



***ACCPAC***  
**CRM**<sup>™</sup>

ACCPAC CRM 5.7  
Advanced Customization Wizard Guide

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# Chapter 1

## Introduction

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In this chapter you will learn about:

- What the Advanced Customization Wizard does.
- Prerequisites for using the Advanced Customization Wizard.
- Preparation tasks for using the Advanced Customization Wizard.

### Introduction

The Advanced Customization Wizard provides a quick and easy method for creating custom main entities in ACCPAC 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:

- An EIS (Enterprise Integration Server) or a DPP (Developer) license.
- 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.

## Now you can...

- Explain what Advanced Customization Wizard does.
- Discuss the prerequisites for using the Advanced Customization Wizard.
- List the preparation tasks for using the Advanced Customization Wizard.

# Chapter 2

## Creating a New Entity

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In this chapter you will learn about:

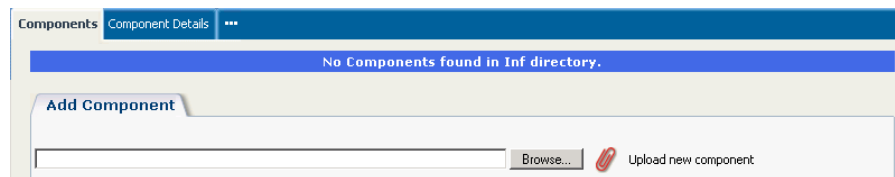
- Creating a new main entity.
- Creating a new entity called Project.
- The custom pages and metadata generated when the entity is created.

### Creating a New Main Entity

**To create a new main entity:**

1. Select Administration | Customization | Component Manager.

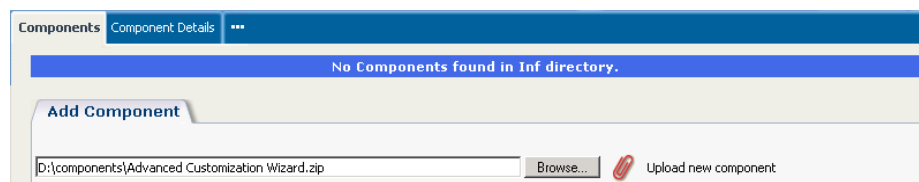
The Components tab is displayed. If there are any components available to install, they are listed in the Available Components list. If not, a message is displayed to inform you that there are no components in the INF directory – this is the directory on the server where components are stored. In addition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



Components tab

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

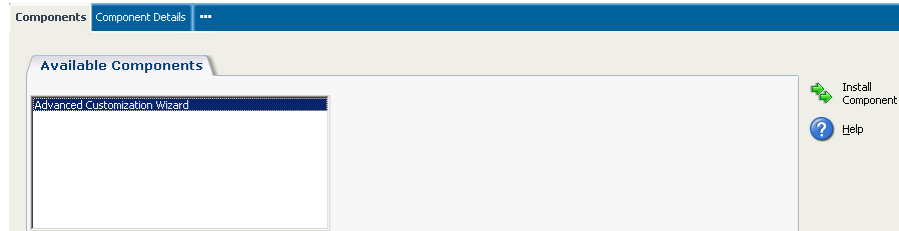
The path to the file is displayed on the Add Component panel.



Components tab

5. Select the Upload New Component button.

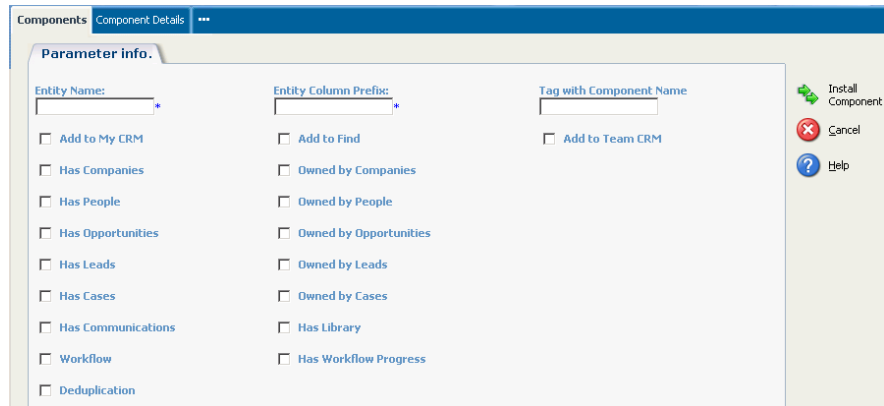
When you do this, the Advanced Customization Wizard ZIP file is unzipped and uploaded to the INF directory. If an INF directory doesn't already exist, it is created. The component becomes available in the Available Components list.



Available Components List

6. 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.

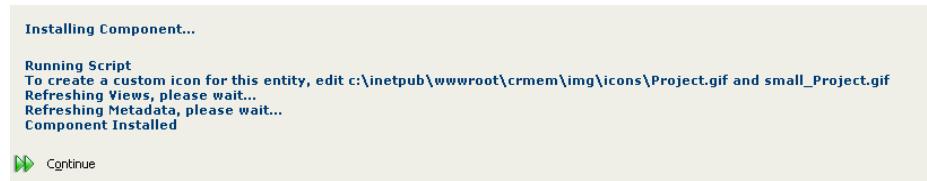


Parameter Info screen

7. 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.
8. Select the Install Component button.

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

- A custom tab group is created for the entity.
- A summary tab and corresponding summary entry are created by default and added to this tab group.
- Other tabs are created, depending on which fields you completed in Step 6.

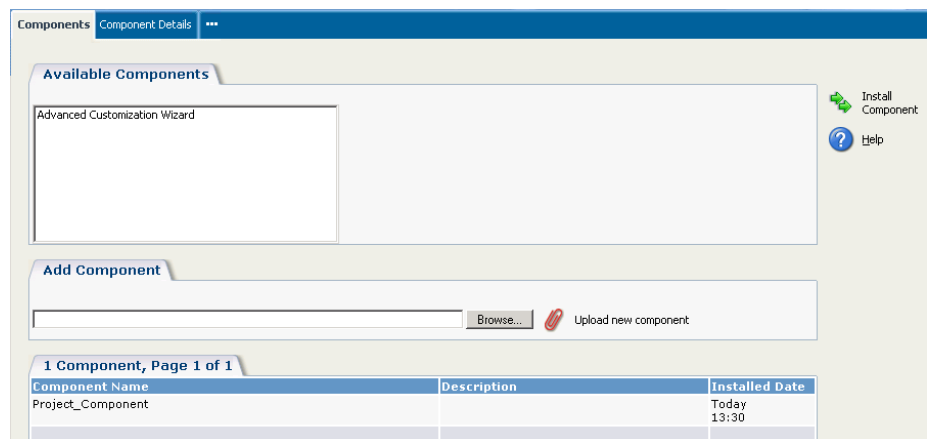


Installing Component progress messages

9. Select the Continue button

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

**Note:** The Advanced Customization Wizard component remains listed in the Available Components list. This enables you to create as many new entities as you require by selecting the component and following the installation steps above.



Component's page

11. 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.

<b>Field</b>	<b>Description</b>
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 your 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 SQL Server's rules for identifiers.

---

Field	Description
Tag With Component Name	<p>This allows you to script out and further customize new entities that you create.</p> <p>Once you type an entity name in the Entity Name field, the value in the Tag With Component Name field is set to &lt;EntityName&gt;_Component and a new component (with the same name) is added to your list of Existing Components.</p> <p>Having created a new entity, you can select the new component from the Existing Components list and:</p> <ul style="list-style-type: none"><li>■ Click on the Preview Script button to view all of the changes involved in creating the new entity.</li><li>■ Set &lt;EntityName&gt;_Component as the currently recording component and then make further customizations to the entity you created.</li><li>■ Script out the entire customization (entity creation and further customizations).</li></ul> <p>Refer to the <i>Developer Guide</i> for more information on scripting out components.</p>
Add To My CRM	<p>Select this checkbox to create a custom list and a custom tab for the My CRM section. This enables you to view a list of all the new entity records that are associated with a particular user.</p>

---

<b>Field</b>	<b>Description</b>
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 section of CRM. This enables you to view a list of all new entity records associated with a particular Team.
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.
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.
Has Opportunities	Select this checkbox to create an opportunities tab and to add a corresponding custom opportunities list to the tab group. This to allows you to see all the associated opportunities for all new entity records.

<b>Field</b>	<b>Description</b>
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.
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.

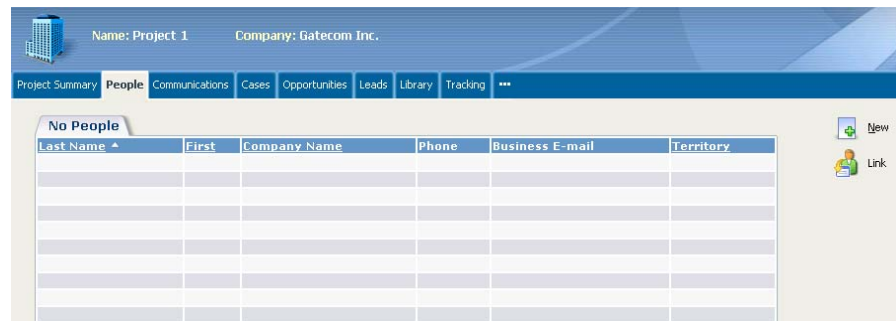
<b>Field</b>	<b>Description</b>
Owned By Companies	Selecting this checkbox adds a custom tab to the Company tab group that displays a list of all the associated new entity records for a particular company.
Owned By People	Selecting this checkbox adds a custom tab to the People tab group that displays 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 Lead	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.

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

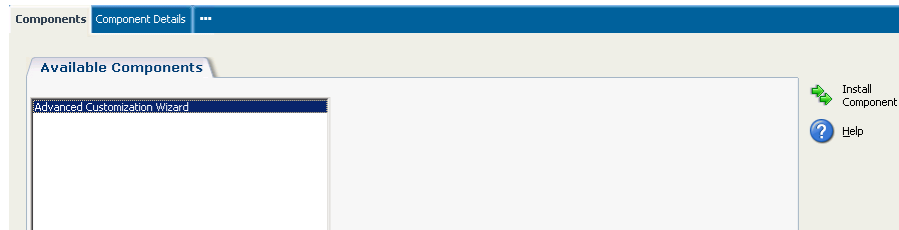
## Example: Creating a New Entity called Project

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.

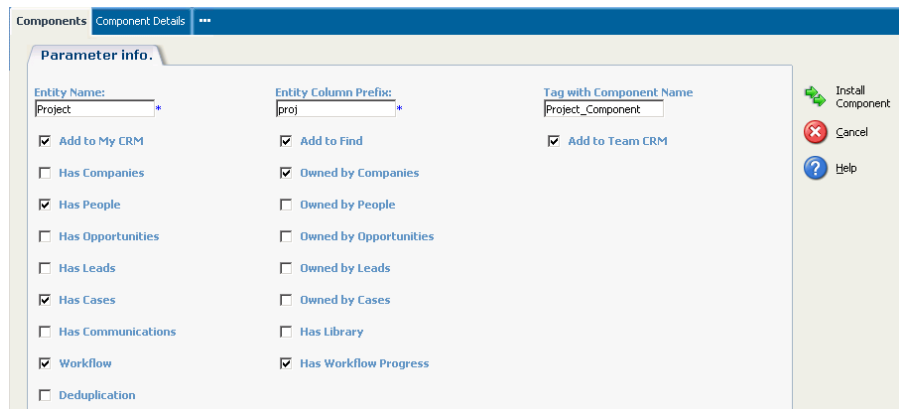
### To create the new entity:

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

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



Parameter Info screen

3. Select the Install Component button.
4. 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.

Tables 130 Items			
Name ▲	Owner	Type	Create Date
Project	dbo	User	25/09/2003 10:49:13
ProjectProgress	dbo	User	25/09/2003 10:49:09
Recurrence	dbo	User	25/09/2003 10:07:45
RollUpHistory	dbo	User	25/09/2003 10:08:39
Segments	dbo	User	25/09/2003 10:07:45
SLA	dbo	User	25/09/2003 10:09:06
SLAAction	dbo	User	25/09/2003 10:09:16

New Project table

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

**Customization**  
*You have reached the Customization home page. Simply select the Customization option you want to work on and then complete the administration task.*

**Translations**  
 Change system translations, create new ones, and activate inline translation mode to change field captions "on the fly".

**Component Manager**  
 Upload and install components, and create new ones if you have an EIS license.

**Primary Entities**  
*Select the primary entity you want to customize.*

**Cases**  
 Customize case fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for cases.

**Communication**  
 Customize communication fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for communications.

**Company**  
 Customize company fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for companies.

**Lead**  
 Customize lead fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for leads.

**Opportunity**  
 Customize opportunity fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for opportunities.

**Person**  
 Customize person fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for persons.

**Project**  
 Customize Project fields, screens, lists, tabs, blocks, table scripts and views.

Customization home page

Example: Creating a New Entity called Project

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



Field Caption	Field Name	Field Type	Size	Default	Required	Read Only
Team	proj_channelid	Team Select		✓		
Company	proj_companvid	Search Select Advanced		✓		
Name	proj_name	Text	30			
Progress Note	proj_progressnote	Multiline Text	0			
User	proj_userid	User Select		✓		

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

Project

Name:  User:  System Administrator Teams:  Operations Company:

Save Cancel

New Project screen

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

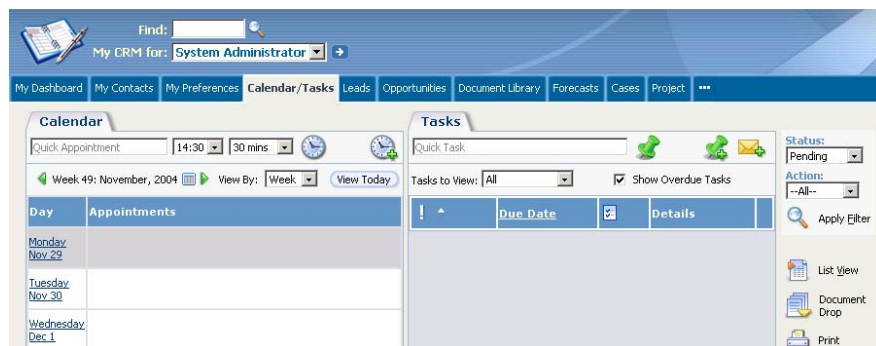


Name: Project 1 Company: Gatecom Inc.

Project Summary People Cases Tracking ...

Project tabs

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



Find:

My CRM for: System Administrator

My Dashboard My Contacts My Preferences Calendar/Tasks Leads Opportunities Document Library Forecasts Cases Project ...

Calendar

Quick Appointment 14:30 30 mins

Week 49: November, 2004 View By: Week View Today

Day	Appointments
Monday Nov 29	
Tuesday Nov 30	
Wednesday Dec 1	

Tasks

Quick Task

Tasks to View: All Show Overdue Tasks

Due Date	Details

Status: Pending

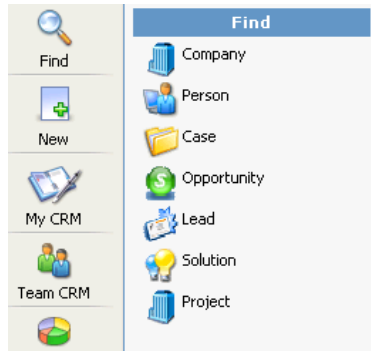
Action: --All--

Apply Filter

List View Document Drop Print

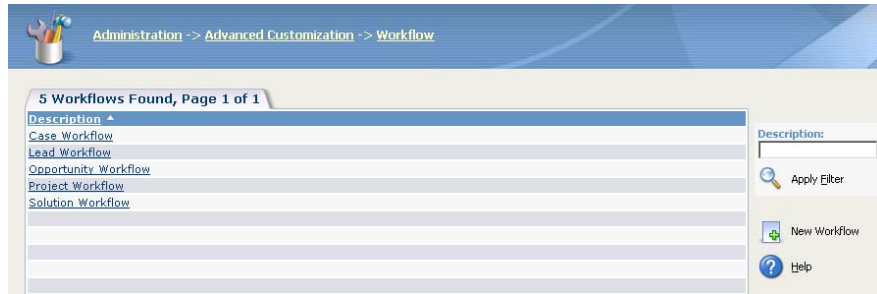
My CRM tabs

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



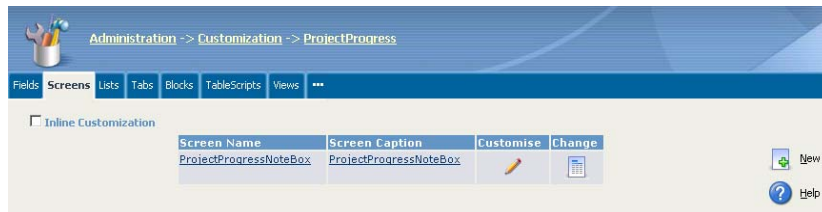
Find pop-out menu

- Workflow is available for Projects.



Workflow list

- A Project Progress secondary entity is created.



Project Progress screen

## 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:

...inetpub/wwwroot/CRM/CustomPages/<Entity Name>

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

Field	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
<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.
<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

<b>Field</b>	<b>Description</b>
<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>User.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.
< Entity Name> <Company> Link	Enables you to create links between the entity records and other entities, for example companies, people, opportunities, cases etc..
<EntityName>New	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	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.

<b>File</b>	<b>Description</b>
<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>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>TeamsGrid	The grid used to list new entity records for a particular Team.
Case<entityname>Grid	The grid used to list new entity records for a particular Company (if Owned By Case is selected on the Parameter Info screen).
Company<entityname>Grid	The grid used to list new entity records for a particular Company (if Owned By Company is selected on the Parameter Info screen).
People<entityname>Grid	The grid used to list new entity records for a particular Person (if Owned By People selected on the Parameter Info screen).
Lead<entityname>Grid	The grid used to list new entity records for a particular Lead (if Owned By Lead is selected on the Parameter Info screen).
Opportunity<entityname>Grid	The grid used to list new entity records opened by an Opportunity (if Owned By Opportunity is selected on the Parameter Info screen).

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<b>File</b>	<b>Description</b>
<entityname>BoxDedupe	The deduplication screen for the custom entity (if Deduplication is selected on the Parameter Info screen).
<entityname>SummaryScreen	The summary screen for new entity records.
<entityname>ProjectNewEntry	The entry page for creating a new entity records.
<entity>SearchBox	The search screen for finding a new entity records.

---

## 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

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In this chapter you will learn about:

- Customizing the new entity.
- Changing the new entity logo.

### 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 and 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.

Field Caption	Field Name	Field Type	Size	Default	Required	Read Only
Team	proj_channelid	Team Select		✓		
Company	proj_companvid	Search Select Advanced		✓		
Name	proj_name	Text	30			
Progress Note	proj_progressnote	Multiline Text	0			
User	proj_userid	User Select		✓		

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:

...Inetpub\wwwroot\CRM\img\icons

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

## Now you can...

- Customize the new entity.
- Change the new entity logo.

