

# **XRMS Open Source CRM**

## **Administrator Guide v 1.2**

(Text highlighted in green indicates questions that need to be answered.)

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# 1 Overview of Administrator Tasks

XRMS Administrators are responsible for five major activity areas that are performed from the Administrator screen. They are:

**System Administration:** Used to maintain the structure of the database and for cleaning up the database.

**Import/Export:** Used to import and export company data.

**Manage:** Used to maintain different aspects of XRMS using access control.

**Types and Statuses:** Maintains information seen in the drop-down lists.

**Plugins:** Used to add or delete XRMS plugins.

Click the **Administration** link on the top bar to see the Administration screen.

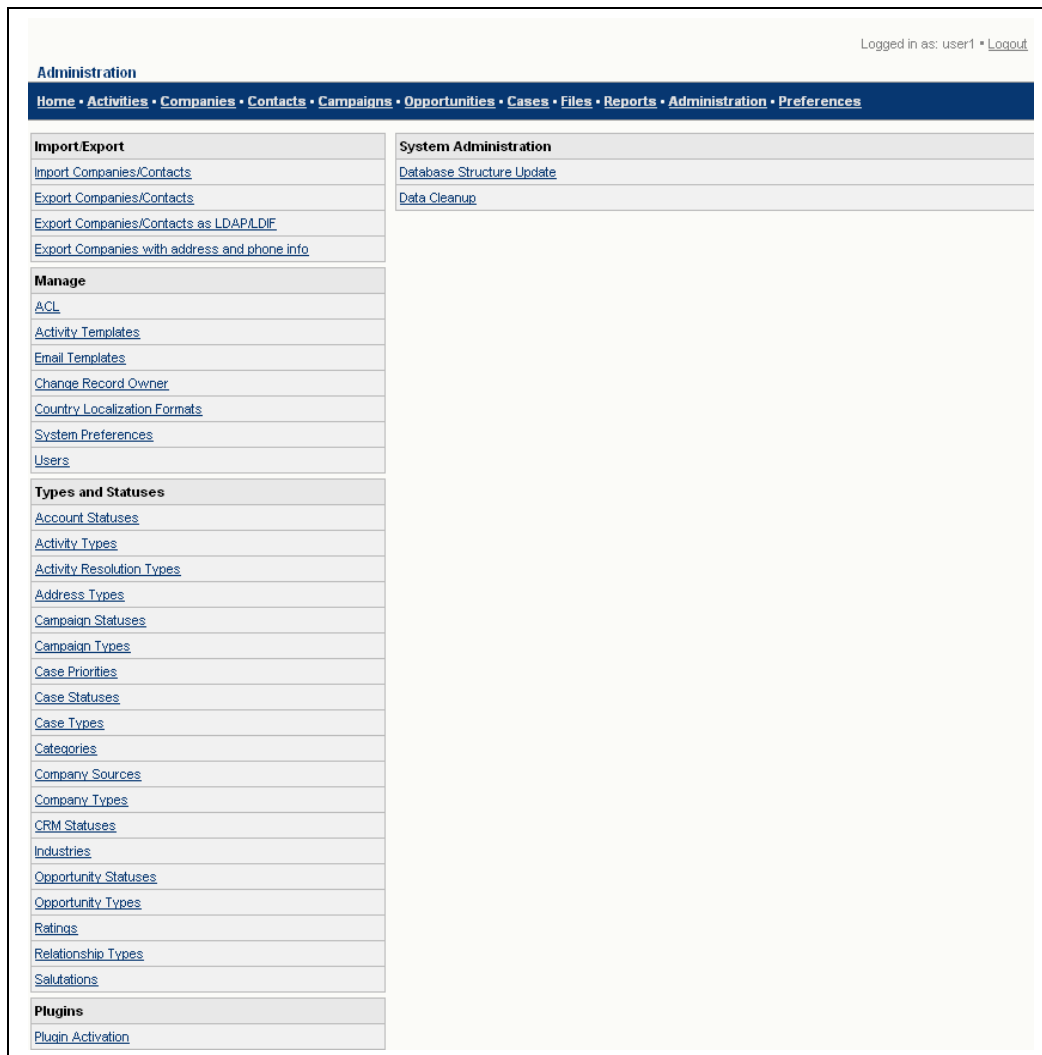


Figure 1: Administration Screen

The five main sets of tasks done by an Administrator are described in detail in the chapters that follow.

## **2 System Administration**

The features that come under this section: Database Structure Update and Data Cleanup are applicable to users of SQL databases.

## 3 Import/Export

Importing and exporting company data is a crucial task for many XRMS users.

The different data types imported to and exported from XRMS are shown in Appendix 2–Default Import Formats.

### 3.1 Import Companies and Contacts

Only a single company record is stored in XRMS with the contacts of each company related to the company record.

Data imported contains the following information:

- Acct. Owner
- CRM Status
- Company Source
- Category
- Industry
- Account Status
- Rating

To import company or contact information into the XRMS database, follow the steps below:

1. Click on the **Administration** link in the XRMS top bar to see the Administration screen (See Figure 1).
2. Go to the Import/Export Box.



*Figure 2: Import/Export Box*

3. Click the **Import Companies/Contacts** link to see the Import screen that contains the Import Companies dialog that displays fields to import company data.
  - 1.
  - 2.
  - 3.

- 4.
- 5.
- 6.
- 7.
- 8.

Import

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) •

Import Companies

File	<input type="text"/> <input data-bbox="865 621 980 653" type="button" value="Browse..."/>
Field Delimiter	<input checked="" type="radio"/> comma <input type="radio"/> tab <input type="radio"/> pipe <input type="radio"/> semi-colon
File Format	act2000 <input type="button" value="v"/>
Account Owner	One, User <input type="button" value="v"/>
CRM Status	Prospect <input type="button" value="v"/>
Company Source	Consultant <input type="button" value="v"/>
Category	General <input type="button" value="v"/>
Industry	Healthcare <input type="button" value="v"/>
Account Status	N/A <input type="button" value="v"/>
Rating	N/A <input type="button" value="v"/>
<input type="button" value="Import"/>	

Figure 3: Import Screen

4. Enter the fields in the Import Companies box as given in the table below:

File: Enter the path of the file that has to be imported, or click **Browse** to select the file.

Field Delimiter: Data is imported in a delimited form. The different delimiters are: comma, tab, pipe, or semi-colon. Select the radio button beside a delimiter to choose one.

File Format: Choose the file format from the drop-down list. File structures supported are: act2000, dunn-and-bradstreet, goldmine, salesforce, outlook, or the XRMS default format given in Appendix 2.

Account Owner: Employee assigned to establish a relationship with the company. Select the option from the drop-down list.

CRM Status: Status of the company with regard to its relationship with your company. For example: Lead, Prospect, Active, and so on. Select the option from the drop-down list.

Company Source: Means by which the company was identified. Select the option from the drop-down list.

Category: Choose the category of the company from the drop-down list.

Industry: Industry in which the company operates. Select the option from the drop-down list.

Account Status: Select the appropriate account status from the drop-down list.

Rating: Select the company rating from the drop-down list.

5. After you enter all the fields, click **Import**.

Imported data is displayed in the Preview Data screen where it is previewed and sent to the XRMS database.

**NOTE:**

When data is imported and there is no country assigned to the country field then the default value is USA. To change the country default, see Appendix 1–List of Country Codes.

The default value for gender is male.

## 3.2 Export Companies and Contacts

All XRMS data can be exported to a delimited file. This is exported in the default format – CSV. This applies to all the export features in the Import/Export box.

## 3.3 Export Companies/Contacts as LDAP/LDIF

**What do we need to explain here ??? When we click this option, we get the message *Unable to Open File for Writing*.**

## 3.4 Export Companies with address and phone info

**What do we need to explain here ??? When we click this option, we get the message *Unable to Open File for Writing*.**

## 4 Managing System Parameters

You can define access control details, create activity templates, change a record owner, maintain country localization formats, as well as define system parameters and create and maintain user details from the Manage box in the Administration screen.

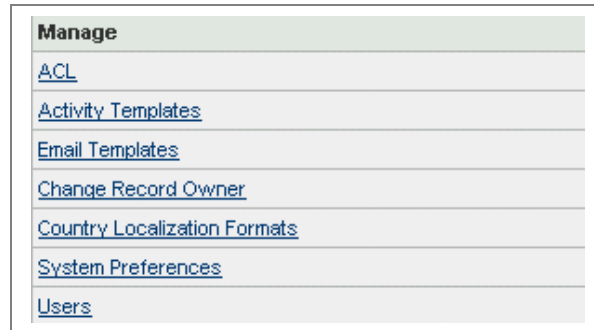


Figure 4: Manage Box

### 4.1 ACL

The Access Control List (ACL) feature is used to restrict access to certain X RMS features to those users who are authorized to perform such tasks.

Navigate to the Administration>ACL link to see the ACL Management screen.

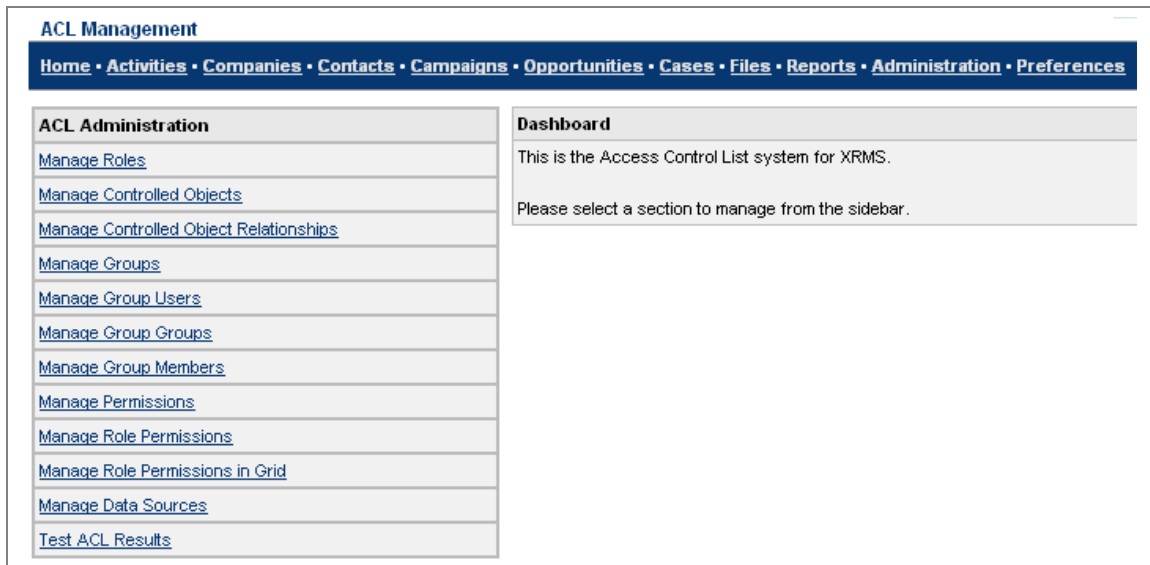


Figure 5: ACL Management Screen

The ACL Management screen has two distinct parts:

**ACL Administration:** The right sidebar displays the Access Control List Administration box. This list consists of various elements of CRMS that are defined and controlled by the administrator.

**Dashboard:** When you click an item in the Access Control List, the Dashboard displays the different screens.

The following section describes the different items in the Access Control List. The procedure to add and edit is common for all the items on the list. For this reason, the procedure is explained only for one item, Manage Roles.

### 4.1.1 Manage Roles

The default roles are:

**User:** Can perform business-related tasks but not administrative tasks.

**Administrator:** Has the authority to perform administrative tasks.

Click the **Manage Roles** link in the ACL Management Screen, Figure 5. You see the Manage Roles screen.

LINK	Role_id	Role_name
<a href="#">Edit</a>	1	User
<a href="#">Edit</a>	11	Regional Marketing Staff
<a href="#">Edit</a>	2	Administrator
<a href="#">Edit</a>	3	Client Services
<a href="#">Edit</a>	4	Inside Sales
<a href="#">Edit</a>	5	New Account Maintenance
<a href="#">Edit</a>	6	Sales Assistant
<a href="#">Edit</a>	7	Sales Management
<a href="#">Edit</a>	8	Sales Reporting
<a href="#">Edit</a>	9	Strategic Communications

[Add New](#)

Figure 6: Manage Roles Screen



### Adding a Role

A significant Access Control List feature is the ability to add a new role.

To add a role:

1. Click **Add New** in the Search Results table of the Manage Roles screen, Figure 6. The Dashboard displays the Role box.

Role	
Role Name	<input type="text" value="Marketing Executive"/>
	<input type="button" value="Create"/>
	<input type="button" value="Return to List"/>

Figure 7: Role - Add Name

2. Enter a new role name in the text box beside Role Name.
3. Click **Create** to create a new role name. You then see the new Role Name displayed in a separate screen.

Click **Return to List** to return to the Search Results table.

### Editing a Role

To edit a role, do the following:

1. Click the **Manage Roles** link in the ACL Management Screen, Figure 5 to see the Manage Roles screen (See Figure 6).
2. To sort the items in the Search Results table, click on the underlined column headings.
3. To select the role that you want to modify, click **Edit** on that row. You see the Role box.

Role	
Role Name	<input type="text" value="Marketing Executive"/>
	<input type="button" value="Update"/>
	<input type="button" value="Return to List"/>

Figure 8: Role - Edit Name

4. Change the existing Role Name and click **Update** to save the changes. You then see the new Role Name displayed on a separate screen.

Click **Return to List** to return to the Search Results table without creating a new role name.

### 4.1.2 Manage Controlled Objects

Navigate to the Administration>ACL link and click the **Manage Controlled Objects** link to reach the Manage Controlled Objects screen.

Logged in as: user1 • [Logout](#)

**Manage Controlled Objects**

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**ACL Administration**

- [Manage Roles](#)
- [Manage Controlled Objects](#)
- [Manage Controlled Object Relationships](#)
- [Manage Groups](#)
- [Manage Group Users](#)
- [Manage Group Groups](#)
- [Manage Group Members](#)
- [Manage Permissions](#)
- [Manage Role Permissions](#)
- [Manage Role Permissions in Grid](#)
- [Manage Data Sources](#)
- [Test ACL Results](#)

**Search Results**

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LINK	Object Name	Source Table	Identifying Field	Data Source
<a href="#">Edit</a>	Company	companies	company_id	CRMS
<a href="#">Edit</a>	Team	broker_ids	id	CRMS
<a href="#">Edit</a>	Email Template	email_templates	email_template_id	CRMS
<a href="#">Edit</a>	Contact	contacts	contact_id	CRMS
<a href="#">Edit</a>	Campaign	campaigns	campaign_id	CRMS
<a href="#">Edit</a>	Case	cases	case_id	CRMS
<a href="#">Edit</a>	Opportunity	opportunities	opportunity_id	CRMS
<a href="#">Edit</a>	Activity	activities	activity_id	CRMS
<a href="#">Edit</a>	File	files	file_id	CRMS
<a href="#">Edit</a>	Division	company_division	division_id	CRMS

[Add New](#)

Figure 9: Manage Controlled Objects Screen

For details of the procedure to add or edit a controlled object, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The different fields involved in the procedure to add or edit are:

Object Name:	The name of the new object.
Source Table:	The table from which the object is taken.
Identifying Field:	The field name in the source table that refers to this object.
user_field:	Identifies the field in the table that contains the user id of the owner of this record. If the field is left blank, it defaults to the "user id".
Data Source:	Choose the source of the data from the drop-down list.

### 4.1.3 Manage Controlled Object Relationships

Controlled object relationships are used to manage the relationship between controlled objects. These relationships are important because they maintain the inheritance between different tables, and are the entities for which permissions are assigned in the Manage Role Permissions feature.

Navigate to the Administration>ACL link and click the **Manage Controlled Object Relationships** link to reach the Manage Controlled Object Relationships screen.

Logged in as: user1 • [Logout](#)

**Manage Controlled Object Relationships**

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**ACL Administration**  
[Manage Roles](#)  
[Manage Controlled Objects](#)  
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[Manage Group Members](#)  
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[Manage Role Permissions](#)  
[Manage Role Permissions in Grid](#)  
[Manage Data Sources](#)  
[Test ACL Results](#)

**Search Results**  
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<a href="#">LINK</a>	ID	Child Object	Parent Object
<a href="#">Edit</a>	1	Company	
<a href="#">Edit</a>	10	Activity	Campaign
<a href="#">Edit</a>	11	Activity	Case
<a href="#">Edit</a>	12	Activity	Division
<a href="#">Edit</a>	13	Activity	Opportunity
<a href="#">Edit</a>	14	Activity	Contact
<a href="#">Edit</a>	15	File	Activity
<a href="#">Edit</a>	16	File	Company
<a href="#">Edit</a>	17	File	Case
<a href="#">Edit</a>	18	File	Campaign

[Add New](#)

*Figure 10: Manage Controlled Object Relationships Screen*

For details of the procedure to add or edit a controlled object relationship, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The fields involved in the procedure to add or edit are:

**Child Controlled Object:** Is the child object in the relationship. This field must always be set.

**Parent Controlled Object:** Is the parent object in the relationship. If this field is left blank, the object is considered top level and not considered to be the child of any object.

**on\_what\_child\_field:** Defines the field in the child table that contains the ID that identifies to which parent object record it belongs. Defaults to the identifying field name in the parent controlled object. A child field must be defined, if a cross table is defined.

**on\_what\_parent\_field:** Defines the field in the cross table which has the ID of the parent object.

**cross\_table:** The name of the table which relates two control objects. This is a separate table from the parent and child tables which contains a row for each link between the parent and child objects. Defaults to blank, and does not use cross table for the relationship.

**singular:** Defines whether or not the child table uses the "on\_what\_table" and "on\_what\_id" fields to link to a parent object. If set to 1, it uses on\_what\_table and on\_what\_id to determine the object relationship with the parent object. Defaults to 0 or blank.

### 4.1.4 Manage Groups

Navigate to the Administration>ACL link and click on the **Manage Groups** link. You see the Manage Groups screen.

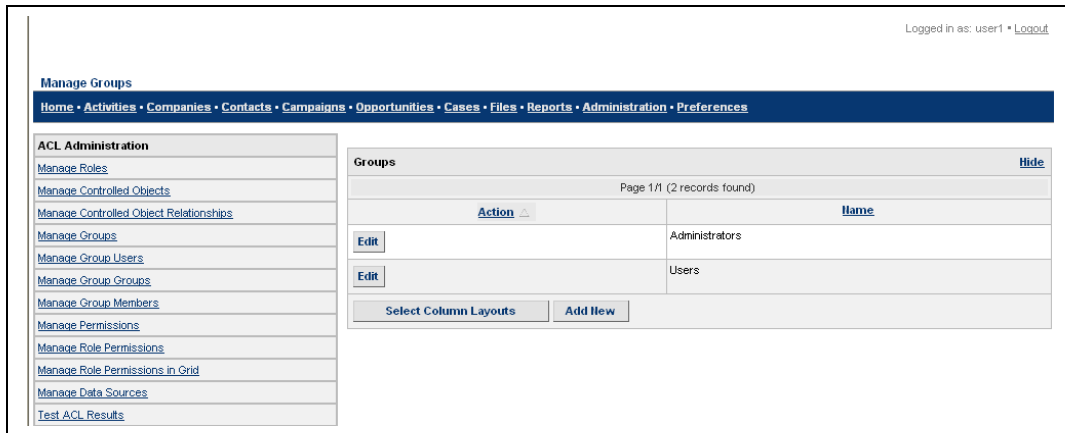


Figure 11: Manage Groups Screen

For details of the procedure to add or edit a group, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The only field involved in the procedure to add or edit is:

Group Name: The name of the group.

#### 4.1.4.1 Select Column Layouts

The Select Column Layouts feature is designed so that you can tailor onscreen search result displays according to your needs. Click **Select Column Layouts** in the Manage Groups screen (See Figure 11) to see the Select Columns box.

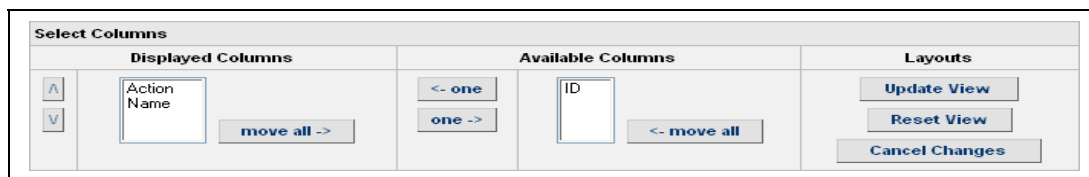


Figure 12: Select Columns

The Available Columns box shows the complete list of column titles to be displayed. The Displayed Columns box shows those columns you wish to have displayed.

1. To select the column you require, place the cursor bar over the column name and:

Click **one** to move items to the Displayed Columns text box, one at a time.

Click **move all** to move all the items to the Displayed Columns text box.

Click **one** to move items to the Available Columns text box, one at a time.

Click **move all** to move all the items to the Available Columns text box.

2. To specify the order in which the columns should be displayed, click **A** and **V** beside the Displayed Columns box. The column title at the top of the box will be leftmost in the display and others will follow in the order they are shown in this list.

3. You can now:

Click **Update View** to see the new column order in the Manage Groups screen (See Figure 11).

Click **Reset View** to return to the columns shown in the Available Columns box prior to any updates.

Click **Cancel Changes** to discard the updates you made and return to the Manage Groups screen, Figure 11.

#### 4.1.5 Manage Users in a Group

You can enter and edit the details of users in groups from the Manage Group Users screen.

Navigate to the Administration>ACL link and click on the **Manage Group Users** link to see the Manage Group Users screen.

**[[Display Error!!!!]]**

Figure 13: Manage Group Users Screen

For details of the procedure to add or edit a group user, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The fields involved in the procedure to add or edit are:

<p>Group: Choose the group from the drop-down list.</p> <p>User: Choose the user from the drop-down list.</p> <p>Role: Choose the role of the user from the drop-down list.</p> <p>source: <b>What is this ????</b></p>
---

Click **Select Column Layouts** to change the onscreen display of fields. For details, see 4.1.4.1.

#### 4.1.6 Manage Groups within a Group

Navigate to the Administration>ACL link and click on the **Manage Group Groups** link to see the Manage Group Groups screen.

**[[Display Error!!!!]]**

Figure 14: Manage Group Groups Screen

For details of the procedure to add or edit a group within a group, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The different fields involved in the procedure to add or edit are:

Group: Choose the group from the drop-down list.

Child Group: Choose the group from the drop-down list.

source: **What is this ????**

### 4.1.7 Manage Group Members

Navigate to the Administration>ACL link and click on the **Manage Group Members** link to see the Manage Group Members screen.

Manage Group Members

Home • Activities • Companies • Contacts • Campaigns • Opportunities • Cases • Files • Reports • Administration • Preferences

ACL Administration

- Manage Roles
- Manage Controlled Objects
- Manage Controlled Object Relationships
- Manage Groups
- Manage Group Users
- Manage Group Groups
- Manage Group Members
- Manage Permissions
- Manage Role Permissions
- Manage Role Permissions in Grid
- Manage Data Sources
- Test ACL Results

Group Members [Hide](#)

Page 1/1 (1 records found)

Action	Group (G)	Controlled Object (G)	Object ID	Criteria Table	Criteria Result Field
<a href="#">Edit</a>	Users	Company	0		

[Select Column Layouts](#) [Add New](#)

Figure 15: Manage Group Members Screen

For details of the procedure to add or edit a group member, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The different fields involved in the procedure to add or edit are:

Group: Choose the group from the drop-down list.

Controlled Object: Choose the controlled object from the drop-down list.

Object ID: Database identifier of the controlled object to add to the group.

Click the **Hide** link if you do not wish to display these columns and associated fields.

Click **Select Column Layouts** to change the onscreen display of fields. For details, see 4.1.4.1.

### 4.1.8 Manage Permissions

To ensure the validity of data, different users are given different levels of permissions to manipulate XRMS data. Available permissions include: Create, Read, Update, and Delete.

Navigate to the Administration>ACL link and click the **Manage Permissions** link to reach the Manage Permission screen.

Manage Permission

Home • Activities • Companies • Contacts • Campaigns • Opportunities • Cases • Files • Reports • Administration • Preferences

ACL Administration

- Manage Roles
- Manage Controlled Objects
- Manage Controlled Object Relationships
- Manage Groups
- Manage Group Users
- Manage Group Groups
- Manage Group Members
- Manage Permissions
- Manage Role Permissions
- Manage Role Permissions in Grid
- Manage Data Sources
- Test ACL Results

Permissions [Hide](#)

Page 1/1 (5 records found)

Action	Name	Abbreviation
<a href="#">Edit</a>	Create	C
<a href="#">Edit</a>	Read	R
<a href="#">Edit</a>	Update	U
<a href="#">Edit</a>	Delete	D
<a href="#">Edit</a>	Export	E

[Select Column Layouts](#) [Add New](#)

Figure 16: Manage Permission Screen

For details of the procedure to add or edit permissions, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The different fields involved in the procedure to add or edit are:

Permission Name: The name of the permission, for example, Delete.

Abbreviation: An abbreviation of the permission name.

Click the **Hide** link if you do not wish to display these columns and associated fields.

Click **Select Column Layouts** to change the onscreen display of fields. For details, see 4.1.4.1.

### 4.1.9 Manage Role Permissions

The Manage Role Permissions feature is used to manage the intersection between roles, permissions, and controlled object relationships. A role is assigned a particular permission on a controlled object relationship within a particular scope. The different scope types are:

User Scope: The role has permission on the child object only if the table has a User field and that field matches the user's User\_ID.

Group: The role has this permission only for those child objects that fall into the group for which the user has this role (or any child groups of this group).

World: The role has this permission on all controlled objects that are the child in this relationship.

The entries in the Manage Role Permissions list also match those assigned or viewed with the Manage Role Permissions in Grid feature.

Role permissions can also be set to inherit or not, based on the Inheritance flag. If the Inheritance flag is set to 1 (Yes), all objects that have a child in this controlled object relationship (parents) inherit the permission. If inheritance is applied to each top-level object relationship, the role will have this permission on every object in the system.

Navigate to the Administration>ACL link and click the **Manage Role Permissions** link to reach the Manage Role Permissions screen.

Logged in as: user1 • [Logout](#)

**Manage Role Permissions**

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**ACL Administration**

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**Role Permissions** [Hide](#)

Page 1/120 (1199 records found) | < << 1 2 3 4 5 6 7 8 9 10 ... >> >1

Action	Role (G)	Child Object (G)	Parent Object	Permission (G)	Scope (G)
<a href="#">Edit</a>	Administrator	Company		Create	World
<a href="#">Edit</a>	User	Campaign		Update	World
<a href="#">Edit</a>	Client Services	File	Contact	Create	Group
<a href="#">Edit</a>	Strategic Communications	File	Case	Read	Group
<a href="#">Edit</a>	Strategic Communications	File	Case	Update	Group
<a href="#">Edit</a>	Strategic Communications	File	Campaign	Create	Group
<a href="#">Edit</a>	Strategic Communications	File	Campaign	Read	Group
<a href="#">Edit</a>	Strategic Communications	File	Campaign	Update	Group
<a href="#">Edit</a>	Strategic Communications	File	Campaign	Delete	Group
<a href="#">Edit</a>	Strategic Communications	File	Contact	Create	Group

[Select Column Layouts](#) [Add New](#)

Figure 17: Manage Role Permissions Screen

For details of the procedure to add or edit permissions for a role, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The fields from which you can add or edit role permissions are:

**Role:** Choose the role from the drop-down list.

**Controlled Object Relationship:** Choose the required relationship from the drop-down list.

**Scope:** Can be User, Group, or World.

**Permission:** Choose the permission from the drop-down list.

**Inheritable Flag:** Select the appropriate option from the drop-down list.

Click **Select Column Layouts** to change the onscreen display of fields. For details, see 4.1.4.1.



#### 4.1.10 Manage Role Permissions in Grid

The Manage Role Permissions in Grid feature can be used on any role that is defined in XRMS. Roles could be: Administrator, Client Support, Regional Marketing Staff, Strategic Communication, Sales Management, and so on.

To manage role permissions within a grid, follow the steps below:

1. Navigate to the Administration>ACL link and click the **Manage Role Permissions in Grid** link to reach the Manage Permissions for Role screen 1.

Logged in as: user1 • [Logout](#)

**Manage Permissions for Role**

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- [Manage Role Permissions](#)
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- [Manage Data Sources](#)
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**Select a Role**

Role:

**Manage Permission for Role**

Figure 18: Manage Permissions for Role Screen 1

2. Select a role from the Role drop-down list. The default roles are user and administrator.
3. Click **Manage Permission for Role** to see the Manage Permissions for Role screen 2. If you choose Regional Marketing Staff as the role, you see the Manage Permissions for <Role Name> screen on the Dashboard.

Logged in as: user1 • [Logout](#)

**Manage Permissions for Role**

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**ACL Administration**  
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**Manage Permissions for Regional Marketing Staff**

	World					Group					User				
	Create	Read	Update	Delete	Export	Create	Read	Update	Delete	Export	Create	Read	Update	Delete	Export
Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Division -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Division	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity -> Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File -> Opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team -> Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Assign Permissions**

Figure 19: Manage Permissions for Role Screen 2

- Select the appropriate check boxes to give relevant permissions to the user or administrator.
- After you select all the required permissions, click **Assign Permissions**.

#### 4.1.11 Manage Data Sources

Data sources are used to manage permissions within databases other than the XRMS database. This is only useful if there are plugins that also use the ACL and define new controlled objects using the new data source, new controlled object relationships, and also register a hook in XRMS to provide database access to the ACL object for this data source.

It is recommended that administrators do not change values in Manage Data Sources, unless they are developing a plugin.

Navigate to the Administration>ACL link and click the **Manage Data Sources** link. You see the Manage Data Sources screen.

Manage Data Sources

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

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- [Manage Permissions](#)
- [Manage Role Permissions](#)
- [Manage Role Permissions in Grid](#)
- [Manage Data Sources](#)
- [Test ACL Results](#)

**Search Results**

LINK	ID	Data Source Name
<a href="#">Edit</a>	1	XRMS

[Add New](#)

Figure 20: Manage Data Sources Screen

For details of the procedure to add or edit a data source, see 4.1.1 Manage Roles, which follows a similar procedure for a role.

The only field involved in the procedure to add or edit is:

Data Source Name: The name of the data source.

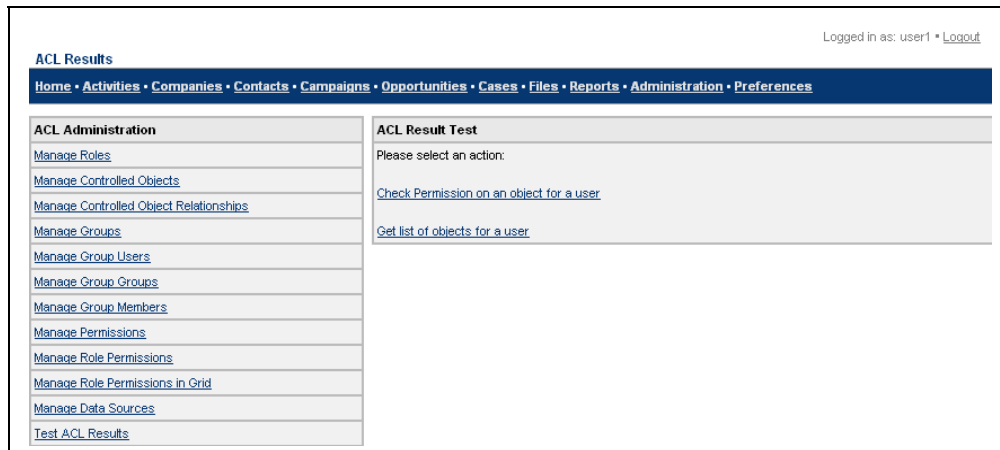
#### 4.1.12 Test ACL Results

The Test ACL Results feature is used to test the results of the ACL configuration that has been just built. This feature can be used in two ways in which ACL is called:

Return the Permissions on an individual object.

Return the list of objects on which the user has a particular permission.

Navigate to the Administration>ACL link and click the **Test ACL Results** link to reach the ACL Result Test screen.



ACL Results

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

ACL Administration	ACL Result Test
<a href="#">Manage Roles</a>	Please select an action:
<a href="#">Manage Controlled Objects</a>	<a href="#">Check Permission on an object for a user</a>
<a href="#">Manage Controlled Object Relationships</a>	<a href="#">Get list of objects for a user</a>
<a href="#">Manage Groups</a>	
<a href="#">Manage Group Users</a>	
<a href="#">Manage Group Groups</a>	
<a href="#">Manage Group Members</a>	
<a href="#">Manage Permissions</a>	
<a href="#">Manage Role Permissions</a>	
<a href="#">Manage Role Permissions in Grid</a>	
<a href="#">Manage Data Sources</a>	
<a href="#">Test ACL Results</a>	

Figure 21: ACL Result Test Screen

You can:

Check permissions on an object for a user.

or

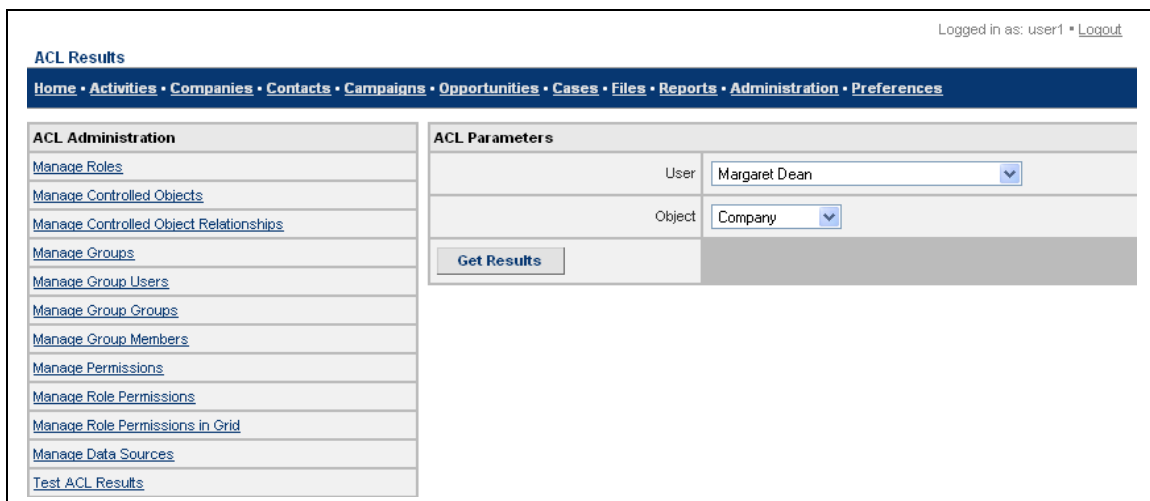
Get the list of objects for a user.

The following paragraphs give details of the procedure for each.

### Check Permission on an Object for a User

To check permission on an object for a user, follow these steps:

1. Click on the **Check Permission on an object for a user** link in the ACL Result Test box. You then see the ACL Parameters box.



ACL Results

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

ACL Administration	ACL Parameters
<a href="#">Manage Roles</a>	User: <input type="text" value="Margaret Dean"/>
<a href="#">Manage Controlled Objects</a>	Object: <input type="text" value="Company"/>
<a href="#">Manage Controlled Object Relationships</a>	<input type="button" value="Get Results"/>
<a href="#">Manage Groups</a>	
<a href="#">Manage Group Users</a>	
<a href="#">Manage Group Groups</a>	
<a href="#">Manage Group Members</a>	
<a href="#">Manage Permissions</a>	
<a href="#">Manage Role Permissions</a>	
<a href="#">Manage Role Permissions in Grid</a>	
<a href="#">Manage Data Sources</a>	
<a href="#">Test ACL Results</a>	

Figure 22: Check Permission on an Object for a User - Enter ACL Parameters

2. Choose the user from the drop-down list.
3. Choose the object from the drop-down list.
4. Click **Get Results**. You see the Search Results box that shows different user ids and the permissions they have to access different types of data.
5. To select the object for which you wish to check permissions, click the radio button in the select on what id column.
6. Click **Calculate Permissions** to see the ACL Results box. The box displays the permissions available to the user for the selected object.

The screenshot shows the 'ACL Results' screen. At the top is a navigation bar with links: Home, Activities, Companies, Contacts, Campaigns, Opportunities, Cases, Files, Reports, Administration, and Preferences. Below this is a sidebar menu for 'ACL Administration' with links: Manage Roles, Manage Controlled Objects, and Manage Controlled Object Relationships. The main content area displays a table with the following data:

Permission Available:	Create
Permission Available:	Read
Permission Available:	Update
Permission Available:	Delete

Figure 23: Check Permission on an Object for a User - ACL Results

### Get List of Objects for a User

To get a list of objects for a user, follow the steps below:

1. Click the **Get list of objects for a user** link in the ACL Result Test screen (See Figure 21). You see the ACL Parameters box.

The screenshot shows the 'ACL Parameters' screen. At the top right, it says 'Logged in as: user1' with a 'Logout' link. Below this is a navigation bar with links: Home, Activities, Companies, Contacts, Campaigns, Opportunities, Cases, Files, Reports, Administration, and Preferences. The left sidebar menu for 'ACL Administration' includes links: Manage Roles, Manage Controlled Objects, Manage Controlled Object Relationships, Manage Groups, Manage Group Users, Manage Group Groups, Manage Group Members, Manage Permissions, Manage Role Permissions, Manage Role Permissions in Grid, Manage Data Sources, and Test ACL Results. The main content area is titled 'ACL Parameters' and contains three dropdown menus: 'User' (set to 'User One'), 'Object' (set to 'Company'), and 'Permission' (set to 'Create'). Below these is a 'Get Results' button.

Figure 24: Get List of Objects for a User - ACL Parameters

2. Choose the user from the drop-down list.
3. Choose the object from the drop-down list.
4. Choose the permission from the drop-down list.
5. Click **Get Results**. You see the ACL Results box that shows company ids, user ids, and other company data.

## 4.2 Activity Templates

Activity templates show the workflow that has been defined using Types and Statuses. An activity template is used to create a new activity when the status or type of a case or opportunity changes. Each activity is assigned to that user who has the corresponding role defined in the activity template and has the least number of open activities. For more information on Workflow, see Chapter 6.

Navigate to the Administration>Activity Templates link to reach the Manage Activity Templates screen.

Activity Templates		
Name	Status	Linked Table
<a href="#">Preliminary Discussions</a>	Meeting	Opportunity Statuses
<a href="#">Pre-proposal Clarifications</a>	Meeting	Opportunity Statuses

Figure 25: Manage Activity Templates Screen

**NOTE:** You can only view an activity template if one has been created.

### 4.2.1 Add an Activity Template

To add an activity template, see 5.2.1 Opportunity Statuses.

The Opportunity Status Details screen provides the option to link activities to opportunity statuses from the Link Activity To Opportunity Status box. When an activity is added to an opportunity status in the Opportunity Status Details screen, the activity is automatically updated to the Manage Activity Templates screen.

### 4.2.2 View, Edit, and Delete Activity Templates

Go to the **Administration** link and click **Activity Templates** to reach the Manage Activity Templates screen (See Figure 25) where the list of activities is shown.

#### To edit an activity template

Follow the steps below:

1. In the Manage Activity Templates screen (See Figure 25), click the name of the activity template you want to edit. You then reach the Activity Template Details: <Activity Name> screen.

**Activity Template Details: Preliminary Discussions** Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Delete Activity Template**

Click the button below to permanently remove this item.

Note: This action CANNOT be undone!

[Delete](#)

**Edit Activity Template Information**

Title:

Duration:

Type:

Role:

Description:

Default Text:

Sort Order:

[Save Changes](#)

*Figure 26: Activity Template Details Screen*

2. Edit the fields as described in the table.

Title: Enter the title of the activity.

Duration: Enter the time period for the completion of the activity. The default measurement is in days.

Type: Choose the type of activity from the drop-down list.

Role: Select the appropriate option from the drop-down list.

Description: Enter a description about the activity.

Default Text: Standard text about the activity.

Sort Order: Defines the order that activities are created within a workflow. New activities will not be included in a workflow until all activities in the previous sort order are completed.

3. After you enter or edit the relevant details, click **Save Changes**. You return to the Manage Activity Templates screen.

### To delete an activity template

Navigate to the Administration>Activity Templates link to reach the Manage Activity Templates screen (See Figure 25) where the list of activities is shown.

1. In the Manage Activity Templates screen, click the name of the activity you want to edit. You then reach the Activity Template Details: <Activity Name> screen (See Figure 26).
2. Go to the Delete Activity Template box on the left side of the screen. Click **Delete** to remove the activity template.

### 4.3 Email Templates

Email templates help to save time as they contain relevant information on a particular subject that can be re-used when necessary.

Navigate to the Administration>Email Templates link to reach the Manage Email Templates screen (See Figure 28). You also see a box with the title Manage Templates.



*Figure 27: Manage Templates Box*

This box has two links:

## Manage Email Templates

## Manage Email Template Types

The way the links function are described in the sections that follow.

### 4.3.1 Manage Email Templates

This feature helps you to create or edit email templates based on existing template types.

Click the **Manage Email Templates** link in the Manage Templates box to see the Manage Email Templates screen (See Figure 28) that shows the list of existing email templates. You see this screen by default when you click on the Email Templates link in the Administration screen (See Figure 1).

Click **Select Column Layouts** in the Manage Email Templates screen to change the onscreen display of fields. For details, see 4.1.4.1.

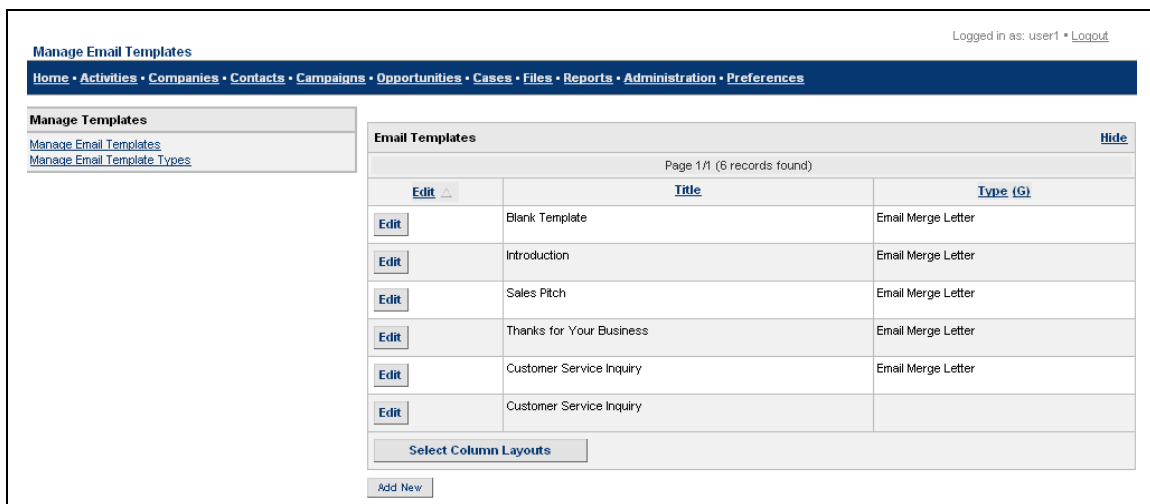




Figure 28: Manage Email Templates Screen

#### 4.3.1.1 Add an Email Template

To add an email template:

1. Click **Add New** in the Manage Email Templates screen (See Figure 28) to reach the Manage Email Template – Add screen.

Manage Email Template

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Manage Templates**

[Manage Email Templates](#)

[Manage Email Template Types](#)

**Email Template**

email\_template\_id: 5

Email Template Type: Email Merge Letter

Title:

Body:

[Create](#)

[Return to List](#)

Figure 29: Manage Email Template - Add Screen

2. Enter an identification number for the template in email\_template\_id.
3. Select the type of template from the existing types in the Email Template Type drop-down list.
4. Enter a name for the template in Title.
5. Enter the text of the new template in Body.
6. Click **Create** to create a new email template. This displays a screen with the details of the email template you created.
7. Click **Return to List** to go to the Manage Email Templates screen.

#### 4.3.1.2 Edit an Email Template

To edit an email template:

1. In the Manage Email Templates screen (See Figure 28), click the **Edit** link corresponding to the required email template in the Title column. You see the Manage Email Template – Edit screen, which is similar to the Manage Email Template – Add screen (See Figure 29). The only difference is that the Update button replaces the Create button in this screen.
2. Make changes to the appropriate fields as required.
3. Click **Update** to save and update the edited email template.

4. Click **Return to List** to go to the Manage Email Templates screen.

### 4.3.2 Manage Email Template Types

This feature helps you to create or edit different types of email templates.

Click the **Manage Email Template Types** link in the Manage Templates box (See Figure 27). You see the Manage Email Template Types screen (See Figure 30) that shows the list of existing email template types.

Click **Select Column Layouts** in the Manage Email Template Types screen to change the onscreen display of fields. For details, see 4.1.4.1.

Manage Email Templates

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Manage Templates**

[Manage Email Templates](#)  
[Manage Email Template Types](#)

**Email Templates** [Hide](#)

Page 1/1 (2 records found)

<a href="#">Edit</a>	<a href="#">Name</a>
<a href="#">Edit</a>	Email Merge Letter
<a href="#">Edit</a>	

[Select Column Layouts](#)

[Add New](#)

Figure 30: Manage Email Template Types Screen

### 4.3.2.1 Add an Email Template Type

To add an email template type:

1. Click **Add New** in the Manage Email Template Types screen (See Figure 30) to see the Manage Email Template Types – Add screen.

Figure 31: Manage Email Template Types - Add Screen

2. Enter an identification number for the type of email template in email\_template\_type\_id.
3. Enter a name for the new template type in Type Name.
4. Click **Create** to create a new type of email template. This displays a screen with the details of the email template type you created.
5. Click **Return to List** to go to the Manage Email Template Types screen.

### 4.3.2.2 Edit an Email Template Type

To edit an email template type:

1. In the Manage Email Template Types screen (See Figure 30), click the **Edit** link corresponding to the required email template type in the Name column. You see the Manage Email Template Types – Edit screen, which is similar to the Manage Email Template Types – Add screen (See Figure 31). The only difference is that the Update button replaces the Create button in this screen.
2. Make changes to the appropriate fields as required.
3. Click **Update** to save and update the edited email template type.
4. Click **Return to List** to go to the Manage Email Template Types screen.

## 4.4 Change Record Owner

To change the owner of open activities, companies, campaigns, opportunities or cases, follow the steps below:

1. Click the **Change Record Owner** link in the Administration screen (See Figure 1), to see the Change Record Owner screen.

Change Record Owner

Logged in as: user1 • [Logout](#)

Home • Activities • Companies • Contacts • Campaigns • Opportunities • Cases • Files • Reports • Administration • Preferences

Current Owner	New Owner	
user1	Ideleon	<a href="#">Change</a>

This will change the owner of open activities, companies, campaigns, opportunities and cases.

Figure 32: Change Record Owner Screen

2. Choose the Current Owner of the activity, company, campaign, opportunity, or case from the drop-down list.
3. Choose the New Owner from the drop-down list.
4. Click **Change** to save the New Owner.

## 4.5 Country Localization Formats

To correctly represent different address and phone formats of countries around the world, follow the steps below:

### To specify the Phone Format

1. Click the **Country Localization Formats** link in the Administration screen (See Figure 1) to see the Country Localization Formats screen that displays a list of countries in alphabetical order, as well as fields and links from which you can specify telephone and address formats.

Country Localization Formats

Logged in as: user1 • [Logout](#)

Home • Activities • Companies • Contacts • Campaigns • Opportunities • Cases • Files • Reports • Administration • Preferences

Country	Phone Format	Address Format
Unmapped country	((( ))) ###-#### <a href="#">Update</a>	\$lines \$city, \$province \$postal_code <a href="#">Edit</a> \$country
Afghanistan	<input type="text"/> <a href="#">Update</a>	\$lines \$city, \$province \$postal_code <a href="#">Edit</a> \$country
Albania	<input type="text"/> <a href="#">Update</a>	\$lines \$city, \$province \$postal_code <a href="#">Edit</a> \$country
Algeria	<input type="text"/> <a href="#">Update</a>	\$lines \$city, \$province \$postal_code <a href="#">Edit</a> \$country

Figure 33: Country Localization Formats

2. Scroll through the list of countries till you reach the one for which you would like to specify a phone or address format.
3. Enter the telephone number format using hashes to represent each digit in the phone number. For example if the country you wish to provide localization details for has a 4-digit state code and a seven-digit number, the hashes would be as follows: (####) ###-####.

4. Click **Update**.

### To specify the Address Format

1. Click **Edit** corresponding to the required format in the Address Format column of the Country Localization Formats screen (See Figure 33). You see the [Edit Address Country Format screen](#).
2. Update address details as necessary.
3. Click **Save Changes**. [Assumed. When I click Edit, I see the msg "Error. No data"]

## 4.6 System Preferences

Click the **Administration** link at the top of an XRMS screen to see the Administration screen (See Figure 1). In this screen, click the **System Preferences** link in the Manage box - Figure 4. You see the System Preferences screen.

**[[Display Error!!!]]**

Figure 34: System Preferences Screen

You can select the language of your choice and the theme (UI colors and presentation) from the relevant drop-down lists.

Click **Save Preferences** to save your choices.

The following sections explain the different system parameters used in XRMS.

### 4.6.1 Activities Default Behavior

It is possible to define specific behaviors for different system parameters that are listed in the Manage System Parameters screen.

Click the **Activities Default Behavior** link in Manage System Parameter screen, see Figure 34, to reach the System Parameter: Activities Default Behavior screen.

Figure 35: System Parameter - Activities Default Behavior

Choose the relevant option from the Activities Default Behavior drop-down list.

Available options are:

**Fast:** The user remains within the current screen.

**Long:** The user is taken to the activities/one screen for detailed description entry.

After you select the option, click **Save Changes** to save the default behavior that you set.

#### 4.6.2 Allow Unassigned Activities

Navigate to Administration>System Parameters and click the **Allow Unassigned Activities** link to see the System Parameter: Allow Unassigned Activities screen.

*Figure 36: System Parameter - Allow Unassigned Activities*

Choose the relevant option from the Allow Unassigned Activities drop-down list.

Available options are:

y (to allow activities to be created without being assigned to a specific owner)

n (to disallow an activity to be created without assigning it to a specific owner)

After you select the option, click **Save Changes**.

#### 4.6.3 Audit Level

Navigate to Administration>System Parameters and click the **Audit Level** link to see the System Parameter: Audit Level screen.

*Figure 37: System Parameter: Audit Level*

Choose the Audit Level option from the drop-down list.

Possible options and what they signify are:

Option	Description
--------	-------------

0-No Logging.	No audit log is created.
1-Inserts and Updates	Audit log created for inserts and updates to the database.
2-Insert and Updates and Login/Logout	Audit log created for inserts and updates to the database as well as logins and logouts.
3-Inserts and Updates, Login/Logout and Views	Audit log created for inserts and updates to the database, logins, logouts, and views.
4-Inserts and Updates, Login/Logout, Views and Searches	Audit log created for inserts and updates to the database, logins, logouts, views, and searches.

After you select the relevant option, click **Save Changes**.

#### 4.6.4 Default GST Offset

Navigate to Administration>System Parameters and click the **Default GST Offset** link to see the System Parameter: Default GST Offset screen.

*Figure 38: System Parameter - Default GST Offset*

Enter a value in the text box beside Default GST Offset. The value you enter should indicate the number of hours ahead of (or behind) Greenwich Sidereal Time (GST). The format to enter this value is: 00:00:00 that corresponds to hours, minutes and seconds respectively.

**NOTE:** If the offset is negative, enter a minus sign in front of the offset. If the offset is positive, enter a plus sign in front of the offset.

After you enter the value, click **Save Changes** to store the offset.

#### 4.6.5 Display Item Technical Details

Navigate to Administration>System Parameters and click the **Display Item Technical Details** link to see the System Parameter: Display Item Technical Details screen.



*Figure 39: System Parameter - Display Item Technical Details*

Choose the relevant option from the drop-down list beside Display Item Technical Details.

The possible options are:

n ( technical details relevant to the items will not be displayed)

y (technical details relevant to the items will be displayed)

After you select the option, click **Save Changes**.

#### 4.6.6 LDAP Version

You can set the appropriate version of the Lightweight Directory Access Protocol (LDAP) server in XRMS. This Internet protocol is used by email programs to look up contact information from a server.

Go to Administration>System Parameters and click the **LDAP Version** link to see the System Parameter: LDAP Version screen.

*Figure 40: System Parameter - LDAP Version*

Choose the appropriate LDAP version from the drop-down list. Current versions provided for in this list are: 2 and 3.

After you select the option, click **Save Changes** to save the LDAP version to be used.

#### 4.6.7 Maximum RSS Feed Entries

Rich Site Summary or Really Simple Syndication (RSS) is a family of XML file formats used to access Web content available for distribution from an online publisher to Web users. RSS offers brief highlights of Web content with a link to the complete article. Web content made available for distribution online is delivered as an XML file and is called an RSS feed.

Setting the maximum of RSS feed entries allows organizations to define the highest number of RSS entries to be made available to XRMS users at any time. This is of particular relevance when the News plugin is enabled.

To set the maximum RSS feed entries, go to Administration>System Parameters and click the Maximum RSS Feed Entries link to see the System Parameter: Maximum RSS Entries screen.

**Figure 41: System Parameter - Maximum RSS Feed Entries**

Enter the value in the text box beside Maximum RSS Feed Entries.

After you enter the value, click **Save Changes**.

#### 4.6.8 Reports - Show No Items Found

If a user generates a report and no items are found, it is possible to display a message to this effect. The text of the message would be "No items found." It is necessary to specify that this message should be displayed.

Go to Administration>System Parameters and click the **Reports-Show No Items Found** link to see the System Parameter: Reports-Show No Items Found screen.

**Figure 42: System Parameter – Reports – Show No Items Found**

Choose the relevant option from the drop-down list.

Available options are:

n (No message is displayed.)

y (Message "No Items Found" is displayed.)

After you select the option, click **Save Changes**.

#### 4.6.9 Reports – Use Horizontal Rule

This feature is provided to define the appearance of XRMS reports. If a horizontal line is required at certain locations in a report it is important to set this feature.

Go to the Administration>System Parameters and click the **Reports-Use Horizontal Rule** link to see the System Parameter: Reports-Use Horizontal Rule screen.

*Figure 43: System Parameter - Reports -- Use Horizontal Rule*

Choose the relevant option from the drop-down list.

The possible options are:

n (Use a horizontal line within XRMS reports)

y (Do not use a horizontal line within XRMS reports)

After you select the option, click **Save Changes**.

#### 4.6.10 RSS Feeds Enabled

Web content made available for distribution online is delivered as an XML file and is called an RSS (Really Simple Syndication or Rich Site Summary) feed. If such feeds should be accessible from XRMS, it is necessary to enable the program to accept the feeds.

Go to Administration>System Parameters and click the **RSS Feeds Enabled** link to see the System Parameter: RSS Feeds Enabled screen.

*Figure 44: System Parameter - RSS Feeds Enabled*

Choose the option from the drop-down list.

Available options are:

n (Do not allow RSS Feeds)

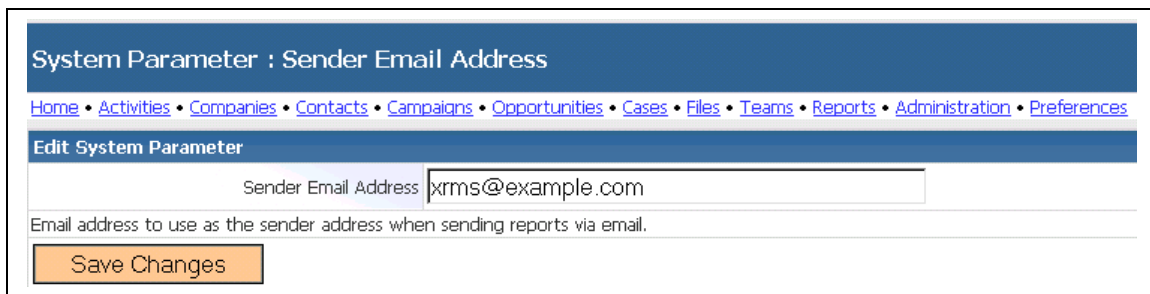
y (Allow RSS Feeds)

After you select the option, click **Save Changes**.

#### 4.6.11 Sender Email Address

When sending reports using email, you can set the email address of the sender using the Sender Email Address parameter.

Go to Administration>System Parameters and click the **Sender Email Address** link to see the System Parameter: Sender Email Address screen.



*Figure 45: System Parameter - Sender Email Address*

Enter the email address that needs to appear in the Sender box for emails in the text box beside Sender Email Address.

Click **Save Changes** to save the email id you have entered.

## 4.7 Users

You can add and edit user names, passwords, and select roles for users from the Manage Users screen.



Click on the **Users** link in the Administration screen (See Figure 1) to see the Manage Users screen.

[illegible]

Figure 46: Manage Users Screen

### 4.7.1 Add a User

1. Navigate to the Administration>Manage box.
2. Click the **Users** link to see the Manage Users screen. This screen shows a list of existing users and also displays the Add New User box.

Add New User	
Role	User 
Last Name	Fergusson *
First Names	Dwight
Username	dwight *
Password	..... *
E-Mail	dwight@interninv.com
Language	English
GMT Offset	-5
Enabled	
<div>Add</div>	

*Figure 47: Add New User Box*

3. In the Add New User box, enter the fields as shown in the table.

Role: Choose the user's role from the drop-down list.

Last Name: Enter the last name of the user.

First Names: Enter the first name(s) of the user.

Username: Enter a login user name that is unique to this user.

Password: Enter a password for this user.

Email: Enter the email address of the user.

Language: This is a display field and shows the default language set.

GMT Offset: Number of hours added or subtracted from Greenwich Mean Time.

Enabled: Select this check box to activate the user.

4. To save the details of the new user, click **Add**. You see the new user added to the Users box in the Manage Users screen.

#### 4.7.2 Edit User Details

User roles and groups can be managed from the User Details screen. A user can be assigned to roles within groups using the sidebar in the Edit User pages.

1. Navigate to the Administration>Manage box and click the **Users** link to reach the **Manage Users** screen.
2. Review the list of users and their details as shown in Figure 46 and click on the username of the user in the Manage Users screen whose details you want to change. You see the User Details screen.

**User Details: Dwight Fergusson** Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**User Roles**

Group	Role	Action
Users	User	<a href="#">Delete</a>
Users <input type="button" value="v"/>	<input type="button" value="v"/>	<a href="#">Add Role</a>

**Edit User Information**

Last Name:

First Names:

Username:

E-Mail:

Language: English

GMT Offset:

Enabled: ☒

[Save Changes](#) [Change Password](#)

**Delete User**

Click the button below to permanently remove this item.

Note: This action CANNOT be undone!

[Delete](#)

Figure 48: User Details Screen

3. All the fields in this screen are the same as in the Add New User box (See 4.7.1 Add a User). The only fields missing here are Role and Password.
4. After you make the changes, click **Save Changes**.

5. To change the Password, click **Change Password**. You see the Change Password screen.

Change Password

Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Change Password**

New Password

Confirm New Password

[Save Changes](#)

*Figure 49: Change Password Screen*

6. Enter the new password in the fields and click **Save Changes**.

### 4.7.3 Delete a User

Follow these steps to delete an XRMS user.

1. Navigate to Administration>Manage box and click the **Users** link to see the Manage Users screen.
2. Click on the username of the person whose details you wish to delete to get to the User Details screen (See Figure 48).
3. Review details of the user in the User Details screen.
4. Click **Delete** in the Delete User box to delete the details of this user.
- 5.

## 5 Types and Statuses

Before XRMS can be implemented, it is necessary that the various default values to be used are reviewed and edited appropriately. Defaults can be added, modified, or deleted. However, when a default is deleted, it loses all its associations with companies, contacts, cases, and campaigns.

The different XRMS defaults are:

Types and Statuses
<a href="#">Account Statuses</a>
<a href="#">Activity Types</a>
<a href="#">Activity Resolution Types</a>
<a href="#">Address Types</a>
<a href="#">Campaign Statuses</a>
<a href="#">Campaign Types</a>
<a href="#">Case Priorities</a>
<a href="#">Case Statuses</a>
<a href="#">Case Types</a>
<a href="#">Categories</a>
<a href="#">Company Sources</a>
<a href="#">Company Types</a>
<a href="#">CRM Statuses</a>
<a href="#">Industries</a>
<a href="#">Opportunity Statuses</a>
<a href="#">Opportunity Types</a>
<a href="#">Ratings</a>
<a href="#">Relationship Types</a>
<a href="#">Salutations</a>

*Figure 50: Types and Statuses*

There is no fixed limit on the number of items that can be added under a single group.

Types and statuses in Activity Templates are used to define the Workflow. For more details, see Chapter 6 Workflow.



## 5.1 Add a Default Value

This section is divided into two parts. Defaults that:

Follow a common procedure to add values.

Do not follow a common procedure to add values.

### 5.1.1 Defaults that Follow a Common Procedure to Add Values

The defaults that follow a common procedure to add values share many fields in common. The fields present in the different default screens are indicated by check marks in the table below.

XRMS Defaults	Short Name	Full Name	Full Plural Name	Display HTML	Score Adjustment	Description	Open Status
Account Statuses							
Activity Types							
Activity Resolution Types							
Campaign Statuses							
Campaign Types							
Case Priorities							
Case Types							
Categories							
Company Sources							
Company Types							
CRM Statuses							
Industries							

XRMS Defaults	Short Name	Full Name	Full Plural Name	Display HTML	Score Adjustment	Description	Open Status
Opportunity Statuses							
Opportunity Types							
Ratings							

To add values, click on the **Administration** link in the top bar to see the Administration screen (See Figure 1).

Go the Types and Statuses box (See Figure 50) to select the items for which you would like to add default values.

Since the procedure to add values is common across the types and statuses we will consider the following two defaults to see how values are added:

Opportunity Statuses that individually contains the largest number of fields.

Case Priorities that has some fields not available in Opportunity Statuses.

Together, these two items cover the entire list of fields.

#### 5.1.1.1 Opportunity Statuses

Opportunity Statuses is a default to create different status levels for opportunities. New, Preliminaries, Discussions, and Negotiations are some examples of status levels.

To create a new opportunity status, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Opportunity Statuses** link to see the Manage Opportunity Statuses screen.

2.

**Manage Opportunity Statuses** Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Add New Opportunity Status**

Short Name:

Full Name:

Full Plural Name:

Display HTML:

Description:

Open Status:

**Opportunity Statuses**

Name	Description	Move
<a href="#">New</a>		<a href="#">down</a>
<a href="#">Preliminaries</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">Discussion</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">Negotiation</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">Closed/Won</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">Closed/Lost</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">Closed/Lost</a>		<a href="#">up</a> <a href="#">down</a>

Figure 51: Manage Opportunity Statuses

3. Enter the fields in the Add New Opportunity Status box as given in the table below:

Short Name:	Enter an abbreviation for the status. For example, OP for open.
Full Name:	Enter the complete name of the status. For example, Open.
Full Plural Name:	Enter the plural of the status name.
Display HTML:	Enter the HTML format of the status name.
Description:	Enter a description of the type of status that is being dealt with.
Open Status:	Choose the status of the opportunity from the drop-down list. The options are: open, closed and won, closed and lost.

4. When you have finished entering the fields, click **Add** to see the opportunity status added to the Opportunity Statuses table.

### To Reorder Items in the Opportunity Statuses table

5. Click the **up** or **down** link as required in the Move column beside the opportunity status that you wish to reorder in the table.
6. The opportunity status moves up or down one row as appropriate.

### To link an Opportunity Status to a Workflow Activity

1. Click on the name of an Opportunity Status in the Manage Opportunity Status screen, Figure 51. You see the Edit Opportunity Status Information screen with the [Link Workflow Activity To Opportunity Status box](#) where you can edit Opportunity Status information and link an Opportunity Status to a workflow activity.

Link Workflow Activity To Opportunity Status				
Title	Duration (defaults to days)	Type	Role	Sort Order
<input type="text"/>	<input type="text"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text"/> <input type="button" value="Add"/>
<a href="#">Preliminary Discussions</a>	1	Meeting	User	1 <a href="#">down</a>
<a href="#">Pre-proposal Clarifications</a>	1	Client Meeting	Regional Marketing Staff	2 <a href="#">up</a>

Figure 52: Link Opportunity Status to Workflow Activity Box

2. Enter details in the following fields.

Title:	Enter the name of the activity to which you wish to link an opportunity status.
Duration:	Enter the number of days by which the activity should be complete.
Type:	Select the opportunity type from the drop-down list.
Role:	Select to which the activity should be assigned from the drop-down list.
Sort Order:	Enter the order of display of this item in the table that is created.

3. Click **Add**. This saves the details and displays them in a row in the table below.

### To Edit or Delete an Opportunity Status

To edit or delete an activity linked to an opportunity status, click the activity name to see the Activity Details screen. See 4.2.2 View, Edit, and Delete Activity Templates for more details.

#### 5.1.1.2 Case Priorities

Case Priorities is a default to create different types of priority levels for cases. Low, Medium, High, and Critical are some examples of priority levels.

To create a new type of case priority, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Case Priorities** link to see the Manage Case Priorities screen.

Manage Case Priorities		Logged in as: user1 • <a href="#">Logout</a>					
<a href="#">Home</a> • <a href="#">Activities</a> • <a href="#">Companies</a> • <a href="#">Contacts</a> • <a href="#">Campaigns</a> • <a href="#">Opportunities</a> • <a href="#">Cases</a> • <a href="#">Files</a> • <a href="#">Reports</a> • <a href="#">Administration</a> • <a href="#">Preferences</a>							
<b>Add New Priority Type</b>		<b>Case Priorities</b> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td><a href="#">Critical</a></td> </tr> <tr> <td><a href="#">High</a></td> </tr> <tr> <td><a href="#">Low</a></td> </tr> <tr> <td><a href="#">Medium</a></td> </tr> </tbody> </table>	Name	<a href="#">Critical</a>	<a href="#">High</a>	<a href="#">Low</a>	<a href="#">Medium</a>
Name							
<a href="#">Critical</a>							
<a href="#">High</a>							
<a href="#">Low</a>							
<a href="#">Medium</a>							
Short Name	<input type="text" value="VLow"/>						
Full Name	<input type="text" value="Very Low"/>						
Full Plural Name	<input type="text" value="Very Low"/>						
Display HTML	<input type="text" value="Very Low"/>						
Score Adjustment	<input type="text" value="0"/>						
<input type="button" value="Add"/>							

Figure 53: Manage Case Priorities Screen

2. Enter the fields in the Add New Priority Type box as given in the table below:

<p>Short Name: Enter a short name for the priority type.</p> <p>Full Name: Enter the entire name of the priority type.</p> <p>Full Plural Name: Enter the plural of the name.</p> <p>Display HTML: Enter the HTML format of the priority name.</p> <p>Score Adjustment: <b>[[What is this???]]</b></p>
--

3. After you enter values in the fields, click **Add**. The new value added is shown in the Case Priorities box.

Case Priorities	
	Name
<a href="#">Critical</a>	
<a href="#">High</a>	
<a href="#">Low</a>	
<a href="#">Medium</a>	
<a href="#">Very Low</a>	

Figure 54: Case Priorities Box

### 5.1.2 Defaults that Do Not Follow a Common Procedure to Add Values

The defaults that do not follow a common procedure to add values are:

- Address Types
- Case Statuses
- Relationship Types
- Salutations

#### 5.1.2.1 Address Types

Address Types is a default to create different types of addresses. Commercial and Residential are examples of address types.

To create a new address type, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Address Types** link to see the Manage Address Types screen.

<b>Manage Address Types</b>		Logged in as: user1 • <a href="#">Logout</a>
<a href="#">Home</a> • <a href="#">Activities</a> • <a href="#">Companies</a> • <a href="#">Contacts</a> • <a href="#">Campaigns</a> • <a href="#">Opportunities</a> • <a href="#">Cases</a> • <a href="#">Files</a> • <a href="#">Reports</a> • <a href="#">Administration</a> • <a href="#">Preferences</a>		
<b>Add New Address Type</b>		<b>Address Types</b>
Address Type	<input type="text" value="individual"/>	Name
Sort Value	<input type="text" value="3"/>	<a href="#">unknown</a>
<input type="button" value="Add"/>		<a href="#">commercial</a>
		<a href="#">residential</a>

Figure 55: Manage Address Types

2. Enter the fields in the Add New Address Type box as given in the table below:

<p>Address Type: Enter the name of the address type. For example, Individual.</p> <p>Sort Value: Sort order for the address type. The sort order helps you define the order in which the address types are displayed when an address type is created or edited.</p>
---

3. After you enter the fields, click **Add**. You see the new value displayed in the Address Types box of the Manage Address Types screen

Address Types	
	Name
<a href="#">unknown</a>	
<a href="#">commercial</a>	
<a href="#">individual</a>	
<a href="#">residential</a>	

Figure 56: Address Types Box

### 5.1.2.2 Case Statuses

Case Statuses are used to create different status levels for different status types.

To create a new case status, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Case Statuses** link to see the Manage Case Statuses screen.
2. From the Case Type drop-down list, select the Case Type for which you wish to view, add, edit, or delete a case status. This takes you to the next Manage Case Statuses screen that list case statuses for this case type. You can also add a case status here.

Figure 57: Manage Case Statuses Screen

3. Enter the fields in the Add New Case Status box as given in the table below:

Short Name: Enter a short name for the case status.

Full Name: Enter the entire name of the case status.

Full Plural Name: Enter the plural of the case status.

Display HTML: Enter the HTML format of the case status.

Description: Enter a description for the case status that you plan to add.

4. After entering all the fields, click **Add**. You see the new value in the Case Statuses box of the Manage Case Statuses screen.

### 5.1.2.3 Relationship Types

XRMS handles different types of relationships between one company and another company, between contacts in different companies, and between a contact and a company, and vice versa. In fact, relationships can be defined between almost any entity in the system: companies, contacts, divisions and so on.

The Relationship Types default is used to create different relationship roles.

To create a new relationship type, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Relationship Types** link to see the Manage Relationship Types screen.

**Manage Relationship Types** Logged in as: user1 • Logout

Home • Activities • Companies • Contacts • Campaigns • Opportunities • Cases • Files • Reports • Administration • Preferences

**Add New Role**

Relationship Name:

From What Table:

To What Table:

From Text:

To Text:

Pre-Text Formatting:

Post-Text Formatting:

Name	Tables	Relationship	Formatting
<a href="#">2nd Contact</a>	contacts contacts	is 2nd Contact of has 2nd Contact	
<a href="#">2nd Contact</a>	contacts contacts	has 2nd Contact is 2nd Contact of	
<a href="#">Accountant</a>	contacts contacts	accountant of has accountant	
<a href="#">Accountant</a>	contacts contacts	has accountant accountant of	
<a href="#">Administrative assistant</a>	contacts contacts	administrative assistant of has administrative assistant	
<a href="#">Administrative assistant</a>	contacts contacts	has administrative assistant administrative assistant of	
<a href="#">Analyst</a>	contacts contacts	Analyst of has Analyst	
<a href="#">Analyst</a>	contacts contacts	has Analyst Analyst of	

Figure 58: Manage Relationship Types Screen

2. Enter the fields in the Add New Role box as given in the table below:

Relationship Name: Enter the name of the relationship. For example, Consultant.

From What Table: Enter the name of the database table from which this relationship is being created.

To What Table: Enter the name of the database table to which the relationship is being created.

From Text: Enter information regarding the relationship in terms of how one entity (contact or company) relates to the other. For example: vendor of, consultant to, or subsidiary of.

To Text: Enter details of how the other entity is related to the first. For example, purchaser of, has consultant, or parent company.

Pre-Text Formatting and Post-Text Formatting: Used before and after the relationship name to result in appropriate HTML markup on the title. Example <b> and </b> in the corresponding fields will make the display of the relationship name bold.

- After you enter the fields, click **Add**. The new value is shown in the Relationship Types box of the Manage Relationship Types screen.

#### 5.1.2.4 Salutations

The salutations feature is used to create different forms of addressing a contact.

To create a new salutation, follow the steps below:

- Go to Administration>Types and Statuses and click the **Salutations** link to see the Manage Salutations screen.

Figure 59: Manage Salutations Screen

- Enter the fields in the Add New Salutation box as given in the table below.

Salutation: Enter the name of the salutation. For example, Dean, Dr., and so on.

Sort Value: Enter the order the salutation should appear in the Salutations list. If you enter 5 here, it appears 5<sup>th</sup> in the list.

- After you enter the fields, click **Add**. The new value is shown in the Salutations box and is listed in the order you provided in Sort Value.

## 5.2 Edit and Delete Default Values

You can edit default values in the Default Value Details screen. The procedure to edit and delete a default value is the same for all defaults.

This guide provides the procedure to edit and delete values in Opportunity Statuses, Activity Types, and Categories. This information is presented in the following sections.

### 5.2.1 Opportunity Statuses

To edit an opportunity status, follow the steps below:

- Go to Administration>Types and Statuses and click the **Opportunity Statuses** link to see the Manage Opportunity Statuses screen (See Figure 51). The Opportunity Statuses box on the right of the screen lists all the values created for the default.



- Click the status to be edited. For example, Discussion. You would then see the Opportunity Status Details: Discussion screen.

3.

Figure 60: Opportunity Status Details Screen

- To edit information about the Opportunity status, go to the Edit Opportunity Status Information box. All the fields in this box are the same as in Add New Opportunity Status box in Figure 51: Manage Opportunity Statuses.
- After you make the required changes, click **Save Changes**.

### To link a Workflow Activity to an Opportunity Status

You can link a workflow activity to a given opportunity.

- Enter the fields to link an activity as given in the table below:

Title: Enter the title of the activity.
Duration: Enter the duration of the activity.
Type: Choose the type of activity from the drop-down list.
Role: Select the role to be linked to the opportunity from the drop-down list.
Sort Order: Enter the order of this workflow activity.

- Click **Add**. The activity is displayed below the row of fields that you entered.

Figure 61: Link Workflow Activity to Opportunity Status

## To delete an Opportunity Status

To delete an Opportunity Status, click **Delete** in the Delete Opportunity Status box in Figure 60. This deletes the Opportunity Status from all the drop-down lists in which it currently exists.

## 5.2.2 Activity Types

Activity Types are used to determine the different types of activities in the system. The activity types provided with XRMS cannot be edited, and are marked as such in the database. Any newly added user activity type could be edited.

To edit an activity type, do the following:

1. Go to Administration>Types and Statuses box and click the **Activity Types** link to see the Manage Activity Types screen.

**Manage Activity Types** Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Add New Activity Type**

Short Name:

Full Name:

Full Plural Name:

Display HTML:

Score Adjustment:

Activity Types		Move
Name		
<a href="#">call to</a>		<a href="#">down</a>
<a href="#">call from</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">e-mail to</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">e-mail from</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">fax to</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">fax from</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">letter to</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">letter from</a>		<a href="#">up</a> <a href="#">down</a>
<a href="#">internal</a>		<a href="#">up</a> <a href="#">down</a>

Figure 62: Manage Activity Types Screen

2. The Activity Types box lists all the activities created. Click on the activity you wish to edit. For example, Fax. You see the Activity Type Details: Fax screen.

**Activity Type Details: Fax** Logged in as: user1 • [Logout](#)

[Home](#) • [Activities](#) • [Companies](#) • [Contacts](#) • [Campaigns](#) • [Opportunities](#) • [Cases](#) • [Files](#) • [Reports](#) • [Administration](#) • [Preferences](#)

**Participant Positions**

Advisor: [Edit](#)

Position Name:

**Edit Activity Type Information**

Short Name:

Full Name:

Full Plural:

Display HTML:

Score Adjustment:

**Delete Activity Type**

Click the button below to permanently remove this item.

Note: This action CANNOT be undone!

Figure 63: Activity Type Details Screen

3. To make changes, go to the Edit Activity Type Information box.

Modify any of the fields as given in the table below:

Short Name:	Enter a short name for the activity type.
Full Name:	Enter the entire name of the activity type.
Full Plural Name:	Enter the plural of the name.
Display HTML:	Enter the HTML format of the name.
Score Adjustment:	<b>[[What is this??]]</b>

4. After you make all the changes, click **Save Changes**.

### To add a new Participant Position

Participant positions link contacts to activities. The default position is Participant and exists in each activity type. Other participant positions need to be defined for each activity type. Example: CC and BCC and To and From are all positions defined for email types.

To define a participant position:

1. Go to the Participant Positions box in the Activity Type Details screen, Figure 63.
2. Enter a new role in the text box beside Position Name.
3. Click **Add New Participant Position** to save the new role.

### To Edit an Existing Participant Position

1. In the Participant Positions box in the Activity Type Details screen (See Figure 63), click **Edit** beside the existing position that you wish to edit. You see the Edit Activity Participant Position screen.

<b>Edit Activity Participant Position:</b>		Logged in as: user1 • <a href="#">Logout</a>
<a href="#">Home</a> • <a href="#">Activities</a> • <a href="#">Companies</a> • <a href="#">Contacts</a> • <a href="#">Campaigns</a> • <a href="#">Opportunities</a> • <a href="#">Cases</a> • <a href="#">Files</a> • <a href="#">Reports</a> • <a href="#">Administration</a> • <a href="#">Preferences</a>		
<b>Participant Position</b>		
activity_participant_position_id	<input type="text" value="4"/>	
Activity Type	<input type="text" value="Client Seminar"/>	
Participant Position	<input type="text" value="Advisor"/>	
Global	<input type="text"/>	
		<input type="button" value="Update"/>
		<input type="button" value="Return"/>

Figure 64: Edit Activity Participant Position Screen

2. Make changes to the fields as necessary.

3. Click **Update** to save the edited details and see the Participant Position Details screen.
4. Click **Return** to go back to the Activity Type Details screen.

### To delete an Activity Type

To delete an activity type, click **Delete** in the Delete Activity Type box in Figure 63. This permanently deletes the activity from all screens.

### 5.2.3 Categories

To edit a category, follow the steps below:

1. Go to Administration>Types and Statuses and click the **Categories** link to see the Manage Categories screen.

Manage Categories		Logged in as: user1 • <a href="#">Logout</a>								
<a href="#">Home</a> • <a href="#">Activities</a> • <a href="#">Companies</a> • <a href="#">Contacts</a> • <a href="#">Campaigns</a> • <a href="#">Opportunities</a> • <a href="#">Cases</a> • <a href="#">Files</a> • <a href="#">Reports</a> • <a href="#">Administration</a> • <a href="#">Preferences</a>										
<b>Add New Category</b>		<b>Categories</b>								
Short Name	<input type="text" value="INSUR"/>									
Full Name	<input type="text" value="Insurance"/>									
Full Plural Name	<input type="text" value="Insurance"/>									
Display HTML	<input type="text" value="Insurance"/>									
<input type="button" value="Add"/>		<table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td><a href="#">Consultant</a></td> </tr> <tr> <td><a href="#">Corporate Actions</a></td> </tr> <tr> <td><a href="#">General</a></td> </tr> <tr> <td><a href="#">Institutional</a></td> </tr> <tr> <td><a href="#">International</a></td> </tr> <tr> <td><a href="#">PCC</a></td> </tr> <tr> <td><a href="#">Strategic Alliance</a></td> </tr> </tbody> </table>	Name	<a href="#">Consultant</a>	<a href="#">Corporate Actions</a>	<a href="#">General</a>	<a href="#">Institutional</a>	<a href="#">International</a>	<a href="#">PCC</a>	<a href="#">Strategic Alliance</a>
Name										
<a href="#">Consultant</a>										
<a href="#">Corporate Actions</a>										
<a href="#">General</a>										
<a href="#">Institutional</a>										
<a href="#">International</a>										
<a href="#">PCC</a>										
<a href="#">Strategic Alliance</a>										

Figure 65: Manage Categories Screen

2. The Categories box on the right lists all the values created for the default. Click on the value to be edited. For example, General. You see the Category Details: General screen.

Figure 66: Category Details Screen

3. To edit category details, go to the Edit Category Information box.

Modify any of the fields as given in the table below:

Short Name: Enter a short name for the category.
Full Name: Enter the entire name of the category.
Full Plural Name: Enter the plural of the name.
Display HTML: Enter the HTML format of the name.

4. After you make all the changes, click **Save Changes**.

### Other Tasks done from the Category Details Screen

Besides the edits mentioned, you can also do the following:

5. To	6. Do
7. Set the scope of the category value in the Category Scopes box  8. Items in the Associated With column are related to the category	9. Click on an item name in the Associated With column to move the item to the Not Associated With column.  10. Similarly, click on an item in the Not Associated With column to move it to the Associated With column.
11. Delete a category	12. Click the name of the category you wish to delete in the Manage Categories screen (See Figure 65). You will now see the Category Details screen.  13. Click <b>Delete</b> in the Delete Category box. This deletes the category from all X RMS

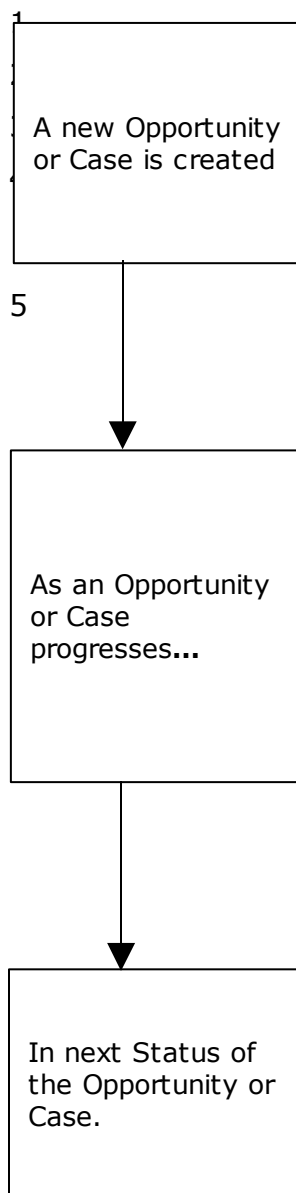
	screens.
--	----------

## 6 Workflow

Workflow is currently applicable to the Opportunities and Cases features of XRMS. It will eventually apply to the Campaigns feature.

Activity Templates are used to define workflow using Types and Statuses, see Section 4.2 for more details on these templates. An Activity Template is used to create a new activity when the status or type of a case or opportunity changes. Every activity in the Activity Template is assigned to a user with the same role as that defined for the activity in the Activity Template. When numerous users have the same role, the sequence of activity assignment starts from those users with the same role that have the least number of open activities.

The concept of workflow can be represented as follows:



Each Opportunity or Case has a "Type".

Each Opportunity Type and Case Type has a "Status".

Each Opportunity Status or Case Status has Workflow Activity Templates.

Activity Templates define the standard activities associated with each status.

6

7

8

New Activities are created from the activity templates and assigned based on the Role defined in the activity template.

When the said new activities are completed, further new activities are created from the activity templates and assigned based on the role defined in the activity template.

This cycle of creating new activities from templates, and assigning activities based on roles in the activity template continues until all the activities under a specific status are completed.

The case or opportunity now moves to the next status.

9

12

The process of creating new activities from activity templates and assigning them based on roles in the activity template, repeats for the activities in this status.

## 7 Plugins

Plugins are a convenient means of linking to a specific application. Plugins can be activated in the XRMS Administration panel and some plugins require that other programs or components be installed.

Click on the **Plugin Activation** link in the Plugin box of the Administration screen (See Figure 1). You see the Plugin Administration screen.



**Plugins**

apb	<input type="checkbox"/>
autostatus	<input checked="" type="checkbox"/>
censusfactsheet	<input type="checkbox"/>
cti	<input type="checkbox"/>
demo	<input type="checkbox"/>
googlenews	<input type="checkbox"/>
idphoto	<input type="checkbox"/>
info	<input type="checkbox"/>
journal	<input checked="" type="checkbox"/>
mapquest	<input type="checkbox"/>
mrtg	<input type="checkbox"/>
opportunitynotes	<input type="checkbox"/>
owl	<input type="checkbox"/>
phone	<input type="checkbox"/>
radtest	<input type="checkbox"/>
serverinfo	<input type="checkbox"/>
sitewx	<input type="checkbox"/>
tavi	<input type="checkbox"/>
useradmin	<input type="checkbox"/>
vcard	<input type="checkbox"/>
voicemail	<input checked="" type="checkbox"/>
webcalendar	<input checked="" type="checkbox"/>
webform	<input type="checkbox"/>
weblinks	<input type="checkbox"/>
whereis	<input type="checkbox"/>

Figure 67: Plugin Administration Screen

Plugins and related information about them are in the table that follows:

Plugin Name	Activation	Description
Apb	Requires installation of apb.	Active PHP Bookmarks enable users to bookmark websites and share these bookmarks.
Cti	Installation required.	Connection to the Asterisk Open Source PBX <a href="http://www.asterisk.org/">http://www.asterisk.org/</a> voicemail system.
Demo	Administration Panel and addition of a webpage demo.php.	Link to a demo page within XRMS. The demo page would have to be provided.
Dunfinder	Installation required.	Dial-Up Number Finder for the US.
Idphoto		
Info	Installation required.	Additional values to track characteristics of computers.
Mapquest	Administration Panel only.	Passes address to mapquest.com to do an address lookup. Both whereis and mapquest cannot be activated at the same time.
Mrtg	Installation required.	Multi Router Traffic Grapher.
opportunitynotes	Administration Panel only.	Add notes to an Opportunity.
Phone	Administration Panel.	Searches for phone numbers in Company or Contact.
Tavi		
Useradmin	Administration Panel only.	Selecting this plugin is NOT RECOMMENDED.
Vcard	Administration Panel only.	Creates a vcard of the Contact
webcalendar	Requires	Link to webcalendar- webcalendar is a

Plugin Name	Activation	Description
	installation of webcalendar.	shared calendar application.
Webform	Installation required.	Creates a webform on your external website.
Weblinks		
Whereis	Administration Panel only.	Passes address to whereis.com.au (Australia) to do an address lookup.  Both whereis and mapquest cannot be activated at the same time.

## 7.1 Manage Info Types **[[This link is not seen in the current version ?]]**

There are different types of information that need to be maintained to ensure that the XRMS application runs according to user specifications. Administrators can add, edit, and delete fields that need to appear in different screens as well as specify where these fields should be displayed within a given screen.

### 7.1.1 Add an Info type

To add an info type, do the following:

1. Navigate to Administration>Plugins and click the **Manage Info Types** link to reach the Manage Info Types screen.

Add New Info Type		Info Type	Display On
Name	<input type="text" value="Quarterly Revenue"/>	<a href="#">Contact Custom Fields</a>	contact_sidebar_top
Display On	<input type="text" value="Company Sidebar Bottom"/>	<a href="#">Company Custom Fields</a>	company_sidebar_bottom
<input type="button" value="Add"/>			

*Figure 68: Manage Info Types*

2. In the Add New Info Type box, enter the fields as given in the table below:

Name: Enter the name of the new info type.

Display On: Choose the position of display of this info type to the user from the drop-down list.

3. Click **Add** to see the new info type added to the list of Info Types on the left side in the Manage Info Types screen.

### 7.1.2 Editing and Deleting Info Types

To edit an info type, follow the steps below:

1. Navigate to Administration>Plugins and click the **Manage Info Types** link to reach the Manage Info Types screen, see Figure 68.
2. From the list of info types on the left side of the screen, click the name of the info type that you want to edit. You see the Edit Info Type Information screen.

Edit Info Type Information	
Name	<input type="text" value="Quarterly Revenue"/>
Display On	<input type="text" value="Company Sidebar Bottom"/> ▼
<input type="button" value="Save Changes"/>	
Delete Info Type	
Click the button below to permanently remove this item.	
Note: This action CANNOT be undone!	
<input type="button" value="Delete"/>	

Figure 69: Info Type Details

3. To make changes, go to the Edit Info Type Information box. All the fields are explained in Manage Info Types screen, see Figure 68.
4. After you edit the fields, click **Save Changes**.

### To delete an info type

Navigate to the Administration>Manage Info Types link to reach the Manage Info Types screen, see Figure 68.

From the list of info types on the left side of the Manage Info Types screen, click the name of the info type that you want to edit. You see the Info Type Details: < Info type> screen, see Figure 69.

In the Delete Info Type box, click **Delete** to remove the info type.

## Appendix 1–List of Country Codes

Country	Code	Country	Code
	1	Cayman Islands	41
Afghanistan	2	Central African Republic	42
Albania	3	Chad	43
Algeria	4	Chile	44
American Samoa	5	China	45
Andorra	6	Christmas Island	46
Angola	7	Cocos (Keeling) Islands	47
Anguilla	8	Colombia	48
Antarctica	9	Comoros	49
Antigua and Barbuda	10	Congo	50
Argentina	11	Cook Islands	51
Armenia	12	Costa Rica	52
Aruba	13	Croatia	53
Australia	14	Cuba	54
Austria	15	Cyprus	55
Azerbaijan	16	Czech Republic	56
Bahamas	17	Democratic People's Republic of Korea	57
Bahrain	18	Democratic Republic of the Congo	58
Bangladesh	19	Denmark	59
Barbados	20	Djibouti	60
Belarus	21	Dominica	61
Belgium	22	Dominican Republic	62
Belize	23	Ecuador	63
Benin	24	Egypt	64
Bermuda	25	El Salvador	65
Bhutan	26	Equatorial Guinea	66
Bolivia	27	Eritrea	67
Bosnia and Herzegovina	28	Estonia	68
Botswana	29	Ethiopia	69
Brazil	30	Faeroe Islands	70
British Virgin Islands	31	Falkland Islands (Malvinas)	71
Brunei Darussalam	32	Federated States of Micronesia	72
Bulgaria	33	Fiji	73
Burkina Faso	34	Finland	74
Burundi	35	France	75
??	36	France, metropolitan	76
Cambodia	37	French Guiana	77
Cameroon	38	French Polynesia	78
Canada	39	Gabon	79
Cape Verde	40	Gambia	80
Georgia	81	Lesotho	118

<b>Country</b>	<b>Code</b>	<b>Country</b>	<b>Code</b>
Germany	82	Liberia	119
Ghana	83	Libyan Arab Jamahiriya	120
Gibraltar	84	Liechtenstein	121
Greece	85	Lithuania	122
Greenland	86	Luxembourg	123
Grenada	87	Macau	124
Guadeloupe	88	Madagascar	125
Guam	89	Malawi	126
Guatemala	90	Malaysia	127
Guinea	91	Maldives	128
Guinea-Bissau	92	Mali	129
Guyana	93	Malta	130
Haiti	94	Marshall Islands	131
Holy See	95	Martinique	132
Honduras	96	Mauritania	133
Hong Kong Special Administrative Region of China	97	Mauritius	134
Hungary	98	Mayotte	135
Iceland	99	Mexico	136
India	100	Monaco	137
Indonesia	101	Mongolia	138
Iran	102	Montserrat	139
Iraq	103	Morocco	140
Ireland	104	Mozambique	141
Israel	105	Myanmar	142
Italy	106	Namibia	143
Jamaica	107	Nauru	144
Japan	108	Nepal	145
Jordan	109	Netherlands	146
Kazakhstan	110	Netherlands Antilles	147
Kenya	111	New Caledonia	148
Kiribati	112	New Zealand	149
Kuwait	113	Slovakia	187
Kyrgyzstan	114	Slovenia	188
Lao People's Democratic Republic	115	Solomon Islands	189
Latvia	116	Somalia	190
Lebanon	117	South Africa	191
Nicaragua	150	Spain	192
Niger	151	Sri Lanka	193
Nigeria	152	Sao Tome and Principe	194
Niue	153	Sudan	195
Norfolk Island	154	Suriname	196
Northern Mariana Islands	155	Swaziland	197
Norway	156	Sweden	198
Oman	157	Switzerland	199
Pakistan	158	Syrian Arab Republic	200
Palau	159	Taiwan	201
Panama	160	Tajikistan	202
Papua New Guinea	161	Thailand	203
Paraguay	162	The Former Yugoslav Republic of	204

Country	Code	Country	Code
		Macedonia	
Peru	163	Togo	205
Philippines	164	Tonga	206
Poland	165	Trinidad and Tobago	207
Portugal	166	Tunisia	208
Puerto Rico	167	Turkey	209
Qatar	168	Turkmenistan	210
Republic of Korea	169	Turks and Caicos Islands	211
Republic of Moldova	170	Tuvalu	212
Romania	171	Uganda	213
Russian Federation	172	Ukraine	214
Rwanda	173	United Arab Emirates	215
Reunion	174	United Kingdom	216
Saint Helena	175	United Republic of Tanzania	217
Saint Kitts and Nevis	176	United States	218
Saint Lucia	177	United States Virgin Islands	219
Saint Pierre and Miquelon	178	Uruguay	220
Saint Vincent and the Grenadines	179	Uzbekistan	221
Samoa	180	Vanuatu	222
San Marino	181	Venezuela	223
Saudi Arabia	182	Zambia	227
Senegal	183	Zimbabwe	228
Seychelles	184		
Sierra Leone	185		
Singapore	186		
Viet Nam	224		
Yemen	225		
Yugoslavia	226		



## Appendix 2–Default Import Formats

Category	Default Import	Column No.	Category	Default Import	Column No.
//company info	company_name	1	//contact info	first_name	22
	legal_name	2		last_name	23
	division_name	3		email	24
	website	4		work_phone	25
	tax_id	5		home_phone	26
	extref1	6		fax	27
	extref2	7		division	28
	extref3	8		salutation	29
	company_custom1	9		date_of_birth	30
	company_custom2	10		summary	31
	company_custom3	11		title	32
	company_custom4	12		description	33
	employees	13		cell_phone	34
	revenue	14		aol	35
	credit_limit	15		yahoo	36
	terms	16		msn	37
	company_profile	17		interests	38
	company_code	18		contact_custom1	39
	phone	19		contact_custom2	40
	phone2	20		contact_custom3	41
	fax	21		contact_custom4	42
			//address info	contact_profile	43
				gender	44
				address_name	45
				line1	46
				line2	47
				city	48
				state	49
				postal_code	50
				country	51
				address_body	52
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## **Questions/Comments**

**Section 3.3 [Export Companies/Contacts as LDAP/LDIF] and 3.4 [Export Companies with address and phone info]** - What do we need to explain here??? When we click these options, we get the message *Unable to Open File for Writing*.

**Section 4.1.5 [Manage Users in a Group] and Section 4.1.6 [Manage Groups within a Group]** - There is some display error with the screens - Figure 13:Manage Group Users and Figure 14:Manage Group Groups respectively. The screens mention the number of records found but do not display this list of records. Hence we are unable to make the updates to these sections.

**Section 4.6 System Preferences** - The screen Figure 34:System Preferences has a display error - some drop-down lists are not displayed. Also, the sections under 4.6 have been highlighted in yellow, as the functioning is no longer the same.

**Section 7.1 Manage Info Types** - This link is not seen in the current XRMS version.