3.4.2

# CRM-CTT NON-TECHNICAL SYSTEM MANAGEMENT & CONFIGURATION ESSENTIALS



http://www.crm-ctt.com

VERSION: 0.45

STATUS: PARTLY DONE

MARCH 19, 2006

BASED ON CRM-CTT VERSION 3.4.2

# PREFACE

Since even the Linux Journal wrote an article about CRM-CTT, it becomes even more challenging to keep everybody happy with it. Over the last two years I've received many thousands reactions, feature requests, and bug reports. Some questions considered functionality buried so deep down in the "basement" that I too had to check what it was and how it worked again. Very nice to see that people are really using the product to the maximum of its extend. One reaction I remember very well was about the customer overview page: "I've imported around 5000 customers into CRM-CTT and the customers page becomes a little hard to work with. Can you improve this?". When I designed CRM-CTT, and we first started to use it, we had around 25 customers registered in it. :)

Regards,

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### DONATIONS

If you, or even better, your company, is using CRM-CTT and is enjoying it, please consider donating. As far as we can see, businesses all over the world (records from Western Europe, Eastern Europe, USA, Asia, South America, Africa, Russia and Australia) are now using CRM-CTT to organize their day-to-day business, and a little motivation now and then would be nice. So, admins: try and convince your boss to donate a little and point him/her to the CRM-CTT donation page at: https://sourceforge.net/project/project_donations.php?group_id=61096

### COMMERCIAL SUPPORT

Commercial support for CRM-CTT is available, though not through me. Several companies are offering support, of which I recommend ES Automatisering in The Netherlands, to be reached via their website at http://www.esautomatisering.com

On the project site (http://www.crm-ctt.com) you'll find a page dedicated to commercial support.

This document gives some little hints for non-technical CRM-CTT system administrators on how to perform basic administrative tasks.

This document assumes somebody else set up an CRM-CTT installation for you which already works. For more (technical) details please refer to the Administration Manual (to be reached by pressing ALT-M when logged into CRM-CTT).

Table of contents:



*Before you start: please be aware of the fact that this tutorial covers only few of the many administrative tasks <u>needed</u> to perform when maintaining a CRM-CTT installation. CRM-CTT also has lots of functions which are self-explanatory – these functions are mostly not in this tutorial nor in the administration manual..*

# ADDING AND MODIFYING USERS

Shortcut: ALT-U.

Navigation: Main → Administration → Users & profiles

To add a new user, enter the details in the upper form:

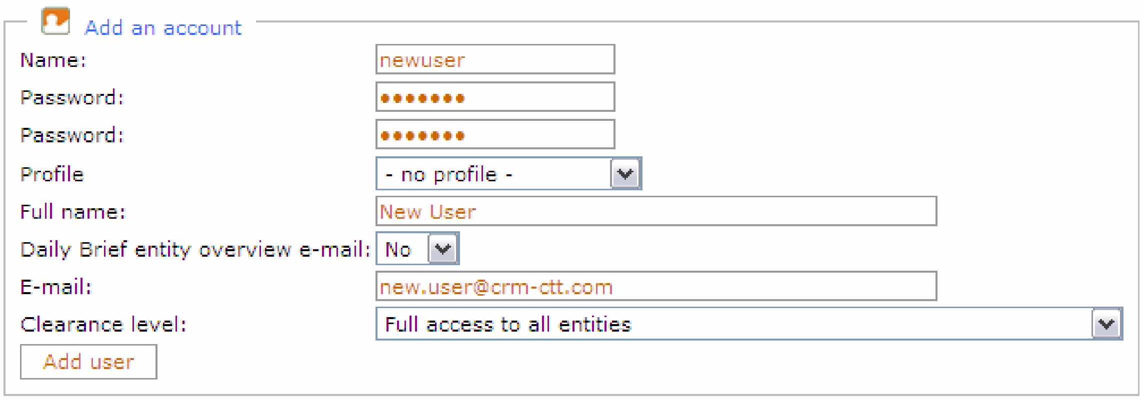


*Fig. 1.1 : Adding a new user*

After that, click “Add user”. The screen reloads and you see the following:

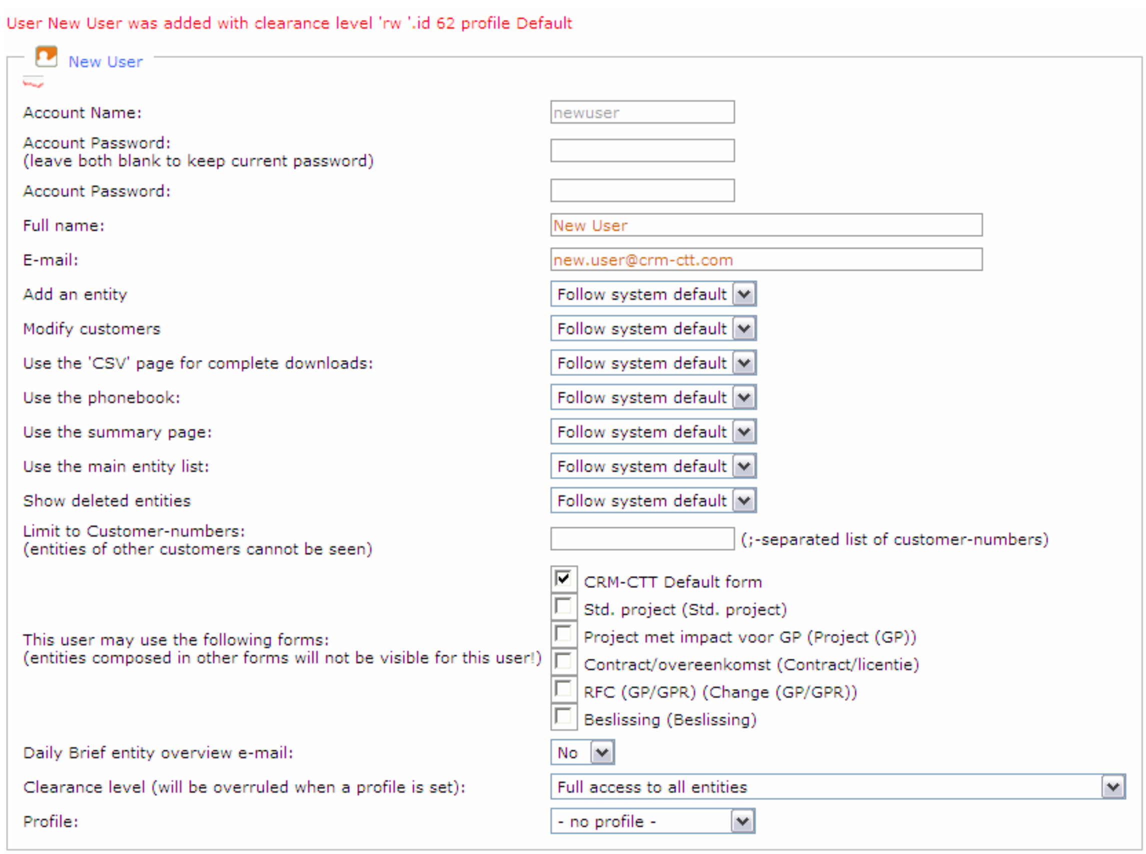


*Fig. 1.2 : After a new user form  is saved, details can be set*

Now you can set all the details. You can determine everything a user can do. Since the page is self-explanatory, this tutorial will not go into detail further.

# CREATE A NEW FIELD

Shortcut: ALT-E.

Navigation: Main → Administration → Extra fields

Before creating a new field, ask yourself if you want to add an entity field (to store data in an entity/ticket) or a customer field (to store data about customers). When you know which field you want, either click “New entity field” or “New customer field”:

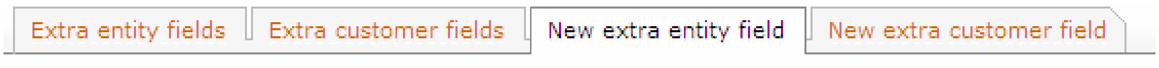


*Fig. 2.1 : Creating a new extra field*

Next, determine the type of extra field you want to create. You can choose from the following types (some more complex types are left out of this list):

- Single-line text box
- Multi-line text box (text area, a box)
- Drop-down box
- Drop-down box based on customer extra field of type “List of values”
- E-mail field (a field for storing an e-mail address)
- An internet-link (a field for storing a hyperlink)
- Date field (will spawn the calendar popup select window)
- A numeric field (will be validated when the form is saved)
- A drop-down list of CRM-CTT users (mainly for use in combination with triggers)
- A “List of values” – this field is just like a textbox, only this time not one, but multiple, preceded by the number. This can come in handy when registering multiple phone numbers, for instance.
- A button which does something based on triggers (in other words; after creating a button, you need to set triggers on the button (section triggers -> misc. triggers)

After saving your nice new fields, you can set the detailed access restrictions if your like. With this option, you can set access rights per user or group for this field so you can exactly control who has access to it, and who doesn’t:

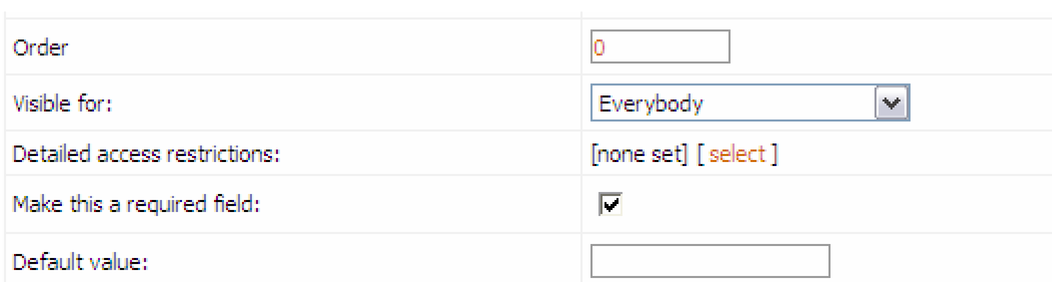


*Fig. 2.2 : After a new field is saved, detailed access restrictions can be set*

When you click [select], the following screen will pop-up:

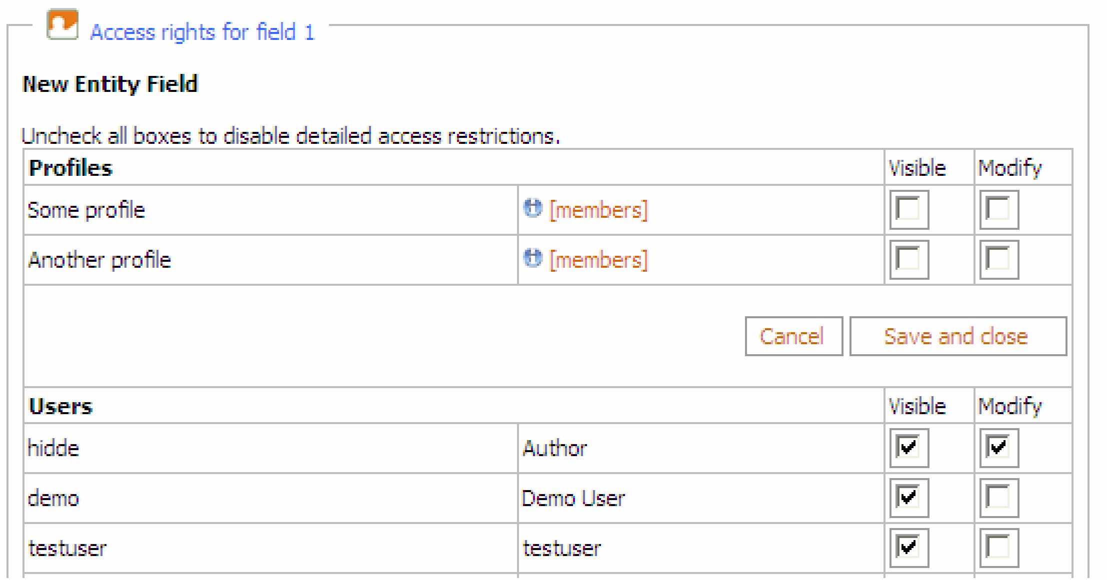


*Fig. 2.3 : Setting detailed access restrictions for an extra field*

In this form you can define who can see the field, and who can edit it. Those who can see nor edit it, will see a lock on the place in the form where the field should be displayed.

# PLACING A FIELD IN AN HTML-TEMPLATE

Shortcut: ALT-A (administration)

Navigation: Main → Administration → Templates

Note: This is only for installation running on custom made HTML-forms. The default edit-entity form will automatically display the extra field. The use of the default form however is deprecated.

After creating a new field, it's not yet ready for use; you must first make sure it's visible somewhere. As your installation might use multiple edit-entity forms, you must first know exactly which forms to edit. Check the list, and look for "HTML Entity form" as document type:

| | | |
|---|---|---|
| 6291 | Std. project | HTML Entity form |
| 6292 | Project met impact voor GP | HTML Entity form |

*Fig.3.1 : Identify a template which contains an HTML-form*

You probably want your new field to appear on both your forms, but if not, just edit only the one you want the field to appear in. Click [edit] at the end of the row to start the rich text editor to edit the form:

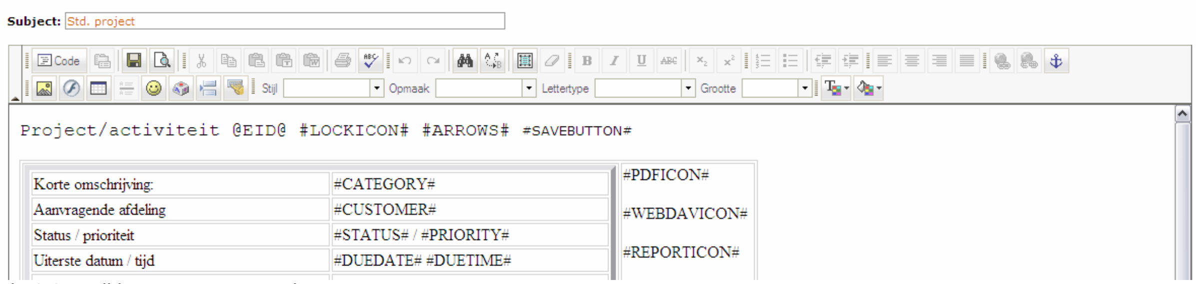


*Fig.3.2 : Editing an HTML template*

When you scroll down, you'll see a legend. In this legend you can find all tags for all extra fields:

| Extra data fields: | |
|---|---|
| Example extra entity field | #EFID1# |

*Fig.3.3 : Adding an extra field as form tag*

The tags enclosed in #'s are form tags. When you click the tag name, it will be copied to your clipboard. Now find a place on the form where you'd like this field to be displayed, and paste the value there. **Be careful: as soon as you save the form, changes will be applied immediately.**

# SETTING PRIORITY AND STATUS VALUES

Shortcut: ALT-A (administration)

Navigation: Main → Administration → Main → Edit status and priority values

The status and priority values page looks as follows:

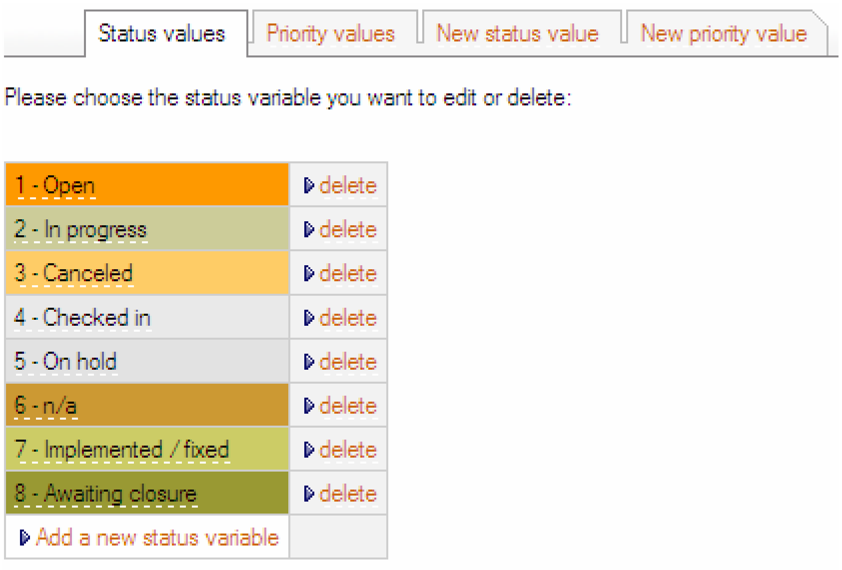


*Fig.4.1 : Status values overview*

When you want to add a status or priority variable, click “New status value” or “New priority value”. The following form will appear:

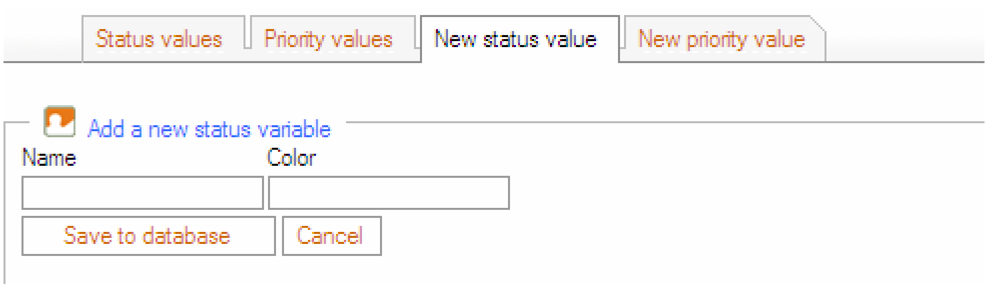


*Fig.4.2 : Adding a status value*

Enter a name, e.g. “Open”. It’s advisable to precede your status or priority name with a number; CRM-CTT will sort the values. This way you can define the order in which the values will appear in the drop-down box. So, let’s call it “1 – Open”.

When you click in the color box, a color scheme will pop up. Choose the color you would like to use for this field and press “Save to database”.

Your new status or priority variable will be available for use instantly.

# MASS-DELETE ENTITIES (LOGICALLY)

Shortcut: ALT-A (administration)

Navigation: Main → Administration → Main → Data management → Delete a set of entities

CRM-CTT knows two ways of deleting entities; logically (default) or physically. The latter should not be used other than for database cleanup (archiving) purposes for it will actually delete records from the database. Logically deleting entities will only cause the entity not to display on the main list anymore.

To logically delete a set of entities, follow the above navigation path. You'll see this form:

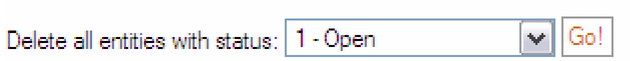


*Fig.5.1 : Deleting a set of entities logically*

Select the status of the entities you whish to delete, and press "Go!". A confirmation dialog will be shown:

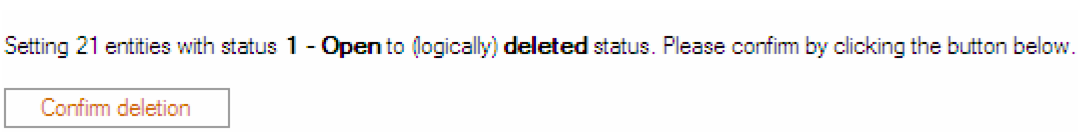


*Fig.5.2 : Confirmation dialog*

Only when you press "Confirm deletion" entities will be logically deleted. You can still access them by using the summary page. When searching on that page, check the "Include deleted entities"-box; CRM-CTT will now also search through deleted entities.

Additionally, you can set global system variable (ALT-S) ShowDeletedViewOption to "Yes" – a navigation tab will now be displayed containing the list of deleted entities.

# PHYSICALLY DELETE AN ENTITY

Shortcut: ALT-P

Navigation: Main → Administration → Main → Data management → Delete one or more entities physically (DB cleanup)

CRM-CTT knows two ways of deleting entities; logically (default) or physically. The latter should not be used other than for database cleanup (archiving) purposes for it will actually delete records from the database. Logically deleting entities will only cause the entity not to display on the main list anymore.

To physically delete a set of entities, follow the above navigation path. You'll see this form:

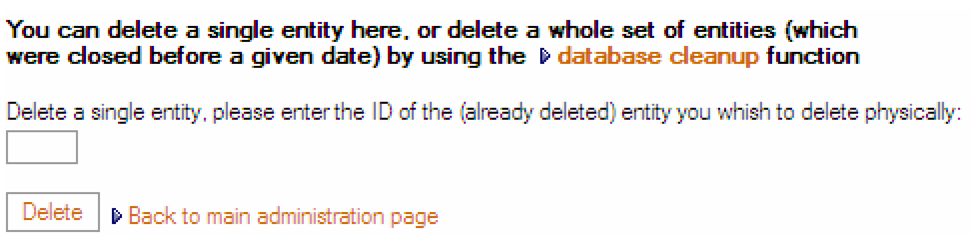


*Fig.6.1 : Deleting an entity physically*

To physically delete 1 entity, enter the entity-id in the box and press delete. Please mind: you can only physically delete entities which are already deleted logically!

When you've entered a valid number, you'll see this confirmation dialog:

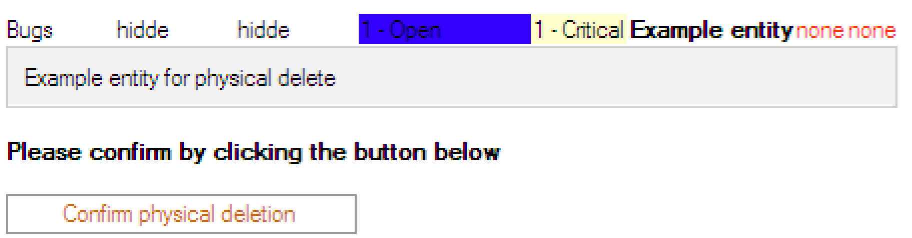


*Fig.6.2 : Deleting an entity physically, confirmation dialog*

Only when you press "Confirm physical deletion" entities will be logically deleted. You can still access them by using the summary page. **You need to run the database integrity check after you've deleted one or more entities physically. Use the ALT-D shortcut to do so.**

# PHYSICALLY DELETE A SET OF ENTITIES

Shortcut: ALT-P

Navigation: Main → Administration → Main → Data management → Delete one or more entities physically (DB cleanup)

CRM-CTT knows two ways of deleting entities; logically (default) or physically. The latter should not be used other than for database cleanup (archiving) purposes for it will actually delete records from the database. Logically deleting entities will only cause the entity not to display on the main list anymore.

To physically delete a set of entities, follow the above navigation path. You'll see this form:

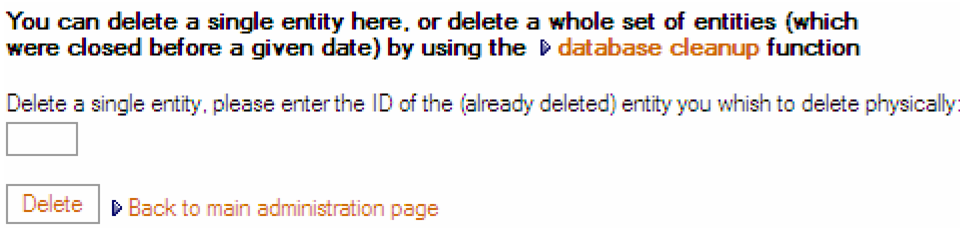


*Fig.7.1 : Deleting an entity physically*

Now click the "database cleanup" link. You'll see a screen containing some information and warnings. Press "next step". You'll see this form:

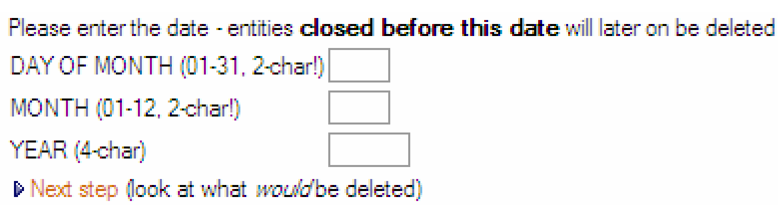


*Fig.7.2 : Selecting date*

Fill in the day, month and year. Entities logically deleted <u>before this date</u> will be physically deleted. After clicking "Next step" CRM-CTT will show a list of what would be deleted (max. 1,000 records). After that, you can click "Next step" again.

A screen similar to this will appear:

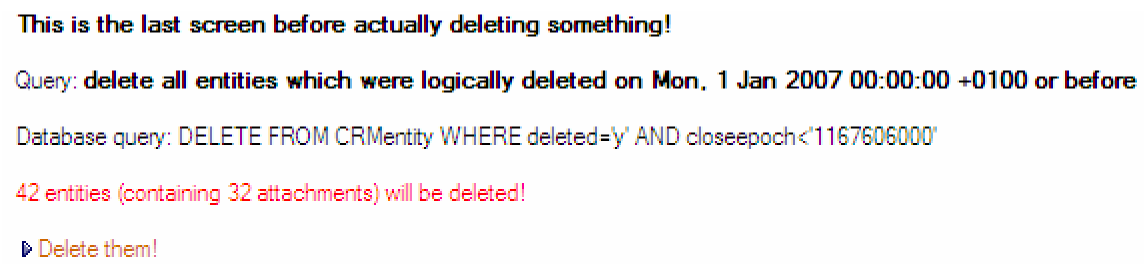


*Fig.7.3 : Actually deleting the entities*

Now, when you click “Delete them”, the concerning entities will be deleted. There’s no way to get them back without restoring a back-up.

## CREATE AN HTML-REPORT

Shortcut: ALT-A (administration)

Navigation: Main → Administration → Templates

HTML-reports can be used to modify the way the summary page displays the results of a search query.

[ not yet implemented ]

# CREATE AN RTF-REPORT

Shortcut: ALT-A (administration)

Navigation: Main → Administration → Templates

Needed: Word processor (e.g. Microsoft Word, OpenOffice Write)

Because the standard PDF-report not always meet you or your companies needs, CRM-CTT provides RTF-reports. Using RTF-reports you can create your own report with your own logo, style, etc. CRM-CTT can use the document to parse reports.

To create a report template, follow the above navigation path. Make sure you have a word processor like Microsoft Word or OpenOffice Write installed on your workstation.

In the template list, there should be an example report template. Click the name of the document. Your browser will ask you what to do with it – tell it to open the document.

| | | | | |
|---|---|---|---|---|
| 21300 | sample_entity_report_template.rtf | Entity report | Upgrade to 2.6.0 | n/a |

*Fig.9.1 : Identifying the example report template*

If the example file is not there, your administrator probably deleted it. Get a copy of it at this internet address: http://download.crm-ctt.com/template_examples/sample_entity_report_template.rtf

When you open the document, you'll see it contains readable text, and some tags enclosed by @'s. These tags will be replaced by information from your entity.

Now just alter the example to your likings. You can also use your or your companies standard document and save it as an RTF-document (e.g. not in MS-Word format, but in Rich Text Format).

For a list of all tags you can use in your report, go to the documentation section of your CRM-CTT installation (Navigation: Main → Administration → Documentation) and select "List of tags".

After you're done with your report, upload it in the templates section (the lower form, "Upload an RTF template). Make sure to set the template type to "RTF Report template".

Now, when in CRM-CTT, click the MS Word icon which is displayed in the upper right corner of the main list:

*Fig.9.2 :The MS Word icon*

A new page will appear:

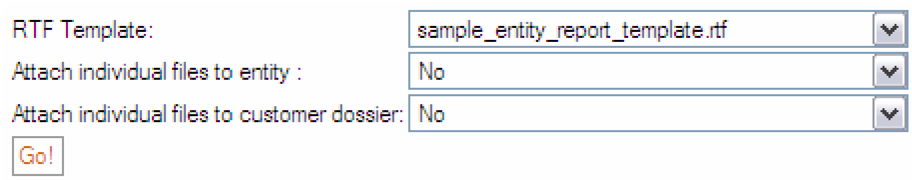


*Fig.9.3 : Creating an RTF-report*

When you press “Go!”, CRM-CTT will create a report based on your template. The content will be the same entities as were displayed on the main list.

# INVOICING

Shortcut: None

Navigation: Main → Invoice & Mailmerge

Prerequisite: EnableInvoiceAndMailmerge should be set to Yes

[ not yet implemented ]

# ADJUSTING THE LAYOUT OF THE MAIN ENTITY LIST

Shortcut: None

Navigation: Main → Administration → Main → Edit lists layout

After navigating to this page, you first have to answer the following question:

Which list do you like to configure?

- The entity lists
- The customer list

- Back to main administration page

*Fig.11.1 : Selecting which list to layout alter*

When you select “The entity list” you’re about to edit the layout of all entity lists at the same time:

- the main list
- the deleted entities list
- the inserted customers list
- the insert-only limited interface list
- the read-only (management-) interface list

The customer list is just 1 list; the list you see when accessing the “Customers” page.

When you’ve made your choice, you’ll see a form containing all available fields. Checking a box behind it will make it appear on the list.

| | |
|---|---|
| Alarm date | ☐ |
| last update | ☐ |
| Creation date | ☐ |
| Age/duration | ☐ |
| **Extra fields:** | |
| Example extra entity field | ☐ |

*Fig.11.2 : Selecting which fields should show up in the main list*

# BOOKMARK SEARCHES

Shortcut: None

Navigation: Summary

To find a set of entities quicker, you can create bookmarks of searches. This way you don't have to enter your search criteria again and again to create the same list.

To create bookmarks, first do a plain search on the summary page, e.g. entities due today: (don't forget to click the "More" link to unhide the advanced search form)

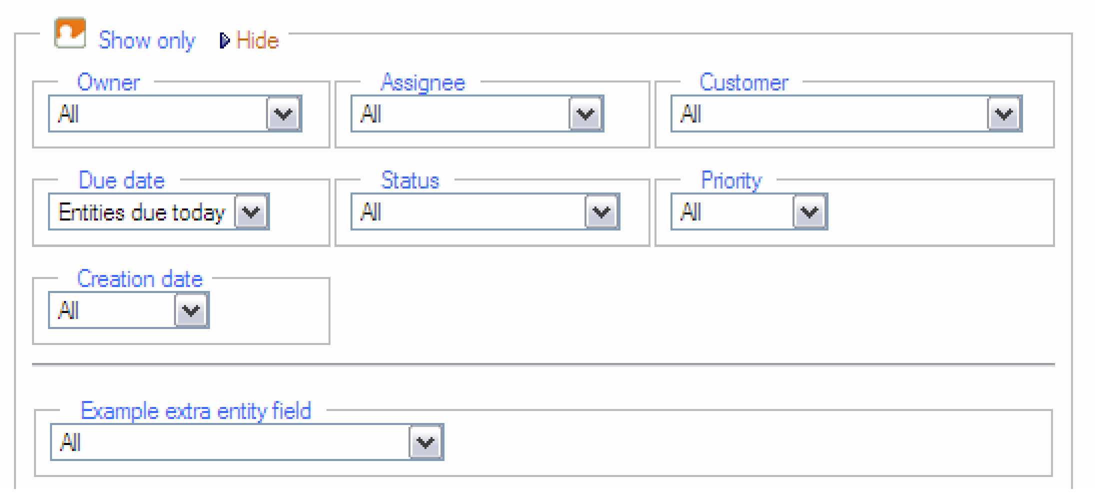


*Fig.12.1 : Searching for entities due today*

When the result page shows up, you'll see a list with entities due today (if you have any). The search form will be printed again above the results. You'll see a link there called "Bookmark(s)":

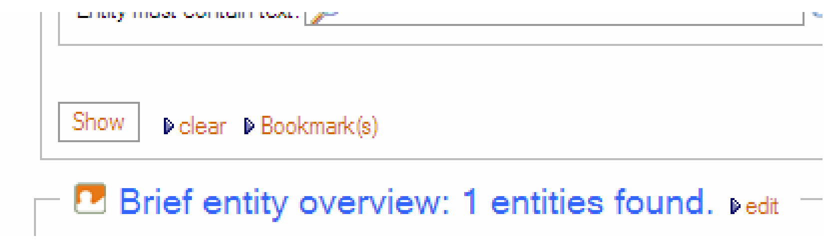


*Fig.12.2 : The result page with the "Bookmark(s)" link*

Click the "Bookmark(s)" link. You'll see a pop-up window containing this form:

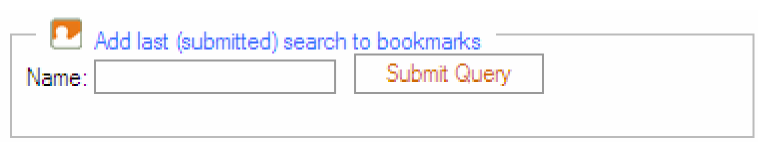


*Fig.12.3 : The bookmark pop-up window*

Give your last search a name (like "Entities due today"):

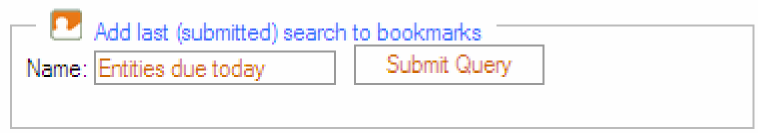


*Fig.12.4 : The bookmark pop-up window filled in*

.. and press "Submit query". The page refreshed and you bookmark appears in the list. Close the window; you bookmark is now saved.

Next, go back to the "Summary" page. Make sure to reload it by navigating to "Main" and than back to "Summary".

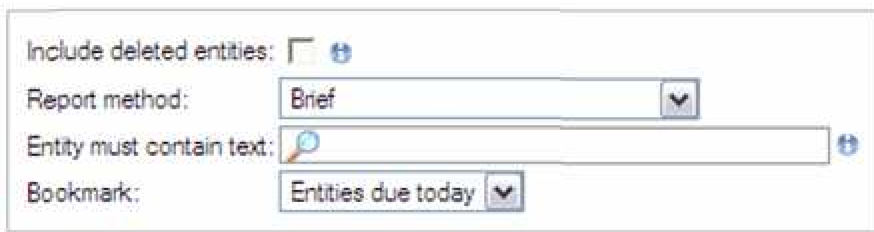


*Fig.12.5 : Using a saved bookmark*

When selecting the bookmark, CRM-CTT will immediately reload the page and display the results.

Warning: please mind that bookmarking a search query for static data (like duedate on march 19) will always return the same results.

# CREATE NEW PAGES (NAVIGATION TABS) WITH CONTENT

Shortcut: None

Navigation: Main → Administration → Custom navigation tabs

With navigation tabs you can embed pages inside or outside CRM-CTT to the navigation bar. Go to the “Custom navigation tabs” section in the administration section, and select “Add a new navigation tab”:

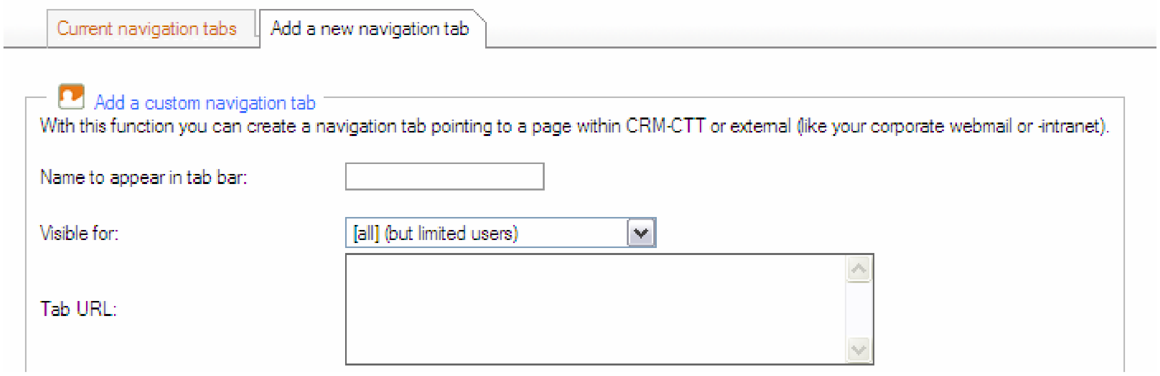


*Fig.13.1 : Creating a new navigation tab*

Give your new tab a name in the first box, and select who may see it in the second. Next, choose a “tab URL” : the URL is the link to the page which must be shown in the page. This can be an internal page:

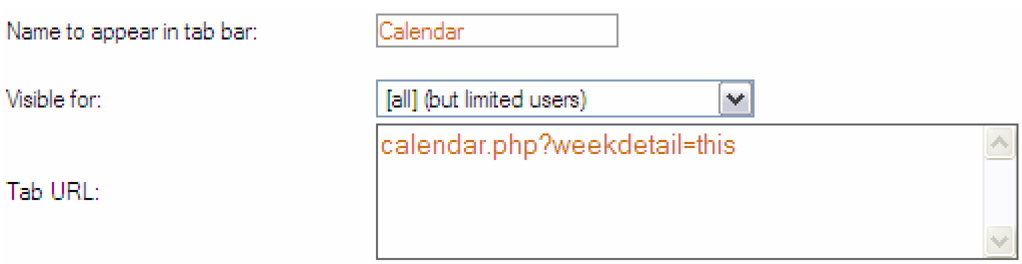


*Fig.13.3 : Linking to an internal page*

.. or an external page:

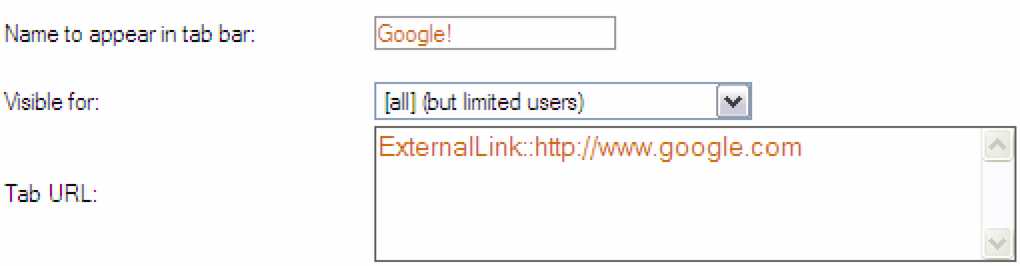


*Fig.13.3 : Linking to an external page*

The page provides clear instructions on how to create an URL including some examples.

## CREATE ACTIONS (TRIGGERS) WHICH DO SOMETHING WHEN A FIELD IS CHANGED BY A USER

Shortcut: ALT-T

Navigation: Main → Administration → Event triggers/workflow

Using triggers you can let CRM-CTT perform an action when a specific event occurs. These events can be any of the following:

- The status of entity is changed by a user
- The priority of entity is changed by a user
- The entity coupled customer is changed by a user
- The owner or assignee of an entity is changed by a user
- One of the extra fields is changed by a user
- A limited user adds an entity
- A limited user updates an entity
- An entity reaches it's due-date
- Somebody adds an entity
- Somebody edits an entity
- A warning is logged
- An error is logged

You can let CRM-CTT perform any of the following actions:

- Mail the owner of the entity (whomever it is)
- Mail the assignee of the entity (whomever it is)
- Mail the customer of the entity (whomever it is)
- Mail the administrator
- Delete/undelete an entity
- Toggle read-only/read-write
- Toggle private/public
- Set /unset close-date of entity (stop-clock/start-clock)
- Re-set create date of entity (re-set clock)
- Set status to [any status]
- Set priority to [any priority]
- Set owner to [any user] or [customer owner]

- Set owner to [the value selected in extra field xx]
- Set assignee to [any user] or [customer owner]
- Set assignee to [the value selected in extra field xx]
- Mail [any] customer
- Mail [any] user
- Extend due-date with 1/2/3/4/5/10/20/30 days
- Set the form type of an entity to a different form

As an example, we'll create a trigger which sends an e-mail to the assignee of an entity when somebody alters the priority of the entity to value "1 – Critical". We'll use e-mail template called "demo" for the e-mail, and the resulting e-mail must be attached to the entity. Also, we want the sample entity report to be created and attached to the e-mail.

Click "New priority trigger" on the triggers page:

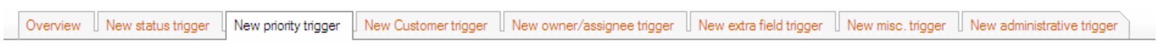


*Fig.14.1 : Choosing the "New priority trigger" option*

Now this form appears:

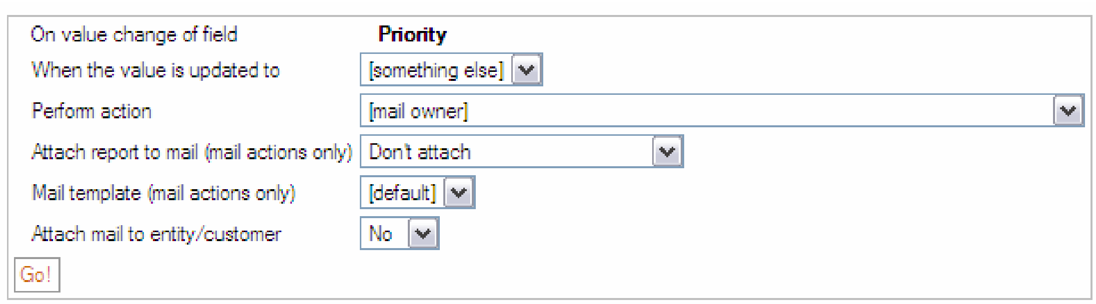


*Fig.14.2 : A blank add-trigger form*

When we enter the right data, it looks as follows:

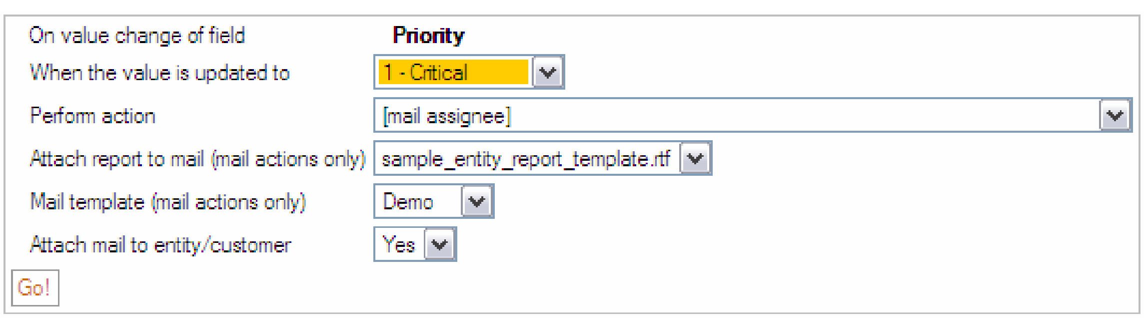


*Fig.14.3 : The trigger-form with values*

You can do this for all events mentioned above.

# CREATE HTML-EMAILS TO USE WITH TRIGGERS

Shortcut: None

Navigation: Main → Administration → Templates

E-mails which are send by triggers are based on templates. In these templates the layout of the e-mail is defined.

Go to the template section like mentioned above. Look for the “Create new HTML template” form:

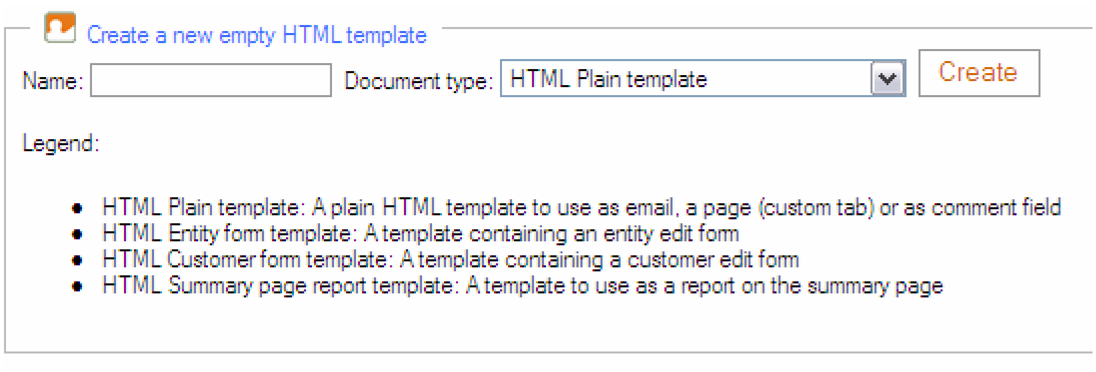


*Fig.15.1 : Create a new HTML template*

Think of a name to use, and set the “Document type” to “HTML Plain template” :


*Fig.15.2 :Setting the name and type for the new template*

After you press “Create”, the page will reload. When you look at the list, you’ll see your newly created form (although it’s still empty) :


*Fig.15.3 :The new empty template in the list of templates*

Now it’s time to edit your new HTML e-mail template. Click “edit”. The page will reload and you’ll see the rich text editor:


*Fig.15.4 :Editing the new empty template*

First, make sure to add a subject. This subject will be used as the subject for your e-mail. You can use template tags for this subject. In other words, an subject like:

```
The priority of entity @EID@ was just set to “@PRIORITY@”!
```

This text will be parsed (e.g.) :

```
The priority of entity 237 was just set to “1 – Critical”!
```

This also goes for the body of your e-mail message. The tags you can use are listed under the rich text editor.

To create a link in your e-mail, type some text, like “click here”. Highlight the text with your mouse, and click the link-button in the editor. Now create a link to “edit.php?e=@EID@”. As the parser will parse this text to “edit.php?e=237” a perfect link will appear.

[advanced] If you use multiple repositories, it’s best to add “&res=[num]” to the link. So, if you’re working in repository 7, create the link as follows: “edit.php?e=@EID@&res=7”. This way you’re sure that users who click this link from an e-mail will enter the right repository.

## SETTING THE LANGUAGE

Shortcut: ALT-L

Navigation: Main → Administration → Global System Values

Setting the language is extremely simple, but sometimes a little hard to find. Navigate the path mentioned above, and scroll all the way down the page. You'll see this:


*Fig.16.1 :Setting the main language*

Set the main language by selecting the preferred language in the upper box, and press "Apply language and mask" button.

If your desired language is not available, check the Administration Manual chapter 3 to see how you can add language packs.