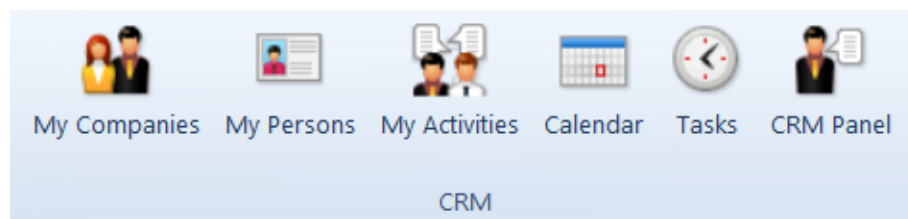# Activation of CRM module

CRM objects are available from the level of:

- *dedicated CRM menu*
- *Main menu*
- *list of customers/vendors available from the level of the tab Main → Customers/Vendors*

Upon starting the system, the CRM-related functions are disabled. To **activate** the functions, it is necessary to:

- *define a new employee*
- *associate the employee with a currently logged-in operator*

To be able to use the module in full, it is necessary to define the subordination structure.

CRM area

Operator permissions

From the level of *Configuration → Company Structure → Operator Groups →* tab *Other Permissions,* are available permissions to:

- [**list of activities**](#) (of employoess in child centers/co-workers/all empolyees)
- **list of customers and vendors of co-workers**

- **list of contact persons of co-workers**
- [list of tasks](#) (of employess in child centers/co-workers/all empolyees)
- [modification on CRM actions](#)
- [modification of questionnaires to fill](#)
- [modification of tasks](#)
- [calendars](#) (of employess in child centers/co-workers/all empolyees)

CRM area and its permissions are based on companies defined in the [subordination structure](#). In this case, groups of persons specified for these permissions should be intended as:

- **all employees** — all employees defined in the system
- **all co-workers** — group of employees within one unit defined in the subordination structure to which belongs the employee associated with a currently logged-in operator
- **employees in child centers** — group of employees within one unit defined in the subordination structure to which belongs the employee associated with a currently logged-in operator and groups of employees assigned to child units of that unit

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Subordination structure

Subordination structure allows for defining hierarchy between employees and company units on the asis of which are assigned permissions related to CRM functionalitires. The structure tree is available from the level of *Configuration → Company Structure → Subordination strucutre.*
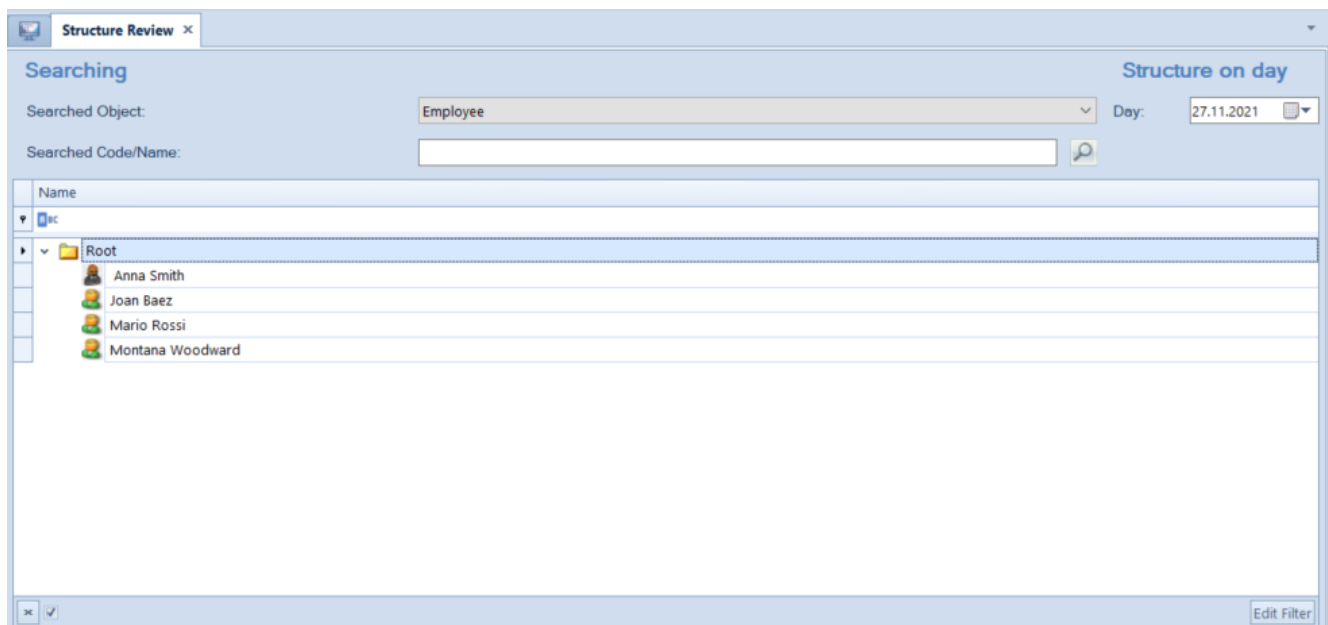
If the subordination structure has not been defined, then it will be possible to view only those objects that are

associated with the employee on whom a user is logged on. However, the activities, tasks, calendar, contact persons, companies of other employees will not be visible.

The structure is created by adding new units (centers) and adding employees defined in the system to that units. Under [**Add**] button, the following options are available:

- **Add Unit**
- **Add Employee**

[**Show Subordinates**] — this button is active when the manager is marked on the structure tree. Clicking on the button opens the list of employees assigned to his/her unit (center).

Subordination Structure