account to use as the reply-to account.
    - Email Client - This setting controls which editor is used to compose and send mail when you click on an email link in SimpleCRM, for example, an email address on a contact or account record.
    - SimpleCRM Email Editor - The SimpleCRM Emails module editor will be used
- External Email Editor - With External Email Editor set, mail links in SimpleCRM will open in whichever email client you have set to open mailto:// links, for example, Outlook or Thunderbird.
- Email Editor - This allows you to set the editor used when creating and editing email templates and also within the Campaigns module. Note that the Email Editor setting does not affect the SimpleCRM Emails module compose view. This setting is not currently user-definable. Available options are Mozaik, TinyMCE, and Direct HTML.

2.2. Adding a Personal Mail Account

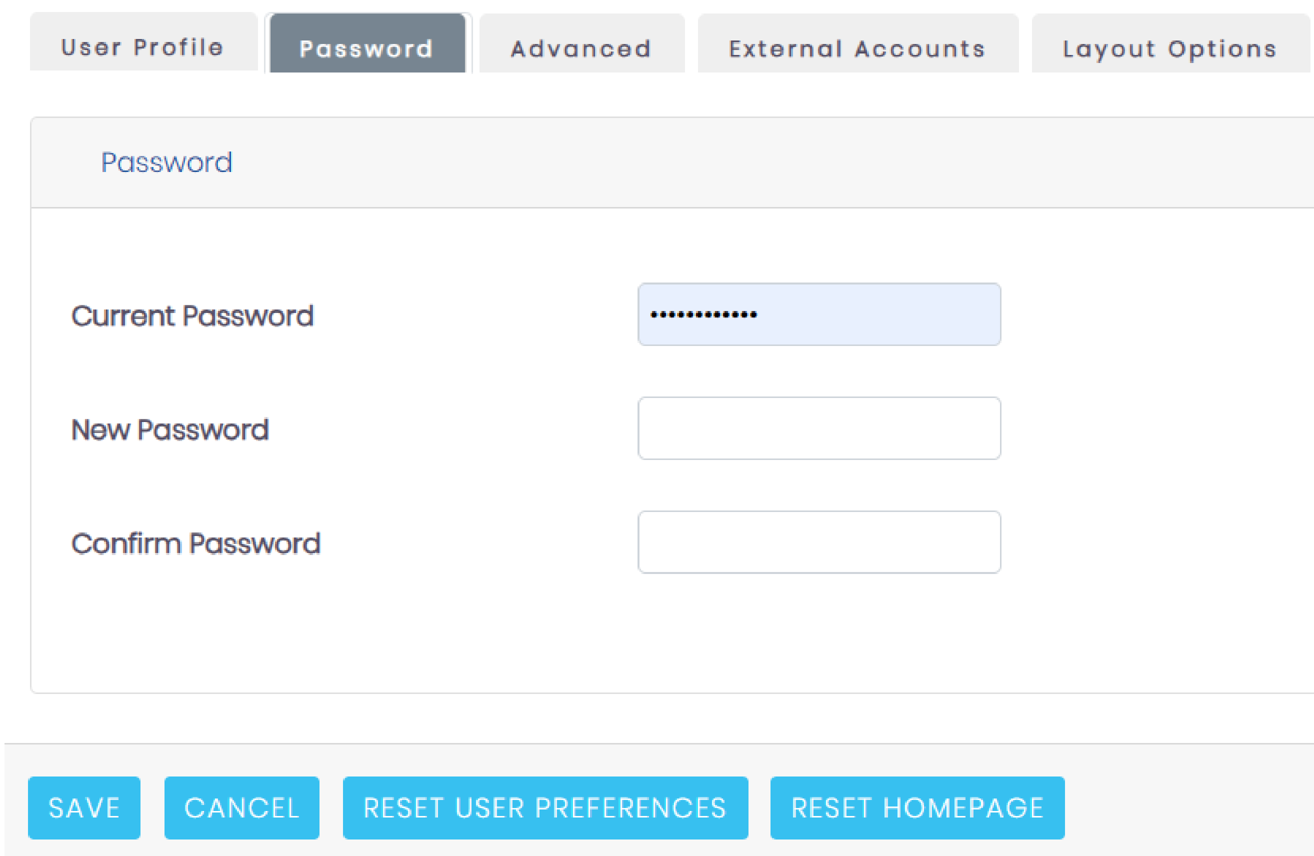
Click the **SETTINGS** button at the bottom of the main User Profile tab to add a personal mail account. Select the Mail Accounts tab and click **ADD** under Mail Accounts to set up your incoming mail account.



Fill in the necessary information for the account in the dialog box that appears. You will require the username and password of the account you are adding, along with the mail server address. SimpleCRM supports the IMAP mail protocol. Additionally, you may need to configure the mail server port if it deviates from the default IMAP setting. Your system administrator should be able to provide you with these settings.

2.3. Password Tab

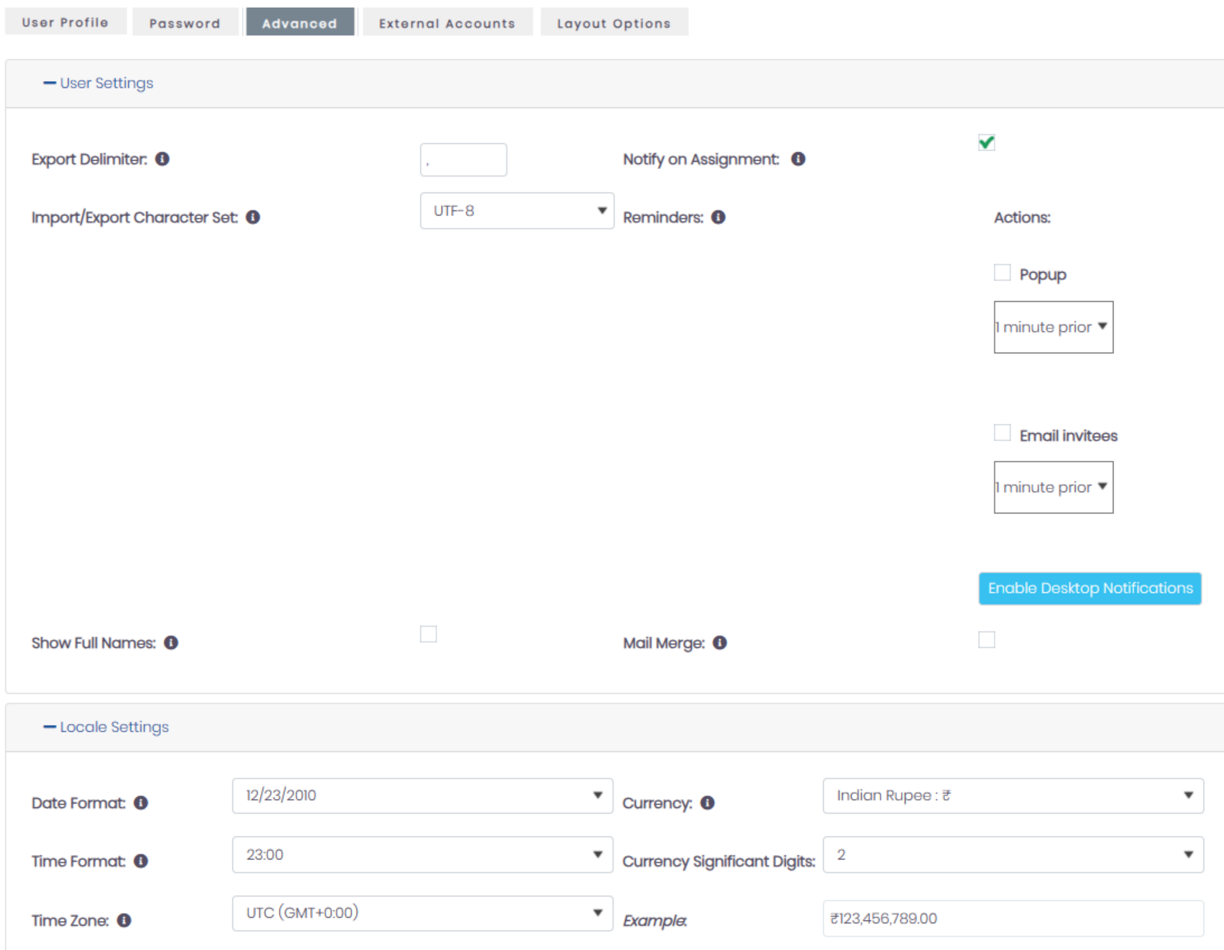
Clicking on the 'Password' tab will give you the opportunity to change your user account password, if required. To change your password, enter your current password first, then specify a new password and confirm it. It is recommended that passwords be secure. The recommended minimum requirement is one uppercase character, one lowercase character, one numeric character, and a minimum password length of 8 characters.



If you have forgotten your password and cannot login, you can use the forgot password functionality detailed in the Getting Started section of this User Guide.

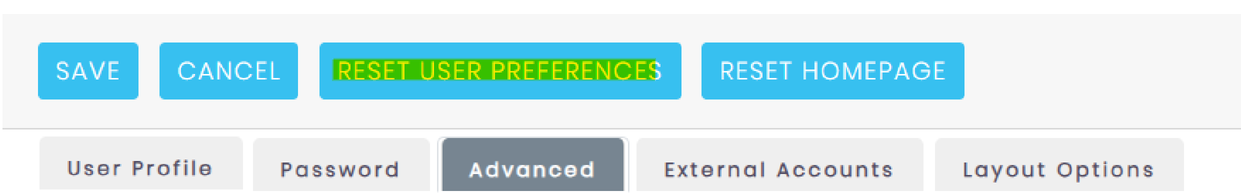
2.4. Advanced Tab

The Advanced tab provides you with your preferences that you set during the User Wizard process. This gives you the ability to change any of your user preferences if there are any mistakes or if you need to amend them at a later date.



2.5. Resetting a User's Preferences

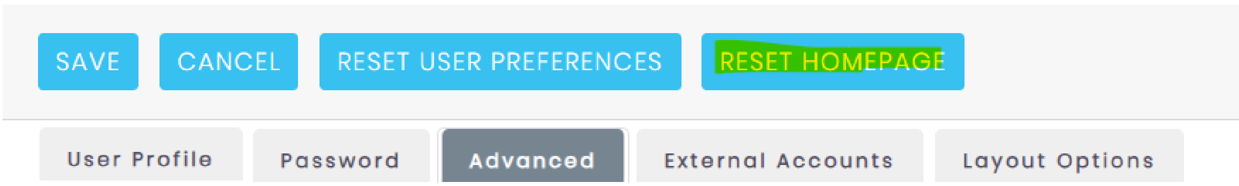
You can reset your user preferences to the system default by clicking the Reset User Preferences button at the bottom of the page.



Clicking the button will prompt you to ensure you wish to reset your user preferences, with the following message: “Are you sure you want to reset all of your user preferences?"

2.6. Resetting a Users home page

You can reset your home page to the system default by clicking the Reset home page button at the bottom of the page. This will reset both dashlet and dashboard preferences and layouts to the system default.



Clicking the button will prompt you to ensure you wish to reset your homepage, with the following message: “Are you sure you want to reset your homepage?”. You can then click 'OK' or 'Cancel' to take action appropriately.

2.7. Summary

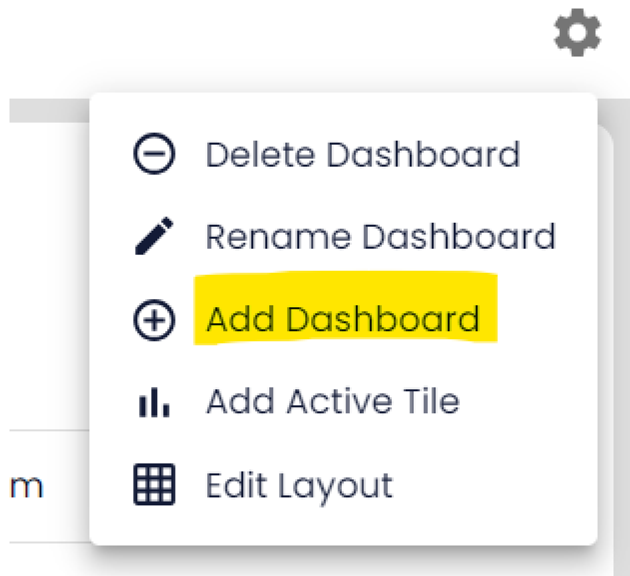
In this chapter, we covered managing a user account. This allows you to manage your information, modify or reset user preferences, and more.

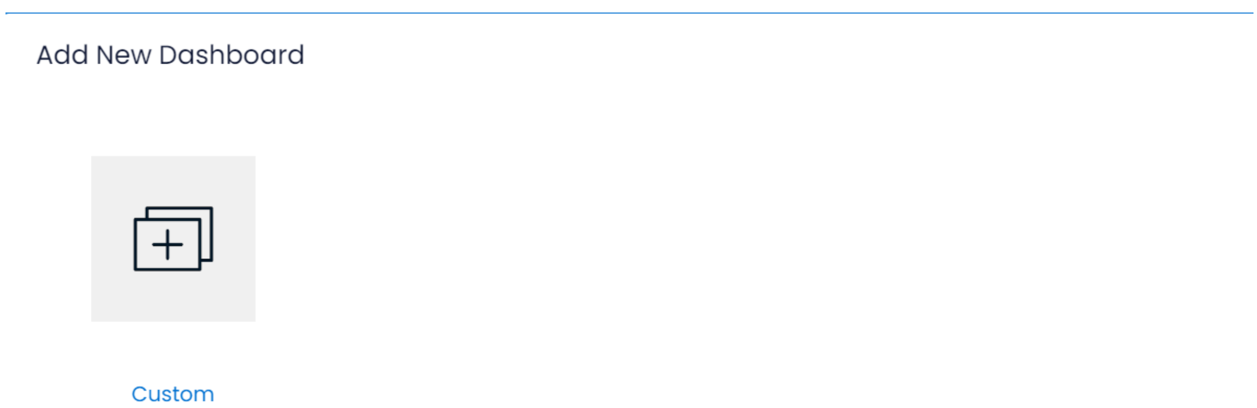
In the next chapter, we will cover the interface. The interface is an integral part of SimpleCRM. With the knowledge of your interface, you can progress to learning more about SimpleCRM functionality and processes.

3. Home Page & Dashboards

The home page is the first page that is displayed to you post-authentication. The home page has various elements that can be used and configured, such as dashlets, dashboards, and the sidebar.

Clicking on the 'Add Dashboard' link will open up, which allows users to create a custom dashboard, name it, and then, after clicking on Add Active Tile, the user can add or select various tiles.

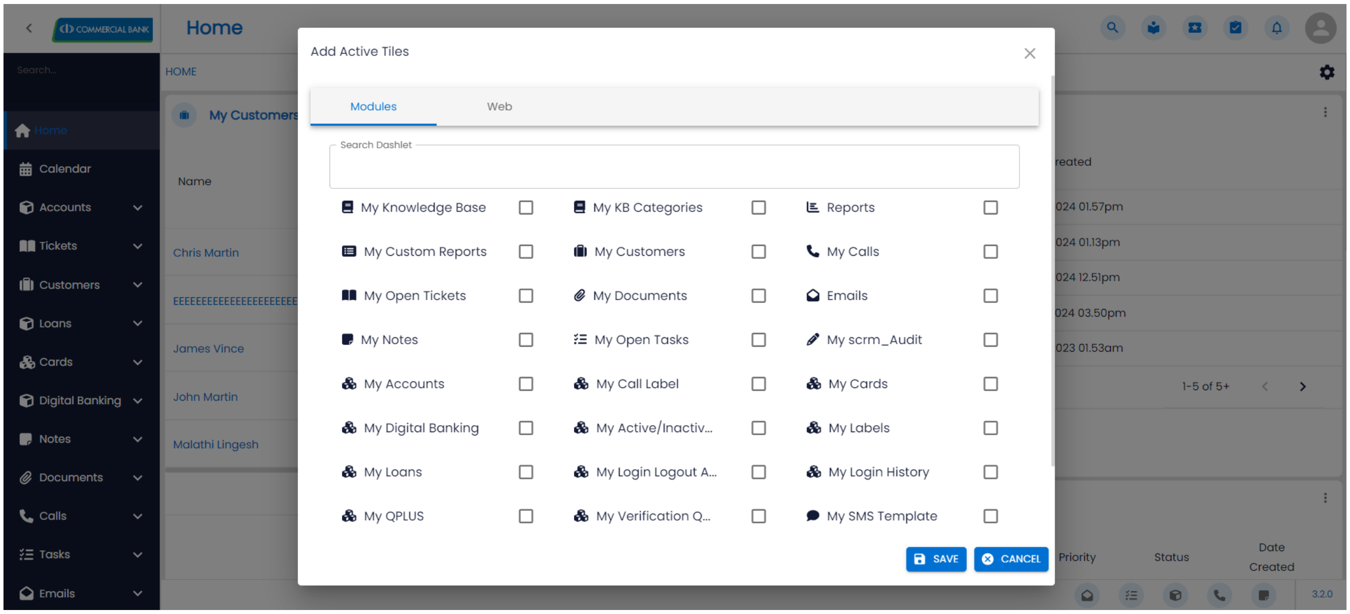




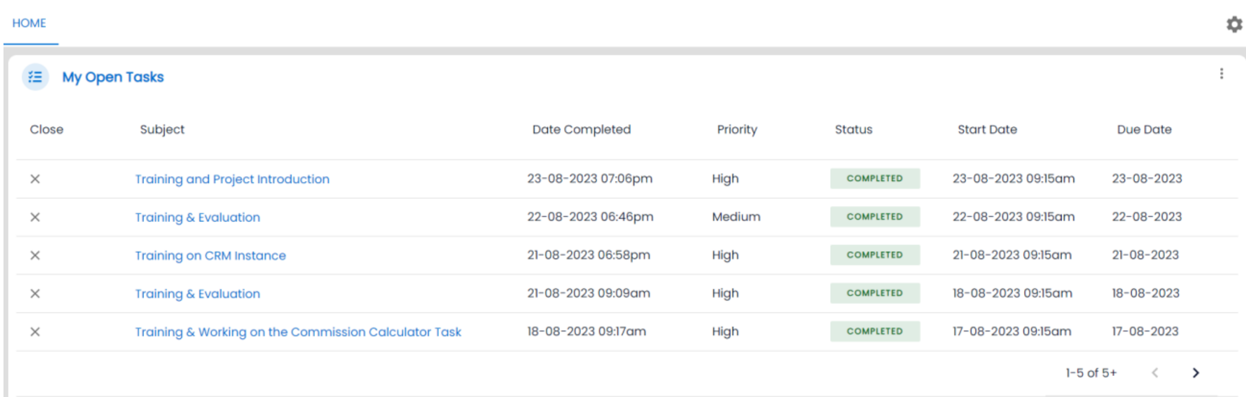
3.1. <u>Dashlets</u>

Dashlets are user-configurable sections displayed on the dashboard that give you a quick overview of your records and activity immediately after logging in. This is particularly useful for sales and support-led teams, as it reduces the number of clicks required to view or modify data.

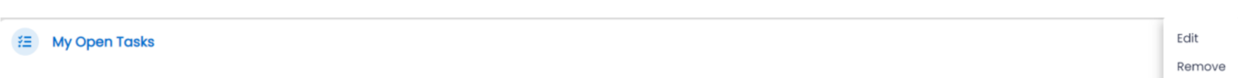
Dashlets can be rearranged within each dashboard by dragging or dropping them to the required location. You can add a dashlet by choosing the 'Add Dashlets' option from the Actions tab.



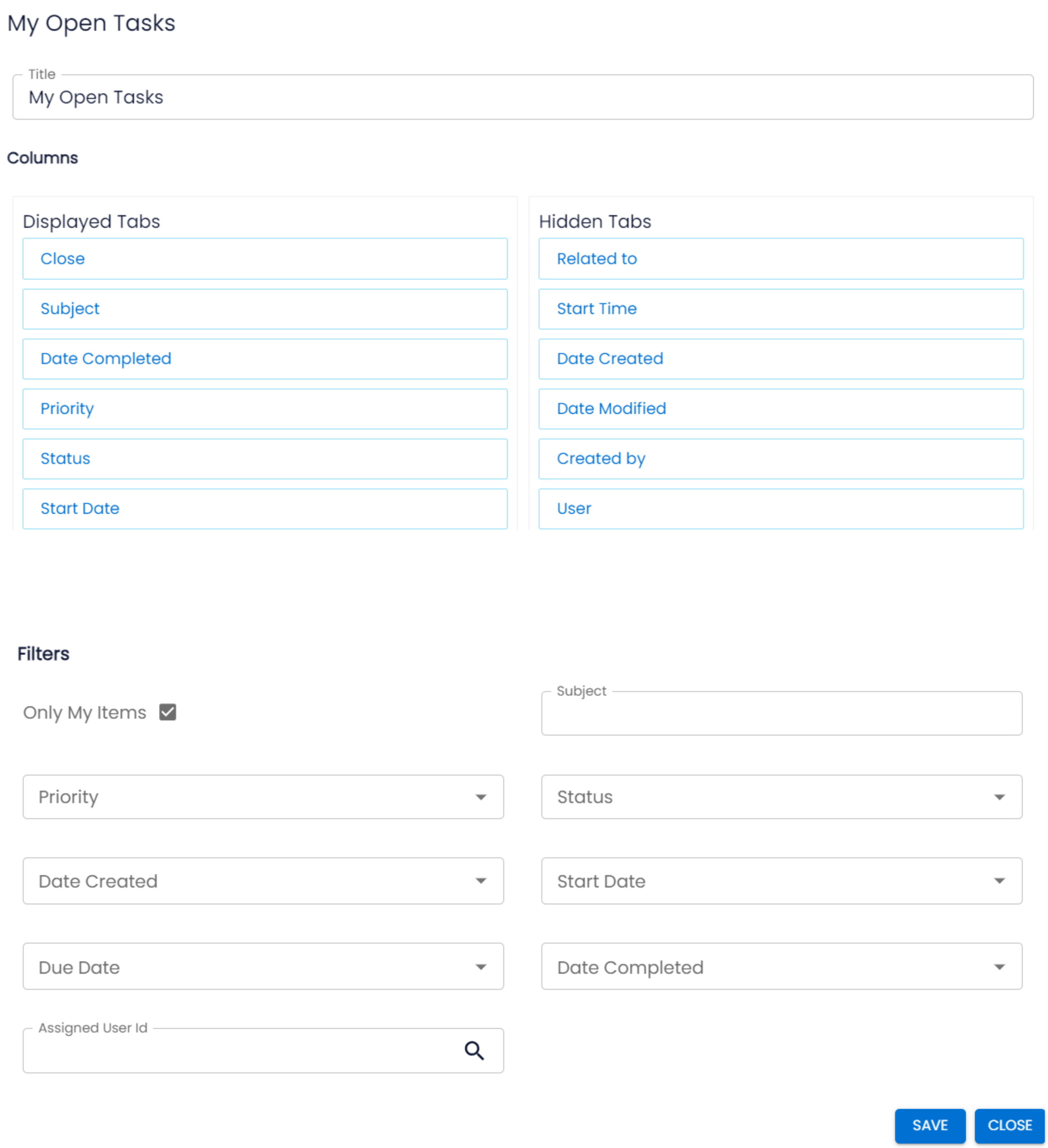
To add one of the tiles or dashes, simply click on the dashlet link. This will add the dashlet to the dashboard. The popup will remain if you add a dashlet, to allow users to add multiple dashlets. Once you have added your required dashlets, you can close the popup.



You can modify dashlets by clicking the edit button on the desired dashlet, as well as remove the tab.



Clicking the pencil icon will display a popup. This popup will contain all of the options that are configurable for the dashlet.



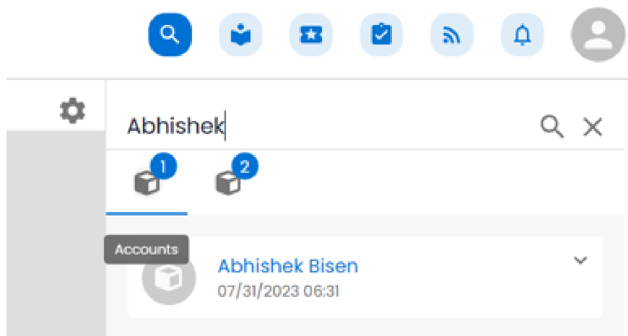
3.2. Search

Searching is a vital aspect of the CRM, as this allows you to quickly define what it is you want to see. Many CRM's will have large data sets, so it is vital that you have a way to refine your search. In the following subsections, we will cover the various searching options available to you.

3.2.1. Global Search

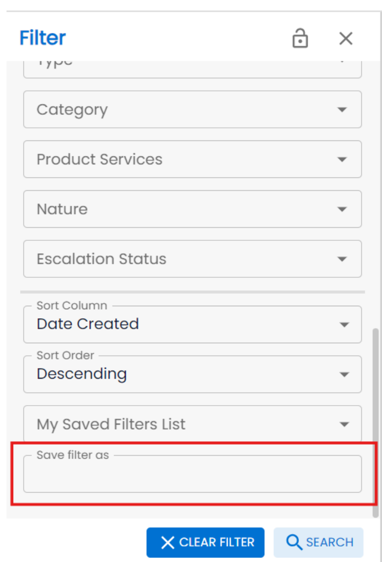
You can search all records within the CRM using the global search functionality. You can search for records via global search, which is found in the main navigation menu at the top of the page.

Once you have entered your search term, you can press the return key or click the magnifying glass/search icon. This will return records that match the search criteria and categorize them by the modules available.



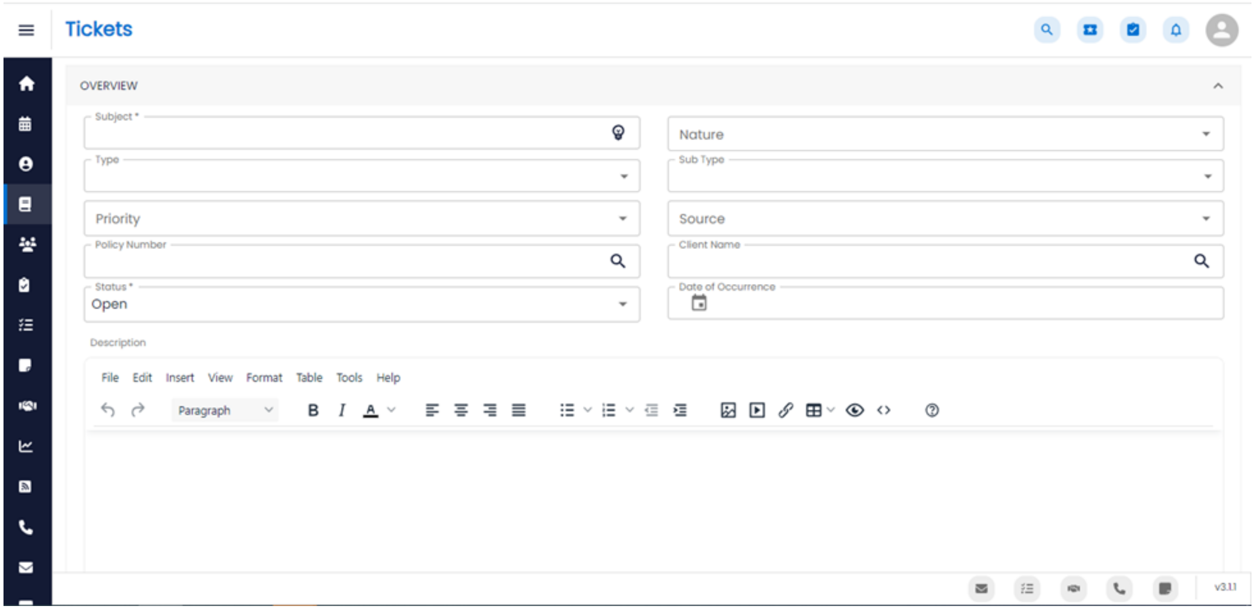
3.2.2. Basis Module Search

Basic search is available on all modules within the CRM. Basic search, as standard, allows users to search on the record name.



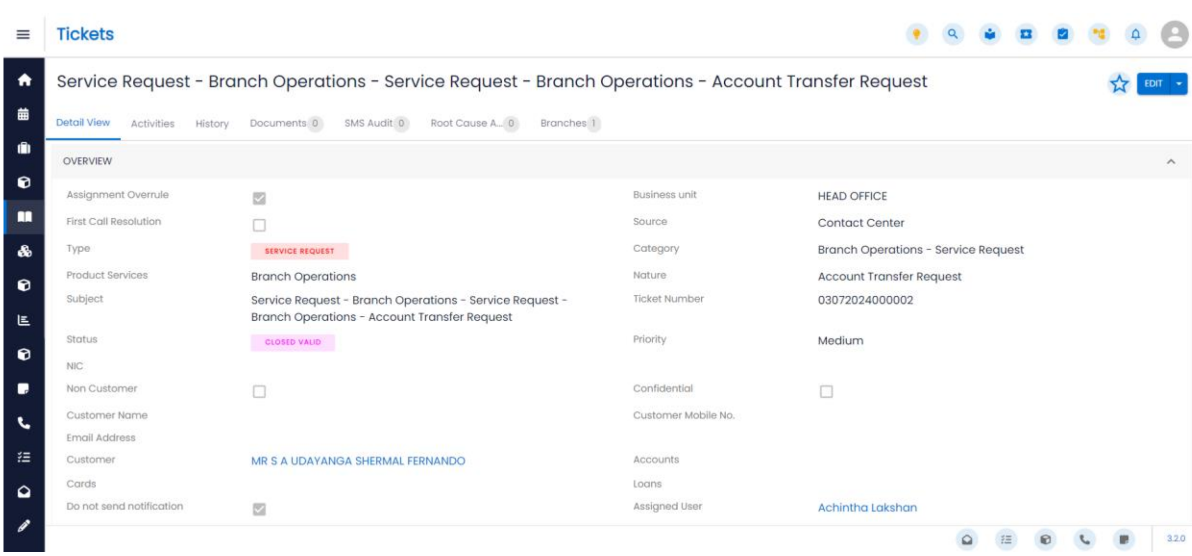
The user can also use the above filter option to search records as per the requirements. The user can save the filter for future preference. To save the filter, use the “Save filter as” field, add the required name to the filter and click on the search button, the filter will get saved automatically. All the saved filters will appear in “My Saved Filters List” for future use.

3.3. Edit View



This view appears when the user wants to edit the record or create a new one. Users are supposed to enter details in the fields appearing in this view.

3.4. Detail View



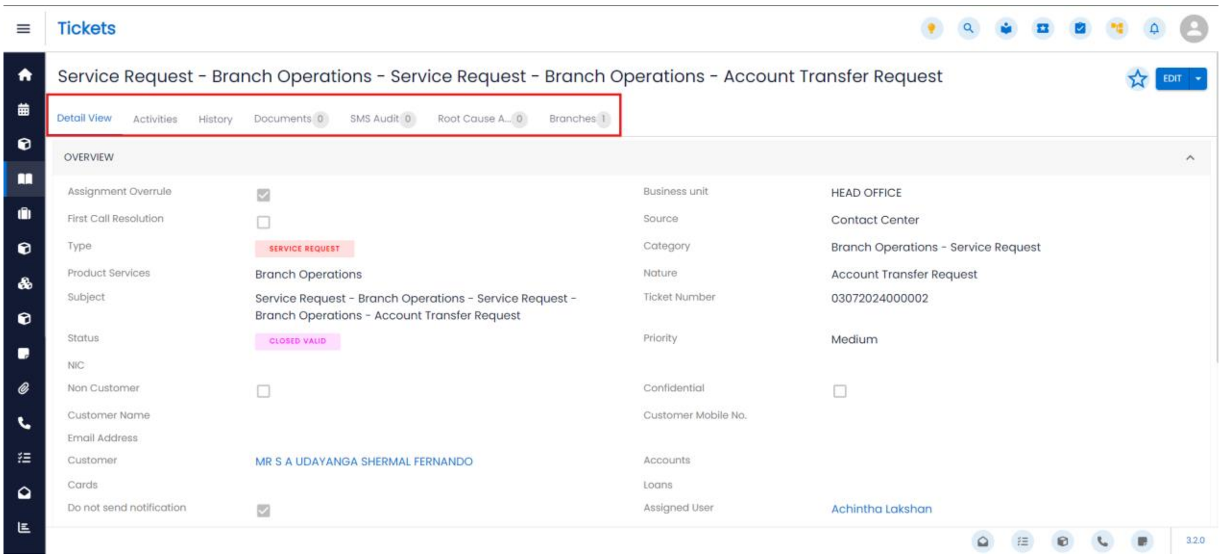
This view appears when the user clicks on the record hyperlink (subject) or when they are done editing the record and click save. This view gives a glimpse of what data the user has entered in the fields.

3.5. Subpanels

Subpanels are accessible by navigating to the detailed view of any record. They provide additional information related to the primary record and allow users to view and interact with related data without leaving the current context.

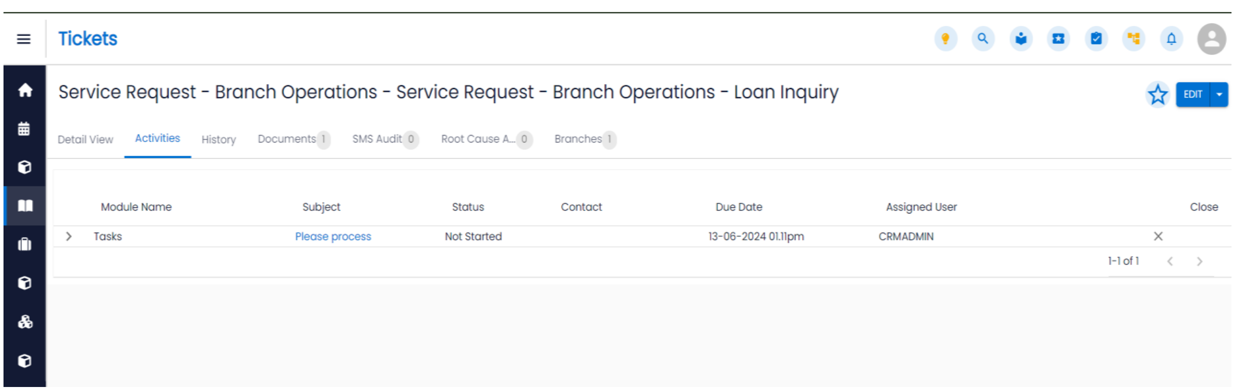
Here's how you can access subpanels:

- Navigate to the detail view of a record in the CRM system.
- Each subpanel represents a different module or related entity, such as activities, history, tickets, or feedback.
- By clicking on a subpanel, users can view more detailed information or perform specific actions.



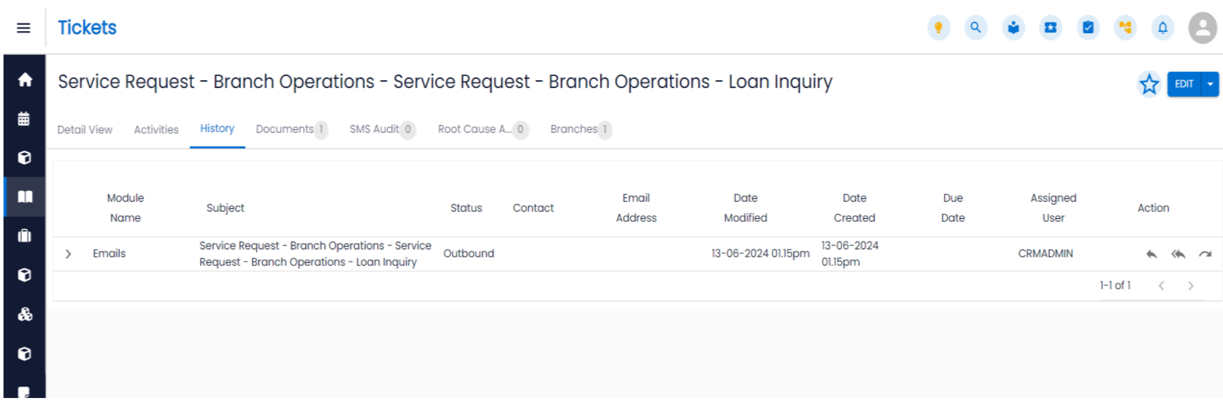
3.5.1. Activities (Subpanel)

The users can check all the planned activities assigned to them under the Activity subpanel.



3.5.2. History (Subpanel)

All the activities completed by the users will appear under the History subpanel.



Similarly, you can go through all the subpanels for other modules as well.

4. SimpleCRM Core Module

4.1. Accounts

The Accounts module is the Commercial Bank Product which you can create an association with most records in SimpleCRM. All the data of the Accounts which are related to a customer is fetched through the Commercial bank Database using Talend jobs Server in SimpleCRM. The Accounts product contains various sub-products such as Savings Account, Current Account and Fixed Deposits.

Accounts Actions - You can access the account actions from the Accounts module menu drop down or via the sidebar. The account actions are as follows:

View Accounts – Click on Accounts in the navigation panel and you will be redirected to the List View for the Accounts module. This allows you to search and list account records.

To view the full list of fields available when creating an account, see Accounts Field List.

Managing Accounts -

- To sort records on the Accounts List View, click any column title that is sortable. This will sort the column either in ascending or descending order.
- To view the details of an account, click the account name in the list view. This will open the record in Detail View.
- To track all changes to audited fields in the account record, you can click the View Change Log button on the account's Detail View or Edit View.

Cards, Loans and Digital Banking modules can also be accessed in a similar way.

For all the products such as Accounts, Cards, Loans, Digital Banking, the data for these modules is fetched from the Commercial bank Database using Talend Job.

In the Accounts module, whichever information is related to a particular account number, all that information can be fetched through the sub panels that are present in the detail view of that particular account number.
Similarly, we can access all the information related to a customer regarding the Cards, Loans and Digital Banking through the sub panels that are present in the detail view.

4.2. Customers

Customers Module has all the customers listed that are aligned with Commercial Bank. All the data of the Customers is fetched through API using the Talend Jobs Server. As the data is a real time data, the edit and delete access has been restricted for all the users.

Customers Actions - You can access the Customer's actions from the Customers module detail view or via the sidebar. The customer actions are as follows:

View Customers – Redirects you to the List View for the Customers module. This allows you to search and list Customer records.9

Managing Customers

- To sort records on the Customers List View, click any column title that is sortable. This will sort the column either in ascending or descending order.
- To search for a customer, see the Search section of this user guide.
- Create, Edit,Duplicate, Merge and Delete options are disabled for all the users as well as the Admin.
- To view the details of a customer, click the customer name in the list view. This will open the record in Detail View.
- To track all changes to audited fields in the Customers record, you can click the View Change Log button on the Customer's Detail View.

4.3. Calendar

The Calendar module in SimpleCRM allows you to manage your time by scheduling meetings, calls, and tasks. Users may share their calendar so they can allow others to view their upcoming activities. These activities will be displayed in the Calendar module given that the user concerned is a participant or the task has been assigned to them.

Calendar Actions - You can access the Calendar actions from the Calendar module menu drop down or via the Sidebar. The Calendar actions are as follows:

Schedule Meetings – A new form is opened in the Edit View of the Meetings module to allow you to create a new Meeting record. This record will display on the Calendar.

Schedule Calls – A new form is opened in the Edit View of the Call module to allow you to create a new Call record. This record will display on the Calendar.

Create Task – A new form is opened in the Edit View of the Tasks module to allow you to create a new task record. This record will display on the Calendar.

Today redirects you to the day format of the calendar for the current day.

4.4. Calls

The Calls module in SimpleCRM allows users to schedule and log a record of inbound and outbound calls that they may be a participant in.

Calls Actions - You can access the Calls actions from the Calls module menu drop-down or via the Sidebar. The Calls actions are as follows:

Log Call – A new form is opened in Edit View to allow you to create a new Call record.

View Calls – Redirects you to the List View for the Calls module. This allows you to search and list Call records

Import Calls – Redirects you to the Import Wizard for the Calls module. For more information, see Importing Records. To view the full list of fields available when logging a Call, See the Calls Field List.

Managing Calls

- To sort records on the Calls List View, click any column title that is sortable. This will sort the column either ascending or descending.
- To search for a Call, see the Search section of this user guide.
- To update some or all of the Calls on the List View, use the Mass Update panel as described in the Mass Updating Records section of this user guide.
- To duplicate a Call, you can click the Duplicate button on the Detail View and then save the duplicate record.
- To close a Call, click on the 'x' icon on the Calls List View. You can also close a Call by clicking the Close button on the Detail View of a Call. You can also click the Close and Create New button. This will close the Call you are viewing and redirect you to the Edit View to create a new record.
- To Reschedule a call, you can click the Reschedule button on the Detail View of a Call..

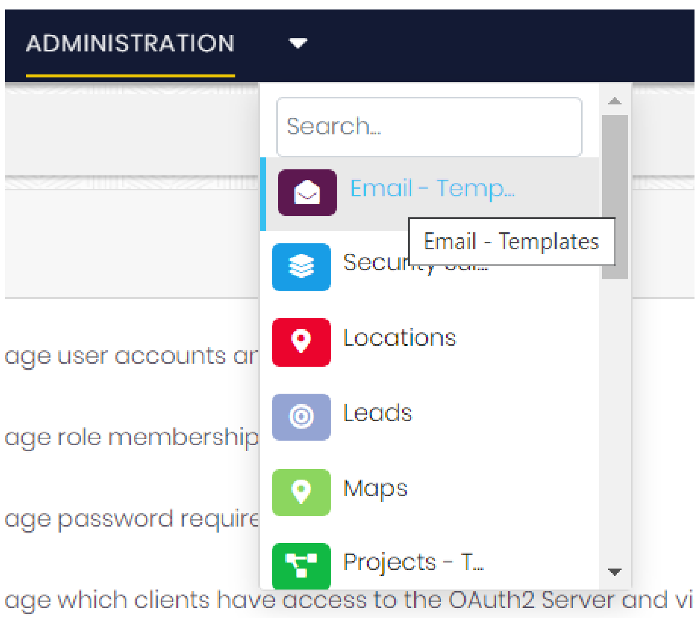
- To delete one or multiple Calls, you can select multiple records from the List View and click delete. You can also delete a Call from the Detail View by clicking the Delete button. For a more detailed guide on deleting records, see the Deleting Records section of this user guide.
- To view the details of a Call, click the Call Subject in the List View. This will open the record in Detail View.
- To track all changes to audited fields, in the Call record, you can click the View Change Log button on the Call Detail View or Edit View.

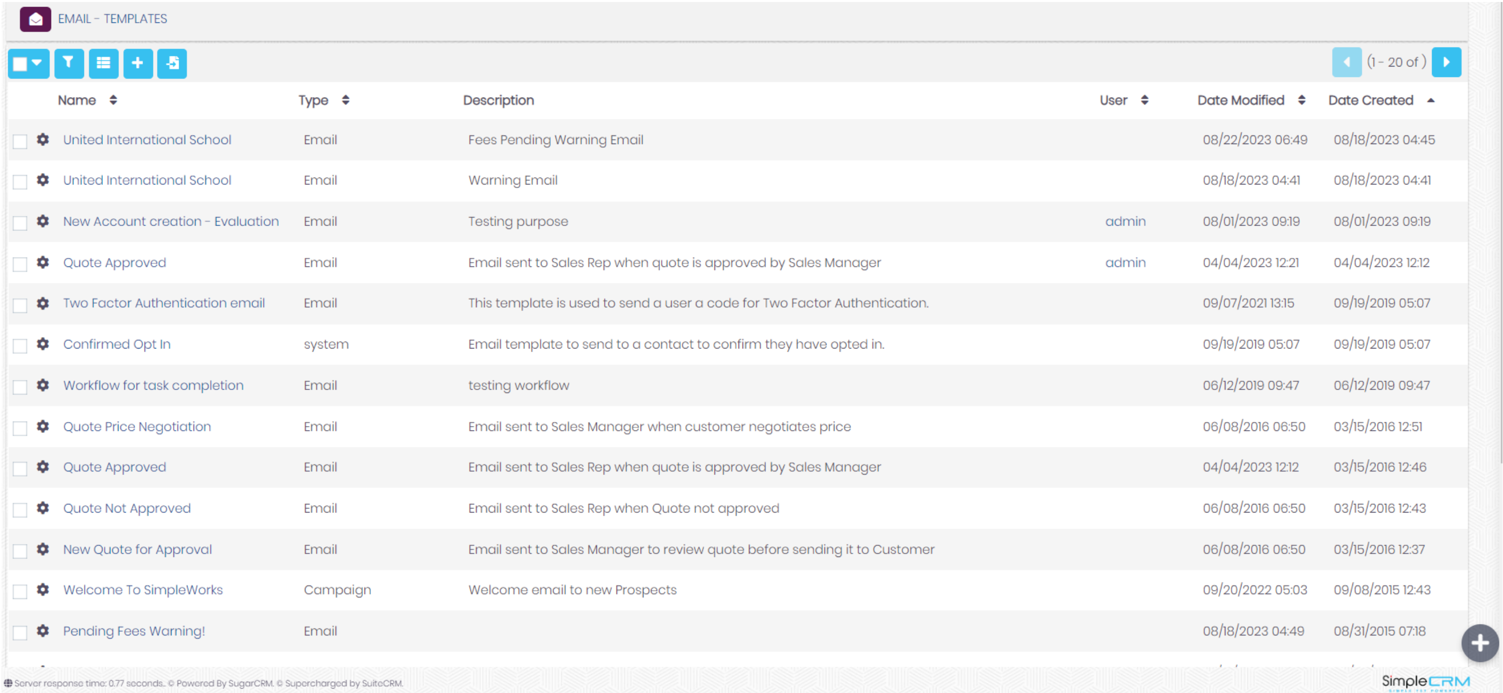
4.5. Email Templates

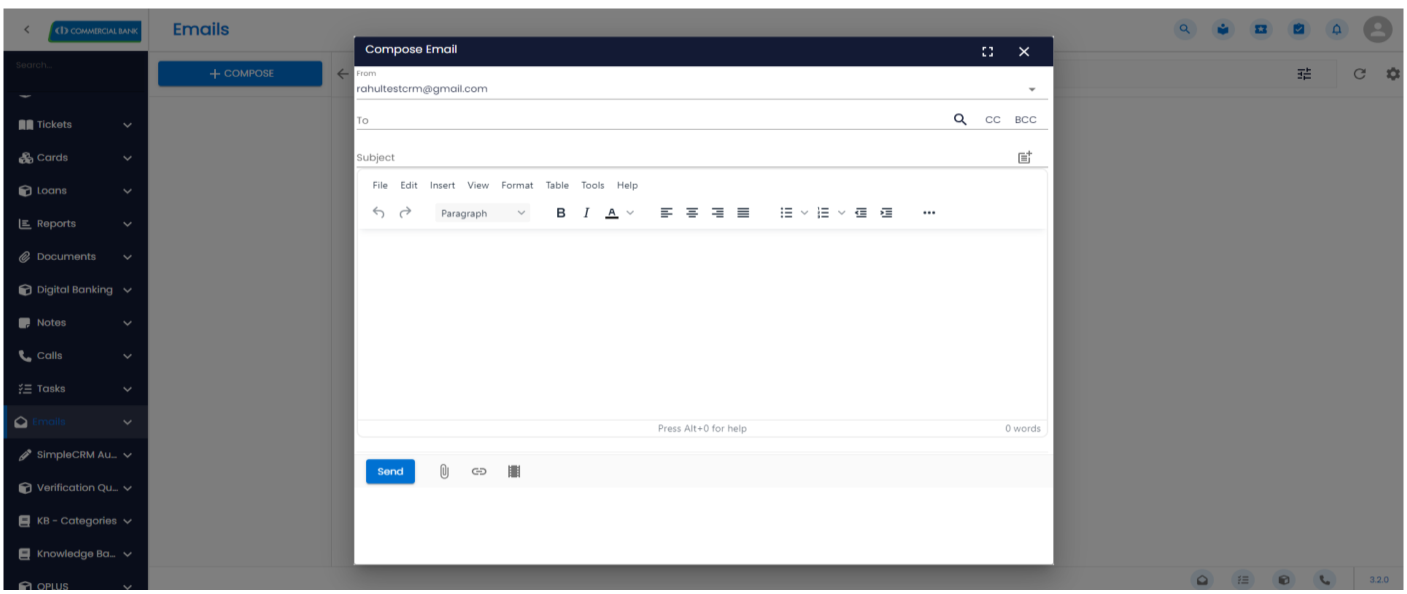
4.5.1. Overview

Email templates are used to send standardized responses and notifications via email. Adding variables allows you to personalize these communications and include additional relevant information such as order details.

Email templates can be viewed, edited and created from the Email Templates module which can be found on the ALL menu. Alternatively, templates can be created by the user directly from the workflow and campaigns modules.







There are a number of default System templates which are created on install. These are used to send out system notifications such as new passwords or case updates. These can be viewed and edited here alongside user-generated templates. Templates created here can also be used in Workflows and Campaigns for example, as well as for system notifications.

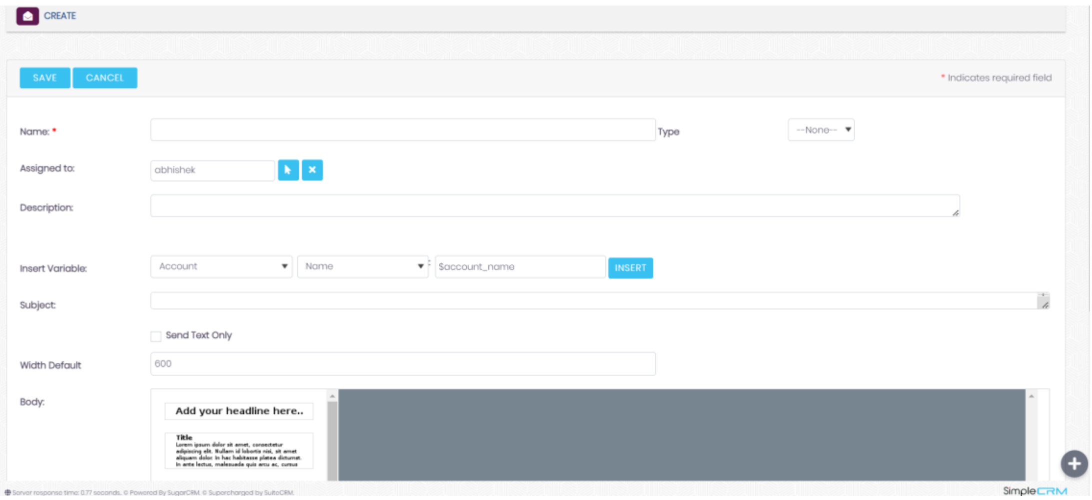
Click on a template name to view the template.

To edit an existing template, either open the template and select Edit from the Actions menu, or click the pencil icon to the left of the template name. Once in Edit mode, the template can be edited in the same way as creating a template.

4.5.2. Creating an Email Template

Select Create Email Template from the sidebar. This Create view will also appear if you choose to create a template from within another module such as Workflows, for example.

Select Email, Campaign or System depending on the use for the template. System templates are used to send system generated notifications such as case updates.

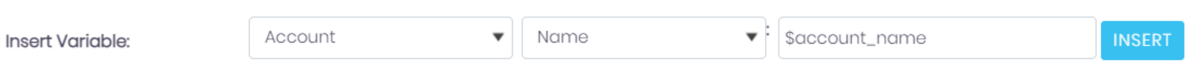


4.5.3. Body

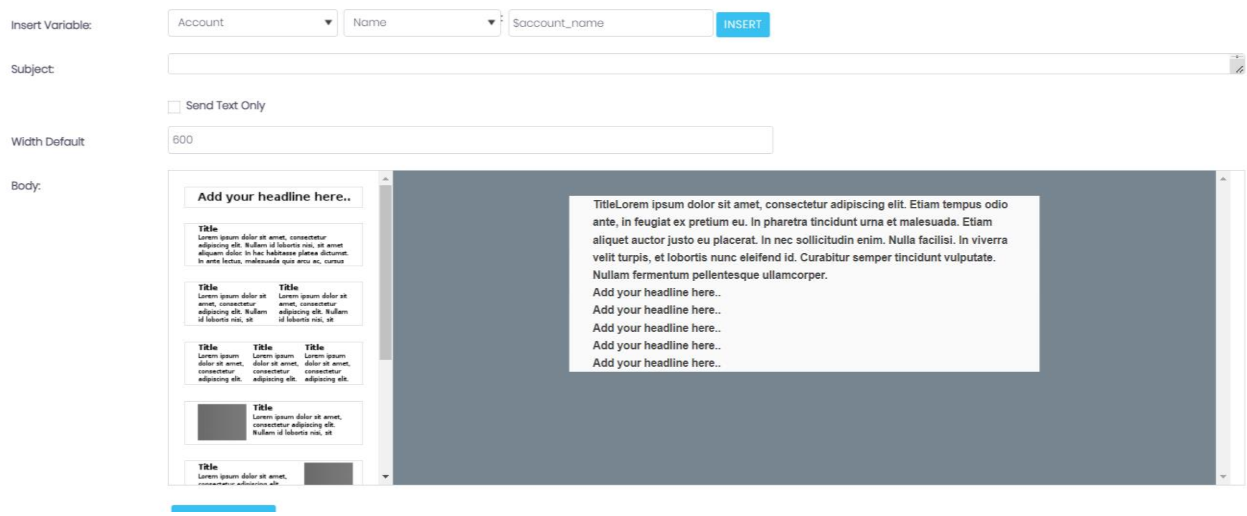
To add text to the body of the template, click, drag and drop one of the layouts from the selection in the left-hand pane into the body. You can add as many layout sections as required. Overwrite the demo text by first highlighting it.

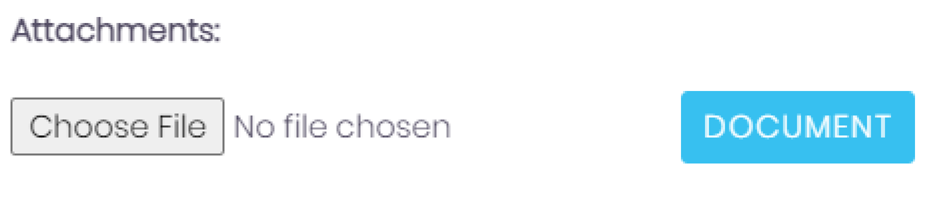
4.5.4. Adding Variables

To add a variable, select the appropriate module and field name from the drop-down lists. The corresponding variable name will be displayed in the last field.



You can either enter this variable manually, or click **INSERT** to insert the variable at the cursor point. Variables can be added to the subject line as well as the body of the email template.





Click **Choose File** to attach an external file or **DOCUMENT** to attach a SimpleCRM document to the template. Further items can be attached in the same way. The attached file(s) will be sent to all recipients of the template

4.5.5. Security Groups

Restrict access to a template by selecting a Security Group.

4.6. Tasks

SimpleCRM can assist Users with productivity, offering a way to record, relate and assign Tasks and to-do items that require action.

Tasks Actions - You can access the Tasks actions from the Tasks module menu drop down or via the Sidebar. The Tasks actions are as follows:

Create Task – A new form is opened in Edit View to allow you to create a new Task record.

View Tasks – Redirects you to the List View for the Tasks module. This allows you to search and list Task records.

Import Tasks – Redirects you to the Import Wizard for the Tasks module. For more information, see Importing Records.

To view the full list of fields available when creating a Task, See Tasks Field List.

Managing Tasks

- To sort records on the Tasks List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Task, see the Search section of this user guide.
- To update some or all of the Task on the List View, use the Mass Update panel as described in the Mass Updating Records section of this user guide.
- To duplicate a Task, you can click the Duplicate button on the Detail View and then save the duplicate record.
- To close a Task, click on the 'x' icon on the Tasks List View. You can also close a Task by clicking the Close button on the Detail View of a Task. You can also click the Close and Create New button. This will close the Task you are viewing and redirect you to the Edit View to create a new record.
- To delete one or multiple Tasks, you can select multiple records from the List View and click delete. You can also delete a Task from the Detail View by clicking the Delete button. For a more detailed guide on deleting records, see the Deleting Records section of this user guide.
- To view the details of a Task, click the Task Subject in the List View. This will open the record in Detail View.
- To edit the Task details, click the Edit icon within the List View or click the edit button on the Detail View, make the necessary changes, and click Save.
- For a detailed guide on importing and exporting Tasks, see the Importing Records and Exporting Records sections of this user guide.
- To track all changes to audited fields, in the Task record, you can click the View Change Log button on the Task's Detail View or Edit View.

4.7. Notes

The Notes module in SimpleCRM can be used to keep a record of any comments, observations or explanations that a User may have relating internally to their organization or relating to another SimpleCRM record such as an Account, Contact, Lead or many more. Notes are also used to keep record of interactions with Customers regarding Cases and Bugs.

Notes Actions - You can access the Notes actions from the Notes module menu drop down or via the Sidebar. The Notes actions are as follows:

Create Note or Attachment – A new form is opened in Edit View to allow you to create a new Note record (with attachment).

View Notes – Redirects you to the List View for the Notes module. This allows you to search and list Note records.

Import Notes – Redirects you will be taken to the Import Wizard for the Notes module. For more information, see Importing Records.

To view the full list of fields available when creating a Note, See Notes Field List.

Managing Notes

- To sort records on the Notes List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Note, see the Search section of this user guide.
- To update some or all the Notes on the List View, use the Mass Update panel as described in the Mass Updating Records section of this user guide.
- To duplicate a Note, you can click the Duplicate button on the Detail View and then save the duplicate record.
- To delete one or multiple Notes, you can select multiple records from the List View and click delete. You can also delete a Note from the Detail View by clicking the Delete button. For a more detailed guide on deleting records, see the Deleting Records section of this user guide.
- To view the details of a Note, click the Note Subject in the List View. This will open the record in Detail View.
- To edit the Note details, click the Edit icon within the List View or click the edit button on the Detail View, make the necessary changes, and click Save.
- For a detailed guide on importing and exporting Notes, see the Importing Records and Exporting Records sections of this user guide.
- To track all changes to audited fields, in the Note record, you can click the View Change Log button on the Note's Detail View or Edit View.

4.8. Tickets

In SimpleCRM Tickets are used to record interactions with Customers when they ask for help or advice, for example in a Support or Service function. A Ticket can be created, updated when a User is working on it, assigned to a colleague and closed when resolved. At each stage of the Ticket the User can track and update the incoming and outgoing conversation thread so a clear record of what has occurred is registered in the CRM. Tickets can be related to individual records such as Customers, Account, Digital Banking, Cards, Loans.

Tickets Actions - You can access the Tickets actions from the Tickets module menu drop down or via the Sidebar. The tickets actions are as follows:

Create Ticket – A new form is opened in Edit View to allow you to create a new ticket.

View Ticket – Redirects you to the List View for the tickets module. This allows you to search and list ticket records.

Import Ticket – Redirects you to the Import Wizard for the tickets module. For more information, see Importing Records.

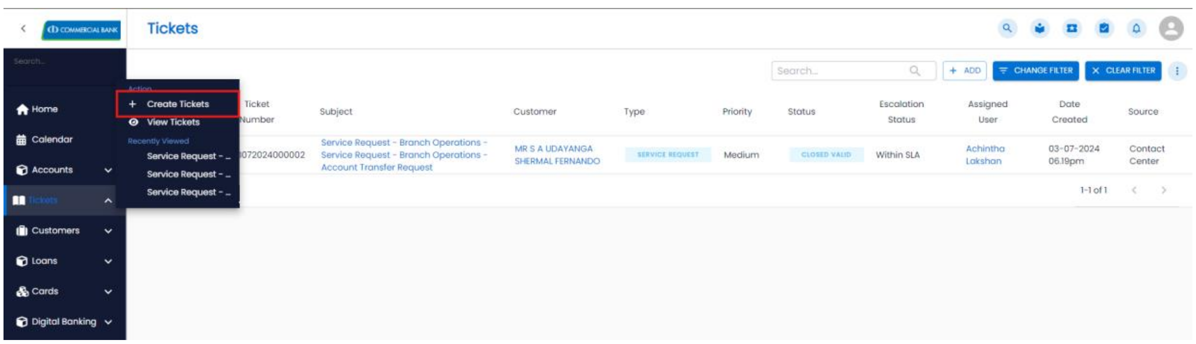
To view the full list of fields available when creating tickets, See tickets Field List.

Advanced functionality for tickets can be found in the tickets with Portal section of this User Guide.

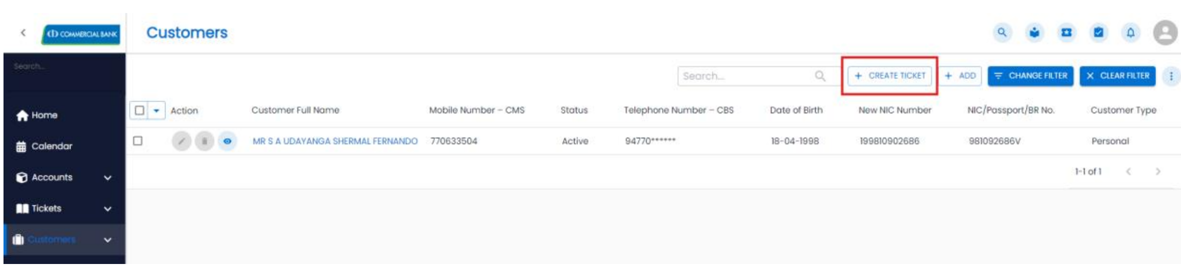
Managing Ticket

- A new ticket can be created in following ways,

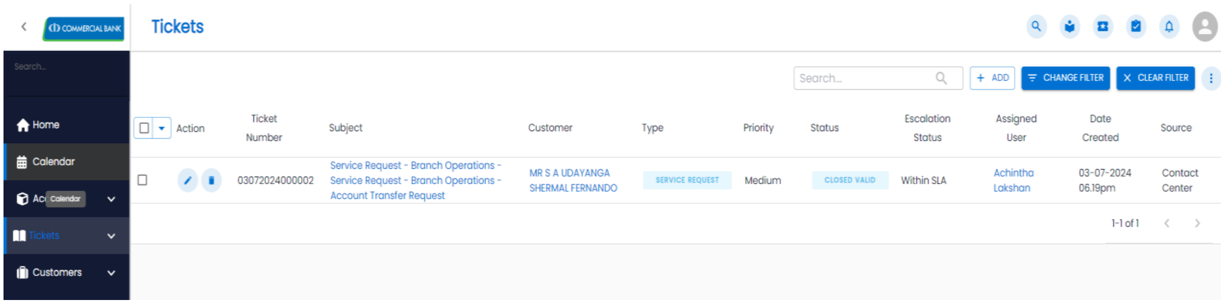
1. using **"+ Create Tickets"**, from the navigation menu as shown in the below screenshot



2. from the Customers module using the "**+ Create Ticket**" button present at the top right corner,



3. from the Tickets module using the **"+Add"** button,



4. from the **Customer 360, using the "+" button.**

- While creating a new ticket, the "Status" field is by default selected to "New".
- When the "Assignment Overrule" checkbox is checked, it is mandatory to add the "Business Unit".
- The "First call Resolution" field is used for the tickets which are resolved on call by the customer support executive, and the "Status" field is by default selected to "Closed Valid".
- "Assignment Overrule" is mandatory to add if the ticket is created manually through the tickets module. If one creates a ticket from Customer 360, it's not mandatory to add the "Assignment Overrule" field unless it is required.
- Select the "Type" of the ticket followed by "Category", "Product Services", "Nature" and "Subject".
- For a ticket which is created from Customer 360, "Subject" will get fetched automatically.
- If a ticket is to be created against a particular customer then select the required customer within the customer relate field, once the customer is selected, all the other fields such as Accounts, Cards, Loans and Digital Banking will automatically get freezed.

  If a ticket needs to be created against an account, then select the required account under the accounts related field and all the other fields such as Customer, Cards, Loan and Digital Banking will automatically get freezed.

  The same procedure needs to be followed for creating tickets against Cards or Loans or Digital Banking.
- To make a ticket "Confidential", the user needs to select the "Confidential Checkbox", which will mark the ticket as confidential and will be displayed only to the users assigned under Confidential group.
- To sort records on the tickets List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a ticket, see the Search section of this user guide.

- To update some or all the tickets on the List View, use the Mass Update panel as described in the Mass Updating Records section of this user guide.
- To duplicate a ticket, you can click the Duplicate button on the Detail View and then save the duplicate record.
- To merge duplicate tickets, select the records from the tickets List View, click the Merge link in the Actions drop-down list, and progress through the merge process. For more information on Merging Duplicates, see the Merging Records section of this user guide.
- To delete one or multiple tickets, you can select multiple records from the List View and click delete. You can also delete a ticket from the Detail View by clicking the Delete button. For a more detailed guide on deleting records, see the Deleting Records section of this user guide.
- To view the details of a ticket, click the ticket Subject in the List View. This will open the record in Detail View.
- To edit the ticket details, click the Edit icon within the List View or click the edit button on the Detail View, make the necessary changes, and click Save.
- For a detailed guide on importing and exporting tickets, see the Importing Records and Exporting Records sections of this user guide.
- To track all changes to audited fields, in the ticket record, you can click the View Change Log button on the ticket's Detail View or Edit View.

There are certain Ticket Assignment Logics that are applied while creating a ticket which is explained in the below section in detail.
Ticket Assignment Process Based on Specific Criteria:

Role and Security Group Assignment:

Tickets are assigned to a branch and a unique user based on specific combinations of type, subtype, service, and nature. To facilitate this, a dedicated role is created, and the user is included in a designated security group.

Branch-Specific Assignment Example:

If the ticket pertains to a specific branch, such as the Akuressa branch, the system will assign the ticket to the Executive Officer of that branch.

Handling Unknown Branch and Account Number:

In cases where the agent is unaware of the branch or account number:
The "Assignment Overrule" option is selected.
The business unit is then chosen.

The ticket assignment follows the same logic as mentioned above: it is directed to the appropriate branch and unique user based on type, subtype, service, and nature.

Confidential Ticket Assignment:

When a ticket is marked as confidential, it will be assigned to the Confidential Security Group.

4.9. Meetings

Like the Calls module, the Meetings module in SimpleCRM allows Users to create a record of any Meeting that they have been involved in. The Meeting scheduler allows a User to invite attendees, email invitees, set reminders, reschedule, and relate to other modules including an Account, Contact, Project, and many other Objects. This module has many more helpful functions that assist the User to plan and organize their Meetings.

Meetings Actions - You can access the Meetings actions from the Meetings module menu drop down or via the Sidebar. The Meetings actions are as follows:

Schedule Meeting – A new form is opened in Edit View to allow you to create a new Meeting record.

View Meetings – Redirects you to the List View for the Meetings module. This allows you to search and list Meeting records.

Import Meetings – Redirects you to the Import Wizard for the Meetings module. For more information, see Importing Records.

To view the full list of fields available when creating and scheduling a Meeting, See the Meetings Field List.

Managing Meetings

- To sort records on the Meetings List View, click any column title that is sortable. This will sort the column either ascending or descending.
- To search for a Meeting, see the Search section of this user guide.
- To update some or all of the Meetings on the List View, use the Mass Update panel as described in the Mass Updating Records section of this user guide.
- To duplicate a Meeting, you can click the Duplicate button on the Detail View and then save the duplicate record.
- To close a Meeting, click on the 'x' icon on the Meetings List View. You can also close a Meeting by clicking the Close button on the Detail View of a Meeting. You can also click the Close and Create New button. This will close the Meeting you are viewing and redirect you to the Edit View to create a new record.
- To Reschedule a Meeting, you can edit its Start Date & Time field. A practical way to do it is to double-click to inline-edit the directly from the Detail View of a Meeting.[1]
- To delete one or multiple Meetings, you can select multiple records from the List View and click delete. You can also delete a Meeting from the Detail View by clicking the Delete button. For a more detailed guide on deleting records, see the Deleting Records section of this user guide.
- To view the details of a Meeting, click the Meeting Subject in the List View. This will open the record in Detail View.
- To edit the Meeting details, click the Edit icon within the List View or click the edit button on the Detail View, make the necessary changes, and click Save.
- For a detailed guide on importing and exporting Meeting, see the Import and Export Importing Records and Exporting Records sections of this user guide.
- To track all changes to audited fields, in the Meeting record, you can click the View Change Log button on the Meeting’s Detail View or Edit View.

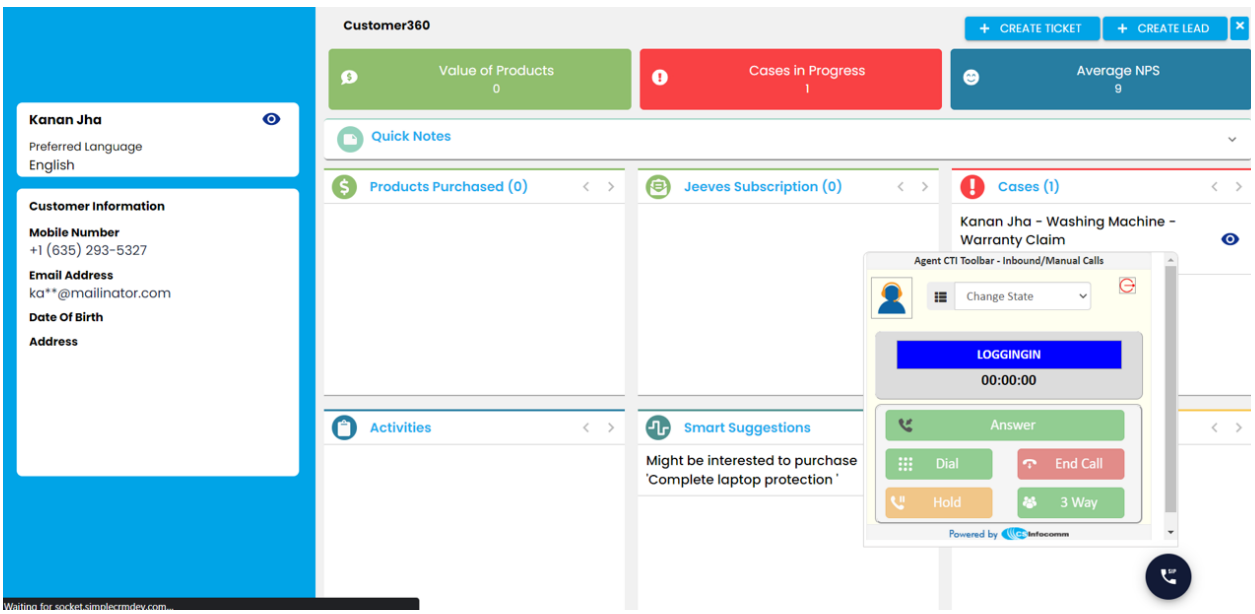
5. Support Automation

Support automation, or customer support automation, is the use of automation to streamline your support-related workflows end-to-end. These automations can be geared towards improving the customer experience or the employee experience.

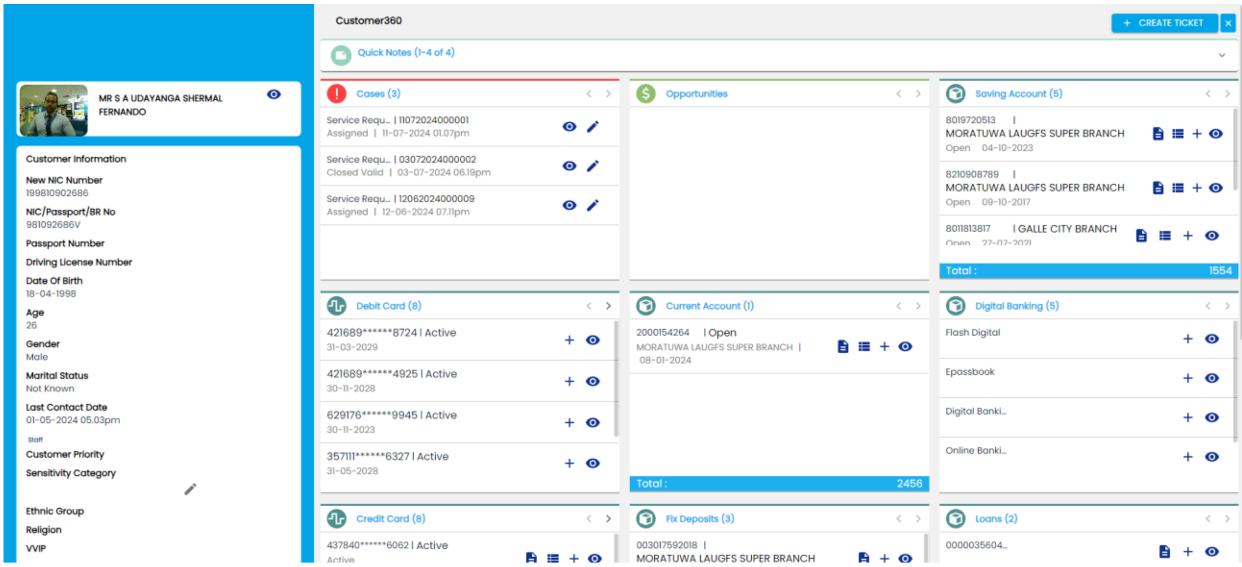
Support automation can be instrumental when -

- Customer is trying to call you (customer executive) through his/her registered mobile number

With the help of this dashboard integration the customer executive can resolve the cases or can answer the questions asked by the customers. The executive will be able to view the customer 360 view at the time of call and can do various activities.

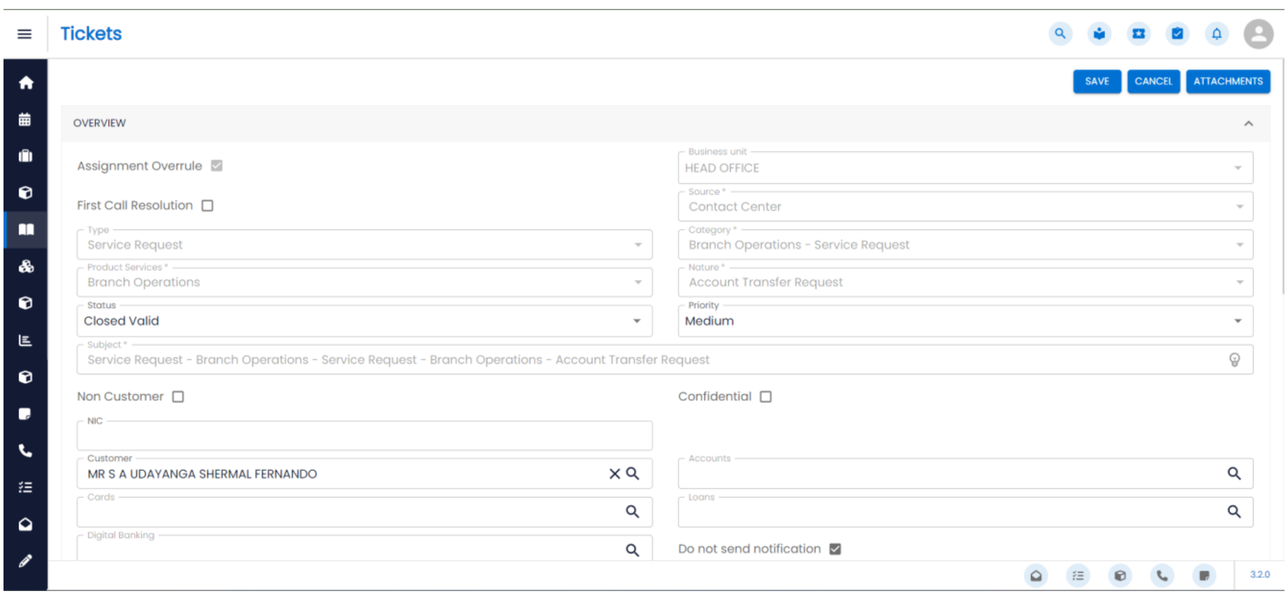


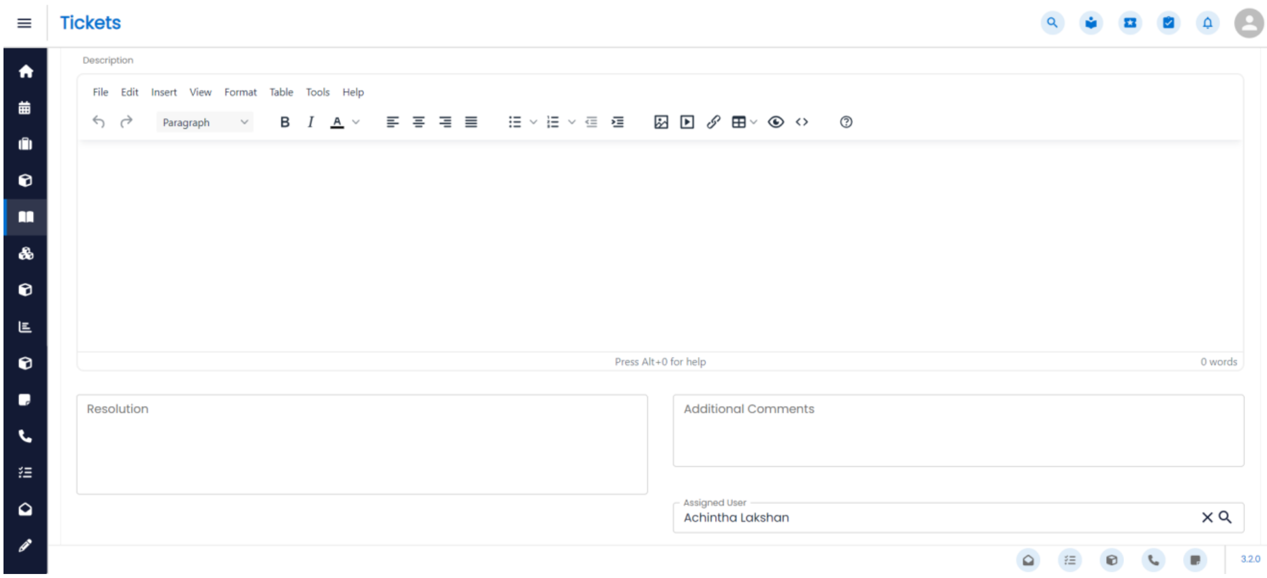
Whenever the customer calls, the above type of dialer Pop-up will be visible to the executive and all the data related to the customer will be fetched in customer 360 from the Commercial Bank Database. Here, the customer executive can create a case based on the concern raised by the customer through a call.



The executive will be able to fill all the information asked by the system to create a new case for the customer.

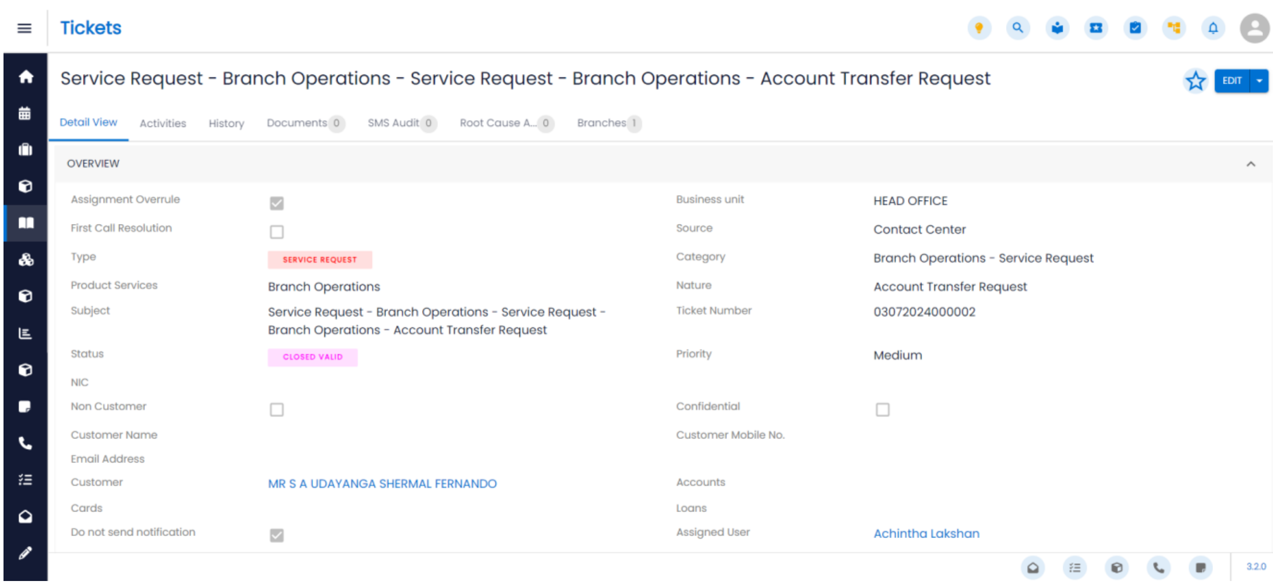
The case number will be fetched automatically as well as the customer's name.



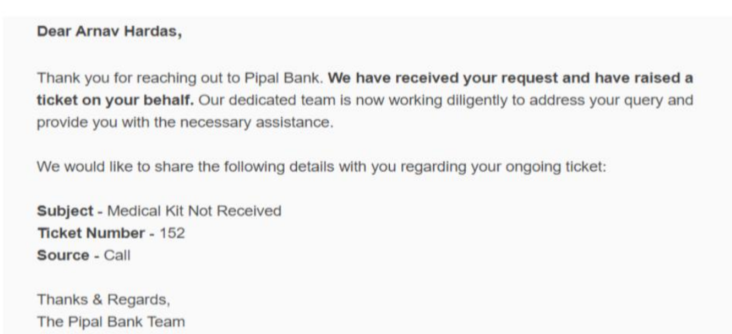


The description as well as the subject help CRM to get to know the sentiment of the customer.

The user can save it and view the detailed view of the customer's case.



After the case is created the customer will receive the email for the same. The following sample email you can refer -


Dear Arnav Hardas,

Thank you for reaching out to Pipal Bank. **We have received your request and have raised a ticket on your behalf.** Our dedicated team is now working diligently to address your query and provide you with the necessary assistance.

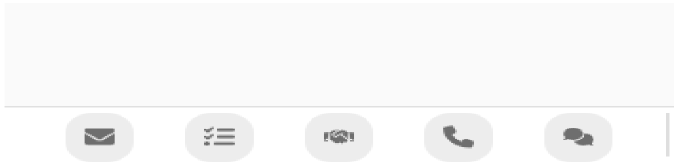
We would like to share the following details with you regarding your ongoing ticket:

Subject - Medical Kit Not Received
Ticket Number - 152
Source - Call

Thanks & Regards,
The Pipal Bank Team

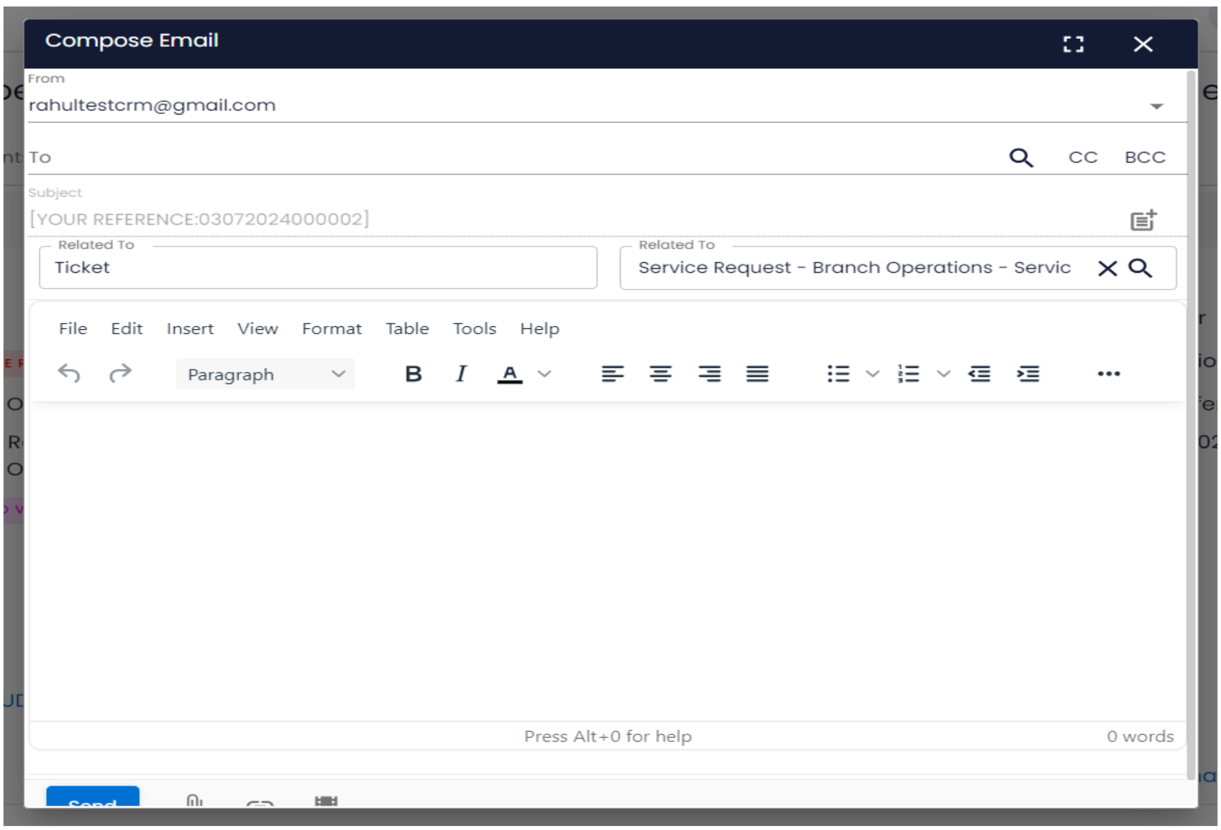
5.1. Activities (Quick Create)

The executive can perform various activities to further communication with the customer. The executive can use the below taskbar -

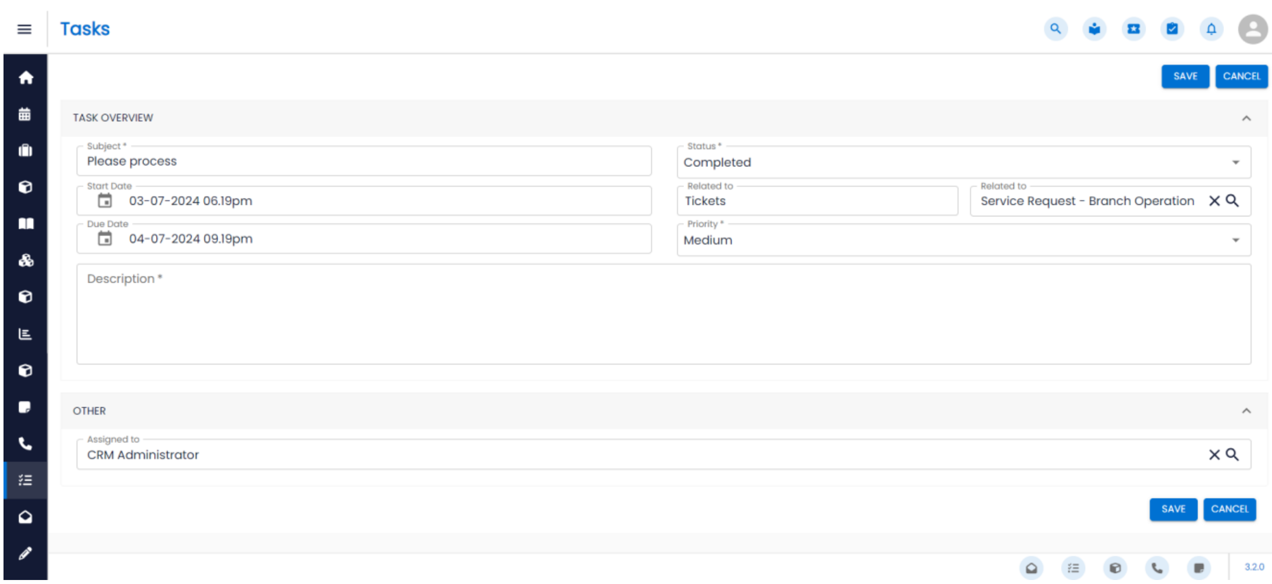


EMAIL TASK MEETING CALL NOTES

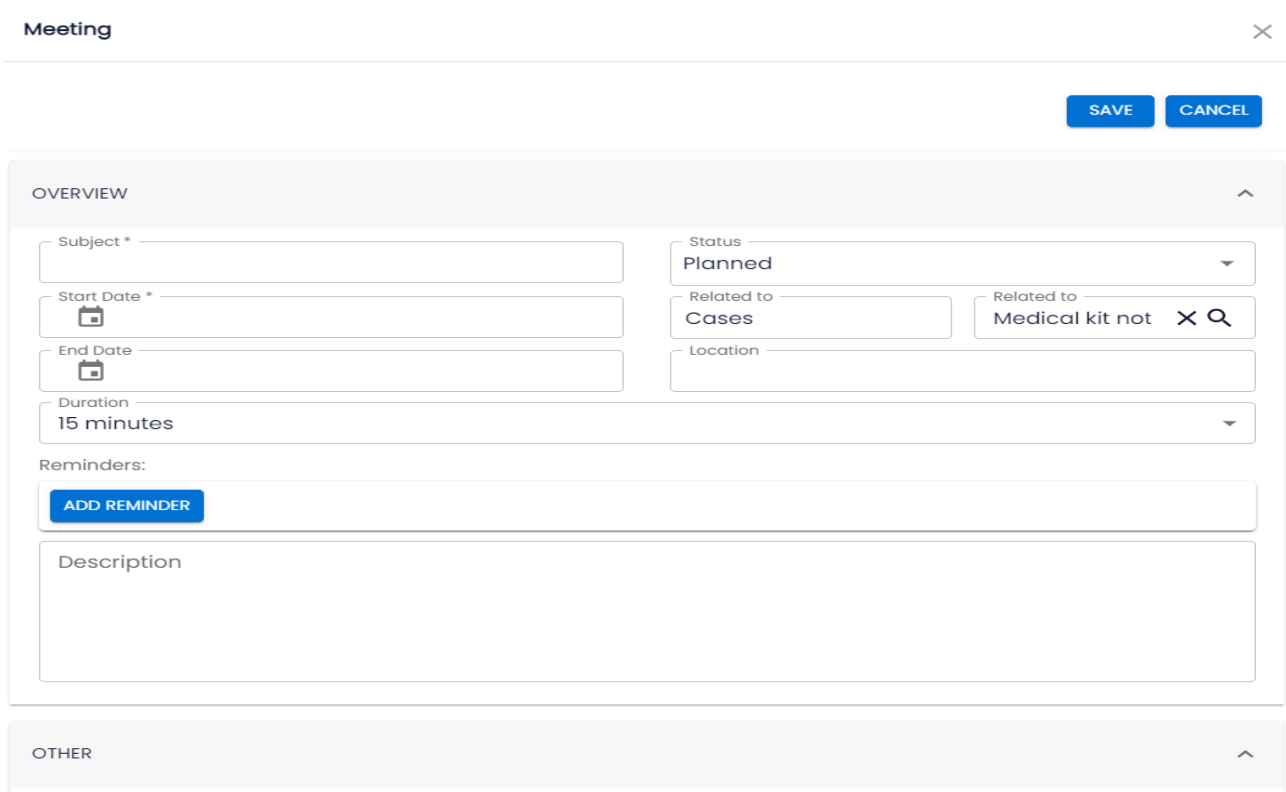
1. **Email** - The executive can send the email to customer from here



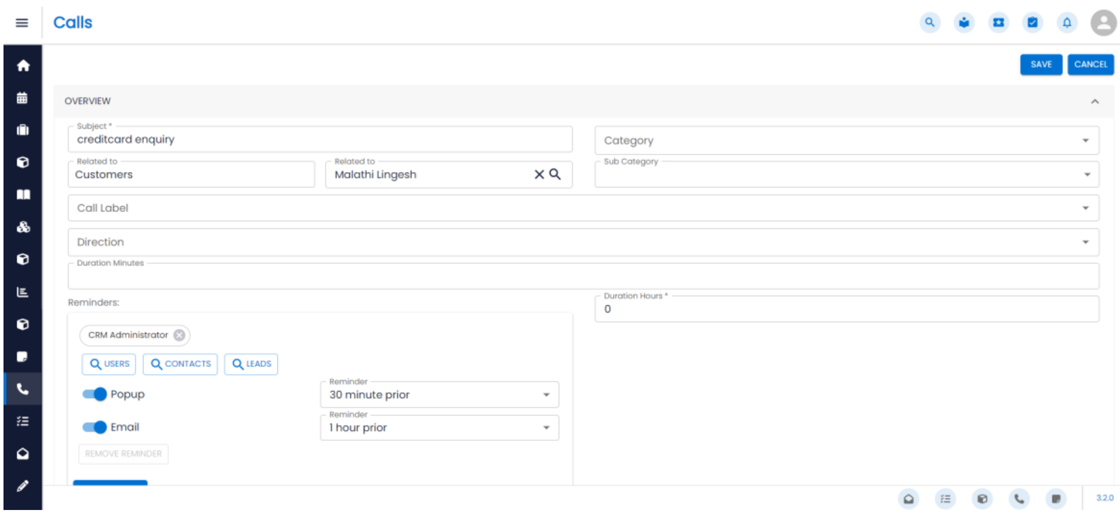
2. **Task** - The executive can also add a task or assign it to any concerned user.



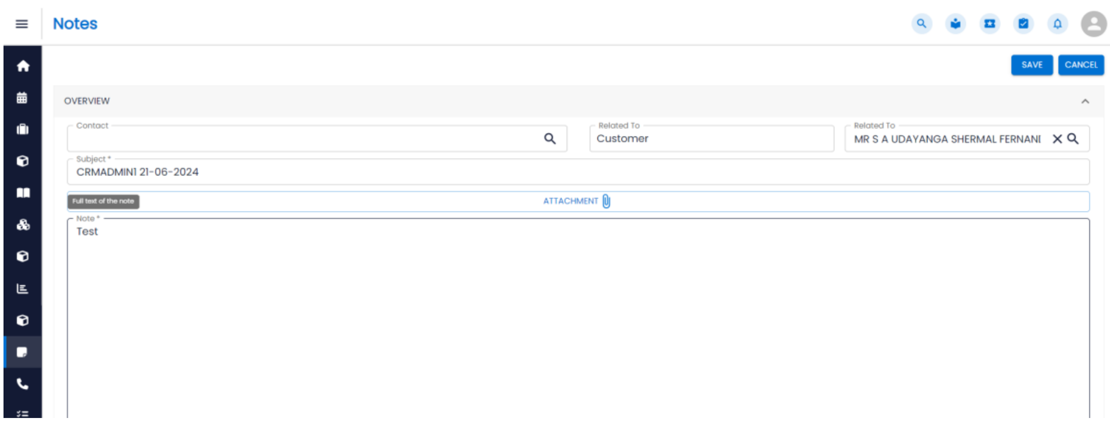
3. **Meeting** - The executive can create a meeting through this option.

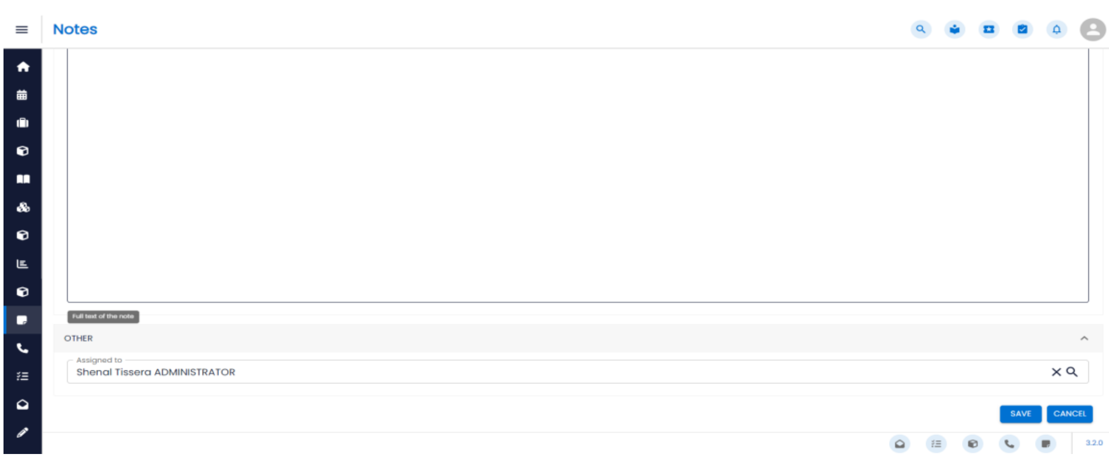


4. **Calls** - The executive can sue this option to plan a call



5. **Notes** - The executive can save the notes by using this option here.

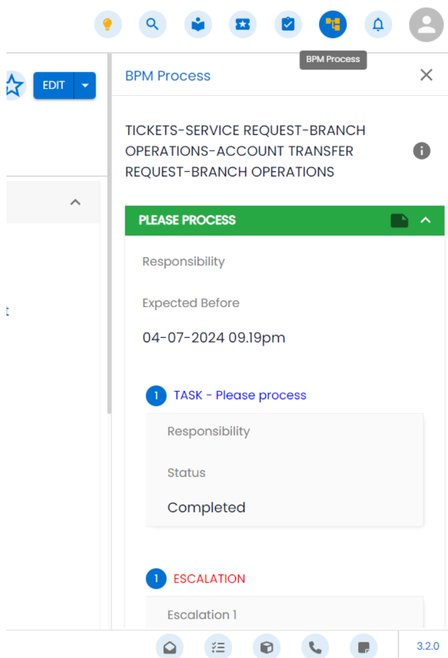


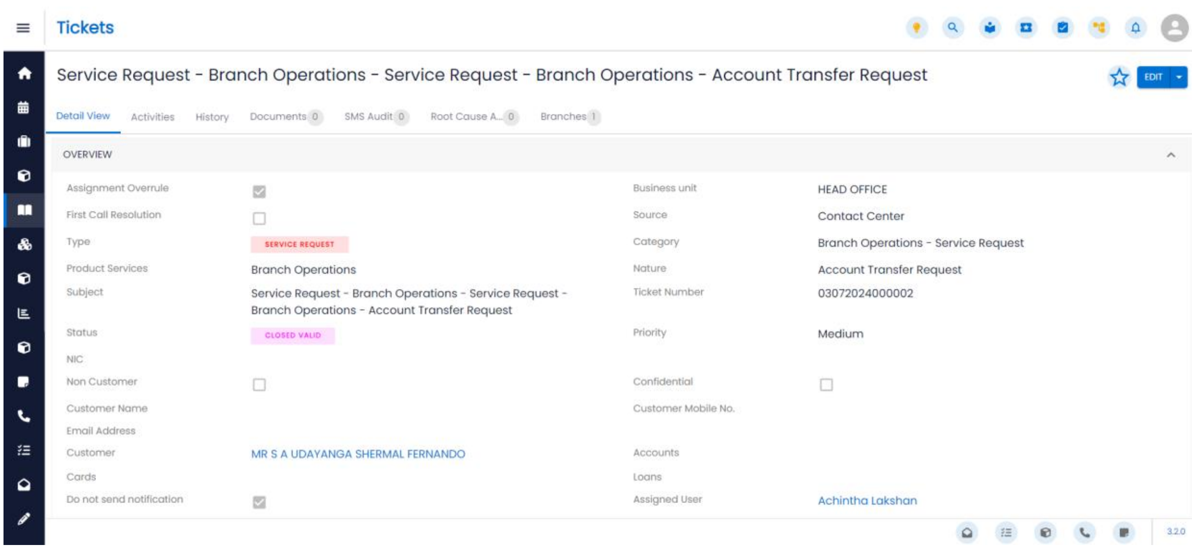


5.2. BPM in Support

To work on resolving the issue, the users can do the task assigned to them as per the BPM setup. After clicking on this BPM Icon, the executive will be able to view the further tasks.

BPM Process





After all the tasks have been performed by all the responsible users and status of this case will be closed, then the customer will receive the following email

So this is how the customer support will be used effortlessly and to automate the process.

The above process was for the case wherein the customer executive received the call from the customer.

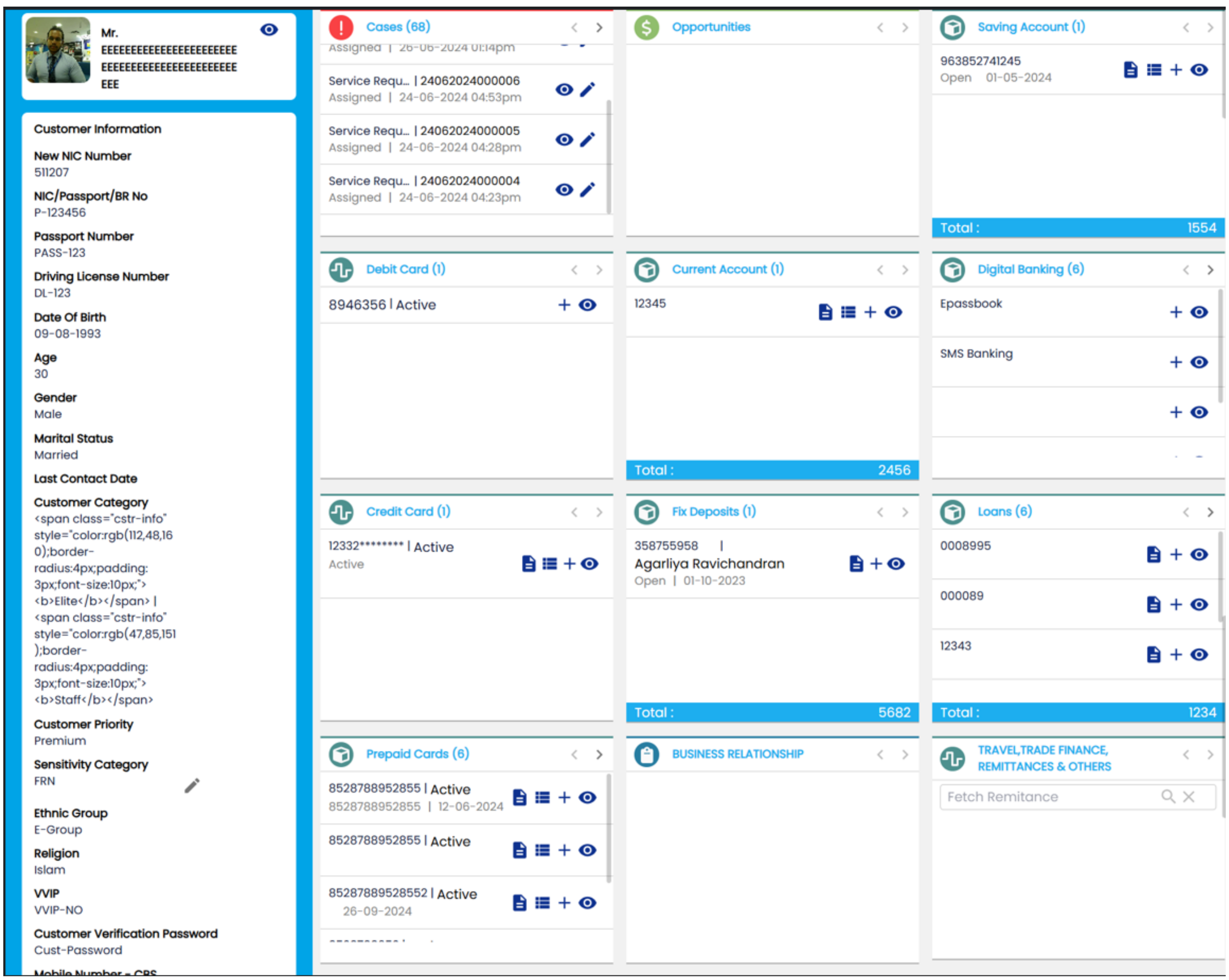
But in other cases, if the customer sends the email or through social media for support, then it will automatically create the case/ticket and assign it to the concerned customer executive. The further process of resolving the case will be the same as per the conditions and concern.

5.3. Customer 360

The Customer 360 view offers detailed information on individual customers. To access it, navigate to the customers module and click the "eye" icon next to a specific record in the list view. This action directs you to the comprehensive Customer 360 interface, where information tiles are displayed according to specific requirements, as shown in the accompanying screenshot.

These tiles provide a holistic overview of customer details fetched directly from the Combank Database via Talend Jobs. This integration ensures that all relevant information is readily accessible, facilitating informed decision-making and efficient customer relationship management.

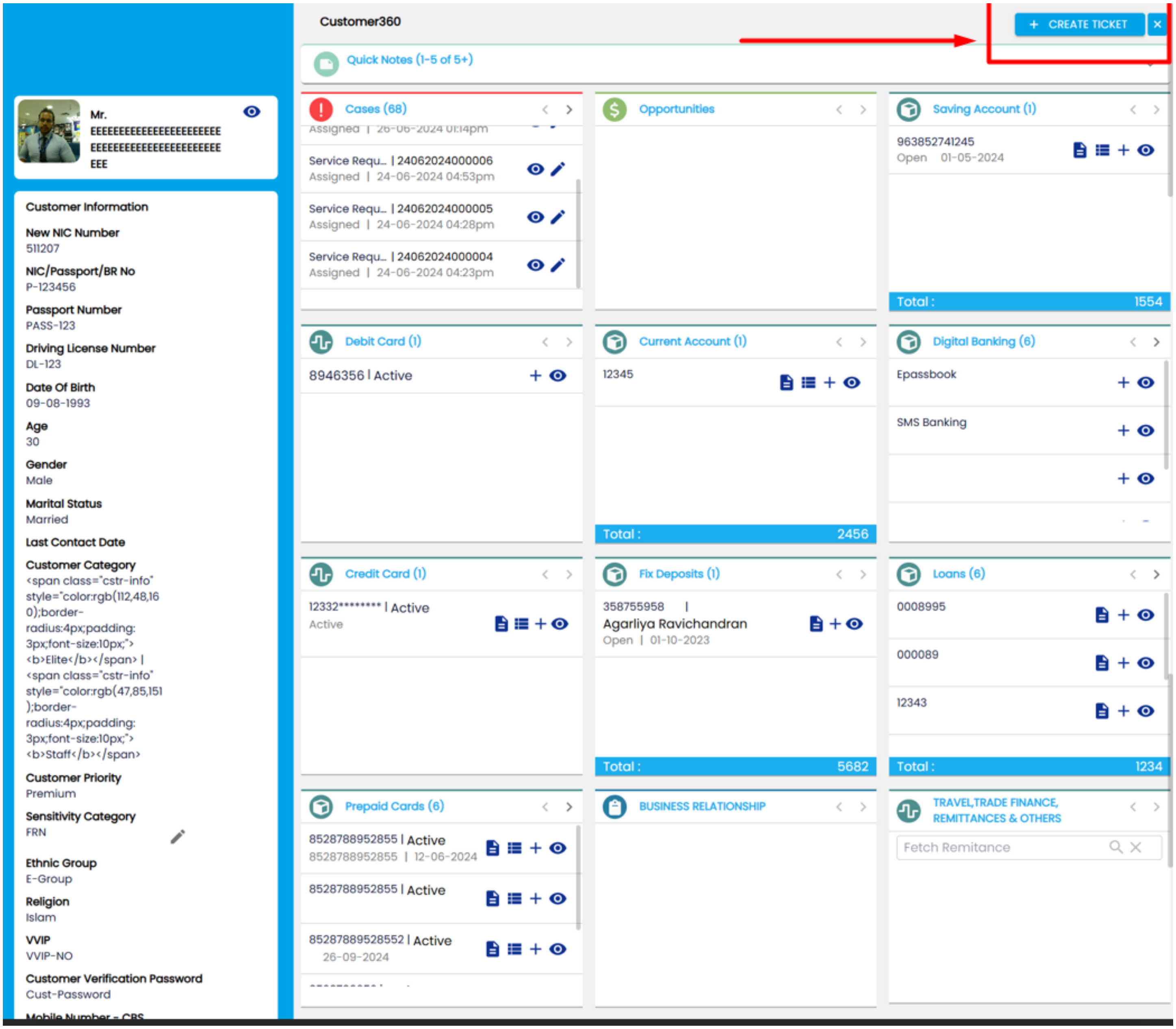
For further details on navigating and utilizing the Customer 360 view, please refer to the image below



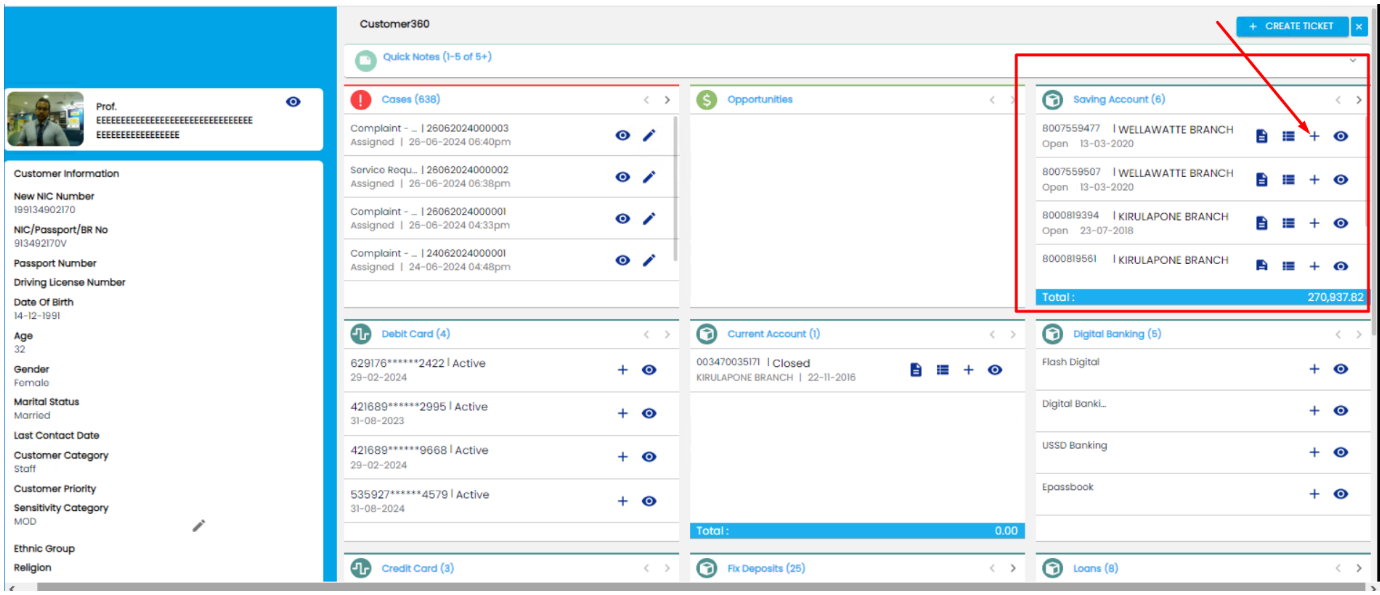
Note: We are fetching the Customer's related data, only for the Accounts, Cards, Loans, Digital Banking, QPlus modules on Customer 360 and so have restricted the create access for these modules.

5.3.1. Ticket Creation using Customer 360-

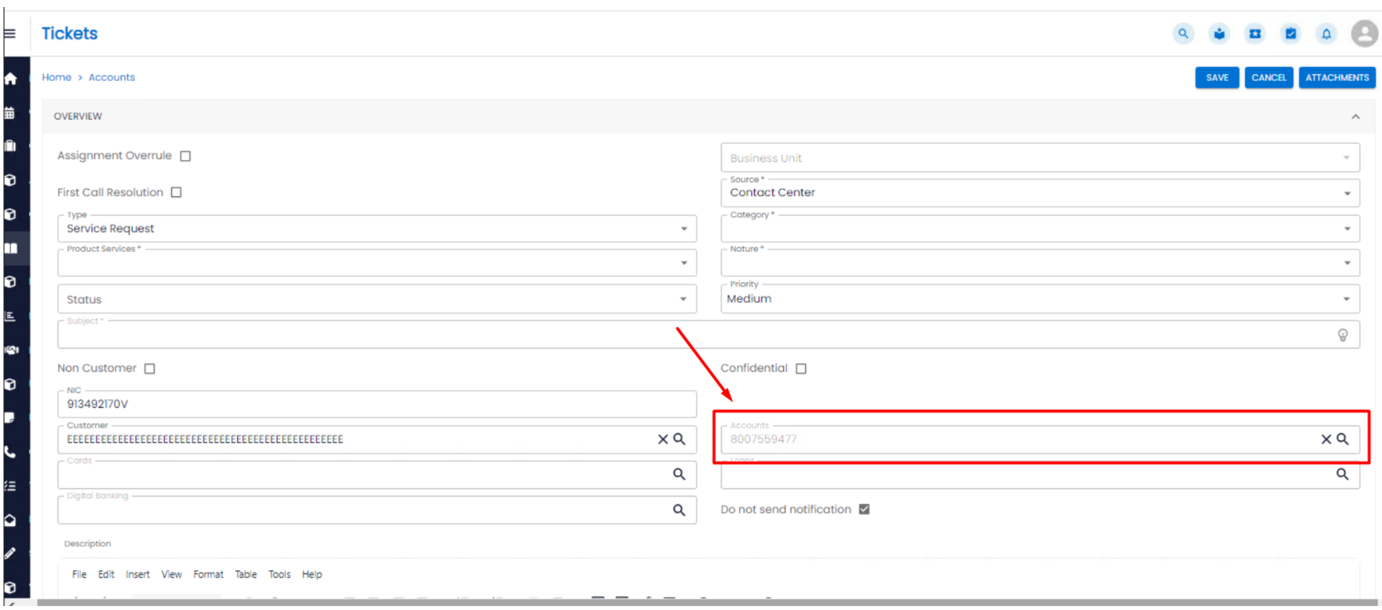
The "Create Ticket" button, situated at the top right corner of the page, empowers users to effortlessly generate tickets for individual customers, spanning various types.



Tickets against Account (Savings accounts, Current accounts and Fixed Deposits) can be created as shown below:

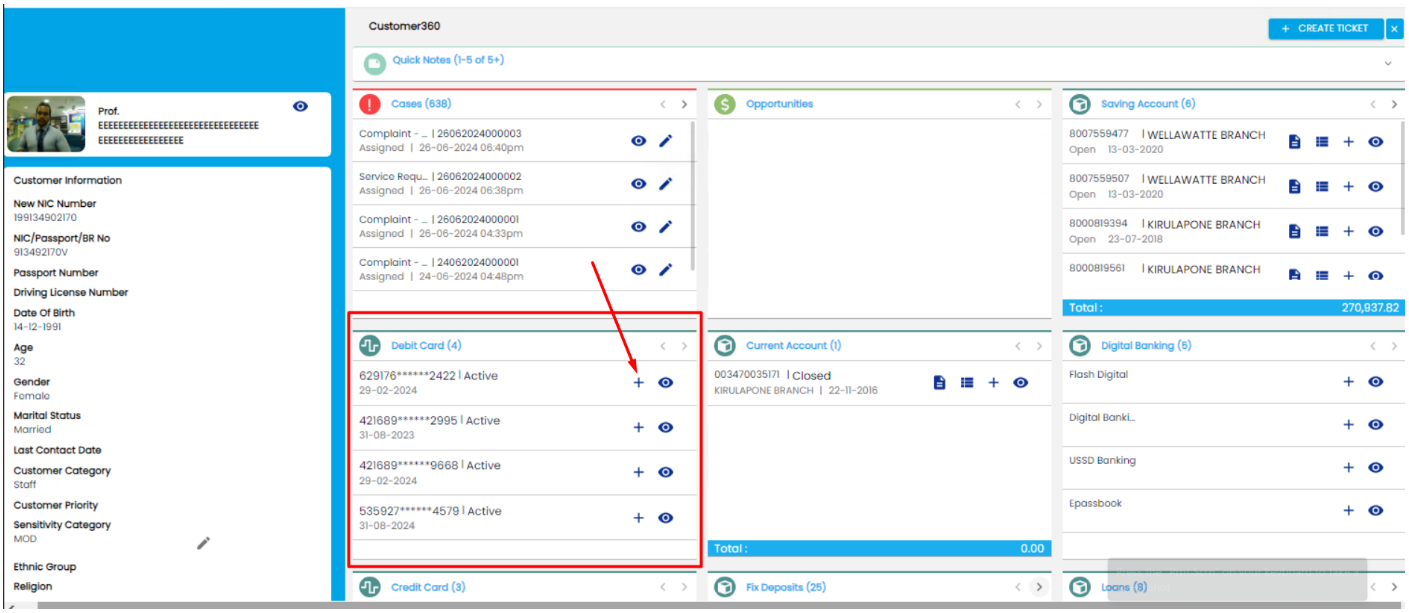


The Savings account number will be automatically fetched in the Accounts field as shown below:

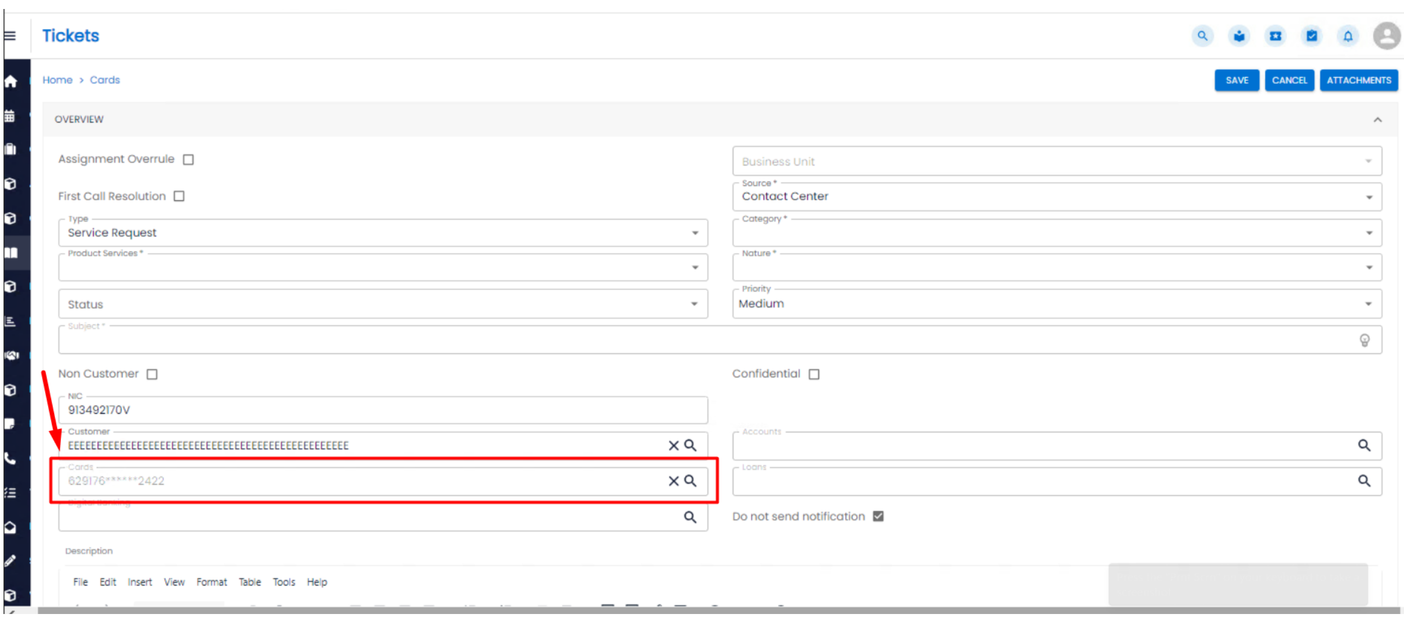


Similar procedures need to be followed for creating tickets against **Current accounts and Fixed Deposits** directly from the Customer 360.

Tickets against Cards (Debit cards, Credit cards, Prepaid cards) can be created as follows:

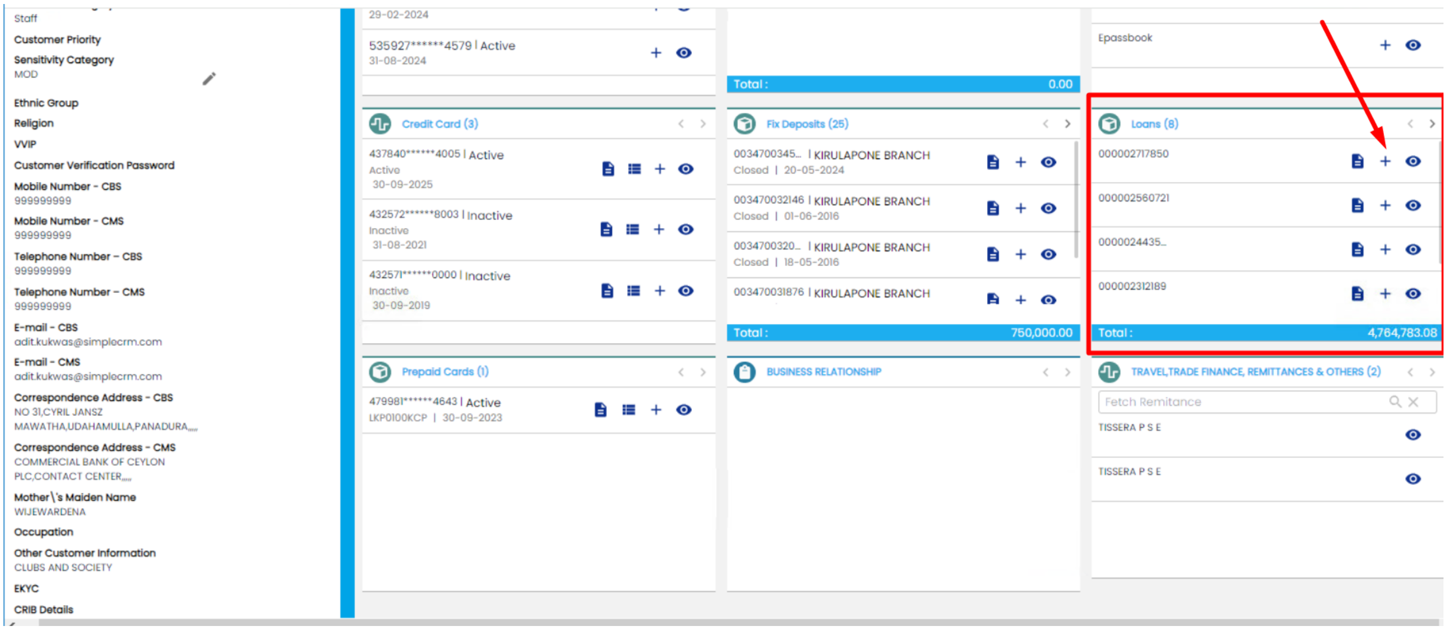


The Debit card number will be automatically fetched in the Cards field as shown below:

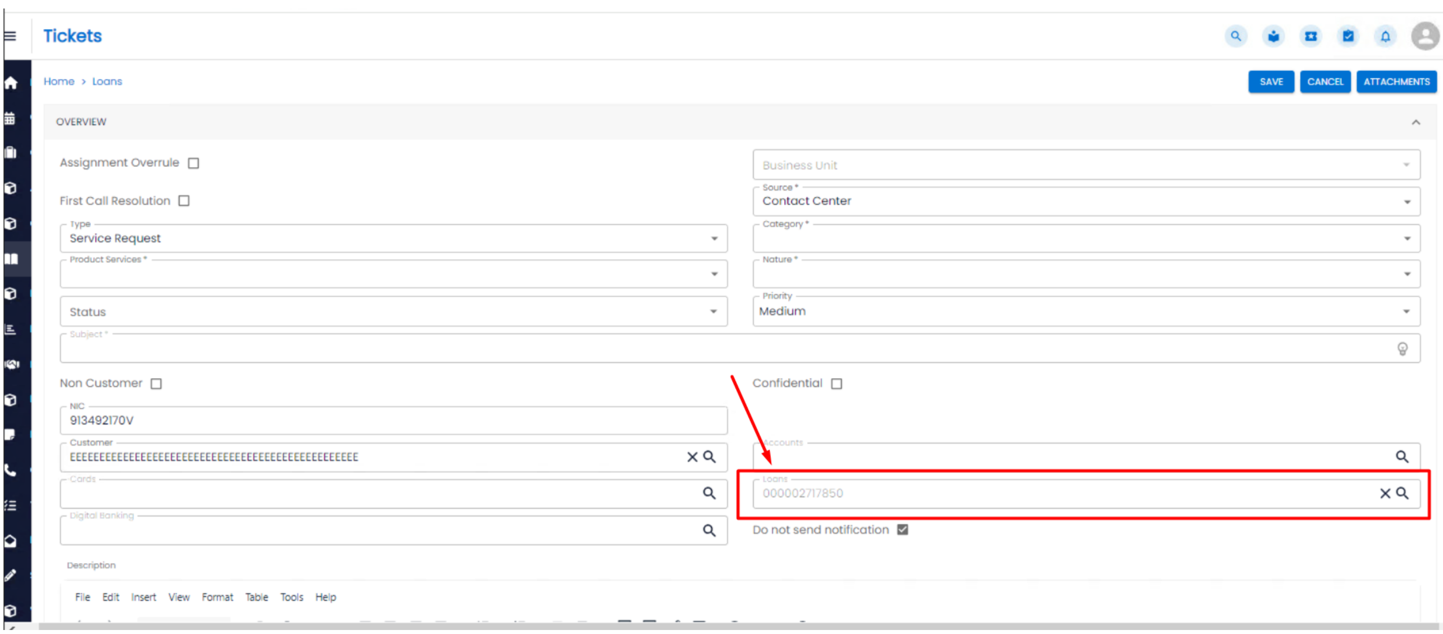


Similar procedures need to be followed for creating tickets against **Credit Cards and Prepaid cards** directly from the Customer 360.

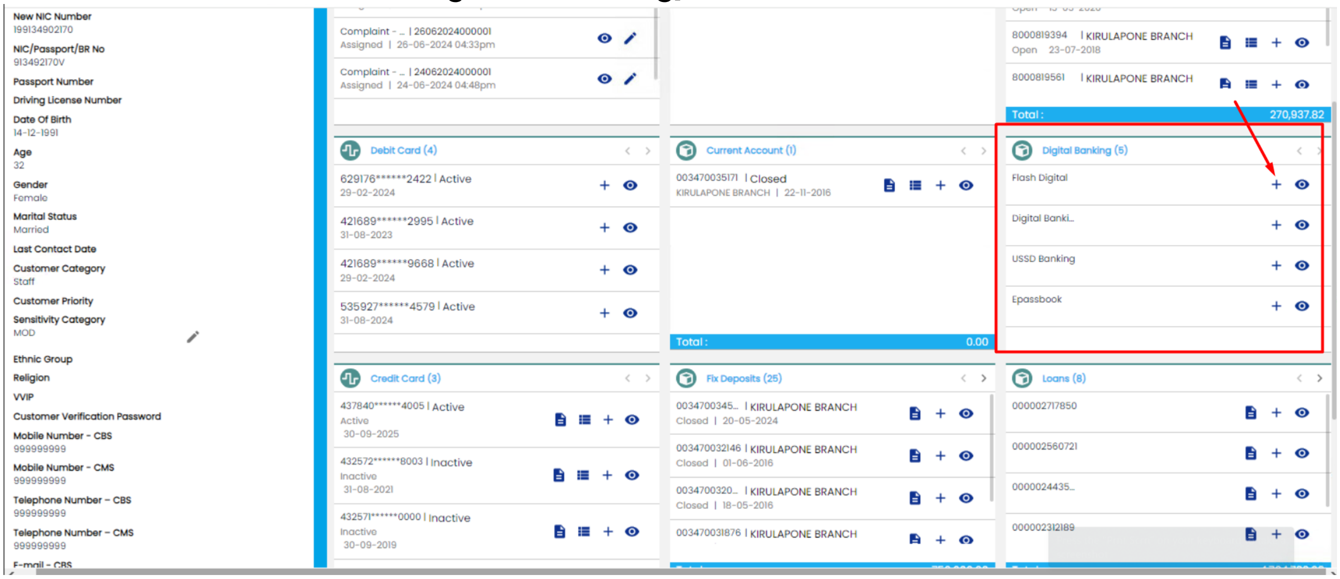
Tickets against Loans can be created as follows:



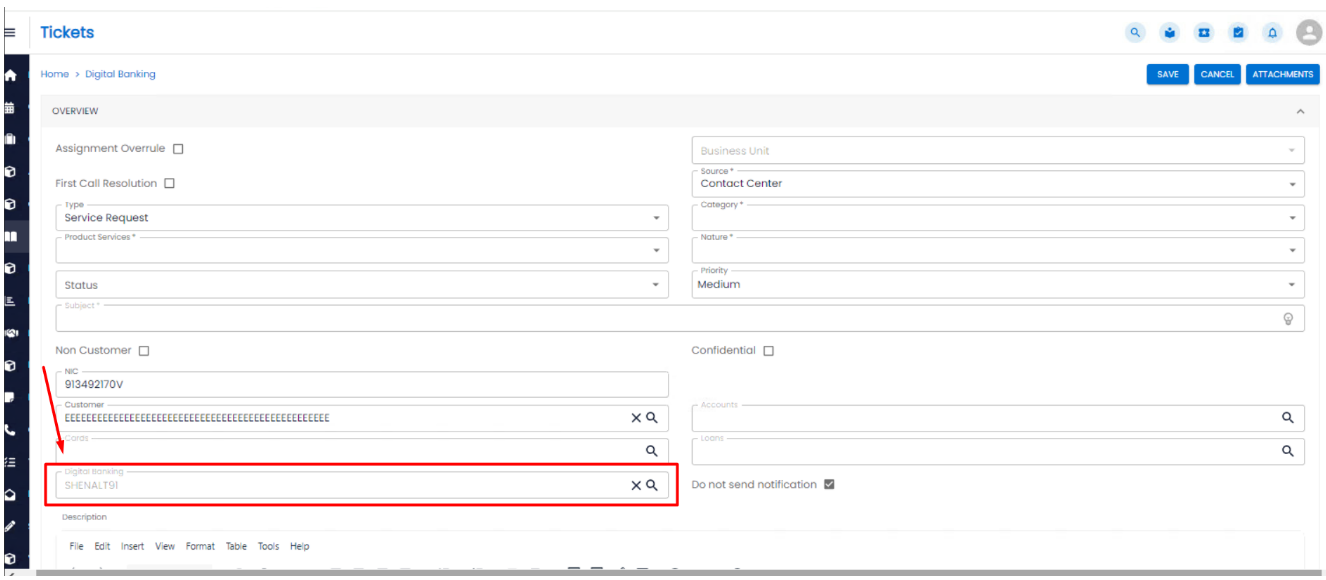
The Loan number will be automatically fetched in the Loans field as shown below:



Tickets against Digital Banking (Commbank Digital, Epassbook, Online Banking, Flash Digital, USSD Banking, SMS Banking) can be created as follows:

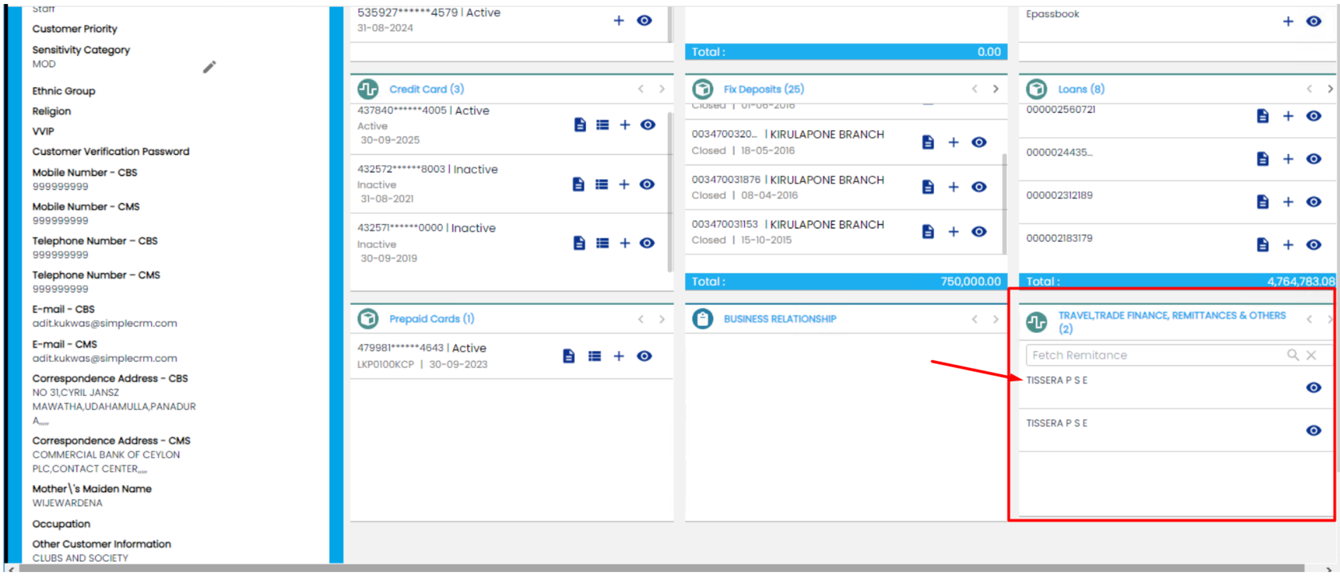


The Flash Digital name will be automatically fetched in the Digital Banking field as shown below:



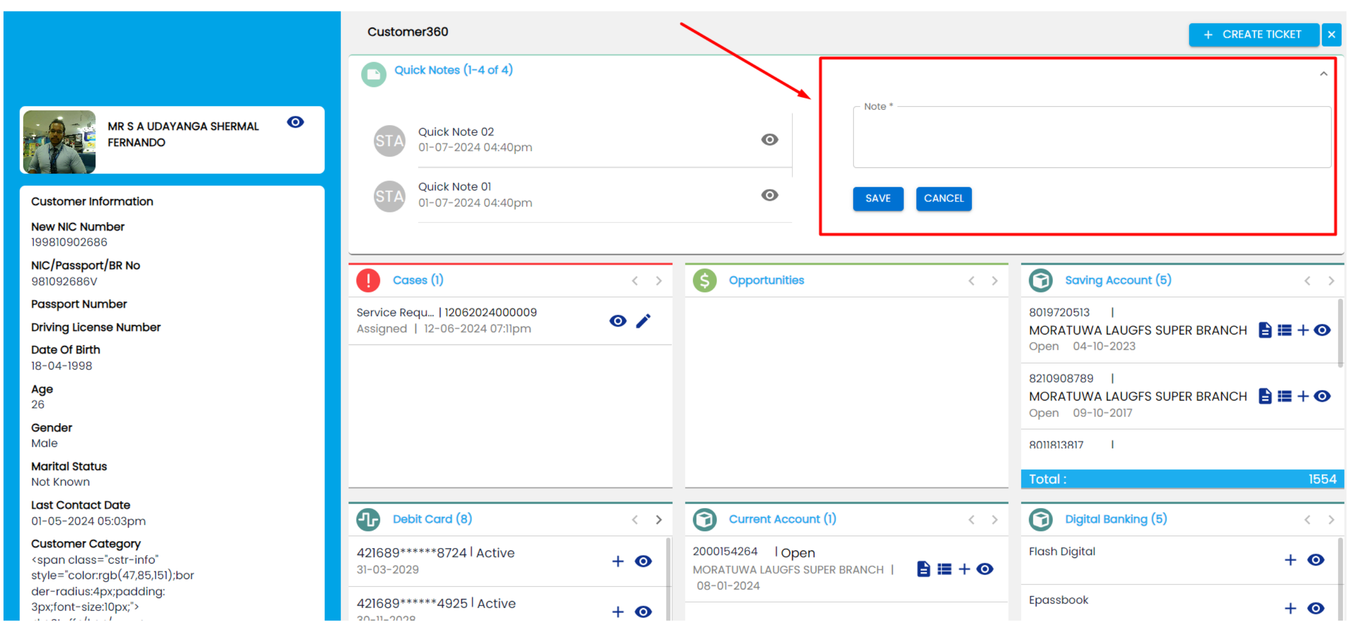
Similar procedures need to be followed for creating tickets against **Combank Digital, Epassbook, Online Banking, USSD Banking, SMS Banking** directly from the Customer 360.

If the Digital Banking has a type "Remittances", then it is shown under the Remittance Tile on Customer360:



5.3.2. Quick Notes -

- Users can take quick notes for a specific client simply by clicking on the "Quick Notes" tab. This convenient feature allows for the seamless creation of brief, concise remarks or reminders related to a particular client.



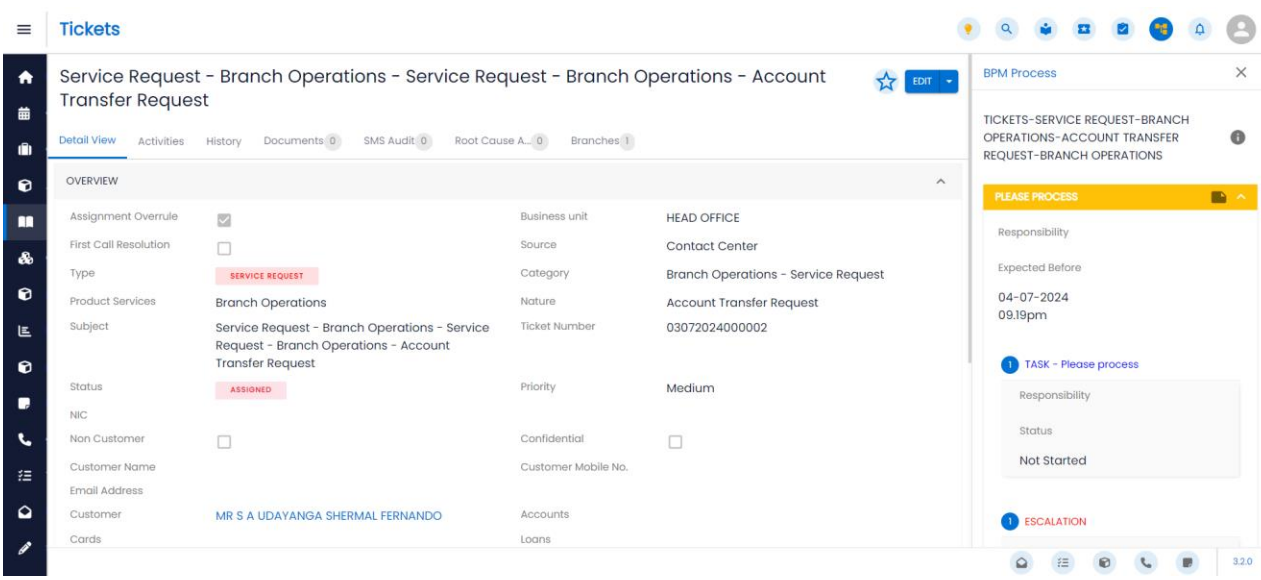
5.4. BPM Process (Front-End)

BPM is a Business Process Management tool utilized for automated workflows. BPM workflows are configured based on Nature of Ticket, Type and SubType. To check if there exists a BPM for a particular ticket, go to a ticket's detail view and click on the icon located at the top right corner as shown below, you will find a detailed explanation of one BPM workflow and its functioning. All other BPM workflows will be executed by following the same steps.

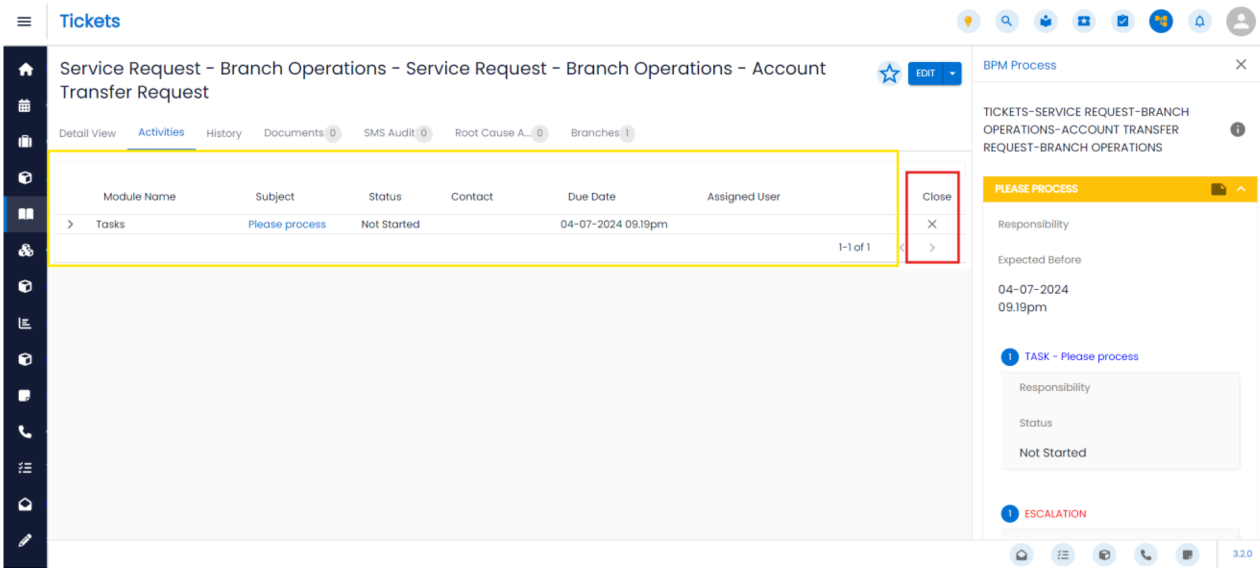
E.g. -

- For a Ticket with Nature as Service Request, Category Branch Operations - Service Request Product Services as Branch Operations and Nature as Account Transfer Request, the first step for the user is to process

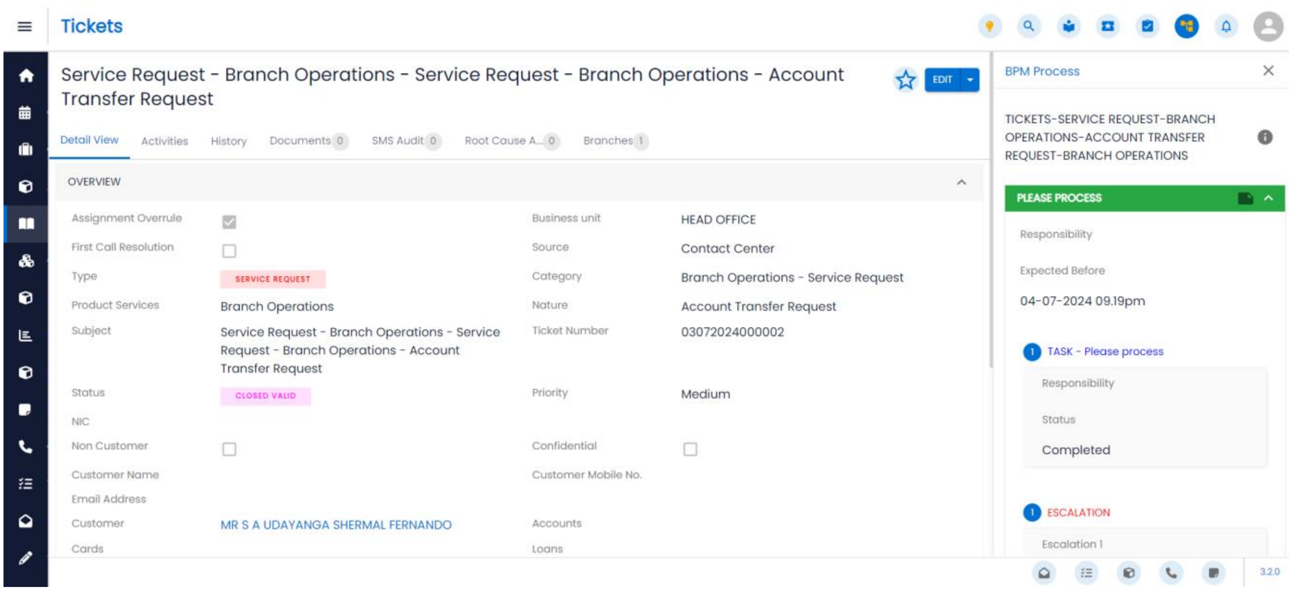
- As shown in the screenshot below, if the user fails to complete the task within the specified time, an escalation occurs, triggering an email notification to be sent to the user's reporting manager.



- Once the responsible user completes the task, they can mark it as closed from the Activities Subpanel. As soon as this step is completed the BPM will move ahead to the next step (Send to Customer).



- Now the BPM workflow will keep executing until all the tasks are completed by the respective users.
- The user on the other hand will have to follow the same steps to close the tasks.
- Once the BPM workflow is completed the ticket's status will change to "Closed".



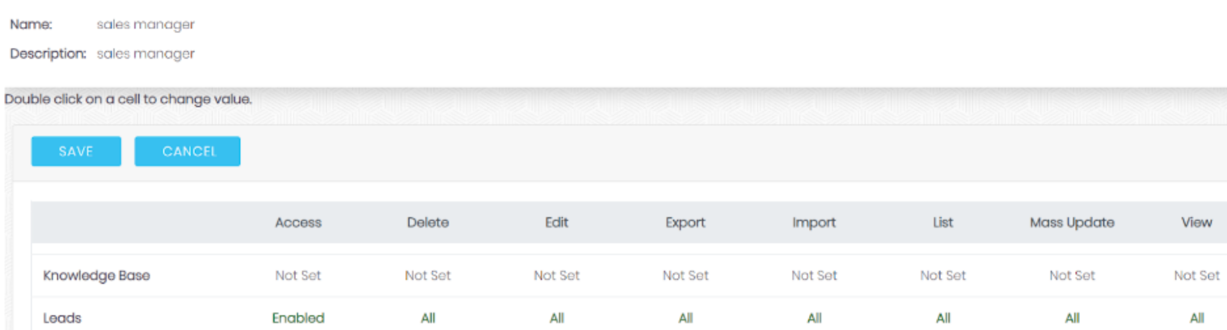
5.5. BPM Configuration: Setting Up BPM from the BPM Configurator (Back-End)

The steps outlined below will guide you in creating, configuring, and managing Business Process Management (BPM) within SimpleCRM. BPMs enable the automation and streamlining of your business processes, ensuring efficient task assignment, meeting deadlines, and managing workflow steps. This guide will help you establish customized BPMs aligned with your organization's specific requirements.

5.5.1. Prerequisites

1. Creation of Users & Roles Assignment: Before setting up a BPM, create users for employees and assign roles. Ensure that users have appropriate roles assigned and modules are enabled as per requirements.

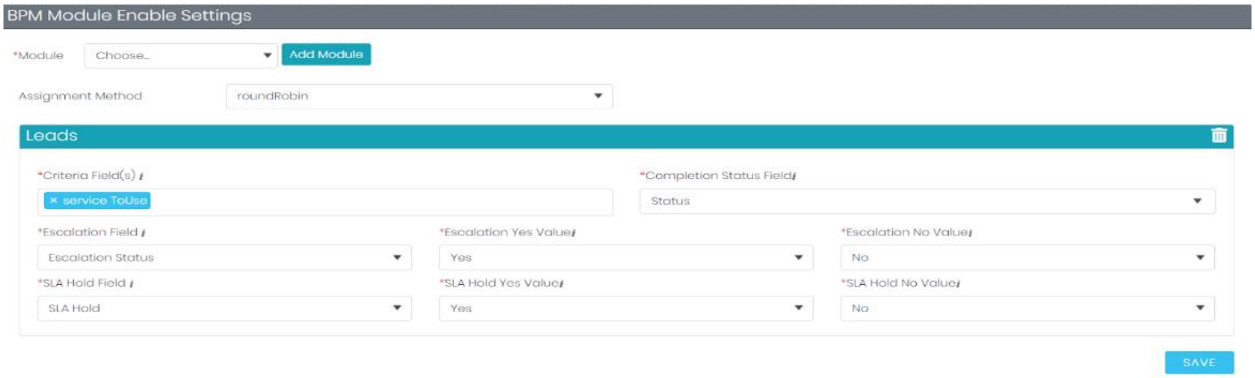
2. Addition of Required Fields in Modules: Identify the fields that should trigger the BPM and add them to the edit and detail views of the respective modules.



5.5.2. Configuration Steps from Back-End

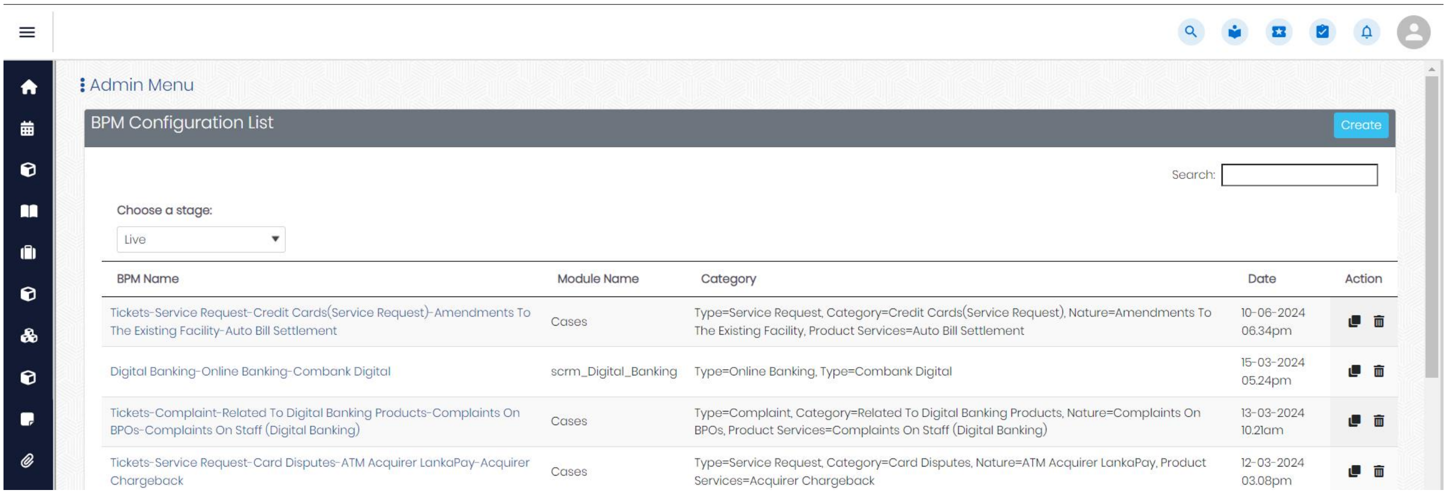
Step 1 - BPM Module Enable Settings

1. Access the CRM system as an admin and go to BPM Module Enable Settings in BPM Modules and Workflow Matrix.

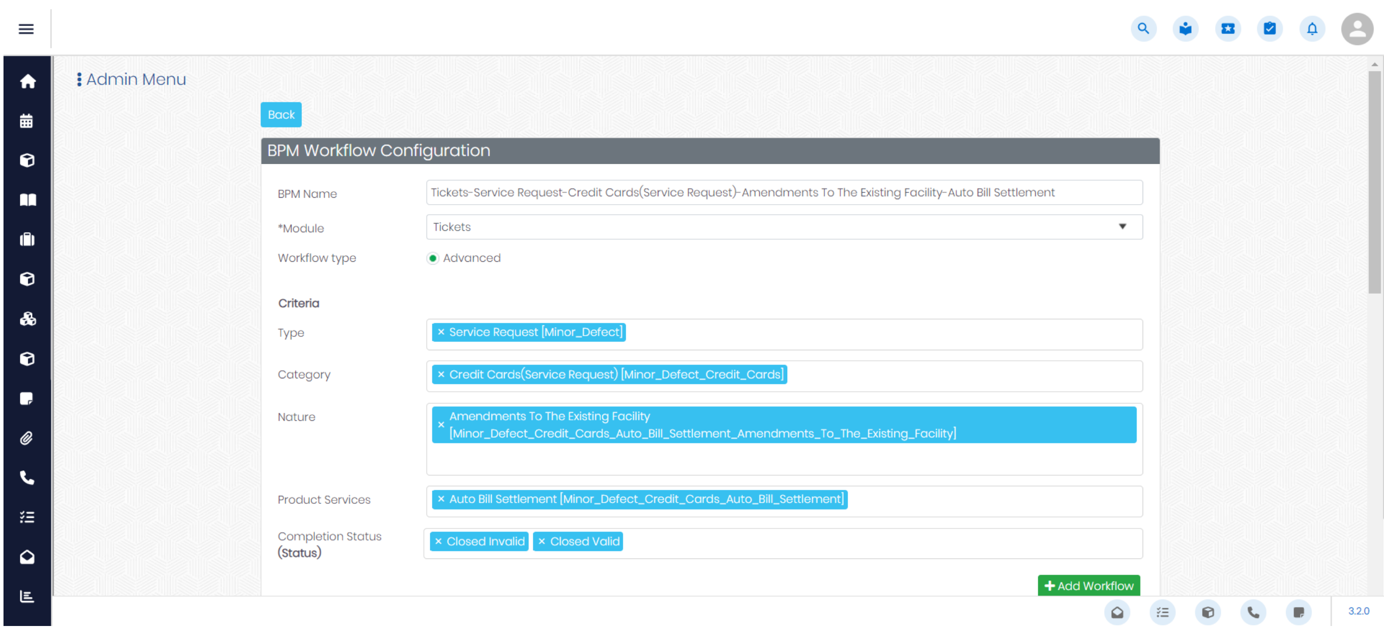


2. Choose the module for which you are designing the BPM and click on "**Add Module**."
3. Configure the following settings:
    a. Assignment Method: Select how tasks should be assigned to employees (Round Robin, Least Busy, or Random)
    b. Criteria Fields: Choose the fields that should trigger the BPM from the selected module.
    c. Completion Status Field: Create a field in the module to represent the completion status and select it from the dropdown.
    d. Escalation Status: Create a dropdown field named "Escalation Status" and define escalation values (Yes/No) based on deadline breaches.
    e. SLA Hold: Create a dropdown field for SLA Hold and define values accordingly to exclude non-working hours from calculations.
4. Click "**Save**."

Step 2 - BPM and Workflow Matrix



1. Click on "**Create**" in the top right corner.



2. Name the BPM for reference and select the module for which the BPM is designed.

3. Set up the workflow steps:

    a. Process/Description: Provide a clear description of the tasks to be performed by employees in this workflow step.

    b. Expected Time: Choose the deadline for tasks in this workflow step (in Minutes, Hours, or Days).

    c. Responsibility: Assign tasks to employees using options like Creator, Role, User, Security Groups, Assigned to, or Reporting Manager.

    d. Next Step: Select the next workflow step after tasks in the current step are completed.

e. Task Enable: Choose whether tasks are automatic or manual.

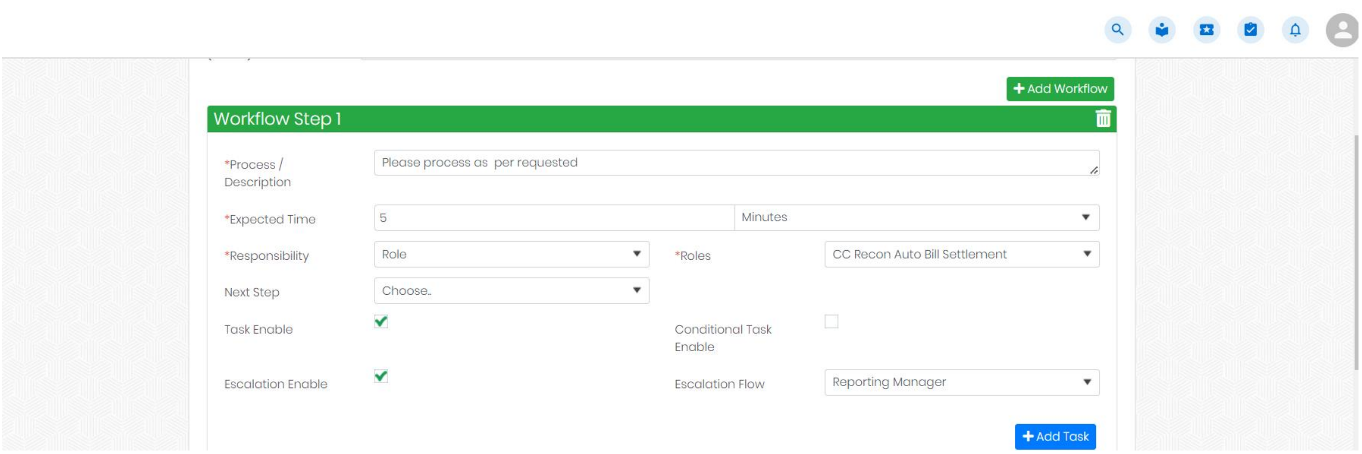
f. Conditional Task: Add decision-making tasks where employees can choose preset scenarios that lead to different workflow steps.

g. Escalation Status: Enable escalation and define escalation triggers, mode (e.g., email), and email templates.

4. Click "**Save**" to save the BPM workflow as a draft.
5. To make the BPM live, click the arrow circle icon and confirm the action.
6. To edit the workflow steps, duplicate the BPM, make necessary changes, and delete the existing live BPM.
7. After deleting the previous BPM, make the modified BPM live.

5.5.3. Sample BPM Configuration

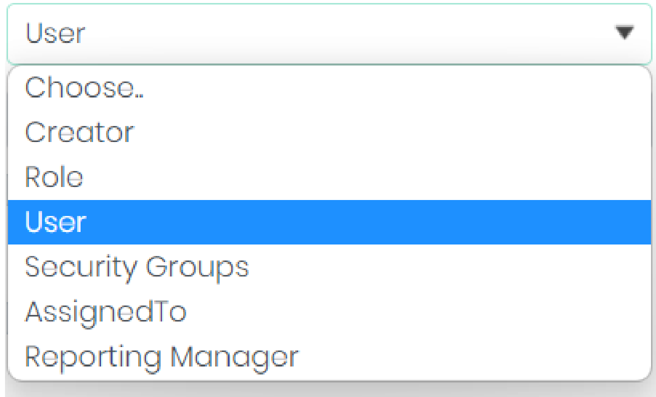
To illustrate the configuration process, we will use an example of a financial company offering various services such as insurances, loans, and mutual fund investments. We will trigger the BPM whenever a lead is created for Life Insurance



5.5.4. Configuration Steps

1. **Process/Description -** the tasks employees are expected to perform when the BPM is triggered. It should provide a clear idea of the tasks involved.
2. **Expected Time -** Choose the deadline within which the tasks in this workflow step should be completed. You can set it in minutes, hours, or days, depending on your requirement.

3. Responsibility



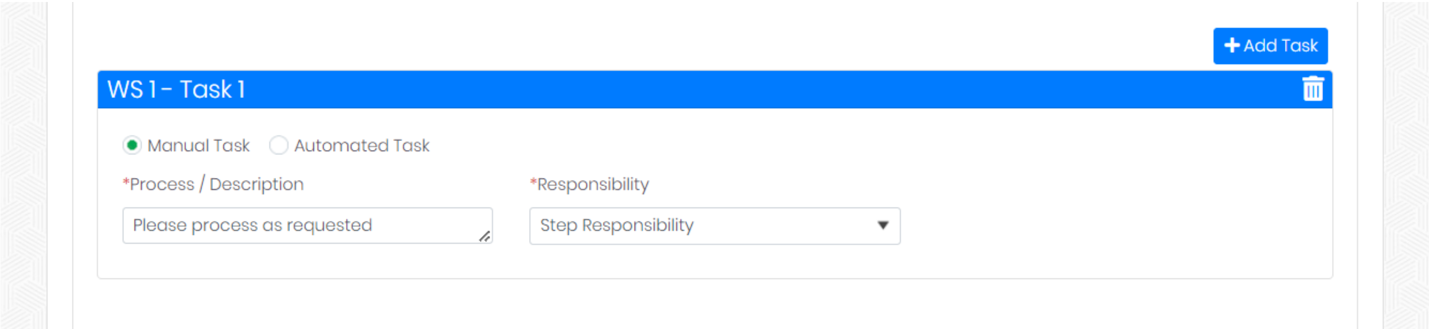
- Determine who should be assigned to complete this workflow step. Choose from the following options:
    - **Creator:** Assign the task to the employee who created the lead or entry.
    - **Role**: Assign the task to a specific role, such as sales executive, based on the chosen assignment method in the BPM enabler (e.g., Round Robin, Least Busy).
    - **User**: Directly assign the task to a specific user in the system.
    - Security Groups: Create security groups and assign tasks to group members, following the chosen assignment method in the BPM enabler.
    - **Assigned to**: Manually assign the task to any user by selecting the user in the "Assigned to" field during lead or entry creation.
    - **Reporting Manager**: Assign the task to the reporting manager of the user.

4. **Next Step**

- After completing the tasks in this workflow step, choose the next workflow step to be executed. This allows the process to move to the tasks in the selected workflow step once all tasks in the current step are closed.
- Note: The "Next Step" option is unavailable when adding a conditional task, as the next steps are defined within the conditional tasks.

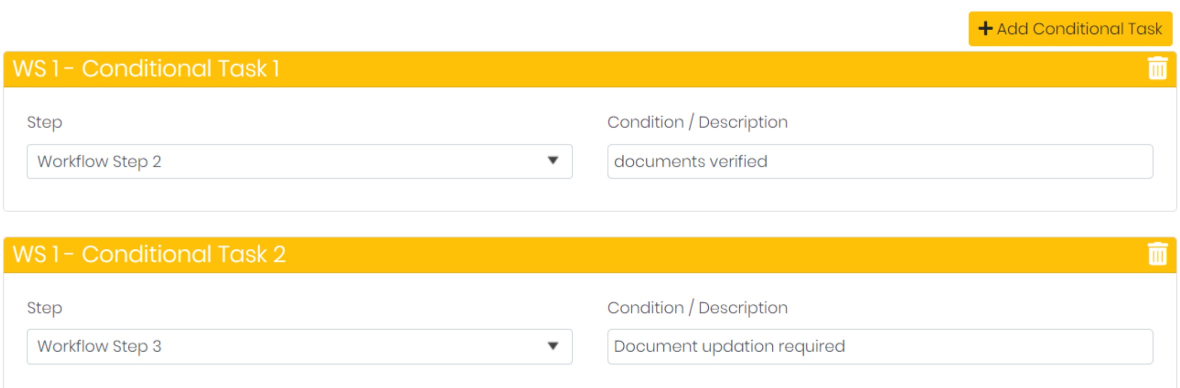
5. **Task Enable**

- Enable the task by selecting the checkbox. This reveals an "Add Tasks" button at the bottom right, which allows you to add as many tasks as needed.
- You can choose between automatic tasks, which can be integrated with other platforms for automated execution, or manual tasks that require manual completion by employees. Assign responsibility using the options discussed above.



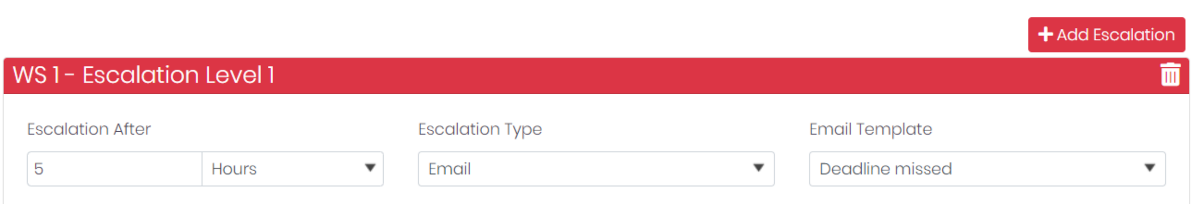
5.5.5. Conditional Task

- The conditional task enables you to add decision-making tasks. Employees assigned to this task can choose from preset scenarios, which will trigger different workflow steps.
- For example, let's say Neha has a task to collect required documents from customers. However, she may encounter situations where the documents are unclear or invalid. In such cases, a conditional task can be added, allowing Neha to choose if the documents are valid. Depending on her selection, the workflow will move to different steps, such as proceeding with the valid documents or sending an email for resubmission of invalid documents.



5.5.6. Escalation Status

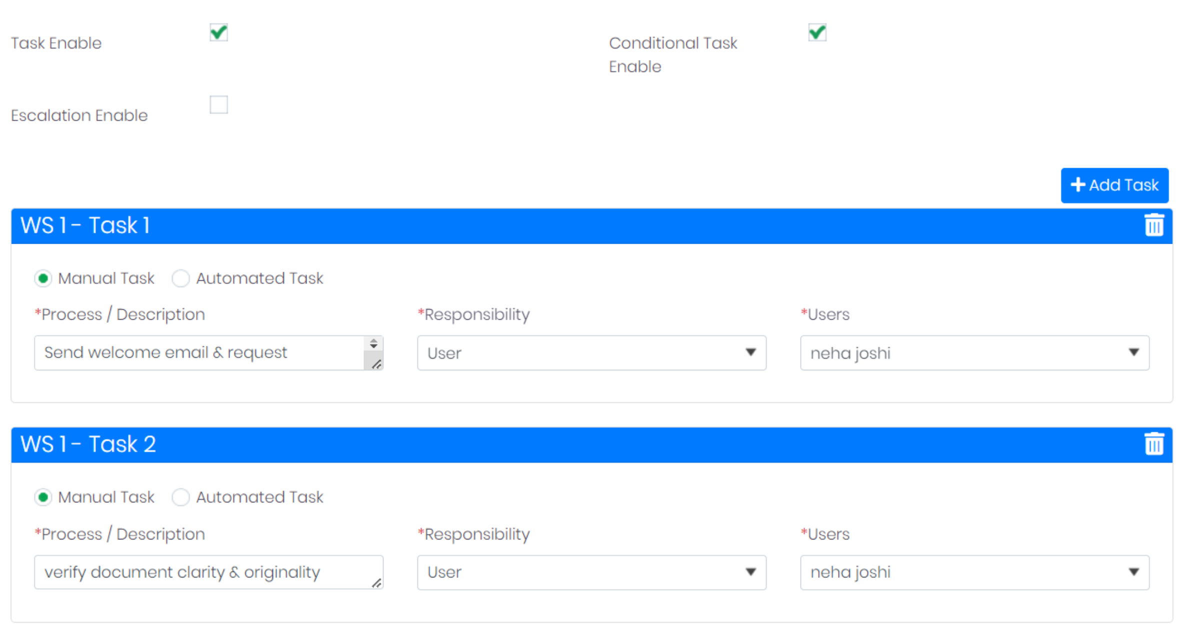
- If you have enabled escalation status for this BPM, select the checkbox and click on the "Add Escalation" button. Define the time after which an escalation to the superior should occur if the deadline is missed. Choose the escalation mode, such as email, and set a pre-designed email template to be sent to the superior once the deadline is missed and escalation is triggered.



5.5.7. Saving and Editing BPM Workflow

1. After completing the BPM workflow, click on the "Save" button at the bottom right. This saves the BPM workflow as a draft in the system.
2. To make the BPM workflow live, click on the arrow circle icon and confirm the action. Your BPM will then be complete and running.
3. To edit the workflow steps, first click on "Duplicate." This will redirect you to the draft view of the duplicated BPM workflow.
4. Make the necessary changes and save. Keep in mind that two BPMs with the same conditions cannot be live simultaneously, so you must delete the existing live BPM before making the modified BPM live.
5. After deleting the BPM from the live section, go to the draft view and make the modified BPM live. This will successfully edit the BPM workflow.

5.5.8. Back-end BPM User Interface



+ Add Conditional Task

WS 1 - Conditional Task 1

Step: Workflow Step 2
Condition / Description: documents verified

WS 1 - Conditional Task 2

Step: Workflow Step 3
Condition / Description: Document updation required

+ Add Task

WS 2 - Task 1

Manual Task | Automated Task
*Process / Description: Based on age & health factors
*Responsibility: User
*Users: neha joshi

WS 2 - Task 2

Manual Task | Automated Task
*Process / Description: create health card
*Responsibility: User
*Users: neha joshi

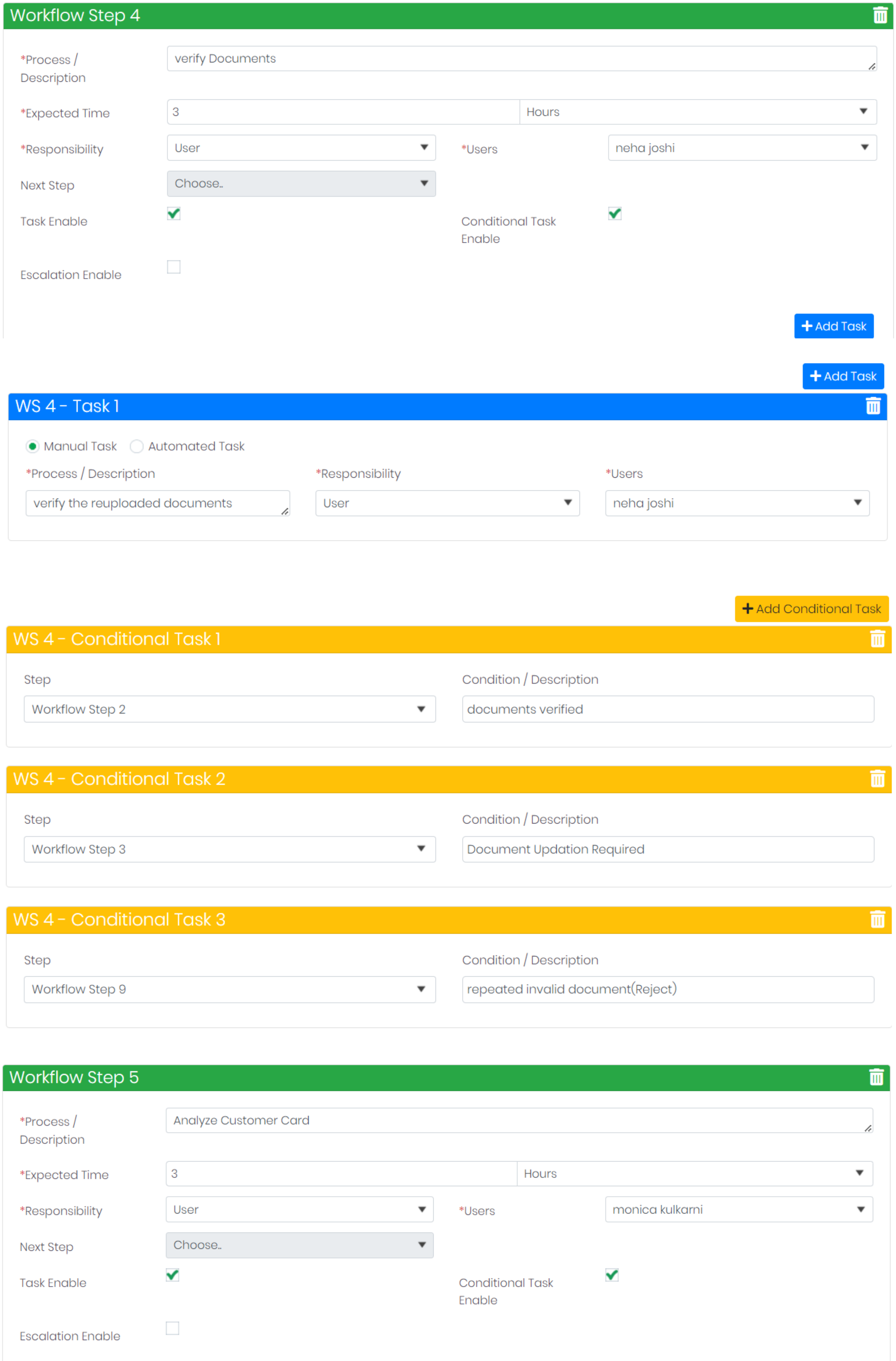
Workflow Step 3

*Process / Description: Request Prospect To Re Upload Documents
*Expected Time: 3 Hours
*Responsibility: User
*Users: neha joshi
Next Step: Workflow Step 4
Task Enable
Conditional Task Enable
Escalation Enable

+ Add Task

WS 3 - Task 1

Manual Task | Automated Task
*Process / Description: Send email requesting documents
*Responsibility: User
*Users: neha joshi


Workflow Step 4
*Process / Description
verify Documents
*Expected Time
3
Hours
*Responsibility
User
*Users
neha joshi
Next Step
Choose..
Task Enable
Conditional Task Enable
Escalation Enable
Add Task
Add Task
WS 4 - Task 1
Manual Task
Automated Task
*Process / Description
*Responsibility
*Users
verify the reuploaded documents
User
neha joshi
Add Conditional Task
WS 4 - Conditional Task 1
Step
Condition / Description
Workflow Step 2
documents verified
WS 4 - Conditional Task 2
Step
Condition / Description
Workflow Step 3
Document Updation Required
WS 4 - Conditional Task 3
Step
Condition / Description
Workflow Step 9
repeated invalid document(Reject)
Workflow Step 5
*Process / Description
Analyze Customer Card
*Expected Time
3
Hours
*Responsibility
User
*Users
monica kulkarni
Next Step
Choose..
Task Enable
Conditional Task Enable
Escalation Enable

+ Add Task

WS 5 - Task 1

Manual Task (selected) | Automated Task

*Process / Description	*Responsibility	*Users
check eligibility of prospect	User	monica kulkarni

+ Add Conditional Task

WS 5 - Conditional Task 1

Step	Condition / Description
Workflow Step 6	eligible

WS 5 - Conditional Task 2

Step	Condition / Description
Workflow Step 8	not eligible

Workflow Step 6

*Process / Description: Calculate sum Insured & premium

*Expected Time: 3 Hours

*Responsibility: User

*Users: monica kulkarni

Next Step: Workflow Step 7

Task Enable: ☑

Conditional Task Enable: ☐

Escalation Enable: ☐

WS 6 - Task 1

Manual Task (selected) | Automated Task

*Process / Description	*Responsibility	*Users
decide max life cover for customer	User	monica kulkarni

WS 6 - Task 2

Manual Task (selected) | Automated Task

*Process / Description	*Responsibility	*Users
decide monthly premium	User	monica kulkarni

Workflow Step 7

*Process / Description	Send Commercial & payment link		
*Expected Time	4	Hours	
*Responsibility	User	*Users	monica kulkarni
Next Step	Choose..		
Task Enable	☑	Conditional Task Enable	☐

WS 7 - Task 1

(•) Manual Task ( ) Automated Task

*Process / Description	*Responsibility	*Users
send email for commercial with	User	monica kulkarni

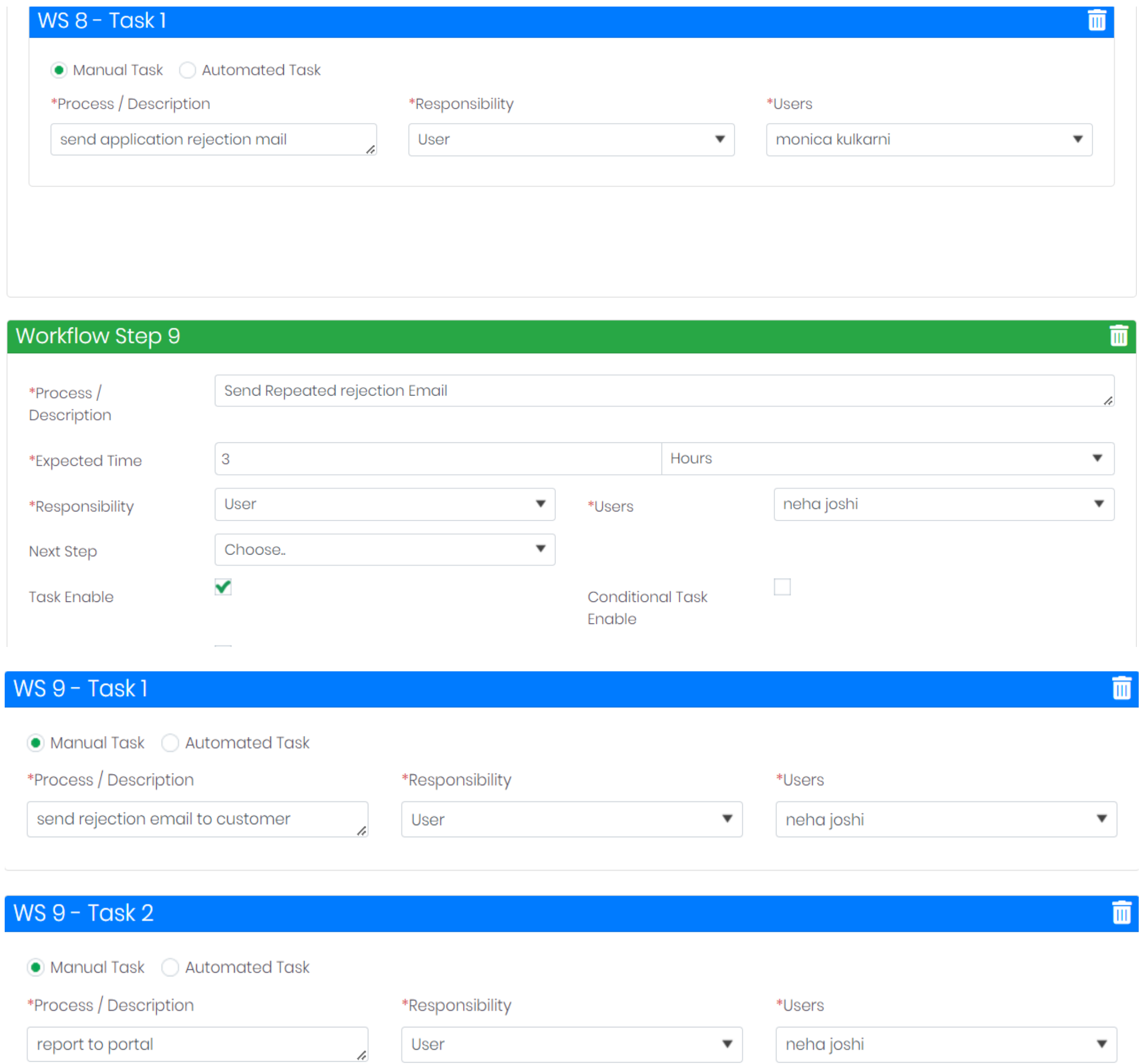
WS 7 - Task 2

(•) Manual Task ( ) Automated Task

*Process / Description	*Responsibility	*Users
inform Accounts dept about commercial	User	monica kulkarni

Workflow Step 8

*Process / Description	Send Rejection mail		
*Expected Time	3	Hours	
*Responsibility	User	*Users	monica kulkarni
Next Step	Choose..		
Task Enable	☑	Conditional Task Enable	☐
Escalation Enable	☐		



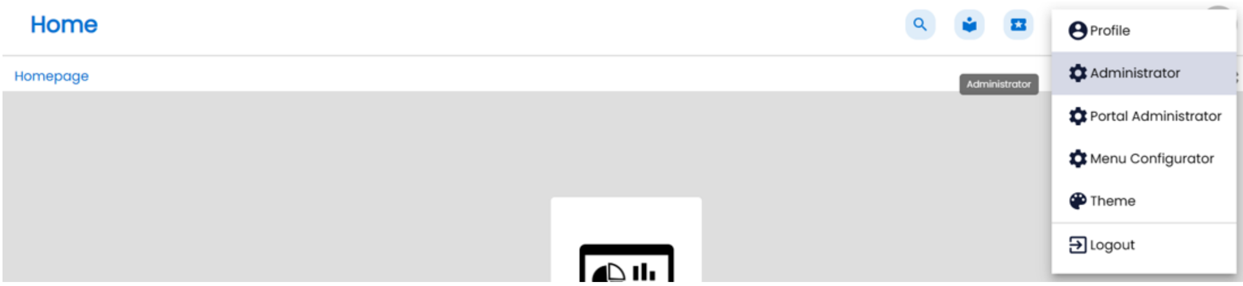
5.6. User Configuration

A user represents someone who can log in to your SimpleCRM system. In addition to the basic information (name, title, address, phone number etc) contained in the Employees module, a user has a username and password to enable them to log in to the system, and an email address. When a new User is created in SimpleCRM, a matching Employee record is created. Similarly, when a new Employee record is created, a new User record is also created. This new user record will need to be edited (if required) to add a username/password and email address before it can be used to log in to SimpleCRM.

The Users section of the Administration Panel holds settings for SimpleCRM user accounts and security access settings.

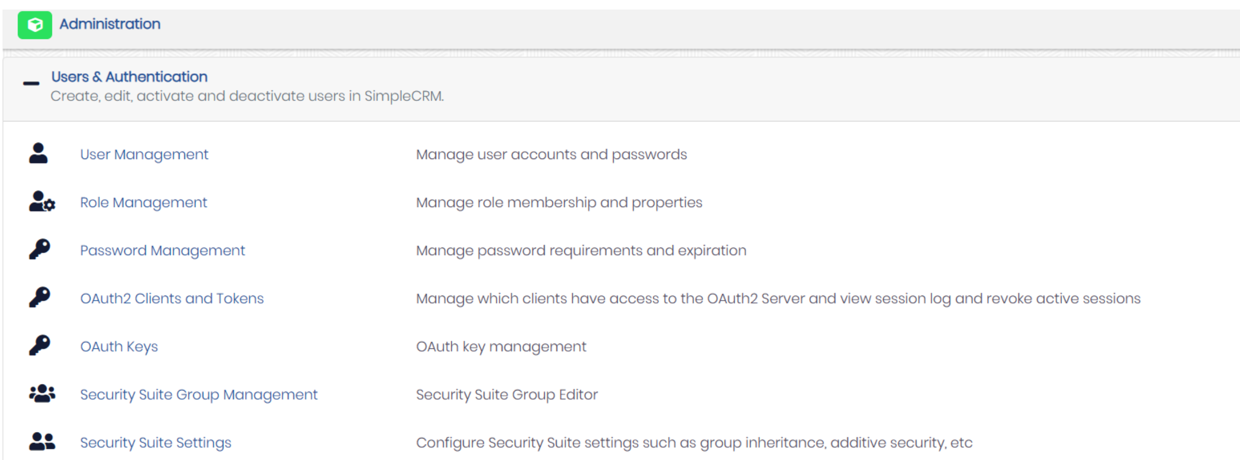
Note - You must have Administrator access to add new user accounts and edit access settings. Regular users have access to their own user account details and can edit address details, set preferences, set up personal email and change their password.

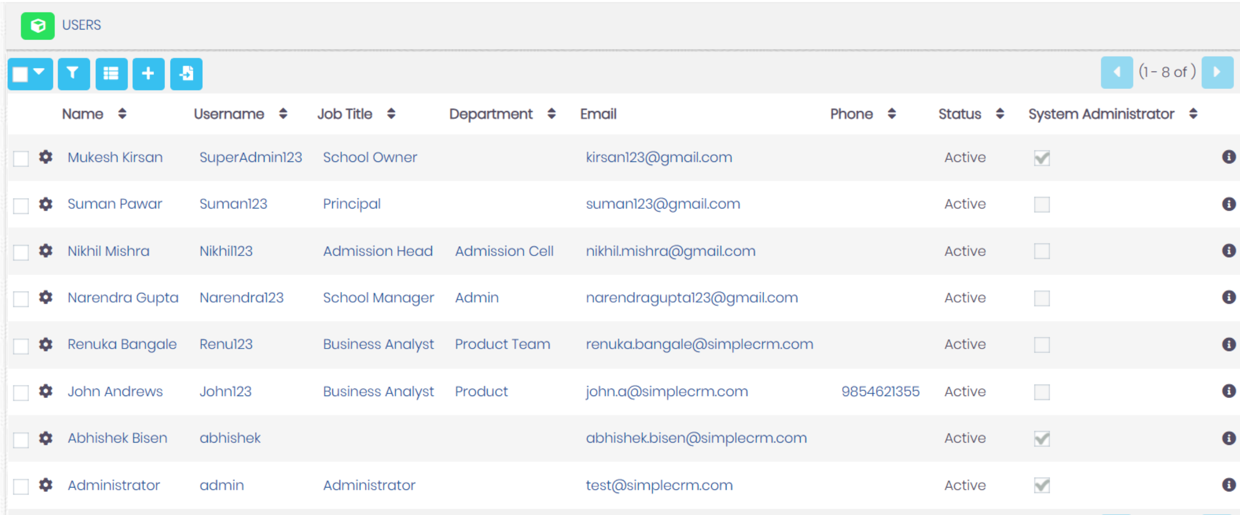
Open the Administration panel by selecting Admin from the dropdown at the top right-hand of the SimpleCRM screen.



5.6.1. User Management

Select User Management to view, edit and add new user accounts.





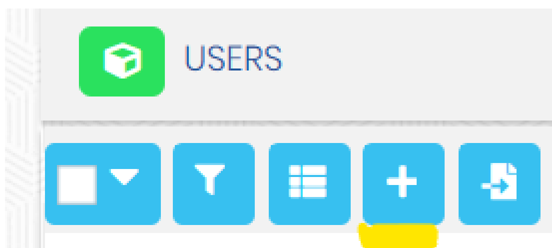
USERS

(1 - 8 of)

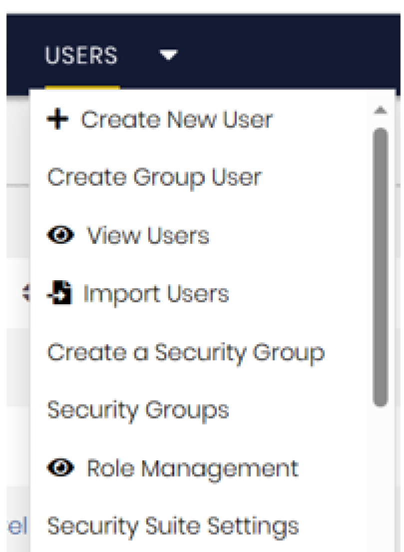
Name	Username	Job Title	Department	Email	Phone	Status	System Administrator
Mukesh Kirsan	SuperAdmin123	School Owner		kirsan123@gmail.com		Active	✓
Suman Pawar	Suman123	Principal		suman123@gmail.com		Active	
Nikhil Mishra	Nikhil123	Admission Head	Admission Cell	nikhil.mishra@gmail.com		Active	
Narendra Gupta	Narendra123	School Manager	Admin	narendragupta123@gmail.com		Active	
Renuka Bangale	Renu123	Business Analyst	Product Team	renuka.bangale@simplecrm.com		Active	
John Andrews	John123	Business Analyst	Product	john.a@simplecrm.com	9854621355	Active	
Abhishek Bisen	abhishek			abhishek.bisen@simplecrm.com		Active	✓
Administrator	admin	Administrator		test@simplecrm.com		Active	✓

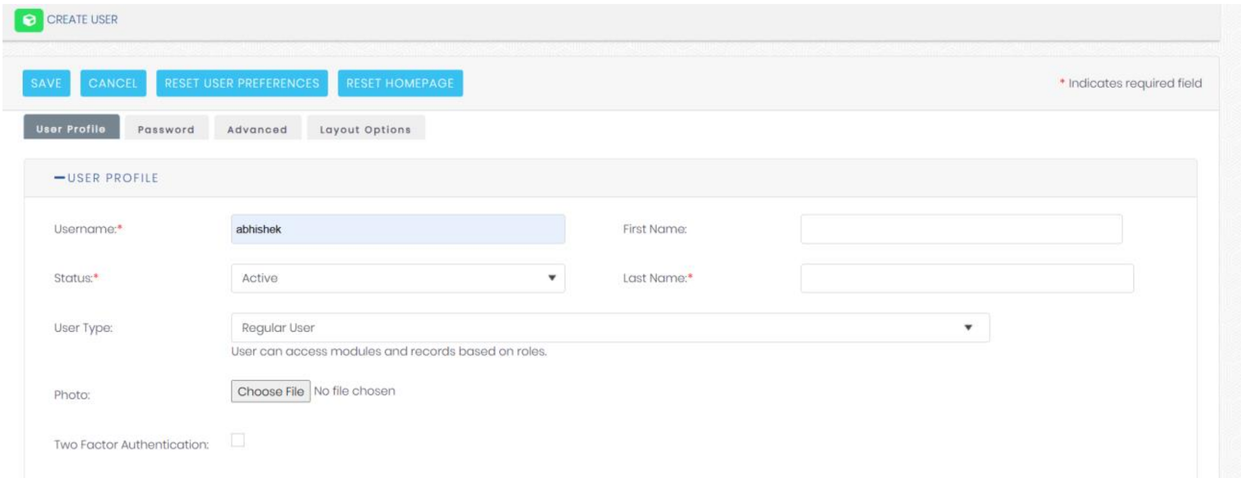
5.6.2. Add New User

Select **"+"** icon from this bar to add a new user account.



The user can also create the user by clicking on Create User option from sie bar -





On the default User Profile tab, enter the new username, user's first and last names and the account status (Active or Inactive).

Note - Only Active accounts can be used to log in to SimpleCRM. In addition, Inactive account usernames are not included in dropdown username lists (e.g. assigned to or modified by lists) used for record searching.

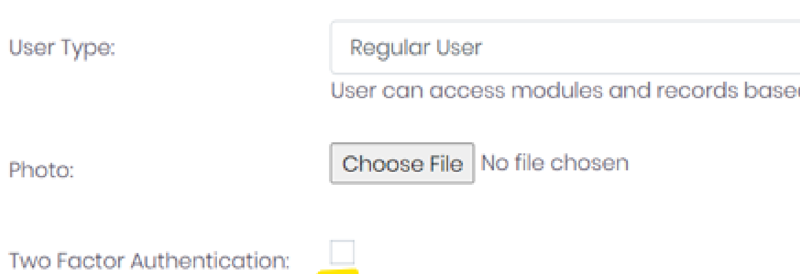
Select the User Type from the drop down. A System Administrator User can access the Administration panel and all records in SimpleCRM. A regular user has access to modules and records based on the role(s) assigned to them. See Roles and Security Groups for further information.

An optional photograph can be attached to the user record. Browse for the required file using the Choose file button. The photo will be displayed on the detail view of the user record once the record has been saved.

5.6.3. Two Step Authentication

Two Factor Authentication can be enabled on a per-user basis. Once enabled, a user will be required to enter a code received via email each time they log on to SimpleCRM.

Check the Two Factor Authentication box to enable.



Click **SAVE** to retain the settings.

5.6.4. Employee Information

Optional further information about the user can be added in the Employee Information panel. Changes made here will be reflected in the corresponding Employee record.

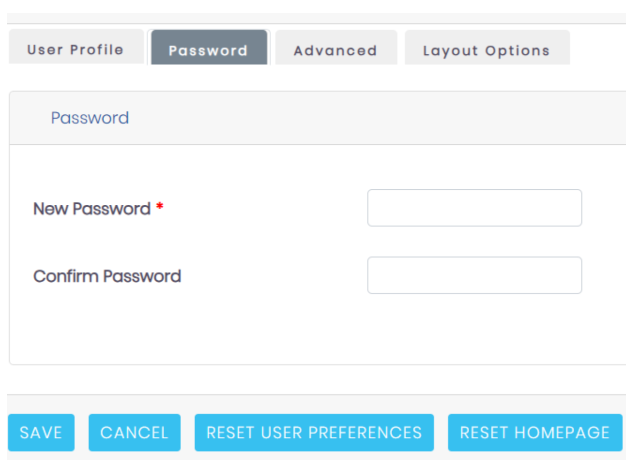
5.6.5. Email Settings

An email address is also required for a user account. This address is used to send system generated emails such as workflow notifications and record assignments. Further accounts can be added using the + button. Where there is more than one account, select the account to be used as the primary account.

For further information regarding user email settings, see user profile email settings

5.6.6. Password Tab

Set the password for a new user here, or reset the password for an existing user.
Note - The Password tab will not be visible on the user record if you have the System-Generated Passwords Feature enabled. To enable/disable system-generated passwords, please see the Password Management section of this document.



Enter the new password and click **SAVE**.

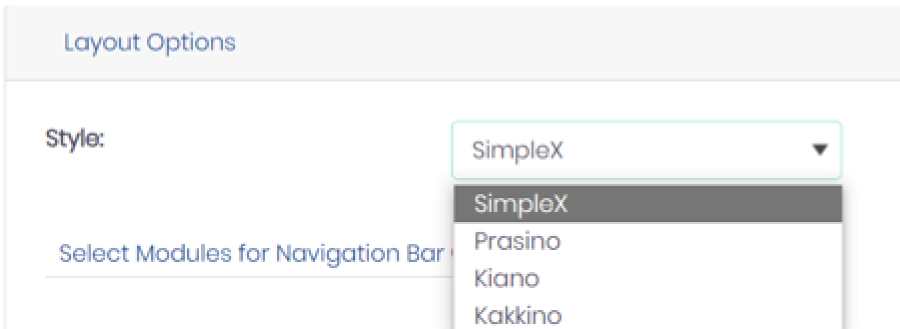
5.6.7. Advanced Tab

User settings (including notification and reminder settings and import settings), Locale settings (date/time, currency etc) and Calendar options for iCal integration can be set here. These are all user-configurable.

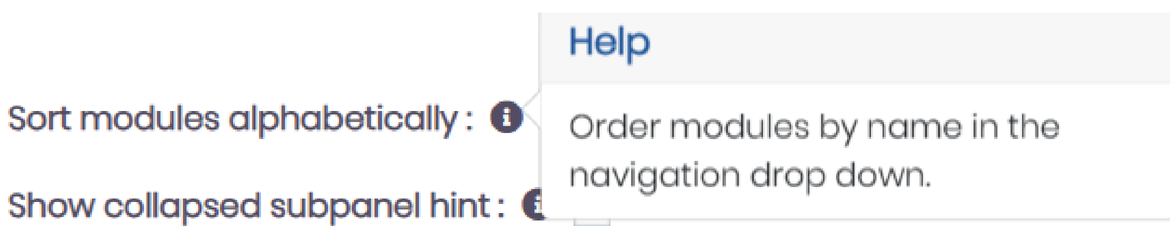
5.6.8. Layout Option

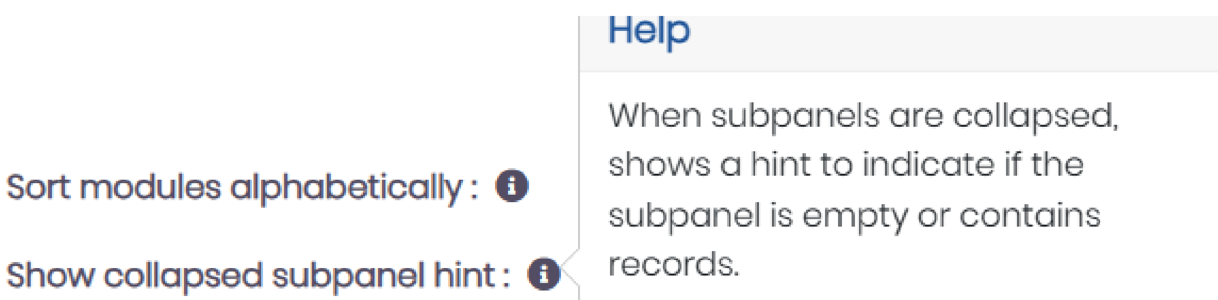
Layout option allow user to choose the style from the following dropdown option -

- SimpleX
- Prasino
- Kiano
- Kakino



Also, this option allows the user to show and hide the modules to that particular user. The user can also check the box for the following options -





5.7. Password Management

From the Admin panel, select Password Management to open the settings page.

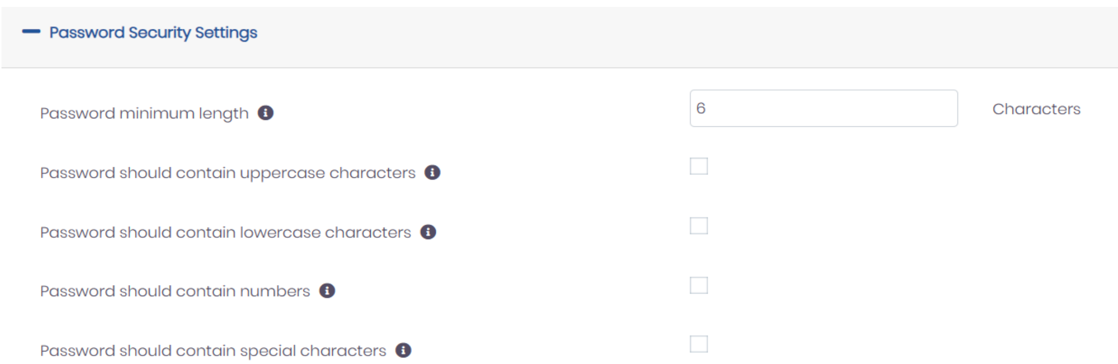
5.7.1. System-Generated Passwords

If this feature is enabled, passwords for new user accounts will be generated automatically and emailed to the address on the user's account.

This requires both an outbound email server to be configured and a valid email address on the user's record

5.7.2. Password Security Settings

These are optional password security settings for user passwords. Once set, user passwords must meet the selected criteria.



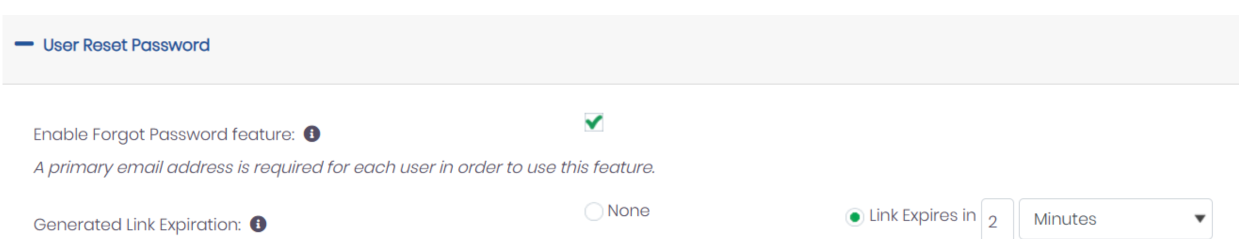
Check the boxes to select the required password features.

Note that special characters are #$%^&*()+=-[]';,./{}|:<>?~

Click **SAVE** to retain the settings.

5.7.3. User Reset Password

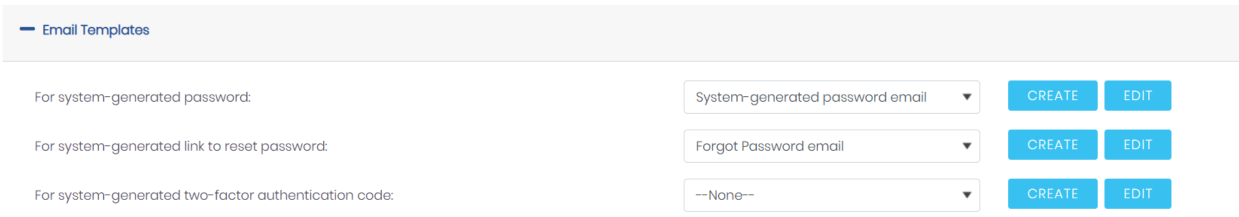
When this feature is enabled, users will be able to reset their passwords from a link on the SimpleCRM login page.



Note - This requires both an outbound email server to be configured and a valid email address on the user's record

5.7.4. Email Templates

The templates for password-related system-generated emails can be edited here. Please see the Email Templates documentation for further information regarding creating and editing email templates.



5.7.5. LDAP Support

If LDAP Authentication is enabled, none of the SimpleCRM Password Management settings will apply. Passwords will be managed by LDAP settings.

5.7.6. SAML Authentication

If SAML Authentication is enabled, none of the SimpleCRM Password Management settings will apply. Passwords will be managed by SAML settings.

5.8. Roles Management

The following information will provide a step-by-step guide to configure roles and security groups in the CRM system.

5.8.1. Prerequisites

- Ensure that you have administrative access to the CRM system.
- Familiarize yourself with the data structures and objects in the CRM system.
- Ensure that you have added users in order to assign roles and security groups.

5.8.2. About Roles

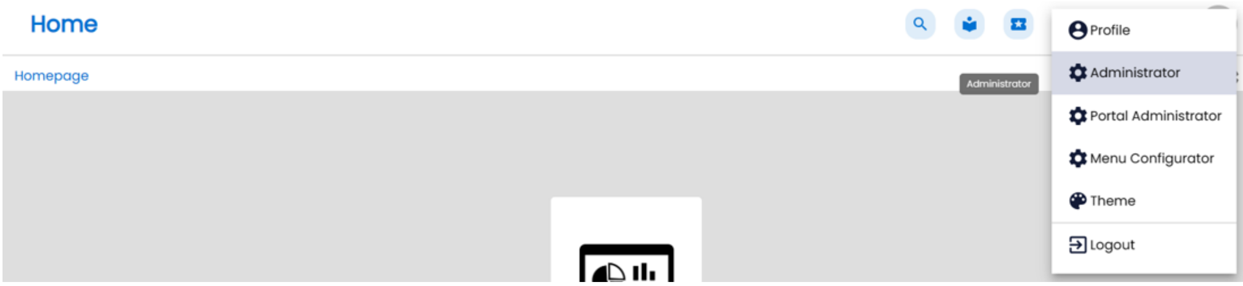
Roles define the permissions and access levels for different entities within a CRM system. They determine what actions a user or a group of users can perform. Roles are typically assigned to users based on their job responsibilities or functional requirements. To configure roles, follow these steps:

- Identify the different roles needed in your system based on the tasks and responsibilities of users.
- Define the permissions and privileges associated with each role, such as read, write, create, delete, etc.

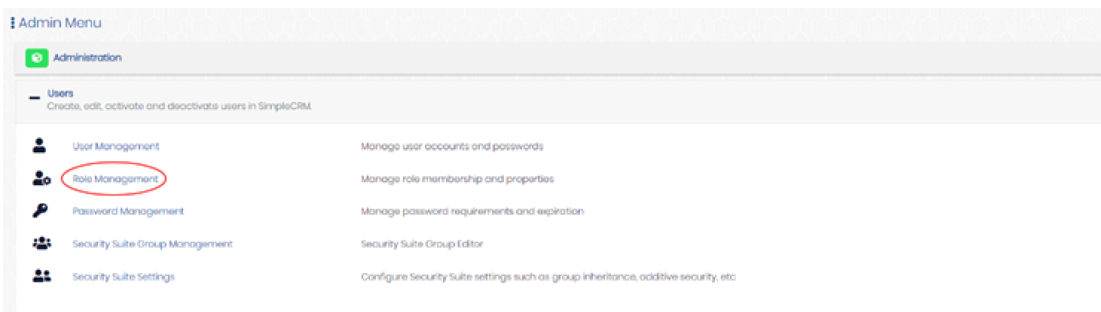
- Assign the appropriate roles to users or user groups based on their requirements.

5.8.3. Configuration Steps

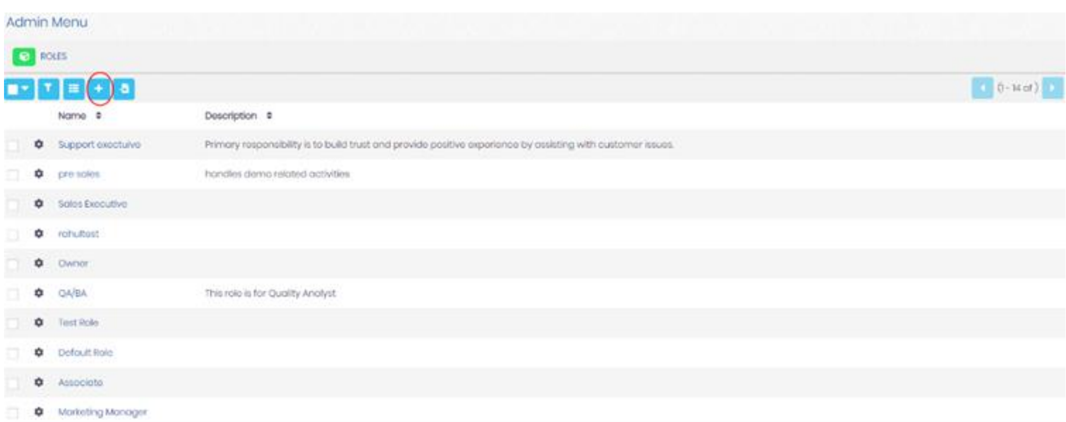
1. Access the CRM system as an admin.



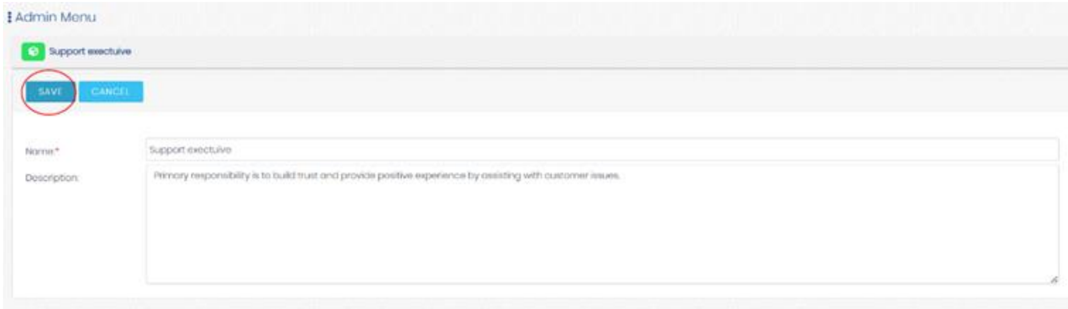
2. Navigate to the Role Management section, which allows you to manage role memberships and properties.



3. Click on the "+" sign to create a new role.



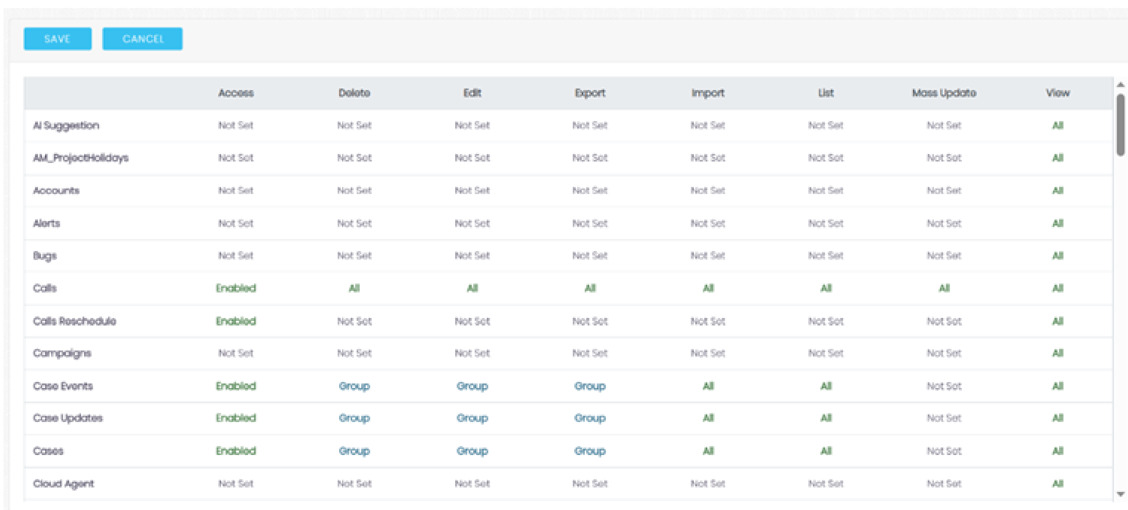
4. Provide a name and description for the role, then click "Save".



5.8.4. Role Access Control

Once a role is created, click on the role from the list view to configure it.

Inside the configuration settings, click on a cell to change the access setting. Note that you can change the setting for an entire column by clicking on the column heading.



Use the Access column to determine whether users can access each module:

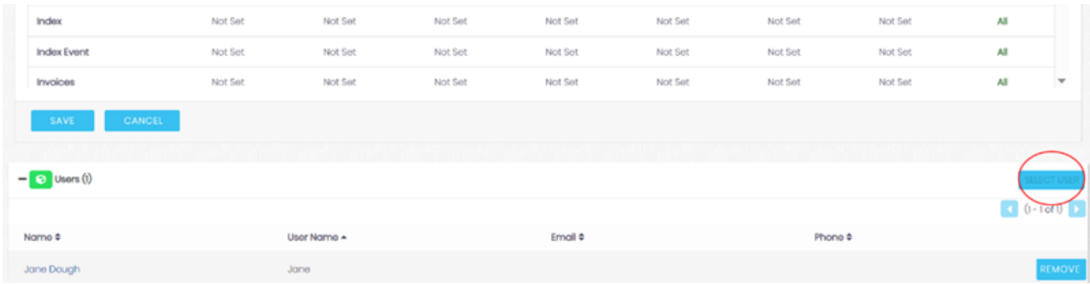
- Enabled: Users have access to this module.
- Disabled: Users will not be able to view records for this module.

Use the Delete, Edit, Export, Import, List, Mass Update, and View columns to determine available record functions for users:

- All: Gives access to all records.
- Group: Gives users access to all records assigned to members of the same group.
- Owner: Gives users access only to their own records.

- None: Users will not have access to this function for this module.

You can add users to the role by clicking on "Select User".



Search for a user using the search view or the list view.

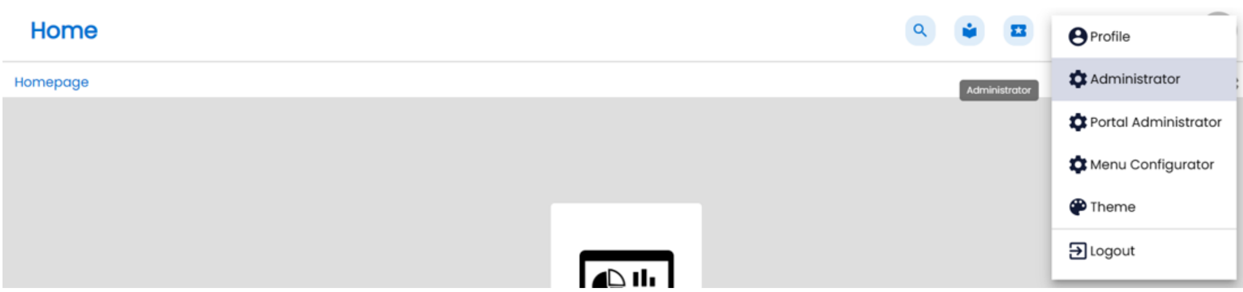
Click "Save".

By following these steps, you can create and manage user roles in SimpleCRM. Assigning appropriate roles to users ensures that they have the necessary permissions and access levels to perform their tasks effectively. For further assistance or clarification, please refer to the CRM system documentation or contact our support team.

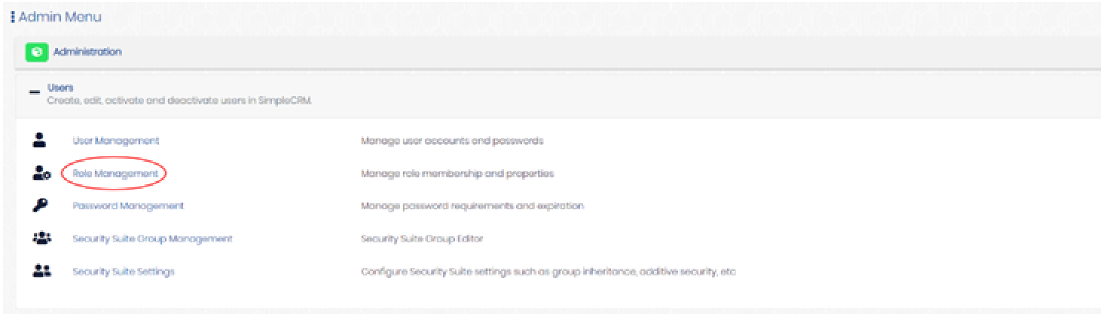
5.9. Security Group Management

5.9.1. Configuration Steps

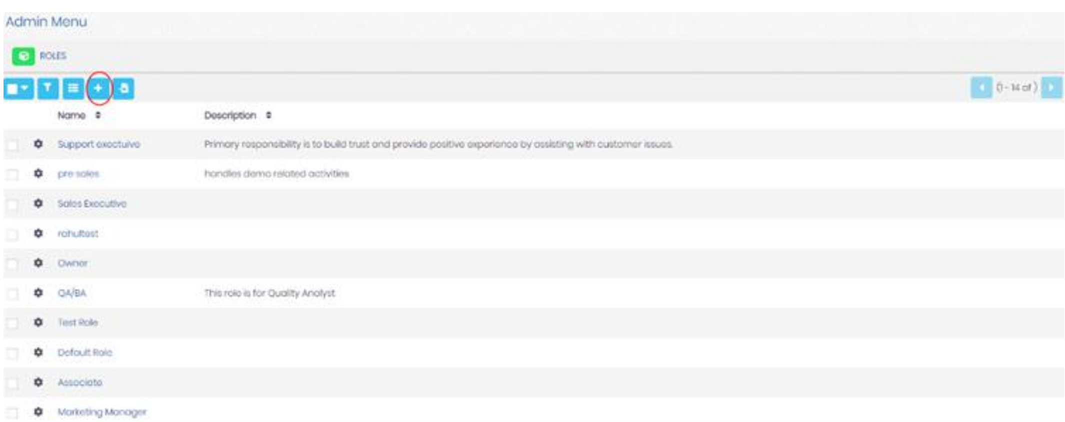
1. Access the CRM system as an admin.



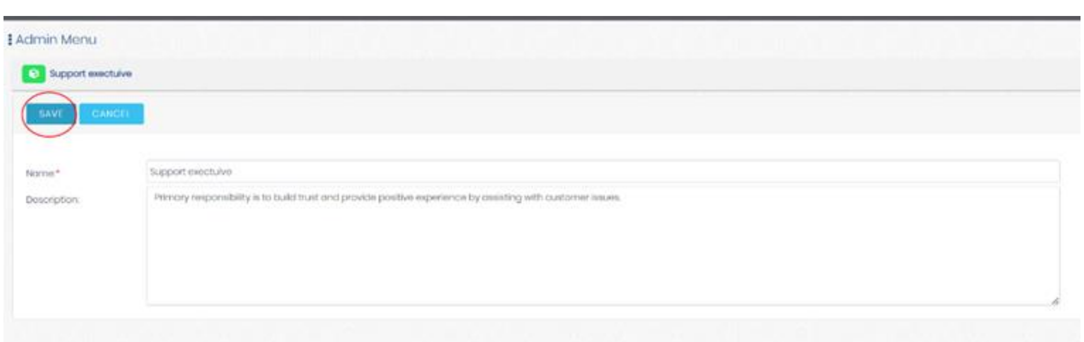
2. Navigate to the Role Management section, which allows you to manage role memberships and properties.



3. Click on the "+" sign to create a new group.



4. Provide a name and description for the group, then click "Save".



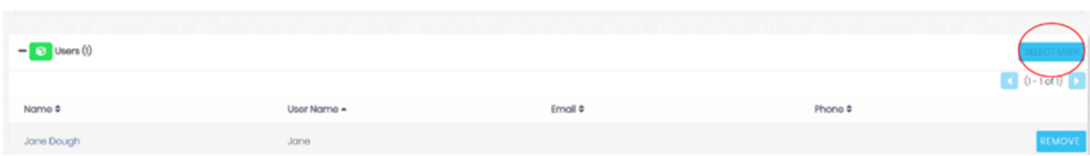
5.9.2. Adding Roles to Security Group

1. You can add Roles to the Security Group by clicking on "Select Role".
2. Search for a Role using the search view or the list view.
3. Select the required Role.
4. Click "Save".

By following these steps, you can create and manage Security Groups in SimpleCRM. Assigning appropriate groups & roles to users ensures that they have the necessary permissions and access levels to perform their tasks effectively. For further assistance or clarification, please refer to the CRM system documentation or contact our support team.

5.9.3. Adding Users to Security Group

1. You can add users to the Security Group by clicking on "Select User".
2. Search for a user using the search view or the list view.
3. Select the required User/s.
4. Click "Save".



5.10. Developers Tools

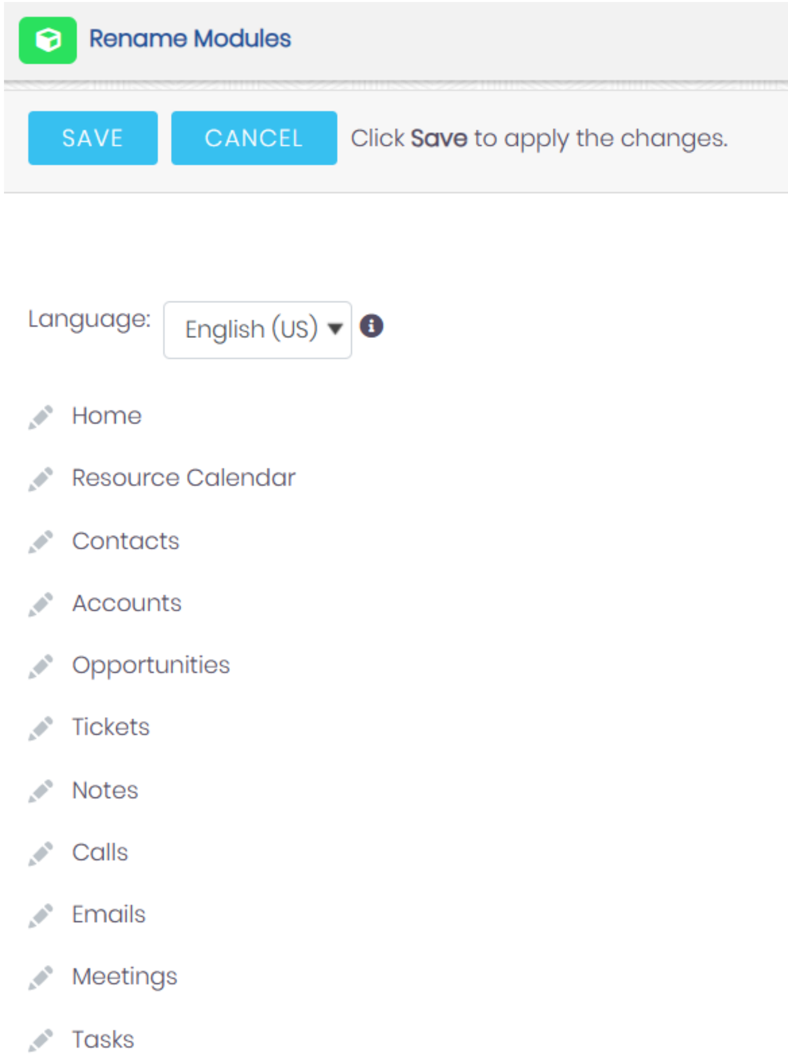
5.10.1. Studio

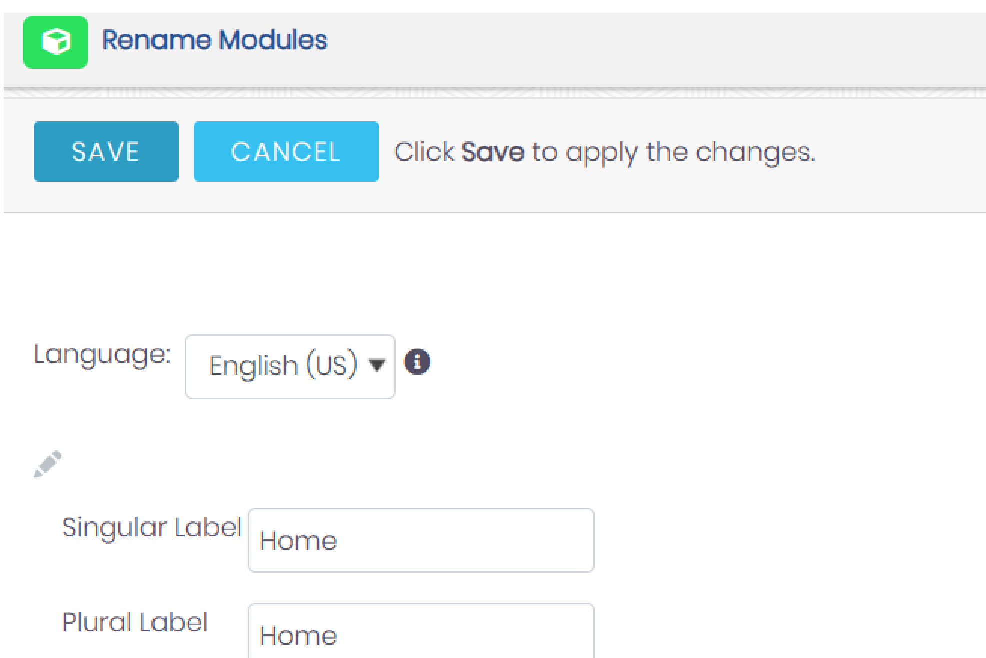
The Studio tools allow you to customize the information shown in the modules and how it is displayed.

See the dedicated Studio guide for more information on how to use the Studio tools.

5.10.2. Rename Modules

Use this panel to rename a SimpleCRM module. For example, you may wish to rename Accounts as Businesses.

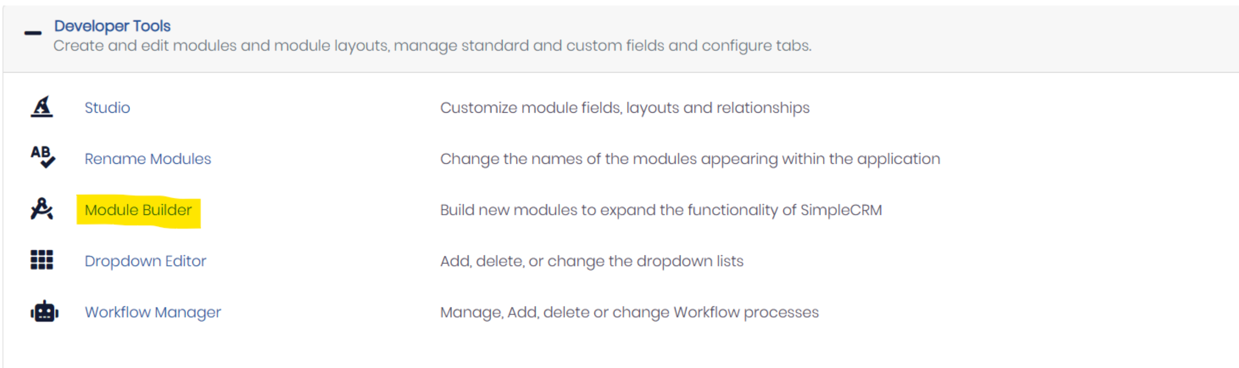

Rename Modules
SAVE
CANCEL
Click Save to apply the changes.
Language:
English (US)
Home
Resource Calendar
Contacts
Accounts
Opportunities
Tickets
Notes
Calls
Emails
Meetings
Tasks


Rename Modules
SAVE
CANCEL
Click Save to apply the changes.
Language:
English (US)
Singular Label
Home
Plural Label
Home

Click on the module you wish to rename. Enter the new singular and plural labels for the module and click **SAVE.**

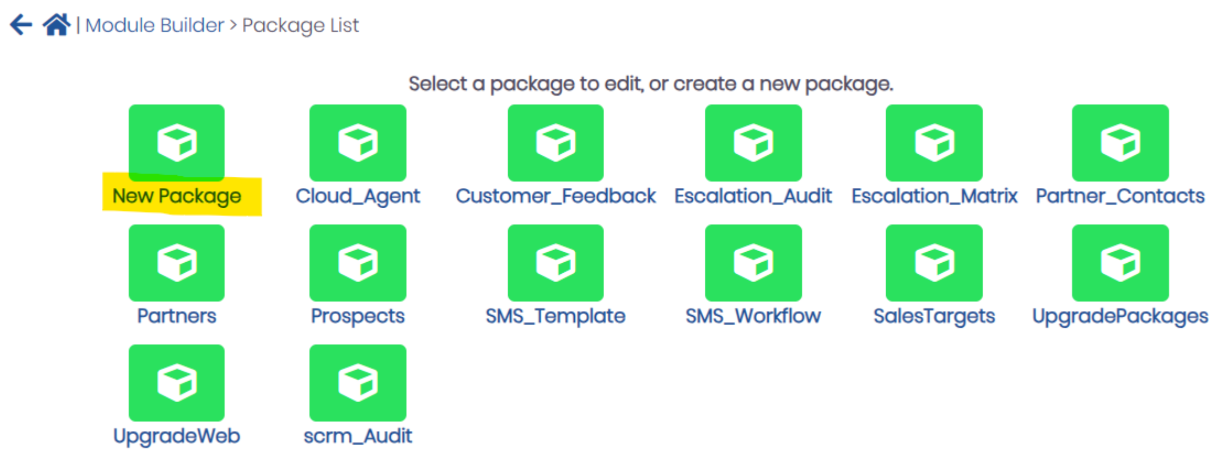
5.10.3. ModuleBuilder

Use the Module Builder to create custom modules in SimpleCRM. The process of creating a custom module is as follows:

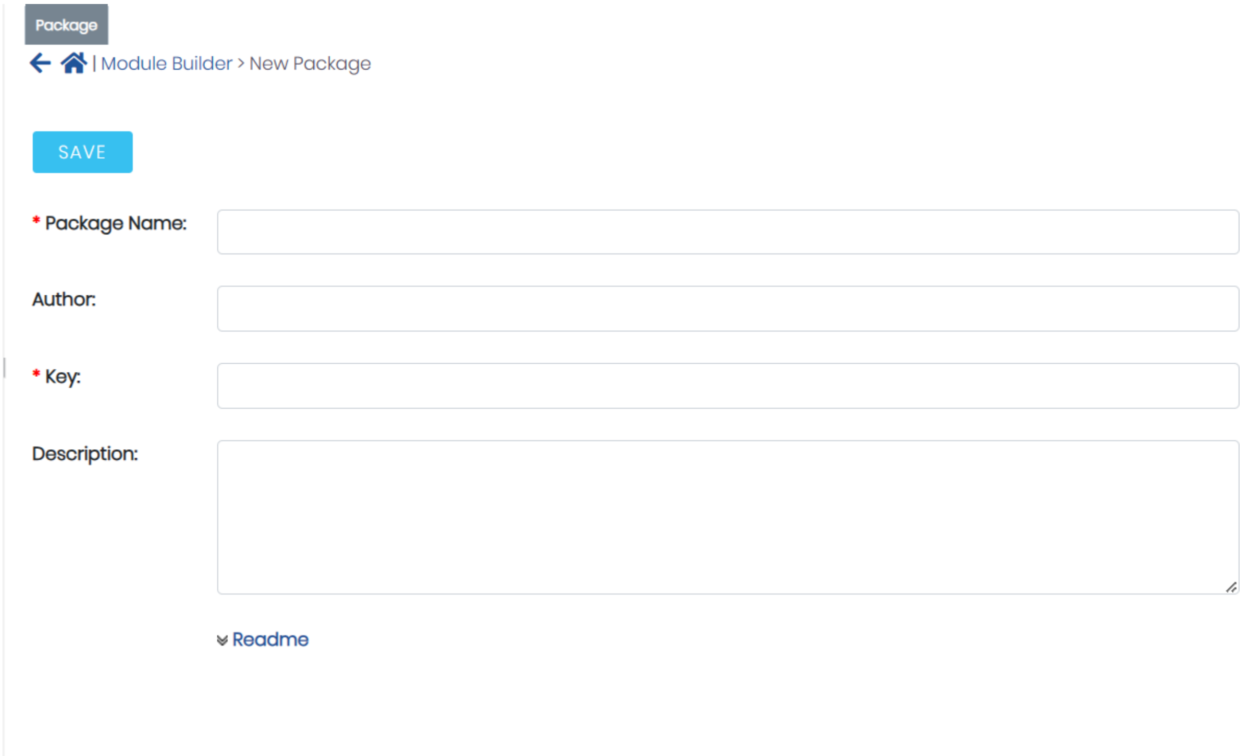


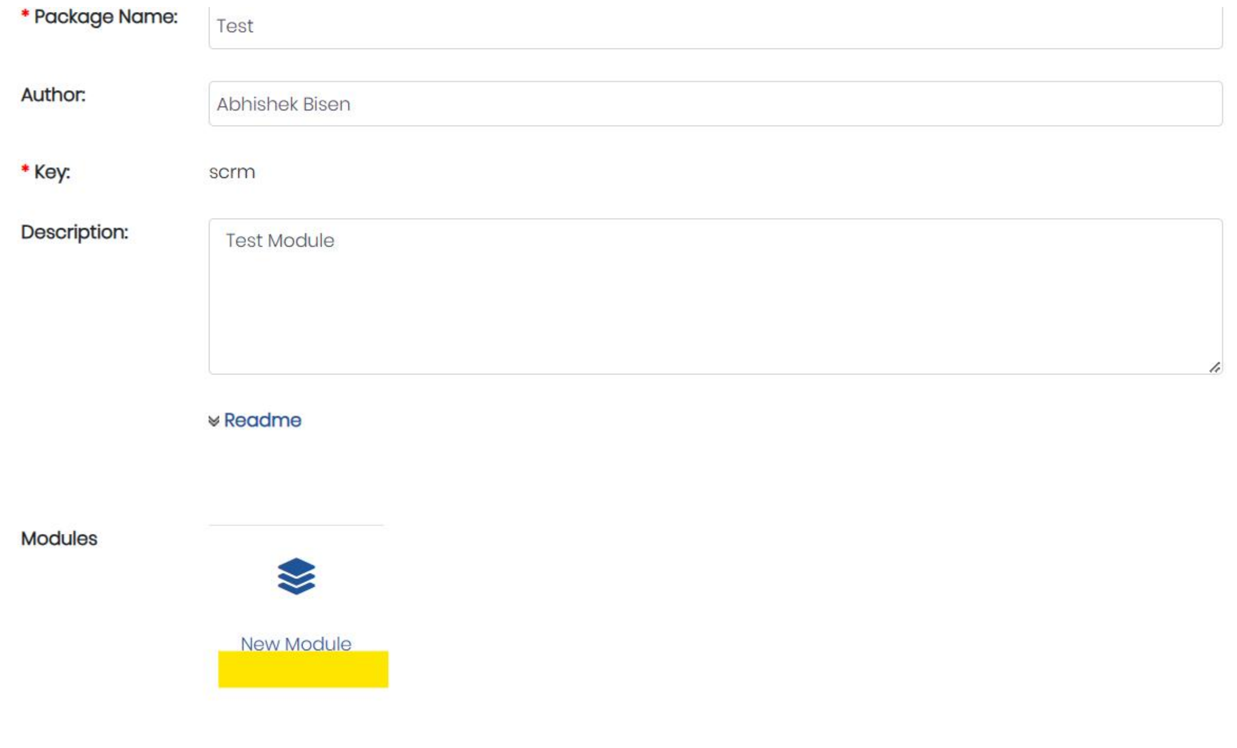
5.10.4. Module Package

Create a package to house the new module(s).

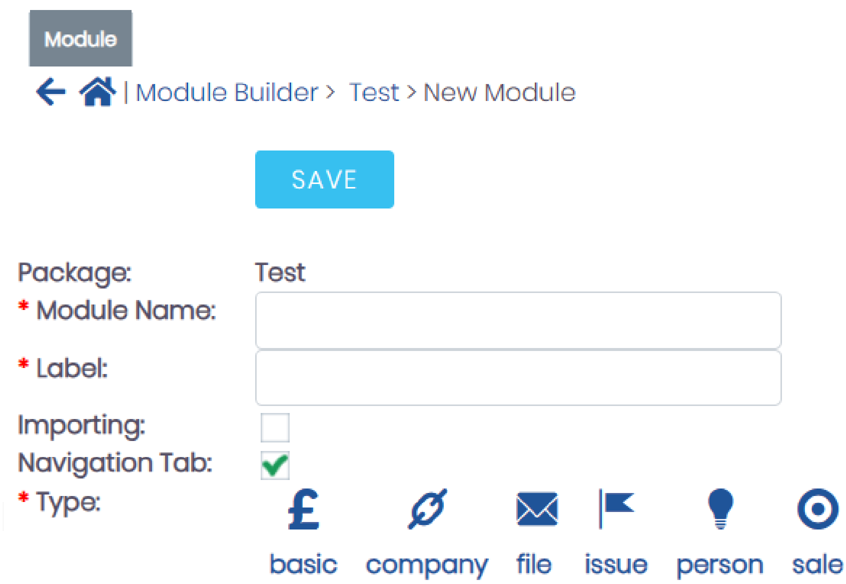


Create a module using one of the following templates that SimpleCRM provides for you:


Package
| Module Builder > New Package
SAVE
* Package Name:
Author:
* Key:
Description:
Readme



After clicking on the New Module option, the user will be able to rename and save it later.



- **Basic**

This template provides basic fields such as ID, Date Entered, and Created By. Use this template to create a module from scratch.

- **Company**

This template provides organization-specific fields such as Company Name, Industry, and Billing Address. Use this template to create a module that is similar to the Accounts module.

- **File**

This template provides document-specific fields such as File Name and Document Type. Use this template to create a module that is similar to the Documents module.

- **Issue**

This template provides case and bug-specific fields such as ID, Description, and Created By. Use this template to create a module that is similar to the Cases module or Bug Tracker module.

- **Person**

This template provides individual-specific fields such as salutation, title, name, address, and phone number. Use this template to create a module that is similar to the Contacts module or the Leads module.

- **Sale**

This template provides opportunity-specific fields such as Lead-Source and Probability. Use this template to create a module that is similar to the Opportunities module.

Furthermore, you can configure the following options:

- **Importing**: Selecting this option to allow data import into the module.
- **Navigation Tab**: By default, this option is enabled to create a tab for the module on the top navigation bar.

5.10.5. Distribute a Package

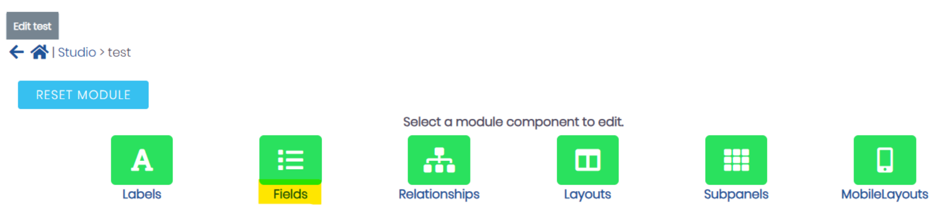
You can choose one of the following options to distribute the package:

- **Deploy** – This option is designed to install the custom module on your local SimpleCRM instance and make it available to users in your organization. After deployment, if needed, you can make further changes to the module in Module Builder and deploy it again to update the installed module. However, note that if you change a deployed custom module in Studio and then re-deploy it from Module Builder, all changes made prior in Studio will be lost.
- **Publish** - This option is designed for distribution to specific users or customers. The system creates a zip file, which you can save on your local machine. You can then email it to one or more individuals who can use the Module Loader to upload the zip file into their SimpleCRM instance. After the module is installed through Studio, you can add or remove fields and make other changes to a published module.
- **Export** - This option is designed for distribution to developers. The system creates a zip file, which you can save on your local machine and share with others. Using the Module Loader, developers can install it on their SimpleCRM instance and customize it further in Module Builder if necessary. The package is visible only in Module Builder and, hence, only administrators can access it until it has been deployed.

5.10.6. Module Options

The user will have to choose the following option -

- Go To Admin
- Go To Sudio
    - Selected recently created or any module that you want to customize



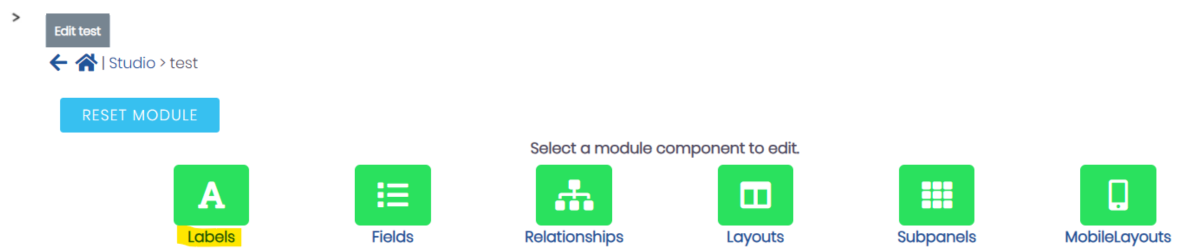
- **Labels**: View/edit field labels and the module name
- **Fields**: View/edit field properties and add new fields
- **Relationships**: View/edit/add relationships between modules
- **Layouts**: Customize the edit/detail/list and filter views
- **Subpanels**: Set which columns are displayed on module subpanels

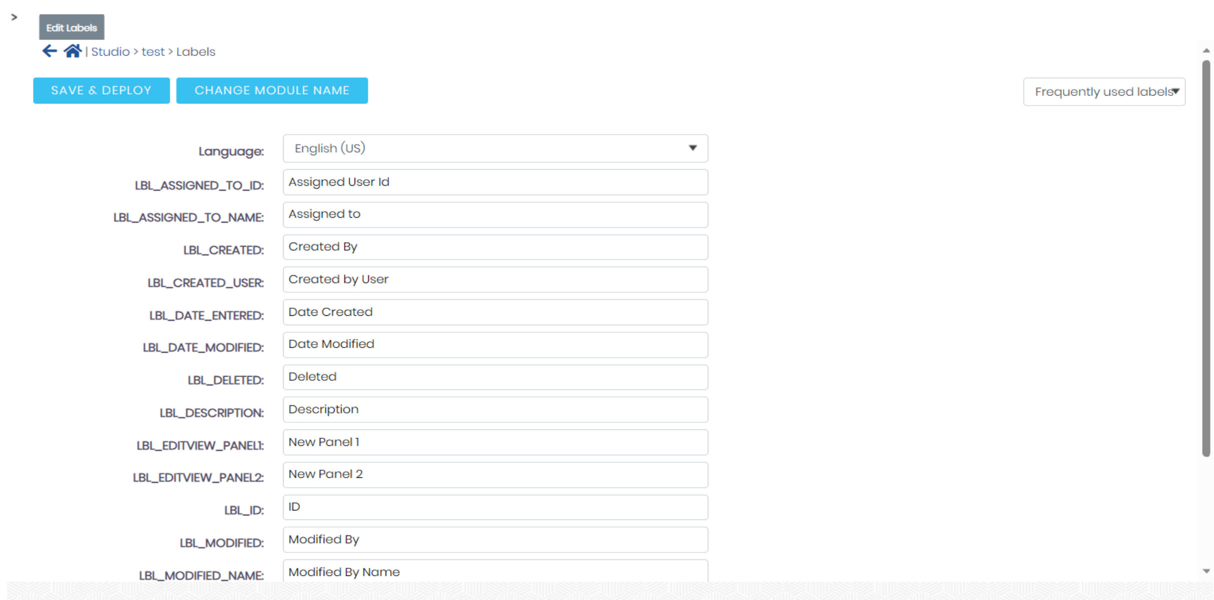
5.10.7. Labels

Selecting the Labels component lists all the field labels for the module. Edits to labels will be reflected on the module layouts.

Click and type to make the required changes to the labels and then click SAVE & DEPLOY.

A confirmation message will appear once the changes have been saved. You should now be able to see the changes to the labels when you navigate to the module.





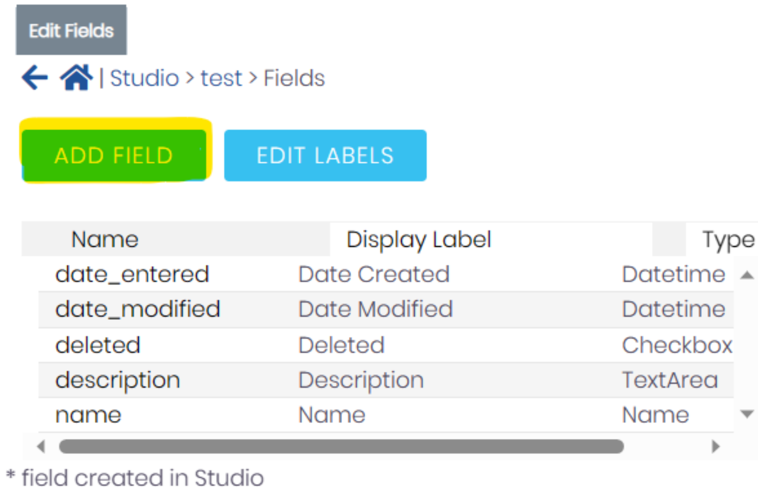
Clicking **CHANGE MODULE NAME** will allow you to change the label for the module itself. See the Rename Modules section of the Developer Tools documentation for more details.

5.10.8. Fields

You can also rename default fields from the template.

The user will have to choose the following option -

- Go To Admin
- Go To Sudio
    - Selected recently created or any module that you want to customize
    - Go To Field option
    - Click "Add Field"



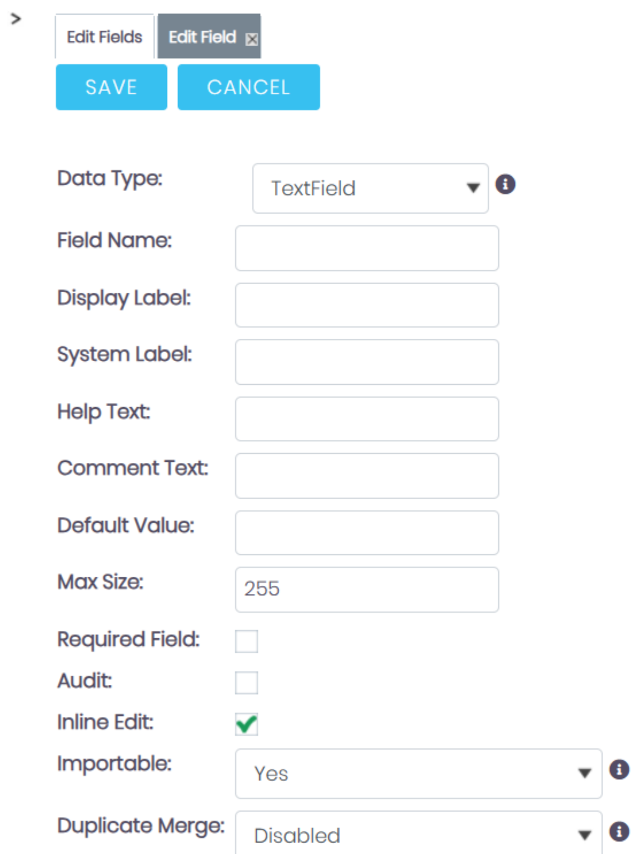
After clicking on the Add Field button the user will be able to add/edit/delete the fields.

- **Field Options**

To add new field, you have to select the data type first by clicking on the data type dropdown option -

- **Data Type** - The type you select determines what kind of characters can be entered for the field. For example, only numbers that are integers may be entered into fields that are of the Integer data type.
- **Field Name** - The field name must be alphanumeric and must not contain any spaces. Underscores are valid.
- **Display Label** - The label which will be displayed alongside the field in the views.
- **System Label** - This label is used to refer to the field in the code.
- **Help Text** - Optional explanatory text to display temporarily when the user hovers over the field.
- **Comment Text** - This is only visible in Studio and Module Builder, as a description for administrator use.
- **Default Value** - The field will have the value set here unless the user enters a new value.
- **Max Size** - The maximum number of characters that can be entered into the field.
- **Mass Update** - Enable mass Update feature for this field.
- **Required Field** - Whether or not a value must be entered for the field before a record containing the field can be saved.

- **Audit** - If this is selected, changes made to the field value can be tracked from the record's Change Log.
- **Inline Edit** - Whether or not the field can be edited inline, when this option is enabled in the System Settings.
- **Importable** - Select an option to allow, disallow or require the field to be imported when using the Import Wizard.
- **DuplicateMerge** - Select an option to enable or disable the Merge Duplicates and Find Duplicates features.



- Field Types

Studio comes out-of-the-box with many different types of fields which can be created in SimpleCRM.

The following data types are available when creating fields in Studio:

- **Address** - Creates fields for street, city, postal code, state, and country. Custom address fields cannot be grouped together like stock address fields (e.g. billing address)

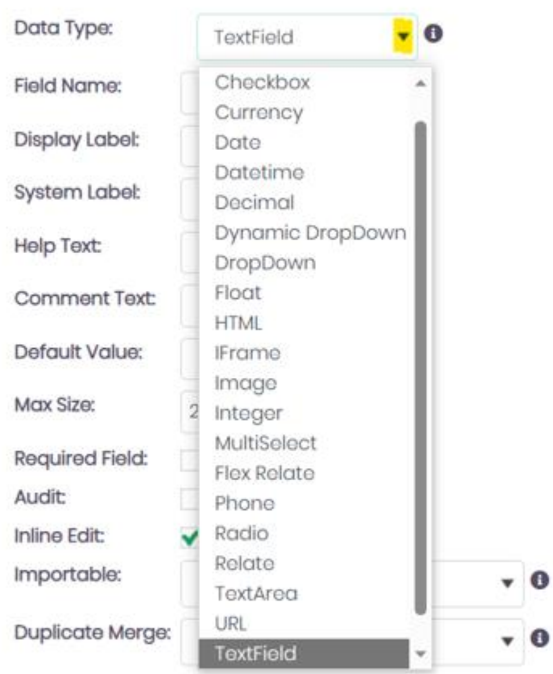
- **Checkbox** - Creates a checkbox for data fields with a Yes/No action
- **Currency** - Creates a field to enter a currency value. The system automatically creates a dropdown of the currency type if the field does not already exist in that module
- **Date** - Creates a field to enter a date. Includes a button for a calendar popup
- **DateTime** - Creates a field to enter the date and time. Includes a Calendar icon button to choose a date via the popup calendar, as well as a dropdown list to select the time
- **Decimal** - Creates a field to hold a number rounded to a specified decimal precision. SimpleCRM stores the exact representation of the number in the database (e.g. For a precision of 2: 2.539 is stored as 2.60)
- **DropDown** - Creates a field where you can associate a dropdown list of values
- **DynamicDropdown** - Creates a dropdown list from which you can relate a single record from a variety of modules.
- **Flex Relate** - To specify a one-to-many relationship with another module, but allows linking to several kinds of modules. For example, Notes use a Flex Relate so they can be related to Accounts, Contacts, Leads, etc. Only one Flex Relate-type field is allowed per module, which explains why you can't add another field of this kind to the Accounts, Calls, Meetings, Notes, and Tasks modules.
- **Float** - Creates a field to hold a number rounded to a specified decimal precision. SimpleCRM stores the value differently based on the database platform SimpleCRM is running on
- **HTML** - Creates static HTML-formatted text to display in record views
- **IFrame** - Creates a field to store a URL to display in an iFrame in record views. This URL can also be generated dynamically from data in other fields.
- **Image** - Creates an image field to upload an image to display on a record
- **Integer** - Creates a field to specify positive or negative numbers with no decimal places
- **Multiselect** - Creates a dropdown list of values where multiple values can be selected at once
- **Phone** - Creates a field to enter a phone number
- **Radio** - Creates a radio button for a user to select one value from a dropdown list

- **Relate** - Creates a field to associate a record with another module's record as a one-way relationship. You can add multiple Related fields to a module. *(Related fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other. Related fields can be added to a report, but any data on the related record cannot be accessed in the report. To access related record data in a report you will need to create a custom relationship)*

- **TextArea** - Creates an open text area field for multiple lines of text

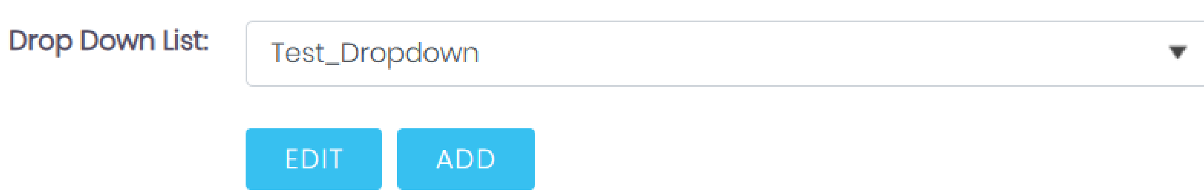
- **URL** - Creates a field to store a URL and display as a clickable link. This URL can also be generated dynamically from data in other fields.

- **TextField** - Creates a field for a single line of text

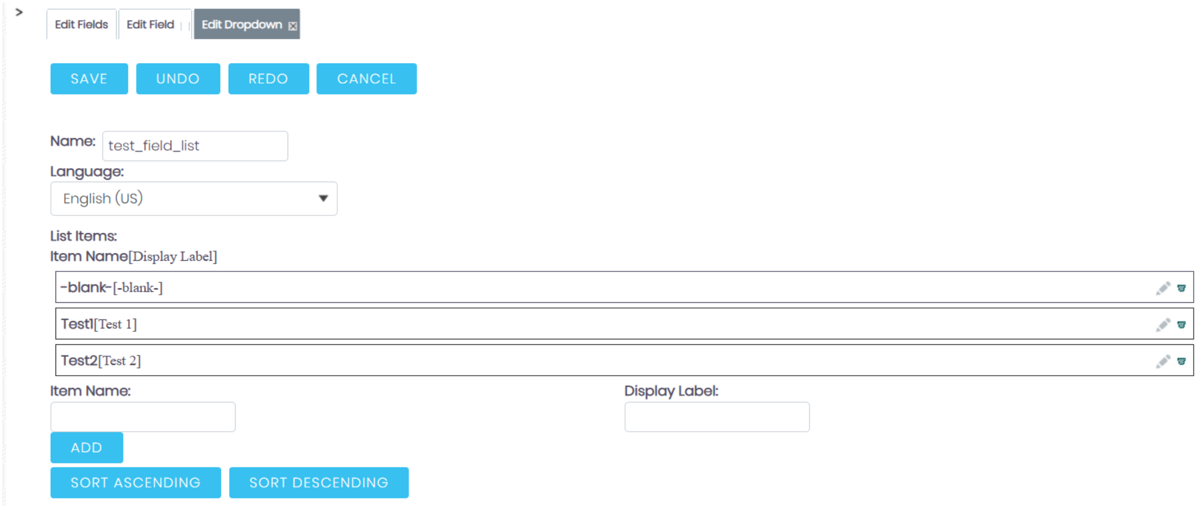


- **Adding a Dropdown Field**

When adding a field of type DropDown, you need to additionally specify the dropdown list. This contains the list items which will be displayed for the dropdown.



You can select an existing dropdown list if appropriate, or click **ADD** to create a new one.



For each item to include in the list, enter:

- **Item Name** - Used to refer to the dropdown item in the code, this must be alphanumeric, begin with a letter and contain no spaces.
- **Display Name** - The text shown to the user. This may contain spaces and special characters

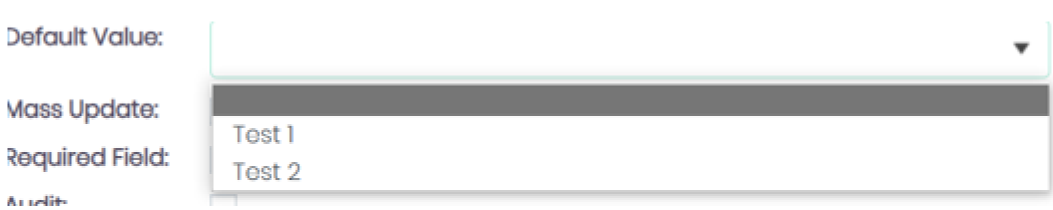
Click **ADD** to add each new entry.

To add a blank item, click **ADD** without entering any values for the Item Name and the Display Label. It is not possible to add a blank name, but with a non-blank label.

The list can be optionally sorted alphabetically by the Display Label by clicking the appropriate **SORT** button. If you want to set a default item, this is not the place to configure that; instead, look for a "default value" option in the settings for the field that will be using this dropdown.

Click **SAVE** to save the new dropdown list and return to the field properties.

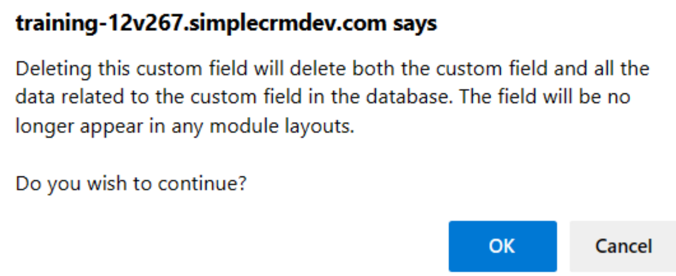
The dropdown list items you have created will now be visible. If desired, you can select a default value for the dropdown.



- **Editing A Field** - Click on a field to view the field's properties. These can be edited in the same way as detailed above for adding a new field.

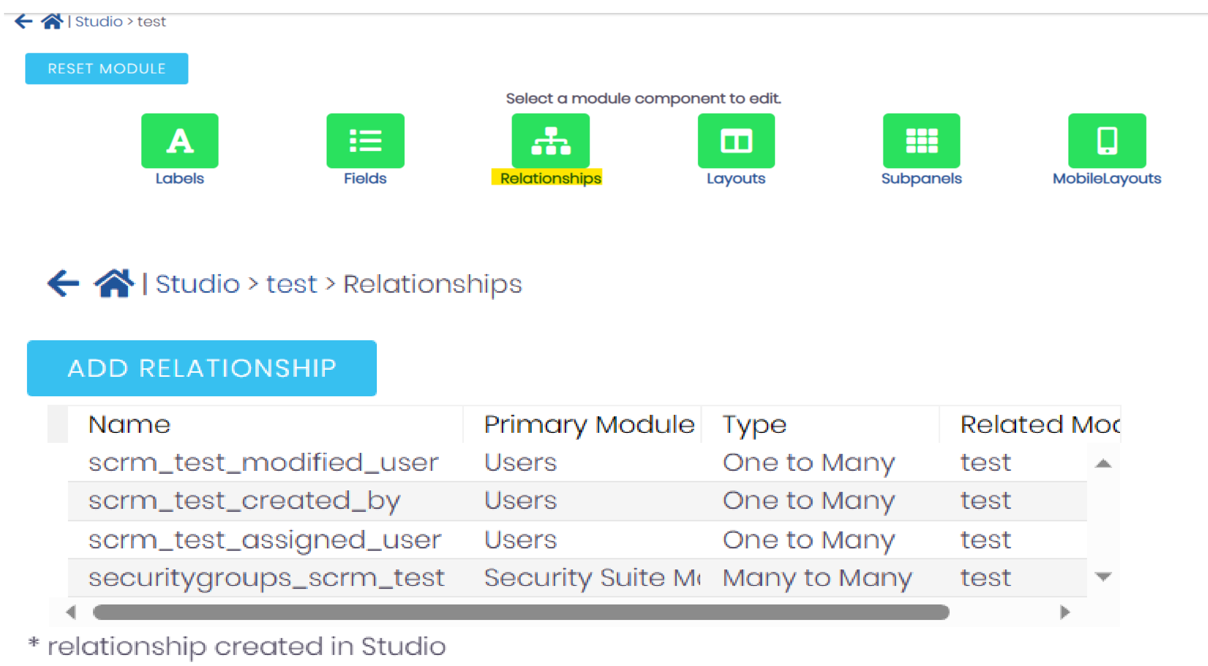
- **Deleting A Field** - Only fields that have been created in Studio can be deleted via Studio. Core fields cannot be deleted.

Select the field you wish to delete and click **DELETE**. A warning message will appear asking you to confirm the deletion as both the field and any data related to the custom field will be deleted from the database and the field will no longer appear on any module views.



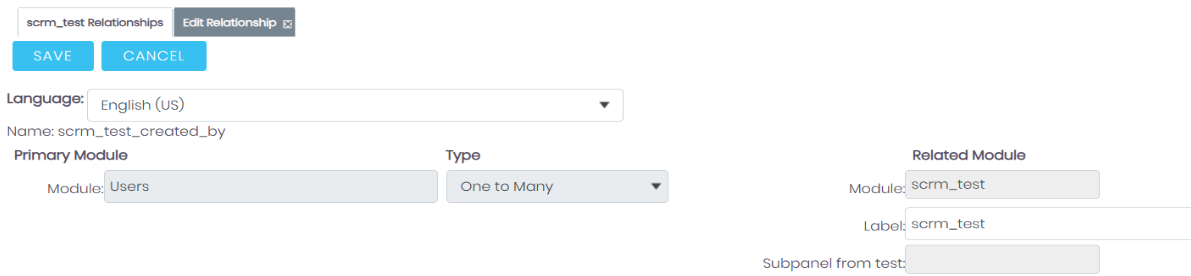
5.10.9. Relationships

A relationship represents a two-way link between two modules. Selecting the Relationships component displays all the relationships between the currently selected module and other deployed modules.



Click on a relationship to view the relationship properties.

Click **ADD RELATIONSHIP** to add a new relationship for the selected module.



The Primary Module will be set to the currently selected module.

Specify the relationship type:

- **One to One**

With a One-to-One relationship, each record in the primary module may only have one related record in the related module, and vice versa. This type of relationship will add a related field to both modules' records.

- **One to Many**

With a One-To-Many relationship, records in the primary module may be related to one or more records in the related module, but each related module record is only related to one primary module record. This will add a related field to the related module's records, but the primary module will display a subpanel where more than one related module records can be added.

- **Many to Many**

With a Many-To-Many relationship, records in the primary module can be related to one or more records in the related module, and vice versa. Each module's records will contain a subpanel for the related records.

Select the Related Module from the dropdown list.

Where there are subpanels, subpanel views for the module(s) can be selected.

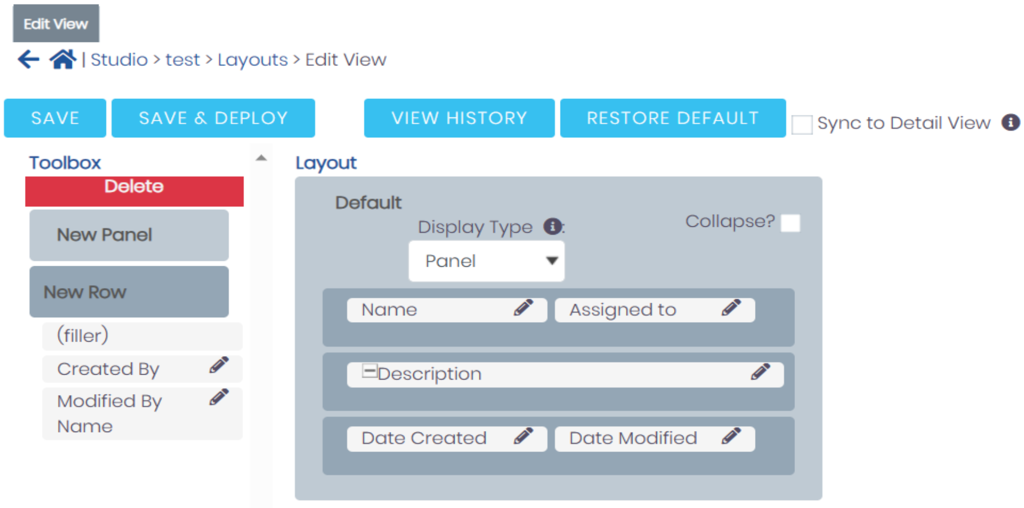
Click **SAVE AND DEPLOY** to save the relationship.

5.10.10. Layouts

Layouts can be edited in Studio to customize the module views shown to users.

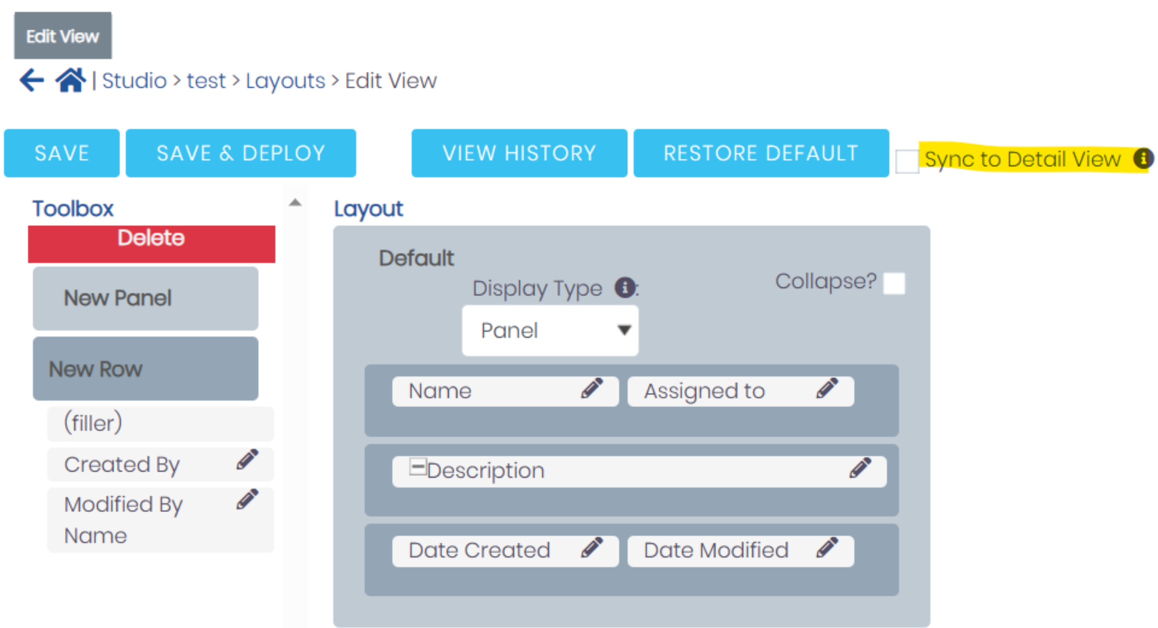
5.10.11. Edit View

Edit view is displayed when editing a record or creating a new one.



The current layout is displayed in the main panel on the right-hand side. Unused fields are shown in the list on the left hand side.

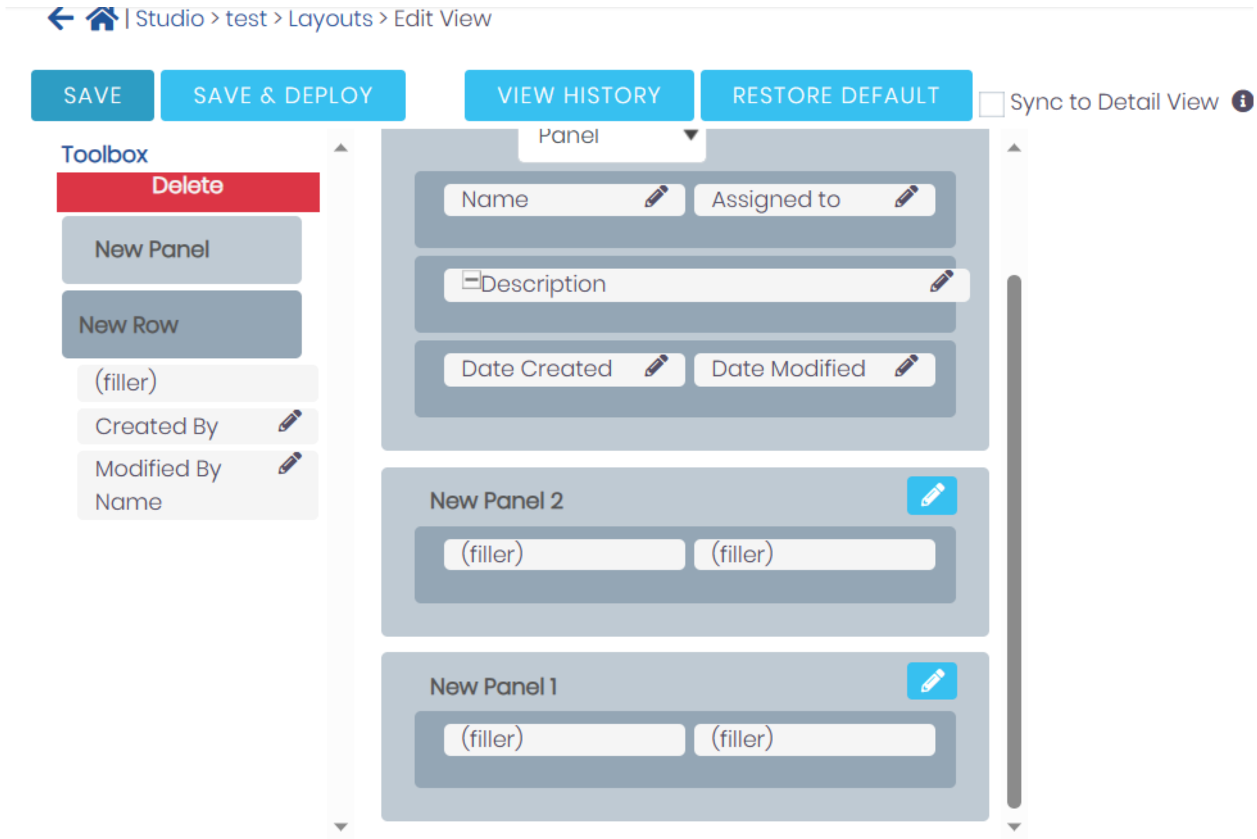
Tip - Select Sync to Detail View if you wish any changes made to fields or field placement to be automatically applied to the corresponding Detail View. Note that layout changes cannot be made to the Detail View when this option is set.



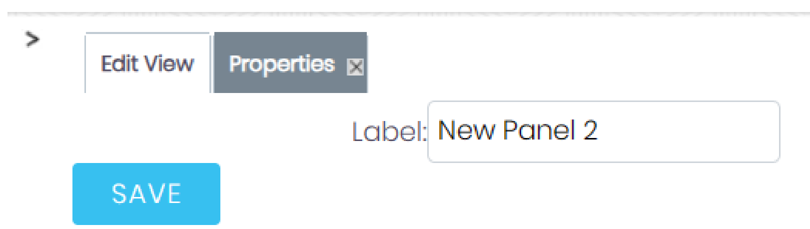
5.10.12. Adding Fields

Fields can be added to the view either as a new row in an existing panel (section), or by adding a new panel.

Click and drag the **New Row or New Panel element** to the desired location in the layout on the right-hand side.



If you have added a new panel, this can be renamed by clicking the pencil icon. This will open the edit view for the panel label. Edit the label and click SAVE to return to the layout.



A new row will automatically be created with two columns.

Drag and drop the required fields to the new row. Clicking the + button will span the field across both columns.

Click SAVE AND DEPLOY to save the layout changes. These should now be visible when you navigate to the Edit view for the module.

5.10.13. Removing Fields

Delete fields, rows or panels from the layout by dragging them to the Delete area on the left-hand side.

Click SAVE AND DEPLOY to save the layout changes.

5.10.14. Detail View

Detail View is a read-only view, shown when a record is opened.

The Detail View layout can be edited in exactly the same way as for the Edit View. Note that if you have Sync to Detail View selected on the Edit View, you will not be able to make changes to the Detail View.

5.10.15. List View

The List View is shown when a module is opened, and lists all the records in the module.

Customize which fields are shown in the list view, and the order in which they are displayed here.

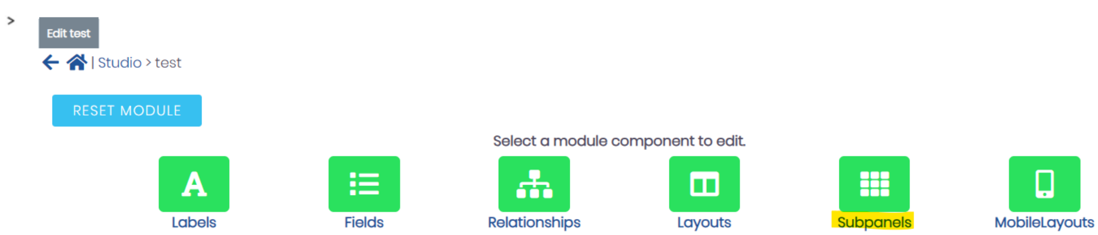
- **Default** - Fields in this column will be shown by default in the list view. Reorder by dragging and dropping the field names.
- **Available** - Fields in this column are available for users to add to the list view using the Column Chooser button on the list view.
- **Hidden** - these fields are hidden from users and cannot be added to the view.

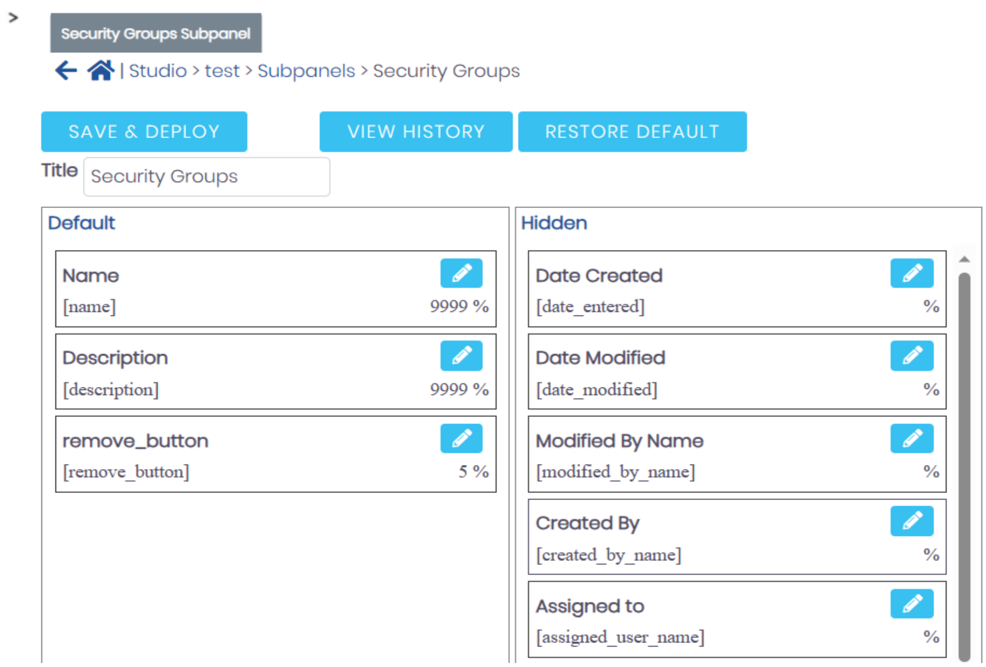
Drag and drop the module fields between the columns to customize the list view.

5.10.16. Subpanels

Use this section to customize which fields are shown on a particular subpanel.

Select the subpanel. Fields shown in the Default column will be shown on the subpanel. Drag and drop the required fields between the two columns. Click **SAVE & DEPLOY**.

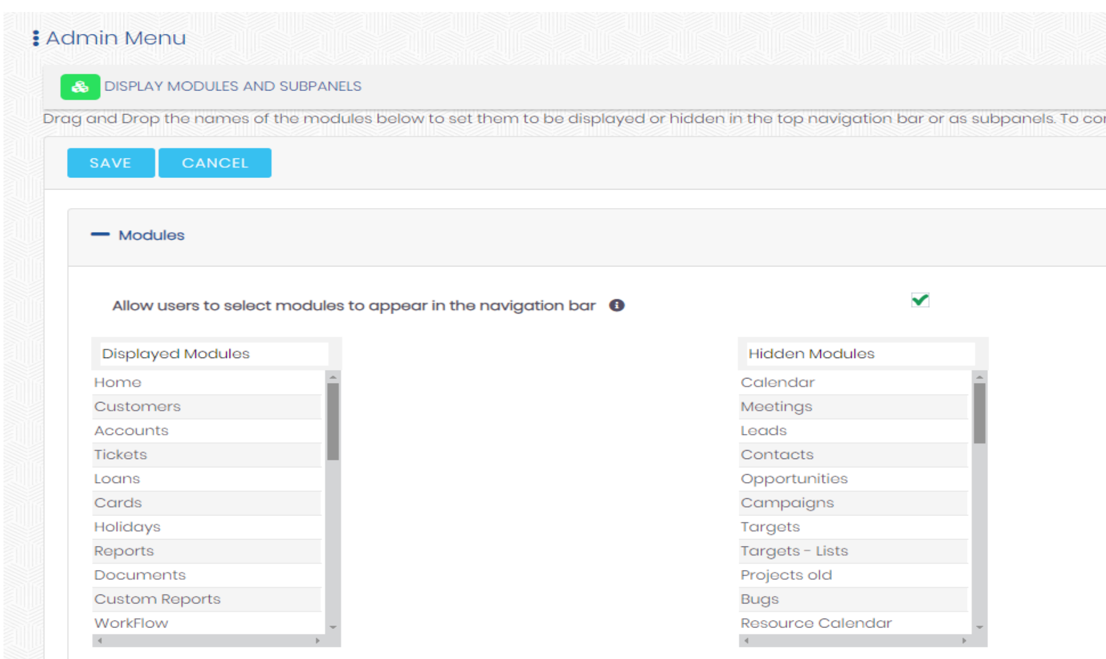




5.10.17. Display Modules and Subpanels

Control which modules and subpanels are visible in SimpleeCRM by dragging and dropping modules or subpanels between the Displayed and Hidden columns.

This will show or hide modules in SimpleCRM for all users. Should you wish to control access to particular modules, this can be done using Role Management. See Roles and Security Groups for more information

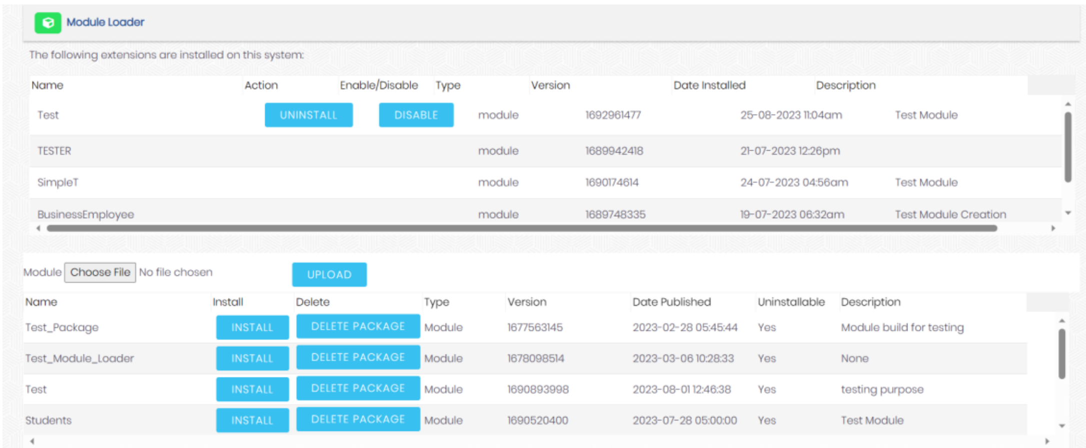


Allow users to select modules to appear in the navigation bar - Selecting this option allows users to customize which module tabs are visible from their User Settings.

5.10.18. Module Loader

Module Loader allows you to install and manage custom modules or plugins for your SimpleCRM instance.

Custom module packages that have been created and modified in Module Builder will be displayed in Module Loader once they have been deployed.



Modules and packages that are already installed are listed in the top pane. The lower panel is used to upload packages and will list any package that is uploaded but not yet installed.

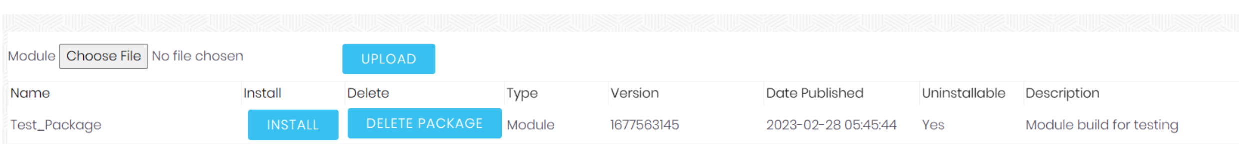
5.10.19. Upload and Install a Package

Click Choose File and browse for the package .zip file. Click **UPLOAD**

Once uploaded, the package details will appear in the lower pane, including the version number, a short description and whether or not the module can be uninstalled.

UNINSTALL and **DELETE PACKAGE** options will appear.

Click **INSTALL** to install the module.



On the next screen, if there are no problems detected with the package and it is ready to install you will be asked to click COMMIT to complete the installation.

If any errors occur during installation, they will be displayed here. Otherwise, clicking the Display Log link will detail the steps taken in the installation process.

5.10.20. Uninstall a Package

For a package to be uninstallable it needs to be defined as uninstallable in the package manifest file. For more information regarding the manifest file see the Developer Guide

Uninstall a package by clicking the buttons next to the package name.

As with the install procedure, you will be asked to confirm the uninstall on the next screen. If the package adds any tables to your database, you will be asked if you wish to keep these, and any data within them, for example if you are replacing an older version of a module with a new one.

Click **COMMIT** to uninstall the package

If any errors occur during the uninstall they will be displayed here. Otherwise, clicking the Display Log link will detail the process.

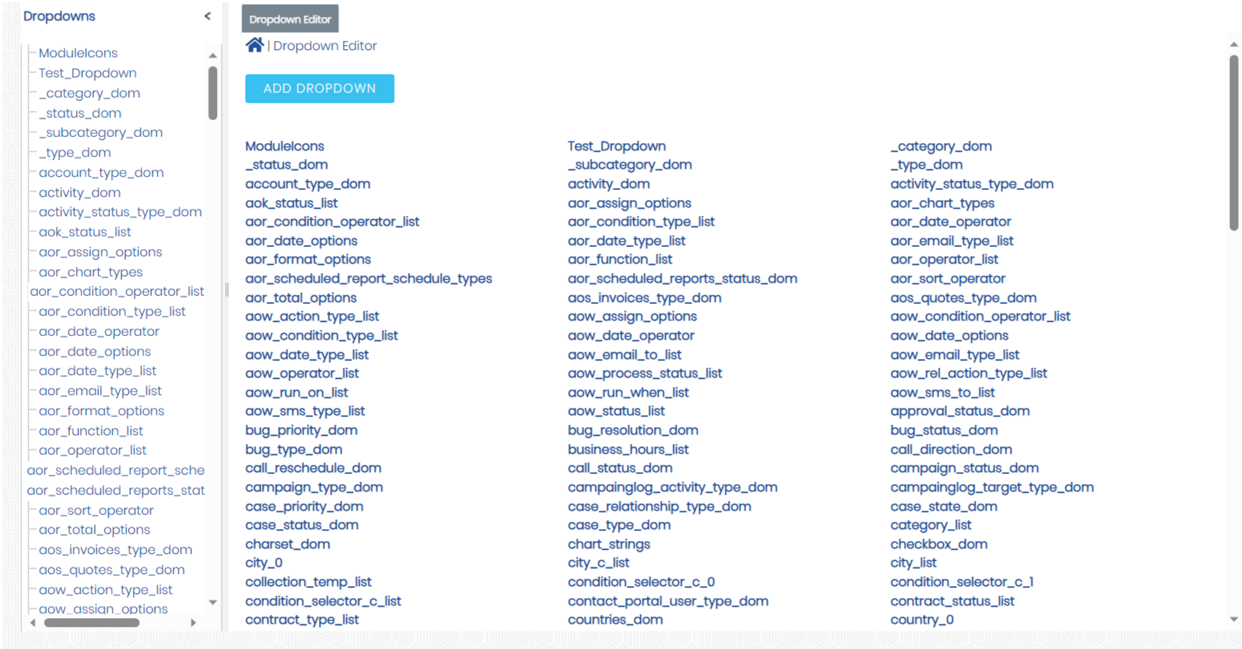
Click **BACK TO MODULE LOADER** to return to the Module Loader screen where the newly installed package will appear in the list of installed extensions

An uninstalled module will be listed in the lower panel from where it can be re-installed or deleted.

5.10.21. Dropdown Editor

The Dropdown Editor shows all the dropdown lists currently installed on the system.

Click on the dropdown name to edit it. If you are unsure which dropdown you require, it can be easier to edit via Studio where you can find the dropdown by its field name. See the Studio guide for full instructions on adding or editing a dropdown list.

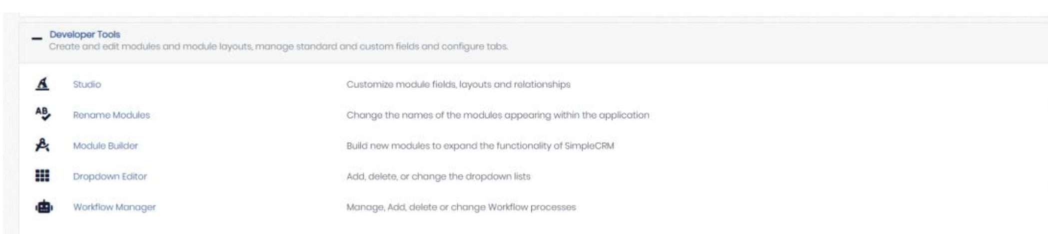


5.11. Workflow Manager

The following steps on how to create, configure, and manage calculated fields using workflows in SimpleCRM. Calculated fields allow you to perform calculations based on the values of other fields and automatically populate the result in a designated field.

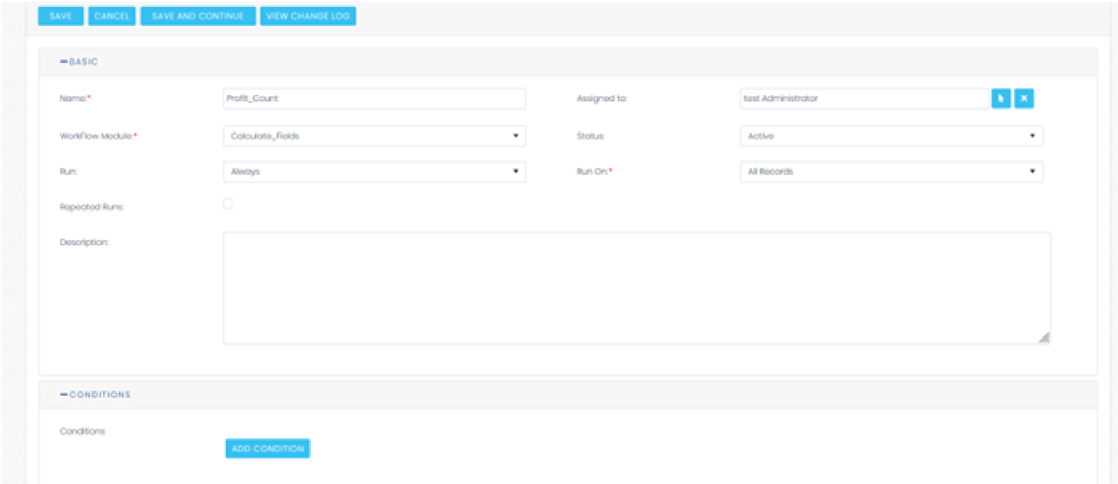
Before configuring calculated fields via workflows, ensure the following prerequisites are met:

- Add the necessary fields in the module for which you wish to configure the calculated fields workflow.
- Check the data type of the fields being used. For example, addition or subtraction fields can be of the data type Integer, while fields involving division and potential decimal values should have the data type Float.

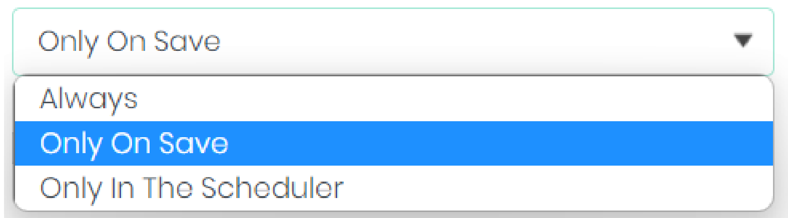


5.11.1. Configuration Steps to be followed

1. Name: Provide a name for the workflow for future reference. This name will be visible in the workflows main page, making it easier to access and edit the workflow later.
2. Workflow Module: Choose the module for which you want to execute this workflow.
3. Assigned To: Select the person to whom you wish to assign this workflow from the list of employees.

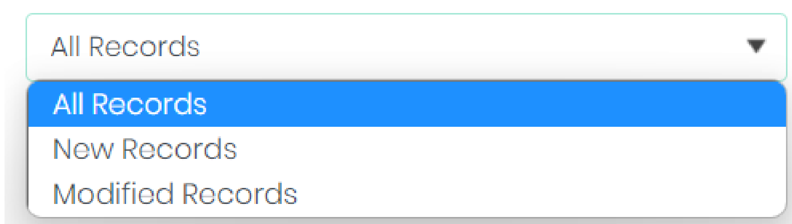


4. Run: Select one of the following options:



- Always: The workflow will run every time the conditions are satisfied.
- Only ON Save: The workflow will be executed when the user saves the created record.
- Scheduler: Use this option when you want to execute the workflow based on a scheduler.

5. Status: Set the status of the workflow as Active or Inactive. It is recommended to keep the workflow inactive until it is ready for use to avoid unwanted executions during the construction phase.
6. Run On: Choose one of the following options:



- All Records: The workflow will run on every created record.
- New Record: The workflow will only run when a record is created for the first time.
- Modified Record: The workflow will be executed whenever an existing record is edited or modified.

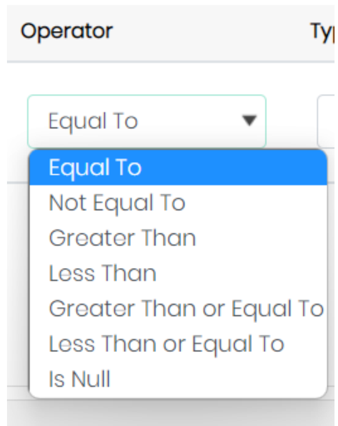
7. Repeated Runs: Select this checkbox if you want the workflow to execute multiple times for the same entity, even if the record is modified multiple times.

5.11.2. Conditions

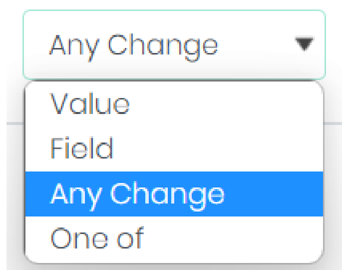
1. Select the module for which you want to set up conditions.

2. Choose the field on which you wish to apply the condition.

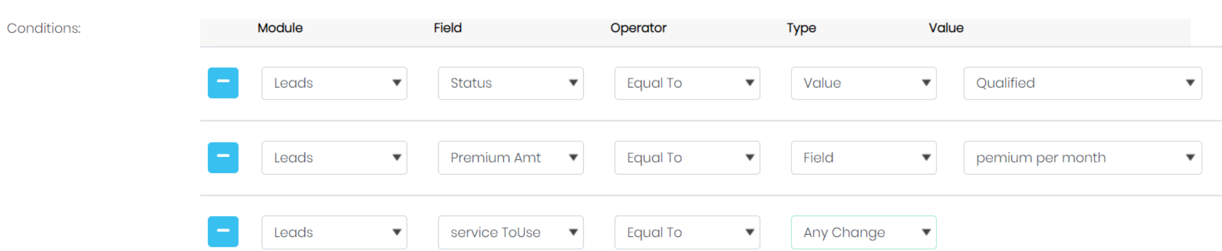
3. Select the operator that matches your requirement, such as "equal to or greater than."



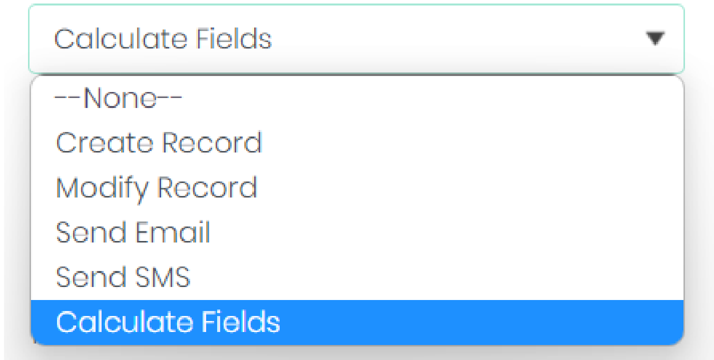
4. Based on the selected field, the Type column will activate, offering four options:



- Value: Trigger the workflow only when a specific value is entered in the field.
- Field: Run the workflow based on the relationship between the selected field and another field in the same module.
- Any Change: Execute the workflow on any change made to the selected field.
- One Of: Trigger the workflow for specific values selected from a dropdown list.

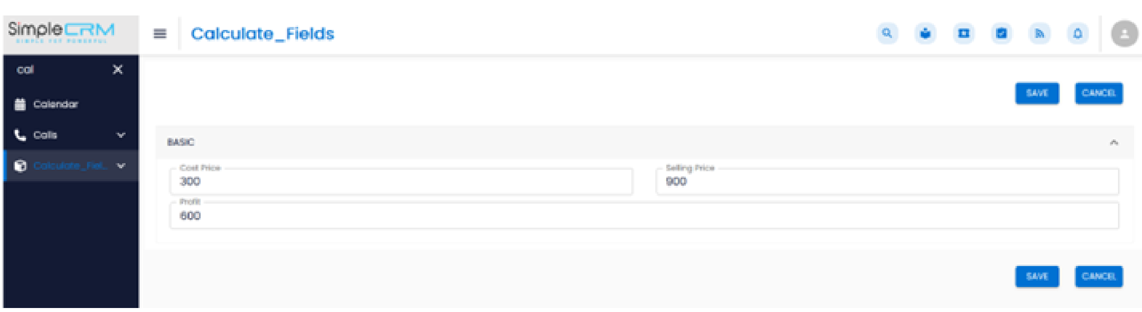


5.11.3. Adding Calculated Fields



1. Add an action and select "Calculated Fields."
2. A dialog box to add parameters will appear. Select the fields for which you want to perform calculations.
3. The value type and identifier will be automatically populated based on the selected fields.
4. Relation parameters work similarly to regular parameters but involve selecting an entity that is in a one-to-one or one-to-many relationship with the actual entity.
5. For some relation parameter fields (e.g., dropdowns and multi-selects), an additional dropdown will appear, allowing you to choose whether to use the raw or formatted value in the calculated fields.
6. In the formula field, enter the field where you want the calculated result to be reflected.
7. Input the required formula, replacing the parameters with the identifiers as required by the function. For example, subtract the cost price from the selling price to calculate the profit field.
8. Once the workflow is constructed, save it from the bottom right corner.

5.11.4. Front End Calculated Field Result



5.11.5. Commonly Used Formulas

Signature	{equal(parameter1;parameter2)}
Parameters	parameter1: can be any value of any type
	parameter2: can be any value of any type
Description	Determines if **parameter1** equals with **parameter2**
Returns	1 if the two parameters are equal or 0 if not
Example Call	{equal(1; 2)} returns 0

Signature	{add(parameter1; parameter2)}
Parameters	parameter1: number value
	parameter2: number value
Description	Adds **parameter1** and **parameter2**
Returns	The sum of **parameter1** and **parameter2**
Example Call	{add(3.12; 4.83)} returns 7.95

Signature	{subtract(parameter1; parameter2)}
Parameters	parameter1: number value
	parameter2: number value
Description	Subtracts **parameter2** from **parameter1**

Returns	The distinction of **parameter2** and **parameter1**
Example Call	{subtract(8; 3)} returns 5

Signature	{multiply(parameter1; parameter2)}
Parameters	parameter1: number value
	parameter2: number value
Description	Multiplies **parameter1** and **parameter2**
Returns	The product of **parameter1** and **parameter2**
Example Call	{multiply(2; 4)} returns 8

Signature	{divide(parameter1; parameter2)}
Parameters	parameter1: number value
	parameter2: number value
Description	Divides **parameter2** with **parameter1**
Returns	The division of **parameter2** and **parameter1**
Example Call	{divide(8; 2)} returns 4

Signature	{power(parameter1; parameter2)}
Parameters	parameter1: number value
	parameter2: number value

Description	Raises **parameter1** to the power of **parameter2**
Returns	**parameter1** raised to the power of **parameter2**
Example Call	{power(2; 7)} returns 128

5.11.6. Sample Use Case

In this use case, we will explore an example of an insurance company that wants to automate the calculation of monthly premium based on the yearly premium provided by the user. Additionally, they also wish to calculate the premium ratio, which is determined by dividing the total life cover by the yearly premium. The goal is to have the monthly premium and premium ratio calculated automatically whenever the user enters the premium amount and life cover, and saves the record.

5.11.7. Workflow Configuration

To achieve this automation, we will configure a workflow with the following steps:

1. Conditions: In this example, conditions are set merely to trigger the workflow. Therefore, we will equate the same fields to each other. Please note that in actual scenarios, you would set conditions based on specific requirements or business rules.
2. Calculated Fields: Add an action to calculate the monthly premium and premium ratio.
    - Monthly Premium: Using the yearly premium field provided by the user, apply the appropriate formula to calculate the monthly premium amount.
    - Premium Ratio: Utilizing the total life cover and yearly premium fields, implement the necessary formula to calculate the premium ratio.
3. Save the Workflow: Once the workflow is constructed, save it to ensure the automation is enabled.

By implementing this workflow, whenever a user enters the premium amount and life cover and saves the record, SimpleCRM will automatically calculate the monthly premium and premium ratio. This streamlined process saves time and ensures accurate calculations for the insurance company.

Note: The provided example conditions were used solely for the purpose of triggering the workflow. In real-world scenarios, you would define conditions based on specific business rules and requirements.

— BASIC

Name:*	Calculate Premium & Ratio	Assigned to:	Arnav Hardas
WorkFlow Module:*	Leads	Status:	Active
Run:	Only On Save	Run On:*	All Records
Repeated Runs:	☐		

— CONDITIONS

Conditions:

Module	Field	Operator	Type	Value
Leads	Premium Amt	Equal To	Field	Premium Amt
Leads	Life Cover Amt	Equal To	Field	Life Cover Amt

Actions:

Select Action: Calculate Fields

Name:

Parameters

Field name	Value type	Identifier
Premium Amt	Raw value	{P0}
pemium per month	Raw value	{P1}
Life Cover Amt	Raw value	{P2}
Premium Ratio	Raw value	{P3}

Formulas

Field name	Formula
pemium per month	{divide({P0}; 12)}
Premium Ratio	{divide({P2};{P0})}

5.11.8. Front End Calculated Field Result

NEW PANEL 1

Premium Amt	36,000.00	pemium per month	3,000.00
Life Cover Amt	1200000	Premium Ratio	33.33333206

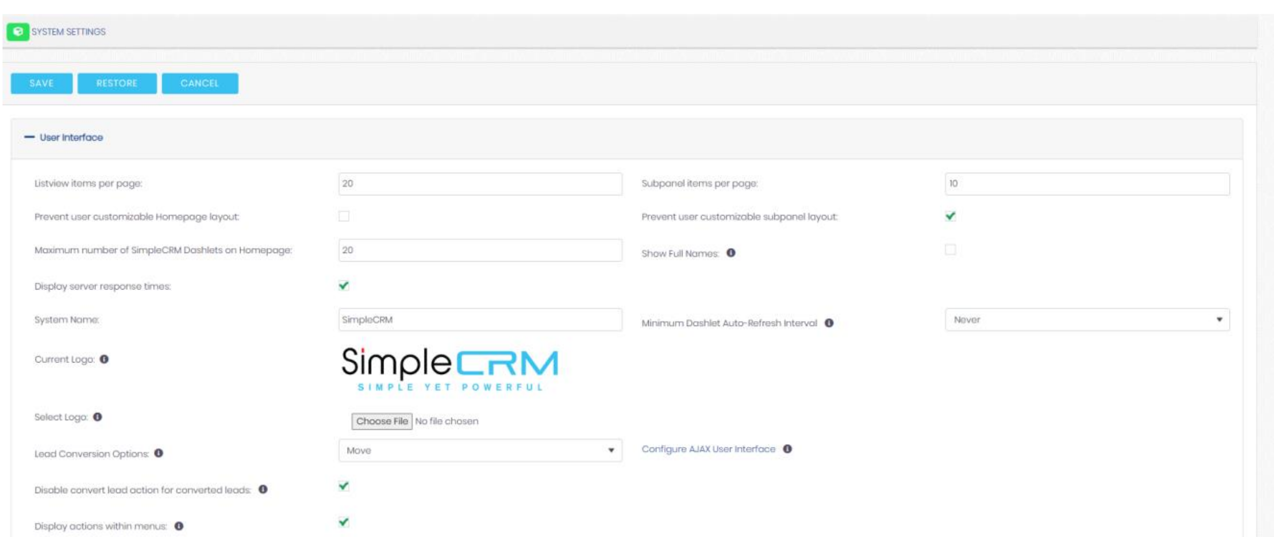
5.11.9. Conclusion

By following these steps, you can configure calculated fields via workflows in SimpleCRM. This automation will streamline your data processing and ensure accurate calculations. Should you require further assistance or have any questions, refer to the CRM system documentation or contact our support team.

5.12. System Settings

System
Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings
Currencies	Set up currencies and conversion rates
Languages	Manage which languages are available for users
Locale	Set default localization settings for your system
PDF Settings	Change PDF Settings
Search Settings	Configure the global search preferences for the system
Elasticsearch	Configure Elasticsearch preferences
Scheduler	Set up scheduled events
Themes	Choose themes for users to be able to select



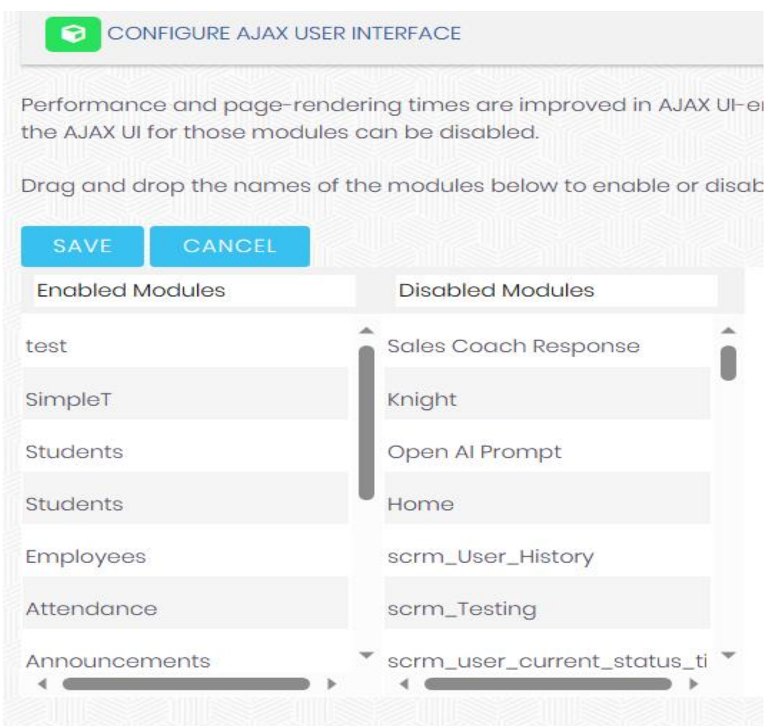
5.12.1. User Interface

These user interface settings apply system-wide, although some (for example Show Full Names) can be overridden by individual users in their user profile.

- **Listview items per page** - The number of records to display per page in the list view of each module.
- **System Name** - This name will be displayed on the browser tab.
- **Current Logo** - This shows the logo currently displayed on the login screen
- **Select Logo** - Click Choose file to select logo file. Images can be .png or .jpg format.
- **Lead Conversion Options** - Display actions within menus
- **Enable inline editing** - Enables records to be edited from list or detail view by double clicking on the item to be edited.
- **Show Full Names** - Displays full names for users, rather than usernames in Assigned To fields.

5.12.2. Configure AJAX User Interface

Click the Configure Ajax User Interface link to display the configuration options.



Drag and drop modules between the columns to enable/disable AJAX.

5.12.3. Proxy Settings

Select the Use Proxy server? checkbox to configure proxy server address and authentication settings.

5.12.4. Google Authentication

This is where you upload the JSON credential file for Google Calendar Sync.

See the Google Credentials and Syncing Section.

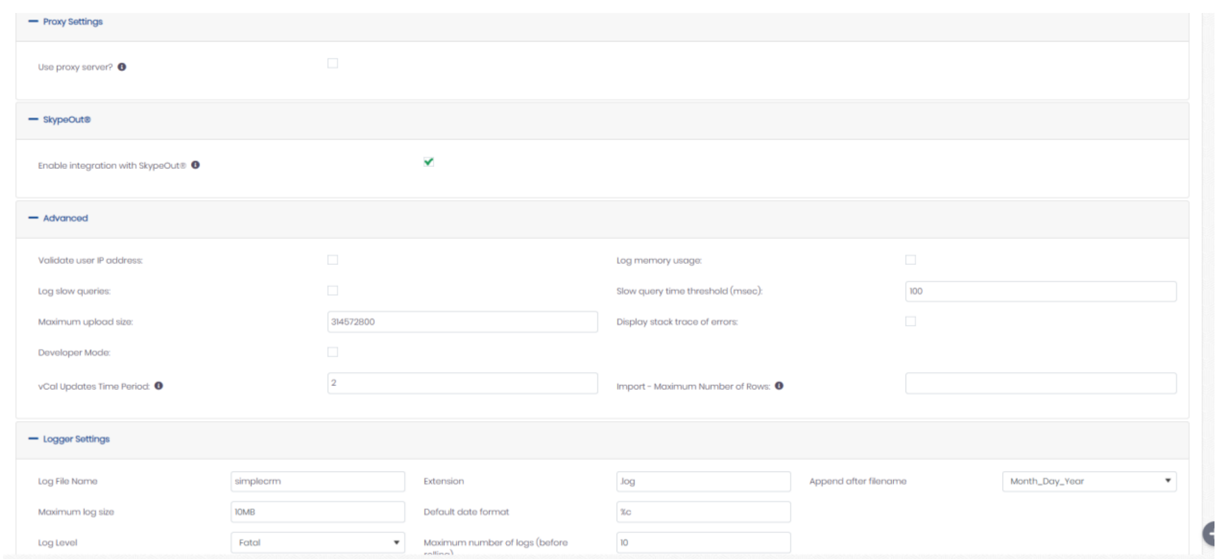
5.12.5. Advanced Settings

- **Developer Mode** - Turns off caching so that code changes to files will be seen immediately. See the Developer Guide for more information.
- **vCal Updates Time Period** - Set the number of months in advance to show free/busy information for invitees when scheduling calls and meetings.

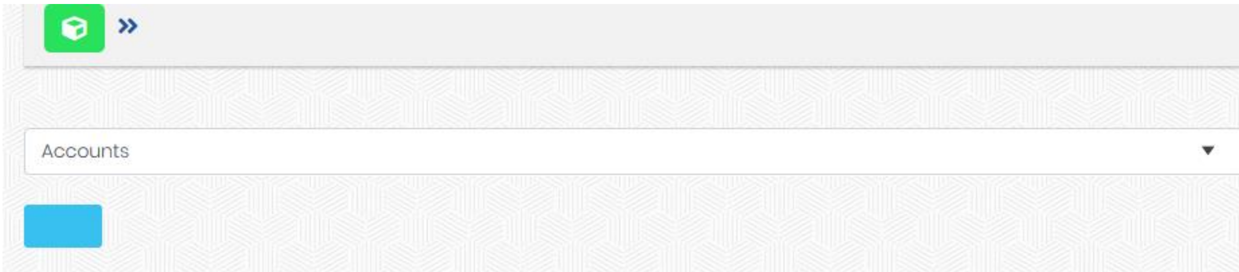
5.12.6. Logger Settings

Specify log filename, extension and size as well as the log level here. See the chapter on logging for more information.

Click the View Log link to view the log file.



5.12.7. Import Wizard

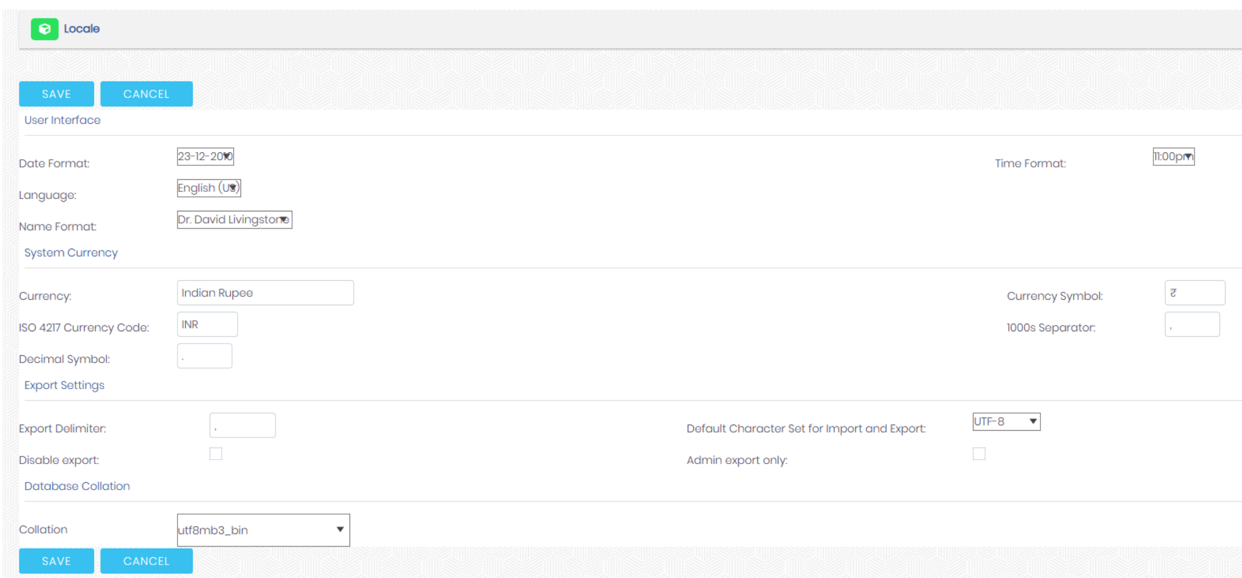


The Import Wizard is also available from the sidebar of all import-enabled SimpleCRM modules. Select the module to import data into and click **NEXT >** to launch the wizard.

See the Importing Records section for more information on importing records.

5.12.8. Locale

Set system-wide settings for locale here, including date and time formats, system currency and export settings. Currencies can be added to SimpleCRM via the Currencies panel.



5.12.9. Upgrade Wizard

The Upgrade Wizard provides a quick and simple way to upgrade your SimpleCRM application. Download the required upgrade package and check your system compatibility before running the wizard.

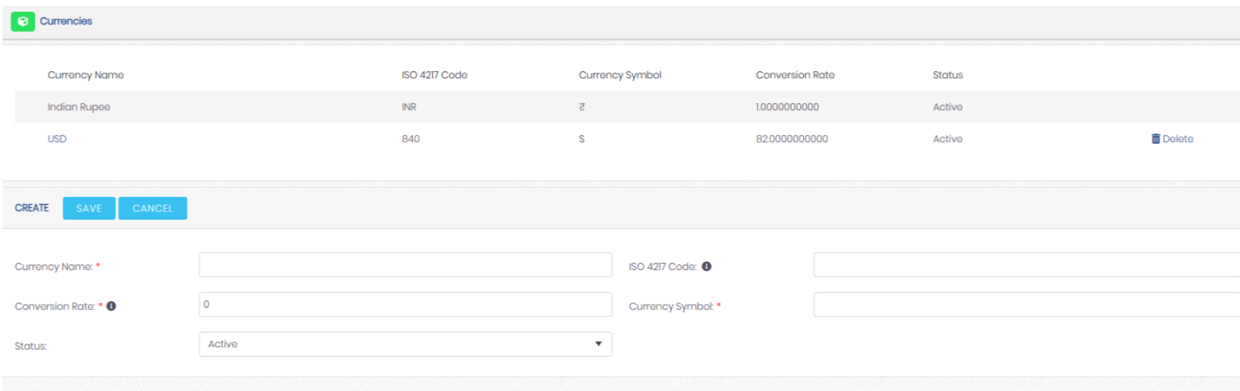
See Using the Upgrade Wizard for full instructions on upgrading.

5.12.10. Currencies

Use this section to add a currency to SimpleCRM. The default currency can be set in the Locale section.

Entering the ISO 4217 code for the currency will autofill the Currency Name and Currency Symbol fields.

You must also specify a currency conversion rate before saving the new currency settings.



5.12.11. Backups

The SimpleCRM application files can be backed up using this tool. Please note that you should also perform regular backups of your database - see the vendor's documentation for details on how to do this.

5.12.12. Languages

Download language packs for SimpleCRM here.

5.12.13. Repair

Selecting Repair from the System Settings panel displays a wide range of repair options for SimpleCRM which will run automatically when the link is clicked. SimpleCRM may direct you to run particular Repair commands, for example following an upgrade using the Upgrade Wizard.

Quick Repair and Rebuild is the most often used command here, and will be required after installing a new module via Module Loader for example, or to display changes to code during development when Developer Mode is not set.

When running a Quick Repair and Rebuild, be sure to scroll to the bottom of the page to view any new SQL code which may need to be executed to ensure that your database tables are correctly synced with any changes that have been made.

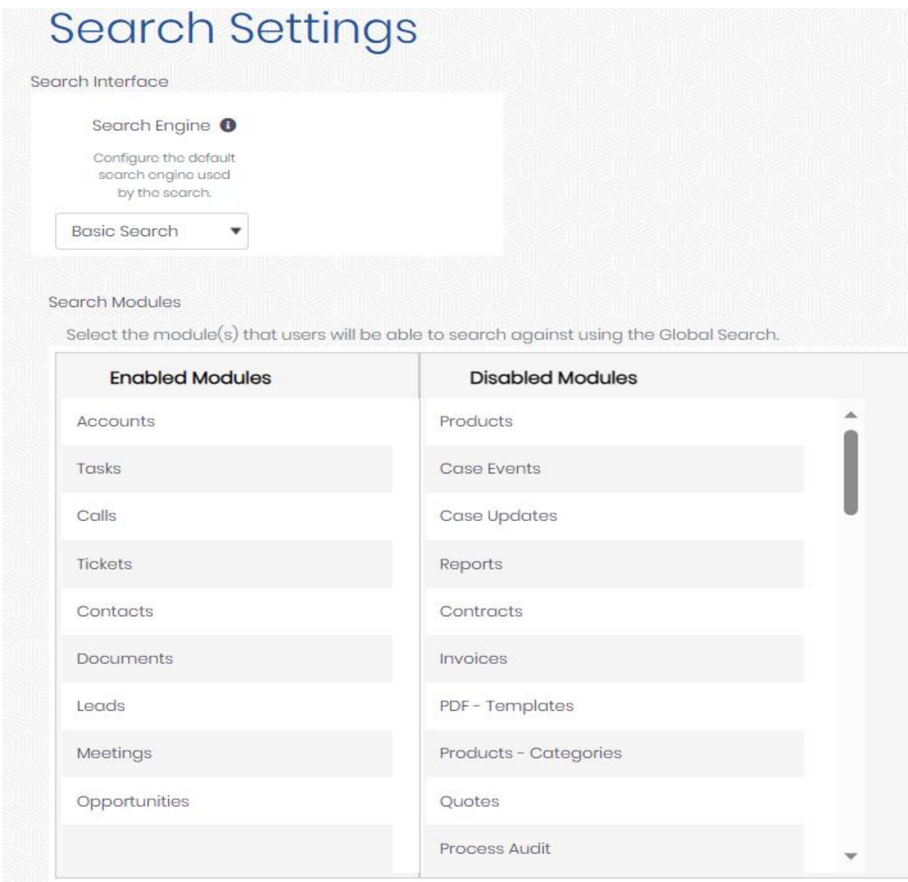
The following functions are available to you in the section:

- **Quick Repair and Rebuild** - Repairs and rebuilds DB, Extensions, Vardefs, SimpleCRM Dashlets etc.
- **Expand Column Width** - Expands certain char, varchar and text columns in database (MSSQL ONLY)
- **Rebuild .htaccess File** - Rebuilds .htaccess to limit access to certain files directly
- **Rebuild Config File** - Rebuilds config.php by updating version and adding defaults when not explicitly declared
- **Rebuild Relationships** - Rebuilds relationship metadata and drops the cache file
- **Rebuild Schedulers** - Rebuilds out-of-the-box Scheduler Jobs
- **Rebuild SimpleCRM Dashlets** - Rebuilds the SimpleCRM Dashlets cache file
- **Rebuild Javascript Languages** - Rebuilds javascript versions of language files
- **Rebuild JS Compressed Files** - Copies original Full JS Source files and replaces existing compressed JS files
- **Rebuild JS Grouping Files** - Re-concatenates and overwrites existing group files with latest versions of group files
- **Rebuild Minified JS Files** - Copies original Full JS Source Files and minifies them, then replaces existing compressed files
- **Repair JS Files** - Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files
- **Repair Non-Lowercase Fields** - Repair mixed-case custom table(s) and metadata file(s) to fix issues where code expects lowercase field names
- **Repair Roles** - Repairs Roles by adding all new modules that support Access Controls, and by adding any new Access Controls to existing modules
- **Repair Inbound Email Accounts** - Repairs Inbound Email accounts and encrypts account passwords
- **Sync Inbound Email Accounts** - Sync Inbound Email Accounts and Emails
- **Remove XSS** - Removes XSS Vulnerabilities from the database
- **Repair Activities** - Repairs Activities (Calls, Meetings) end dates

- **Enable/Disable Seed Users** - Quickly enable or disable seed users populated during demo installation.
- **Remove missed files from upload directory** - Please note that removal can take a lot of time

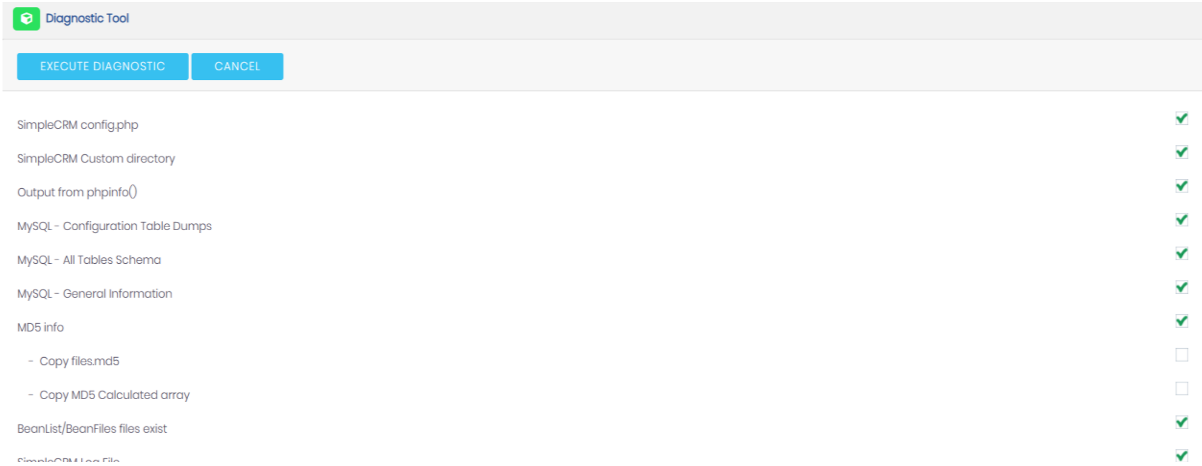
5.13. Search Settings

The Global Search functionality is used to search for records using the search bar on the main navigation menu. Add or remove modules from the Global Search here.
See the User Interface guide to the global search for more information.



5.14. Diagnostic Tool

The diagnostic tool allows you to gather system configuration information which can be downloaded via a .zip file for analysis.

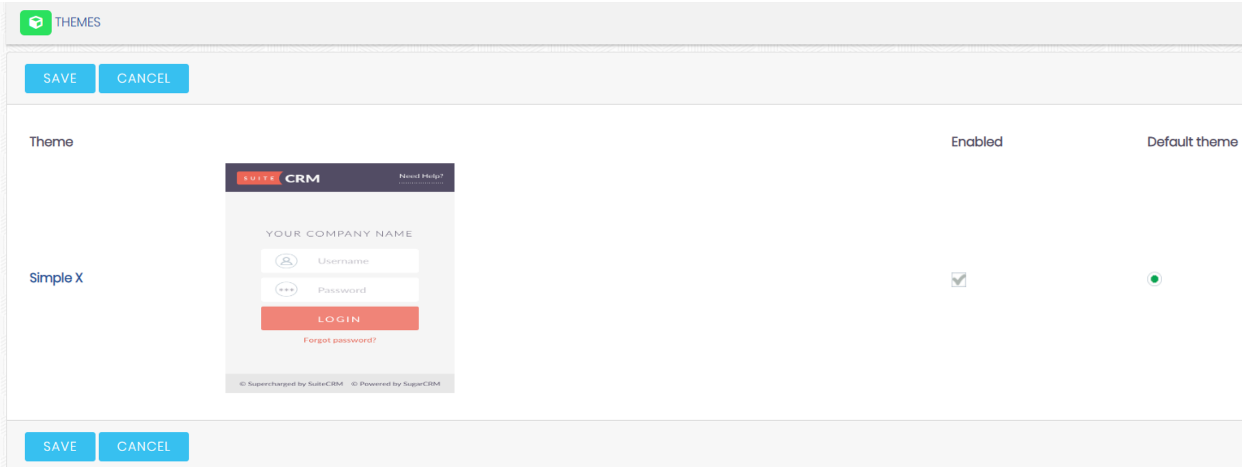


- **SimpleCRM config.php** - Includes a copy of the config.php file from the SimpleCRM root directory. This contains many of the system settings options such as date formats, currency information, password configuration alongside configuration details such as database settings and SimpleCRM version
- **SimpleCRM Custom directory** - Includes a copy of the custom directory, which contains any field or layout customisations made, either through Studio or via code.
- **phpinfo()** - Includes the output of the phpinfo() function, containing information about the php configuration on the server
- **MySQL - Configuration Table Dumps** - Includes a folder MySQL/Table Dumps in the diagnostic zip file with an html file for each configuration table in SimpleCRM. Each file contains field definitions (field names, data types etc), indexes (name, type and fields in the index) and data from the relevant table.
- **MySQL - All Tables Schema** - Includes the file MySQL/TableSchema/TableSchema.html with two sections for each table in SimpleCRM- field definitions (table name, data types etc) and indexes (name, type and fields in the index)
- **MySQL - General information** - Includes a file MySQL/MySQL-General-info.html containing database information such as version number and character sets

Select the information you require and click **Execute Diagnostic**.

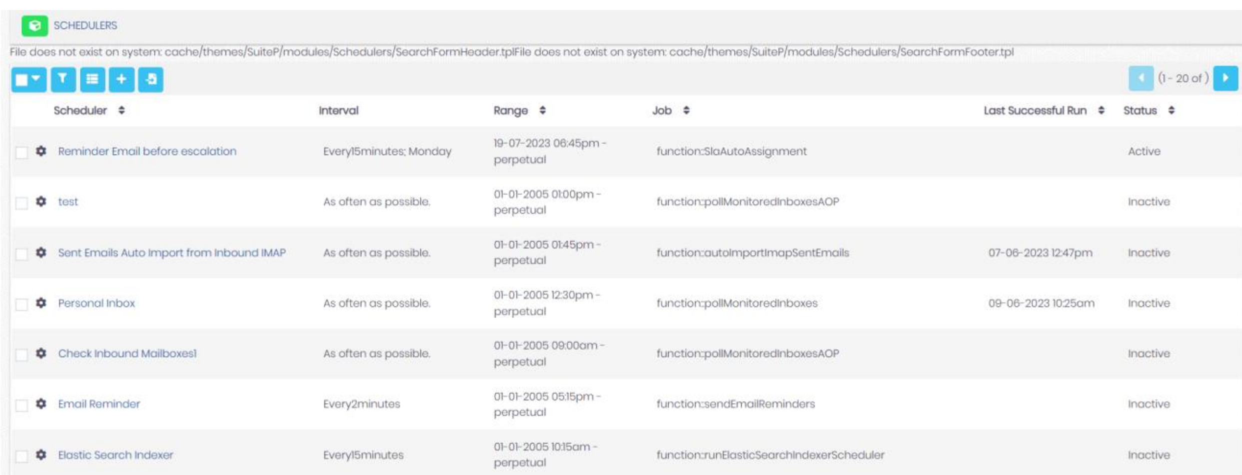
5.15. Themes

You can set the default theme and which other themes are available for users to select here.



5.16. Scheduler

SimpleCRM uses a number of Scheduler jobs running at scheduled times, supporting functionality such as search indexing, workflows, email notifications, database maintenance and sending campaign emails.



Scheduler	Interval	Range	Job	Last Successful Run	Status
Reminder Email before escalation	Every15minutes; Monday	19-07-2023 06:45pm - perpetual	function::SlaAutoAssignment		Active
test	As often as possible.	01-01-2005 01:00pm - perpetual	function::pollMonitoredInboxesAOP		Inactive
Sent Emails Auto Import from Inbound IMAP	As often as possible.	01-01-2005 01:45pm - perpetual	function::autoImportImapSentEmails	07-06-2023 12:47pm	Inactive
Personal Inbox	As often as possible.	01-01-2005 12:30pm - perpetual	function::pollMonitoredInboxes	09-06-2023 10:25am	Inactive
Check Inbound Mailboxes1	As often as possible.	01-01-2005 09:00am - perpetual	function::pollMonitoredInboxesAOP		Inactive
Email Reminder	Every2minutes	01-01-2005 05:15pm - perpetual	function::sendEmailReminders		Inactive
Elastic Search Indexer	Every15minutes	01-01-2005 10:15am - perpetual	function::runElasticSearchIndexerScheduler		Inactive

5.16.1. Setting up the Scheduler

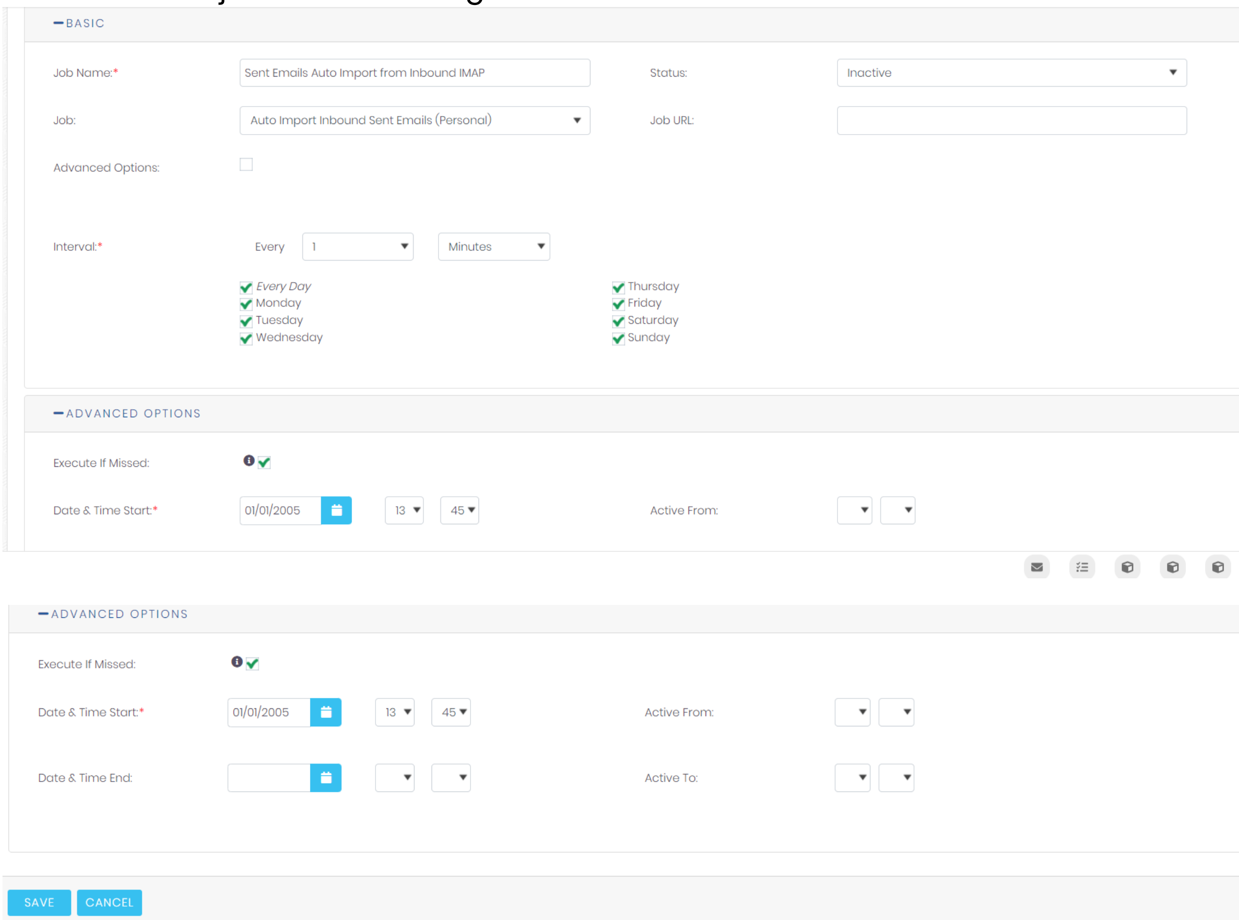
Scheduler jobs need to be manually enabled. This is done by running a script called cron.php every minute. This, in turn, manages all SimpleCRM jobs according to their proper schedules.

In Windows this is setup using Task Scheduler, and in Linux and iOS, it is setup in crontab. Detailed instructions for your system will be displayed during installation and can also be found on the Schedulers page, under the list of scheduled jobs.

See Scheduler Jobs in SimpleCRM in Linux - the Definitive Guide for an in-depth guide to setting up and managing scheduled jobs in Linux.

5.16.2. Configuring Scheduled Jobs

Click on a scheduled job to view settings

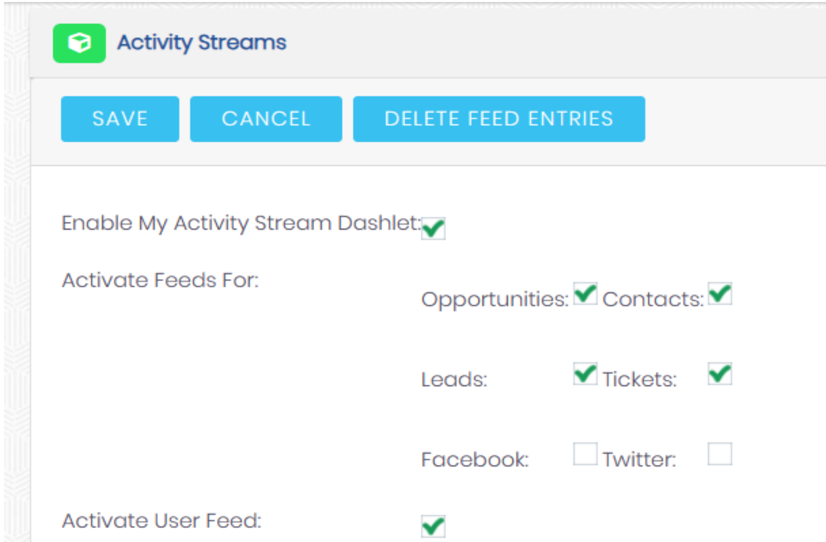


In edit mode, you can set the job status (only Active jobs will run) and configure the interval at which the job runs as well as the start time. Unchecking the 'Advanced Options' box will show a more user-friendly way to set the job interval if you are not familiar with the crontab notation. Re-checking Advanced Options will let you set the initial start time.

5.16.3. Activity Streams

By default the Activity Stream dashlet displays recent updates for the Opportunities, Contacts, Leads and Cases modules.

The Activity Stream admin panel allows you to configure what is displayed on the activity feed and which features are available to users.



Enable MyActivity Stream Dashlet: Enables/disables the Activity Stream dashlet for all users

Activate Feeds For: Select the modules to display activity for

Activate User Feed: Allows users to enter messages in the status update field for broadcast to all users

5.17. Email Settings

5.17.1. Mail Accounts Overview

Configuring email for SimpleCRM provides a wide range of features, including sending personal emails to contacts, automatic creation of cases, sending notifications for events using workflows and sending email marketing campaigns.

This document explains the different types of mail accounts and how to set them up. For information on reading and sending email in SimpleCRM using the Emails module, see the Emails module guide.

Several different types of account can be configured within SimpleCRM for different purposes. These are:

5.17.2. Outbound Mail

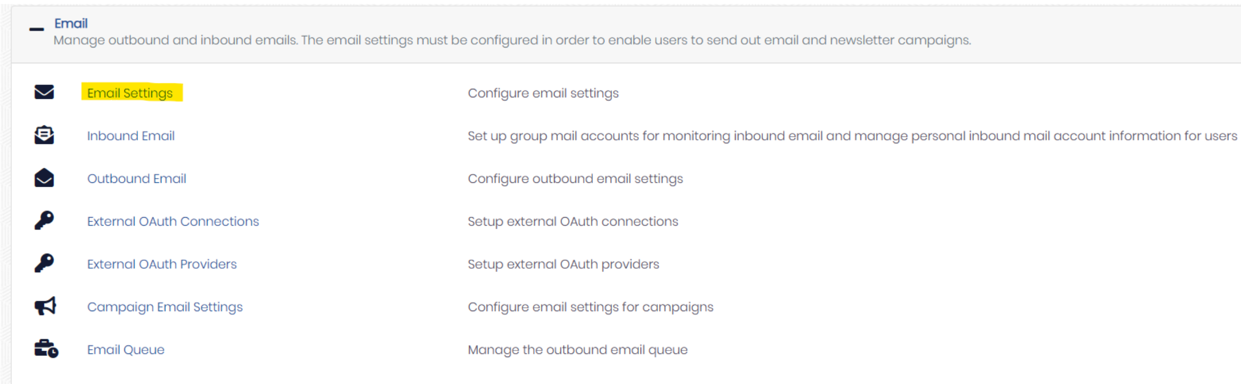
The outbound mail server is used to send automatic email notifications (such as record assignment notifications) and emails sent as workflows actions.

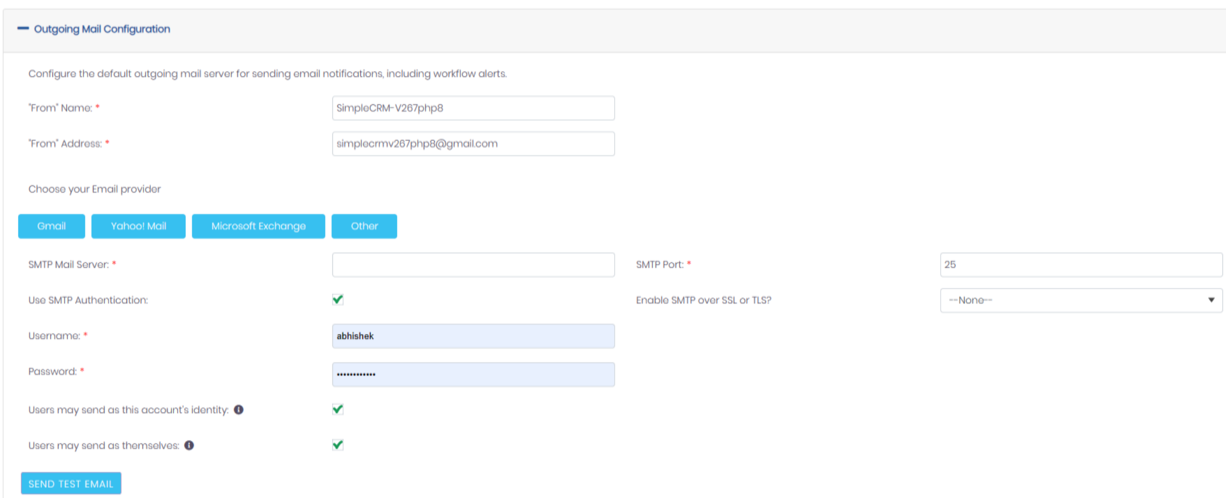
The outgoing mail configuration will need to be set up by an Administrator.

See Outgoing Mail Configuration for instructions on setting up the default outgoing mail configuration.

Other outbound accounts can be configured in addition to the default account for specific purposes, such as sending Campaigns. These can be set up from the Admin panel, under outbound accounts. If no other outbound accounts are configured, the default outgoing mail server account will be used.

The outgoing mail configuration settings are used to send system notification emails such as password reset emails, record assignment notifications and workflow email notifications.



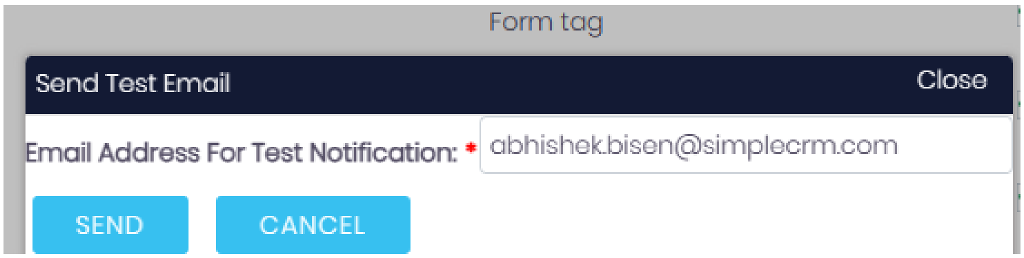


Select the mail provider by clicking the appropriate button and then enter the required configuration information for your system. Verify that any default port/protocol settings are valid for your setup.

Allow users to use this account for outgoing mail - When this option selected, all users will be able to send emails using this outgoing mail account, which is the same as that used to send system notifications and alerts. If the option is not selected, users can still use the outgoing mail server after providing their own account information.

Users may send as themselves - When this option selected, all users will be able to send emails using the same outgoing mail account used to send system notifications and alerts. If the option is not selected, users can still use the outgoing mail server after providing their own account information.

Click **SEND TEST EMAIL** to check your settings. You will be asked to enter an email address for the test message to be sent to.



A verification message will be displayed if the email was sent successfully. Check that you have received this test message.

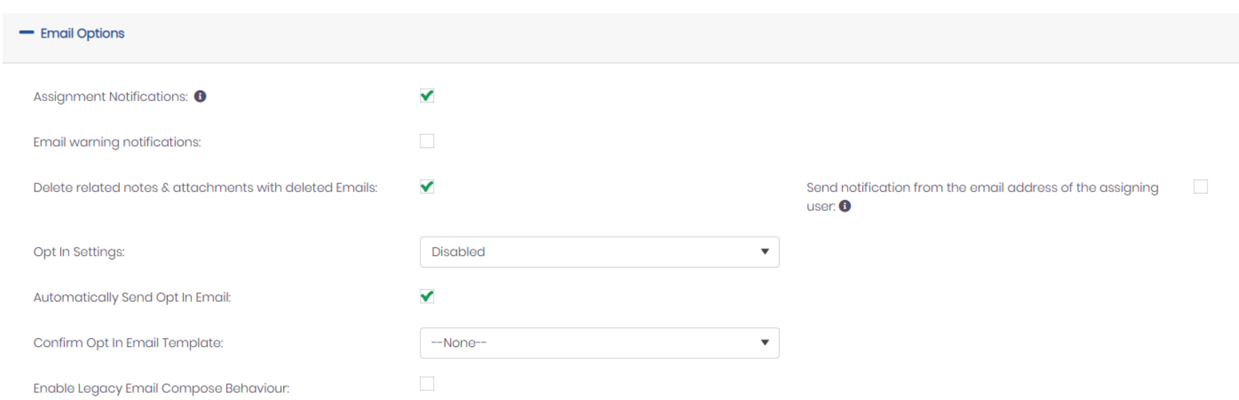
Once the settings have been verified, click **SAVE** so that these settings are retained before leaving the settings page.

5.17.3. Troubleshooting

If the test message was not sent successfully, check the log file in system settings for any further error messages which may assist with resolving the issue.

Verify that all port/protocol settings are correct and that the username/password entered is correct and has the correct permissions to send mail.

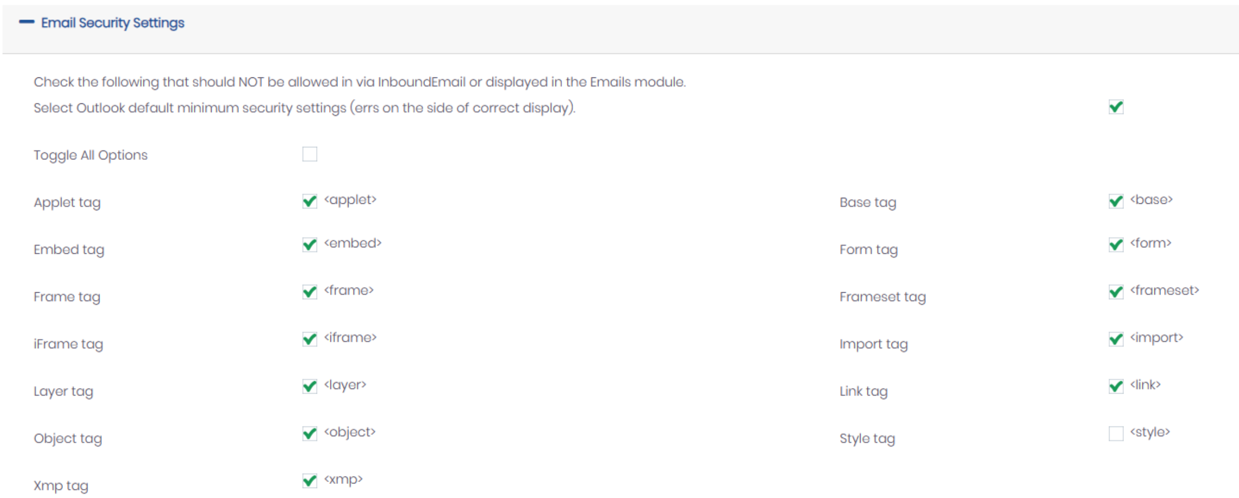
5.18. Email Option



Assignment Notifications - When selected, users will be emailed when a record is assigned to them.

Send notification from the email address of the assigning user - When enabled, the assigning user's name and email address will be included in the From field of the email. This feature might not work with SMTP servers that do not allow sending from a different email account than the server account.

5.18.1. Email Security Settings



Email Security Settings - Tags selected here will be stripped from inbound email and will not be displayed in the Emails module.

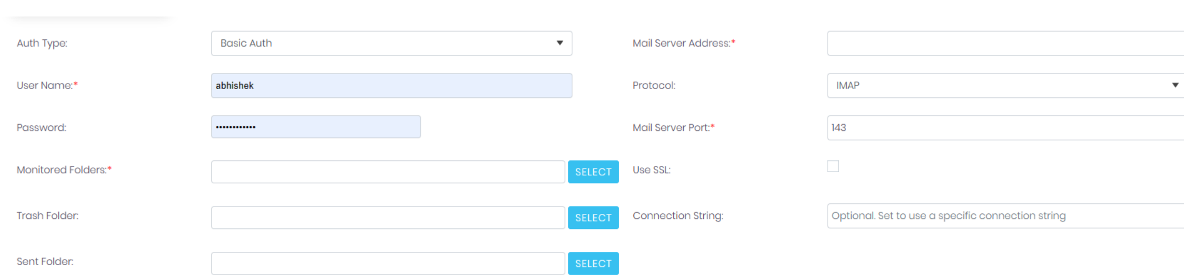
Click **SAVE** to retain your settings.

5.18.2. Personal Email Account

A personal email account is an internal or external email account used to view and send personal emails from the Emails Module.

5.18.3. Group Email Account

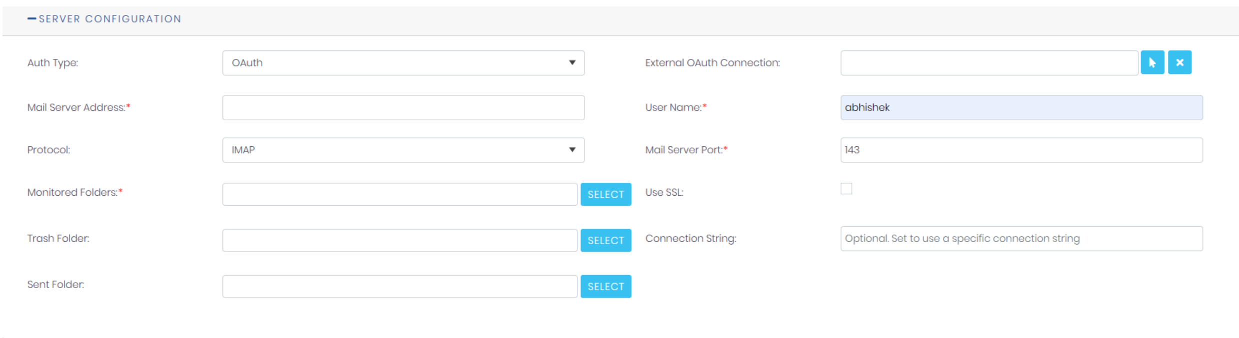
A group email account allows more than one user to access a particular mail account. This can be useful for sales or support email accounts for example. In addition, group accounts are also used for sending email campaigns. See the Campaigns documentation for more information.
SimpleCRM can also be configured to automatically import emails and to automatically create cases from email.



When setting up with Basic Auth all you will need is the username(email) and password of the account you are adding as well as the mail server address.

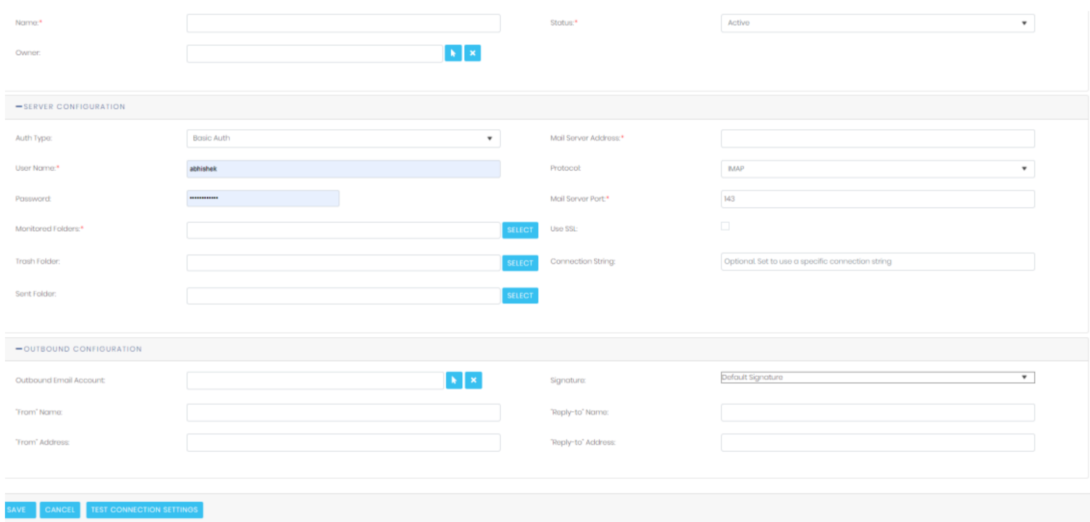
Monitored Folders are the folders which are checked for new (unread) mail. Inbox and Trash folder names must be specified here. Click SELECT to connect to the mail server and select the relevant folder(s) from the popup dialog.

5.18.4. Oauth Configuration



When setting up with OAuth, you will need the username(email), password and mail server address for the account.

5.18.5. Email Handling Option



5.18.6. Import Emails Automatically

Check this box to import emails automatically, which means that records will be created in SimpleCRM for all incoming emails. These associated emails can then be viewed via the History subpanel of the relevant record. This setting is selected by default in SimpleCRM.

5.18.7. Outbound Configuration

From Address: Used as the from address where supported, otherwise the system outbound account will be used.

Allow users to send emails using the From name and Address as the reply to address: When checked, the From Name and From Address for this account will appear as a From option when composing an email for all users that have access to this group account.

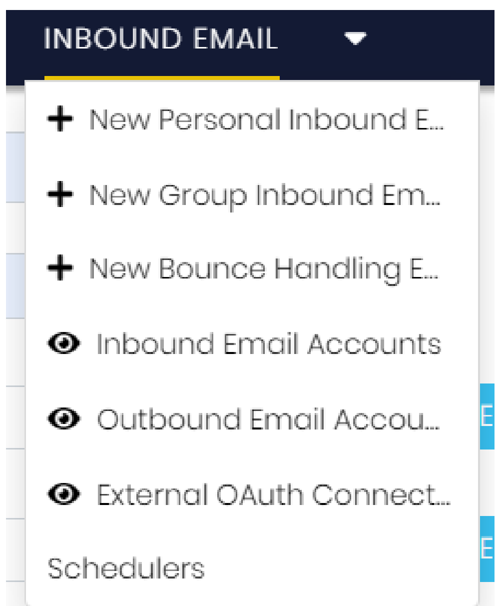
Once configured, all inbound accounts are listed under Inbound Accounts on the Admin panel, from where they can be edited or removed.

5.18.8. Bounce Handling Account

A Bounce Handling Account is used to manage bounce notifications for an email campaign. Bounced email addresses are recorded in the campaign status.

Once created, the bounce handling account can be selected by users when setting up a campaign.

Select New Bounce Handling Account from the Sidebar.



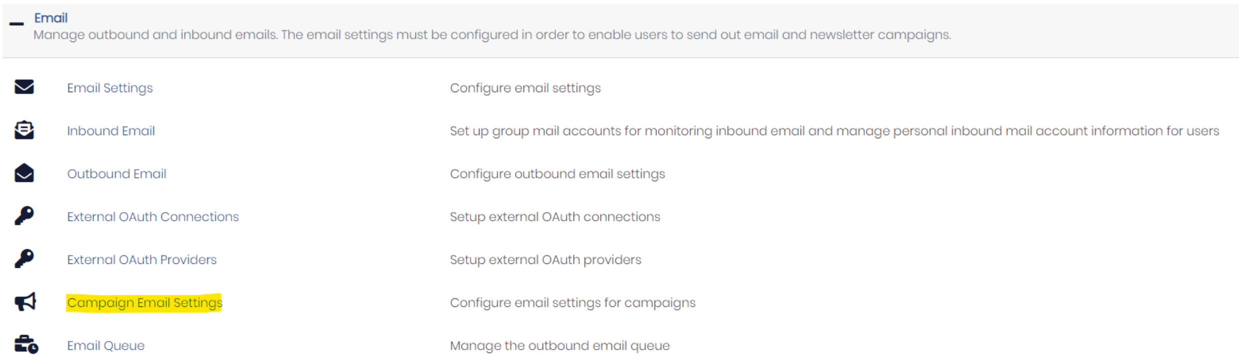
Enter the configuration details for the bounce account you are configuring. You will need the username and password for the account, plus the mail server address. Your system administrator will be able to supply these settings.

5.18.9. Campaign Email Settings

The batch size for sending campaign emails

Where campaign tracking files are located

Whether or not copies of campaign messages are kept



5.18.10. Email Queue

Scheduled campaign emails are queued here until the scheduled job runs to send them out. By default this is the Run Nightly Mass Email Campaigns scheduled job.

See the Scheduler section for further information on scheduled jobs.

Click **SEND QUEUED CAMPAIGN EMAILS** to send them immediately without waiting for the scheduler to do so.

5.19. Field Configurator

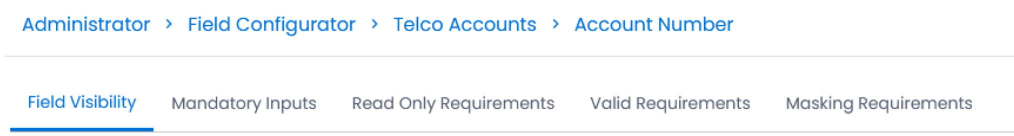
The following instructions for creating, configuring, and managing field configurations using SimpleCRM's Field Configurator. The Field Configurator allows you to customize field behaviors based on various conditions, without the need for coding.

Before proceeding with the Field Configurator, ensure you have the following:

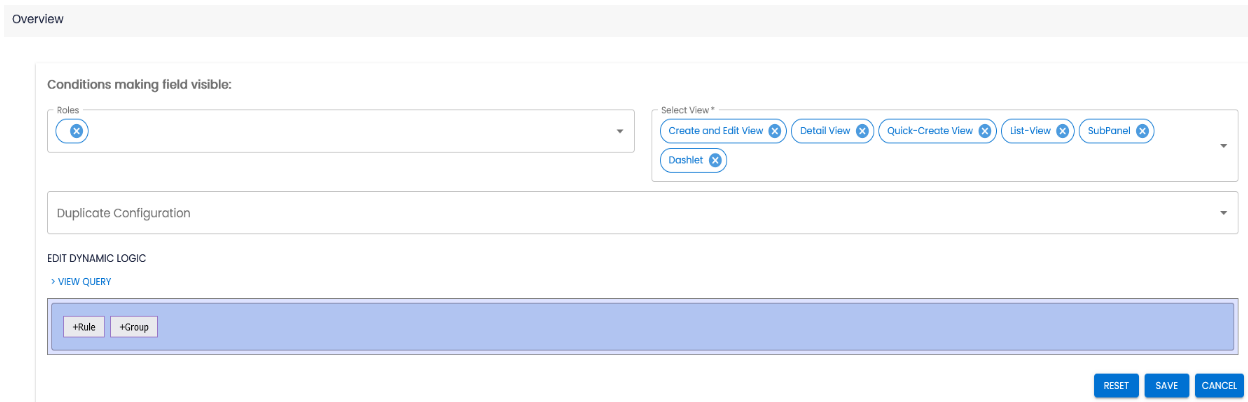
- Administrative access to the CRM system.
- Familiarity with the Administrator Panel in the CRM system.

5.19.1. Basics of Field Configurator

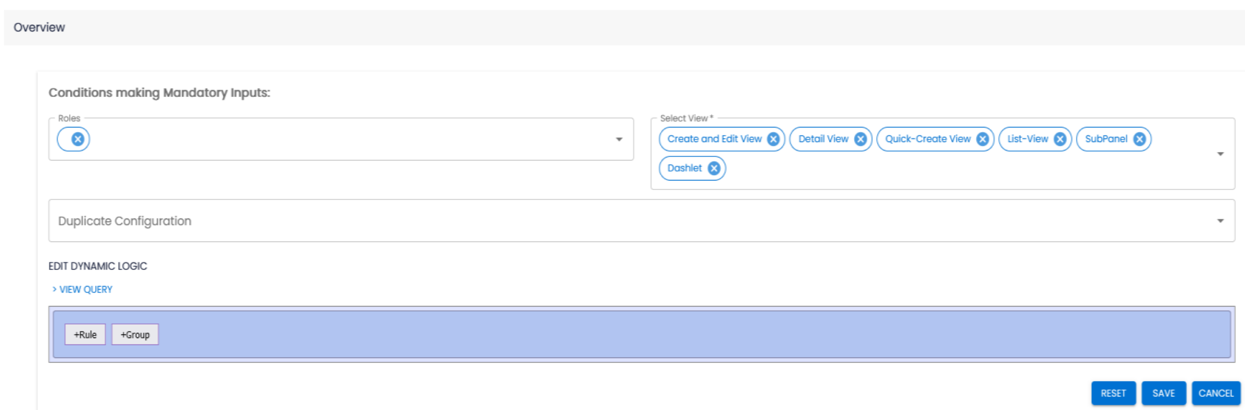
The Field Configurator provides tools to configure field-level settings for various modules based on different conditions. It consists of the following sub-panels:



1. **Field Visibility**: This sub-panel allows you to choose which fields of the selected module are visible to specific roles and views.

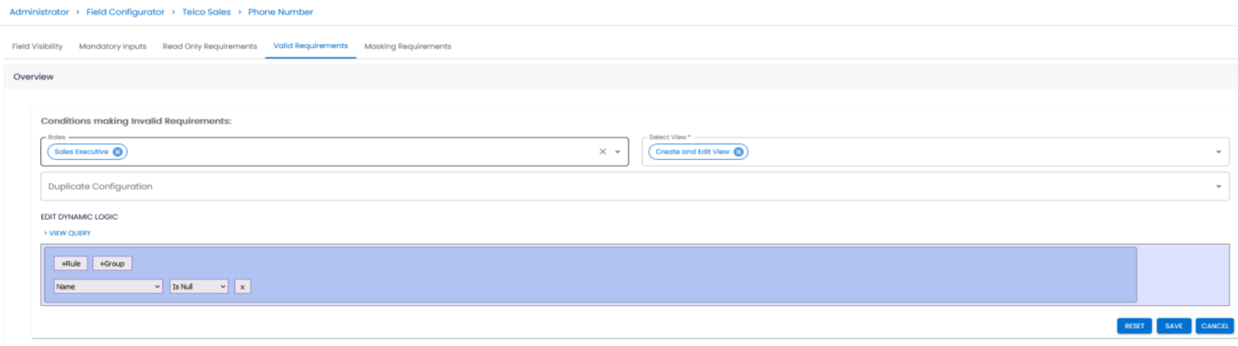


2. **Mandatory Inputs**: This sub-panel lets you determine whether a selected field needs to be mandatory for specific roles and in which views the field should appear.

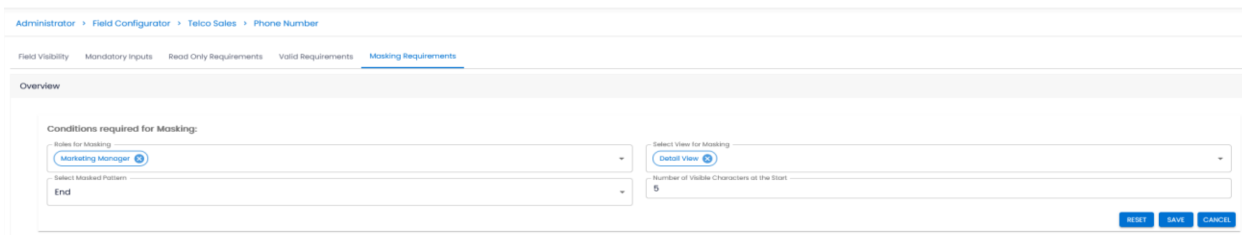


3. **Read Only Requirements**: This sub-panel allows you to define whether a selected field should remain in a Read-Only state after being saved and if it meets the specified conditions.

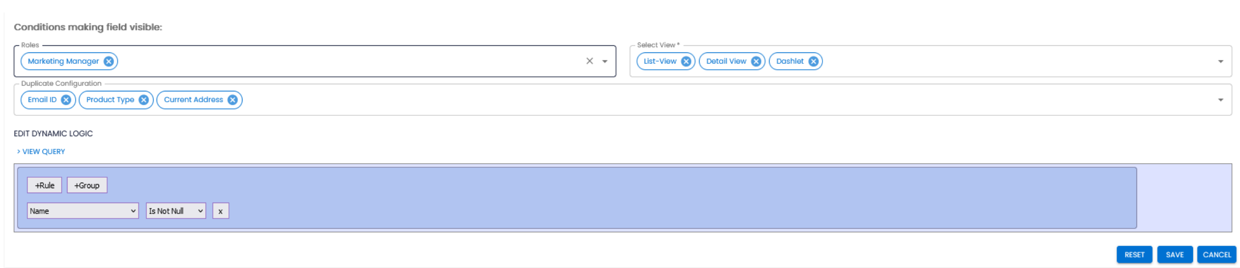
4. **Valid Requirements**: This sub-panel enables you to define conditions under which a selected field will be considered invalid for specific roles and views.



5. **Masking Requirements**: This sub-panel allows you to specify which characters in a selected field should be visible to specific roles and views.

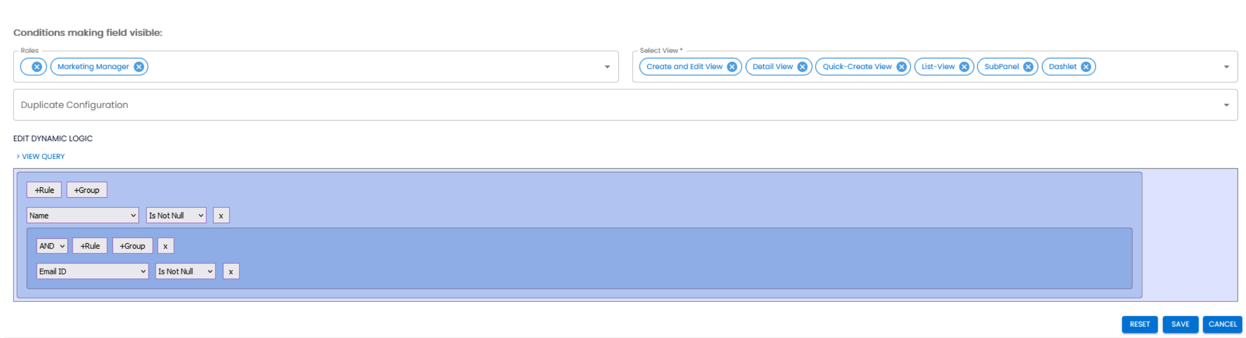


- **Dynamic Logic**: This section displays and allows you to add or edit conditions to achieve your desired field configurations. You can add rules and groups to create complex condition logic.
- **+Rule**: This option allows you to add a condition by selecting a field from the dropdown menu, choosing an operator, and entering a value in the text field.

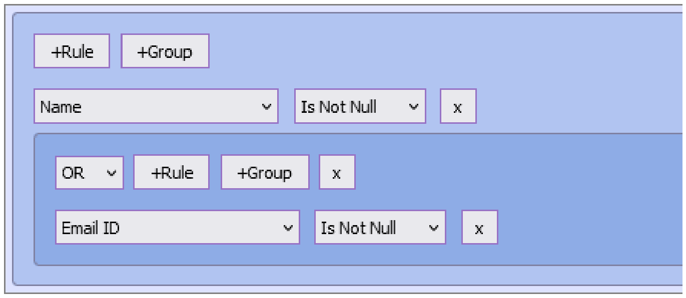


- **+Group**: This option enables you to group multiple rules together using a combinator (AND, OR, NOT).

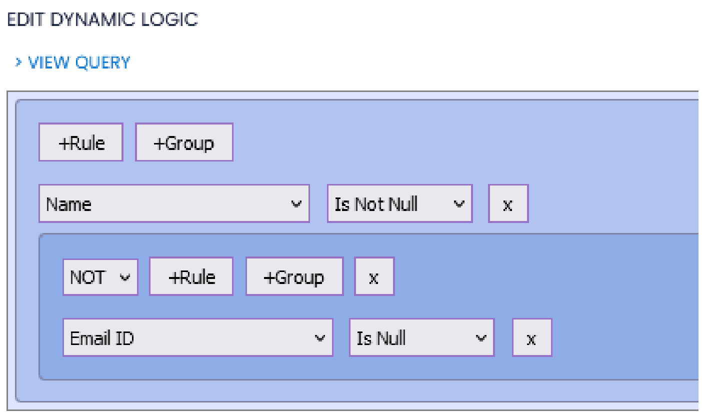
AND Logic: This is the default option and will proceed only when all the parameters within the group are met.



○ **OR** Logic: This option will proceed if any of the parameters within the group are met.



- **NOT** Logic: This option will proceed if the parameter within the group is not met.

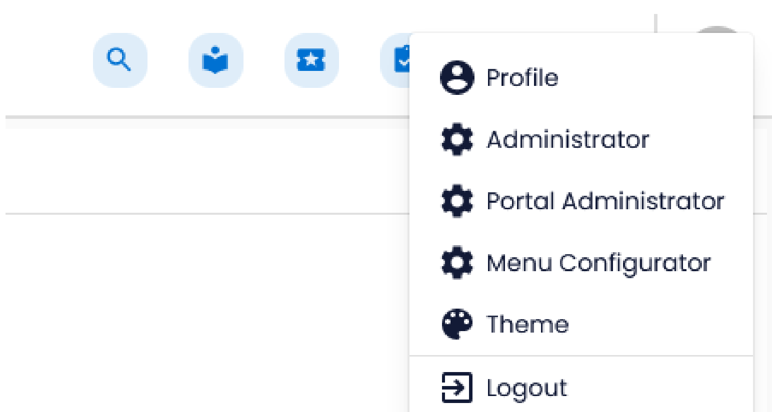


5.19.2. Configuration Steps

Follow these steps to create, configure, and manage field configurations using the Field Configurator:

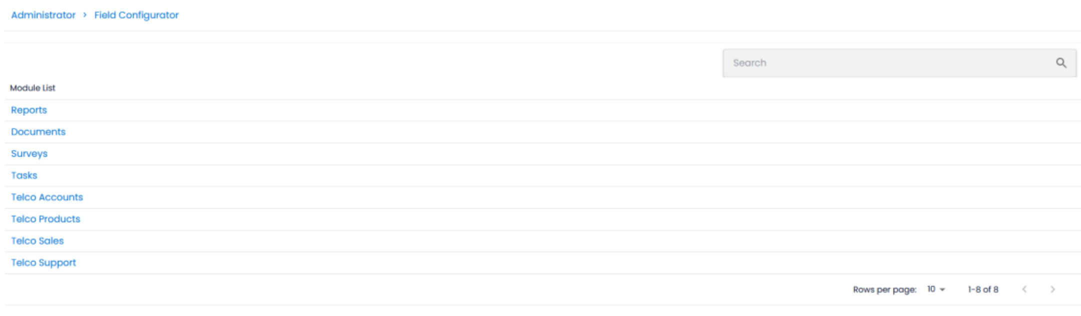
1. Access the CRM System: Log in to the CRM system using your credentials to gain administrative access.
2. Navigate to the Portal Administrator Panel: Locate and select the Portal Administrator Panel option from

the CRM system's interface.



1. Select the Field Configurator Option: Within the Administrator Panel, locate and select the Field Configurator option to access the Field Configurator tool.

2. Choose the Module: From the available options, select the module for which you want to configure field settings.



3. Select the Field: Once the module is selected, choose the specific field you want to edit from the provided field list.

4. Configure the Field: Choose the desired sub-panel (e.g., Field Visibility, Mandatory Inputs, Valid Requirements, Masking Requirements) and configure the selected field accordingly.

5. Save the Configuration: After making the necessary changes, save the field configuration. Review and make any additional modifications if needed.

6. Use Cases

6.1. Field Visibility

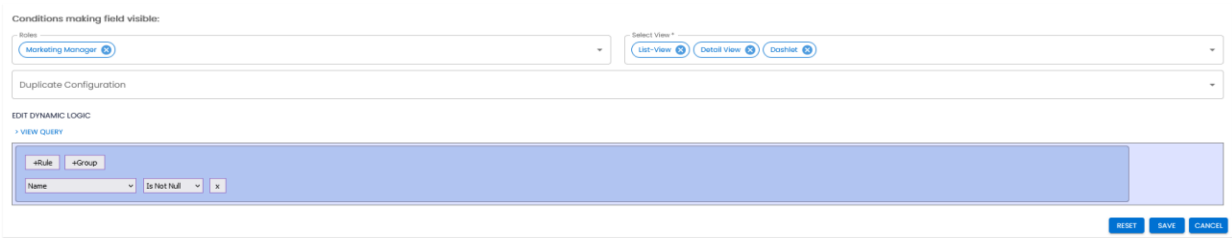
- ### Use Case 1

Scenario: The Phone Number field should only be visible when the Name field is not NULL for the Marketing Manager

role in the List, Detail, and Dashlet Views.

Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.
4. Select List, Detail, and Dashlet Views.
5. Configure the Dynamic Logic to meet the specified condition.
6. Save the configuration.



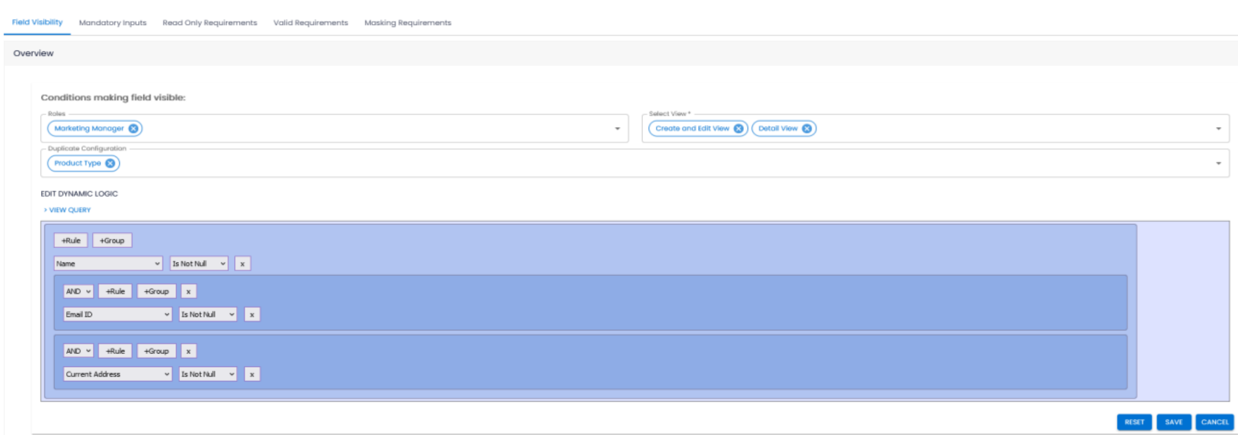
- ## Use Case 2

Scenario: The Phone Number field should be visible when the Name, Email ID, and Current Address fields are not NULL

for the Marketing Manager role in the List view. Duplicate the same configuration for the Product Type field.

Steps

1. Access the Field Configurator.
2. Select the Module
3. Choose the Role.
4. Select List View.
5. Configure the Dynamic Logic to meet the specified condition.
6. Save the configuration.



6.2. Mandatory Inputs

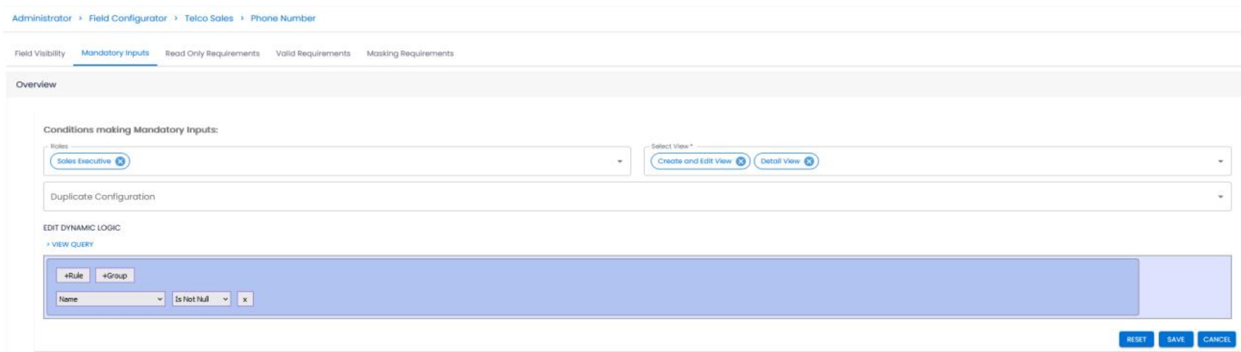
- ## Use Case 1

Scenario: The Phone Number field should be mandatory when the Name field is not NULL for the Sales Executive role

in the Create and Edit views, as well as the Detail View.

Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.
4. Select Create and Edit views and the Detail View.
5. Configure the Dynamic Logic to meet the specified condition.
6. Save the configuration.



- ## Use Case 2

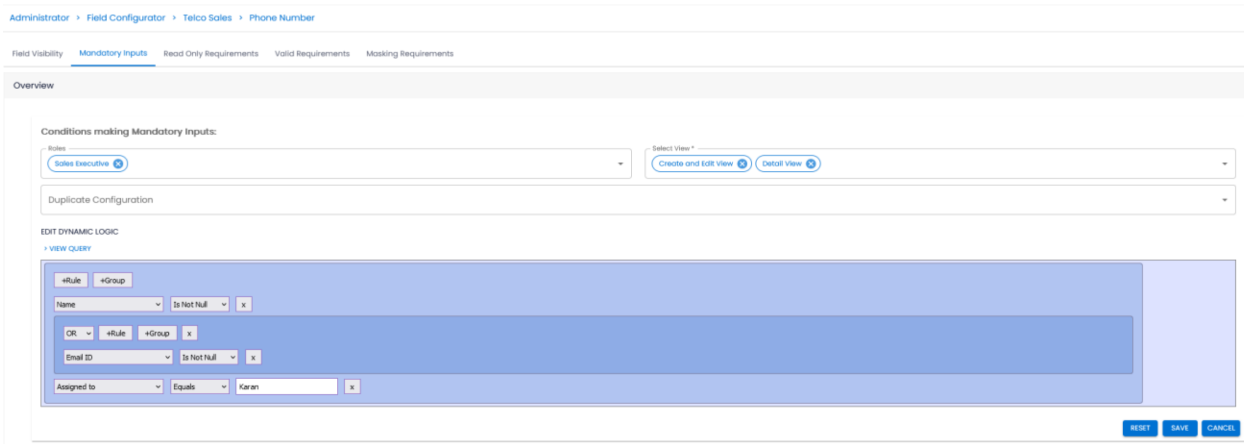
Scenario: The Phone Number field should be mandatory when the Name field is not NULL or the Email field is notNULL,

and the Assigned to Field is equal to "Karan" for the Sales Executive role in the Create and Edit views, as well as the

Detail View. Apply the same configuration for the Product Type field.

Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.
4. Select Create and Edit views and the Detail View.
5. Configure the Dynamic Logic to meet the specified conditions.
6. Save the configuration.



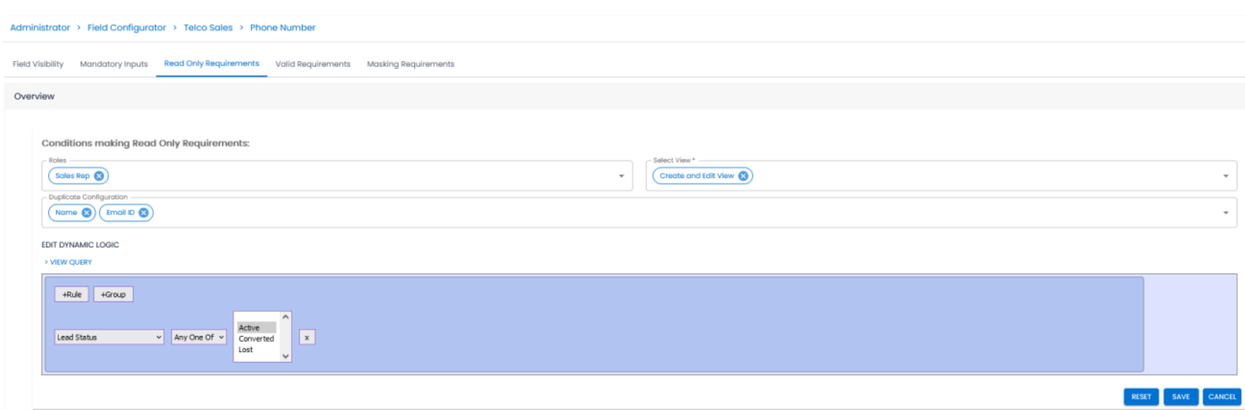
6.3. Read Only Requirements

- **Use Case 1**

Scenario: The Phone Number field should be set as Read-Only when the Lead status field is Active for the Sales Rep role in the Create and Edit view. The same Read-Only configuration should be applied to the Name and Email ID fields.

Steps

1. Access the Field Configurator option.
2. Select the Module.
3. Choose the Role from the Roles Dropdown.
4. Select the Create and Edit view from the Select View Dropdown.
5. Choose the Name and Email ID fields in the duplicate configuration option.
6. Add the Dynamic Logic to meet the specified criteria as shown below.
7. Save the configuration.

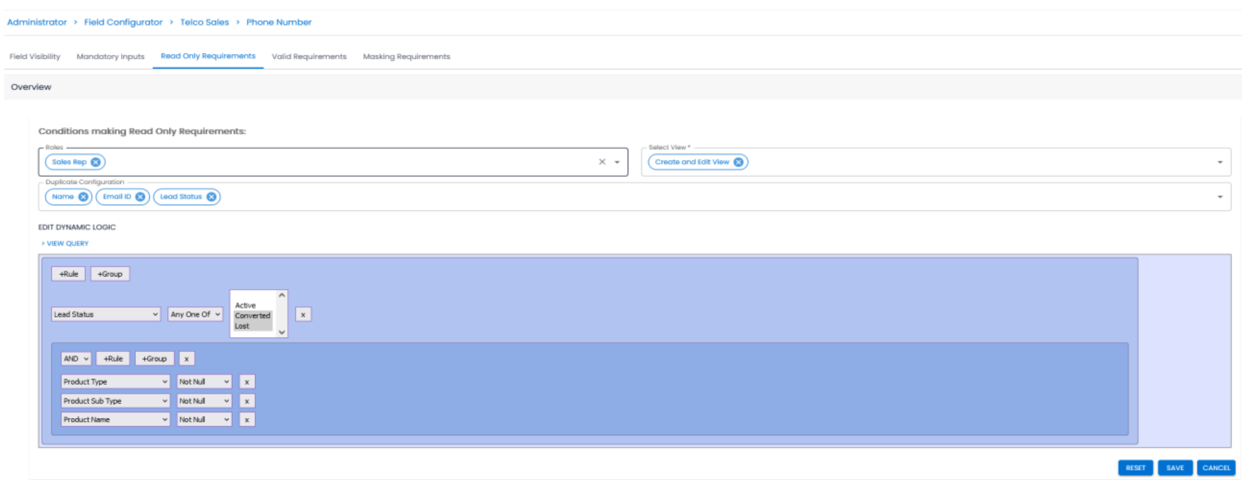


- **Use Case 2**

Scenario: The Phone Number field should be set as Read-Only when the Lead status field is either Converted or Lost, and the Product type, Product Subtype, and Product Name fields are not Null for the Sales Rep role in the Create and Edit view. The same Read-Only configuration should be applied to the Name, Email ID, and Lead Status fields.

Steps

1. Access the Field Configurator option.
2. Select the Module.
3. Choose the Role from the Roles Dropdown.
4. Select the Create and Edit view from the Select View Dropdown.
5. Choose the Name, Email ID, and Lead Status fields in the duplicate configuration option.
6. Add the Dynamic Logic to meet the specified criteria as shown below.
7. Save the configuration.



6.4. Valid Requirements

- **Use Case 1**

Scenario: The Phone Number field should be marked as invalid if the Name field is NULL in the Create and Edit views for the Sales Executive role.

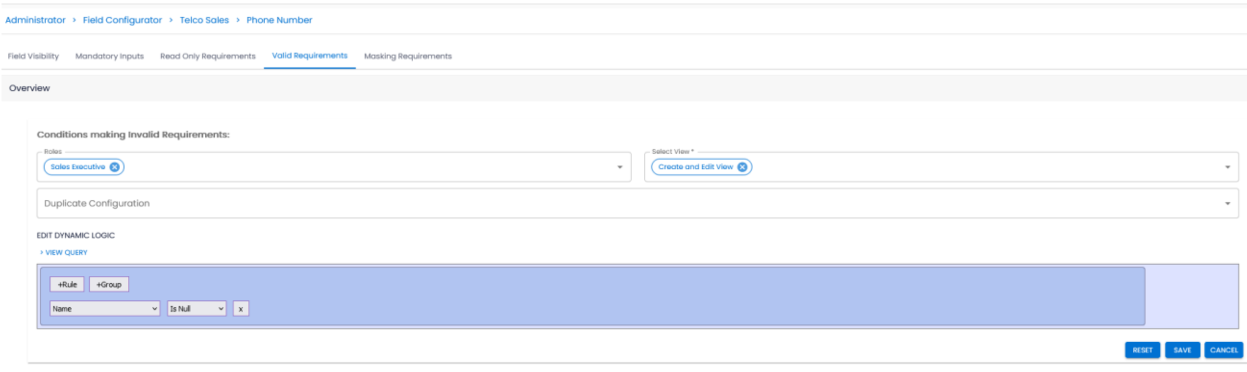
Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.

4. Select Create and Edit views.

5. Configure the Dynamic Logic to meet the specified condition.

6. Save the configuration.



- **Use Case 2**

Scenario: The Phone Number field should be marked as invalid if the Name, Email ID, and Date of Birth fields

are NULL in the Create and Edit views for the Sales Executive role. Apply the same configuration for the

Current Address field.

Steps

1. Access the Field Configurator.

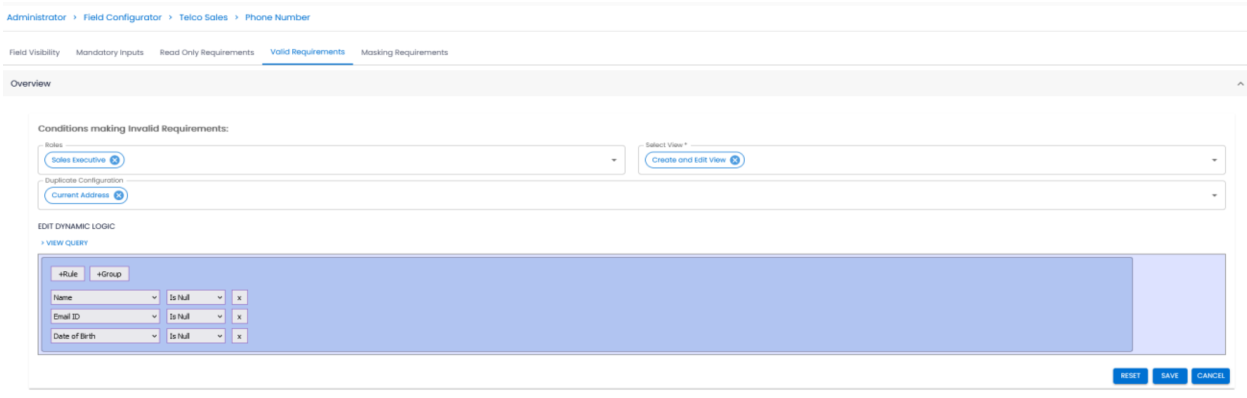
2. Select the Module.

3. Choose the Role.

4. Select Create and Edit Views.

5. Configure the Dynamic Logic to meet the specified conditions.

6. Save the configuration.



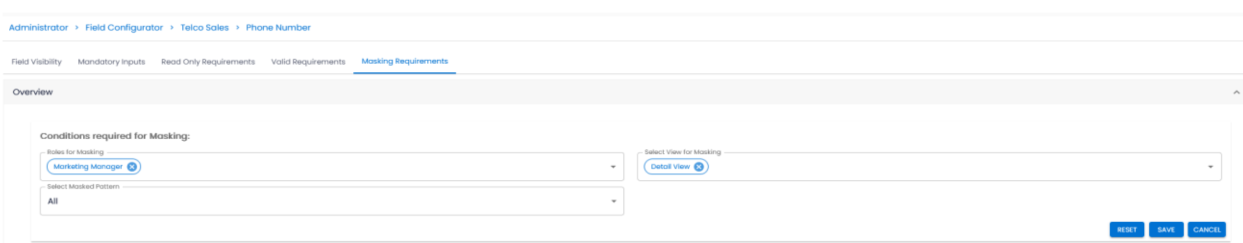
6.5. Masking Requirements

- **Use Case 1**

Scenario: The Phone Number field should be completely masked for the Marketing Manager role in the Detail view.

Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.
4. Select the Detail view.
5. Select the "All" option in the Select Masked Pattern.
6. Save the configuration.



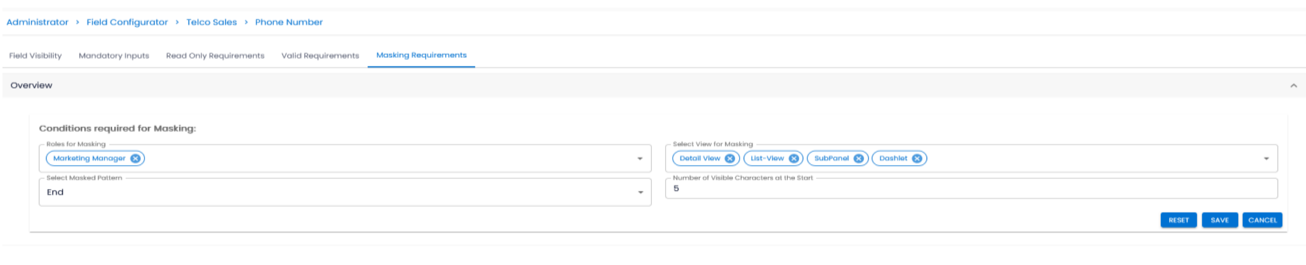
- **Use Case 2**

Scenario: The Phone Number field should only show the first 5 characters for the Marketing Manager role

in all available views.

Steps

1. Access the Field Configurator.
2. Select the Module.
3. Choose the Role.
4. Select all available views.
5. Select the "End" option in the Select Masked Pattern.
6. Enter "5" in the Number of Visible Characters at the Start option.
7. Save the configuration.



By following these steps and use cases, you can effectively create, configure, and manage field configurations

using SimpleCRM's Field Configurator.

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