Sage Accpac CRM

sage software

Sage Accpac CRM 5.8

Self Service Guide

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Chapter 1
Introduction

This guide is for Sage CRM Implementers.

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

We assume that you have:

- Experience in carrying out CRM implementations.

- Proficiency in customizing CRM systems.

- A working knowledge of eWare blocks, HTML, creation of Active Server Pages (ASPs), Include files, cascading style sheets (CSSs), and general Web design concepts.

- Knowledge of database administration and security concepts.

What is CRM Self Service

CRM Self Service lets you create a Self Service Web site that integrates traditional corporate Web sites with Sage CRM.

With CRM Self Service, customers can log onto the Self Service Web site to perform functions, such as viewing account information, reporting problems, or requesting product information.

The extent of the customer access to corporate data or their ability to perform these functions is determined by the particular Self Service implementation. Registered and anonymous visitors can access the site, and different information can be made available to them on that basis.

The CRM Self Service application server can be run remotely from the CRM database server, via a link between Self Service and CRM.

For example, a customer care case entered via the CRM system can be viewed on the Self Service Web site. This functionality is achieved though ASP pages.
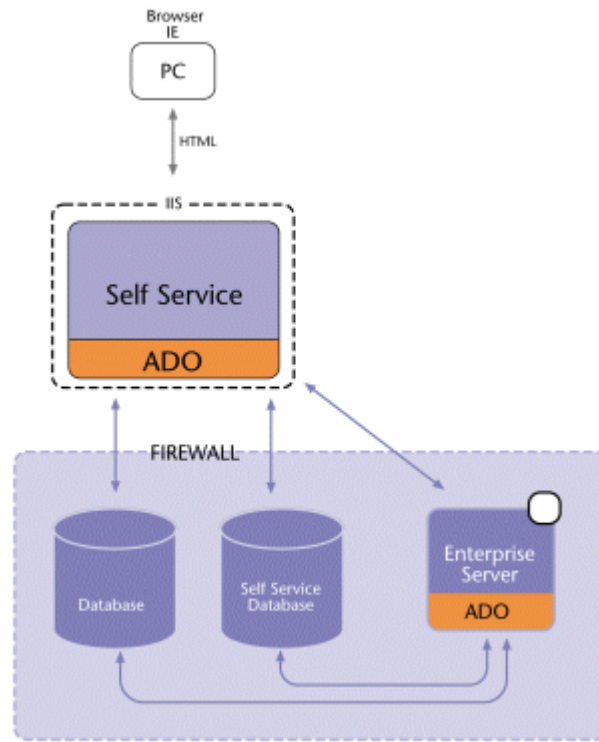
CRM Self Service Configuration

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Getting Started	An overview of prerequisites for Self Service implementations, what happens when Self Service is installed, and other requirements for installing Self Service.
The Self Service Web Site	Advice on designing a Self Service Web site.
Self Service Security	An overview of Self Service security mechanisms.
Self Service Administration in CRM	Administration tasks that need to be carried out in CRM for Self Service implementations.
Self Service Functionality	Examples of Self Service functionality.

Chapter 2
Getting Started

In this chapter you will learn about:

- Prerequisites for Self Service implementations.

- Installing Self Service.

- Requirements for setting up Self Service.

Prerequisites for Self Service Implementations

To run CRM Self Service you will need:

- CRM installed on a server with a valid Self Service license key.

- The same server software as for a typical CRM installation. Refer to the *System Administrator Guide* for more information.

- You may require the Extensibility Module, depending on the functionality you require on your Web site. Please refer to Chapter 3 "Customizing the Self Service Web Site" for more information.

Installing Self Service

During the CRM installation:

- If you have the Extensibility Module, you are asked if you want to install a demo Self Service Web site. Select the Sample Self Service Support site checkbox to install the site and use it as a template for the CRM Self Service Web site. For more information on the demo Self Service Web site, refer to the Chapter 2 "Designing the Self Service Web Site".

When you install CRM Self Service, the following takes place by default:

- A new database called CRMSelfService is created. It contains two important tables for storing visitor details—Visitor and Visitor Profile.

- A new option called Self Service becomes available on the CRM Administration | System home page. This enables you to configure CRM for Self Service and to maintain Self Service visitor information.

- A Self Service tab becomes available when you are in the Person and Company context. This allows People and Companies in CRM to be enabled

for Self Service and lets you assign a Self Service logon ID and password to them.

Setting up Self Service

Once Self Service has been installed, there are a number of tasks that need to be carried out manually before CRM Self Service is fully functional. Steps include:

- Planning your Self Service Web site.

- Reviewing Self Service security issues.

- Configuring Self Service administration settings.

These are described in more detail in the next chapters.

Now you can…

- Explain the prerequisites for Self Service implementations.

- Describe what happens when you install Self Service.

- Explain the requirements for setting up Self Service.

Chapter 3
The Self Service Web Site

In this chapter you will learn about:

- Planning a Self Service Web site.

- Understanding basic Self Service architecture.

- Creating and adding functionality to a Self Service Web site.

Planning a Self Service Web Site

To begin creating a Self Service Web site:

1. Draw up design specifications for the look and feel of the Web site, as well as for the functionality the customer requires on the site.

2. Review the corporate Web site and determine whether you can reuse any Web pages, logos, and other images. This will enable you to reflect the look and feel of the corporate Web site on your Self Service site.

   The level of functionality you can include on your Self Service Web site and the extent to which you can customize depends on whether you have the Extensibility Module. The functionality available with and without the Extensibility Module is discussed in "Customizing the Self Service Web Site" in this chapter.

3. You may want to use the demo Self Service Web site as a template to create your Web site. The demo site is created if you have the Extensibility Module, and if you selected the Sample Self Service Support Site checkbox during the CRM installation.

   The demo site is typically created in:

   > C:\Program Files\Sage\CRM\CRMSelfServiceDemo

   It contains ASP pages that reference eWare blocks, image files, and includes files (including the EWARESS.JS file). These files create the basic Self Service functionality. You will need to carry out further customization according to your implementation requirements.

Understanding Basic Self Service Architecture

Before you proceed to customize the Self Service Web site, you need to have an understanding of basic Self Service architecture.

Accessing the Site

Self Service functionality enables users to access the Self Service Web site in Registered Mode or Anonymous Mode:

- **Registered Mode.** Registered Self Service users (that is, People or Companies registered in the CRM system) can log onto the Self Service site, view relevant information, and perform functions, such as reporting a problem or requesting product information. An identifier in CRM Self Service that enables access and rights on a per user basis will authenticate them to perform functions.

- **Anonymous Mode.** Users can access the Self Service site on the Web as they would any other site. CRM technology enables a link to be created between the user's browser and the CRM Self Service server. The server will present customized information to a user, related to previous visits to the site.

Visitor information is stored on the Self Service database in two visitors tables:

- **Visitors.** The Visitors table stores information related to both anonymous and registered visitors. When an anonymous visitor goes to the CRM site and asks for a Web page, a text string is stored on the hard drive. The next time the visitor returns to the same page they get a cookie. The cookie is an ID for the visitor.

- **Visitor Profile.** CRM can track the number of times each visitor logs onto the system. Based on this information, a potential customer can be generated as a lead, and the relevant information passed along to the customer. You can customize the type of information that is stored in CRM about registered visitors based on registration and profile information that is stored in the Visitor Profile table.

The eWaress.js File

The CRM Self Service application server can be run remotely from the CRM database server. For example, a customer care case entered in the CRM system can be viewed on the Self Service Web site.

The EWARESS.JS file is the component behind this functionality. This file works in the same way as a typical ACCPACCRM.JS file, but it is also responsible for establishing the link between the CRM database and the Self Service database, thus ensuring that the databases can communicate with each other.

It is important to note that the EWARESS.JS file (rather than the ACCPACCRM.JS file) is referenced in all Self Service ASP pages. For more information on the ACCPACCRM.JS and EWARESS.JS files, please refer to the *Developer Guide*.

Customizing the Self Service Web Site

The functionality available in the Self Service site and the extent to which you can customize it depends on whether you have the Extensibility Module.

Without the Extensibility Module

Without the Extensibility Module, you are limited to customizing a number of specific blocks. This may be sufficient, depending on implementation requirements. The blocks are accessible from Administration | Customization | <Entity> | Lists or Administration | Customization | <Entity> | Screens. Please refer to the table below for a description of the Screen and List blocks that can be customized without the Extensibility Module.

The following table describes the blocks referenced in the Self Service demo Web site.

Block Name	Type of Block	Description
sscaselist	List Object	Displays a list of cases for visitors.
ssopportunitylist	List Object	Displays a list of opportunities for visitors.
sscaseentry	Screen Object	Enables visitors to register new cases via the Web site.
ssopportunityentry	Screen Object	Enables visitors to create new opportunities in CRM, via the Web site.

You customize Self Service screens and lists from Administration | Customization in the normal way. Please refer to the *System Administrator Guide* for more information on screen and list customization.

With the Extensibility Module

With the Extensibility Module, you can use the complete set of eWare blocks to add extra functionality to your Self Service site.

You reference the blocks in ASP pages in the same way as you do within standard CRM. One difference, however, is that you reference the EWARESS.JS file (rather than the ACCPACCRM.JS include file) on all ASP pages.

Using the CRM interface and ASP pages, you can create new blocks for Self Service or use existing eWare blocks and restrict them to show less information. You can set screens to be read only or editable, restricting what different users can do on the page. User passwords can be allocated at Person or Company level. Refer to the *Developer Guide* for information on eWare blocks.

Typical functionality that you can add to the Self Service site using ASP pages includes:

- Enabling visitors to view product information via the Web site.

- Enabling visitors to view their visitor profiles and edit them via the Web site.

- Creating leads based on the information typed by the visitor.

- Contacting visitors directly by the customer care department.

Now you can…

- Plan a Self Service Web site.

- Understand basic Self Service architecture.

- Create and add functionality to a Self Service Web site.

Chapter 4
Self Service Security

In this chapter you will learn about:

■ Self Service security.

Application Level Security

CRM offers a number of security and access options at the application level.

■ **Server Level Security.** CRM supports all industry server security standards, and there are a number of methods available to secure the Self Service server.

– SSL (Secure Sockets Layer) encryption can be employed to secure data sessions with client users. When an SSL session commences, the server sends its public key to the browser. In turn, the browser uses this key to send a randomly generated key back to the server. As a result, there is a secret key exchange for the session. When IIS uses SSL encryption, CRM is aware of this and when the client attaches any documents to a form in CRM it sends through the encrypted sessions.

– A firewall can be used to restrict unauthorized access to the database. Firewalls are commonly employed to give users secure access to the Internet and, at the same time, separate a company's Web server from its internal network. Various types of firewall are available, including packet filter, proxy server, NAT (network address translation), and firewalls that adhere to stateful inspection technology standards.

CRM Self Service can run behind a firewall in order to protect the server from malicious attacks and to allow only certain types of interactions to take place. The CRM Self Service server can be physically separated from the CRM server, and a firewall can be installed around the CRM server.

■ **Database Level Security.** CRM Self Service users do not have direct access to the database. The CRM Self Service pages opened by the user send requests via IIS to the eWare DLL to access the database.

■ **Network Security.** CRM supports all industry standard network encryption protocols.

Now you can…

- Explain Self Service security.

Chapter 5
Self Service Administration in CRM

In this chapter you will learn about:

- The Self Service administration area in CRM.

- Enabling people for Self Service.

- Enabling companies for Self Service.

Self Service Administration

The Self Service administration area in CRM contains three tabs.

- **Visitor List**. This tab enables you to view a list of registered and anonymous visitors and view and edit visitor profiles.

- **Self Service Configuration**. This tab is used for specifying database connection settings.

- **Visitor Maintenance**. This tab lets you manage your visitor list, ensuring that it does not get too long or unmanageable.

Visitor List

The Visitor List page lets you:

- View a list of anonymous and registered visitors to the Self Service Web site.

Visitor List page showing all visitors

- Filter the visitor list to view anonymous visitors only.
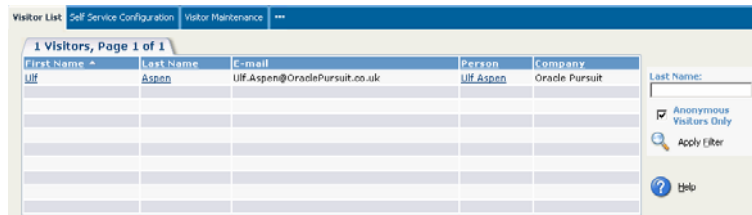
Visitor List page showing anonymous visitors

■   Search for individual visitors by their last name.

Visitors List page showing a search result

■   View and Edit visitor details, by clicking on the Last Name or First Name
     hypertext links. Note that selecting the Person hypertext link brings you to
     the Person Summary page.
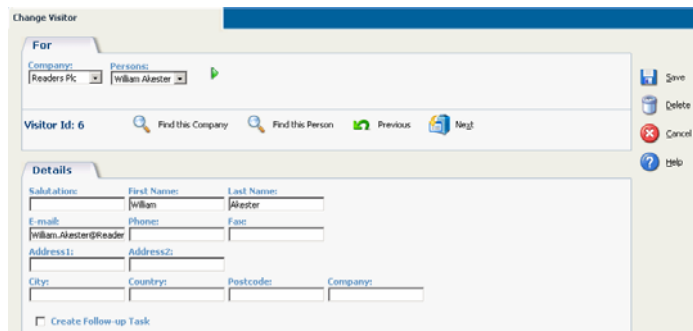
Change Visitor page

■   View and edit visitor profiles. The type of information that can be viewed
     depends on the particular implementation.

Self Service Configuration

The fields on the Self Service Configuration tab are set by default when you
install Self Service, although you may need to change them if you make changes
to either the CRM or Self Service database configurations.

To view the Self Service administration area in CRM:

1.   Select Administration | System | Self Service.

2.   Select the Self Service Configuration tab.

The Self Service Configuration page is displayed.

Self Service Configuration page

3. Select the Change button.

4. Enter the changes and select the Save button.

    The table below explains the standard fields on the Self Service
   Configuration page.

Field	Description
Database Driver	The type of driver on which the Self Service database sits.
Database Server	The name of the server on which the Self Service database sits.
Database Name	The name of the Self Service database.
Database User Name	The ID of the user who will be used to connect to the Self Service database.
Database Password	The password of the user who will be used to connect to the Self Service database.
Enterprise Driver	The type of driver on which the CRM database sits.
Enterprise Server	The name of the server on which the CRM database sits.
Enterprise Name	The name of the CRM database.
Enterprise User Name	The ID of the user who will be used to connect to the CRM database.
Enterprise Password	The password of the user who will be used connect to the CRM database.
Session Expires In (Hrs)	How long the Self Service session lasts for until the user is logged out.

Visitor Maintenance

Suppose you want to remove all anonymous visitors who have not visited your Web site in the past six months from the Visitor List.

To remove anonymous visitors:

1. Select the Visitor Maintenance tab.

2. Type **6** in the Delete Visitors field.
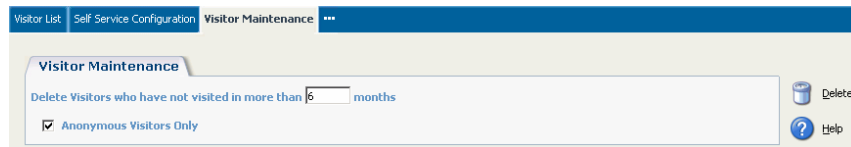
Visitor Maintenance page

3. Select the Delete button.

    You are asked if you are sure you want to proceed with the deletion.

Visitor Maintenance page

4. Select the Confirm Delete button.

    Anonymous visitors who have not logged onto the site in the last six months are removed from the Visitor List.

Enabling a Person for Self Service

To enable a person for Self Service:

1. Find the person you wish to enable and click on the hypertext link of their name to display the Person Summary page.

2. Select the Self Service tab.

    The Self Service page is displayed.
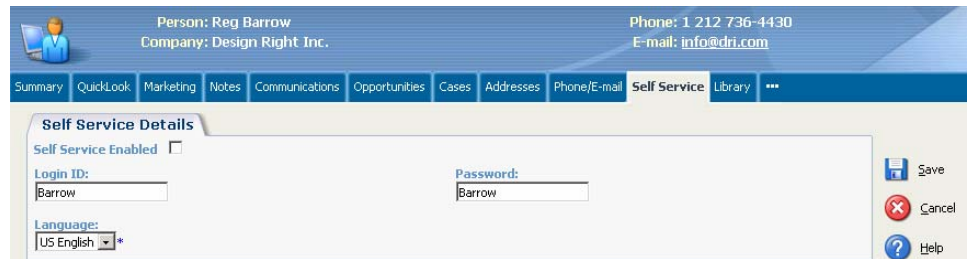
Self Service page before user is enabled

3. Select the Self Service Enabled checkbox.

    You can change the person's login ID and password by typing the new values in the Logon ID and Password fields.

4. Select the Save button.

    The person is enabled for Self Service.

5. The next time you select the Self Service tab for that person, Self Service and Person details are displayed.
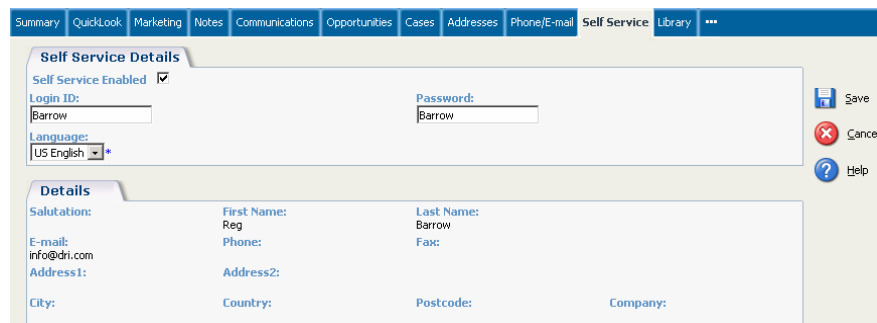
Self Service page after user has been enabled

Enabling a Company for Self Service

You can also enable companies for Self Service. You do this in the same way as you enable a person, except that you do it while you are in the Company context.

Now you can…

- Carry out Self Service administration tasks.

- Enable people for Self Service.

- Enable companies for Self Service

Chapter 6
Self Service Functionality

In this chapter you will learn about:

■   The Self Service functionality available to anonymous visitors and registered visitors.

Logging On

The following examples illustrate a typical Self Service Web site, the functionality contained in it, and how visitors navigate it.

The Self Service Web site has been designed for a company called Panoply Technologies, a Dublin-based wireless and Internet software provider.

For the main part, the examples assume that you are a visitor to Panoply's Self Service Web site.

To log onto the Self Service Web site:

1. Type the Self Service address in your Web browser. A typical Self Service URL will look something like this, depending on where the Web site is installed:

    http://*localhost*/CRMselfservicedemo/about.asp

    The Self Service home page is displayed.
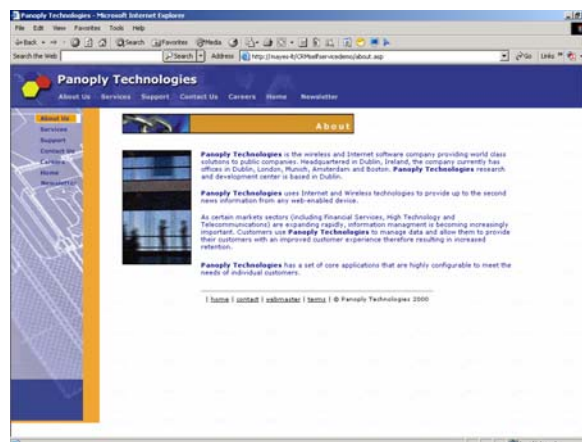
Self Service Home Page

Anonymous Visitors

Anonymous visitors are visitors who are not registered as CRM Self Service users and who, therefore, do not have a logon ID or password to access certain areas of the Self Service site. The following example illustrates what functionality *can* be designed specifically for anonymous users. **Note:** This functionality is not currently implemented in the demo.

Anonymous users *can be* given access to certain areas of the Web site. They navigate to these areas simply by clicking on the relevant links. Anonymous users can access the following areas of the Panoply Web site:

- About Us — an information page.

- Services — an information page.

- Support — anonymous users can only get as far as the support logon pages, but since they are not registered users, they cannot enter the support area.

- Contact Us — an information page.

- Careers — an information page.

- Home — the home page.

- Newsletter — a page with specific Self Service functionality.

Newsletter

The Newsletter area of the Panoply Self Service site *can be* designed especially for anonymous users.

To access the Newsletter area of the site:

1. Select the Newsletter tab.

   The Newsletter input form is displayed.

Newsletter input form

2. Complete the fields on the input form.

Newsletter input form

3. Select the Save button.

   When you do this, the information typed by the visitor is registered as a lead in CRM. From here, the lead can be assigned to a CRM user, the visitor can be converted to a Person in CRM and the lead can be eventually converted into an opportunity.

Lead Summary page

Registered Visitors

Registered visitors must already exist as people, individuals, or companies in CRM, and they must have been enabled for Self Service and assigned a Self Service logon ID and password. The following example illustrates what functionality can be designed specifically for registered visitors.

Registered visitors are typically given access to more areas of the Web site than anonymous visitors. They can view all of the areas of the site that anonymous visitors can view, and they can:

■ Review their current cases.

■ Log a new case.

■ View product information.

■ View and change some of their profile details.

Reviewing Existing Cases

To access the Support area of the Self Service site:

1. Open the Self Service Web site and select the Support tab.

   The Support logon page is displayed.

Support logon page

2. Type your User Name and Password and click the Login button.

   A message displays to inform you that you logged on successfully.

   A list of your recent customer case issues and opportunities is displayed. In this example, the customer has four cases but no opportunities. Closed cases are read-only, but you can access open cases and change certain details.

List of customer care issues and opportunities

3. Click on the case's Created Date to edit the case.

Overview   Report a problem   Request Information   Search For Solution

RefId:
5-10030
Problem Details:
Unable to run the report due to a SQL error.

[Change]

Problem details

4.   Select the Change button.

The Problem Details input form is displayed in edit mode.

Overview   Report a problem   Request Information   Search For Solution

RefId:
5-10030
Problem Details:

Unable to run the report
to a SQL error.

[Save]

Problem Details in edit mode

5.   Add more information or amend the current details, and select the Save
button.

Overview   Report a problem   Request Information   Search For Solution

RefId:
5-10030
Problem Details:

Unable to run the report due
to a SQL error.
...additional information.

[Save]

Changed Problem Details

The case details are changed on the Self Service Web site and the changes are
immediately reflected in CRM.

Case Summary page

Logging a New Case

To log a new case while you are still logged onto the Support area:

1. Select the Report a Problem hypertext link.

   The Report a Problem form is displayed. As you can see, the case is assigned a ReferenceID by default.

Problem Details input form

2. Type in the problem details, and select the Save button.

   The new case is logged.

Requesting Information

To request information on a specific product while still logged onto the Support area:

1. Select the Request Information hypertext link.

   The Request Information input form is displayed.

2. Complete the Description, Details, and Customer Ref fields, and select a product from the Product list.

Description:
Need product training *

Product:
Training

Details:
Need advanced system administrator training for two people as they are now up to speed on 'general' level.

Customer Ref:
A123

*

Save

Request Information input form

3. Select the Save button.

   The request for information is submitted to CRM, which results in a new Opportunity being created.

   The opportunity can then be assigned to a CRM user and the request for information dealt with.

Finding Solutions

Registered users can search the CRM Knowledge Base to find solutions.

To find a solution:

1. Click on the Search for Solution hyperlink in the Support area of the Self Service site.

Overview   Report a problem   Request Information   Search For Solution

Description:

Details:

Solution search fields

2. Type in the details of the problem you want to find a solution for.

   A list of solutions matching your search criteria is displayed.

Reference Id	Description
5-10016	Invalid License key error
5-10023	How do I define a template ?

Solutions list

3. Click on the solution hypertext link to view the details. Note that you can use the Continue button to return to the Search page.

Overview   Report a problem   Request Information   Search For Solution

Description:
Invalid License key error
Details:
If an invalid license key error is displayed you need to verify that ensure that the license key stored in the following directory is the license key that you are using:

c:\timesheet\licensekey\backup

If this does not match, please copy this key to the following directory:

c:\timesheet\licensekey

If the problem persists please contact the support group.

Continue

Solution details

Now you can….

- Describe the Self Service functionality available to anonymous visitors and registered visitors.

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