sage software

SageCRM

SageCRM 6.1

Advanced Customization Wizard Guide

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Chapter 1
Introduction

This guide is for the CRM System Administrator.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac and Softline Accpac CRM.

What is the Advanced Customization Wizard?

The Advanced Customization Wizard provides a quick and easy method for creating custom main entities in Sage CRM. The Advanced Customization Wizard functionality works in conjunction with the Component Manager. Creating a new custom entity involves using the Component Manager to install the Advanced Customization Wizard component. Please refer to the *System Administrator Guide* for more information on installing components and the *Developer Guide* for information on advanced Component Manager features.

When you install the Advanced Customization Wizard component, you are prompted to enter a number of parameter values. These are used to determine the entity's associations within the system. Database objects, CRM metadata, and custom CRM files are then created in order to form the entity and link it to other entities in the system.

Prerequisites

To use the Advanced Customization Wizard, you need:

- To ensure that your system includes the Extensibility Module.
- The Advanced Customization Wizard ZIP file—this contains Advanced Customization Wizard component files, custom pages, and image files.
- An understanding of the Component Manager functionality to install the Advanced Customization Wizard component. Please refer to the *System Administrator Guide* for information on installing components.

Preparation Tasks

Before you can begin using the Advanced Customization Wizard you need to:

- Copy the Advanced Customization Wizard ZIP file to a location where you can easily access it.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Creating a New Entity	Gives a step-by-step account of how to create a new entity and provides an example.
Customizing New Entities	Shows how to customize new entities you created with the wizard.

Chapter 2
Creating a New Entity

In this chapter you will learn about:

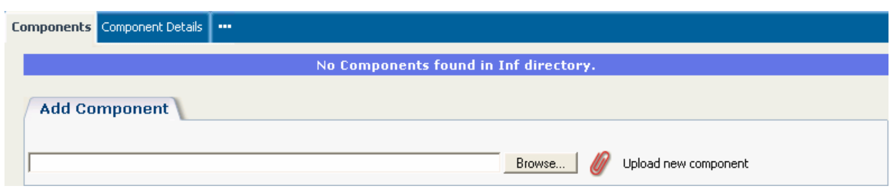
- Creating a new main entity.
- Creating a new entity called Project.
- The custom pages and metadata generated when the entity is created.

Creating a New Main Entity

To create a new main entity:

1. Select Administration | Customization | Component Manager.

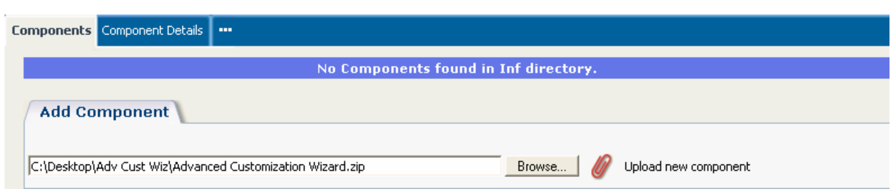
   The Components tab is displayed. If there are any components available to install, they are displayed in the Available Components list. If not, a message is displayed to inform you that there are no components in the INF directory—this is the directory on the server where components are stored. In addition, a panel called Add Component is displayed.

   Components tab

2. Select the Browse button and navigate to the location where you saved the Advanced Customization Wizard ZIP file.
3. Select the file and select Open from the Windows dialog box.

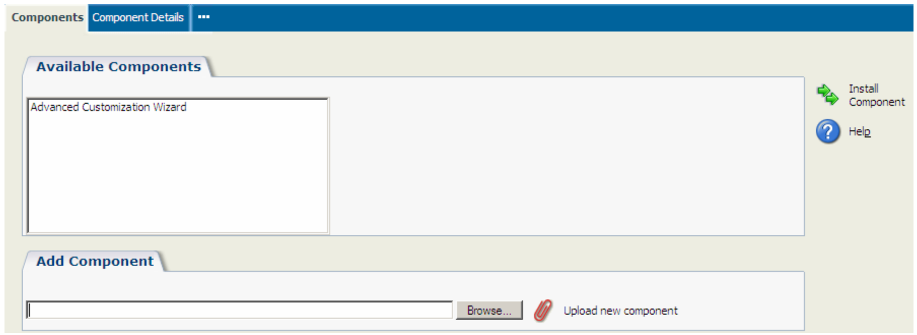
   The path to the file is displayed on the Add Component panel.

   Components tab

4. Select the Upload New Component button.

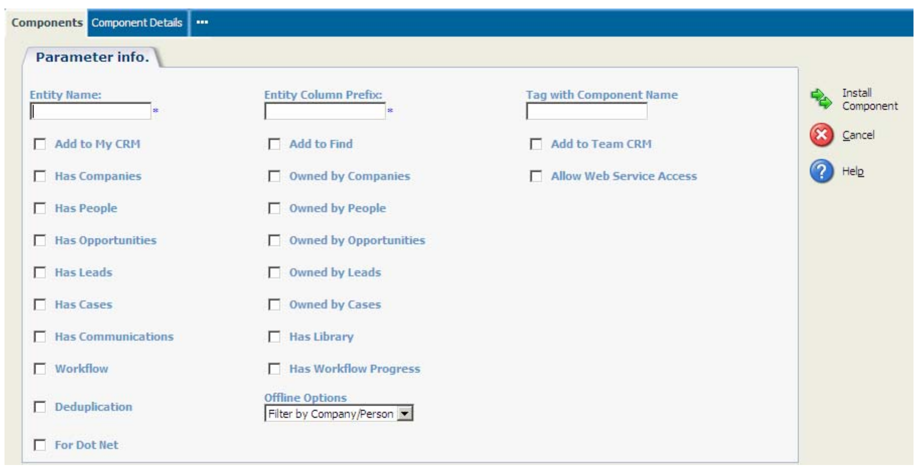
When you do this, the component becomes available on the Available Components list. In the background, the Advanced Customization Wizard ZIP file is unzipped and uploaded to the INF directory on the server. If an INF directory doesn't already exist, it is created at this point.



Available Components List

5. Select the component and click on the Install Component button.

   The Parameter Info screen is displayed, with a number of fields that you complete or select in order to name the new entity and create associations between it and the system.



Parameter Info screen

6. Complete the fields on the Parameter Info screen. Please refer to the table at the end of the chapter for a detailed description of each field.

7. Select the Install Component button.

   Progress messages are displayed, and the Continue button becomes available when the new entity is fully created. The following are created as standard:

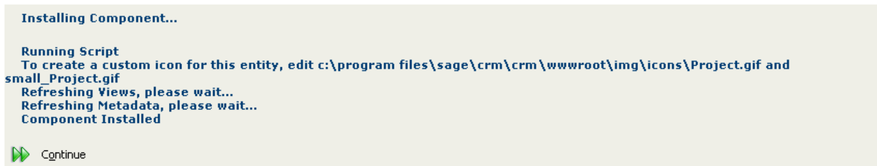
   – Name and status fields.

   – Search, entry, summary and top content screens.

– A grid for the new entity.

– A tab group with a tab that that runs a custom summary screen.

Other screen elements created depend on the parameters you specified in Step 6. Refer to the table below for more details.

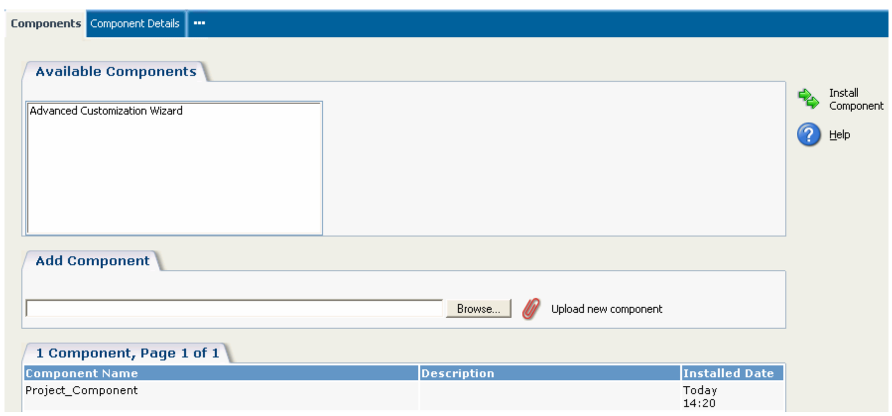


Installing Component progress information

8. Select the Continue button.

   You are returned to the Components tab. The Advanced Customization Wizard component is listed in the Installed Components panel on this tab.

   Note: The Advanced Customization Wizard component also remains listed on the Available Components list at the top of the screen. This enables you to create as many new entities as you require by selecting the component and following the installation steps above.



Components page

You can now view the new entity you created, and you can customize it. Please refer to "Chapter 3: Customizing New Entities" for more information.

The following Table describes the fields on the Parameter Info screen.

Field	Description
Entity Name	Enter the name of the new entity. This is the name of the database table for the entity, as well as the caption for the entity that will be used throughout CRM to identify it. The name must be less than 27 characters in length and must not be the same name as an existing table in the CRM database.
Entity Column Prefix	Enter the letter string to be used as a prefix to the names of the columns in the new entity's database table. The column prefix must be four characters in length. There is no need to include an underscore. The prefix must follow the particular server's rules for identifiers. For example, when working on an SQL Server, the prefix must follow SQL Server's identifier rules.
Tag With Component Name	This allows you to script out and further customize new entities that you create. Once you type an entity name in the Entity Name field, the value in the Tag With Component Name field is set to <EntityName>_Component and a new component (with the same name) is added to your list of Existing Components. Having created a new entity, you can select the new component from the Existing Components list and: ▪ Click on the Preview Script button to view all of the changes involved in creating the new entity.

Field	Description
	▪ Set <EntityName>_Component as the currently recording component and then make further customizations to the entity you created. ▪ Script out the entire customization (entity creation and further customizations). Refer to the *Developer Guide* for more information on scripting out components.
Add To My CRM	Select this checkbox to create a custom list and a custom tab for the My CRM work area. This enables you to view a list of all the new entity records that are associated with a particular user.
Add To Find	Select this checkbox to create a custom search entry screen and a corresponding search results list. These allow the new entity's records to be searched for using the Find functionality in CRM.
Add To Team CRM	Select this checkbox to create a custom list, an asp page that displays the list, and a custom tab for the Team CRM work area. This enables you to view a list of all new entity records associated with a particular Team.

Field	Description
Has Companies	Select this checkbox to create a company tab and to add a corresponding custom company list to the tab group. This enables you to view a list of associated companies for all new entity records. It also enables you to link existing companies to the new entity via a Link button. If you want to set up deduplication for companies in this scenario, refer to "Enabling Company and Person Deduplication from within the New Entity" below
Has Accounts	Displayed only if Integration is set up. Select this checkbox to create an account tab and to add a corresponding custom account list to the tab group. This enables you to view a list of associated accounts for all new entity records. It also enables you to link existing accounts to the new entity via a Link button.
Has People	Select this checkbox to create a people tab and to add a corresponding custom people list to the tab group. This enables you to view a list of all associated people for all new entity records. It also enables you to link existing people to the new entity via a Link button. If you want to set up deduplication for people in this scenario, refer to "Enabling Company and Person Deduplication from within the New Entity" below.

Field	Description
Has Opportunities	Select this checkbox to create an opportunities tab and to add a corresponding custom opportunities list to the tab group. This allows you to see all the associated opportunities for all new entity records.
Has Leads	Select this checkbox to create a lead tab and to add a corresponding custom leads list to the tab group. This allows you to view all the associated leads for all new entity records.
Has Cases	Select this checkbox to create a cases tab and to add a corresponding custom cases list to the tab group. This allows you to view associated cases for all new entity records.
Has Communications	Select this checkbox to create a communications tab and to add a corresponding custom communications list to the tab group. This allows you to view associated communications for all entity records.
Workflow	Select this checkbox to create a workflow for the custom entity. Selecting the checkbox also enables default workflow rules for the new entity.
Deduplication	Selecting this checkbox creates a deduplication screen for the new entity. Deduplication rules can then be set up in CRM. If the new entity "Has People" or "Has Companies" and you want to set up deduplication screens for them, you need to refer to "Enabling Company and Person Deduplication from within the New Entity" below.

Field	Description
For Dot Net	Selecting this checkbox creates an entity for which you can write a .Net module instead of using ASP pages. The entity is created with metadata in the usual way but as ASP pages are not created, you need to use the .NET DLL to customize the entity.
Has Library	Selecting this checkbox creates a library tab and adds a corresponding custom library list to the tab group. This enables you to view all associated library entries for all new entity records.
Has Workflow Progress	Selecting this checkbox creates a progress table for the custom entity table. It also provides the ability to add progress notes for custom entity records.
Owned By Companies	Selecting this checkbox adds a custom tab to the Company tab group that displays a list of all the associated new entity records for a particular company.
Owned By Accounts	Displayed only if Integration is set up. Selecting this checkbox adds a custom tab to the Account tab group that displays a list of all the associated new entity records for a particular account.
Owned By Orders	Displayed only if Integration is set up. Selecting this checkbox adds a custom tab to the Orders tab group that displays a list of all the associated new entity records for a particular order.

Field	Description
Owned By Quotes	Displayed only if Integration is set up. Selecting this checkbox adds a custom tab to the Quotes tab group that displays a list of all the associated new entity records for a particular quote.
Owned By People	Selecting this checkbox adds a custom tab to the People tab group that displays a list of all the associated new entity records for a person.
Owned By Opportunities	Selecting this checkbox adds a custom tab to the Opportunities tab group that displays a list of all the associated new entity records for an opportunity.
Owned By Leads	Selecting this tab adds a custom tab to the Leads tab group that displays a list of all the associated new entity records for a lead.
Owned By Cases	Selecting this checkbox adds a custom tab to the Cases tab group that displays a list of associated new entity records for a case.
Allow Web Service Access	Selecting this checkbox ensures that the new entity is enabled for web services.
Offline Options	Displayed only if you have the Solo module. Select an option from the drop-down list to determine how and if new entity records will be handled by the Solo Client and what filter options will be made available to Solo Clients for the new entity.

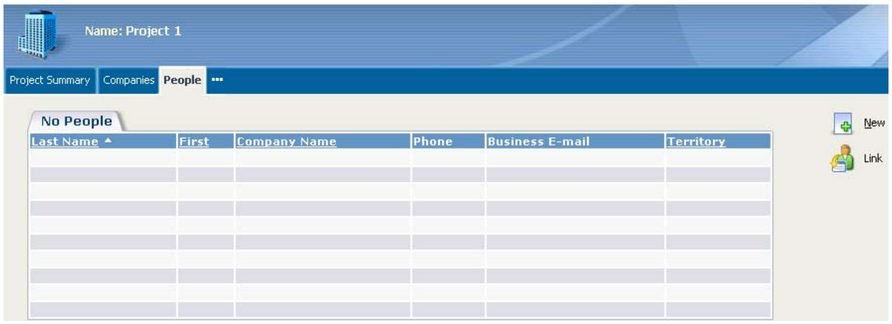
Enabling Company and Person Deduplication from within the New Entity

If the entity you created "has companies" or "has people", and you want a Deduplication page to be displayed when you create a Company or Person from within the context of the new entity, you need to edit the <ENTITYNAME>COMPANY.ASP page or the <ENTITYNAME>PERSON.ASP page.

To enable deduplication if the entity "has" Companies, open the <ENTITYNAME>COMPANY.ASP and change the action from 140 to 1200.

Alternatively, to enable deduplication if the entity "has" People, open the <ENTITYNAME>PERSON.ASP and change the action from 141 to 1201.

For example, let's say you created a new company that "has" People. You want the Person deduplication page to be displayed when you create a new Person from within the Project context.



Project Context | Person tab

To do enable deduplication:

1. Change the script in the <ENTITYNAME>PERSON.ASP from:

```
eWare.URL(141)+"&Key-
1="+iKey_CustomEntity+"&PrevCustomURL="+List.prevURL+"&E=
Accounts", 'Person', 'insert'));
```

   To:

```
eWare.URL(1201)+"&Key-
1="+iKey_CustomEntity+"&PrevCustomURL="+List.prevURL+"&E=
Accounts", 'Person', 'insert'));
```

2. Save the file.

   When you select the New action button to create a new Person within a Project record, the Person Deduplication page is displayed.

Example: Creating a New Entity called Project

Let's say you want to create a new entity with the following features:

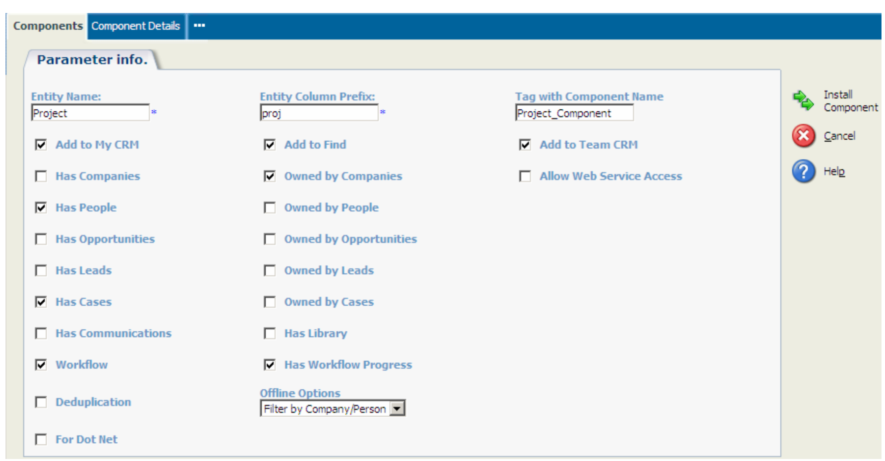
- The entity name is Project.
- The column prefix for the new entity is "proj".
- The new Project entity is owned by the Company entity.
- It can have People and Cases associated with it.
- It is available as a tab in the My CRM and Team CRM work areas.
- Individual Projects can be found by selecting the Find menu button.
- Workflow and Workflow Progress screens are available for Projects.

To create the new entity:

1. Select the Components tab.
2. Highlight the Main Entity Wizard component from the Available Components list, and select the Install Component button.

Available Components list

3. When the Parameter Info screen is displayed, complete the fields as follows:



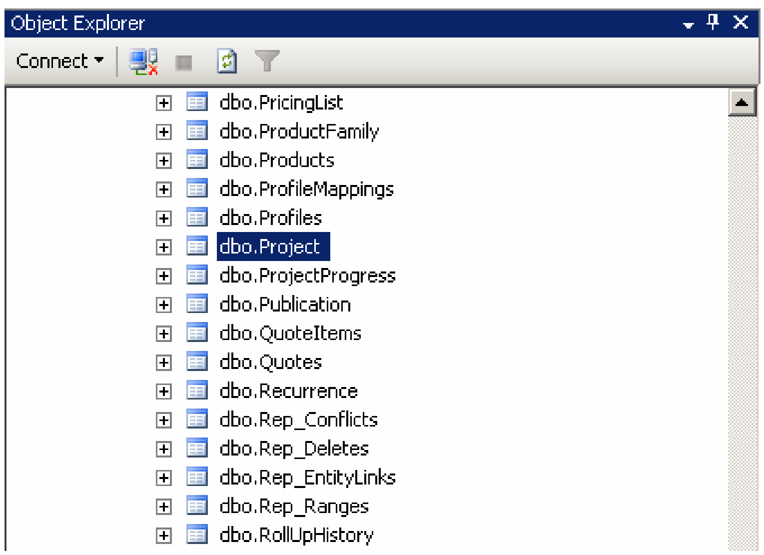
Parameter Info screen

In the Entity Name field, you add the name of the custom entity, in this case **Project**. The Tag With Component Name field automatically displays the entity name with the "_Component" suffix appended. In this example, the field displays "Project_Component." In the Entity Column, enter the name of the prefix that will be used to identify fields in CRM. For example, the Project entity will probably feature information about a project manager, the name of whom could be stored in a field called "proj_manager." Note: as previously explained, the system adds the required underscore ("_") character by default, so the admin should enter only the prefix name. In this instance, type **proj**.

4. Select the Install Component button.

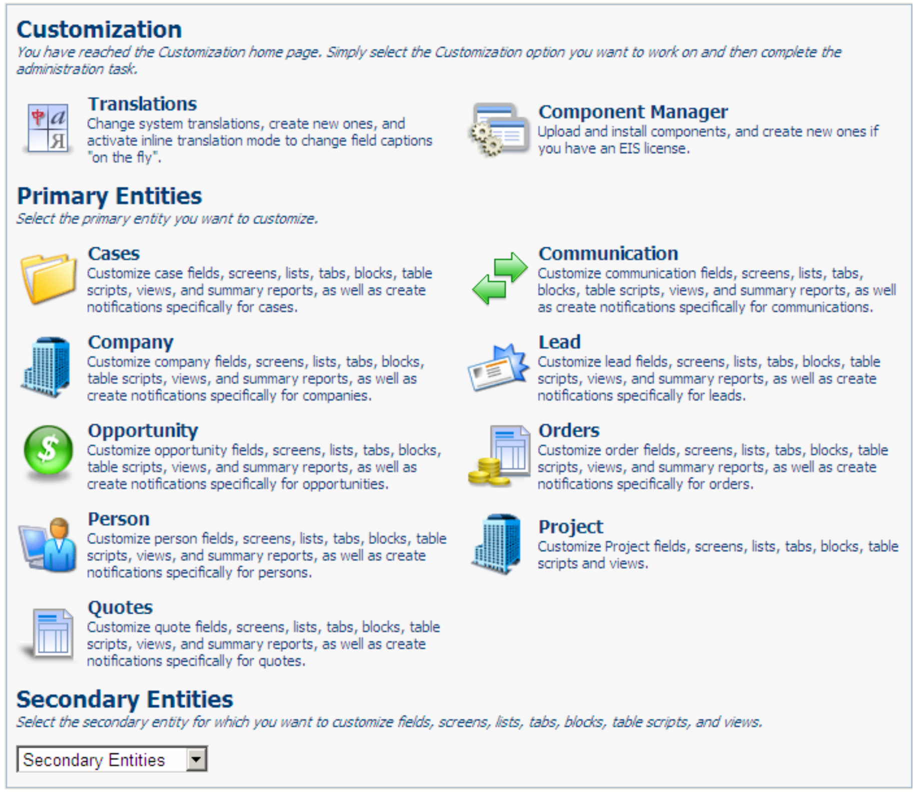
5. When the component is installed and the new entity is created, you can see how your selections on the Parameter Info screen translate to CRM by taking a look at the following areas in CRM and the CRM database—specific custom files and meta data created are discussed in the next section:

   – The entity name is Project—a new database table called Project is created.



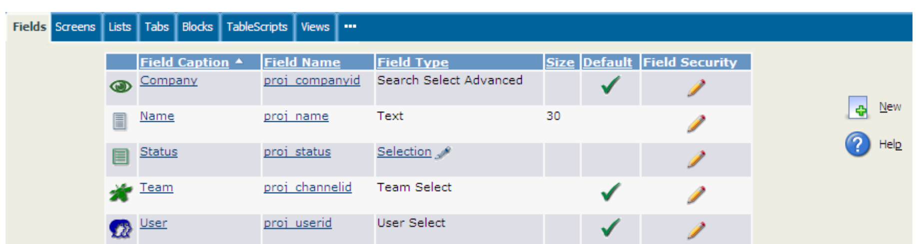
New Project table

   – The new entity (Project) becomes available from the Customization home page.



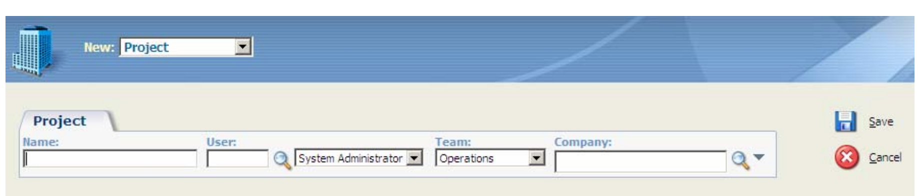
Customization home page

– The column prefix for the new entity is "proj". The standard fields created for the new entity are prefixed with "proj_".



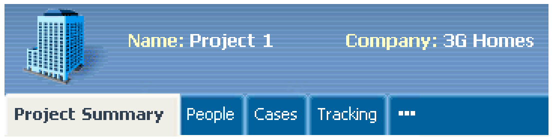
Standard Project fields

– The new Project entity is owned by the Company entity. Each new Project you create must be associated with a company.



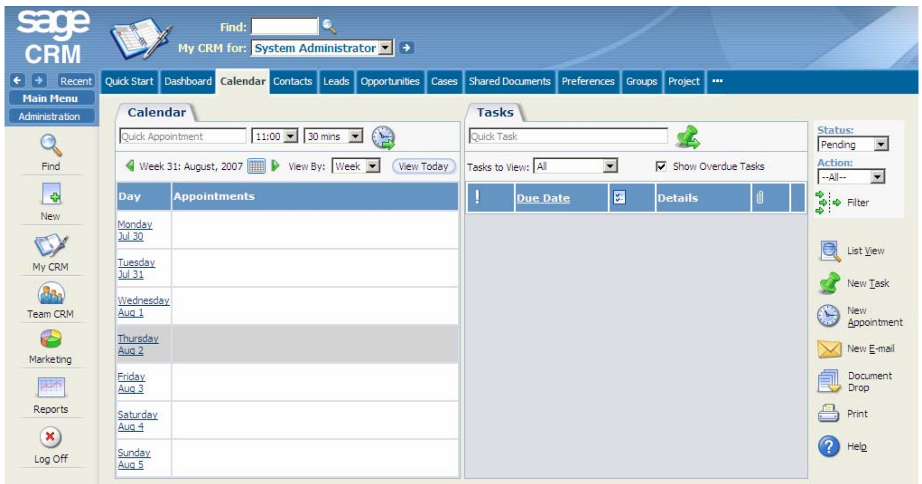
New Project screen

– A Project record can have People and Cases associated with it.



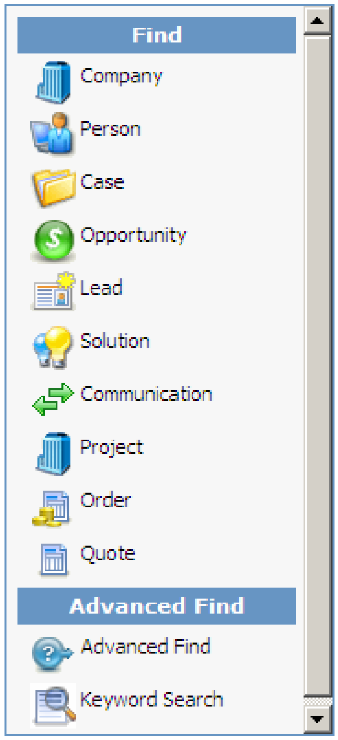
Project tabs

– The new entity is available as a tab on the My CRM and Team CRM work areas.



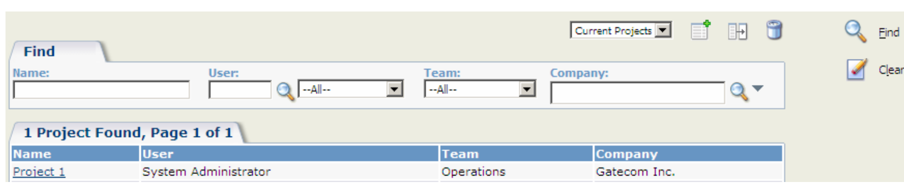
My CRM tabs

– Individual Project records can be searched for using the Find main menu option.



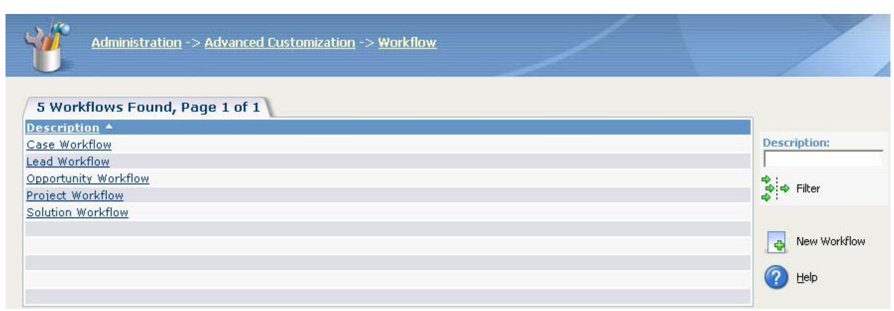
Find pop-out menu

– You can create a Saved Search for projects.



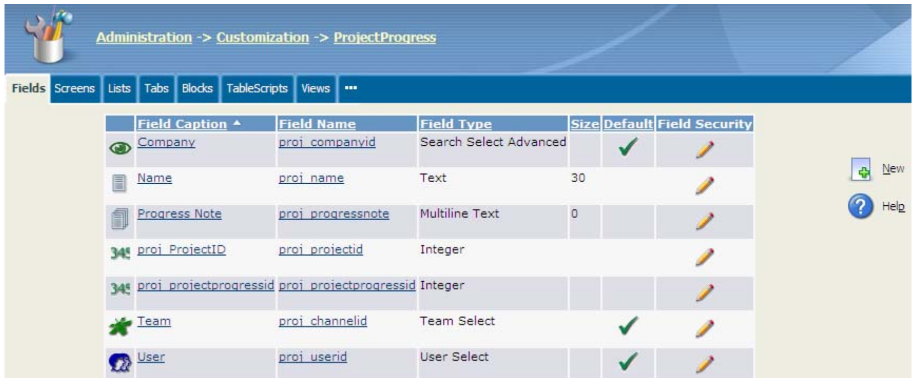
Project Saved Search

– Workflow is available for Projects.



Workflow list

– A Project Progress secondary entity is created.



Project Progress

Making Custom Entities Available for Reassignment

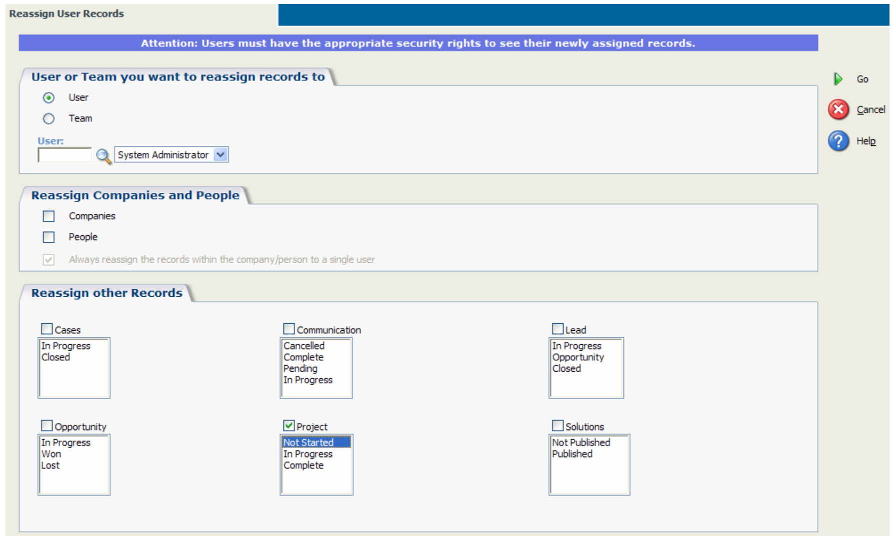
Administrators and info managers can reassign entity records associated with one user to another user or team of users.

To access the screen for reassigning user records:

1. Select Administration | Users | Users.
2. Use the Find screen to locate a user and click on that user's name.

   The User Details page displays. There are three buttons available for disabling users and reassigning their records: Reassign; Reassign and Disable; and Disable.
3. Click on the Reassign button.

   The Reassign User Records page is displayed. You can see that it is also possible to reassign records from the new custom entity, Project. In addition, you can filter which records to reassign by selecting them according to their status. In this example, only projects that have their status flagged to "Not Started" will be reassigned.

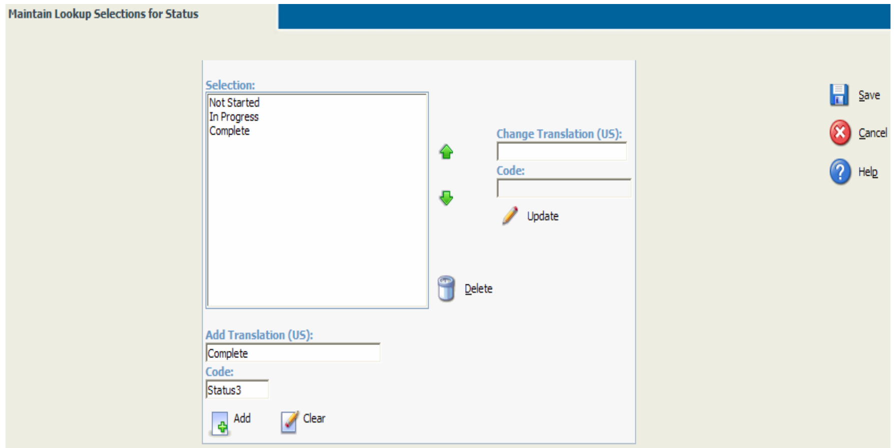


The Reassign User Records page with Project records selected

After you create a custom entity, it will appear automatically in the Reassign User Records page. In addition, the field used as a filter, Status ("proj_status"), is added by default to the new table. The only task facing the administrator is to add the necessary options to the Status selection field. In this example, they are "Not Started," "In Progress," and "Complete."

To specify options for the custom entity's Status field:

1. Select Administration | Customization | <EntityName>. In this case, click on the name of the Project entity.
2. Select the Fields tab if it is not already open.
3. In the row for Status, click on the hyperlink indicating the field's type, Selection. The Maintain Lookup Selection for Status page is displayed.
4. Enter the appropriate values in the Add Translation and Code fields and click on the Add button. In this instance, you would specify the third option to appear in the down-down list (and in the list appearing on Reassign record pages) by typing **Complete** into the Add Translation field and entering **Status_3** as a code. For more information, refer to the chapter "Field Customization" in the *System Administrator Guide*.



Add options to the Status selection field

Custom Files and Metadata

Custom Files

A number of custom files are generated for the new entity depending on the selections you made on the Parameter info screen when you were creating it. The custom pages are stored automatically in:

…Program Files\Sage\CRM\<installname>\WWWRoot\CustomPages\<Entity Name>

The table below lists all possible custom files that can be created and gives a description of each.

File Name	Description
<Company><EntityName>.asp	This page displays the list of all new entity records owned by a particular entity e.g. company (if Owned By Companies was selected on the Parameter Info screen). A similar file can be generated for: People Leads Opportunities Cases Accounts Quotes Orders
<EntityName><Person>.asp	This page lists all of the new entity's people (if Has People was checked). Depending on your selections, a similar file can be created for: Communications Case Lead Opportunity Company Library Accounts

File Name	Description
<EntityName>Channel.asp	This page displays the list of all of the new entity records associated with a Team. The list is displayed on the Team CRM area (if Add To Team CRM was selected on the Parameter Info screen.
<EntityName>Summary.asp	The summary page for new entity records.
<EntityName>Find.asp	This page allows you to search for the new entity records (if Add To Find was selected on the Parameter Info screen).
<EntityName>ToDo.asp	This page displays the list of all the new entity records associated with a user. The list is displayed on the My CRM area (if Add To My CRM was selected on the Parameter Info Screen).
<EntityName>Dedupe.asp	This page displays the custom dedupe screen if Deduplication was selected on the Parameter Info screen. If not, it redirects you to the <EntityName>New.asp
<EntityName>Conflict.asp	This page lists all of the conflicts that your dedupe entrygroup found.
<EntityName>Library.asp	Enables library items to be linked to the new entity.
<EntityName><Company>Link. asp	Enables you to create links between the entity records and other companies or people.
<EntityName>New.asp	This page allows you to create new entity records.
<EntityName>WF.asp	This page allows you to create a Workflow for the new entity.
<EntityName>ProgressList.asp	Enables you to progress the new entity record.

Metadata

The following metadata may be created in CRM, depending on the selections you made on the Parameter Info screen.

You can view these in Enterprise Manager, for example, in the Custom_Tables table, and you can view them in CRM via Administration | Customization. The table below lists the metadata that is created.

Metadata	Description
<entityname>SearchBox	The entry screen used for search selects and finds on new entities.
<entityname>NewEntry	The entry screen used to create new entity records.
<entityname>BoxDedupe	The deduplication screen for the custom entity (if Deduplication is selected on the Parameter Info screen).
<entityname>TopContent	The context area for the new entity records.
<entityname>SummaryScreen	The summary screen for new entity records.
<entityname>SearchBox	The search screen for finding new entity records.
<entityname>Grid	The grid used for search selects and finds on new entity records.
<entityname>UsersGrid	The grid used to list new entity records for a particular User.
<entityname>ChannelGrid	The grid used to list new entity records for a particular Team.
MainEntity<entityname>Grid	The grid used to list new entity records for a particular main entity (if Owned By <MainEntity>, is selected on the Parameter Info screen).
<entityname>	The tab group for the new entity.

Now you can...

- Create a new main entity.
- Create a new entity called Project.
- Discuss the custom pages and metadata generated when the entity is created.

Chapter 3
Customizing New Entities

In this chapter you will learn about:

- Customizing the new entity.
- Changing the new entity logo.
- Adding a report view to an entity.

Customizing a New Entity

You can customize screens, fields, lists, and tabs created by the Advanced Customization Wizard in the same way as you customize screens, fields, and lists for a default CRM entity, such as a Company, or a Person.

To customize a new entity:

1. Click on Administration | Customization.
2. Select the new entity, for example Project, from the Customization home page.
   Note: Depending on the options you chose on the Parameter Info screen an entity progress table may be available too, for example ProjectProgress. This can be customized in the same way as a typical Progress table.

   The Customize Fields tab for Project is displayed. The screen displays all the standard CRM fields that have automatically been added to the entity database table.

   New entity fields

   You can customize the new entity's Fields, Screens, Lists, Tabs, and Views in the normal way. Please refer to the *System Administrator Guide* for more information.

Changing the Entity Logos

Two images (a small one and a large one) are automatically used as the logo for all new entities you create. They are named according to the entity name you provide—<EntityName>.gif and small_<EntityName.gif>— when creating the entity, and they are copied to the following location:

…Program Files\Sage\CRM\<installname>\WWWRoot\Img\Icons

You can change the logos by overwriting the default ones if you wish.

Adding a Report View to an Entity

You can create a view to specify tables and columns from which a report can be drawn. A view can be created for any entity.

For example, you might want to create a new report view for the Project entity. This view will show cases associated with projects, who the cases were logged by, case status, case priority, and case description.

To create a new report view:

1. Select Administration | Customization | Project.

   The entity context that you select should correspond to the main database table you reference in the view.

   The Fields tab provides you with the names of the columns that can be added from the table of the entity you have selected.

   In addition to the fields shown in the interface, each table has a hidden unique identifier that is used for the SQL joins.

Table	Unique ID
Project	proj_projectid
Cases	case_caseid

   Unique table identifiers

   Each table exists in relationships and foreign keys exist to link the tables with each other.

Child Table	Foreign Key	Parent Table	Unique ID
Case	case_projectid	Project	proj_projectid

   Table relationships

2. Select the Views tab.

3. Click on the New button.

   The New Views page is displayed.

4. Type in the View Name.

   Note: Name the view starting with a single "v", with a single word, and with no spacing. For example, vProjectCaseView.

   The View Script field is automatically populated with the start of the script.

5. Select the Reports View check box.

   This makes the view available when creating a new report.

6. Type a short description of the view in the Description field.

7. Type a translation for the view in the Translation field.

   This is what the user will see on the screen when the view is selected from the drop-down list.

8. Type in the SQL for the new view.

```
CREATE VIEW vProjectCaseView
AS
SELECT proj_name, case_caseid, case_openedby, case_priority,
case_status, case_description
FROM PROJECT
INNER JOIN cases
ON proj_projectid = case_projectid
```

   SQL script for the new report view

   The columns in the SELECT statement will be the columns available in the report.

9. Select the Save button.

   The new view will now be available in the Source View drop-down list on the Report Options, Step 1 of 2 page when you are creating a new report.

Now you can...

- Customize the new entity.
- Change the new entity logo.
- Add a report view to an entity.

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