

JSW CRM 3.2.series

Contents

JSW CRM	0
Contents	0
About JSW CRM	1
Install JSW CRM	2
Setting JSW CRM	3
Google Maps	4
Categories in JSW CRM	6
Add and manage items	8
Tags	12
Locations	14
Users	16
User rights in JSW CRM	17
Menu Creation and managing	19

About JSW CRM

Version: **3.2.6**

Date: **August 2018**

About JSW CRM

JSW CRM was initially developed by JS Webdesign to be able to manage contacts in a Joomla 3 website with a simple frontend and backend interface.

Since the new version 3.2.6 it is now possible to add documents, videos and audio in addition to contact information, which makes JSW CRM a multi-use tool to manage various types of data and pages quickly and efficiently.

The basis of JSW CRM on which it runs is the HMVC Framework developed by JoomlaTools, which is also used for Docman, a popular Document Management component.

JoomlaTools Framework

Thanks to the JoomlaTools Framework, the code base of JSW CRM is clear and can be easily extended / adapted for specific circumstances.

Look in the developers section of this document.

The main strength of JSW CRM lies in the display management via the settings in the menu buttons and the user management.

The rights and representation of the existing items in JSW CRM are easy to set up in a huge number of ways.

You want to give users of a website only access to the frontend as a registered user or author of the website because of the security.

With JSW CRM it is possible.

The screens of JSW CRM to add and edit new items are very user-friendly and easy to use for managing and add items.

Whether a user can, for example, delete his own items, create tags in the tag system himself, or edit his / her categories himself, can be set in the settings.

Information and items in JSW CRM can also be connected to an ordinary article page or K2 item via the buttons in the text editor in their content.

In the description you will find explanations per topic with examples of how JSW CRM works and what the possibilities are.

Install JSW CRM

JSW CRM can normally be installed via the normal procedure, just like all other components.

With some providers, JSW CRM may be too large in size for the normal installation procedure.

In that case, extract the .zip file locally on your computer and upload the file to the / tmp folder on the server that is created by default during the installation of a Joomla CMS. After this you can still install JSW CRM via the possibility to install from a folder.

During the installation, the JoomlaTools Framework is installed first and then JSW CRM. If the installation has been completed correctly, you can immediately start working with JSW CRM by creating your first category.

JSW CRM uses the built-in updates system in Joomla, so if a new version is released, you will immediately receive a notification through the update system.

Setting JSW CRM

Opslaan **Opslaan & sluiten** **Annuleren**

Google maps Key
/ z SyD_qVZr-0y164u_yu**LrgWCnntj**O4OL . **Bewerk**

Sla bestanden op in
Bewerk

Sta uploaden van bestanden toe naar
 Unlimited **MB**

On Internet Explorer 9 or older and some mobile browsers, the upload limit will be **127** megabytes due to server limits. See [this tutorial](#) to increase it.

Creëer miniatuurweergaves van de geüploade foto's
Ja **Nee**

Automatic monitoring BETA
Automatic monitoring explanation

Automatically create a category for new folders
Ja **Nee**

The new category will inherit settings such as permissions and owner from the parent folder category

Automatically create a document for uploaded files
Ja **Nee**

The new document will inherit settings such as permissions and owner from the folder category

Use human readable titles for created categories and documents

Globale rechten

Gebruikers kunnen hun eigen contacten en categorieën bewerken
Ja **Nee**

Gebruikers kunnen hun eigen contacten en categorieën verwijderen
Ja **Nee**

Users can add new tags in contact form
Ja **Nee**

Joomlatools Connect
Document scan requires connect
Scan all contacts
Scan all contacts info

Migrate
Export JSWcrm data
Export JSWcrm data for backup or site migration.
Import from ZIP file

In the settings screen you can set the basic settings of JSW CRM, such as global user rights settings and what types of files you can upload and manage.

The settings are straightforward and the screen is equipped with all kinds of explanations what the setting is for.

If you are satisfied with your selection, click Save & Close.

Google Maps

At the top you can enter a Google Maps code for the map function of JSW CRM.

See the next topic in the description above.

Google Maps

In JSW CRM we use Google Maps to manage the locations, the address input screen and the Maps module that can cluster locations on a map using the settings of a menu item.

A Google Maps account must be created for this.

This can be done via

<https://developers.google.com/maps/documentation/javascript/get-api-key>

You can create an api code for each domain where you want to use JSW CRM.

You enter this code at the top in the settings screen of JSW CRM on the administrator side.

After the code is set up there, all functions that use Google Maps will work if it's okay.

It is best to have the owner of the domain or project create an account on his or her Google account.

After this is set you can also use

<https://developers.google.com/maps/documentation/javascript/usage>

to find statistics of use.

Setting up the code can be a bit of a "circus" by the way, it is not the most user-friendly interface.

Addresses and map locations in JSW CRM

When you add a new contact or item and you want to provide it with a location, click on add address in the work screen.

Start by typing in the street name and number, Google maps gives you suggestions what should be placed in a lightning fast way.

The Google address database is very accurate, but it is possible that you can not set up an address in exceptional cases.

There is a possibility to expand the screen, if necessary, with latitude / longitude fields, so that you can add these addresses correctly in your data.

You can give the various locations in your data a name.

If you have multiple items that need to be added in one location, that can be useful.

You then only have to select the name of the location and the details of the address are entered immediately.

Categories in JSW CRM

When you use JSW CRM for the first time after the tool is installed, JSW CRM will ask you to create a category.

You can create the category system in JSW CRM with main categories and (nested) subcategories. This can be done in multiple levels.

The category must have a name, the rest of the settings is optional.

Rights

In the category settings, you can set the permissions who can have access to this category. So you can work with multiple user groups in various ways.

It is even possible to give only a specific user group access only to the data in a category.

Or make a category available for all groups from a certain user rights level.

When you add items to a category, by default the access rights of that file become the same as the user rights of the category.

This is super useful if you have to add multiple items to a category, these automatically get the right rights.

Menu items

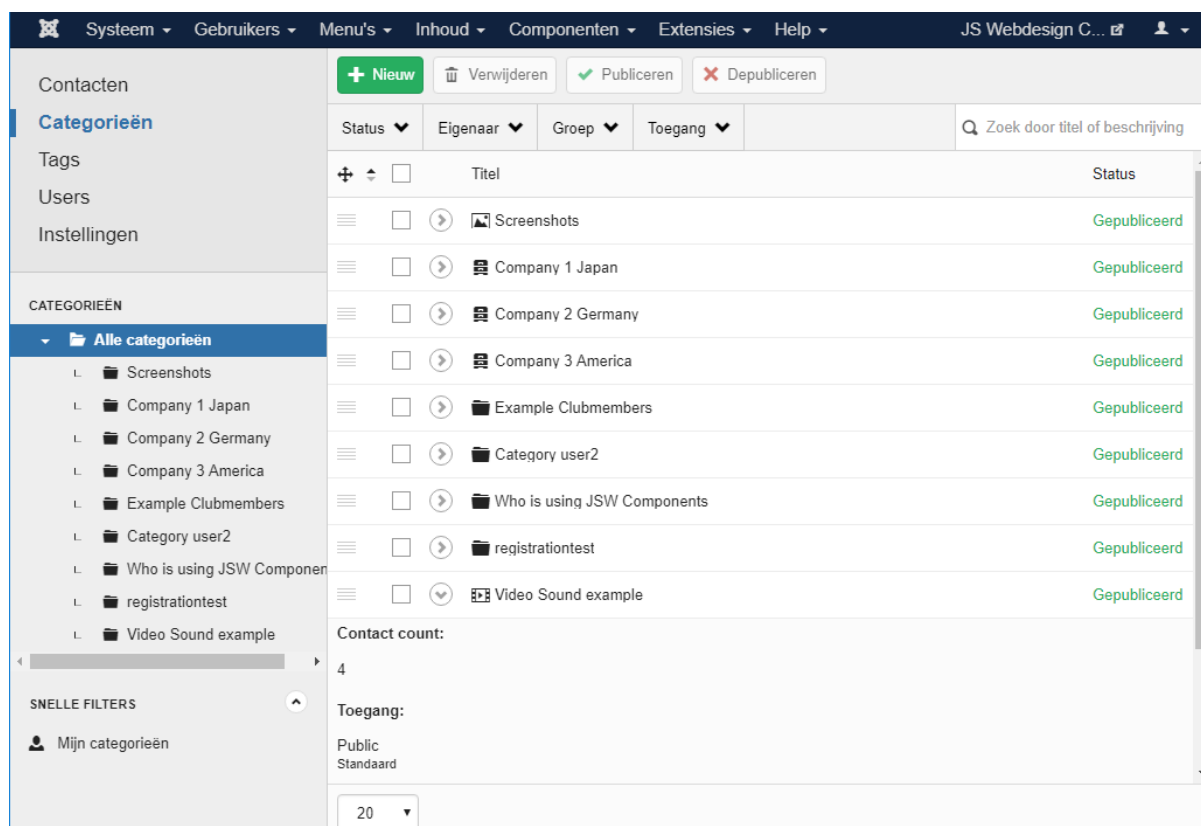
Eventually the created menu buttons determine which data is available to the visitor of the website.

If you create a menu button to display the items in a category on a page and this menu button is on public rights, for example, while the category is only available to registered users, the public visitor will see a login screen in that case.

Administrator interface

The administrator interface, see example below, is simply arranged and looks the same in terms of layout and the like.

The interface can also be used on eg a mobile or tablet and automatically adapts to the device that is being looked at.



Screen categories in JSW CRM

Applications with large numbers of categories

Even applications of JSW CRM with large (several hundred) numbers of categories are in principle no problem.

The Framework that JSW CRM runs on makes it possible to a cache system to ensure that everything continues to respond and function smoothly.

Customize / edit a category

To adjust a category, simply click on the title of the category.

The edit screen opens and you can adjust the data.

When you're done click on Save & Close.

Add a description

You do this in the edit screen in the description field with the set word processor on your Joomla installation.

JSW CRM picks it up automatically, with all settings, from your Joomla installation.

Add an image to a category

You can provide a category with an image by clicking Upload in the edit screen on the right-hand side at Featured Image.

Choose the image you want on your PC and click on upload.

You will immediately see the image in the box.

When you're done click on Save & Close.

Add and manage items

Opslaan **Opslaan & sluiten** **Opslaan & nieuw** **Annuleren**

Titel
Alias Will be created automatically

Bijz. opmerkingen (alleen admin kant website) Bijz. opmerkingen (alleen admin kant website)

Bestand Video Afbeelding

Bestand/afbeelding/video instellingen

Uploaden / Laat hier een bestand achter [Select een bestand bestand](#)

Vul een URL in

Categorie
Category user2

Tags

Voeg het adres in

[Contact zonder adres](#)

Contactdata

Telefoonnummer
Telefoonnummer

Mobiel nummer
Mobiel nummer

E-mailaddress
E-mailaddress

E-mailaddress 2
E-mailaddress 2

Twitter
Twitter Vul de hele url in (incl. http(s)://)

Youtube

Afbeelding

Geen Uploaden Web
Genereer automatisch

Image search requires connect

Publiceren

Status
Gepubliceerd Gedepubliceerd

Datum

Start publicatie op

Stop publicatie op

Rechten

Toegang
Inherit from category Groups Presets

This contact can be viewed by:

- Registered

Eigenaar
JS Webdesign

Audit

Downloads
0

The screenshot displays the administrator interface for JSW CRM. At the top, there are five social media link fields, each with a corresponding icon and a text input area: Facebook, LinkedIn, Pinterest, Instagram, and Website. Below these are two 'Extra veld' (Extra field) sections, each with a text input area. The main content area is a rich text editor with a toolbar containing various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent), alignment, font family, font size, color, background color, link, unlink, image, video, table, and other elements. The editor is currently in 'Editor' mode. At the bottom of the editor, there is a footer that reads 'Powered by JCE Core. Get more features with JCE Pro'. Below the editor, there is a 'Path: ...' field and a 'Words: 0' counter. At the very bottom, there is a navigation bar with several buttons: Linker, Simple Image Gallery Pro, Contactlink, Document, Module, and Menu.

Above a screen dump of the item screen in the administrator section of JSW CRM.

Add new item

By default, JSW CRM opens in the screen that gives an overview of the existing items in JSW CRM.

By clicking the Green button + New at the top you can add new items.

A Title for the item, a file and selecting a category are the required fields.

Edit an existing item

In table view that shows you the items from 1 or all categories, click the Title of the item to edit it.

Delete items

By placing a check mark for 1 or more items in the overview screen of the items and clicking on the delete button in the toolbar you can remove it. JSW CRM gives a popup with the question whether you are sure that you want to delete this data.

The types of files that you can add

You can add the following files:

- A picture
- A document

You can find the types of documents you can add in the list in the Settings screen.

When you try to add a file that does not appear in the list, JSW CRM gives an error message.

If you still want to use such a file in your system, you can add the file extension to the list of allowed extensions in the Settings screen.

- A video
- A link to another webpage or to a video of the video networks Youtube or Vimeo.

At the links to videos on Youtube and Vimeo, the JSW CRM page of that item is automatically provided with a player screen. You can also set this per menu button or the player is displayed.

- An audio file

The other information that can be added is optional.

Connect

When your website is equipped with Joomla!tools Connect plugin, when you add a pdf document to JSW CRM for example, a thumbnail of the first page of that pdf file is automatically created and displayed on the JSW CRM page of that item.

The Joomla!tools connect plugin is part of a 1 of the paid licenses on Joomla!tools.com

In addition to the fact that Connect creates a thumbnail of a pdf document, the relevant pdf file can then be searched for text via the standard search bar of the Joomla! cms system.

The same possibilities of managing an item via the administrator screen are also present in the front-end interface.

Moreover, it is fully responsive, so that it is even possible to manage this via a mobile.

Icon with your item

You can provide an item with an icon (to the left of the Title above).

By default there are a number of icons present, however you can also add your own icon by uploading 1 to JSW CRM.

This can be a jpg or png file. A square image works best.

When you have created / added an icon yourself, you can use it for multiple items by selecting "m" for another item as icon.

You can also decide per menu button whether the selected icon on your website will be displayed on the web pages.

Address / Location data

An item in JSW CRM can be provided with address / location data.

You can find more information in the Google Maps section in this description.

To enter an address you start by typing the street name and number. Google Maps automatically gives you suggestions for the right location.

Contact details

By default, the following data can be added to an item in JSW CRM

- phone number
- Mobile number
- E-mail
- Various Social Media addresses
- Website address
- Finally, JSW CRM has two extra fields that you can use for specific information that you want to add to your items.

Comments

Only in the work screen in the administrator you can provide an item with a comment. This is shown in the table overview of the items in a different color with the item, so you can quickly see if an item has a comment.

Image with your item

When you have entered an item that contains, for example, a web link or a video link, no image for the item is created by JSW CRM itself.

In such a case, you can add an image yourself via the image tab in the upper right-hand screen.

If you have added an image, you can use it for other items by selecting it directly from the list in the pop-up screen where you can upload an image.

Tags

In addition to a category structure for categorizing items, JSW CRM also has a tags system. By tagging items with tags, selections and views can be made based on these tags, so that a web page shows all the items, or the items from a certain category, which are tagged with 1 or a set of tags.

Alias

Bijz. opmerkingen (alleen admin kant website)

Bestand Video Afbeelding

Bestand/afbeelding/video instellingen

Voer de externe URL in het bovenstaande veld in

[Upload een afbeelding of bestand](#)

Categorie

Tags

Item tagged

Systeem ▾ Gebruikers ▾ Menu's ▾ Inhoud ▾ Componenten ▾ Extensies ▾ Help ▾ JS Webdesign C... ▾			
Contacten Categorieën Tags Users Instellingen	<input type="button" value="+ Nieuw"/> <input type="button" value="Verwijderen"/>		<input type="text" value="Zoek door titel of beschrijving"/>
	<input type="checkbox"/> Titel		<input type="button" value="Print"/> Datum
	<input type="checkbox"/> jswcars	1	09 oktober 2017
	<input type="checkbox"/> jswcrm	5	09 oktober 2017
	<input type="checkbox"/> jswevent	3	09 oktober 2017
	<input type="checkbox"/> jswrealestate	1	09 oktober 2017
	<input type="checkbox"/> team1	4	30 augustus 2016
	<input type="checkbox"/> team2	4	30 augustus 2016
	SNELLE FILTERS <input type="button" value="▲"/> <ul style="list-style-type: none"> <input type="checkbox"/> My Tags <input type="checkbox"/> Recent toegevoegd <input type="checkbox"/> Recent bewerkt 		
	<input type="text" value="20"/> ▾		

Tags screen

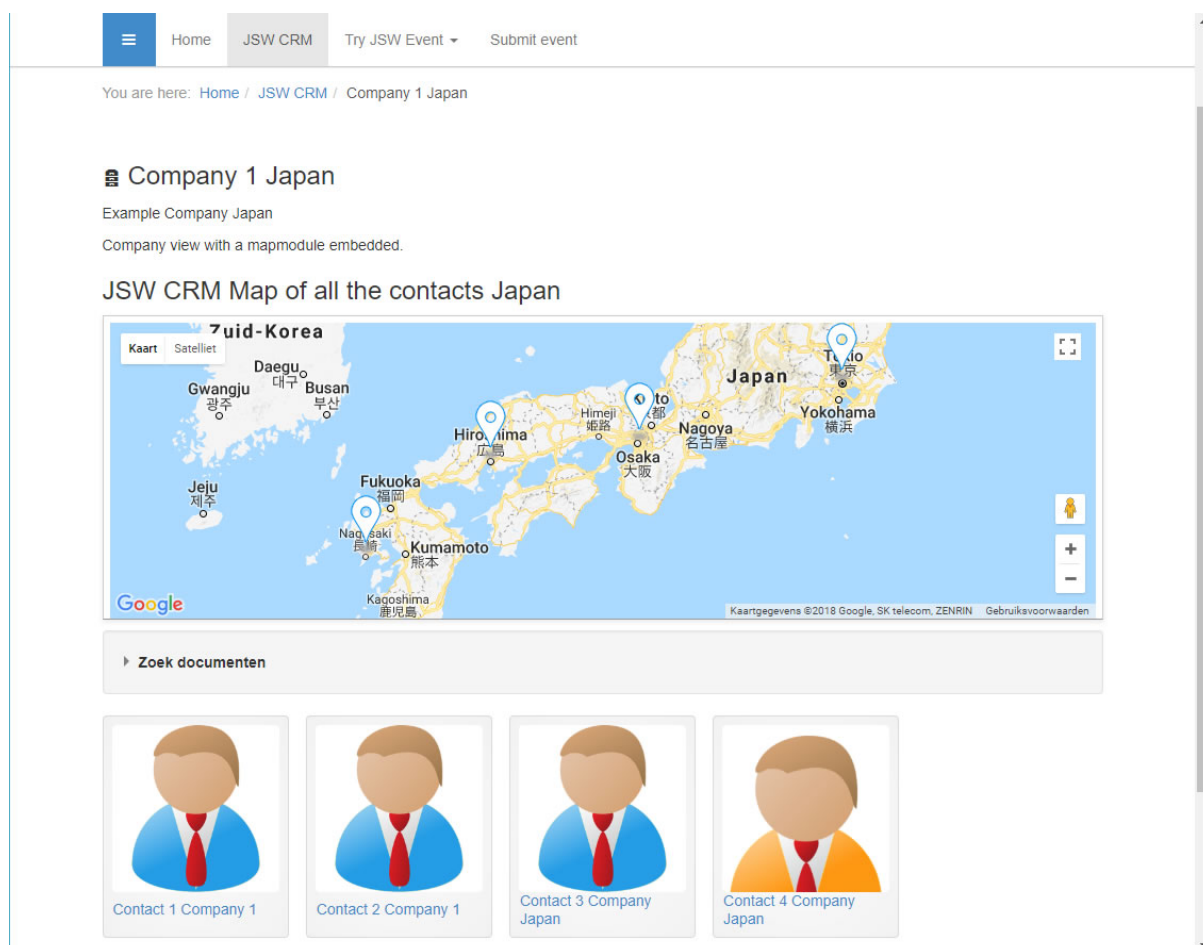
Overview screen Tags in administrator

Tags can be managed separately via the Tags screen in the administrator.

Adding and editing is simple. You can add new ones here or modify existing tags that are linked to items, for example if you want to change the text.

Locations

1 of the most useful features in JSW CRM is the location system, with which items can be linked to a place in the real world.



Example location

Here is an example of a page on the example website on jswebdesign.nl, a map from the module contact module and an overview of the items visible on the card.

In this example, the module is placed in the description of the category. Only 1 map of Google Maps can be shown per webpage. This is a limitation of Google Maps.

For more information, see the Google maps section in this description.

The item itself can also be provided with a representation of the location on a map. The format of the card can be set to 4 formats via the settings of the menu button that displays the items.

Users

The Users screen is present in the administrator.

Here you can see at a glance which users are of JSW CRM and which user rights these users have.

<input type="checkbox"/>	Naam	Username	Ingeschakeld	Activated	User Groups	Last Visit Date	Registration Date
<input type="checkbox"/>	JS Webdesign	jswebdesign	✓	✓	Registered, ...	24 augustus 2018	15 augustus 2016
<input type="checkbox"/>	user2	user2	✓	✓	Registered	04 juni 2017	16 augustus 2016
<input type="checkbox"/>	Braun	Wiemaker,	✓	✓	Registered	14 november 2016	14 november 2016
<input type="checkbox"/>	J Marvin	jmarin	✓	✓	Registered	21 november 2016	21 november 2016
<input type="checkbox"/>	Hector Las Marín	almentia	✓	✓	Registered	30 november 2016	30 november 2016
<input type="checkbox"/>	Rakel Janssen	rajder	✓	✓	Registered	11 december 2016	11 december 2016
<input type="checkbox"/>	cvst	cv	✓	✓	Registered	02 januari 2017	02 januari 2017
<input type="checkbox"/>	Oracle	oracle	✓	✓	Registered	07 januari 2017	07 januari 2017
<input type="checkbox"/>	davermax	davermax	✓	✓	Registered	21 januari 2017	21 januari 2017
<input type="checkbox"/>	Nathaniel	nathat66	✓	✓	Registered	30 januari 2017	30 januari 2017
<input type="checkbox"/>	Mario M...	mmhic	✓	✓	Registered	23 februari 2017	23 februari 2017
<input type="checkbox"/>	kiel	kiel	✓	✓	Registered	09 maart 2017	09 maart 2017
<input type="checkbox"/>	Bernard	bergwerk	✓	✓	Registered	17 maart 2017	17 maart 2017
<input type="checkbox"/>	Laurent	ltholan	✓	✓	Registered	31 maart 2017	31 maart 2017
<input type="checkbox"/>	Ryan	rihr1	✓	✓	Registered	06 april 2017	05 april 2017
<input type="checkbox"/>	lui	luexpi	✓	✓	Registered	04 juni 2017	04 juni 2017

The screen users

In this screen you can optionally adjust the user rights per user

User rights in JSW CRM

As already mentioned, the rights of the items belonging to a category are set in the settings category.

Opportunities

Set up access

The Access tab in the category settings has 3 options

- Use default
- Groups
- Presets

Use default

When your Joomla installation is configured to allow the visitor to have standard access to all public items, this is the default category setting for rights.

Groups

With the tab Groups you can only make a category visible for 1 or more groups.

For example, if you want to display a category and make it available for a specific group without inheritance to another, you can do it here.

Presets

Presets provides a default selection list of all the set user groups in your Joomla installation

For example, if you set the category for registered users only, the content from the user level will be registered here and higher for the users of your website.

Rechten

Toegang

Gebruik standaard Groups **Presets**

Public ▼

This category can be viewed by:

- Public

Eigenaar

JS Webdesign ▼

Actie

Pas actietoestemmingen aan

Alleen voor geavanceerd gebruik

Rights tab in JSW CRM

Menu Creation and managing

To display items in JSW CRM, menu buttons must of course be created for this.

In JSW CRM you can display items in many different ways in almost all conceivable selections.

Below a short selection of the possibilities:

Basic selection

- Hierarchical list
- A single item
- Flat list
- Tree view

You can then have this selection appear on 3 views on the page

- List view
- Gallery View
- Table view

In addition, you have the following options in the menu button:

- Display only the items of the currently logged in user
- Only items with 1 or a set of tags
- Only items from a specific user

Here a short explanation of the Basic selection options

- Hierarchical list
- With Hierarchical list you can first select all or 1 category from the categories to display. Then you can set in the category settings whether you want to see the subcategories of the selected category or not.
- A single item
Select the item you want to display on the page
- Flat List
With a flat list you can select 1 or more categories to display. The items are then displayed without categories at the top of the page.
- Tree view
Select a category you want to display with its subcategories
On the left-hand side this page shows the categories and on the right side the items in of course list, gallery or table view on the basis of your view selection.

Which items you want to see in a display of the items can be set with buttons and selections in the tabs Jswcrm.

You can set the following items:

- number of items per page
- sort the items
- where the title links to
- search bar
- limit bar and items per page
- Display title
- View tags
- Description
- Display icon
- mark new items
- highlight popular items
- publication date
- date last adjustment
- filename
- download button
- display the size of the file
- show number of downloads
- extension of the file
- Track number of downloads
- display file heading
- Display video / audio player (when a video link or file is inserted)
- format of the card and card on or off
- Open downloads in a new tab
- Force download of all files
- number of days that an item is marked as new
- After how many downloads an item is marked as popular
- Various display settings of the category

A new menu item that is created has default settings in the settings, so you usually only need to adjust a few things to get the view of the items you want.