Sage CRM 2018 R3
User Guide

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acutedata

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About this guide

This guide is for Sage CRM users who know how to use a web browser. The navigation instructions in the guide assume that you're using the Contemporary Theme.

This guide refers to *Sage CRM* but your system might have a different brand name, such as *Sage 200 Sales and Marketing*. The system works in the same way regardless of its name. The functionality that's available to you depends on the modules that you're licensed to use.

This guide has the following chapters:

Chapter	Description
Getting started	Provides general information about Sage CRM, its user interface elements, and how to start using the system.
Contacts	Provides information on how to manage contacts in Sage CRM You can find out how to: • Work more effectively with large amounts of data. • Build a customer profile and keep customer information up to date. • Manage your calendar, schedule meetings, and set reminders. • Send and reply to emails from Sage CRM and use email templates. • Work with Sage CRM Exchange Server Integration. • Work with Sage CRM Classic Outlook Plugin: synchronize contacts, tasks, and appointments. • Work with Sage CRM Lite Outlook Plugin: add contacts and file emails from Microsoft Outlook to Sage CRM. • Store customer data in documents and use them for printing, faxing, or emailing.

Chapter	Description
Sales	Provides information on how to work with sales opportunities and forecasting: • Progress a qualified lead through to a closed deal. • Create and submit a sales forecast.
Marketing	Provides information on how to: • Work with a list of outbound phone calls. • Work with unqualified prospect information. • Set up and manage groups. • Manage and track marketing campaigns. • Create a MailChimp campaign and view campaign statistics.
Customer service	Provides information on how to: • Progress a customer service issue from logged through to resolution. • Work with Service Lever Agreements. • Create and publish solutions to expand your company's knowledge base.
Reports	Provides information on how to generate reports.
Dashboards	Provides information on how to: • Set up interactive dashboards and add gadgets. • Set up and customize classic dashboard pages. • Use preferences to change how Sage CRM displays information.
Mobile	Provides information on how to: • Work with Sage CRM mobile apps. • Use Sage CRM on a mobile device.
Other modules	Provides information on how to: • Install and use the Computer Telephony Integration (CTI) Plugin. • Provides information on how to work with Sage CRM Self Service.

Getting started

- About Sage CRM
- Logging on
- Changing your password
- Resetting your password
- Logging off
- Basic screen elements
- Tabs
- Navigating
- User preferences
- Finding information
- Onscreen coaching
- Getting help

About Sage CRM

Sage CRM is a single source for all your customer management needs. The system helps integrate marketing, sales, customer service, and customer information tools together in an entirely web-based package. Why is that so valuable?

Consider a typical office environment:

- Someone takes a phone call for a representative in a different department and forgets to tell them. Result? A lost opportunity.
- Your desk is littered with sticky notes reminding you to do things, but what do you have to do today?
- Sales and customer service both work with the same customers, but use separate systems—or none at all. No one has a clear idea what has been happening with that customer recently.
- Different sales teams are pursuing different agendas, so you can't see what is in the pipeline.
- A customer phones up, irate that his simple query hasn't been answered yet. But that should have been dealt with.

Sage CRM can bring it all together. With Sage CRM, you can complete the following tasks:

Task	Details
Manage contacts	• Focus on the information most relevant to the work you're doing right now. • Create and update customer information. • Create unlimited notes for special detail.
Manage your time	• Schedule reminders and appointments. • Assign, re-assign, and delegate activities. • Plan your workload and view your history of actions. • Manage your personal schedule. • Manage team workloads.
Manage documents	• Create letters, emails, and proposals using standard templates. • Store all documents as part of shared customer history. • Attach documents to communications. • Send emails and attachments using standard mail protocols. • Record your communication tasks.

Task	Details
Qualify leads	• Record and qualify raw lead data. • Use outbound call lists to work on multiple campaigns. • Generate leads from a telephone-based follow-up campaign. • Report on the success of a campaign.
Manage sales	• Track opportunities as they move through the sales cycle. • Record and maintain a history of all progress updates. • Assign opportunities and tasks to colleagues for team selling. • Maintain a communication history for each sales opportunity. • Report and analyze sales progress, forecasts, and lists.
Generate and view reports	• Produce account lists and pipeline overviews. • List customer cases. • Analyze performance and forecasts. • Monitor campaign success. • Run standard reports from your Web browser.
Provide customer service	• Log customer service calls. • Track customer service issues as they progress through to resolution. • Monitor Service Level Agreement adherence. • Publishing solutions and performing key word searches on a solutions database. • Escalate overdue cases.
Personalize your system	• Set up personalized dashboards. • Change the look and feel of the user interface. • Switch between your top five hot prospects. • Maintain an overview of your high priority customer service issues. • Set your own time zone and currency preferences.

Logging on

1. Open your web browser.
2. Enter the URL provided by your system administrator. This typically looks like *http://yourserver/yourapp*.
3. Enter the user name and password provided by your system administrator.
4. Click **Log On**.

Depending on your system configuration and user preference settings, Sage CRM opens on your default starting screen.

Changing your password

To change your password from the Logon page:

1. Select the **Change Password** check box.
2. Type your old password in the **Old Password** field.
3. Type the new password in the **New Password** and **Confirm Password** fields.
4. Click **Log On**.

To change your password once you're logged in:

1. Click **<My Profile> | Preferences**, then **Change Password**.
2. Enter your old password in **Old Password** and enter your new password in **New Password** and **Confirm Password**.
3. Click **Save**.

Your system administrator will inform you of the rules you need to follow when specifying a new password, for example how many and what types of characters you need to include in the password.

Resetting your password

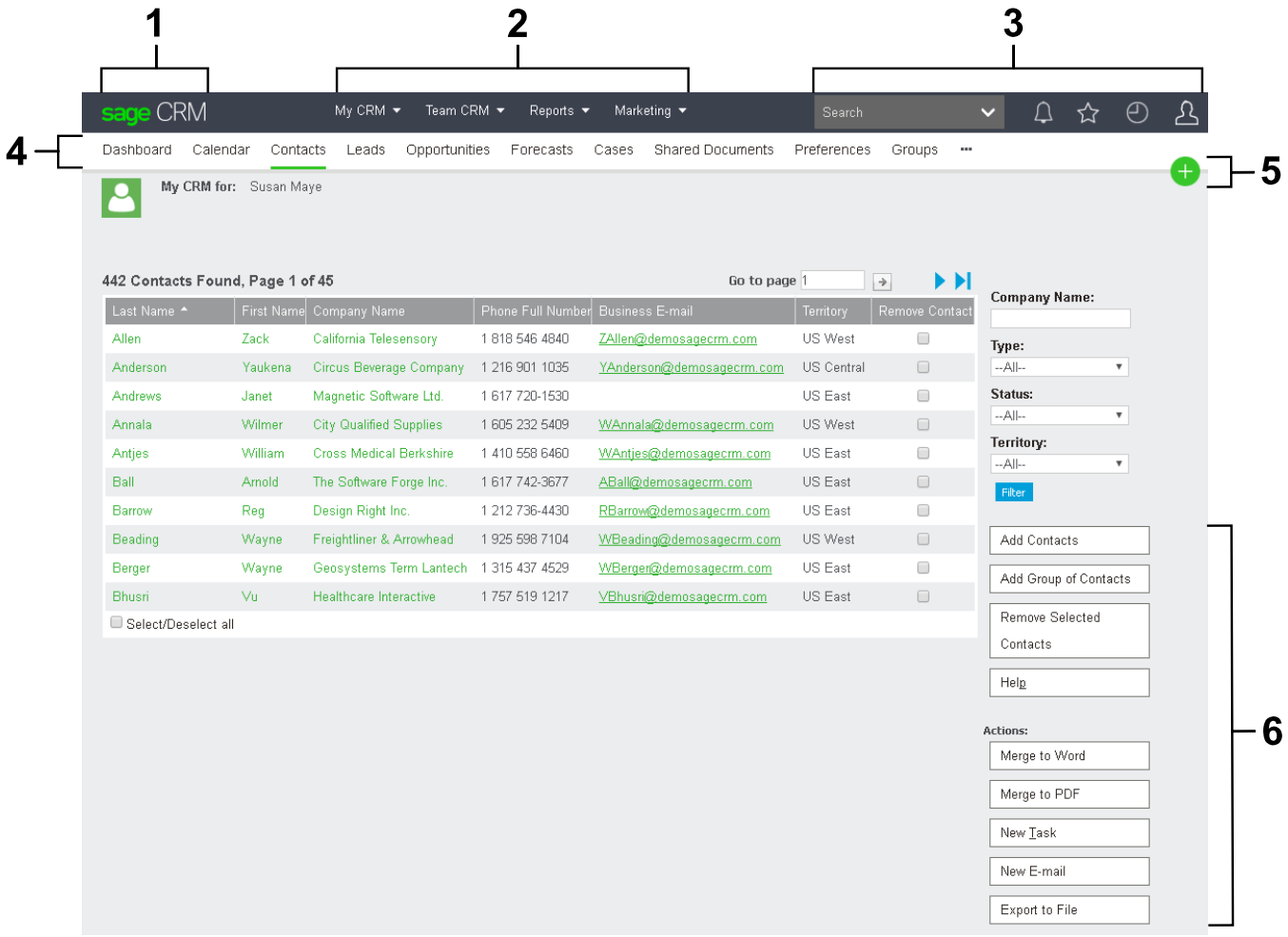
If you've forgotten your password and cannot log on, contact your system administrator who will reset it for you.

Logging off

To log off, click **<My Profile> | Log Off**.

You're automatically logged off if you close the browser or navigate to another site from the Sage CRM window.

Basic screen elements



A Sage CRM screen can be divided into a number of panels. Each panel groups related information for easier viewing. For example, the **Login and Session Preferences** panel on the Preferences screen groups all fields relating to your login and session settings.

You can use the following elements:

- **1** (Sage CRM logo). Click the logo to return to your default initial page from anywhere in Sage CRM. For more information on how to set your default initial page, see Configuring preferences.
- **2** (main menu). Allows you to access commonly used areas of Sage CRM, such as Dashboard, Calendar, and primary and secondary entities you work with. The main menu is always available regardless of your current Sage CRM context.
  In the user preferences, you can configure how the main menu is displayed: at the top of the screen or in a three-line menu (☰) on the left-hand side of the screen. For more information, see Configuring preferences.
  You can display or hide items in **My CRM**, **Team CRM**, and other drop-down lists. Note that displaying or hiding an item in the main menu affects the corresponding horizontal tab and vice versa. For more information, see Configuring tabs and main menu items.
- **3** (top bar). Provides quick access to search, your favorite records, active notifications, recently viewed records, and **<My Profile>** area. For more information, see Using top bar.
- **4** (horizontal tabs). Allow you to switch between the tabs available in the current Sage CRM context. You can selectively display or hide horizontal tabs. For more information, see Configuring tabs and main menu items.
- **5** (new). Allows you to create new entity records and communications (tasks, appointments, and emails). You can also use this button to export data to a number of formats.
  To add a new record or communication in the context of the current record, click ⊕ **| <Item>**.
  To export data to a Word document, click ⊕ **| Merge to Word**.
  To export data to a PDF document, click ⊕ **| Merge to PDF**.
- **6** (action buttons). Allow you to perform actions related to the current context. For example, you can edit data, create new items, change contact information, or progress sales opportunities.

Using top bar

> **Note:** For information about other elements of the Sage CRM user interface, see Basic screen elements.

The top bar provides quick access to search, your favorite records, active notifications, recently viewed records, and the **<My Profile>** area.

The top bar has the following elements:

Element	Description
Search box	Use **Search** to quickly search for records in four ways. • Using Quick Find: To perform a search across all entities at once, enter key terms in **Search**. • Using Find screens: To perform a search across a particular entity, click the **Search arrow** and click the entity type. • Using Advanced Find: To perform a complex database search across a particular entity, click the **Search arrow** and click **Advanced Find**. • Using Keyword Search: To search for keywords across specified primary entities, click the **Search arrow** and click **Keyword Search**. You can include wildcard characters to search for a variety of text and characters. **Note:** Quick Find is available in the Contemporary theme only.
(Notifications)	Click to display a list of active notifications. Notifications are usually reminders for tasks or appointments, or system alerts set up by you or your system administrator. • The number of notifications you have is displayed above the **Notifications** icon on the top bar. If the total number of notifications is greater than the number of notifications that are displayed on screen when you click the **Notifications** icon, you must dismiss one or more notifications to view the remaining notifications. • Click a notification in the list to open the record, appointment, or task on the main screen. • To dismiss a single notification reminder, click the bin icon beside the notification. • To snooze a single notification reminder, click the clock icon beside the notification and select a snooze duration. • To dismiss all notifications, click **Dismiss all** or **Snooze all**. • To close the list, click elsewhere on the screen.

Element	Description
(Favorites)	Click to display a list of your favorite Sage CRM records that you can access quickly. You can favorite a company, person, case, opportunity, lead, solution, communication, order, quote, or custom entity record. To add a record to this list, open the record and click the star icon beside the record page title. • Your favorite records are grouped by entity. Click the arrow in the entity header to expand or close the list of records for that entity. • Click a link in the list to open the record on the main screen. • To remove a record from the list, click the star icon beside the record in the list. • To close the list, click elsewhere on the screen. **Note:** Favorites is available in the Contemporary theme only.
(Recent)	Click to display a list of records you viewed recently. This list saves company, person, opportunity, quote, order, lead, case, solution, campaign, and group records. • Your recent records are grouped by entity. Click the arrow in the entity header to expand or close the list of records for that entity. • The Recent list displays a limit of 10 records per entity. • The default maximum number of records in the list is 40. To change the maximum number of records displayed in the list, contact your system administrator. • Click a record link in the list to open the record on the main screen. • Click an entity logo to open the entity's Find screen. • To clear the list, click **Clear** at the bottom of the list. • To close the list, click elsewhere on the screen.
(<My Profile>)	Click to view and edit your preferences, access the Administration area (if you have administrative rights in Sage CRM), open the Sage CRM Community web site, or log off Sage CRM.

Tabs

Tabs are like folder dividers. The information found in each tab is determined by the current context. For example, if you're looking at a Person record for Anita Chapman, click the **Communications** tab to display the most recent interactions your company has had with Ms. Chapman.

- My CRM and Team CRM tabs
- Company and Person tabs
- Configuring tabs and main menu items

My CRM and Team CRM tabs

This section discusses each tab within the context of **My CRM**.

> **Note:** Tabs that are displayed in the context of your **Team CRM** are similar to these tabs but the information relates to your team. There are no Calendar List, Forecasts, Outbound Calls, Preferences, Contacts, Dashboard, E-marketing, or Exchange tabs in Team CRM.

The **My CRM** tabs show work in progress specific to you. You can also set up your own system preferences from the **My CRM** tabs.

Tab	Displays
Dashboard	A customizable set of gadgets relating to you. For example, a list of companies from a personal saved search and a local RSS news feed.
Calendar	Your planned phone calls, meetings, and day-to-day tasks.
Calendar List	**My CRM** calendar items displayed as a list. For more information, see View calendar items as a list.
Leads	Unqualified queries about your business.
Opportunities	Your current sales pipeline.
Cases	Open customer service cases assigned to you.
Shared Documents	Corporate documents that you may need to access on a daily basis.
Groups	Create, modify, and save groups of people, companies, leads, cases, and opportunities.
Marketing	Manage and create marketing campaigns. View the status of campaign activities and run reports on opportunities generated through campaigns.
MailChimp Campaigns	Create and edit MailChimp email campaigns. View statistics about campaign emails so you can follow up with appropriate actions.
Reports	Run existing reports or create new reports if you've got rights to do so.

Tab	Displays
Contacts	Contacts in Sage CRM that you want to synchronize with MS Outlook (in Classic Outlook Integration or Exchange Integration).
Outbound Call Lists	Outbound call lists that you're working on. This tab isn't displayed by default. You can enable it in **<My Profile> | Preferences**.
Forecasts	Your quarterly sales forecasts. This tab isn't displayed by default. Your system administrator must give you access to this tab.
Solutions	Existing knowledge base items. This tab isn't displayed by default. You can enable it in **<My Profile> | Preferences**, if your system administrator has given you rights to access Solutions.
Preferences	System settings specific to your requirements. For example, your time zone, preferred currency, or the first page displayed when you log on.
Exchange Integration Logs	This tab must be enabled by your system administrator. Allows users enabled for Exchange Integration to view their own log files.
E-marketing User Profile	This tab is only available for E-marketing users. It lets them change their E-marketing contact details and email address.
... (ellipsis)	Opens a window that allows you to hide or display tabs. For example, if you rarely work with the **Opportunities** tab, you can hide it to save screen space. You can display the tab again if you change your mind. For more information, see Configuring tabs and main menu items

Company and Person tabs

These tabs are displayed in the context of a Company. The tabs available in the context of a Person are similar to these tabs but the information relates specifically to the person. The Person summary tab shows the core person details for all people you've rights to view.

Tab	Displays
Summary	Core company details, phone and email, principal address, and contact for all companies that you've rights to view.
Quick Look	Your recent history with this company. It lists the most recent communications, sales opportunities, and cases linked to the company.
Dashboard	Can display a management overview of the status of a customer account. For example, a chart of overdue cases, a list of high priority opportunities, or a snapshot of upcoming meetings.

Tab	Displays
Key Attributes	If Key Attribute Profiling has been set up for companies, you can record additional information about the company that's not captured by standard Company fields.
Marketing	Can be fully customized to your needs to track information, such as detailed company segmentation information.
Notes	General free text about the company . For example, a recent press release that indicates the company is due to merge with another company.
Communications	Phone calls, meetings, and day-to-day correspondence with this company.
Opportunities	Your sales pipeline, past and planned, for this company.
Cases	Information about your customer support cases.
People	People who have contact with at the company.
Addresses	Company addresses
Phone/Email	Phone and email details for the company.
Company Team	People in your organization who are involved in activities with this company.
Documents	References to all documents related to this company.
Relationships	Links between the company and related companies, people, opportunities, and other information, grouped together by relationship type. For example, a list of sub-contractors working with the company.
... (ellipsis)	Opens a window that allows you to hide or display tabs. For example, if you rarely work with the **Opportunities** tab, you can hide it to save screen space. You can display the tab again if you change your mind. For more information, see Configuring tabs and main menu items

Configuring tabs and main menu items

You can selectively display or hide horizontal tabs and their corresponding main menu items.

Also you can save screen space by moving specific tabs to the **More** drop-down list. **More** is displayed beside the rightmost horizontal tab. This drop-down list is useful for the tabs that you use rarely but which you don't want to hide completely.

1. Do one of the following:
    - Go to **My CRM | Configure**.
    - Click the ellipsis icon (**...**) beside the rightmost horizontal tab.

2. In the window that opens, select or clear the check boxes in the following columns:
    - **Display Tab**. Display or hide horizontal tabs and their corresponding main menu items.
    - **Add to More**. Select the tabs you want to move to the **More** drop-down list.
3. Click **Save**.

When using the **More** drop-down list, consider the following:

- **More** is only available in **My CRM** area, including standard and custom entities.
- **More** appears only after you add at least one tab to it.
- **More** is displayed beside the rightmost horizontal tab.
- **More** is not displayed in the main menu, so when you add a horizontal tab to **More**, its corresponding main menu item becomes hidden.

For more information about Sage CRM user interface elements, see Basic screen elements.

Navigating

Sage CRM is web based. You can navigate it the same way that you navigate a standard website.

> **Note:** Opening Sage CRM items in another window or tab is not supported in Sage CRM.

In addition to point-and-click, you can use the following to speed up your navigation:

- Tab key
- Hot keys
- Go arrows
- Search Select Advanced
- Required fields

Tab key

When entering or editing information, use the **Tab** key to move quickly from field to field. To move back to the previous field, use **Shift + Tab**.

Hot keys

You can navigate Sage CRM without using a mouse. You can use keyboard hot keys instead. The hot keys that are available depend on the Sage CRM page that's open.

To identify the availability of a hot key, check that a letter on the action button name is underlined. In Internet Explorer, press **Alt** and the letter that's underlined to perform the action. For example, if **T** is underlined on **New Task**, press **Alt** + **T** to create a new task.

You can use the following hot keys:

Action	Internet Explorer	Firefox	Chrome	Safari
Create a new appointment from the **Communications** tab.	**Alt** + **A**	**Alt** + **Shift** + **A**, and then press **Enter**	**Alt** + **Shift** + **A**	**Alt** + **Ctrl** + **A**
Insert today's date into a date field.	**Alt** + **N**	**Alt** + **Shift** + **N**, and then press **Enter**	**Alt** + **Shift** + **N**	**Alt** + **Ctrl** + **N**
Create a new task from the **Communications** tab.	**Alt** + **T**	**Alt** + **Shift** + **T**, and then press **Enter**	**Alt** + **Shift** + **T**	**Alt** + **Ctrl** + **T**
Create a new email from the **Communication** tab.	**Alt** + **E**	**Alt** + **Shift** + **E**, and then press **Enter**	**Alt** + **Shift** + **E**	**Alt** + **Ctrl** + **E**
Exit from some screens.	**Alt** + **C**	**Alt** + **Shift** + **C**, and then press **Enter**	**Alt** + **Shift** + **C**	**Alt** + **Ctrl** + **C**
Save records.	**Alt** + **S**	**Alt** + **Shift** + **S**, and then press **Enter**	**Alt** + **Shift** + **S**	**Alt** + **Ctrl** + **S**
Open drop-down lists.	**Alt** + ↓	**Alt** + **Shift** + ↓, and then press **Enter**	**Alt** + **Shift** + ↓	**Alt** + **Ctrl** + ↓

Go arrows

Button	Description
	Opens the summary screen of the related record.
	Opens the specified user's My CRM area from the context area of the screen.

Search Select Advanced

The **Search Select Advanced** button ( ) indicates a Search Select Advanced field. Use this button to search for records. For example, this button is displayed next to the **Wave Activity** field on the New Lead page.

Use the **Search Select Advanced** button to search for records in Sage CRM. Type a few letters in the text box next to the button, click the magnifying glass, and search matches are displayed beneath the field:

To fill in the text box, click a matching record. If only one match is found, the text box is automatically filled in. Alternatively, click the down arrow beside the magnifying glass to search using a standard Search screen or to clear the current search.

Once you've linked a record to the Search Select Advanced field, you can open the summary page of that record:

- To display the record's Summary page within the context of the entity, hold down **Ctrl**, and click the record.
- To display the record's Summary page in a pop-up window, double-click the record.

Required fields

When you add or edit information in Sage CRM, keep in mind that fields marked with a blue asterisk are required, and must be filled in order to save your changes.

User preferences

User preferences let you control how information is displayed. For example, if you work in the customer service team, you're probably most interested in the status of existing cases. You can change your user preferences so your current open cases are displayed whenever you log on to Sage CRM.

On the User Preferences page, you can also change your password. For more information, see Changing your password.

If necessary, you can create, edit, or delete your email signature. For more information, see Managing your email signature.

You can also install plugins enabled by your system administrator. For more information, see About Classic Outlook Integration and About Lite Outlook Integration.

Configuring preferences

1. Click **<My Profile> | Preferences**.
2. On the page that opens, click **Change**.
3. Make your changes to the user preferences. For more information, see Preferences UI reference.
4. Click **Save**.

To return to the default preferences, click **Set To System Defaults**.

Preferences UI reference

When configuring user preferences, you can use the following panels and action buttons:

- Login and Session Preferences panel
- Date/Time Preferences panel
- Number Preferences panel
- Reminder Preferences panel
- Preferences action buttons

Login and Session Preferences panel

Field	Description
Log Me In To	Sets the default initial page to display when you log on to Sage CRM or when you click the Sage CRM logo in the top left corner of the Sage CRM window..
Show Leads Pipeline	Allows you to show or hide the leads pipeline on the **Leads** tab within **My CRM** and **Team CRM**.

Field	Description
Email Screen Position	Sets how to display the New Email screen. Possible values: • **Normal**. Displays the screen in the current window. • **Popup**. Displays the screen in a new popup window. **Note:** When you're working with Sage CRM in Outlook, the New Email screen is always displayed in a new popup window regardless of the value set in this field.
On-screen Coaching	Enables or disables on-screen coaching. Possible values. • **On**. Enables on-screen coaching. • **Off**. Disables on-screen coaching. • **Minimized**. Enables on-screen coaching and displays it minimized until you click **Maximize On-screen Coaching**. • **Customized**. Enables on-screen coaching and allows you to minimize or maximize it on a screen-by-screen basis.
Display three-line menu	Allows you to select how the main menu is displayed. Possible values: • **Always**. Moves all main menu items, both standard and custom, to the three-line menu (☰) located in the top left corner of the Sage CRM screen. Use this value when the main menu doesn't fit in the Sage CRM screen because it includes many items or item names are long. • **Automatically**. Moves all main menu items to the three-line menu (☰) on narrow screens only. Otherwise, the main menu is displayed at the top of the screen.
CSV File Export Delimiter	Sets the delimiter to use in Comma-separated Values (CSV) files. The delimiter applies when you: • Export data from Sage CRM to a CSV file. • Upload data from a CSV file to Sage CRM. In this case, the CSV file must use the delimiter you specify in this field.
Default Tablet Version	Sets how to display Sage CRM when you view it on a tablet. Possible values: • **Desktop Version**. Displays full desktop version of Sage CRM. • **Tablet Version**. Displays Sage CRM using the tablet theme.

Field	Description
Empty Recent List For Each Session	Allows you to clean up or keep records in the recent list ( ) provided in the top bar. Possible values: • **Yes**. Cleans up the recent list when you log off. • **No**. Keeps records in the recent list when you log off, so that you can use them after next logon.
Show Solutions In My CRM	Allows you to display or hide the **Solutions** tab and menu item in the **My CRM** main menu. **Note:** This field applies only if the system administrator has given you rights to view Solutions.
Show Opportunities Pipeline	Allows you to display or hide the opportunities pipeline above the list of opportunities in **My CRM | Opportunities** and **Team CRM | Opportunities**.
Line Item Screen Position	Allows you to display the Line Item screen in Popup or Split view.
Default Screen For Company	Sets the initial tab to display when you open a Company record. You can select one of the following tabs: • **Summary** • **Interactive Dashboard**
Pop Out List Activation By	Sets a method to open pop-out lists. Possible values: • **Hover**. Hover over a menu button to open the pop-up list. • **Click**. Right-click a menu button to open the pop-up list.
Show Outbound Calls In My CRM	Allows you to display or hide the **Outbound Call Lists** tab and menu item in the **My CRM** main menu.
Show Cases Pipeline	Allows you to display or hide the cases pipeline above the list of opportunities in **My CRM | Cases** and **Team CRM | Cases**.
Report Print Preview Default Page size	Sets the default page size used on the Report Display Options page for reports in PDF format. Possible values: • **Letter** • **A4**

Field	Description
Default Email Template	Sets the default email template. The template is used when you create a new email in Sage CRM. You can use this field to disable or reenable your email signature, if it exists. For more information, see Managing your email signature.
Currency	Sets the currency to use in Sage CRM.
Grid Size	Sets the default maximum length of lists and grids on a page.
Report Print Preview Default Orientation	Sets the default page orientation (portrait or landscape) used on the Report Display Options page for producing a report in PDF format.
Preferred Theme	Select the theme you want to use when you log on to Sage CRM. A theme defines how the Sage CRM user interface looks. It is a combination of content layouts, icons, and user interface colors. Themes don't apply to User Help, System Administrator Help, and Self Service. **Note:** This field is available only if Sage CRM 2018 R3 was upgraded from a previous version where existed any other themes except **Contemporary**. For more information, contact your system administrator.
Default Email Address	Allows you to select the default email address to add to the **From** field on the New Email screen. This field applies only if you can send emails from two or more accounts.
Full Menu in Outlook	Displays full or short Sage CRM menu in Outlook 2007. This field applies only when Classic Outlook Integration is enabled.

Date/Time Preferences panel

Field	Description
Calendar View	Sets the initial calendar view to display when you open the calendar. Possible values: • **Agenda** • **Day** • **Month** • **Tasks** • **Week** • **Work Week** For more information about calendar views, see About calendar.
Calendar Start Time	Specifies the time when your business day starts. Applies to the calendar and Meeting Planner.
Calendar End Time	Specifies the time when your business day ends. Applies to the calendar and Meeting Planner.
My Week Starts On	Specifies the first day of your work week displayed in the calendar. A work week always includes five days, including Saturday and Sunday.
Date Format	Defines the format in which to display dates in Sage CRM. This field doesn't apply if you use Sage CRM on a mobile device. To configure date format on a mobile device, use the mobile device settings.
Use AM/PM	Defines the format in which to display times in Sage CRM. Possible values: • **Yes**. Displays times in 12-hour format with AM/PM. • **No**. Displays times in 24-hour format.
Time Zone	Defines the time zone for which to display dates and times in Sage CRM. The time zone you select must match your computer settings.

Number Preferences panel

Field	Description
Decimal Point	Sets the decimal point. For example, a period (.) or a comma (,).
Decimal Places	Sets the number of decimal places to be displayed. For example, *2*. **Note:** The maximum number of decimal places is 6.
Thousand Separator	Set the thousand separator. For example, a period (.) or a comma (,).

Reminder Preferences panel

Field	Description
Default Targets For High Priority Reminder Messages	Specifies how to send reminders for tasks and appointments with high priority. Select methods from the list. To select multiple methods, hold down **Ctrl** and click the methods you want to select. **Note:** This field applies to tasks and appointments for which you have selected **Send Reminder Message**. For more information, see Managing tasks and Managing appointments.
Default Targets For Normal Priority Reminder Messages	Specifies how to send reminders for tasks and appointments with normal priority. Select methods from the list. To select multiple methods, hold down **Ctrl** and click the methods you want to select. **Note:** This field applies to tasks and appointments for which you have selected **Send Reminder Message**. For more information, see Managing tasks and Managing appointments.
Default Targets For Low Priority Reminder Messages	Specifies how to send reminders for tasks and appointments with low priority. Select methods from the list. To select multiple methods, hold down **Ctrl** and click the methods you want to select. **Note:** This field applies to tasks and appointments for which you have selected **Send Reminder Message**. For more information, see Managing tasks and Managing appointments.

Preferences action buttons

Action button	Description
Create Email Signature	Click to create your default email signature. This button is available only if you don't have an email signature. For more information, see Creating your email signature.
Edit Email Signature	Click to edit or delete your existing default email signature. For more information, see Editing your email signature and Deleting your email signature.
Install Classic Outlook Integration	Installs the Classic Outlook Plugin on your computer. For more information, see About Classic Outlook Integration. This button is available only if your system administrator has enabled the **Classic Outlook Integration** and/or **Lite Outlook Integration**.
Install Lite Outlook Integration	Installs the Lite Outlook Plugin on your computer. For more information, see About Lite Outlook Integration. This button is available only if your system administrator has enabled the **Classic Outlook Integration** and/or **Lite Outlook Integration**.

Finding information

- Using Quick Find
- Using Find screens
- Using Advanced Find
- Using Keyword Search
- Working with saved searches
- Working with lists

Using Quick Find

You can enter key terms in **Search** on the top bar to search all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once.

For example, a search for *european software services* returns all records containing the words *european* + *software* + *services* in any text field, email field, or URL field. The words can appear in any order within a record and across more than one field.

You can also search for records with particular phone numbers. To do so, enter the phone number you want to find or its part. Do not enter any words.

Quick Find is particularly useful for users who need to access Sage CRM information quickly. For example, a customer support user who's on the phone to a customer and needs to reference a specific case record.

- Press **Ctrl** + **s** to jump to **Search**.
- The search starts after you enter two letters in **Search**. Each additional character that you enter refines the search results.
- The maximum number of returned records depends on the settings configured by your system administrator.
- If all description fields on a returned record are blank, **<No value set>** is displayed in the search results. You can still click the record link to open the summary screen of the record.
- Use the up and down arrows and **Enter** to select a returned record.
- When you click a returned record link, the summary screen of that record is displayed.

Note: Quick Find is available in the Contemporary theme only.

Using Find screens

You can search for an entity record using criteria on the Find screen.

1. On the top bar, click the **Search arrow** and click **<Entity>**.
2. Click **Clear** to clear your last search from the Find screen.
3. Enter search criteria. You can combine any number of criteria to narrow your search.
    - To search for keywords across specified primary entities, enter them in **Keyword Search**. You can include wildcard characters in the search. For more information, see Using Keyword Search.
    - You can search by numeric value if your system administrator has added numeric fields to the screen. For example, if a custom field called **Opportunity: Total Quoted Price** is added to the Opportunity Find screen, you could search for opportunities with a total quoted price over $10,000. Alternatively, you can use Advanced Find to search for a numeric range. For example, you can create an Advanced Find based on quotes that searches for quotes with a Net Amount between two values. For more information, see Using Advanced Find.
    - You can search by date if your system administrator has added numeric fields to the screen. For example, you could search for all leads created during a specific time period.
    - To use a wild card search, enter *%* before the value in a field. The returned matches contain this value. For example, to return all companies with *software* in the company name, enter *%software* in **Company Name**.
      To search for field values that contain the percent sign (%), use pipe (|) to specify that the

percent sign is not a search operator. For example, to return all companies with % in the company name, enter %|% in **Company Name**.

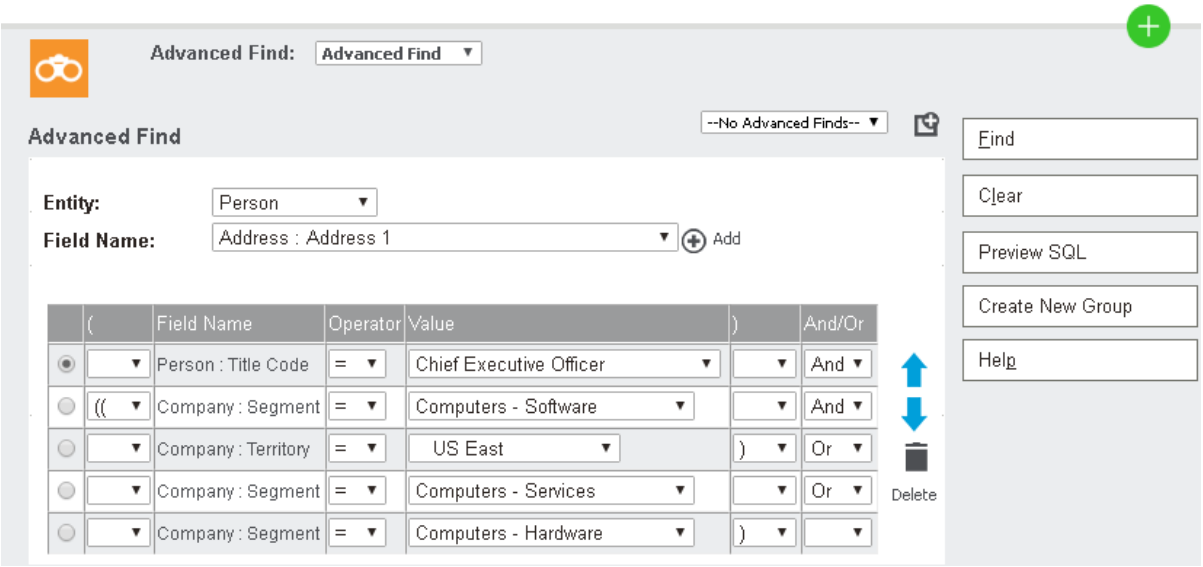
4. Click **Find**. A list of search results is displayed. To open a record, click the link. Click tabs to view specific information about the record. For more information, see Company and Person tabs.
5. You can create a group to save the search results. For more information, see Creating a group based on search results.
6. You can perform actions on the search results. For more information, see Performing actions on search lists.

> **Tip:** Click the **Recent** icon on the top bar to display a list of records you viewed recently.

Using Advanced Find

You can use Advanced Find to perform complex database searches across cases, communications, companies, leads, opportunities, orders, people, quotes, and solutions. You can create enhanced searches based on a WHERE clause, and you can extend the selection criteria using AND and OR clauses.

1. On the top bar, click the **Search arrow** and click **Advanced Find**.
2. Click **Clear** to clear your last search from this page.
3. Chose the entity on which you'll perform the search from **Entity**.
4. Select the first field in your search criteria from **Field Name** and click **Add**. Repeat this step to add other fields to your search.
5. Select the radio button beside a field name and use the arrows to reposition it if necessary.
6. Choose the operators, values, and And/Or clauses for each field. Use opening and closing brackets to create more complex criteria. For example, to create an Advanced Find search for all CEOs working in either computer software in the US East territory, or in computer hardware or computer Services, use the fields, operators, values, and And/Or clauses shown in the screenshot below.



Tip: Use And/Or clauses to search for a value in a multi-select field.

7. Click **Preview SQL** to review the SQL query behind your search.
8. Click **Find**. A list of all people matching your search criteria is displayed.
9. Save your criteria as soon as the search results are displayed. If you log off before doing so, the results are not saved. For more information, see Creating and updating a saved search.
    - You can create a group from the search results. For more information, see Creating a group based on search results.
    - You can perform actions on the search results. For more information, see Performing actions on search lists.

Using Keyword Search

You can use Keyword Search to search across all text fields on a specific entity and entities associated with it. For example, if you perform a Keyword Search on cases, the search is also performed on associated companies, people, addresses, and progress notes.

Note: You can perform a Keyword Search on companies, people, cases, opportunities, leads, communications, orders, and quotes.

Keyword Search uses an *any words* search technique. This returns records containing all words listed in a search term if the words appear in the record text fields or in the text fields of any associated entity record specified in the Keyword Search view. For technical information about Keyword Search views, see *Creating a view for keyword search* in the *System Administrator Guide*. For example, a search for *european software services* returns all records containing the words *european* + *software* + *services* in any text field. These words can appear in any order within a record and across more than one text field. If the search term is not

enclosed in quotation marks, matching records are picked up even where there are words inserted between the search term words within a record. If quotation marks are used, only records containing the exact phrase are returned.

You can use a Keyword Search on its own. Alternatively, you can use a Keyword Search with other criteria on an entity Find screen to further refine the search results. If you enter a Keyword Search term and a value for a Find screen field, an initial search is performed using the Keyword Search term. The search results are then filtered using the values in the Find fields. For example, you can perform a Keyword Search using the search term *Murphy* and refine this search using **Ireland** from **Territory** on the Find Person screen. This means that a person Keyword Search is carried out on the term *Murphy* but only those records with a matching Ireland territory are returned in the search list.

By default, the number of returned records is limited to 200. So your initial Keyword Search can return no more than 200 records, even if more matches exist, and then subsequent searches are based on those 200 records only. In some cases, this mean less records are returned than expected.

1. To perform a Keyword Search, do the following:
    a. On the top bar, click the **Search arrow** and click **Keyword Search**.
    b. Enter your search term in **What would you like to search for?**. When performing a Keyword Search, you might know part of the search term. For example, you may have part of a company name, or you know that you're looking for someone called either Smith or Smyth, or you might know only the first few digits of a telephone number. See the table below for special characters that can help you narrow your search results in these circumstances.
    c. Select an entity checkbox to perform your search on one or more entities. Alternatively, select **Select All** to search all primary entities. If you do not select any checkbox, no records are returned.
2. To perform a Keyword Search combined with criteria from a standard **Find** screen, do the following:
    a. On the top bar, click the **Search arrow** and click **<Entity>**.
    b. Enter your search term in **Keyword Search**. See the table below for special characters that can help you narrow your search results.
    c. Enter search criteria in the **Find** screen fields.
3. Click **Find**. A list of search results is displayed. To open a record, click the link. If the list of search results is very long, click **View All** to view the full search results.

Character	Usage
* %	* or % perform the same action. They can be placed at any position in a word and match any number of characters. For example, **ope** matches *Europe* and *open*. Ensure you leave a leave a space between words when using these characters with multi-word search terms.
Quotation marks	To search for a phrase, place it in quotation marks. For example, a search for *"software services"* returns all records containing the phrase *software services*. Punctuation marks are treated as blank space. For example, *"(1451)4579937"* searches for two text strings; 1451 and 4579937.
?	Place ? at any position in a word to match any single character. For example, *Americ?* matches *America* but not *American*, while *Americ??* returns all words containing *Americ* and two characters after it.
=	Place *A*= at any position in a word to match any single digit. For example, *B*== matches B12 but not B123.
#	Place # at the start of a word to return all words that start with the same letter and sound like the word you're searching for. For example, *#smith* returns smith, smithe, and smythe. # can sometimes be over-inclusive. For example, *#smith* might also return smart, smoke, and smell.
~~	Place ~~ between the upper and lower bounds of a numeric range to search within that range. For example, *10~~20* returns all numbers between 10 and 20. A numeric range search works with positive numbers only. Decimal points and commas are treated as spaces, while minus signs are ignored.
+	Place + in front of a word that you want to include in your search. For example, *software +services* returns records containing *software* that are associated with *services*.
-	Place - in front of a word that you want to exclude from your search. For example, *software -services* returns any records containing *software* that are not associated with *services*.

Working with saved searches

- Using a saved search
- Creating and updating a saved search
- Deleting a saved search

Using a saved search

A saved search provides a shortcut to relevant information and eliminates the need to reenter search criteria. There are several predefined saved searches available on Find screens. For example, on the

Company Find screen, the My Companies saved search returns a list of companies assigned to you. Similarly, on the Case Find screen, the My Cases in Progress saved search returns active cases currently assigned to you. You can also create and use your own saved searches. For more information, see Creating and updating a saved search.

A saved search is dynamic so each time you run it, it includes any new Sage CRM records that meet the search criteria.

1. On the top bar, click the **Search arrow** and click **<Entity>** or **Advanced Find**.
2. Select a saved search from **Saved Search**. The list of search results is displayed.
3. You can create a group to save the search results. For more information, see Creating a group based on search results.
4. You can perform actions on the saved search results. For more information, see Performing actions on search lists

Creating and updating a saved search

You can create a saved search using search criteria that you frequently use. You can create an unlimited number of saved searches for companies, people, opportunities, orders, quotes, cases, solutions, leads, or communications.

1. On the top bar, click the **Search arrow** and click **<Entity>** or **Advanced Find.**
2. To create a new saved search,
    a. Enter your search criteria and click **Find**.
    b. Click the **New Search** icon ( ).
    c. Enter the name of the new saved search.
3. To update an existing saved search,
    a. Select the search from **Saved Search**.
    b. Enter your new search criteria and click **Find**.
    c. Click the **Update Search** icon ( ) and change the name of the saved se arch if required.
4. If you are a system administrator or an Info Manager, select **Available to all Users** to share the saved search with all users. If you are not a system administrator or an Info Manager, this checkbox is not displayed and the saved search is available to you only.
5. Click **Save**.
6. You add the saved search to your dashboard to make it even more accessible. For more information, see Gadgets.

Deleting a saved search

1. On the top bar, click the **Search arrow** and click **<Entity>**.
2. Select the search from **Saved Search**.

3. Click the **Delete Search** ( ) icon. You can delete a saved search that you have created. A system administrator or Info Manager can delete shared saved searches.
4. Click **OK**.

Working with lists

You can perform actions on search result lists and sort lists suit your requirements.

- Performing actions on search lists
- Counting records in a list
- Filtering records in a list
- Sorting records in a list
- Setting the size of the search results list

Performing actions on search lists

You can perform actions on all types of search lists — lists returned by a standard search, lists returned by Advanced Find, lists returned by Keyword Search, lists based on saved searches, or the My CRM Contacts list.

You can do the following:

Action	Your steps
Create a merged document for each record in your list.	Click **Merge to Word** or **Merge to PDF**. **Merge to Word** is displayed only if your system administrator has enabled this option.
Create a task with the same details for each record in your list. For example, if your search returns two company records, click **New Task** to create a distinct task for each company that's linked to the primary person record for the company.	Click **New Task**.
Create an email with merge fields for each record in your list.	Click **New Email**. Your user account must have sufficient rights to perform this task.
Export your list of records to a spreadsheet or text file.	Click **Export to File**. Your user account must have sufficient rights to perform this task.

Counting records in a list

You can view the number of records in a list to give you an idea of the total length of long lists. A record counter is displayed in the top left-hand corner of most lists. It also shows the page number out of the total

number of pages containing records. To see how many records are contained on the next page, hover over the right-pointing arrow.

Filtering records in a list

You can change how lists are displayed. This example narrows down a list of communications to show only Pending communications.

1. Open a Company record and click the **Communications** tab.
2. To view only the pending communications, select **Pending** from **Status** and click **Filter**.The list of communications is restricted to those whose status is **Pending**. This filter applies to all Company Communications lists until changed or until you log out.

Sorting records in a list

When viewing a list in Sage CRM, you can change the order in which the records are sorted. This example shows how to change the sort order for a list of communications.

1. Open a Company record and click the **Communications** tab.

   In the list of communications, the triangle next to the column heading indicates the column by which the records are currently sorted:

   - Indicates that records are sorted in the ascending order.
   - Indicates that records are sorted in the descending order.
2. You can do the following:
   - To change the sort order from ascending to descending or vice versa, click the column heading beside which the triangle is displayed.
   - To sort records by another column, click the column heading.

Setting the size of the search results list

You can specify the default maximum length of lists and grids on any screen.

1. Click **<My Profile> | Preferences**.
2. Click **Change**.
3. Select the default maximum length from **Grid Size**.
4. Click **Save**.

Onscreen coaching

Onscreen coaching can be displayed in a panel on Sage CRM screens. This panel provides contextual information and general tips.

Your system administrator can activate and deactivate onscreen coaching.

- To set onscreen coaching display preferences, go to **<My Profile> | Preferences**. For more information, see User preferences.
- To turn onscreen coaching off, click the cross button (**x**). If you close a coaching panel, it remains turned off the next time you log on. To turn it back on, go to **<My Profile> | Preferences**.
- To show or hide the coaching panel for a particular screen, click the **Maximize/Minimize** button. If you hide the coaching panel for a screen, it remains hidden the next time you log on.

For information about setting up onscreen coaching, see the *System Administrator Help*.

Getting help

- Click **Help** on the current Sage CRM screen to display contextual information.
- Go to the Sage CRM Help Center for additional help and guides.
- You can subscribe to the Sage CRM Community to access blog articles and user forums.
- Go to the Sage CRM Video channel to view feature overview and tutorial videos. Most videos available are in English. Some French, German and Spanish videos are also available.

Contacts

- Customer information
- Calendar
- Email
- Exchange Integration
- Classic Outlook Integration
- Lite Outlook Integration
- Documents

Customer information

- Recording consent that you may send marketing materials
- Methods to add new information
- Adding a new company
- Validation errors
- Territory management
- Updating an existing company
- Working with relationships
- Working with notes
- Building a company team
- Adding a person without a company link
- Reassigning a person to a company
- Working with duplicates
- Deleting company or person records
- Viewing contact history

Recording consent that you may send marketing materials

You can use Sage CRM to record if a person or lead has agreed to receive marketing materials from your company. You may need to do so to comply with the data privacy regulations in your country.

Each person and lead record in Sage CRM can have a **Consent** tab. On this tab, you can create one or multiple *consent records*. A consent record allows you to register if you have consent from the person or lead to receive marketing materials, what kind of marketing materials you can send to them, how you can send these materials, and when the granted consent expires.

> **Note:** You can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For details, see Sending a consent email to a group.

In this section:

- Creating a consent record
- Viewing a consent record

- Updating a consent record
- Deleting a consent record
- Sending a consent email to a person or lead
- Consent fields

Creating a consent record

1. Find and open the person or lead whose consent you want to request.
2. Click the **Consent** tab, and then click **New**.
3. Configure fields on the **Consent** tab. For more information, see Consent fields.
4. Click **Save**.

   Now you need to get in touch with the person or lead, ask them if they agree to receive marketing materials, and update the information on the **Consent** tab based on their answer.

   You can request consent from a person or lead automatically by sending a consent email. For more information, see Sending a consent email to a person or lead.

   Also you can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For details, see Sending a consent email to a group.

Viewing a consent record

1. Find and open the person or lead whose consent record you want to view.
2. Click the **Consent** tab.
3. Open the consent record you want to view by clicking the value in the **Contact Via** column.

   You can obtain consent from a person or lead automatically by sending a consent email. For more information, see Sending a consent email to a person or lead.

   Also you can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For details, see Sending a consent email to a group.

Updating a consent record

1. Find and open the person or lead whose consent record you want to update.
2. Click the **Consent** tab.
3. Open the consent record you want to update by clicking the value in the **Contact Via** column.
4. Click **Change** and update the values in the consent fields. For more information, see Consent fields.

5. Click **Save**.

   You can update a consent record for a person or lead automatically by sending a consent email. For more information, see Sending a consent email to a person or lead.

   Also you can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For details, see Sending a consent email to a group.

Deleting a consent record

Note: We recommend keeping consent records because they provide an audit trail.

1. Find and open the person or lead whose consent record you want to delete.
2. Click the **Consent** tab.
3. Open the consent record you want to delete by clicking the value in the **Contact Via** column.
4. Click **Delete**, and then click **Confirm Delete**.

Sending a consent email to a person or lead

You can automatically update the status of a consent record for a person or lead. To do so, you need to send a consent email. Your recipient can use the links in the email to either agree to receive marketing materials, or decline your request. When a recipient clicks a link in the consent email, the status of the corresponding consent record is automatically updated in Sage CRM.

To send a consent email to a person or lead:

1. Find and open the person or lead to whom you want to send a consent email.
2. Create or open a consent record. For details, see
   - Creating a consent record
   - Viewing a consent record
3. Click **New Consent Email**.
4. In the email window that opens, from **Template**, select the **Person Consent Email** or **Lead Consent Email**.
5. Edit the email body if necessary.

   By default, the email body includes two hyperlinks containing the following variables:

   - `%CRMSubmitConsentLink%` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Consented**.
   - `%CRMSubmitConsentLink%&status=1` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Withdrawn**.

   When you send a consent email, the variables are transformed into URLs unique to the recipient.

> **Warning:** Do not delete these hyperlinks or change the variables, because they are used to update the status of the corresponding consent record in Sage CRM.

6. Complete the remaining email fields. For details, see Sending an email.
7. Click **Send Email**.

Consent fields

When creating or updating a consent record, you can use the following fields:

Field	Description
Created	Date and time when the consent was created.
Contact via	How you would like to contact the person or lead. Possible values: • **Email** • **Phone call** • **SMS** • **Post**
Contact purpose	What kind of marketing materials you want to send to the person or lead. Possible values: • **E-marketing materials** • **Sales offers** • **Third-party offers**
Requested	Date and time when you requested consent. When you send a consent email, this field is populated automatically.
Valid until	Date and time when the granted consent expires.
Campaign	Marketing campaign to which the consent record relates.

Field	Description
Status	Current consent status. Possible values: • **New**. Automatically assigned when you create a new consent record. • **Requested**. Indicates that you have requested the person or lead to provide their consent and are awaiting their reply. • **Consented**. Indicates that the person or lead has given their consent to receive marketing materials from you. • **Withdrawn**. Indicates that the person or lead has declined your request or withdrawn their consent. **Note:** When you send a consent email, the **Status** field is updated automatically. For more information, see Sending a consent email to a person or lead.

Methods to add new information

To add new information, you can use one of the following methods:

- Click ⊕ in the top right corner of the screen. Then, select the type of record you want to add, for example, Person, Case, or Opportunity.
- Use the action buttons on the right-hand side of the screen. These are available when you already have a folder of information open.

Whichever method you use, the system is smart enough to add in the context information if it is available. For example, if you already have the company Design Right Inc open and you add a new person, they will automatically be "filed" with Design Right when you save the person details.

Note: You can use Sage CRM to record if a person or lead has given you their consent to collect and use their personal data. You may need to do so to comply with the data privacy regulations in your country. For more information, see Recording consent that you may send marketing materials.

Adding a new company

1. Click **New | New Company.**
2. Type the first few letters of the company name, and click **Enter Company Details**. The system

searches for possible duplicate company names.

For more information on deduplication, please refer to Preventing duplicate entries. If no potential duplicate company is found, the **New Company** page is displayed.

3. Fill in the details for the new Company record.
   Your system administrator determines the minimum amount of details you must enter. You can use the following fields:
   - Company fields
   - Address fields
   - Phone and email fields
   - Person fields
   - Person phone details fields
   - Person email fields
   - Adding a company with multiple sites
4. Click **Save**. You may need to scroll back to the top of the page to do this.

Company fields

Field	Description
Company Name	Name of the company
Type	Type of relationship to your company. For example, Prospect, Supplier, or Customer.
SLA	Service Level Agreement that the company has signed up for. For more information, see Cases. The SLA selected here will be the default SLA for any cases you create relating to the company.
Website	The company URL
Status	Current status, for example, Active or Inactive.
Segment	Industry sector, for example, Retail or Financial Services.
Employees	Number of people employed by the company.
Revenue	Company revenue. The standard drop-down values for this field are in USD ($).
Source	How contact with the company was initiated. For example, Tradeshow or Customer Referral.
Territory	Security territory of the company. For more information, see Territory management.

Field	Description
Account Manager	Person from your organization responsible for the relationship with this company.
Mail Restriction	A flag to allow or prevent the company being added to mailing lists.
Opt out of E-marketing Communications	This flag is automatically set if the email address associated with the company has opted out of all E-marketing communications received via Sage CRM's integrated E-marketing (Swiftpage). The user can manually check or clear the option, however this has no impact on E-marketing emails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing email).

Address fields

Field	Description
Address 1	First line of the address
Address 2	Second line of the address
Address 3	Third line of the address
Address 4	Fourth line of the address
City	City the company is based in
State	State or county
Zip Code	Zip or postal code of the address
Country	Country the company is based in
Type	Type of address. You can check one or more type.

Phone and email fields

The conventions for entering country and area codes and voice and data numbers are determined by your system administrator. They may vary from those shown here.

Field	Description
Business	Main switchboard phone number
Fax	Main fax number
ISDN	Integrated Services Digital Network number

Field	Description
Modem	Modem number
Toll Free	Toll free number
Info	General information email address
Sales	Sales email address
Support	Support email address

Person fields

Field	Description
Last Name	Person's family name
First	First name
Salutation	Salutation. For example, Mr, Dr, or Miss.
Middle	Middle name or initial
Suffix	Suffix. For example, BA (Hons), MSc, or Esq.
Gender	Male or Female
Title Code	List of roles. For example, Managing Director or Sales Executive.
Title	Free text description of person's title as it appears on their business card.
Department	Department the person works in
Territory	Security territory of the person. For more information, see Territory management.
Account Manager	Person from your organization responsible for the relationship with this person.
Type	Organizational area that this person works in. One or more can be checked.
Opt out of E-marketing Communications	This flag is automatically set if the email address associated with the person has opted out of all E-marketing communications received via Sage CRM's integrated E-marketing (Swiftpage). The user can manually select or clear the option, however this has no impact on E-marketing emails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing email).

Person phone details fields

Field	Description
Home	Person's home phone number
Mobile	Person’s mobile phone number

Person email fields

Field	Description
Business	Person's work email address
Private	Person’s private email address

Adding a company with multiple sites

If a new company has more than one geographical site, you should create the company in the normal way, and then add the additional address. To do this, click **New Address** on the **Addresses** tab.

You can also talk to your System Administrator about customizing the **Company** and **Address** fields to suit your needs.

Validation errors

When you add a record and click **Save**, you might get the following error message *Validation Errors - Please correct highlighted entries*.

1. If a validation error is displayed, look for fields with the following icons beside them:
   - Indicates a required field. You must enter information in fields marked with this icon.
   - Indicates that the current field value has the wrong format.
2. Complete the required fields and correct any entries in the wrong format.
3. Click **Save**.

Territory management

The **Territory** field is available on main entities (Company, People, Communications, Leads, and Opportunities, and Cases). It also appears in most lists and filter boxes.

Territories affect records, most lists and filter boxes, reports and groups. A territory can be defined geographically, by product area, or any other criteria.

Your system administrator defines territories that reflect your organization's data access security needs. Your administrator also defines which territories you can access, and assigns you a home territory.

- **Example 1**. Your company has sales teams based in Europe, Asia, and the US. Your system administrator defines territories so that the sales people can view all Opportunities, but can only add and edit Company records which belong to their own "home territory", or to a sub-territory of their home territory.
- **Example 2**. If you don't have rights to view data in the US sales territory, no US-based sales data is displayed when you run a Company list report.

When you create a new record, if you don't select a territory, the record is automatically assigned a territory, which depends on the system administrator's territory security management , and on system rules.

If your system administrator didn't define any territories, you can ignore this field. All records are then automatically assigned to the highest level territory, **Worldwide**.

Updating an existing company

- Changing company details
- Changing company address details
- Changing person details
- Adding a new address to an existing company
- Adding a new person to an existing company
- Maintaining address links
- Assigning a different address to a person
- Adding a private address to a person
- Changing phone/email details

Changing company details

1. Open the Company record you want to update, and click the **Summary** tab.
2. Click **Change**.
3. Make your changes.
4. Click **Save**.

Changing company address details

1. Open the Company record you want to update.
2. Click the **Addresses** tab. The **Link Status** icon shows if a company address is linked to existing contacts.
3. Click the address you want to change.
4. Type the new address. Select the **Set As Default Address For Company** checkbox if this address is the new principal address for the company. This also makes it the default address for any new people who are added to the company.
5. Click **Save**. People linked to this address are also affected by the change. Click the **Link Status** icon to view the linked contacts.

Changing person details

1. Open the Person record you want to update, and click **Summary** tab.
2. Click **Change**.
3. Make your changes. For more information, see Person fields.
4. Click **Save**.

Note: Keep the **Set As Default** check box selected if this person is still the main contact person for the company.

Adding a new address to an existing company

1. Open the company you want to make changes to, and click the **Addresses** tab.
2. Click **New Address**.
3. Enter the details of the new address. Alternatively, click **Select An Address To Update Or Copy** to base the new address on an existing one.
4. Select the **Set As Default** checkbox to make this address the main company address.
5. Click **Save**.

When you add an address in the context of a company, they are linked to each other. However, the **Link Status** icon shows as single-linked until the address is linked to one or more contact people. When you add an address in the context of a person, they are linked to each other. However, the **Link Status** icon shows as single-linked until the address in linked to more than one person or to the company.

Adding a new person to an existing company

1. Open the company you want to make changes to, and click the **People** tab.
2. Click **New Person**.
3. Type the first few letters of the person's **last name**, and click **Enter Person Details**. The system searches for possible duplicate person names in the system. For more information, see Preventing duplicate entries. If no potential duplicate person is found, the New Person page is displayed.
4. Fill in the necessary details.Some details are filled in automatically using the Company details. You can overwrite them if needed.
    - To link an address to a person only, select **Person address only**. To link the address to both the person and the company they work for, select **Person and company address**.
    - To select an address from the list of Company addresses, click **Select address from list**.
5. Click **Save**.

Maintaining address links

> **Note:** This topic relates to non-integration systems only.

You need to add a new mailing address to a company. The new address is not the main company address, but an additional premises where some of the existing staff have relocated to.

For example, Gatecom has acquired a new premises, 400 Pine Street Suite 500, very close to its existing main address of 400 Pine Street Suite 300. The main address is still Suite 300, but Simon Yaltoy and Mike Carlson spend most of their time at the new Suite 500 address.

The Address Links feature provides an overview of existing relationships between Companies, People and Addresses, and reduces the potential for duplicate entries of addresses by allowing you to create links from the Address Links page.

To add a new address and update the address links:

1. On the top bar, click the **Search arrow** and click **Company**.
2. Click the company name.
3. Click the **Addresses** tab. This displays a list of all company addresses.
4. Add a new address. The new address is displayed in the **Company Addresses** tab. One of the following icons is displayed next to each address:
    - (single-linked address). Indicates that the address is linked to the current contact only.
    - (multilinked address). Indicates that the address is linked to multiple existing contacts.
5. Click the **Address Link** icon. The Address Links page for the new address is displayed. The Address Links page shows the selected Address, the company, and the people who work at the company.

- **Address Linked** check box. Shows if the current address is linked to the company and any of the contact people. When you add a new address in the context of a company it is automatically linked to the company, and the Address Linked check box shows as selected. When you add a new address in the context of a person, it will automatically be linked to the person, and the Address Linked check box shows as selected.
- **Default Address** check box. Shows if the current address is set as the main address of the company or of the contact people.

6. Click the **Edit** icon beside the list of people to make changes to the existing links between this address and the contact people. The Person Address Links are displayed for editing in a new window.
7. Select the **Address Linked** check box next to the people you want to link to this address, and the **Default Address** check box next to the people, for whom this is the new main address.
8. Click **Save** and then **Continue**.

The list of Addresses is displayed. The Link Status icon shows a status of multilinked. If you check the list of Addresses in the context of Simon Yaltoy and Mike Carlson, you find the new address is displayed, linked to each contact.

> **Warning:** Removing the Address Link selection on the company or person can delete the address from the system if the address has no other links. Also, once you've made an address the default address for a company or person, you cannot remove the Address Link selection without removing the Default Address selection first.

Assigning a different address to a person

If a person is linked to a company address, you may want to assign them to a different address from the company.

1. Find the person whose details you want to change, and open the Summary page for the person.
2. Click the **Addresses** tab and click **New Address**.
3. Fill in the address details and ensure that you select the **Person Address Only** option underneath the address details.
4. Click **Save**.

Adding a private address to a person

1. Find the person whose details you want to change, and open the Summary page for the person.
2. Click the **Addresses** tab and click **New Address**.
3. Fill in the address details, and select **Home**.
4. Click **Save**.

Changing phone/email details

To update a person's phone number:

1. Find the person whose details you want to change, and open the Summary page for the person.
2. Click the **Phone/Email** tab.
3. Enter the change on the **Phone** panel and click **Save**.

To update a company phone number:

1. Find the company whose details you want to change, and open the Summary page for the company.
2. Select the **Phone/Email** tab.
3. Enter the change on the **Phone** panel and click **Save**.

Working with relationships

- The Relationships tab
- Adding a new relationship
- Relationship fields
- Deleting a relationship

The Relationships tab

The Relationships tab is available in the context of all main entities including Companies, People, Leads, Opportunities, Quotes, Orders, and Cases. Typical examples include relationships which show:

- A parent company and its subsidiaries.
- People who are on the board of directors of multiple companies.
- Companies and their suppliers.
- Critical cases affecting a company.

All relationships are reciprocal. This means they can be viewed and set up from the context of each party involved in the relationship.

You may find it helpful to read the Relationship information from the top of the screen downwards.

Your system administrator is responsible for setting up relationship types available in the system. If you need new or different relationship types to meet your business needs, please contact your system administrator.

Adding a new relationship

This example adds a new company relationship.

1. Open a Company record.
2. Click the **Relationships** tab in the context of the company.
3. Click the icon representing the type of relationship you want to add, for example, **New Parent**. The **Create New Relationship** page is displayed.
4. Fill in the fields for the new relationship.
5. Click **Save**. The new relationship is displayed in the **Relationships** tab.

You can create and generate reports based on the information in the **Relationships** tab. For more information, see Reports.

You can also display relationship information on your dashboard. For more information, see Interactive dashboard.

Relationship fields

Field	Description
Relationship Type	Select from Parent, Child or Sibling. Parent or Child relationships normally represent hierarchical relationships or relationship where some kind of ownership is involved. Sibling relationships normally represent influencing or affecting relationships. This is only a guide. There is flexibility to allow your system administrator to set up relationship types to suit your specific business needs.
Relationship Name	Select from a list of relationships defined by your system administrator. For example, select Directors (Director of). The text in brackets shows the reciprocal relationship. For example, Arnold Ball is listed under "Directors" in the context of Gatecom; in the context of Arnold Ball, Gatecom is listed under the relationship heading "Director of".
[Entity] Search Select	Search for the Person, or other entity, that you want to link to from the current context. For example, search for Arnold Ball. **Note:** If the Search Select for a Person is set to First Name (this is the default), then type Arnold, and click the magnifying glass icon.
Notes	A short note about the relationship. For example, 45% Stakeholder. This text is displayed when you hover over the Person, Case, etc. from the Relationships tab. To add a new note or edit an existing note, click the Maintain Relationship **Edit** icon and click the note you want to change.

Deleting a relationship

You can delete a relationship that is no longer valid from the **Relationships** tab where it is displayed. Before you do this, you may want to capture the relationship history some other way. For example, you can add a note to the Notes tab in the context of the person and/or the company.

1. Open the record where the relationship is displayed.
2. Click the **Relationships** tab.
3. Click the **Maintain Relationship** icon next to the relationship heading. A list of related record, for example People, is displayed.
4. Select the **Remove Relationship** check box next to the relationships you want to delete.
5. Click **Delete Selected Relationships**. A confirmation dialog box is displayed.
6. Click **OK** .

Working with notes

- Adding a note
- Editing a company or person note

Adding a note

You can add an unlimited number of text notes to the system, and attach them directly to the records where they are most relevant. You can add notes to Companies, People, Cases, Solutions, Sales Opportunities, and Leads.

1. Open the record you want to edit, and click the **Notes** tab.
2. Click **New Note**.
3. Type the text of the note.
4. Click **Save**.

Editing a company or person note

1. Open the Company record you want to update, and click the **Notes** tab.
2. Click a note.
3. Type the changes to the note.
4. Click **Save**.

Building a company team

In the context of a Company record, the **Company Team** tab displays the members of your organization who are involved in managing large accounts.

Your system administrator must give you access to this tab. They can also set up restrictions so that only Company Team members can gain access to sensitive accounts.

To add a new company team member to a company:

1. Open the company you want to make changes to, and click the **Company Team** tab.
2. Click **Add Team Member**.
3. Select a User from your organization from the list and add a description of their role.
4. Click **Save**.

Adding a person without a company link

You can add a person who has no company affiliation. This means you can:

- Keep track of a valuable contact as they move in their career.
- Stay in contact with a source of advice or expertise who does not work for any one company.

To add a new person who is not affiliated to a company:

1. Make sure you're not in the context of an existing company.
   If you are, click the Sage CRM logo. This takes you out of an existing company record.
2. Click **New | New Person**.
3. Type the first few letters of the person's name, and click **Enter Person Details** . Sage CRM searches for possible duplicate people.
   For more information, see Preventing duplicate entries. If no potential duplicate person is found, the New Person page is displayed.
4. Fill in the relevant details.
5. Leave the **For** panel blank if you don't want to associate this person with a company.
6. Click **Save**.
   You can add notes, addresses, phone, and email information for the person, using the different tabs.

Note: You can use Sage CRM to record if a person or lead has given you their consent to collect and use their personal data. You may need to do so to comply with the data privacy regulations in your country. For more information, see Recording consent that you may send marketing materials.

Reassigning a person to a company

If you have been tracking a Person with no affiliated company, and this person later joins a specific company, you can assign them to the company and move all the communications, opportunities, and cases linked to them across to the company.

Your system administrator needs to give you rights to do this.

1. Find the person you want to reassign.
2. Click their name to display the Summary page.
3. Click **Change**.
4. Click **Merge Person**. This displays an additional panel, **Assign Company**.
5. Search for and select the company that you want to assign the person to.
6. Click **Save**.

Working with duplicates

- Preventing duplicate entries
- Merging duplicate companies
- Merging duplicate people

Preventing duplicate entries

Deduplication is enabled by default. Your system administrator can customize deduplication screens and match rules.

The default Person match rule checks if Last Name contains the value you entered. For example, if you enter *Smith*, both *Smith* and *Blacksmith* are detected as possible duplicates.

The default Company match rule checks if Company Name contains the value you entered. For example, if you enter *Right*, *Design Right* is detected as a possible duplicate.

By default, deduplication checks for duplicate people within a company. You're warned if there are two people with the same name in the same company. However, you're not warned if there are two people with the same name in different companies.

To check for duplicate records before adding a new company:

1. Click **New | New Company**.
2. Enter the company name and click **Enter Company Details**. If the name matches a current company record in the database (according to the match rules defined by your system

administrator), a list of detected duplicates is displayed.
From the list of detected duplicates you can:

- Click an existing company.
- Return to the Company duplicate find page by clicking **Back To Company Entry**.
- Proceed to add a new company by clicking **Ignore Warning And Enter Company**.

3. To add a new company anyway, click **Ignore Warning And Enter Company**.
4. Enter the Company details, and click **Save**. The new company is added to Sage CRM.

The system also checks for duplicates if you change any field that have match rules set on them when you edit a record. For example, you change the company name of an existing company *Design Right Inc.* to *Design*. The system checks for other companies, which contain the word *Design*, and warns of possible duplicates, before updating the Company record.

Merging duplicate companies

Note: You cannot merge records on integrated systems.

To merge two companies, first determine a source company and a destination company.

When the companies are merged the source company is deleted, and the associated information is copied over to the destination company. For example, people, communications, opportunities, and cases. Relationships set up through the Relationships tab aren't merged.

Your system administrator must give you Delete rights to use this feature. If you don't have Delete rights and merge two companies, the old company record is kept in the database, but all the data is merged.

1. Find the company that you want to keep and use as the destination company. Usually, this is the company with more information stored against it.
2. Click the company name.
3. Click **Change**, and then **Merge Company**.
4. Select the source company.
5. Click **Save**. A review of the tabs shows that people, communications, opportunities, and cases of the source company have been copied across to the merged company. The source company is deleted.
   The source company's addresses are transferred to the destination company's **Addresses** tab. The source company's contact people also retain their original address links. These can be updated once the merge has been completed using the Address Links feature. For more information, see Maintaining address links.

Merging duplicate people

Note: Your system administrator must grant you Delete rights. Please note you can't merge synced records on integrated systems.

Check box	Description
DELETE Source Entity	You must have **Person delete rights** for this option to work. If this box is selected on its own without any other check boxes, then the source person and all of the associated data (communications, opportunities etc) from the source person will be deleted . **Note**: This is the case, even if the user does not have delete rights for the associated data.
Select/Deselect All	Use **Select All** to delete the source person and merge the associated data over to the destination person.
Merge Opportunities	Check this option to merge the opportunities associated with the source person over to the destination person. For example, opportunities associated with the duplicate source person, "Clemence Sticky" is associated with the destination person "Clemence Stickings" after the merge.
Merge Leads	Check this option to merge the leads associated with the source person over to the destination person.
Merge Cases	Check this option to merge the cases associated with the source person over to the destination person.
Merge Relations	Check this option to merge the linked information set up by your system administrator and associated with the source person over to the destination person.
Merge Library	Check this option to merge the documents associated with the source person over to the destination person.
Merge Communications	Check this option to merge the communications associated with the source person over to the destination person.
Merge Notes	Check this option to merge the notes associated with the source person over to the destination person.

1. Find the person that you want to keep and use as the destination person. Usually, this is the person with the most information stored against them.
2. Click the person's name.
3. Click **Change** and then click **Merge Person**. This displays an additional panel, Merge Person.
4. Click the **magnifying glass**, search for and click the source person.

5. Configure the options according to the information that you want to merge. Unlike the company merge, you also have the option to keep the source person.
6. Click **Save**. The destination Person Summary page is displayed. A review of the tabs shows that the information associated with the source person has been copied across to the merged person, according to the check boxes you selected. The source person is only deleted if you selected **Delete Source Entity**.

Deleting company or person records

> **Note:** You must be a system administrator or info manager

1. Find and open the company or person you want to delete.
2. From the Summary page, click **Delete**, then **Confirm Delete**.

If your profile doesn't allow you to delete company or person records, you can either:

- Ask your administrator to give you the rights to merge Company and Person records.
- Set the company status to inactive. Your system administrator can also add a status field to the Person Summary page.
    a. Open the Company Summary page.
    b. Click **Change**.
    c. Select **Inactive** from **Status**.
    d. Click **Save**.

Viewing contact history

You can view a list of communications related to a particular entity record (Company, Person, Opportunity, Case, Order, or Quote). Communications include appointments, tasks, and emails.

1. Open the entity record for which you want to view contact history.

    > **Tip:** You can search for the entity record you want to open. For details, see Using Quick Find.

2. Do one of the following:
    - To view the most recent communications, click the **Quick Look** tab.
    - To view all communications, click the **Communications** tab.
    - To generate and view a PDF report providing information about all communications, click the **Summary** tab, and then click **Summary Report**.

Calendar

- About calendar
- Difference between tasks and appointments
- Approaches to using tasks and appointments
- Setting calendar preferences
- Printing out a calendar view
- Managing tasks
- Managing appointments
- View calendar items as a list

About calendar

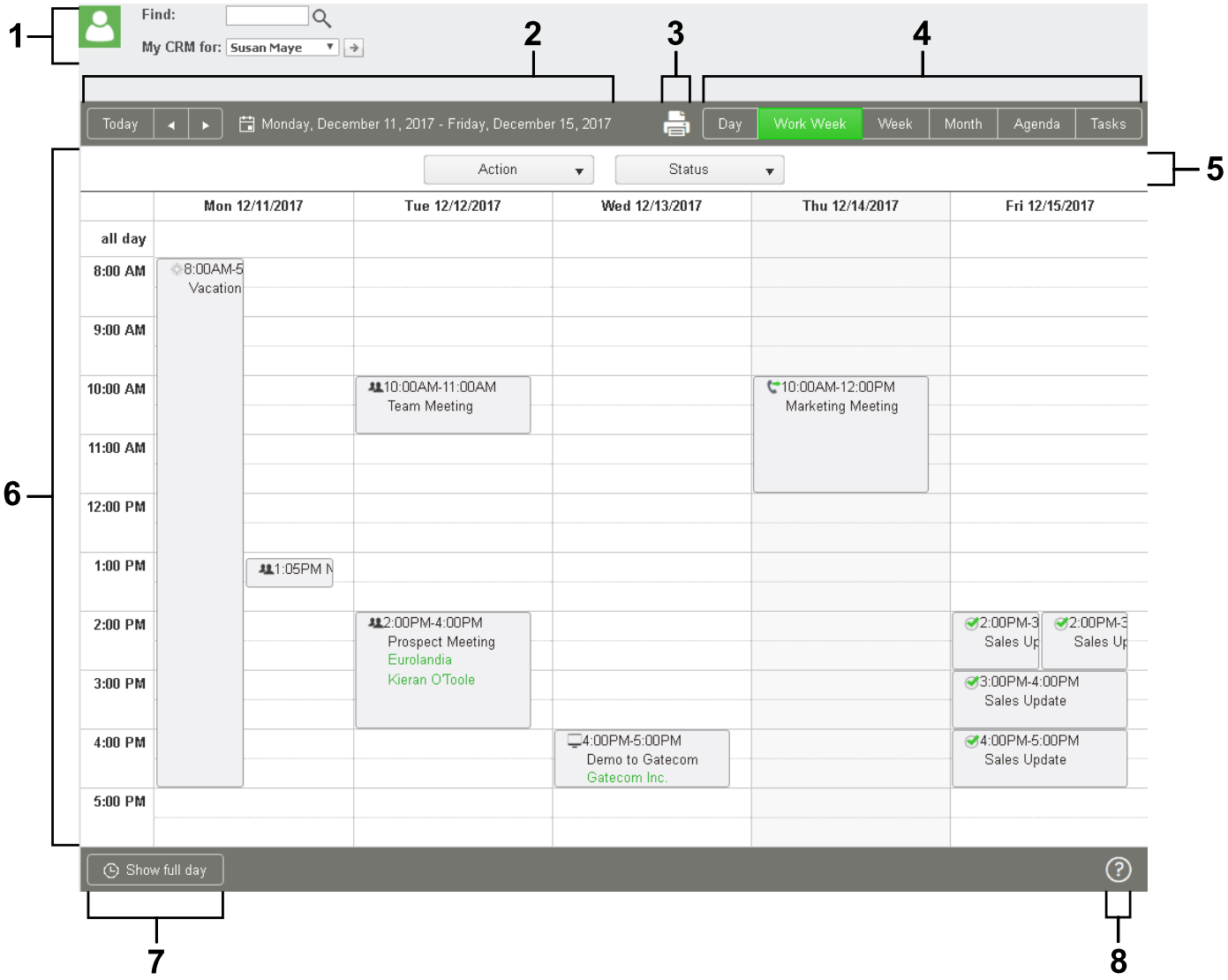
Sage CRM has a built-in calendar where you can manage your meetings and to-do list by creating items called **tasks** and **appointments** . For more information about these items, see Difference between tasks and appointments.

> **Note:** In Sage CRM, appointments and tasks are also called **communications**, because they can capture communications related to specific entity records. When searching for appointments and tasks in Sage CRM, select **Communications** from the search menu. For more information, see Using Find screens.

You can use the calendar in one of the following modes:

- **My CRM mode**. Allows you to work with tasks and appointments assigned to you and other Sage CRM users. To open the calendar in this mode, in the main menu, click **My CRM | Calendar**. When the calendar is this mode, the following icon is displayed in the top left corner:
- **Team CRM mode**. Allows you to work with tasks and appointments assigned to teams. To open the calendar in this mode, in the main menu, click **Team CRM | Calendar**. When the calendar is in this mode, the following icon is displayed in the top left corner:

The calendar has the following elements:


1
Find:
My CRM for: Susan Maye
2
3
4
Today
Monday, December 11, 2017 - Friday, December 15, 2017
Day
Work Week
Week
Month
Agenda
Tasks
5
Action
Status
6
Mon 12/11/2017
Tue 12/12/2017
Wed 12/13/2017
Thu 12/14/2017
Fri 12/15/2017
all day
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
8:00AM-5
Vacation
10:00AM-11:00AM
Team Meeting
10:00AM-12:00PM
Marketing Meeting
1:05PM
2:00PM-4:00PM
Prospect Meeting
Eurolandia
Kieran O'Toole
4:00PM-5:00PM
Demo to Gatecom
Gatecom Inc.
2:00PM-3
Sales Up
2:00PM-3
Sales Up
3:00PM-4:00PM
Sales Update
4:00PM-5:00PM
Sales Update
Show full day
7
8

Calendar element	Description
1 (current user or team)	Allows you to select the user or team whose calendar you want to view. When the calendar is in **My CRM** mode, you can use the following elements: • **Find**. Allows you to search for and select the user whose calendar you want to view. Type the partial or full name of the user and click 🔍. • **My CRM for**. Choose the user whose calendar you want to view. When the calendar is in **Team CRM** mode, you can use the **Team CRM for** list to choose the team whose calendar you want to view. To view tasks and appointments for all existing teams, select **All Teams**. To view tasks and appointments not assigned to any team, choose **--Unassigned--**. In **Team CRM** mode, you can also use the **Timeline** view to view the events in the calendar of each team member. **Note:** To view the calendar of a user or team, you must have sufficient rights in Sage CRM. For more information, contact your system administrator.
2 (navigation buttons and selected day, week, or month)	Allow you to move between days, weeks, or months in the calendar. The way the navigation buttons work depends on the selected calendar view. • **Today**. Click to go to the current day, week, or month. • ◄ (back). Click to go back one day, week, or month. • ► (forward). Click to go forward one day, week, or month. • **<selected day, week, or month>**. Shows the day, week, or month that is displayed in the calendar. Click this element to select the day, week, or month you want to view.
3 (print button)	Prints out the current calendar view.

Calendar element	Description

4
(calendar views)
	Allow you to switch between the following views.
	• **Day**. Displays appointments for the selected day.
	• **Work Week**. Displays appointments for business days of the selected week.
	• **Week**. Displays appointments for all seven days of the selected week.
	• **Month**. Displays appointments for the selected month. This view is available only when the calendar is in **My CRM** mode.
	• **Agenda**. Displays appointments and scheduled tasks that have a due date set. You can use the following filters above the calendar grid:
	  • **Action**. Filters calendar items by action type.
	  • **Status**. Filters calendar items by status.
	  • **Type**. Filters calendar items by type (task or appointment).
	• **Tasks**. Displays scheduled tasks that have a due date set. You can use the following elements above the calendar grid:
	  • **Action**. Filters tasks by action type.
	  • **Status**. Filters tasks by status.
	  • **Shows Overdue Tasks**. Shows overdue tasks for the past 90 days relative to the currently selected day or week. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
	  • **Drop files here**. Drag and drop files here to create a new files with attachments.
	• **Timeline**. Displays events in the calendar of each team member. This view is available only when the calendar is in **Team CRM** mode.
	
	For more information, see Viewing tasks and Viewing appointments.
	
	Tip: When you are in the **Work Week**, **Week** , or **Month** view, you can click an appointment to view its detailed summary without leaving the current calendar view.

Calendar element	Description
5 (filters)	Allow you to filter appointments and tasks in the current calendar view. • **Action**. Displays items that have the selected action, such as Demo, Meeting, Vacation. • **Status**. Displays items that have the selected status, such as Cancelled, Complete, In Progress, Pending. • **Type**. Displays appointments, tasks, or both. This filter is available on the **Agenda** view only.
6 (calendar grid)	Displays appointments, tasks, or both, depending on the selected calendar view and configured filter settings. The red line indicates the current time of day.
7 (day view)	Allows you to switch between: • **Full day**. Shows appointments scheduled for all 24 hours of the selected day or week. • **Business hours**. Shows appointments scheduled for the business hours of the selected day or week. For more information on how to set your business hours in the calendar, see Setting calendar preferences.
8 (help button)	Opens the calendar help.

Difference between tasks and appointments

This topic describes the features provided by tasks and appointments in the default installation of Sage CRM. The behavior may be different if your system is customized. For more information, contact your system administrator.

Feature	Task	Appointment
Displayed in the Meeting Planner. See Meeting Planner panel.	No	Yes
Shows the Meeting Planner when you create or edit a new item.	No	Yes The Meeting Planner is available for non-recurring appointments only.
Can have attachments.	Yes	No

Feature	Task	Appointment
Can be recurring.	No	Yes
Can include attendees who are not Sage CRM users (external attendees).	No	Yes
Can specify location.	No	Yes
Calendar views where the item is displayed.	• **Agenda** view • **Tasks** view A task linked to an entity record is also displayed on the **Communications** tab of the record.	• **Day** view • **Work Week** view • **Week** view • **Month** view (**My CRM** mode only) • **Agenda** view • **Timeline** view (**Team CRM** mode only) An appointment linked to an entity record is also displayed on the **Communications** tab of the record.

Approaches to using tasks and appointments

Sage CRM is a powerful tool for managing your meetings and to-do items. Here you can find some suggestions that you may find useful when working with tasks and appointments. For more information, see Difference between tasks and appointments.

The list of approaches below is not exhaustive - your organizational style and working environment may call for approaches not mentioned here.

Approach	Details
Classic Create appointments for all meetings. Create tasks for all to-do items.	With this approach, you can view and manage all your to-do items in one central location in the calendar (in the **Tasks** or **Agenda** view). However, your colleagues cannot see your tasks in the Meeting Planner. If your colleagues tend to invite you to their meetings often, you may not have any time left to work on your to-do list. Your appointments are shown in the Meeting Planner, so your colleagues cannot create conflicting appointments.
Middle-of-the-road Create appointments for all meetings and critical to-do items. Create tasks for all other to-do items.	This is a more flexible approach that allows you to block time for your critical to-do items in the calendar and in the Meeting Planner. With this approach you can view and manage your meetings and to-do items in the **Agenda** view of the calendar.
Strict time management Create appointments for all meetings and to-do items. Do not use tasks at all.	With this approach, you don't have a separate to-do list, but the times of your meetings and to-do items are blocked in the calendar and in the Meeting Planner. Hence, the chances that you'd be able to work on your to-do items without being distracted by your colleagues are quite high. You can view and manage your meetings and to-do items in the **Agenda** view of the calendar.

Setting calendar preferences

You can configure how the calendar displays information. For example, you can set your business hours, day when your work week begins, date and time format, time zone, and the default initial calendar view that displays when you open the calendar after logon.

To configure the calendar preferences:

1. Click **<My Profile> | Preferences**.
2. Click **Change**.
3. Configure the fields in the Date/Time Preferences panel.

   > **Note:** Some fields in this panel are system-wide. They define how information is displayed in the entire Sage CRM system, not only in the calendar.

4. Click **Save**.

For more information about user preferences in Sage CRM, see User preferences.

Printing out a calendar view

1. Open the calendar. For instructions, see About calendar.
2. Click the calendar view you want to print out. For more information about calendar elements, see About calendar.
3. Use the navigation buttons to select the day, week, or month you want to print out.
4. Click the print button ( ).

Note: Sage CRM uses your default printer to print out the calendar. If necessary, you can select a different printer after you click the print button ( ).

Managing tasks

- Creating a task
- Editing a task
- Completing a task
- Deleting a task
- Viewing tasks
- Managing attached files
- Task fields

For information on how tasks are synchronized when Exchange Integration or Classic Outlook Integration is enabled, see the following:

Sage CRM feature	Related help topics
Exchange Integration	• Synchronizing tasks
Classic Outlook Integration	• Scheduling appointments and tasks in Sage CRM • Scheduling appointments and tasks in Outlook

Creating a task

You can use the following methods to create a new task:

- Quick method. Allows you to create a task by specifying the task subject only. To specify other settings, you need to edit the task created with this method.
- Normal method. Allows you to create a task by configuring all possible task settings.
- Create a task with attachments. Allows you to quickly create a task with attachments by dragging and dropping one or several files in the **Tasks** view.

Quick method

> **Note:** This method is available in **My CRM | Calendar** only.

This method allows you to create a new task fast, but you can specify the task subject only. Other task fields are automatically populated with the following default values:

- **Start Date/Time:** <Current date and time>
- **Due Date/Time:**<One day ahead of current date and time>
- **Action:** To Do
- **Status:** Pending
- **Priority:** Normal
- **Territory:** <Current user's territory>
- **Team:** <Current user's team>
- **User:** <Current user>

Fields not mentioned above are left blank. To change the default field values, you need to edit the task. For more information, see Editing a task.

To create a task using the quick method:

1. Click **My CRM | Calendar**.
2. Click the **Tasks** view.
3. Type the task subject in the **Quick Task** text box in the top left corner of the calendar.
4. Click **Add**.

Normal method

This method allows you to configure all possible task settings.

For example, you can specify the task subject and details, times, and action. You can also assign the task to users or teams, select a status and priority, link the task to entity records, configure notifications and other task settings. You can use this method almost anywhere in Sage CRM.

1. In the top right corner of the Sage CRM window, click .
2. Click **New Task**.

3. Configure the task fields. For more information, see Task fields.
4. Click **Save**.

> **Tip:** You can also create a new task by clicking the **New Task** action button when viewing an entity record. For more information about action buttons, see Basic screen elements.

Create a task with attachments

This method is available only in the **Tasks** view of **My CRM** and **Team CRM** calendars. It allows you to quickly create a new task with one or several attached files. While creating your task, you can configure all possible task settings.

> **Warning:** This method doesn't add files to the **Documents** tab of the related entity record. To add files to the **Documents** tab of the related entity record, follow the steps in Attaching files to a task.

1. In the calendar, click the **Tasks** view.
2. Drag and drop the files you want to attach to the **Drop files here** area.
   Alternatively, click the **Drop files here** area to browse for and select the files.

   Make sure to observe the following parameters set by your system administrator:

   - Maximum file size
   - Allowed file types
   - Maximum number of files you can attach

   If you violate any of these parameters, you files will not be attached. For more information, contact your system administrator.
3. Configure the task fields. For more information, see Task fields.
4. Click **Save**.

For more information on working with attachments, see Managing attached files.

Editing a task

You can edit an existing task to change its status, priority, subject, details, times, and action. You can also assign the task to users or teams, link the task to entity records, manage files attached to the task, configure notifications and specify other task settings.

1. In the calendar, locate the task you want to edit.

   > **Tip:** To view and filter tasks, you can use the **Tasks** view. For more information, see Viewing tasks.

2. Open the task.

3. Configure the task fields. For more information, see Task fields.
4. Click **Save**.

Completing a task

> **Note:** This method is available in **My CRM | Calendar** only.

You can set the status of your task to **Complete** without opening the task.

1. Click **My CRM | Calendar**.
2. Click the **Tasks** calendar view. For more information about calendar elements, see About calendar.
3. In the **Complete** column, click the empty check box icon (☐) beside the task whose status you want to set to **Complete**.

   As a result, the task status is changed to **Complete** and the icon in the **Complete** column is changed to selected check box (☑).

> **Note:** Alternatively, you can complete a task by opening it and changing its status. For more information, see Editing a task.

Deleting a task

> **Warning:** A deleted task cannot be restored. Your system administrator must give you sufficient rights to delete tasks.

When you delete a task, it is deleted together with all attached files. Attachments deleted with the task are also removed from the **Documents** tab of the associated entity records.

1. In the calendar, locate the task you want to delete.

   > **Tip:** To view and filter tasks, you can use the **Tasks** view. For more information, see Viewing tasks.

2. Open the task.
3. Click **Delete**, and then click **Confirm Delete**.

Viewing tasks

- Viewing your tasks
- Filtering tasks by user, action, and status

- Viewing tasks assigned to a team
- Viewing tasks without a due date

Viewing your tasks

Note: This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

1. Click **My CRM | Calendar**.
2. Click the **Tasks** calendar view. For more information about calendar elements, see About calendar.
3. Optionally, you can filter the tasks in the list:
   - To filter tasks by action, select an action type from **Action** .
   - To filter tasks by status, select a status from **Status**.
   - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
     Overdue tasks whose due date has expired today are shown in red even if **Show Overdue Tasks** is cleared.
4. To open a task, click the task subject.

Filtering tasks by user, action, and status

You can view tasks assigned to a particular Sage CRM user. You can also filter tasks to display those with specific action or status.

This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

Note: To view tasks assigned to a Sage CRM user, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Click **My CRM | Calendar**.
2. Click the **Tasks** calendar view.
3. Search for and select the Sage CRM user whose tasks you want to view:
   a. In the **Find** text box in the top left corner, type the name of the user.
   b. If **My CRM for** list is not updated automatically, click to find the user.
   c. Select the user from the **My CRM for** list, and then click . The calendar displays tasks for the user.

4. Optionally, you can filter the tasks in the list:
    - To filter tasks by action, select an action type from **Action** .
    - To filter tasks by status, select a status from **Status**.
    - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
      Overdue tasks whose due date has expired today are shown in red even if **Show Overdue Tasks** is cleared.
5. To open a task, click the task subject.

Viewing tasks assigned to a team

This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

To view tasks assigned to a team, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Click **Team CRM | Calendar**.
2. Click the **Tasks** calendar view.
3. In the top left corner, from the **Team CRM for** list, select the team whose tasks you want to view.
   To view tasks for all existing teams, select **All Teams**.
   To view tasks not assigned to any team, select **--Unassigned--**.
4. Optionally, you can filter the tasks in the list:
    - To filter tasks by action, select an action type from **Action** .
    - To filter tasks by status, select a status from **Status**.
    - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
      Overdue tasks whose due date has expired today are shown in red even if **Show Overdue Tasks** is cleared.
5. To open a task, click the task subject.

Viewing tasks without a due date

1. In the top right corner of the Sage CRM window, click in the **Search** box.
2. Click **Communication**.
3. From **Type**, select **Tasks Only**.
4. Specify criteria to search for the tasks you want to view.
5. Click **Find**.
6. In the search results, click the subject of the task you want to view.

Managing attached files

- Attaching files to a task
- Removing an attached file from a task
- Viewing an attached file

Attaching files to a task

1. Click **My CRM | Calendar**.
2. Locate and open the task to which you want to attach files. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab.
4. Click **Add File** to locate and select the files you want to attach.

   > **Tip:** To select multiple files, hold down **Ctrl** and click the files.

   Make sure to observe the following parameters set by your system administrator:

   - Maximum file size
   - Allowed file types
   - Maximum number of files you can attach

   If you violate any of these parameters, your files will not be attached. For more information, contact your system administrator.
5. Click **Save**.

> **Note:** When you use these steps to attach files to a task in the context of an entity record, the files are also listed in the **Documents** tab of that record.

Removing an attached file from a task

1. Click **My CRM | Calendar**.
2. Locate and open the task from which you want to remove an attachment. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab. The number in parenthesis next to the tab name shows the number of files attached to the task.
4. In the **File** column, click the name of the attachment you want to remove.
5. Click **Delete**, and then click **Confirm Delete**.

Viewing an attached file

1. Click **My CRM | Calendar**.
2. Locate and open the task that contains the attached file you want to view. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab. The number in parenthesis next to the tab name shows the number of files attached to the task.
4. In the list of attachments, click next to the attachment you want to view.

   Alternatively, click the attached file name, and then click **View Attachment**.

Task fields

When creating or editing a task, you can use fields in the following panels and tabs:

- Regarding panel
- Details panel
- Scheduling panel
- Follow-up panel
- Campaigns panel
- Scheduling Options panel
- Attachments tab

Regarding panel

Use this panel to link your task to entity records.

When a task is linked to an entity record, it is displayed on the **Communications** tab of the record, forming part of the customer history.

Field	Description
Company	Specify the Company record to which you want to link the task.
Person	Specify the Person record to which you want to link the task.
Regarding	Specify the Opportunity, Case, Order, or Quote record to which you want to link the task.
New Company	Click to create a new Company record and link the task to that record.
New Person	Click to create a new Person record and link the task to that record.

Details panel

Use this panel to specify the details of your task.

Field	Description
Action	Select an action about which the task should remind you or other users. The corresponding action icon is displayed for the task in the calendar: • SMS out ( ) • Vacation ( ) • Phone out ( ) • Phone in ( ) • Letter out ( ) • Letter in ( ) • E-mail out ( ) • E-mail in ( ) • Fax out ( ) • Fax in ( ) • Meeting ( ) • Demo ( ) • To do ( )
Subject	Type the task subject.
Details	Type the task description.
Status	Select a task status.
Priority	Select a task priority.
Territory	Select a security territory for the task. For more information, see Territory management.
Private	Select this check box to hide the task from users who are not added to the **User** field of the Scheduling panel.
Created By	Displays the name of the user who created the task. This option is automatically populated when the task is created.
Created Date	Displays the date and time when the task was created. This option is automatically populated when the task is saved.

Field	Description
Percent Complete	Displays the completion percentage for the task. If the task is synchronized from Microsoft Outlook, this option displays the value set in Outlook. If the task is not synchronized from Outlook, this option displays one of the following: • **0%** when the task is canceled. • **100%** when the task is complete.
Completed Time	Displays the date and time when the task was completed. When the task status is not **Complete**, this option is blank. When the task status is set to **Complete**, this option is automatically populated with the date and time when the **Complete** status was set.

Scheduling panel

Use this panel to specify task start and due times, assign the task to users, and set up reminders.

Field	Description
Due Date/Time	Specify the date and time by which the task must be completed.
User	Specify the Sage CRM users to whom you want to assign the task. To add users, click 🔍 in **Search For**. Select the users in the list and click **Add**. To remove users, select the users in the list and click **Remove**. **Tip:** To select multiple users, hold down **Ctrl** and click the users in the list. When you assign a task to more than one user, Sage CRM creates a separate task for each user. Each task is displayed in the calendar of the relevant user.
Start Date/Time	Specify the date and time when the task becomes active.
Onscreen Reminder	Select this check box to enable and configure an onscreen reminder for the task.
Reminder Date/Time	Specify the date and time when the onscreen reminder for the task should display.
Send Reminder Message	When the onscreen reminder is enabled, you can select this check box to receive the reminder messages configured in your User preferences.
Team	Select the team to which you want to assign the task.

Follow-up panel

Use this area to create follow-up items for your task and configure SMS notifications if they are enabled by your system administrator in Sage CRM.

Field	Description
Create Follow-up Task	Select this option to create a new follow-up task based on the current task. The follow-up task is created when you save the current task with this option selected.
Create Follow-up Appointment	Select this option to create a new follow-up appointment based on the current task. The follow-up appointment is created when you save the current task with this option selected.
Create Follow-up Opportunity	Select this option to generate a new opportunity based on the current task. This option is available only when editing an existing appointment.
Send SMS Message Immediately	Select this option to send a notification SMS message to the users added to the **User** option in the Scheduling panel. This option is available only if your system administrator has enabled SMS messaging in Sage CRM.

Campaigns panel

Use this panel to link the task to a marketing campaign wave activity.

By default, this area is hidden. To show this area, click the **Show Campaigns** action button.

Field	Description
Wave Activity	Specify the wave activity to which you want to link the task. This option is read-only if the task was created in the context of a wave activity. Such a task is automatically linked to the wave activity.
Response Type	Allows you to select a response type. This option becomes available once you have specified a wave activity.

For more information about marketing campaigns, see Campaign management.

Scheduling Options panel

Use this area to create linked tasks for each record in the list of search results.

This area is available when you create a new task from the list of search results after searching for Companies, People, Cases, Leads, or Opportunities.

Field	Description
Number Per Day	Specify the number of tasks to create per each day.
Broker Rule	Allows you to assign the tasks to users or a team. You can select one of the following: • **Round Robin**. Assigns the specified number of tasks to each user in the **User** option. • **Queue**. Assigns the specified number of tasks to the team selected in the **Team** option. The tasks can then be manually distributed between team members. **Note:** For more information about the **User** and **Team** options, see Scheduling panel.
• Mon • Tue • Wed • Thu • Fri • Sat • Sun	Select the days of week when you want to create tasks.

Attachments tab

Use this tab to view, add, and remove task attachments. This tab is available only when you edit a saved task.

Field	Description
Add File	Click this button to browse for a file and attach it to the task.
Drop files here to attach them	Drag and drop your files to this area to attach them to the task. This area is available in some browsers only.
Owner	Allows you to filter the attached files by a particular owner. Select the owner whose files you want to view from the list, and then click **Filter**. If the owner is not listed, use the search box to look for the owner and add him or her to the list.

After you click the name of an attached file in the list, the **Attachments** tab displays the following panels:

Panel	Description
For	Provides information about any records to which the attached file is linked. • **Company**. Shows the Company record to which the file is linked. • **Person**. Shows the Person record to which the file is linked. • **Regarding**. Shows the Opportunity, Case, Order, or Quote record to which the file is linked.
Details	This panel has the following elements: • **Type**. Specify the attachment type. • **Category**. Specify the attachment category. • **Status**. Specify the attachment status. • **Owner**. Specify the attachment owner. • **Team**. Specify the team that owns the attachment. • **Description**. Enter attachment description.

Managing appointments

- Creating an appointment
- Editing an appointment
- Configuring recurrence for an existing appointment
- Deleting an appointment
- Viewing appointments
- Managing external attendees
- Appointment fields

For information on how appointments are synchronized when Exchange Integration or Classic Outlook Integration is enabled, see the following:

Sage CRM feature	Related help topics
Exchange Integration	• Synchronizing appointments
Classic Outlook Integration	• Scheduling appointments and tasks in Sage CRM • Scheduling appointments and tasks in Outlook

Creating an appointment

You can use the following methods to create a new appointment:

- Quick method. Allows you to create an appointment by specifying the appointment subject, start date and time, and end date and time. You can use this method in the following calendar views only: **Day**, **Week**, **Work Week**. The Meeting Planner is not available with this method. Also, when creating an appointment, you cannot link it to any entity records.
- Normal method. Allows you to create an appointment by configuring all possible appointment settings. With this method, you can also use the Meeting Planner to check the availability of the appointment attendees who are Sage CRM users. You can use the normal method almost anywhere in Sage CRM.

For more information about the Meeting Planner, see Meeting Planner panel.

Quick method

> **Note:** This method is available in **My CRM | Calendar** only.

This method allows you to create a new appointment fast, but you can specify the following settings only:

- Appointment subject
- Start date and time
- End date and time

Other appointment fields are automatically populated with the following default values:

- **Action:** Meeting
- **Status:** Pending
- **Priority:** Normal
- **Territory:** <Current user's territory>
- **Team:** <Current user's team>
- **User:** <Current user>

To change the default settings, you need to edit the appointment. For more information, see Editing an appointment.

To create an appointment using the quick method:

1. Click **My CRM | Calendar**.
2. Open one of the following calendar views:
   - **Day**
   - **Work Week**
   - **Week**

   For more information, see About calendar.

   By default, you create an appointment for the current user. If necessary, you can create an appointment for another Sage CRM user by opening that user's calendar:

   a. In the **Find** text box in the top left corner, type the name of the user.

      If **My CRM for** list is not updated automatically, click to find the user.

   b. Select the user from the **My CRM for** list, and then click .
3. Double-click anywhere in the calendar grid.
4. In the dialog box that opens, use the following fields
   - **Subject**. Type an informative subject with which you want to identify your appointment in the calendar.
   - **Start Time**. Enter the start date and time for your appointment.
   - **End Time**. Enter the end date and time for your appointment.
5. Click **Save**.

Normal method

When creating an appointment using the normal method, you can configure all possible appointment settings.

For example, you can specify the appointment subject, details, times, action, and location. You can also add entire teams or internal attendees who are Sage CRM users. You can select a status and priority, link the appointment to entity records, and configure notifications, recurrence, and other appointment settings.

> **Note:** You can add external attendees who are not Sage CRM users only after saving your appointment.

To create an appointment using the normal method:

1. In the top right corner of the Sage CRM window, click .
2. Click **New Appointment**.
3. Configure the appointment fields. For more information, see Appointment fields.

   When setting the appointment time, you can use the Meeting Planner panel to check the availability of internal appointment attendees and avoid possible conflicts. The Meeting Planner doesn't show

the availability of external appointment attendees. The Meeting Planner is not available for recurring appointments.

4. Click **Save**.

   Now you can add external attendees to your appointment, if necessary. For more information, see Adding external attendees to an appointment.

Editing an appointment

You can edit an existing appointment to change its status, priority, subject, details, type, recurrence, add or remove internal and external attendees or teams, and configure other appointment settings.

1. In the calendar, locate the appointment you want to edit.

   > **Tip:** To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.

2. Open the appointment.
3. Configure the appointment fields. For more information, see Appointment fields.

   When setting the appointment time, you can use the Meeting Planner panel to check the availability of the internal appointment attendees and avoid possible conflicts. The Meeting Planner is not available for recurring appointments.

4. Click **Save**.

> **Tip:** When using the **Day**, **Work Week**, or **Week** views in **My CRM** calendar, you can change the date and time of a non-recurring appointment without opening it. Just drag and drop the appointment to the new date and time. Extend or reduce the appointment duration by dragging and dropping the upper or lower end of the appointment rectangle.
> The drag and drop method is not available on recurring appointments, appointments in **Team CRM** calendar, appointments in a colleague's calendar, and all-day appointments.

Configuring recurrence for an existing appointment

You can add, edit, or delete recurrence for an existing appointment. Note that you can configure recurrence only for those appointments whose status is **Pending**, **In Progress**, or **--None--**.

1. In the calendar, locate and open the appointment for which you want to configure recurrence.

   > **Tip:** To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.

2. In the Scheduling panel, click **Recurrence**.

3. Configure the recurrence settings. For more information, see Communication Recurrence window. To delete recurrence, click **Delete**.
4. Click **Save**.

   In the calendar views, recurring appointments are marked with the following icon: .
   The Meeting Planner is not available for recurring appointments.

Deleting an appointment

Warning: A deleted appointment cannot be restored. Your system administrator must give you sufficient rights to delete appointments.

1. In the calendar, locate the appointment you want to delete.

   Tip: To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.
2. Open the appointment.
3. Click **Delete**, and then click **Confirm Delete**.

Viewing appointments

- Viewing your appointments
- Filtering appointments by user, action, and status
- Viewing appointments for a team
- Viewing appointments for a team member

Viewing your appointments

1. Click **My CRM | Calendar**.
2. Click one of the following calendar views:
   - **Day**
   - **Work Week**
   - **Week**
   - **Month**
   - **Agenda**

   For more information about calendar elements, see About calendar.

3. If you are on the **Agenda** view, from **Type**, select **Appointments Only**.
4. Use the navigation buttons to select the day, date range, or month for which you want to view appointments.
5. Optionally, you can filter the appointments in the list:
    - To filter appointments by action, select the action type from **Action**.
    - To filter appointments by status, select the status from **Status**.

    Each appointment is marked with an icon indicating its action. For more information about these icons, see Details panel. Recurring appointments are marked with .
6. To open an appointment, double-click it.

Tip: When you are in the **Day**, **Work Week**, **Week** , or **Month** view, you can click an appointment to view its detailed summary without leaving the current calendar view.

Filtering appointments by user, action, and status

You can view appointments assigned to a particular Sage CRM user. You can also filter appointments to display those with specific action or status.

Note: To view appointments assigned to another Sage CRM user, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Click **My CRM | Calendar**.
2. Click one of the following calendar views:
    - **Day**
    - **Work Week**
    - **Week**
    - **Month**
    - **Agenda**

    For more information about calendar elements, see About calendar.
3. If you are on the **Agenda** view, from **Type**, select **Appointments Only**.
4. Search for and select the Sage CRM user whose appointments you want to view:
    a. In the **Find** text box in the top left corner, type the name of the user.
    b. If **My CRM for** list is not updated automatically, click to find the user.
    c. Select the user from the **My CRM for** list, and then click .

5. The calendar displays appointments for the user.

   Recurring appointments are marked with .
   For more information, see Configuring recurrence for an existing appointment.

6. If necessary, filter the appointments:
   - To filter appointments by action, select the action type from **Action**.
   - To filter appointments by status, select the status from **Status**.

Viewing appointments for a team

Note: To view appointments assigned to a team, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Click **Team CRM | Calendar**.
2. Click one of the following calendar views:
   - **Day**
   - **Work Week**
   - **Week**
   - **Month**
   - **Agenda**

   For more information about calendar elements, see About calendar.
3. If you are on the **Agenda** view, from **Type**, select **Appointments Only**.
4. In the top left corner, from the **Team CRM for** list, select the team whose appointments you want to view.
   To view appointments for all existing teams, select **All Teams**.
   To view appointments not assigned to any team, select **--Unassigned--**.
5. Optionally, you can filter the appointments in the list:
   - To filter appointments by action, select the action type from **Action**.
   - To filter appointments by status, select the status from **Status**.

   Each appointment is marked with an icon indicating its action. For more information about these icons, see Details panel. Recurring appointments are marked with .
6. To open an appointment, double-click it.

Tip: When you are in the **Timeline**, **Day**, **Work Week**, **Week** , or **Month** view, you can click an appointment to view its detailed summary without leaving the current calendar view.

Viewing appointments for a team member

To view appointments assigned to a team member, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Click **Team CRM | Calendar**.
2. Click the **Timeline** calendar view. For more information about calendar elements, see About calendar.
3. Use the navigation buttons to select the day for which you want to view appointments.
4. In the top left corner, from the **Team CRM for** list, select the team that includes the member whose appointments you want to view.

   The calendar shows all team members and their appointments for the selected day.

Managing external attendees

You can add external attendees to a saved appointment. External attendees are people who are not Sage CRM users. You can add only those external attendees for whom Person records exist in Sage CRM.

- Adding external attendees to an appointment
- Removing external attendees from an appointment

Adding external attendees to an appointment

> **Note:** You can add external attendees to saved appointments only. The external attendees must exist in Sage CRM as Person records. For more information, see Customer information.

1. Click **My CRM | Calendar**.
2. Locate and open the appointment to which you want to add external attendees.
   For more information, see Viewing appointments.
3. In the top left corner of the appointment, click the **External Attendees** tab.
4. Find and select the external attendees you want to add:
   a. Click **Add Attendees to Appointment**.
   b. Specify criteria to look for the Person records that represent the external attendees you want to add.
   c. Click **Find** .
   d. In the **Select** column of the search results list, select the check boxes next to the Person records you want to add.
   e. Click **Add Attendees to Appointment**.

When you add external attendees, the appointment is displayed on the **Communications** tab of the Person records representing the external attendees.

Removing external attendees from an appointment

1. Click **My CRM | Calendar**.
2. Locate and open the appointment from which you want to remove external attendees. For more information, see Viewing appointments.
3. In the top left corner of the appointment, click the **External Attendees** tab.
4. In the **Remove** column, select the check boxes next to the external attendees you want to remove.
5. Click **Remove Selected Attendees from Appointment**.

   When you remove external attendees, the appointment is removed from the **Communications** tab of the Person records representing the external attendees.

Appointment fields

When creating or editing an appointment, you can use fields in the following panels and tabs:

- Regarding panel
- Details panel
- Scheduling panel
- Meeting Planner panel
- Follow-up panel
- Campaigns panel
- External Attendees tab

Regarding panel

Use this panel to link your appointment to entity records.

When an appointment is linked to an entity record, it is displayed on the **Communications** tab of the record, forming part of the customer history.

Field	Description
Company	Specify the Company record to which you want to link the appointment.
Person	Specify the Person record to which you want to link the appointment.
Regarding	Specify the Opportunity, Case, Order, or Quote record to which you want to link the appointment.

Field	Description
New Company	Click to create a new Company record and link the appointment to that record.
New Person	Click to create a new Person record and link the appointment to that record.

Details panel

Use this panel to specify the details of your appointment.

Field	Description
Action	Select an action about which the appointment should remind you or other users. The corresponding action icon is displayed for the appointment in the calendar: • SMS out () • Vacation () • Phone out () • Phone in () • Letter out () • Letter in () • E-mail out () • E-mail in () • Fax out () • Fax in () • Meeting () • Demo () • To do ()
Subject	Type the appointment subject.
Location	Type the appointment location. You can add a resource user, for example, London meeting room. If you've already typed some text in this option, add the resource user after the text. Use a semicolon as a separator.
Details	Type the appointment details.
Status	Select an appointment status.
Priority	Select an appointment priority.

Field	Description
Territory	Select a security territory for the appointment. For more information, see Territory management.
Private	Select this check box to hide the subject and details of the appointment from users who are not added to the **User** option of the Scheduling panel. The appointment time is displayed as busy (blocked) to such users.
Created By	Displays the name of the user who created the appointment. This option is automatically populated when the appointment is created.
Created Date	Displays the date when the appointment was created. This option is automatically populated when the appointment is saved.
Percent Complete	Displays the completion percentage for the appointment: • **0%** when the appointment is canceled. • **100%** when the appointment is complete.
Completed Time	Displays the date and time when the appointment was completed. When the appointment status is not **Complete**, this option is blank. When the appointment status is set to **Complete**, this option is automatically populated with the date and time when the **Complete** status was set.

Scheduling panel

Use this panel to specify appointment times, appointment attendees, schedule your appointment, configure recurrence, and set up reminders.

Field	Description
Date/Time	Specify the start date and time of the appointment.
End Time	Specify the end and time of the appointment.
All day event	Select this option to make the appointment an all-day event. When selected, this option overrides the start and end times in the **Date/Time** and **End Time** options.

Field	Description
User	Specify appointment attendees. In this option, you can specify only Sage CRM users. To add or remove attendees who are not Sage CRM users, go to the External Attendees tab. For more information, see Adding external attendees to an appointment and Removing external attendees from an appointment. To add users, click 🔍 in **Search For**. Select the users in the list and click **Add**. To remove users, select the users in the list and click **Remove**. **Tip:** To select multiple users, hold down **Ctrl** and click the users in the list. The appointment appears in the calendar of each user added to the **Users** option.
Reminder	Configure an onscreen reminder for the appointment. Select when the reminder displays before the appointment. To disable the reminder, select **Don't remind me**. When an onscreen reminder is enabled, you can also select **Send Reminder Message** to receive the reminder messages configured in your User preferences.
Team	Select the team you want to participate in the appointment.
Recurrence	Click this option to configure or delete recurrence for the appointment. For more information, see Communication Recurrence window. When recurrence is set up for the appointment, the recurrence details are displayed under the **Recurrence** option. **Note:** The default maximum number of occurrences is 200. If you exceed the maximum number of occurrences, an error message is displayed and you can't save the appointment.

Communication Recurrence window

Use this window to configure recurrence for the appointment.

Panel	Description
Recurrence Pattern	Specify the frequency with which you want the appointment to recur.
Daily Pattern	Specify the time of day when you want the appointment to start and finish. • If you select **Occurs Once At**, only one appointment is created for each day set up in the **Recurrence Pattern** panel. • If you select **Occurs Every**, a separate appointment is created for each day. Use the **Duration** panel to specify the date range in which you want the appointments to recur. **Note:** When Exchange Integration is enabled, the **Occurs Every** option is not available.
Duration	Set the date range in which you want the appointment to recur.

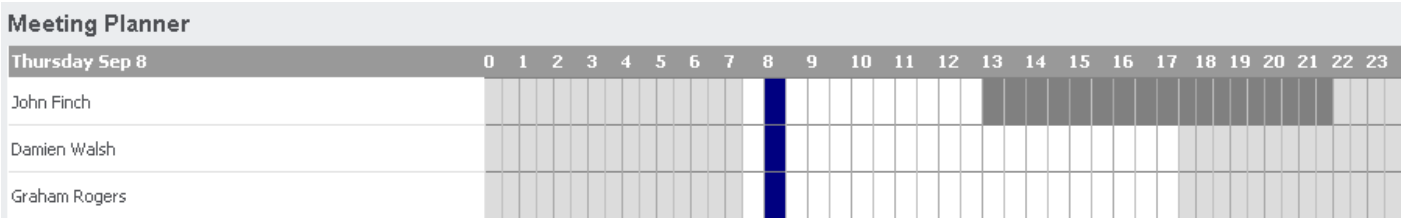
Note: The default maximum number of appointment occurrences is 200. If you exceed this number, an error message is displayed and you can't save the appointment.

Meeting Planner panel

Note: This panel is available only when you create or edit a non-recurring appointment.

Provides a free/busy grid that shows the availability of the appointment attendees added to the **User** option in the Scheduling panel. The Meeting Planner is similar to the Scheduling Assistant in Microsoft Outlook. You can use the Meeting Planner to avoid conflicting events when planning appointments.

Free office hours are shown in white, busy hours are displayed in dark gray, out of office hours are displayed in light gray. Any conflicts with the current appointment are highlighted in red.



In this example, Damien Walsh and Graham Rogers are free from 7.30 until 17.30 and John Finch is busy from 13.00 until 22.00.

Tip: You can use the Meeting Planner to set the start and end time of an appointment. In the free/busy grid, click the start time, and then click the end time. The area between the start and end time is marked in dark blue, indicating the appointment hours.

Follow-up panel

Use this panel to create follow-up items for your appointment and configure SMS notifications if they are enabled in Sage CRM.

Field	Description
Create Follow-up Task	Create a new follow-up task based on the current appointment. The follow-up task is created when you save the current appointment with this option selected.
Create Follow-up Appointment	Create a new follow-up appointment based on the current appointment. The follow-up appointment is created when you save the current appointment with this option selected.
Create Follow-up Opportunity	Create a new opportunity based on the current appointment. This option is available only when editing an existing appointment.
Send SMS Message Immediately	Send a notification SMS message to the users added to the **User** option in the Scheduling panel. This option is available only if your system administrator has enabled SMS messaging in Sage CRM.

Campaigns panel

Use this panel to link the appointment to a marketing campaign wave activity.

By default, the **Campaigns** panel is hidden. To display this panel, click the **Show Campaigns** action button in the appointment.

Field	Description
Wave Activity	Specify the wave activity to which you want to link the appointment. This option is read-only if the appointment was created in the context of a wave activity. Such an appointment is automatically linked to the wave activity.
Response Type	Select a response type. This option becomes available once you have specified a wave activity.

For more information about marketing campaigns, see Campaign management.

External Attendees tab

Note: This tab is available only when you view a saved appointment.

Use this tab to view, add, and remove external attendees. You can add only those external attendees whose details are entered into Sage CRM as Person records.

When the appointment has any external attendees, the following icon is displayed next to the tab name:

When Exchange Integration is enabled, the **External Attendees** tab shows the response to the appointment invitation from Exchange Server.

For more information about working with external attendees, see Managing external attendees.

Action button	Description
Add Attendees to Appointment	Allows you to search for, select, and add external attendees to the list. For more information, see Adding external attendees to an appointment When you click this button, the **Find and Add External Attendees** tab opens. Use the **Find** panel on this tab to specify search criteria for the Person records you want to add as external attendees to the appointment. Click **Find** to start your search. When your search completes, select the check boxes in the **Select** column next to the records you want to add as external attendees, and then click **Add Attendees to Appointment**.
Remove Selected Attendees from Appointment	Removes selected external attendees from the list. For more information, see Removing external attendees from an appointment.

View calendar items as a list

To use screen space more efficiently, you can view all items in **My CRM** calendar as a list. You can sort or filter the calendar list to zoom in on the items you need. Also you can open a particular item in the list to edit or delete it.

- To view calendar items as a list, click **My CRM | Calendar List**.
- To edit a list item, double-click it, make your changes, and then click **Save**.
- To delete a list item, double-click it and then click **Delete**.

You can also:

- Filter calendar list
- Sort calendar list
- Refresh calendar list

Filter calendar list

You can filter the calendar list using the funnel icon that is displayed beside each column heading. The appearance of the funnel icon can indicate the following:

- The list isn't filtered by this column.
- The list is currently filtered by this column.

To apply a filter:

1. Go to **My CRM | Calendar List**.
2. Click beside the heading of the column by which you want to filter the list.
3. Specify your filter criteria and click **Apply**.

   You can filter the list by multiple columns.

To clear or modify a filter:

1. Go to **My CRM | Calendar List**.
2. Click beside the heading of the column whose filter you want to clear or modify.
3. Do one of the following:
   - Click **Clear**.
   - Modify your filter criteria and click **Apply**.

Sort calendar list

Click the heading of the column by which you want to sort the calendar list. The arrow that appears beside the column heading indicates one of the following:

- The list is sorted by this column in the ascending order.
- The list is sorted by this column in the descending order.

To disable sorting:

- Click the heading of the column until the arrow beside it disappears.

Refresh calendar list

When you view the calendar list and some other user creates a new item in the calendar, it doesn't appear in the calendar list until you refresh it manually:

- Click the refresh icon ( ) in the bottom right corner of the calendar list.

Tip: We recommend that you manually refresh the calendar list regularly to ensure it displays all recently-created items.

Email

- Sage CRM email
- Setting a default email template
- Managing your email signature
- Sending an email
- Using Microsoft Outlook to send emails
- Replying to an email
- Converting emails
- Filing inbound and outbound emails
- Email shortcut keys

Sage CRM email

You can send and receive emails from Sage CRM. This means that you:

- Don’t need to retype or remember contact email addresses that are already in the system.
- Can store emails with a customer record for future reference.
- Can convert inbound emails directly to a customer service case, a sales opportunity, or new lead.

Setting a default email template

You can set a default email template which is automatically used when you create a new email. All values in the default template are copied to the new email. The system administrator defines the list of default email templates. You can create and set as default your own email template containing your email signature. For more information, see Creating your email signature.

1. Click **<My Profile> | Preferences** and then click **Change**.
2. Select the email template you want to set as default from **Default Email Template**.
3. Click **Save**.

Managing your email signature

You can create or edit your email signature and automatically add it to each outbound email you send from Sage CRM.

When you create your email signature, it is stored in a new email template that is used for all outbound emails you send from the built-in email client.

Each Sage CRM user can have only one email signature. The email signature you create is not available to other Sage CRM users. You can temporarily disable your email signature or delete it completely if necessary.

- Creating your email signature
- Editing your email signature
- Enabling or disabling your email signature
- Deleting your email signature

Creating your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Create Email Signature**.
3. In the **Template Name** option, enter a descriptive name for your email signature.
   For example, *My email signature*.
4. In the text box below the toolbar, type your email signature.
   Keep the default values of all other options.
5. Click **Save**.

You have created your email signature, the email template containing the signature is automatically selected in **<My Profile> | Preferences | Default Email Template**.

Editing your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Edit Email Signature**.
   If this button is not available, it means that you haven't created an email signature yet. For more information, see Creating your email signature.
3. In the **Template Name** option, edit the name of the email template containing your email signature.
4. In the text box below the toolbar, edit your email signature.
5. Click **Save**.

Enabling or disabling your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Change**.
3. In **Default Email Template**, do one of the following:
    - **To disable your email signature**. Select **--None--** or any other email template that doesn't contain your email signature.
    - **To enable your email signature**. Select the email template that contains your email signature.
4. Click **Save**.

Deleting your email signature

To delete your email signature, delete the email template that contains the signature. A deleted email template cannot be recovered.

1. Click **<My Profile> | Preferences**.
2. Click **Edit Email Signature**.
   If this button is not available, it means that you haven't created an email signature yet. For more information, see Creating your email signature.
3. Click **Delete**.
4. If prompted, confirm that you want to delete the email template.

Once you have deleted the email template containing your email signature, you may need to select another default email template. For more information, see Setting a default email template.

Sending an email

This topic describes how to send an email using a built-in email editor in Sage CRM. For more information on how to send an email using Outlook, see Using Microsoft Outlook to send emails.

1. Open the new email window by doing one of the following:
    - Click **| New Email**.
    - Search for the customer you want to email and click the person's or company's email address.
    - Click any email address in Sage CRM.
2. In the window that opens, specify Email options.

3. Enter your email text and format it using Text editor buttons.

> **Tip:** To find out what a toolbar button does, point to the button and read the tooltip. For example, you can insert bulleted and numbered lists, tables, images, highlight text, and add HTML content.

4. If necessary, attach a file to your email:
   - To attach a global file to the email, click the **Search Select Advanced** () icon. Locate and select the file, and click the **Attach** ( ) icon. For more information, see Search Select Advanced.
   - To upload an inline image (GIF, JPEG, or JPG), click **Choose File**. Locate and select the file, and click **Upload inline image**.
   - To attach a local file to the email, click **Choose File**. Locate and select the file, and click **Upload Attachment**.
   - To remove an attached file from your email, click the **Bin** icon ( ) beside the file name.
5. Configure Communication options.
6. Click **Send**.

> **Tip:** You can configure Sage CRM to open the new email screen in a new browser window. This lets you continue working with Sage CRM and write an email at the same time. For more information, see User preferences.

Email options

Field	Description
Template	Sage CRM templates usually contain standard content and field codes.
From	The email address from which your email is sent. By default, this is the address of the current user. If this field is set to **None**, the email is sent from the address of the current user. You can select an alternative **From** address only if you have permissions to send emails from other accounts. If you have these permissions, you can change the default email address in **<My Profile> | Preferences | Default Email address**.
Reply to	The email address to which replies to your email are sent. This field is available only if you have permissions to send emails from other accounts.
To	The recipients of your email. Use a semicolon as a separator.
CC	The recipients to whom you want to send a copy of your email. Use a semicolon as a separator.

Field	Description
BCC	The recipients to whom you want to sent a blank carbon copy of your email. Use a semicolon as a separator. You can use the following methods to search for and add recipients to the **To**, **CC**, or **BCC** fields: **Method 1** Start typing the name or email address of a person or company in **To**, **CC**, or **BCC** to display a list of matching records. In the list, click the person or company record you want to add as a recipient. **Method 2** Look for the person record using the search box on the right-hand side of the screen. Then, select the person record in the list below the search box, and click the green left arrow next to the **To**, **CC**, or **BCC** field. You can add only one recipient at a time.
Subject	The subject line for the email.
Do not file this communication	When selected, the email is not filed in Sage CRM. When not selected, your email is saved as a communication for the persons to whom it was sent.
Choose Field to insert into the Email	The merge fields that you can include in the email. For example, you can include the recipient's first name or title in the email.
Source	Allows you to copy and paste HTML into the email body field. HTML source code typically references image files, such as JPGs, GIFs and BMPs. Ensure that images are referenced correctly so the person receiving the email can view them. You must specify the source of an image file as an Internet path in the HTML source code. For example, `<img src = "http://www.domain.com/products/image.gif">`. Use this only if you have experience writing HTML source code.
Search select	Lets you select a global file to attach to the email. For more information, see Search Select Advanced.
Attach	Attaches a global file to the email.
Choose File	Lets you select a local file to attach to the email or to select an inline image to include in the email body.
Upload attachment	Attaches a local file to the email.
Upload inline image	Includes an inline image in the email body.

Communication options

Note: If you're using Email Management to handle outbound emails, the Communications options are not available.

Field	Description
Status	The status of the saved communication.
Team	The team in which the communication is saved.
Territory	The territory in which the communication is saved.
Action	The type of communication created from the email.
Wave Activity	The wave activity to which the email is linked. For more information, see What is campaign management?

Using Microsoft Outlook to send emails

You can merge customer details with the email functionality in Sage CRM and then send the email using Outlook.

1. Find the person or company you want to email and click their email address.
2. Click **Send Using Outlook**. An Outlook window is displayed, with the person's email address in **To**.
3. Type and format the body of the email.
4. Click **Send** in the Outlook window. The email is sent by Outlook, and is also saved with the Communication record against the person or company it was sent to.

Any attachments to the Sage CRM email are automatically attached to the Outlook email.

Replying to an email

You can reply to an email that's stored in Sage CRM with a Communication record.

1. Find the person who you received the email from.
2. Click the **Communications** tab within the context of the person.
3. Click the Communications icon of the email you sent.
4. Click **Reply** or **Reply All**.

5. Complete the email fields and send the email. For a description of email fields, see Sending an email.

Converting emails

You can convert an inbound or outbound email communication, where the action type is **Email In** or **Email Out**, to a case, opportunity, or lead.

1. Open the communication that was created when you sent or received the email.
2. Click **New Case**, **New Opportunity**, or **New Lead**.
3. Enter the details of the case, opportunity, or lead.
4. Click **Save**. The case, opportunity, or lead is saved against the person or company associated with the email communication.

Filing inbound and outbound emails

If the Outlook Plugin for either Exchange Integration or Classic Outlook Integration is installed, you can use **File Email** from Outlook to file an inbound email communication with the customer record in Sage CRM. For more information, see Filing emails using Classic Outlook Integration.

If your system administrator has set up Sage CRM to use the E-mail Management functionality, inbound emails are automatically filed against the matching Person or Company record.

- Outbound email
- Inbound emails
- Rules applied to email handling

Outbound email

> **Note:** For instructions on how to file an outbound email when using the built-in Sage CRM email editor, see Sending an email.

- Emails sent from Sage CRM or from Sage CRM using **Send Using Outlook**, are automatically BCCed to a Mail Manager Server Filing address.
  In Sage CRM, this address isn't visible in the BCC field. To see if Email Management is set up, click **Send Using Outlook**. The Mail Manager Server filing address is visible in the **BCC** field.

  > **Note:** A mass email sent to a group is not filed if Email Management is enabled. When Email Management is disabled, a communication record is automatically created for each recipient.

- You can send emails from outside Sage CRM to a customer and manually add the Mail Manager Server Filing address to the **BCC** field.
- When you send an email from Sage CRM, or from Outlook or another email application, and manually BCC the Mail Manager Server Filing address, a Communication record is automatically created for the customer who matches the email address in the To field. For more information, see Rules applied to email handling.
- Attachments to emails are filed with a Communication record in Sage CRM.

Inbound emails

- Inbound emails can be forwarded to the Mail Manager Server Filing Address. When this happens, a new Communication record is created in Sage CRM. Attachments are saved with the communication.
- For emails received by users and then forwarded to the Mail Manager Server Filing Address, this email address must be the only address in the To field.
- The original sender's email address must be the first email address contained in the body of the email that's forwarded to the mailbox. This is because E-mail Management recognizes the first address in the body as the original sender's address.

Note: You may need to retype the sender’s email address at the top of the forwarded email to ensure this filing takes place correctly.

Your system administrator can customize E-mail Management functionality for your specific needs. For example, incoming emails to the support@domain.com could automatically create a Case assigned to the Customer Service team.

Rules applied to email handling

- When an email is received in the specified mailbox, the email database table is checked for all people associated with the email address.
- If only one person is associated with the email address— even if the email address is used as a private and business type—a communication is created for the person and is associated with the Sage CRM user.
- If an associated person can't be found or if multiple people are associated with the address, the email table is checked for an associated company and a communication is created for the company. This is also associated with the Sage CRM user.

Email shortcut keys

You can use the following shortcuts:

Shortcut	What it does
Shift + <click>	Opens new email and inserts addresses in **To**.
Ctrl + <click>	Opens new email and inserts addresses in **CC**.
Alt + <click>	Opens new email and inserts addresses in **BCC**.

Exchange Integration

- About Exchange Integration
- Synchronizing contacts
- Synchronizing tasks
- Synchronizing appointments
- Reviewing Exchange Integration logs

About Exchange Integration

Sage CRM Exchange Integration is an integration between Sage CRM and Microsoft Exchange Server. Appointments, tasks, and contacts can be synchronized between Sage CRM and Exchange Server. There is no synchronization to individual Outlook clients. The synchronization runs automatically in the background. This functionality is supported if you're working in the Outlook client, Outlook Web Access, or using a mobile device that connects to Exchange.

If Exchange Integration is set up, your system administrator can install the optional Lite Outlook Plugin or you can install it yourself. The plugin lets you add Outlook contacts to Sage CRM from the Outlook Client, file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. For more information, see Installing the Lite Outlook Plugin.

Your system administrator sets up the connection to Exchange and enables your mailbox for synchronization. The system administrator also configures the synchronization direction, conflict resolution, and logging settings, and starts the synchronization process. When your mailbox is synchronizing with Sage CRM, a notification is displayed when you log on to Sage CRM and a tab called **Exchange Integration Logs** is displayed in My CRM. For more information, see Reviewing Exchange Integration logs.

Synchronizing contacts

The following sections assume that your system administrator has enabled synchronization for contacts in both directions using default synchronization options and that if conflicts arise, the Sage CRM update wins.

- Synchronizing contacts from Sage CRM to Exchange
- Updating and deleting contacts in Sage CRM
- Synchronizing contacts from Exchange to Sage CRM
- Updating and deleting contacts in Exchange

Synchronizing contacts from Sage CRM to Exchange

You must flag the Sage CRM contacts that you want to synchronize.

1. Click **My CRM | Contacts**.
2. Click **Add Contacts** and search for the contacts you want to synchronize.
3. Select the required contacts. You can use **Select/Deselect All** to select all returned contacts. Click any subject heading except **Remove Contact** to sort contacts.
4. Click **Add Contacts**.
5. To add a specific group of contacts, click **Add Group Of Contacts** and click the group.
6. You can open a person record and click **Add to My Contacts** to add the person to the Contacts tab.
7. After the next synchronization, open the **Contacts** folder in Outlook and verify that it includes the contacts from Sage CRM. These contacts are tagged with the **CRM Contact** category. Double-click the contact in Outlook to view the category.

Note: When a contact is added from Sage CRM to an Exchange mailbox, deduplication takes place against **Company Name** and person's **First Name**, **Middle Name**, and **Last Name**. These values must match (this includes matching a "blank" for non-mandatory fields) for the contact to be considered a duplicate. If this happens, a link is established to the contact in Exchange.

Updating and deleting contacts in Sage CRM

When you remove contacts that have been added to your Exchange mailbox from **My CRM | Contacts**, the contacts remain in your mailbox but the link to Sage CRM is broken and the **CRM Contact** category is removed. If the contact is deleted from the Sage CRM database, the contact is completely removed from your mailbox.

Synchronizing contacts from Exchange to Sage CRM

Only contacts in the default Contact folder are synchronized with Sage CRM. If you do not want to synchronize a contact with Sage CRM, you should create it in a secondary folder.

Only those contacts that are linked to Sage CRM are synchronized from Exchange to Sage CRM. You can link a contact in Exchange to Sage CRM in one of the following ways:

- Contacts that originate from Sage CRM (**My CRM | Contacts**) are automatically linked to Sage CRM. Any updates or deletes to these contacts in Exchange are synced back to Sage CRM.
- If you or your system administrator have installed the Lite Outlook Plugin, you can add contacts to Sage CRM using the **Add Contact** button in Outlook and then synchronize the contacts using Exchange Integration. For more information, see Working with Lite Outlook Integration.

Updating and deleting contacts in Exchange

If two or more users update a contact in their Exchange mailboxes and the contact is linked to the same single contact record in Sage CRM, the most recent update wins. The change is synched back immediately to the linked contact records in the other Exchange mailboxes.

If you delete a contact in your Exchange mailbox, it's removed from **My CRM | Contacts**. The contact is not deleted from the Sage CRM database.

Synchronizing tasks

- Task synchronization business rules
- Synchronizing tasks from Sage CRM to Exchange
- Synchronizing tasks from Exchange to Sage CRM

Task synchronization business rules

The following business rules are applied during task synchronization:

- Tasks modified in the last 14 days are synchronized.
- If you create a task in Exchange and assign it to someone else, the task is not synchronized from your mailbox because you're not the task owner.
- Copies of tasks, where the mailbox owner is not the same as the task owner are not synchronized. For example, a task which has been assigned to you in Exchange, but which you have not yet accepted and therefore do not yet own, is not synchronized.
- When a task is created in Sage CRM for multiple users who are synchronized with Exchange, an owned copy of the task is created for each user in Sage CRM so the task is displayed in the task list of each user in Exchange.
- Recurring tasks are not synchronized.
- Deduplication takes place on the **Subject**, **CRM User/Exchange Owner**, **Start Date**, and **Due Date** fields. The Time section of the Date/Time fields from Sage CRM is ignored for deduplication. If the Start Date is blank in either Sage CRM or Exchange, it is ignored for deduplication purposes.
- Mass tasks, and tasks generated against groups or lists are not synchronized.

Synchronizing tasks from Sage CRM to Exchange

To create a task in Sage CRM and view it in your Exchange mailbox:

1. Create the task in Sage CRM. For more information, see Creating a task.
2. After the next synchronization, open the **Tasks** folder in Outlook and verify that it includes the task from Sage CRM. The information from the Regarding panel in Sage CRM is displayed in the body of the task in Outlook. Your system administrator can customize this text.

Synchronizing tasks from Exchange to Sage CRM

Only tasks in the default **Tasks** folder are synchronized with Sage CRM. If you do not want to synchronize a task with Sage CRM, you should create it in a secondary folder. To create a task in Exchange and view it in Sage CRM:

1. In Outlook, click **Tasks | New**.
2. Add the new task details.
3. Click **Save and Close**.
4. After the next synchronization, go to Sage CRM and check for the new task in **My CRM | Calendar**.

Synchronizing appointments

The following sections assume that your system administrator has enabled synchronization for appointments in both directions using default synchronization options and that if conflicts arise, the Exchange update wins. Appointments, where the end date is in the last 14 days, or sometime in the future, are synchronized.

- Appointment synchronization business rules
- Synchronizing appointments from Sage CRM to Exchange
- Synchronizing appointments from Exchange to Sage CRM
- Stub appointments

Appointment synchronization business rules

The following business rules are applied during appointment synchronization:

> **Note:** Please be aware that when a synchronized field on an appointment is updated, a notification is sent to all attendees. This is particularly important to note when adding confidential information to an appointment.

Synchronization direction	Business rule
Exchange to Sage CRM	Appointment synchronization is based on the organizer copy of appointment. This is because the appointment in the organizer's Exchange mailbox is the most reliable version of the appointment available to Sage CRM. Invitees see a copy of the organizer appointment in their Sage CRM calendars rather than a customized version of the invitee appointment from Exchange. The exception to this rule is when the Exchange organizer of the appointment is not a Sage CRM user enabled for synchronization, and the appointment includes invitees who are Sage CRM users enabled for synchronization. In this case, the synchronization is based on the invitee copies of the appointment, to ensure the calendars of all the Sage CRM users stay up-to-date. In this case, a read-only stub appointment is created in Sage CRM, based on the invitee copies. For more information, see Stub appointments.
Sage CRM to Exchange	Appointments created in Sage CRM, where the organizer is not enabled for synchronization do not synchronize to Exchange. For example: Susan Maye is not set up to synchronize with Exchange but William Dolan and John Finch are. In Sage CRM, Susan Maye creates an appointment and adds William Dolan and John Finch to the appointment. This appointment never appears in the Exchange mailboxes of any of the three users. An Exchange Info message is displayed on the appointment stating that the appointment is not synchronized.
Bidirectional (Exchange to Sage CRM and Sage CRM to Exchange)	Recurring appointments, where the end date of the recurrence pattern is in the last 14 days, or sometime in the future, are synchronized. Deduplication takes place on the **Subject**, **Organizer**, **Start Time**, and **End Time**, and **All Day Event** fields. The values in all these fields must match for the appointment to be considered a duplicate. For recurring appointments, the **Recurrence pattern** and **Range** must also match to be considered a duplicate.

Synchronizing appointments from Sage CRM to Exchange

To create an appointment in Sage CRM and view it in your mailbox:

1. Create the appointment in Sage CRM. For more information, see Creating an appointment.
2. After the next synchronization, the appointment synchronizes to the Organizer's mailbox, and Exchange sends out meeting requests. Open the **Calendar** folder in Outlook and verify that it includes the appointment from Sage CRM.

   The information from the Regarding panel in Sage CRM is displayed in the body of the appointment in Outlook. Your system administrator can customize this text.

   Each person with a valid email address added to the External Attendees tab of the appointment is sent a meeting invitation through Exchange.

   If the email address of a Resource user in Sage CRM matches a mailbox address in Exchange, then the resource displays in Exchange as a resource attendee.

Synchronizing appointments from Exchange to Sage CRM

Only appointments in the default Calendar are synchronized with Sage CRM. If you do not want to synchronize an appointment with Sage CRM, you should create it in a secondary folder.

To create an appointment in Exchange and view it in Sage CRM:

1. In Outlook, click **Calendar | New**.
2. Enter the new appointment or meeting request details. You can add the customer contact to the Required attendee list if you want to send him an invitation to the meeting.
3. To make the appointment or meeting invisible to Sage CRM users who are not in the list of attendees, mark the appointment or meeting as private in Outlook.
4. Click **Save and Close** or **Send**.
5. After the next synchronization, go to Sage CRM and locate the new appointment in **My CRM | Calendar**.
    - All appointment attendees are displayed on the External Attendees tab. Only email addresses are displayed for the appointment attendees who do not have associated Person records in Sage CRM or are not registered as Sage CRM users. No linked contact or communication is displayed anywhere else in Sage CRM.
    - If your Exchange appointment includes a customer who exists in your Sage CRM database, the customer is listed as an External Attendee. An appointment record is displayed in the **Communications** tab of the customer record in Sage CRM.
    - Attendees from Exchange, whose mailboxes map to Resource user email addresses in Sage CRM, are added to the **User** list in Sage CRM. If they do not map to Resource user email addresses in Sage CRM, they are added to the **External Attendees** tab in Sage CRM.

Stub appointments

Exchange Integration usually synchronizes appointments based on the organizer's copy of an appointment. Invitees who are Sage CRM users enabled for synchronization can view a copy of the appointment in their Sage CRM calendars.

The exception to this synchronization rule is when the Exchange organizer of the appointment is not a Sage CRM user enabled for synchronization, and the appointment includes invitees who are Sage CRM users enabled for synchronization. In this case, the synchronization is based on the invitee copies of the appointment, to ensure the calendars of all Sage CRM users stay up-to-date.

These invitee copies of appointments are called stub appointments. They are read-only. Click the **Exchange Sync Info** icon in the top left of the page to display information about the status of the appointment.

Reviewing Exchange Integration logs

Note: Your system administrator must grant you permissions to view the **Exchange Integration Logs** tab in Sage CRM.

To view Exchange Integration logs:

1. Click **My CRM | Exchange Integration Logs**.
2. Select a log from **Select log files**. The list contents depend on the synchronization options set by your system administrator.
3. Click the log to open it.

The **Skippeditems** log file contains information about appointments and tasks which could not be synchronized. The following scenarios cause items to be skipped rather than synchronized.

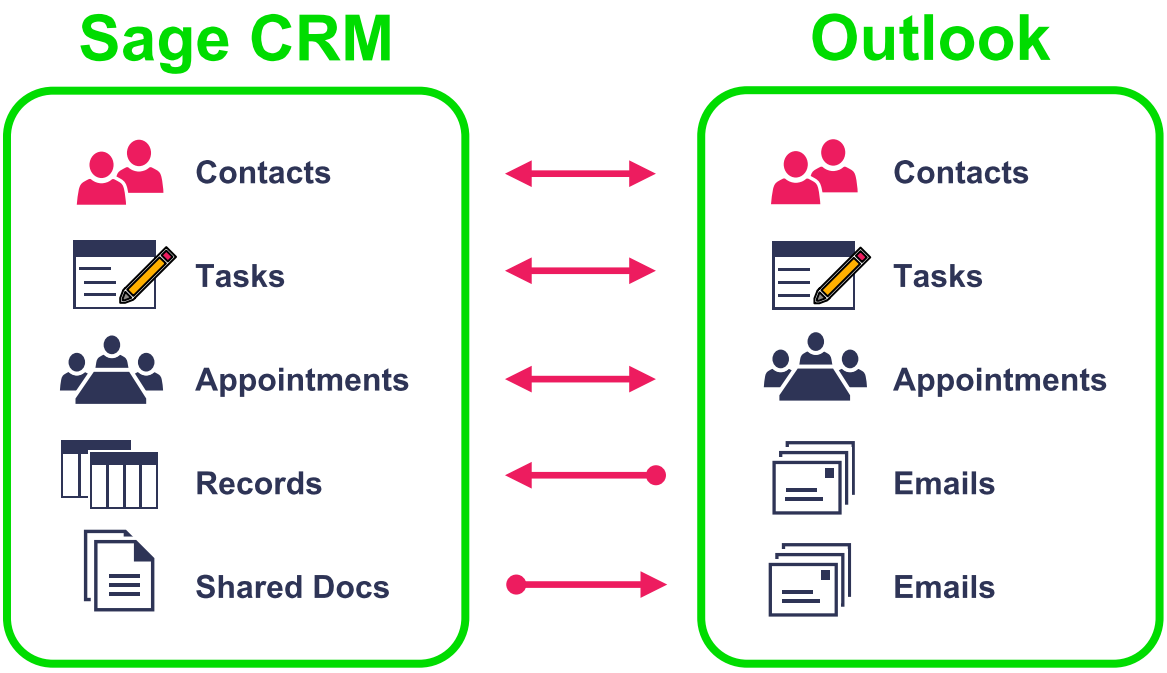
Item	Scenario where item is not synchronized
Mailbox appointment	• Recurring appointment where the recurrence range results in the number of occurrences of the mailbox series exceeding the **Maximum Number of Occurrences** allowed in Sage CRM. This is set by your system administrator in the System Behavior settings. • Recurring appointment with no end date. • Yearly recurring appointment with a relative day of the week specified (a day, weekday or weekend-day) in the recurrence pattern. • Monthly recurring appointment with a recurrence pattern such as “the fourth day/weekday/weekend day of every [x] months”.
Sage CRM appointment	• Appointment (single or recurring) where the organizer is a Sage CRM Sync User but is not present in the Sage CRM user list for the appointment (is not attending the meeting). • Recurring appointment where the **Daily Pattern** is set to **Occurs Every**. • Appointment with **End Time** set to a date before the current synchronization date. This means that older appointments are not synchronized by design. A warning message is logged: *Appointment is too old*.
Mailbox task	• Recurring mailbox task. • Mailbox task where the owner of the task is not the owner of the mailbox in question.

Item	Scenario where item is not synchronized
Sage CRM task	• Task with **Due Date** set to a date before the current synchronization date. This means that older tasks are not synchronized by design. A warning message is logged: *Task is too old*. • Task in your task list that's owned by another user. A warning message is logged: *Reason: Task is reassigned*.

Classic Outlook Integration

- About Classic Outlook Integration
- Working with the Classic Outlook Plugin
- Synchronizing Sage CRM and Outlook
- Working with Classic Outlook Integration

About Classic Outlook Integration



Classic Outlook Integration synchronizes contacts, appointments, and tasks between Sage CRM and Microsoft Outlook. It also lets you file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails.

Depending on how your system administrator configures Classic Outlook Integration, you can synchronize data from Sage CRM to Outlook only, from Outlook to Sage CRM only, or both ways.

The first synchronization synchronizes:

- Recurring appointments.
- Appointments which have been modified in the last 14 days.
- Appointments with an end date between the last 14 days and today.
- Tasks which have been modified in the last 14 days.
- Tasks with a status of Pending or In Progress.
- Any flagged Sage CRM contacts, or contacts that have been added to the Contacts tab in Outlook.

Subsequent synchronizations synchronize:

- Appointments modified since the last synchronization.
- Tasks modified since the last synchronization.
- Any new, updated, or deleted flagged Sage CRM contacts, or any new, updated, or deleted contacts on the Contacts tab in Outlook. If a synchronized Sage CRM contact shares an address with another person or company, and you change the address in Outlook, Sage CRM updates the shared address with the new information during Contact synchronization.

How to use Classic Outlook Integration

To use Classic Outlook Integration, you must download the Classic Outlook Plugin in Sage CRM. You can download the plugin on a 32-bit machine only.

When you've successfully installed the Classic Outlook Plugin, a CRM ribbon is displayed in Outlook so you can use Classic Outlook Integration features. The ribbon contains a CRM Actions group that lets you file emails and add Outlook contacts to Sage CRM. It also contains a Synchronization group that lets you initiate a synchronization, review conflicts and skipped items, and reset synchronization mappings. For more information, see Classic Outlook Integration menu options.

Task	Help
Complete the mandatory requirements for installing the Classic Outlook Plugin on your computer.	Preparing to install the Classic Outlook Plugin
Download and install the Classic Outlook Plugin on your computer.	Installing the Classic Outlook Plugin

Task	Help
Flag the Sage CRM contacts that you want to synchronize with Outlook. You can manually synchronize them straight away or wait until the next scheduled synchronization when they'll be automatically added to Outlook.	Adding contacts from Sage CRM to Outlook
Manually add Outlook contacts to Sage CRM. These contacts are included in all future synchronizations.	Adding contacts from Outlook to Sage CRM
Create a new appointment or task in Sage CRM and add it to your Outlook calendar.	Scheduling appointments and tasks in Sage CRM
Create a new appointment or task in Outlook and add it to your Sage CRM calendar.	Scheduling appointments and tasks in Outlook
Attach a shared document to an Outlook email that’s synchronized with Sage CRM.	Attaching shared documents using Classic Outlook Integration
File an Outlook email against a Sage CRM record.	Filing emails using Classic Outlook Integration
You might have to reinstall the Classic Outlook Plugin if a new version of the plugin is released. You can check the plugin version in your browser tools.	Reinstalling the Classic Outlook Plugin
If there's a problem installing the plugin, your system administrator might advise you to uninstall it and then install it again. Or you might decide to switch to using Lite Outlook Integration, in which case you need to uninstall the Classic Outlook plugin first.	Uninstalling the Classic Outlook Plugin

How to resolve synchronization issues

If you run into any issues when synchronizing information between Sage CRM and Classic Outlook Integration, you can do the following.

Task	Help
Open the conflict log to view synchronization conflicts and then resolve those conflicts. Conflict information is generated if two users change the same information in Sage CRM or Outlook since the last synchronization and the system administrator has set the appropriate User Configuration settings.	Viewing synchronization conflicts
Open the skipped items log to view information about appointments, tasks, or contacts that could not be synchronized. Fix the issue if possible.	Viewing skipped items
If you're unable to synchronize information between Sage CRM and Outlook, your system administrator might advise you to uninstall the plugin and then install it again.	Uninstalling the Classic Outlook Plugin

Working with the Classic Outlook Plugin

- Preparing to install the Classic Outlook Plugin
- Installing the Classic Outlook Plugin
- Reinstalling the Classic Outlook Plugin
- Uninstalling the Classic Outlook Plugin

Preparing to install the Classic Outlook Plugin

There are several mandatory requirements for installing the plugin.

- In Outlook, ensure your email address is specified in **File | Account Settings | Email** and **File | Account Settings | Data Files**. You should also use this email address in Sage CRM.
- Ensure your email account runs on Microsoft Exchange Server or is a POP3 email account.
- Ensure you're running a supported version of Outlook. For more information, see the *Software Requirements and Mobile Features* guide posted on the Sage CRM Help Center.
- Ensure you're a local administrator of your machine and that Classic Outlook Integration is enabled. You can ask your system administrator if you don't know.
- Close Microsoft Outlook.
- Open Sage CRM in Internet Explorer 11. If you're using Edge, click the **More actions** icon (the ellipses at the top right) and then select **Open with Internet Explorer**.
- In IE, click **Tools | Compatibility View settings** and clear **Display intranet sites in Compatibility view**.
- In Sage CRM, check that your time zone is set correctly. Click **<My Profile> | Preferences** and check the **Time Zone** field.
- If you're unable to run .exe files as an Administrator, you must turn off User Account Control Settings (UAC) on your computer. UAC notifies you before changes that require administrator-level permission are made to your computer. Go to **Control Panel** and type *UAC* in the search box. Click **Change User Account Control Settings** and move the slider to **Never notify**. Restart your computer if you're prompted to do so. You can turn on UAC back on after you've installed the plugin.

Installing the Classic Outlook Plugin

1. In Sage CRM, click **<My Profile> | Preferences**.
2. If you're prompted to install a client component, click **Install**.
3. Click **Install Classic Outlook Integration**
4. If the Microsoft .NET Framework is not already installed on your computer, you're prompted to install it. When the .NET Framework is installed, click **Continue**.

5. Verify the information in the security warning. If the plugin has been installed by another user on the current client, the .NET Framework Download and Security Warning dialog boxes are not displayed.
6. Save the plugin file (CRMClientSetup.exe) to your desktop.
7. Right-click **CRMClientSetup.exe** and select **Run as Administrator**. Click **Next** to move through the install wizard. If **Run as Administrator** is not available, turn off UAC settings on your computer. For more information, see Preparing to install the Classic Outlook Plugin.
8. Log off Sage CRM, and close IE and Outlook before continuing with the installation. Check Task Manager to ensure IE and Outlook are closed.
9. Select the **Complete** setup type and click **Next**. The table below explains the Classic Outlook Plugin Connection Settings that are displayed during installation. You don't have to change these settings.
10. Click **Install** and then click **Finish**.
11. Open Outlook to view the Sage CRM ribbon. For more information, see Classic Outlook Integration menu options.
12. Sometimes Classic Outlook Integration is disabled by default when the plugin is installed. If the Sage CRM ribbon isn't displayed in Outlook, do the following:
    a. Go to **File | Manage Add-ins | Disabled Items**
    b. Click **Go** and enable the plugin.
    c. Click **OK**. Restart Outlook to see the changes.
    d. If the Classic Outlook Integration features still aren't displayed, go to **File | Manage COM Add-ins**
    e. Click **Go** and select the plugin.
    f. Click **OK**. Restart Outlook to see the changes.

Field	Description
Server Name	The Sage CRM server name. This is automatically populated from the Sage CRM server.
Install Name	Sage CRM install name. This is automatically populated from the Sage CRM server.
Port Number	Defaults to 80. Contact your system administrator if you need to change this port. For example, if HTTPS is used, you might need a different port.
Use Secure Connection HTTPS	Select to use an HTTPS connection
User Name	This is automatically populated from the Sage CRM server.
Domain	The Exchange Server domain name.

Reinstalling the Classic Outlook Plugin

You might have to reinstall the Outlook Plugin if a new version of the plugin is released. You can check the plugin version in your browser.

1. Click **<My Profile> | Preferences**.
2. Click **Reinstall Classic Outlook Integration**. The new version of the plugin loads the next time you start Outlook.

Uninstalling the Classic Outlook Plugin

Before you uninstall the plugin, you should ensure you're a local administrator of your machine. You can ask your system administrator if you don't know or if you are not comfortable performing the following steps.

1. Turn off User Account Control Settings (UAC) on your computer. UAC notifies you before changes that require administrator-level permission are made to your computer. Go to **Control Panel | User Accounts | User Accounts | Change User Account Control Settings** and click **OK**. Restart you computer if you're prompted to do so. You can turn on UAC back on after you've uninstalled the plugin.
2. Close all browsers.
3. Open Outlook and click **CRM | Uninstall** on the Outlook ribbon.
4. Click **OK** and close Outlook.
5. On your computer, click **Start** and type *cmd* in the **Search** field.
6. Right-click **cmd.exe** and select **Run as administrator**.
7. Enter the following command to go to the Downloaded Program Files folder:
   ```
   cd %WinDir%\Downloaded Program Files
   ```
8. Execute the following commands:
   ```
   regsvr32 -u OtlTools.ocx
   del OtlTools.*
   ```
9. Navigate to the directory where the plugin is installed. This is usually **%ProgramFiles (x86)%\Sage\CRM Client\Outlook Plugin**.
10. Execute the following commands:
    ```
    regsvr32 -u crmoutlookplugin.ocx
    regsvr32 -u crmoutlookplugin2.dll
    del *.*
    ```
11. Delete or rename the following folders:
    - **%userprofile%\AppData\Roaming\ACCPAC**
    - **%userprofile%\AppData\Roaming\Sage**

12. Remove the plugin from the list of enabled add-ons in IE.
    a. In IE, go to **Tools | Manage add-ons**.
    b. Select **All add-ons** from the **Show** drop-down in the left panel.
    c. Right-click the Outlook add on and click **More information**.
    d. Click **Remove** and then click **Close**.

Synchronizing Sage CRM and Outlook

- Classic Outlook Integration menu options
- Adding contacts from Sage CRM to Outlook
- Adding contacts from Outlook to Sage CRM
- Scheduling appointments and tasks in Sage CRM
- Scheduling appointments and tasks in Outlook
- Viewing synchronization conflicts
- Viewing skipped items

Classic Outlook Integration menu options

When you install the Classic Outlook Plugin, a Sage CRM ribbon is displayed in Outlook. The ribbon includes a **CRM Actions** group and a **Synchronization** group. When you click a button on the ribbon and you are not already logged on to Sage CRM, you're prompted to log on. Enter your Sage CRM username and password and click **OK**.

The following table explains the **CRM Actions** group.

CRM Actions group	Description
File Email	Files single or multiple email records with the company or person record in Sage CRM.
Add Contact	Adds the selected Outlook contact to Sage CRM.

The following table explains the **Synchronization** group.

Synchronization group	Description
Sync	Initiates a synchronization between Sage CRM and Outlook.
View Conflict Log	Displays synchronization conflicts to field-level detail.
View Skipped Items	Displays details about items that were skipped during synchronization. For more information, see Viewing skipped items.
Sync Info Reset	Resets mappings between synchronized contacts, appointments, and tasks to the state they were in after the first synchronization.

Synchronization group	Description
Options	Opens the CRM Options screen.
Uninstall	Uninstalls the Sage CRM Outlook Plugin.

The following table explains the fields on the CRM Options screen. To open this screen, click the **Options** button in the Synchronization group. Alternatively, click **Options** on the Sage CRM log on screen to open the CRM Options screen.

CRM Options	Description
Server Name	Sage CRM install server name. To change the default port (80), add the alternative port after the server name. For example, *JUPITER:1234 [Server Name]:[HTTP port]*
Install Name	Sage CRM install name.
Use HTTPS	Uses an HTTPS connection. To change the default HTTPS port (443), add the alternative port after the server name. For example, *JUPITER:10443 [Server Name]:[HTTPS port]*
Sync Every (mins)	Sets the automatic synchronization interval.
Show Conflicts	Displays Synchronization Conflicts window after each synchronization when in Auto Synch mode (the system administrator sets the automatic synchronization interval).
Warning if sync is to delete more than	Displays a dialog box if more than the specified number of records will be deleted in Sage CRM as a result of a synchronization.

Adding contacts from Sage CRM to Outlook

You must flag the Sage CRM contacts that you want to synchronize with Outlook.

1. Click **My CRM | Contacts**.
2. Click **Add Contacts** and search for the contacts you want to add to Outlook.
3. Select the required contacts. You can use **Select/Deselect All** to select all returned contacts. Click any subject heading except **Remove Contact** to sort contacts.
4. Click **Add Contacts**.
5. To add a specific group of contacts, click **Add Group Of Contacts** and click the group.
6. You can open a person record and click **Add to My Contacts** to add the person to the **Contacts** tab.

7. Click **Sync** on the Outlook ribbon to synchronize the contacts to Outlook. For more information, see Classic Outlook Integration menu options. If any conflicts occur during synchronization, a dialog box is displayed allowing you to review the conflicts. Alternatively, wait until the next automatic synchronization.
8. In Outlook, click the **Contacts** folder and verify that it includes the contacts from Sage CRM. These contacts are tagged with the CRM Contact category. Double-click the contact in Outlook to view the category.

If a synchronized Sage CRM contact shares an address with another person or company, and you change the address in Outlook, the shared address is updated in Sage CRM during contact synchronization.

Adding contacts from Outlook to Sage CRM

You must manually add Outlook contacts to Sage CRM. If you change company information for a contact in Outlook, you must manually update the company information for the contact in Sage CRM because it's not automatically updated when contacts are synchronized.

Be aware that you can't add a contact from Outlook to Sage CRM if the Outlook contact includes company information and you do not have insert rights to the company entity in Sage CRM. To add the contact in this case, you must either be given rights to insert company data by your system administrator or you must remove the company information from the Outlook record.

Sage CRM field level security is not applied to required fields in Outlook. For example, if you delete the contents of a required field in an Outlook contact and then synchronize with Sage CRM, you are not warned that a required field has not been populated.

1. In Outlook, click the **People** tab at the bottom of the screen.
2. Highlight the contact you want to add to Sage CRM.
3. Click **Add Contact** on the CRM ribbon.
4. If the Outlook contact contains a company, a dedupe is performed on the company name.
    - If a company match is detected in Sage CRM, a list of matches is displayed. You can select a matching company or ignore the duplicates.
    - If you select a matching company, a dedupe is performed on the person and duplicates are displayed. If no duplicates are detected, the New Person screen is displayed in Sage CRM within Outlook with the existing contact details from Outlook filled in.
    - If a company match is not detected, or if a match is detected and you ignore it, a new company that includes the person details on the Person panel is automatically created using the Company name from Outlook.
5. If the Outlook contact does not have an associated company, a dedupe is performed on the person name.
    - If a person match is detected in Sage CRM, a list of matches is displayed. You can select a matching person or ignore the duplicates.

- To create a company for the contact in Sage CRM, click **New Company** on the Person details screen.

6. Click **Save** to save the contact in Sage CRM. The contact is added to the **Contacts** tab and is included in future synchronizations. When a contact is added from Outlook to Sage CRM, the Outlook Plugin automatically synchronizes with Sage CRM on contacts only. This is to ensure that additional information entered in Sage CRM is reflected in Outlook.
7. Any Outlook contact that's synchronized with Sage CRM is linked to detailed customer interaction history in Sage CRM. To view this history, click **Contacts** in Outlook. Select the contact and click **View Contact**.The **Person Summary** tab for the contact is displayed.

Scheduling appointments and tasks in Sage CRM

1. Open Sage CRM and create an appointment or task with a contact. For more information, see Creating an appointment and Creating a task.
2. Switch to Outlook and click **Sync**. For more information, see Classic Outlook Integration menu options. The appointment or task is displayed in your Outlook Calendar.
   - An All Day Event in Sage CRM becomes an All Day Event in Outlook.
   - When you create an appointment in Sage CRM and link it to a person or company, the selected company or person is displayed in the body of the appointment in Outlook.
   - If you create an appointment in Sage CRM with a person who does not have an associated email address, for example, a Resource user such as London Meeting Room, the appointment is synchronized with Outlook, but the user is not displayed in the appointment in Outlook.
   - Private appointments and tasks are not synchronized between Sage CRM and Outlook.
   - Recurring appointments created in Sage CRM are synchronized to Outlook.
   - Sage CRM allows you to have more than one recurring appointment from a series occurring on the same day, but Outlook does not.

Scheduling appointments and tasks in Outlook

1. In Outlook, click the **Calendar** folder or the **Tasks** folder.
2. Click **Home | New Task** or **Home | New Appointment**.
3. Complete the details. If you set a reminder, it pops up in Outlook as a reminder and in Sage CRM as an onscreen notification when the appointment or task is synced. You can add a contact to the task in Outlook, but it's not reflected in Sage CRM even if the contact is in Sage CRM.
4. Click **Save and Close**.
5. Click **Sync**.
6. In Sage CRM, click **My CRM | Calendar** to see the appointment or task.
   - Tasks that you create in Outlook have the default completion time of 12 noon in **Due Date** in Sage CRM.

- An All Day Event in Outlook becomes an All Day Event in Sage CRM.
- If you create an appointment in Outlook for a non-Sage CRM user, the user's email addresses appear in the Sage CRM appointment at the end of the screen.
- If you create an appointment in Outlook for multiple Sage CRM users, multiple users are listed against the appointment in Sage CRM—as long as email addresses have been set up against the user. The Outlook meeting organizer is displayed in the Organizer field in Sage CRM.
- If you create an appointment with a person in Sage CRM, the person's email address appears in the list of attendees in Outlook. You cannot see in Sage CRM if the person has accepted the meeting and can attend.
- Classic Outlook Integration supports the default Outlook Calendar only.
- Private appointments and tasks are not synchronized between Outlook and Sage CRM.
- When creating a recurring appointment in Outlook, you must select an End By date on the recurrence dialog box if you want the appointment to be synched to Sage CRM. Recurring tasks are not synchronized from Outlook to Sage CRM.
- The default maximum number of occurrences allowed in Sage CRM is 200. Your system administrator sets this value. If you create a recurring appointment in Outlook with a greater number of occurrences, the appointments are not synchronized.

Viewing synchronization conflicts

Conflict information is generated if two users change the same information in Sage CRM or Outlook since the last synchronization and the system administrator has set the appropriate User Configuration settings. For example, an appointment is created in Outlook starting at 4pm, finishing at 5.30pm.

The appointment is synchronized, and is displayed in Sage CRM. Before the next synchronization takes place, one user changes the end time to 4.30pm in Sage CRM, and another user changes the end time to 6 pm in Outlook. When synchronization takes place, the appointment end time is updated to 6pm in Sage CRM and Outlook, and a conflict is displayed in Outlook.

1. In Outlook, click **CRM | View Conflict Log**.
2. Click the conflict you want to view in **List of Logged Conflicts**. The left side of the Conflict Details panel shows the field or fields where a conflict has arisen. The right side of the panel shows the values before synchronization.
    - **Hide Empty Fields and Hide Equal**. Hides or shows fields where the values are the same in Outlook and Sage CRM.
    - **Clear Log**. Clears all conflicts from the list of logged conflicts.
    - **Delete Selected**. Clears the selected conflict from the list of logged conflicts.
    - **Copy Details**. Copies the Outlook value to the clipboard so you can reinstate it.
    - **Help**. Displays the Sage CRM help page that describes synchronization conflicts.
3. Scroll to highlighted field to review the conflict.
4. Click **Close** to close the Synchronization Conflicts window.

Viewing skipped items

The Skippeditems log file contains information about appointments, tasks, or contacts which could not be synchronized.

1. In Outlook, click **CRM | View Skipped Items** to open the Skippeditems log file.

   ```
   ***Problem gathering data for item***
   Logged on:25/07/2008 10:32:43
   Type: Recurring appointment
   Subject: app2
   Date & time: 25/07/2008 09:00:00
   Action:Compiling XML with item to be sent to Sage CRM server
   Server ID:0
   Outlook unique ID:2254403268
   Cause:Exception raised: Incompatible recurrence pattern (no end date)
   Logged at:MJ1024
   ```

   The file has the following elements:

   - **Logged on**. The time at which the problem occurred.
   - **Type**. The area in which the problem occurred.
   - **Subject** and **Date & Time**. For appointments and tasks.
   - **Action**, **Server ID**, **Outlook Unique ID**, **Logged At**. This is additional information for your system administrator or Support team.
2. Review the log file and fix the issues listed. If you cannot fix an issue, talk to your system administrator. Below are the most common causes of skipped items:
   - Incorrect recurring appointment pattern type, specifically where no end date has been set in Outlook.
   - An appointment created in Outlook, which has no subject and no body text.
   - A task created in Outlook, which has no subject and no body text.
   - A user was added to only one occurrence of recurring appointment.
   - A contact in Outlook has an empty first and last name.
   - When a recurring appointment is created and the meeting organizer and invitees synchronize, but the meeting organizer later changes one of the occurrences in the series and sends the update to the invitees.
   - An invitee of a recurring appointment tries to synchronize an appointment, where they are invited to only one or some of the occurrences of the series.

Working with Classic Outlook Integration

- Attaching shared documents using Classic Outlook Integration
- Filing emails using Classic Outlook Integration

Attaching shared documents using Classic Outlook Integration

You can attach documents from the **Shared Documents** tab in Sage CRM to emails sent from Outlook.

1. In Outlook, click **Home | New Email**.
2. Fill in the details of the email.
3. Click the **Add-Ins** menu on the new email window and then click **Attach Shared Doc**. The list of available shared documents is displayed.
4. Select **Attach** beside the document you want to attach to the email.
5. Click **Attach**. The selected document is added to your email as an attachment.

Filing emails using Classic Outlook Integration

You can file one or more emails that are in your Outlook folders to Sage CRM. When you file a single email, Sage CRM tries to match the email address on the Outlook email with an email address in Sage CRM. When you file several emails at once, Sage CRM looks for a match with the first email address in the batch of emails. If no match is found for the first email address, you must manually match the email batch to a record in Sage CRM. When you're filing batches of emails, ensure all emails have the same email address.

In Sage CRM you can open the **Communications** tab on a Company or Person record and then drag and drop an email from Outlook directly onto the Document Drop icon. This method stores the entire email as an attachment to the Communication record. Alternatively, complete the following steps:

1. To file an email that's in an Outlook folder, select the email you want to file and click **File email** on the Sage CRM ribbon.
2. To file a new email that you're sending from Outlook, click **Home | New | New Email** and fill in the details of the email. Then click the **Sage CRM** menu and click **Send and File**.
3. To select the Company or Person records to file the email against, click **Add** in the **File emails** panel and search for the required record. If you select multiple Person records, the email is filed as a Communication record against each target specified. If you do not link the email with a Company or Person, the Communication record becomes an orphan record in Sage CRM and is difficult to find. When you file an email against a Company or Person record, the email inherits the territory of the company or person (in that order), depending on your insert rights for those territories.

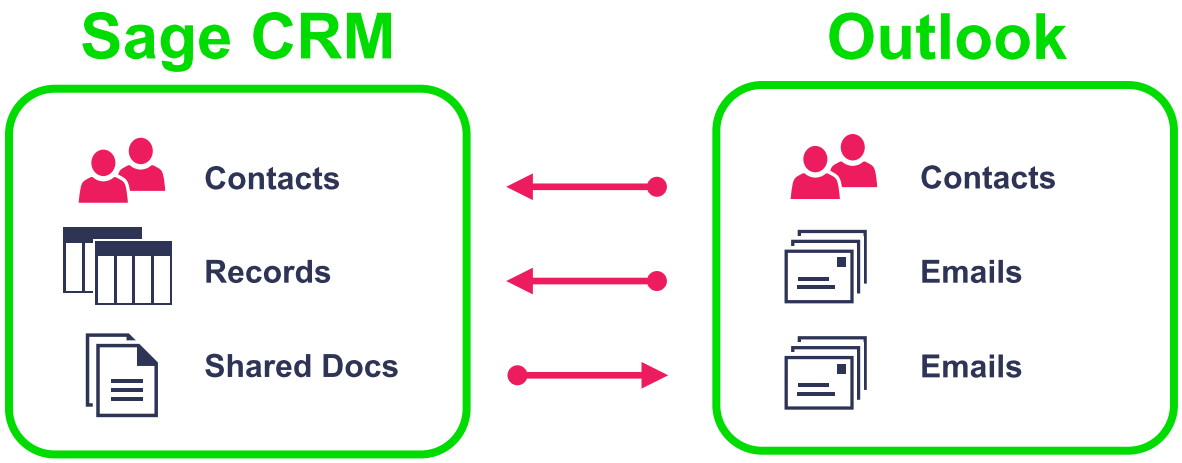
4. Specify filing options:
    - **Status**. The current status of the email (Canceled, Complete, Pending, or In Progress).
    - **File By Date and Time**. File the email by the date and time at which it was received or by the current date and time.
    - **Action**. The action type under which to file the email. For example, Email In, Email Out, or Meeting.
5. Click **File email** to file the email in Sage CRM and return to Outlook. Alternatively, click **File and View** to view the Communication record in Sage CRM before you file it.

You can restrict certain types of files being uploaded into Sage CRM using Document Drop but these restrictions do not apply to email attachments.

Lite Outlook Integration

- About Lite Outlook Integration
- Working with the Lite Outlook Plugin
- Working with Lite Outlook Integration

About Lite Outlook Integration



Lite Outlook Integration lets you add contacts from the Outlook client to Sage CRM, file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. Lite Outlook Integration does not synchronize any data between Outlook and Sage CRM. For this reason, it should be used with Exchange Integration. For more information, see About Exchange Integration.

How to use Lite Outlook Integration

To use Lite Outlook Integration, you must download the Lite Outlook Plugin in Sage CRM. You can download the plugin on a 32-bit or a 64-bit machine. When you've successfully installed the Lite Outlook Plugin, a Sage CRM ribbon is displayed in Outlook. For more information, see Lite Outlook Integration menu options.

Task	Help
Complete the mandatory requirements for installing the Lite Outlook Plugin on your computer.	Preparing to install the Lite Outlook Plugin
Download and install the Lite Outlook Plugin on your computer.	Installing the Lite Outlook Plugin
Attach a shared document to an Outlook email that's synchronized with Sage CRM.	Attaching shared documents using Lite Outlook Integration
File one or more Outlook emails against Sage CRM records.	Filing emails using Lite Outlook Integration
Manually add Outlook contacts to Sage CRM.	Adding contacts using Lite Outlook Integration
You might have to reinstall the Lite Outlook Plugin if a new version of the plugin is released. You can check the plugin version in your browser tools.	Reinstalling the Lite Outlook Plugin
If there's a problem installing the plugin, your system administrator might advise you to uninstall it and then install it again. Or you might decide to switch to using Classic Outlook Integration, in which case you need to uninstall the Lite Outlook plugin first.	Uninstalling the Lite Outlook Plugin

Working with the Lite Outlook Plugin

- Preparing to install the Lite Outlook Plugin
- Installing the Lite Outlook Plugin
- Reinstalling the Lite Outlook Plugin
- Uninstalling the Lite Outlook Plugin

Preparing to install the Lite Outlook Plugin

There are several mandatory requirements for installing the plugin.

- Ensure your email account runs on Microsoft Exchange Server or is a POP3 email account.
- Ensure you're running a supported version of Outlook. For more information, see the *Software Requirements and Mobile Features* guide posted on the Sage CRM Help Center.
- In Outlook, ensure your email address is specified in **File | Account Settings | Email** and **File | Account Settings | Data Files**.
- Ensure you're an administrator of your machine and that either Lite Outlook Integration or Exchange Integration has been enabled. Ask your system administrator if you don't know.
- Ensure you are viewing Sage CRM in Internet Explorer. If you're using Edge, click the **More actions** icon (the ellipsis at the top right) and then select **Open with Internet Explorer**.
- In Internet Explorer, click **Tools | Compatibility View settings** and deselect **Display intranet sites in Compatibility view**.
- In Sage CRM, check that your time zone is set correctly. Click **<My Profile> | Preferences** and check the **Time Zone** field.
- If you're unable to run .exe files as an Administrator, you must turn off User Account Control Settings (UAC) on your computer. UAC notifies you before changes that require administrator-level permission are made to your computer. Go to Control Panel and type *UAC* in the search box. Click **Change User Account Control Settings** and move the slider to **Never notify**. Restart your computer if you're prompted to do so. You can turn on UAC back on after you've installed the plugin.

Installing the Lite Outlook Plugin

1. In Sage CRM click **<My Profile> | Preferences**.
2. If you're prompted to install a client component, click **Install**.
3. Click **Install Lite Outlook Integration**.
4. If the Microsoft .NET Framework is not already installed on your computer, you're prompted to install it. When the .NET Framework is installed, click **Continue**.

5. Verify the information in the security warning. If the plugin has been installed by another user on the current client, the .NET Framework Download and Security Warning dialog boxes are not displayed.
6. Save the plugin file (CRMClientSetup.exe) to your desktop.
7. Right-click **CRMClientSetup.exe** and select **Run as Administrator**. Click **Next** to move through the install wizard. If **Run as Administrator** is not available, turn off UAC settings on your computer. For more information, see Preparing to install the Lite Outlook Plugin.
8. Log off Sage CRM, and close IE and Outlook before continuing with the installation. Check Task Manager to ensure IE and Outlook are closed.
9. Select the **Complete** setup type and click **Next**. The table below explains the Lite Outlook Plugin Connection Settings that are displayed during installation. You don't have to change these settings.
10. Click **Install** and then click **Finish**.
11. Open Outlook to view the Sage CRM Lite Outlook Integration features.
12. Sometimes Lite Outlook Integration is disabled by default when the plugin is installed. If the Sage CRM ribbon isn't displayed in Outlook, do the following:
    a. Go to **File | Manage Add-ins | Disabled Items**
    b. Click **Go** and enable the plugin.
    c. Click **OK**. Restart Outlook to see the changes.
    d. If the Lite Outlook Integration features still aren't displayed, go to **File | Manage COM Add-ins**
    e. Click **Go** and select the plugin.
    f. Click **OK**. Restart Outlook to see the changes.

Field	Description
Server Name	The Sage CRM server name. This is automatically populated from the Sage CRM server.
Install Name	Sage CRM install name. This is automatically populated from the Sage CRM server.
Port Number	Defaults to 80. Contact your system administrator if you need to change this port. For example, if HTTPS is used, you might need a different port.
Use Secure Connection HTTPS	Select to use an HTTPS connection.
User Name	This is automatically populated from the Sage CRM server.
Domain	The Exchange Server domain name.

Reinstalling the Lite Outlook Plugin

You might have to reinstall the Outlook Plugin if a new version of the plugin is released. You can check the plugin version in your browser.

1. Click **<My Profile> | Preferences**.
2. Click **Reinstall Lite Outlook Integration**. The new version of the plugin loads the next time you start Outlook.

Uninstalling the Lite Outlook Plugin

Before you uninstall the plugin, you should ensure you're a local administrator of your machine. You can ask your system administrator if you don't know or if you are not comfortable performing the following steps.

1. Close all browsers and Outlook.
2. Open the list of installed programs. For example, click **Control Panel | Programs | Uninstall a program**.
3. Right-click **Sage CRM Client Applications** and click **Uninstall**. Follow the steps on screen.
4. On your computer, click **Start** and type *cmd* in the **Search** field. Right-click **cmd.exe** and select **Run as administrator**.
5. Enter the following command to go to the **Downloaded Program Files** folder:

   ```
   cd %WinDir%\Downloaded Program Files
   ```

6. Execute the following commands:

   ```
   regsvr32 -u crmoutlookplugin2.dll
   regsvr32 -u crmoutlookplugin2x64.dll
   del crmoutlookplugin2.dll*
   regsvr32 -u OtlTools.ocx
   del OtlTools.*
   ```

7. Browse to **%ProgramFiles(x86)%\Sage** and delete or rename the **CRM Client Tools** folder (if present).
8. Browse to **%AppData%** and delete or rename the **Sage** folder.

Working with Lite Outlook Integration

- Lite Outlook Integration menu options
- Attaching shared documents using Lite Outlook Integration
- Filing emails using Lite Outlook Integration
- Adding contacts using Lite Outlook Integration

Lite Outlook Integration menu options

When you install the Lite Outlook Plugin, a Sage CRM ribbon is displayed in Outlook. When you click a button on the ribbon and you are not already logged on to Sage CRM you're prompted to log on. Enter your Sage CRM user name and password and click **OK**.

For more information on how to install the Lite Outlook Plugin, see Installing the Lite Outlook Plugin.

Option	Location / Description
File email	Lets you file one or more selected Outlook emails to Sage CRM.
Add contact	Lets you add a selected Outlook contact to Sage CRM.
Help	Launches Sage CRM help for Lite Outlook Integration.
About	Plugin version information.

Attaching shared documents using Lite Outlook Integration

You can attach documents from the **Shared Documents** tab in Sage CRM to emails sent from Outlook.

1. In Outlook, click **Home | New | New Email**.
2. Click the **Sage CRM** menu and then click **Attach Shared Doc**. The list of available shared documents is displayed.
3. Select **Attach** beside the document you want to attach to the email.
4. Click **Attach**. The selected document is added to your email as an attachment.

Filing emails using Lite Outlook Integration

You can file one or more emails that are in your Outlook folders to Sage CRM. When you file a single email, Sage CRM tries to match the email address on the Outlook email with an email address in Sage CRM. When you file several emails at once, Sage CRM looks for a match with the first email address in the batch of emails. If no match is found for the first email address, you must manually match the email batch to a record in Sage CRM. When you're filing batches of emails, ensure all emails have the same email address.

In Sage CRM you can open the **Communications** tab on a Company or Person record and then drag and drop an email from Outlook directly onto the Document Drop icon. This method stores the entire email as an attachment to the Communication record. Alternatively, complete the following steps:

1. To file an email that's in an Outlook folder, select the email you want to file and click **File email** on the Sage CRM ribbon.
2. To file a new email that you're sending from Outlook, click **Home | New | New Email** and fill in the details of the email. Then click the **Sage CRM** menu and click **Send and File**.
3. To select the Company or Person records to file the email against, click **Add** in the **File emails** panel and search for the required record. If you select multiple Person records, the email is filed as a Communication record against each target specified. If you do not link the email with a Company or Person, the Communication record becomes an orphan record in Sage CRM and is difficult to find. When you file an email against a Company or Person record, the email inherits the territory of the company or person (in that order), depending on your insert rights for those territories.
4. Specify filing options.
    - **Status** The current status of the email (Canceled, Complete, Pending, or In Progress).
    - **File By Date and Time** File the email by the date and time at which it was received or by the current date and time.
    - **Action** The action type under which to file the email. For example, Email In, Email Out, or Meeting.
5. Click **File email** to file the email in Sage CRM and return to Outlook. Alternatively, click **File and View** to view the Communication record in Sage CRM before you file it.

You can restrict certain types of files being uploaded into Sage CRM using Document Drop but these restrictions do not apply to email attachments.

Adding contacts using Lite Outlook Integration

Lite Outlook Integration lets you add Outlook contacts to Sage CRM. If Exchange Integration is enabled, you can synchronize the contacts whenever you update them in Sage CRM or Outlook. But if Exchange Integration is not enabled, any changes that you make to these contacts in Sage CRM are not reflected in Outlook.

1. In Outlook, click **People** on the bottom bar.
2. Highlight the contact that you want to add to Sage CRM and click **Add Contact** on the Sage CRM ribbon. Deduplication is carried out based on the match rules set by your system administrator in Sage CRM. For more information, see Preventing duplicate entries.
3. Review and complete the contact details in Sage CRM and click **Save**. The contact is added to Sage CRM.
4. To view your contacts, open Sage CRM in a browser and click **My CRM | Contacts**.

Documents

- Managing documents
- About mail merge
- Working with templates
- Attaching a document to a Sage CRM record
- Attaching an email to a Sage CRM record
- Working with shared documents

Managing documents

The **Documents** tab is available on a company, person, case, opportunity, solution, quote, order, and custom record. It provides an interface to all documents and templates that are stored in the Sage CRM library. From this tab, you can:

- Perform a mail merge using customer details from the current context and link a copy of the merged document to a Sage CRM person record. For more information, see Performing a mail merge.
- Link a copy of a document generated outside Sage CRM to a record. For more information, see Attaching a document to a Sage CRM record.
- View merged and uploaded documents. Click the **View Attachment** icon beside the document. Alternatively, click the record link and click **View Attachment**.
- Edit merged documents. This option is available in Internet Explorer when your system administrator has enabled the CRM plugin. Click the record link and click **Edit Attachment**. When you've made your changes, click **Save** in Sage CRM.

> **Note:** Documents in the **Documents** tab on a person record are also displayed in the **Documents** tab on a linked company record.

The **Communications** tab is available on a company, person, case, opportunity, lead, solution, quote, order, and custom record. From this tab. you can:

- Link a copy of an email to a Sage CRM record. For more information, see Attaching an email to a Sage CRM record.
- View merged documents and attached emails. Click the **View Attachment** icon beside the communication name in the **Communications** list.

About mail merge

Mail merge is a server-side process. It creates a document using an HTML or Microsoft Word template merged with Sage CRM record details.

Mail merge templates contain Sage CRM merge fields. The available fields depend on the context you're in. For example, to include merge fields from the opportunity table in a merged document, start the merge process in the context of an opportunity. Merge fields are placeholders for information from the Sage CRM database that's inserted during a merge. For example, the merge field <<comp_name>> is replaced by an actual company name when you perform a merge between the template and the database data.

Sample mail merge templates are stored on the Sage CRM server and are available to all users from the **Shared Templates** list.

You can create HTML templates using the text editor. For more information, see Creating a template using the text editor. You can also create Word templates and upload them to Sage CRM. For more information, see Creating a Word template and Uploading a Word template or image file.

If you are an info manager, you can create and upload templates that are available to all users. If you are not an info manager and want to share your template with other users, save it locally, email it to your system administrator, and ask the administrator to upload it to the global Shared Templates list.

A merged document can be output in Word or PDF format. If you merge to Word, you need Word (or another program that opens .docx files) on your client machine to view and print the document.

You can create a merged document for all contacts contained in a search list, saved search, or group and view it on the **Documents** tab. For more information, see Managing documents.

Performing a mail merge

1. On the top bar, click the **Search arrow** and click **<Entity>**. The available merge fields depend on the context you're in, so ensure you start the merge in the correct context. For example, to include merge fields from the opportunity table, start the merge process in the context of an opportunity.
2. Enter your search criteria and click **Find**.
3. Select the record to use in the mail merge.
    - To use a single record, click the record link and click the **Documents** tab. Then, click **Merge to Word** or **Merge to PDF**.
    - To use all records that are returned for your search criteria, click **Merge to Word** or **Merge to PDF**.

    Your system administrator must enable **Merge to Word**.
4. Click the template link. Mail merge templates are available only in the context with which they're associated. For example, only case templates are available in the case context. If you use a template outside its context, the merge fields won't convert successfully.

- If a mail merge template is not visible in the context of a particular entity, ensure the template is assigned to the correct entity and is not a private template.
- You can modify an HTML template to add custom text, insert Sage CRM merge fields, and apply custom formatting. For more information, see Creating a template using the text editor.
- If you have existing Word templates that you want to modify during the merge process, you must convert them to HTML first and then upload them to Sage CRM.
- You can create and upload new Word templates. For more information, see Creating a Word template. Ensure the template does not contain column, section, or line breaks.
- To preview the merged document, click **Preview Merge**. If you're merging multiple records, the preview shows only the first record in the group. Disable any active pop-up blockers to view the preview.

5. Click **Merge and Continue**.
   - To create a communication record with the merged document attached, select **Create Communication**.
   - To see the merged document, click **View merged document**.
   - To change the merged document, click **Edit merged document**. This option is available in Internet Explorer when your system administrator has enabled the CRM plugin. Make your changes to the document, save and close. Then click **Save**.
6. Click **Continue**.
7. If you selected **Create Communication**, complete the Details panel fields and click **Save**. If you created a merged document for all contacts in a search list, saved search, or group, a communication record is created for each contact. You can view the merged document as an attachment on the communication record.
8. To send the merged document to a customer, you must attach it to an email. For more information, see Sending an email.

Note: If you merge more than 1500 .docx records, the merged documents are saved in .doc format.

Working with templates

- Creating a template using the text editor
- Creating a Word template
- Creating a Word label template
- Uploading a Word template or image file
- Deleting a template

Creating a template using the text editor

Note: Sage CRM ships with shared templates including default templates for quick quotes and quick orders. Only info managers and system administrators can change shared templates or the default quick quote and order templates.

1. Ensure you're in the correct context for the new template so you can access the correct merge fields. For example, open a quote record to create a template that uses quote merge fields.
    a. On the top bar, click the **Search arrow** and click **<Entity>**.
    b. Enter your search criteria and click **Find**.
    c. Click the record link.
2. Click the **Documents** tab and click **Merge to Word** or **Merge to PDF**. Your system administrator must enable the **Merge to Word** option.
3. Click **Create Template**.
4. Enter details in **File** and **Description**.
5. Create the main body of your template and insert Sage CRM merge fields from **Insert Sage CRM Field**. For more information, see Considerations when creating the template body.
6. Click **Save Template**. The new template is saved in HTML format and listed in your **Shared Templates**.

Considerations when creating the template body

- You can paste content from Microsoft Word or HTML source code into the text editor. By default, the text editor may remove some content from the HTML source such as disallowed tags or styling information that is not recognized by the text editor. Your system administrator can disable this behavior if you are creating complex email messages.
- To insert an image, ensure it has been uploaded to the server. For more information, see Uploading a Word template or image file. Then, insert the image name in an HTML *img* tag in the template body. For example, *<img src="logo.jpg">*.
- Select Sage CRM merge fields from **Insert Sage CRM Field**. If you need a merge field that's not available, ensure you started the merge in the correct context. For example, to include merge fields from the opportunity table, start the merge process in the context of an opportunity. If you're in the correct context and don't have the required fields, ask your system administrator to customize the mail merge view for the main entity of the mail merge.
- When creating a mail merge using opportunity merge fields, you must include *TableStart* and *TableEnd* tags even if you don't use nested items. If you don't include these tags, the merge fails with no errors given.
- If the **Insert Nested Region** link is available, use it to surround merge fields in the template body or table with the `TableStart` and `TableEnd` tags. If you don't use these tags, the actual field values will not be inserted into the document. You must include the `TableStart` and `TableEnd` tags in

the same template section, table row or table cell. This applies even if you're not using line items.

For example, when creating a template for quotes:

```
«TableStart:Quotes»
«comp_name»
«pers_firstname»
«pers_lastname»
«TableEnd:Quotes»
```

If the **Insert Nested Region** link is not available, you don't need to surround merge fields with the `TableStart` and `TableEnd` tags.

- To display a row of quote item data, the first column in that row must include a *TableStart:QuoteItems* tag, and the final column must include a *TableEnd:QuoteItems* tag.
- Include the CID field beside each currency field to ensure the currency information is formatted correctly. For example, `«orIt_quotedprice_CID»«OrIt_quotedprice»`.
- Format the body content Text editor buttons.

Text editor buttons

Use the Sage CRM text editor to format the body of a mail merge template or email template. The following table explains buttons whose function might not be immediately obvious. Hover over a button to view the button name.

Button	Function
Source	View or edit the source code of the document.
Preview	See what the final template will look like.
Link	Add a link to an email address, anchor, or web site.
Unlink	Remove a link to an email address, anchor, or web site.
Anchor	Insert a marker in your text. You can link to this marker.
Maximize	Make the text editor window the full size of your screen. **Note:** You can't maximize the text editor when working on iPad.
Block Quote	Format the text as a block quote. The text is indented and italicized.
Create Div Container	Add a div container to apply formatting to a large fragment of text. This is an advanced feature that you should use only if you've sufficient knowledge of Web standards.

Creating a Word template

You can create a Word template and use it to perform a mail merge.

1. Open a new Word document.
2. Enter the content that you want to appear in the template. To ensure all text and pictures remain formatted correctly during a mail merge, use a table to format your document.
3. To add a picture to the template, click **Insert | Pictures**. Browse to the relevant file and click **Insert**.
4. To insert a merge field to the template:
    a. Click **Insert | Quick Parts | Field**.
    b. Select **MergeField** from **Field names**.
    c. Enter the Sage CRM merge field name in **Field name**. To ensure the template works properly, a merge field must correspond to the **exact field name** in Sage CRM. This is not the name that's listed in the **Insert Sage CRM Field** drop down on the mail merge screens. You must get the exact field name from your system administrator. Enter merge fields from one entity only. For example, when creating a template to use with case records, you can enter case, person, company, address and user merge fields but not quote merge fields.
    d. Click **OK**.
    e. Add a paragraph break after a mail merge field.
    f. Include the CID field beside each currency field to ensure the currency information is formatted correctly. For example, `«orIt_quotedprice_CID»«OrIt_quotedprice»`.
    g. To add the current date field, include *«CurrentDate»*.
5. Ensure TableStart and TableEnd tags are used correctly.
    - Use *TableStart* and *TableEnd* tags for nested items in quote or order templates. To include a table with nested (child) item merge fields, insert start and end tags for the main table and the child table. For example, quotes and quote Items. You must also include a *TableStart* and *TableEnd* tag in the same template section, table row or table cell. For example, if you want to display a row of order item data, the first column in that row must include a *TableStart:OrderItems* tag, and the final column must include a *TableEnd:OrderItems* tag.
    - When creating a template using opportunity merge fields you must include *TableStart* and *TableEnd* tags even if you don't use nested items. If you don't include these tags, a merge using the template fails with no errors given.
6. Ensure the template does not contain column, section, or line breaks.
7. Click **File | Save As** and save the template as .docx, .docm (if it contains a macro), .htm, or .html. You can upload the template and use it to perform a mail merge. For more information, see Uploading a Word template or image file. To share the template with other users, email it to your system administrator and ask the administrator to upload it to the global Shared Templates list.

Creating a Word label template

To create a Word label template, you must insert Sage CRM merge fields and wrap the template in *TableStart:Labels* and *TableEnd:Labels* tags. The template must contain at least two label placeholders and the second placeholder must contain a **Next** field.

1. Create a blank Word document and insert a one row table with enough columns for your labels. Size the cells and align the margins to your label.
2. Click **Insert | Quick Parts | Field**.
3. In the first column:
    a. Select **MergeField** from **Field names** and enter *TableStart:Labels* in **Field name**.
    b. Select **MergeField** from **Field names** and enter the name of the Sage CRM merge field in **Field name**.
4. In each subsequent cell:
    a. Select **Next** from **Field names**. To display this field, select **Show field codes instead of their values** in Word Advanced Options. Alternatively, press **ALT+F9**.
    b. Copy the Sage CRM merge fields from the first column.
    c. Select **MergeField** from **Field names** and enter *TableEnd:Labels* in **Field name**.

«TableStart:Labels» *«pers_salutation» «pers_firstname» «pers_lastname»* *«comp_name»* *«comp_emailaddress»*	*{NEXT}* *«pers_salutation» «pers_firstname» «pers_lastname»* *«comp_name»* *«comp_emailaddress»* «TableEnd:Labels»

5. Click **File | Save As** and save the template as .docx. You can upload the template and use it in a mail merge. For more information, see Uploading a Word template or image file. To share the template with other users, email it to your system administrator and ask the administrator to upload it to the global Shared Templates list.
6. To preview the merge document, open a customer record and click **Documents | Merge to Word** or **Merge to PDF**, and click the template link. Your system administrator must enable **Merge to Word**.

Uploading a Word template or image file

You can upload a local Word document template and use it to perform a mail merge. You can upload an image file and use it in a mail merge template. For more information, see Creating a template using the text editor.

1. Ensure you are in the correct context. When you upload a template, you must associate it with the entity for which you've entered merge fields.
    a. On the top bar, click the **Search arrow** and click **<Entity>**.
    b. Click **Find**.
2. Click **Merge to PDF**.
3. To upload a template or image through Windows Explorer, click **Add Local Template / Image**, navigate to the file and click **Open**.

- In Internet Explorer, click **Add Local Template / Image** and then click **Browse**. Navigate to the file and click **Open**.
- When using Safari or Internet Explorer, you can add a single file. In other browsers, you can add multiple files at once.

4. To upload a template or image using drag and drop, drag single or multiple files from the current location to the **Drop files here** area.
   - In Internet Explorer, drag files to the **Document Drop** icon. Download the CRM plugin if you're prompted to do so. For more information, see Downloading the CRM Plugin.
   - In Safari, drag files to the **Add File** button.

   The file is listed in **File(s)**. A green check mark indicates that it was uploaded successfully. A red cross indicates that it wasn't uploaded. To upload successfully, a file must comply with the system file size, type, and number of files settings. These settings are defined by your system administrator.
5. Enter details for the template or image. For more information, see Template and Image Details.
6. Click **Save**.

Template and Image Details

The table below describes the fields that you must complete when you upload a Word template or image to use with mail merge or emails.

Field	Description
Type	The type of document. • Use **Email Inline Image** for an image. • Use **Quote** for a quote template. • Use **Order** for an order template.
Category	The area of business relevant to the document.
Owner	The owner or author of the document. This must be a Sage CRM user.
Team	Users belonging to this team can access the document. **None**: The document is available to all users.
Status	The current status of the document.
Language	The language in which the document is written.
Active	**Yes**: The template is currently used. **No**: The template is not currently used.

Field	Description
Entity	The context in which the document is available. For example, if set to **Opportunity**, the document is available when a user belonging to the team specified in **Team** performs a mail merge in the context of an opportunity. **None**: The document is unavailable.
Description	A short description of the document. Complete this field to help users select the most relevant document, template, or image.

Deleting a template

Note: Only a system administrator can delete a shared template.

1. On the top bar, click the **Search arrow** and click **<Entity>**.
2. Click **Find**.
3. Click **Merge to PDF**.
4. Click the template link.
5. Click **Delete** and **OK**.

Attaching a document to a Sage CRM record

You can attach a document created in another application to a Sage CRM record and make it available for other users to view.

Note: The system administrator can restrict the type of files you can upload. For example, prohibiting EXE or BAT files.

1. Open the relevant record.
    a. On the top bar, click the **Search arrow** and click **<Entity>**.
    b. Enter your search criteria and click **Find**.
    c. Click the record.
2. Click the **Documents** tab.
3. To upload a document through Windows Explorer, click **Add File**, navigate to the file and click **Open**.
    - In Internet Explorer, click **Add File** and then click **Browse**.
    - When using Safari or Internet Explorer, you can add a single file. In other browsers, you can add multiple files at once.

4. To upload a document using drag and drop, drag single or multiple files from the current location to the **Drop files here** area.
    - In Internet Explorer, drag files to the **Document Drop** icon. Download the CRM plugin if you're prompted to do so. For more information, see Downloading the CRM Plugin.
    - In Safari, drag files to the **Add File** button.

    The file is listed in **File(s)**. A green check mark indicates that it was uploaded successfully. A red cross indicates that it wasn't uploaded. To upload successfully, a file must comply with the system file size, type, and number of files settings. These settings are defined by your system administrator.
5. Enter the Document Details and click **Save**.
6. Click **Save**.
7. To view the document, click the record on the **Documents** tab and click **View Attachment**. For more information, see Managing documents.

Document Details

The table below describes the fields that you must complete when you attach a document to a Sage CRM record.

Field	Description
Type	The type of document. • Use **Email Inline Image** for an image. • Use **Quote** for a quote template. • Use **Order** for an order template.
Category	The area of business relevant to the document.
Status	The current status of the document.
Owner	The owner or author of the document. This must be a Sage CRM user.
Team	Users belonging to this team can access the document. **None**: The document is available to all users.
Description	A short description of the document. Complete this field to help users select the most relevant document, template, or image.
Action	The type of communication record that's created.
Territory	Users belonging to this territory can access the document. **Default**: The document is available to all users in the default territory of the current user. For more information, see Territory management.

Field	Description
Create Communication and save merged document	A communication record is created and the document is attached to it.
Create Communication (IE only)	A communication record is created and the document is linked to it.

Downloading the CRM Plugin

The CRM Plugin gives you access to the **Document Drop** icon, and the **Edit Attachment** button on the Document Details panel and during a mail merge. When you first encounter a feature that requires the plugin, you're prompted to download the plugin. Follow the onscreen instructions. You only need to do this once. If you receive an upgrade or change machines, you're prompted to download the plugin again.

These features are available only when working with Sage CRM in Internet Explorer. Your system administrator configures access to the plugin.

Attaching an email to a Sage CRM record

1. Open the relevant record.
    a. On the top bar, click the **Search arrow** and click **<Entity>**.
    b. Enter your search criteria and click **Find**.
    c. Click the record.
2. Click the **Communications** tab.
3. There are several ways to add an email:
    - Drag an email from the current location to the **Document Drop** icon. This option is available in Internet Explorer when your system administrator has enabled the CRM plugin. For more information, see Downloading the CRM Plugin.
    - If Classic Outlook Integration is configured, select the email in Outlook and click **File Email**. For more information, see Filing emails using Classic Outlook Integration.
    - If Lite Outlook Integration is configured, select the email in Outlook and click **File Email**. For more information, see Filing emails using Lite Outlook Integration.
    - If Email Management is configured, inbound emails are automatically filed against the matching person or company record. For more information, see Filing inbound and outbound emails.
4. A new communication record is created when you add the email. Complete the Task fields and click **Save**.

5. Click **Save**. The new communication is displayed in the **Communications** list.
6. To view the email, click the **View Attachment** icon and click **Open**.

Working with shared documents

The **Shared Documents** tab stores corporate documents. You must have access rights to view a shared document.

- Adding shared documents
- Viewing and editing shared documents

Adding shared documents

> **Note:** Only info managers with Document Library Rights can add shared documents.

1. Click **My CRM | Shared Documents**.
2. To upload a document through Windows Explorer, click **Add File**, navigate to the file and click **Open**.
   - In Internet Explorer, click **Add File** and then click **Browse**.
   - When using Safari or Internet Explorer, you can add a single file. In other browsers, you can add multiple files at once.
3. To upload a document using drag and drop, drag single or multiple files from the current location to the **Drop files here** area.
   - In Internet Explorer, drag files to the **Document Drop** icon. Download the CRM plugin if you're prompted to do so. For more information, see Downloading the CRM Plugin.
   - In Safari, drag files to the **Add File** button.

   The file is listed in **File(s)**. A green check mark indicates that it was uploaded successfully. A red cross indicates that it wasn't uploaded. To upload successfully, a file must comply with the system file size, type, and number of files settings. These settings are defined by your system administrator.
4. Enter details for the shared document. For more information, see Document Details.
5. Click **Save**. Uploaded documents are listed in the **Shared Documents** tab for all users whose primary or display team is the team associated with the document.

Viewing and editing shared documents

> **Note:** Only system administrators and info managers can edit shared documents.

1. Click **My CRM | Shared Documents**.
2. Enter search criteria in the filter box to find the document you want to edit.
3. Click the document link.
4. Click **View Attachment** to download the attached document.
5. Open the document, make your changes, and save the document locally to your computer. Note the document file name.
6. In Sage CRM click **Delete** and **Confirm Delete** to delete the existing document.
7. Click **Add File** to upload the updated document.
8. Click **Save**.

Sales

- Leads
- Opportunities
- Sales forecasting

Leads

- What is a lead?
- Creating a new lead
- Matching a lead to an existing company
- Qualifying a lead
- Converting a lead to an opportunity
- Manually progressing leads
- Viewing the leads pipeline
- Viewing leads assigned to you
- Creating a lead from My CRM
- Deleting a lead

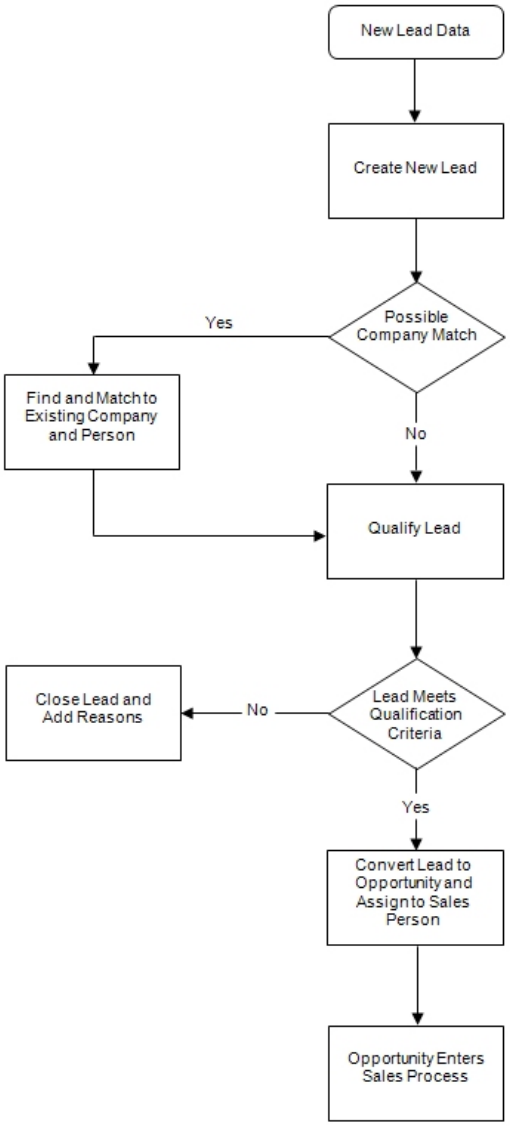
What is a lead?

A lead represents unqualified information that you have received from, for example, your corporate Web site, trade shows, and purchased mailing lists.

A lead exists outside of the context of a person or company. This is to prevent the system from becoming overloaded with thousands of unclean, unqualified companies and people.

Company and Person records are created only once the lead has been fully qualified and is ready to be converted to an opportunity. If the company and person already exist in your system, you can match them to the lead details.

To import leads (for example, from purchased lists of data), you must have System Administrator rights to carry out a data upload. Please ask your system administrator for more information.



Creating a new lead

1. Click **New | New Lead**. The Lead Duplicate find screen is displayed. \
2. Enter the first few letters of the lead company name, and the lead person name.
3. Click **Enter Lead Details**. Sage CRM searches for possible duplicate lead records. For more information on deduplication, see Preventing duplicate entries.
4. If a potential duplicate lead record is found, a warning is displayed.
    - To create the lead record regardless of the warning, click **Ignore Warning and Enter Lead**.

- To return to the Lead Duplicate find screen to change the new lead details, click **Back to Lead Entry**.

5. If no duplicate lead record is found, the New Lead page is displayed.
6. Complete the lead fields and click **Save**. For more information, see Lead fields.
7. When a lead is created, you can:
    - Add notes to leads from the **Notes** tab.
    - Add and view communications linked to the lead from the **Communications** tab.
    - Track changes made to the Lead record from the **Tracking** tab.

Note: You can use Sage CRM to record if a person or lead has given you their consent to collect and use their personal data. You may need to do so to comply with the data privacy regulations in your country. For more information, see Recording consent that you may send marketing materials.

Lead fields

This table explains the standard fields on the New Lead page.

Field	Description
Description	Short description.
Source	How the lead was initiated. For example, Phone Enquiry, Conference.
Opened	Date the lead was opened.
Main Product Interest	Select from a list of main product lines.
Details	Detailed description of the requirements.
Campaign/Wave Activity	Campaign Wave Activity the lead is linked to. Select from a list of existing Wave Activities.
Decision Timeframe	Timeframe within which a decision will be made.
Opt out of E-marketing Communications	This flag is automatically set if the email address associated with the lead has opted out of all E-marketing communications received via Sage CRM's integrated E-marketing (Swiftpage). You can manually select or clear the option. However, this has no impact on E-marketing emails sent from Swiftpage (these always retain the opt-out flag set from the E-marketing email).
Assigned To	User responsible for the lead.
Team	Team the lead is assigned to. For example, telesales.

Field	Description
Stage	Stage of the lead. For example, New Lead, Qualified, No Interest.
Status	Status of the lead. For example, In Progress, Opportunity, Closed.
Priority	Priority of the lead. For example, Normal, High, Low.
Company Name	Name of the company.
Web Site	The company URL.
Industry	Industry segment the lead belongs to. For example, Telecommunications, Finance.
Annual Revenues	Approximate revenue of the company.
No. Of Employees	Approximate number of employees.
Last name	Lead contact surname.
First name	Lead contact first name.
Salutation	Lead contact salutation. For example, Mr, Mrs, Dr.
Title	Lead contact title. For example, Purchasing Manager.
Email	Lead contact email address.
Phone Country Code	Phone country code of person.
Phone Area Code	Phone area code of person.
Phone Number	Phone number of person.
Fax Country Code	Fax country code of person.
Fax Area Code	Fax area code of person.
Fax Number	Fax number of person.
Address 1	First line of address.
Address 2	Second line of address.
Address 3	Third line of address.
Address 4	Fourth line of address.
City	Address city.
Zip Code	Address zip or postal code.
State	Address state or county.
Country	Address country.

The table below shows the Lead Status icons.

Status Icon	Description
	In Progress
	Opportunity
	Closed

Matching a lead to an existing company

Once you create a lead, a **Possible Company Match** message is displayed if the company details you entered seem to already exist in Sage CRM.

If your lead has a company match, you can link the raw lead details to the Company record. This provides you with a valuable source of information on the company you're dealing with, which may assist in the lead qualification process.

1. Click **Add Or Find This Company**.
2. Click the company match. The **Company Summary** page is displayed in a new browser window.
3. If you think you're dealing with this company, click **Select Company**.

You can match people too. Just click **Add Or Find This Person**.

If the company exists but not the person, you can add a new person now or when are ready to convert the lead to an opportunity. Remember that the unqualified lead data is separate from your core "clean" data. If the person does not yet exist in your People records and the lead turns into a dead end, you have added a low value contact into your core company database.

If there is a company and person match, priority is given to the company. This means, when you match a lead with a company, the person drop-down is automatically limited to existing people in that company.

If the lead turns into a potential sale (Opportunity), you must incorporate the Lead Company and Person into the main Company and People records. For more information, see Converting a lead to an opportunity.

Qualifying a lead

You've received enough information to fully qualify a lead.

If a Lead Workflow is enabled, a number of actions are available on the Lead Summary page. The Lead workflow can be set up and customized to suit your lead qualification process.

To qualify a lead using the standard Lead workflow:

1. Click **Rate Lead**.
2. Complete the required fields and add additional information in the tracking note.
3. Click **Save**. Your changes are recorded in the lead **Tracking** tab.

The **Duration** column on the **Lead Tracking** tab tracks how long the lead has spent at each stage of the qualification process. The duration takes into account the business calendar defined by the system administrator.

Converting a lead to an opportunity

Once a lead has been qualified and identified as a genuine sales opportunity, you can convert the lead to an opportunity.

Before converting, the lead first needs to be matched to an existing company and person. This ensures that when the opportunity is created, it is assigned to a true company and person (rather than existing as a disassociated entity, as a lead normally does).

You can match the lead to existing Person and Company records. If the data is not yet in the system, add a new company and person, or just add a new person if the company already exists, but the person is new.

1. Find and open the lead you want to convert to an opportunity.
2. On the Lead Summary page, click **Convert To Opportunity**.
   If you have not yet matched the lead to a company or person, a warning dialog box is displayed.
3. Click **Add Or Find This Company** on the Lead Summary page to match the lead to a company.
   - The system automatically searches for an existing company in the database that matches the company name on the lead.
   - If the system finds a name that begins with the company name you have already entered, it first gives you the option of selecting the existing company.
   - If you already matched the company at an earlier stage, and just need to match up the person, you can skip the next steps and click **Add Or Find This Person**.
   - If no matching company is found, or if you choose to ignore suggested matches, the New Company page is displayed in a new browser window. This page takes over details, such as Company Name and Person Name, already entered against the lead so that you do not have to retype them. Complete any further known details on the New Company page.
4. Click **Save**.
5. Click **Select Company**. The lead is matched to the new company and person that you have added to the system.
6. Click **Convert To Opportunity**. For more information on the Opportunity fields, see Creating a new opportunity.
7. Complete any further known details on the Record New Opportunity page.
8. Click **Save**. The Opportunity Summary page is displayed.

A converted opportunity has the following features:

- A **View Lead** button on the Summary page. This allows you to switch between the details of the opportunity and the lead. You can view communications associated with the lead, but you can no longer add communications to the lead once conversion has taken place.
- An **Opportunity Tracking** tab. This shows a record of the conversion from Lead to Opportunity.
- Communications which were created in the context of the lead are displayed in the **Communications** tab of the Opportunity.

Manually progressing leads

The lead workflow functionality automates the progression of leads to follow predefined business processes. If your system administrator turns the lead workflow off, the workflow actions on the lead summary screen are replaced with a **Progress** button. This button allows you to manually change details of the lead on the Progress Lead screen. Your changes are recorded on the **Tracking** tab.

Viewing the leads pipeline

- To view a graphical representation of In Progress leads assigned to you, click the **My CRM | Leads** tab.
  - The pipeline shows the number of leads at each stage.
  - Lead statistics are displayed beside the pipeline. For more information, see Lead statistics panel.
  - Leads are summarized in a list below the pipeline.
- To filter your leads by stage, click a pipeline segment. Alternatively, select a stage from **Stage** and click **Filter**.
- To toggle back to the full list of leads, click the highlighted segment on the pipeline.
- To view more details about a particular lead, click the lead link in the lead summary list.
- To hide the pipeline, click **<My Profile> | Preferences** and set **Show Leads Pipeline** to **No**.

Lead statistics panel

The information in the Statistics panel is summarized in the table below.

Field	Description
Average Time Open (days)	The average lifetime of each lead. If the lead has been converted, this is the length of time between the lead being opened and its corresponding opportunity being created. If the lead hasn't been converted, this is the length of time between the current date (according to the user's timezone) and the date the lead was opened. If no filter is applied to the funnel (i.e. no section is exploded), the figure displayed is the total of all lifetimes of all leads in every stage (excluding unassigned and deleted leads), divided by the total number of leads (excluding unassigned and deleted leads). If a filter is applied to the funnel (i.e. a section is exploded), the figure displayed is the total of all lifetimes of all leads in the stage divided by the total number of leads in the stage. The result is rounded to the nearest integer.
Opened Today	The total number of leads that were opened between 00:00 on the current day (in the user's timezone converted into the server's timezone) and the current time.
Opened This Week	The total number of leads that were opened between 00:00 (in the user's timezone converted into the server's timezone) on the first day of the week (according to the user's My Week Starts On preference) and the current time.
Opened This Month	The total number of leads that were opened between 00:00 (in the user's timezone converted into the server's timezone) on the first day of the month and the current time.

Viewing leads assigned to you

Click **My CRM | Leads**.

The list of leads currently assigned to you is displayed. You can use the filter box to filter the results.

Creating a lead from My CRM

As well as using the **New** button to create a new lead, you can also create new leads from the **Leads** tab.

1. Click the **Leads** tab and click **New Lead**. The new lead is assigned to you by default, but you can assign it to another user.
2. Fill in the lead details and click **Save**.

Deleting a lead

You can delete leads from Sage CRM if your security profile allows it. Contact your system administrator if you want to delete leads but the option is not available to you.

1. Find and open the lead you want to delete.
2. On the Lead Summary page, click **Edit**.
3. Click **Delete**, then **Confirm Delete**. The record is deleted from the system.

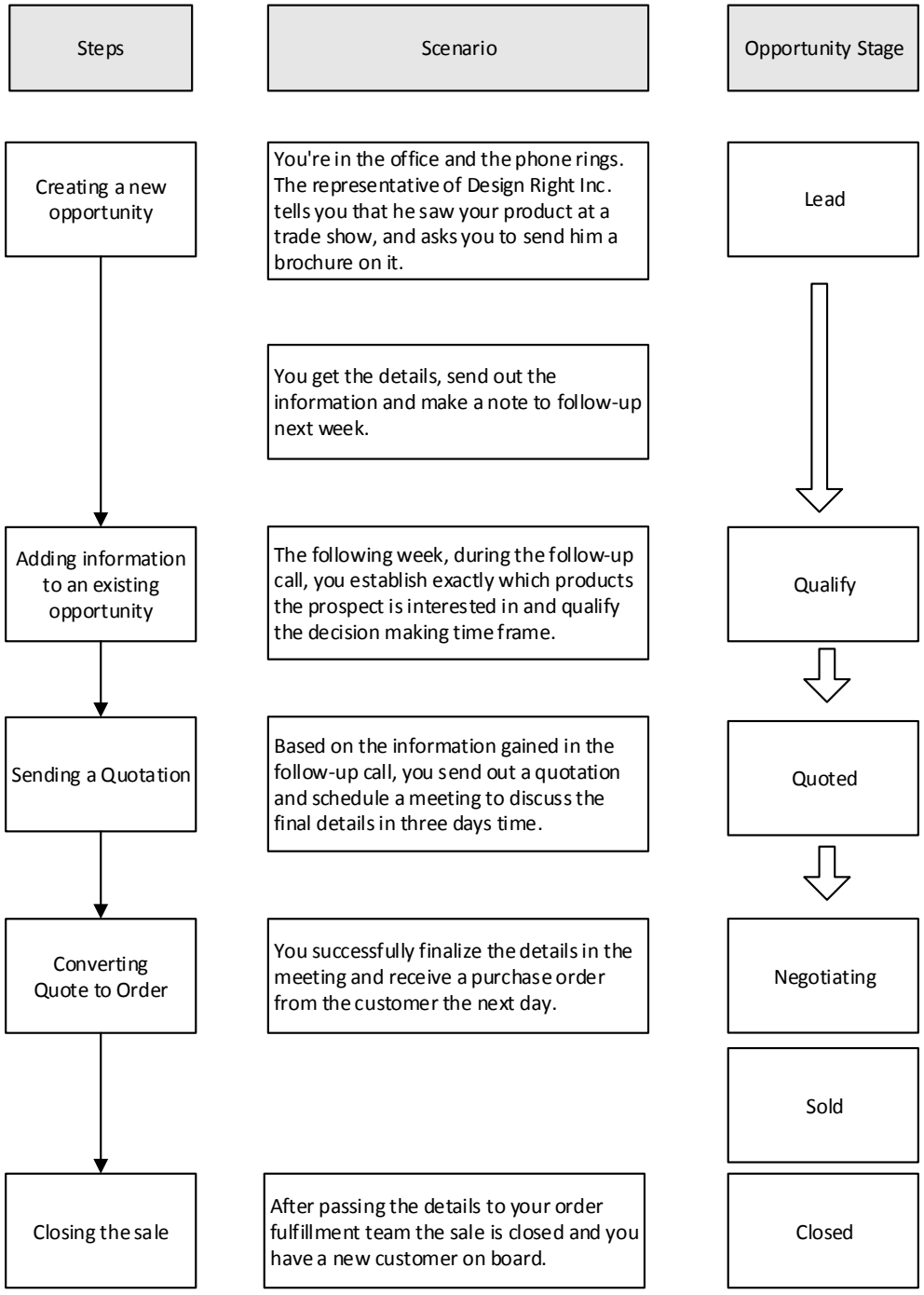
Opportunities

- What's an opportunity?
- Creating a new opportunity
- Adding products to an opportunity
- Progressing an opportunity
- Generating a quick quote or order
- Sending a quick quote or order
- Generating a quote
- Turning a quote into an order
- Generating an order
- Closing a sale
- Losing a deal
- Manually progressing opportunities
- Viewing the opportunities pipeline
- Running an opportunity report
- Viewing current opportunities
- Creating an opportunity from other contexts
- Deleting an opportunity
- Creating quotes and orders outside the opportunity context

What's an opportunity?

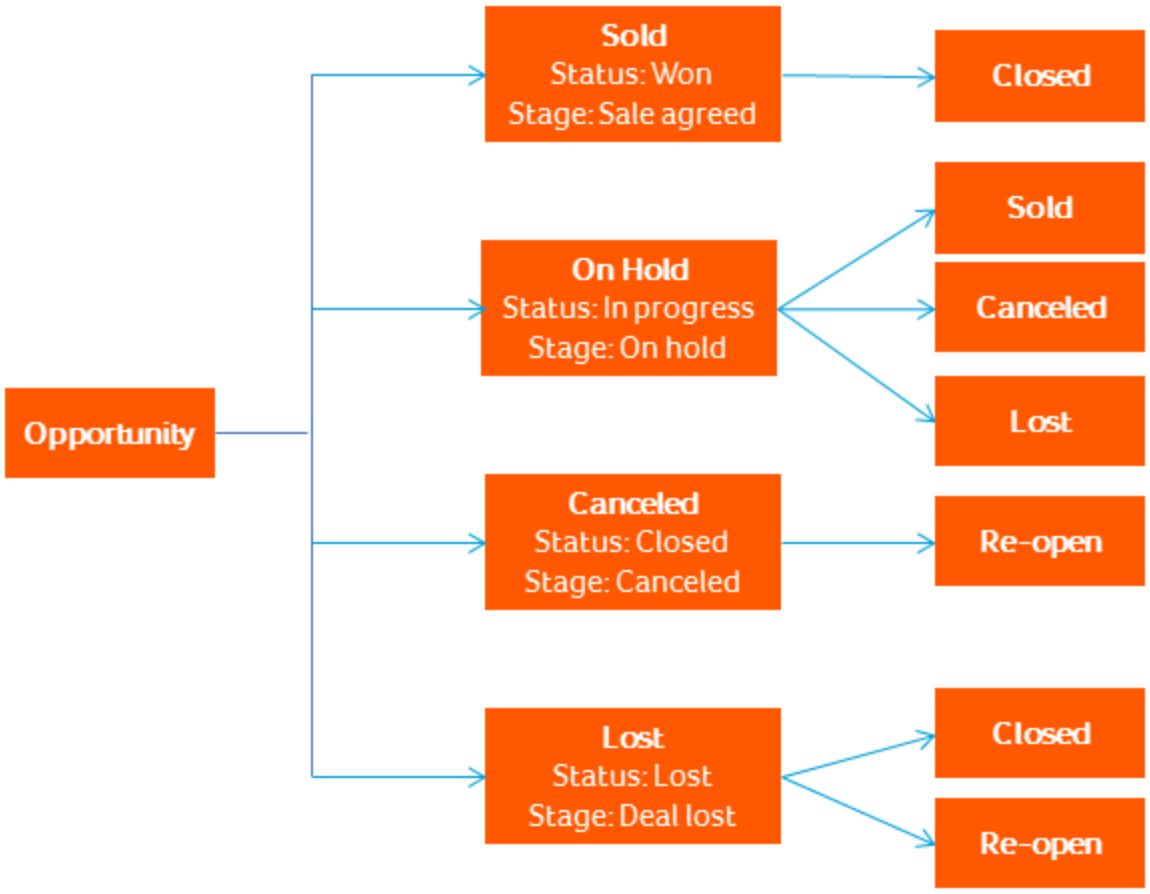
In Sage CRM, an opportunity means a sales opportunity. It can be created directly by a sales representative or from the conversion of a marketing lead into an opportunity.

Below is an example opportunity workflow.



Quick Sale Workflow

The Quick Sale Workflow is a predefined workflow designed for products that don't require a complex sales cycle and can be sold in a few steps. If your system administrator has enabled this workflow, you can create a **Quick Sale** on the Opportunity page and progress it using the predefined **Sold**, **On Hold**, **Canceled**, and **Lost** action buttons.



Creating a new opportunity

Your system administrator can set up workflows to help you create new opportunities. There are two predefined opportunity workflows. The **Quick Sale Workflow** has fewer stages than the standard **Opportunity Workflow** and is designed for organizations with fewer sales people, who need less steps to complete a sale.

1. Find the prospect. If they are new to your database, you first need to create a new company.
2. Click a company name, and click the **Opportunities** tab.
3. Click **New Opportunity**.
4. Depending on how your system administrator has configured workflow, there are several ways to create a new opportunity.
    - To use the standard opportunity workflow, click **New Opportunity**.
    - To use a shortened opportunity workflow, click **New Quick Sale**.

- To create a new opportunity based on an opportunity that you've already won, click **Cross-sell Opportunity**. The Cross-sell workflow rule is available at the **negotiating** and **sold** stages on predefined opportunity workflows.

5. Complete the opportunity fields. For more information, see Opportunity fields.
6. Click **Save**.The Opportunity Summary page is displayed.

At this stage, you can click **New | Task** to schedule a follow-up call. The task is automatically linked to the opportunity in the **About** field.

Opportunity fields

Field	Description
Company	Company that the sales opportunity is with.
Person	Main contact person in the company for the sales opportunity.
Description	Short description of the opportunity.
Source	Source of the opportunity. For example, Trade Show, Customer Referral, Web.
Type	Type of opportunity or general area of product interest. For example, Services, License, Consulting, Mix.
Customer Ref	Customer reference code. For example, it could be a combination of a marketing campaign code and customer identifier.
Details	Detailed description of the sales opportunity.
Opened	Date the opportunity was received. Defaults to today's date.
Closed	Actual date the opportunity was closed.
Territory	Security territory. For more information, see Territory management.
Competitors	Other people or companies bidding on the opportunity.
Winner	The person or company who won the sale.
Reason For Loss	Notes added by sales reps that provide insight into why a deal was lost. You can use this information to improve the sales process and win more deals in the future.
Cross-sell Opportunity	This checkbox is selected automatically to indicate that this is a cross-sell opportunity.
Original Opportunity	This SSA field is prepopulated with the name of the original opportunity when you create a cross-sell opportunity.

Field	Description
Wave Activity	The Campaign Wave Activity source of the opportunity (only available where Campaign Management is implemented).
Stage	Stage the opportunity is at. For example, Lead, Quoted, Negotiating.
Status	Status the opportunity is at. For example, In Progress, Won, Lost.
Certainty%	A percentage certainty that this deal will close at some point in the future.
Forecast	The figure the Sales User expects to get, if the deal closes.
Priority	Priority. For example, Normal, Low, High.
Assigned To	Person responsible for the sale.
Team	Team responsible for the sale.
Close By	Forecast close date.
Opportunity Currency	Read-only field, which comes from the Quote or Order. Please refer to the explanation of the Currency field on the Quotes tab for more information.
Total Quote Value	Read-only field. Gross Amount from the quotes associated with this opportunity where the **Include In Quotes Total** checkbox is selected. This value is not used for forecasting purposes. If the quote is set to a status of Inactive, the Gross Amount from the quote is deducted from the Total Quote Value. When a quote is converted to an order, the Gross Amount of the quote is deducted from the Total Quote Value. If only one quote has the Include In Quotes Total check box selected, this value is set to zero when the quote is converted.
Total Order Value	Read-only field. Gross Amount from the orders associated with this opportunity where the **Include In Quotes Total** checkbox was selected on the quote. This value is populated when a quote is converted to an order. It is not used for forecasting purposes. If the order is set to a Status of Inactive, the Gross Amount from the order is deducted from the Total Order Value on the opportunity.

This table shows the Opportunity Status icons.

Status Icon	Description
	In Progress
	Won

Status Icon	Description
	Lost
	Closed

Adding products to an opportunity

1. Within the context of an opportunity, click the **Quotes** tab.
2. Click **New**.
3. Complete the fields on the New Quote page and click **Save**.
   For more information, see New Quotes page fields.
4. Click **Next**, and then click **New line item**.
5. Complete the fields on the New Line Item panel.
   For more information, see New line items panel fields.
6. Click **Save & New** to add the next line item, or **Save** to add the line item and quit the New Line Item panel.

You can add a discount on a quote or order, which has no line items. You can do this to raise a credit note, or to give a special customer discount. For example, to give a customer $10 off every order, you can add $10 as a discount before the customer has decided on the products.

When editing a line item, you cannot change the product or product family.

When you've finished adding line items, you can do the following.

- To update the Quote Summary panel and the Line Items discount area, click **Change Summary**.
- To add more line items to the quote, click **New Line Item**.
- To add a free text line item, click **New Free Text Item**. For example, you can add a line for a product which isn't displayed in your standard price list. You can also add a description, quantity, and price for the line item. These line items are included on the printed quote.
- To add a free text comment, click **New Comment Line Item**. For example, extra information about another line item in your quote. You can add a line number and a description. For example, if you add a Line Number 2, the comment is positioned as the second line item. If you've already selected other line items, their line item numbers are moved accordingly. Comment line items are included on the printed quote.
- To create a new quote based on the existing quote information, click **Clone**.
- To change the quote into an order, click **Convert**.
- To mail merge the quote with a quote template document, click **Merge to Word** or **Merge to PDF**.
- If your system administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

- To add the quote to an existing group of quotes, click **Add to group**. For example, you could create a group as part of a mailing action. For more information, see Groups.

New Quotes page fields

Field	Description
Currency	Currency of the quote. Your default currency is displayed. It can be changed there are no line items. The currency set here is displayed on the **Opportunity Summary** page. You can create multiple quotes with no line items, and set a different currency each time you create a quote. However, as you set the currency for the new quote, the currency on all the other empty quotes are changed to the same currency.
Pricing List	Select the pricing list for the quote. This is a mandatory field, and the Default Pricing List is set by default.
Status	A quote can have a status of Active, Inactive, or Converted. You can select from Active or Inactive. The status of Converted is automatically set once the quote is converted into an order. Setting the status to Inactive deducts the gross amount of the quote from the Total Quote Value on the opportunity (if the **Include In Quotes Total** check box was selected).
Include In Quotes Total	Toggle the inclusion of the quote in the **Total Quote Value** field on the opportunity. You can include one or more quotes in the Total Quote Value on the opportunity. The Total Quote Value is not used for forecasting purposes.
Reference	Generated automatically when the quote is saved. The format of the reference is set by the system administrator.
Opened	Read-only field set by the system when the quote is created.
Expiration Date	Defaults to seven days from the date the quote is created. You can manually change this date. The system administrator can change the default length of validity.
Description	Short description of the quote.
Discount Type	Percentage or Amount.
Discount Percentage	Percentage discount on the whole quote. Discounts are rounded to the system setting for decimal places. If the Discount Type is set to Amount, this field is read-only and is calculated according to the amount entered in the Discount Amount field.
Discount Amount	Money amount discount on the whole quote. Can be typed in to two decimal places. If the Discount Type has been set to Percentage, then this field is read-only and is calculated according to the percentage entered in the Discount Percentage field.

New line items panel fields

Field	Description
Product Family	Group that the product belongs to. For example, a company selling office products may have the product families: Office Furniture, Computers Peripherals, Stationary, and Filing. The Product Family selected narrows down the products list in the Product field. Product Families are set up by the system administrator.
Product	Select from a list of products set up by your system administrator.
UOM	Unit of Measure available for the selected product. For example, a company selling office products may sell pens as singles and in packs of 24 or 36. The system administrator can set up a UOM family for "Pen Packs", and then UOMs as Single, 24-pack, and 36-pack. If the system administrator has not enabled Units of Measure, then this field is not displayed.
Quantity	Quantity of the product. If UOMs are being used, then this is the quantity of the UOM.
List Price	Standard price of the product. If UOMs are being used, then this is the standard price the UOM. This is a read-only field.
Quoted Price	Defaults to the List Price for a quantity of one—of a product or of a UOM. This field can be edited to discount line items.
Line Item Discount	Read-only field. Calculated by subtracting the Quoted Price from the List Price, and multiplying by the Quantity.

Progressing an opportunity

If your system has an opportunity workflow enabled, a number of action buttons appear on the right-hand side the Opportunity Summary page. The workflow actions available to you depend on how the opportunity workflow has been set up and customized to suit your sales process.

You can record the qualification information received from your prospect against the opportunity by using a sample opportunity workflow available in Sage CRM.

Note: The predefined Quick Sale Workflow doesn't include a qualification step because it represents a shorter sales process and has fewer workflow options. For more information, see Quick Sale Workflow.

1. Click **Qualify**.
2. When the **Progress Opportunity** page is displayed, complete the required fields and add additional information in **Tracking Note**.
3. Click **Save**. The Opportunity Summary page is displayed. You can view all changes made to the Opportunity on the Progress Opportunity page can from the **Opportunity Tracking** tab. The Duration column on the Opportunity Tracking tab shows how long the opportunity has spent at each stage of the qualification process. The Duration takes into account the business calendar defined by the system administrator.

Generating a quick quote or order

You can quickly generate a quote or order using a default template merged with existing record details, and then print it or email it to a contact directly from Sage CRM. You can ask your system administrator to change the default template if it doesn't suit your needs. You can also generate a quote or order using a choice of templates rather than the default quick template; the steps are described in Generating a quote and Generating an order.

1. Click **New | New Quote** or **New | New Order**.
2. Alternatively, find and open the opportunity record or the company record for which you want to create a quick quote or order. If workflow is enabled, you might have to progress the opportunity before you can create, print, or send a new quote or order based on the record.
3. Complete the fields on the New Quote screen (see New Quotes page fields for details) or the New Order screen (see Turning a quote into an order for details). You can link the quote or order to a company or person using the advanced search buttons.
4. Click **Next**.
5. To preview the quote or order in a new window, click **Print Quote** or **Print Order**. Use the PDF buttons to print or save the quote or order.
6. To save the quote or order without printing or emailing it, click **Continue**.

Sending a quick quote or order

When you've generated a quick quote or order, you can send it as an email attachment to a contact directly from Sage CRM.

1. Click **Send Quote** or **Send Order**.
2. Complete the email address and subject fields.
3. To create a completed communication record with a link to the new quote or order, complete the Communications Options fields, making sure you specify a team and a follow up action. A communication record is associated with each person in the specified team.

4. To add information about the emailed quote or order to an existing marketing campaign, select the relevant campaign activity from **Wave Activity**.
5. Click **Send Quote** or **Send Order**.

Generating a quote

You can generate a quote using a quote template and a quote record.

1. Open the quote record.
2. Follow the instructions in Performing a mail merge.
3. Progress the opportunity to the next stage in the sales cycle. For example, click **Proposal Submitted** on the Opportunity Summary page. The sample workflow may vary slightly from your customized workflow.
4. Complete the required information and add a tracking note. All changes are reflected on the **Opportunity Tracking** tab.

Turning a quote into an order

1. Open the quote from the Quotes tab within the opportunity.
2. Click **Convert**. The tab displayed switches automatically from the Quotes tab to the Orders tab and the Convert Order page is displayed. **Convert** is available even if the expiration date on a quote has passed. However, you receive a warning message if you try to convert an expired quote.
3. Add the information in the Convert Order page. For more information about available fields, see Convert Order page fields.
4. Click **Save**. When you save the order, a link to the related quote can be accessed from the Associated Quote column in the **Orders** tab. A link to the related order can be accessed from the Associated Order column of the **Quotes** tab. Once the order is saved, you can:
    - **Change Summary**. Gives you access to the Order Summary panel and to the Line Items discount area.
    - **New Line Item**. Allows you to add a new line item to the order.
    - **New Free Text Item**. You can add a free text line item, for example, for a product which is not displayed in your standard price list. You can add a Description, Quantity, and Price for the line item. These line items will be included on the printed order.
    - **New Comment Line Item**. You can add a free text comment, for example, to add extra information about another line item in your quote. You can add a Line Number and a Description. For example, if you add the Line Number 2, then the comment will be positioned as the second line item. If you have already selected other line items, their line item numbers will be re-sequenced. Comment line items will be included on the printed order.
    - **Clone**.Creates a new order based on the existing order information.

- **Merge to Word** or **Merge to PDF**. Mail merges the order with an order template document. If your system administrator has disabled the **Merge to Word** option, **Merge to Word** isn't displayed.
- **Add This Record To A Group**. Adds the order to an existing group of orders to use, for example, as part of a mailing action. For more information, see Groups.

Convert Order page fields

Field	Description
Currency	Currency of the order. This value is carried over from the Currency field on the quote. If there are no line items associated with the order, this field can be edited.
Pricing List	Pricing List of the orders. Read-only. This value is carried over from the Pricing List field on the quote.
Reference	Generated automatically when the order is saved. The format of the Reference is determined by system administrator.
Opened	Date and time the quote was converted to an order.
Delivery Date	Defaults to a set number of days from the date the order is created. The default is defined by your system administrator. You can manually change this date.
Status	Set to Archive, Inactive, or Completed. Defaults to Active. Setting the status to Inactive deducts the Gross Amount of the order from the Total Order Value on the opportunity (if the Include In Quotes Total check box was selected in the original quote).
Description	Short description of the order.
PO Reference	Purchase order or order reference number from the customer.
Contact	Contact person for the order.
Billing Address	Populated by the first "Billing" type address of the company. If there is no billing address, it defaults to the main address for the company. The address type is set via the Type check box field when a new address is created. The address can be changed by selecting an alternative address already associated with the company. A list of existing addresses associated with this company can be selected from the drop-down field below the Billing Address field. Alternatively you can type over the existing address information.
Shipping Address	Populated by the first "Shipping" type address of the company. If there is no shipping address, it defaults to the main address for the company. The address type is set via the Type check box field when a new address is created. The address can be changed by selecting an alternative address from the drop-down field below the Shipping Address field. Alternatively you can type over the existing address information.

Field	Description
Shipping Method	Select from a drop-down list. For example, Courier, Mail.
Discount Type	Select from Percentage or Amount.
Discount Percentage	Percentage discount on the whole order.
Discount Amount	Money amount discount on the whole quote.

Generating an order

You can create an order confirmation to send to the customer and your order fulfillment team.

1. Open the order record.
2. Follow the instructions in Performing a mail merge.

Closing a sale

1. Within the context of the opportunity, click **Sold**. The Progress Opportunity page is displayed.
2. Complete the **Status** details and add a tracking note.
3. Click **Save**. The opportunity is set to a stage of **Sale Agreed** and a status of **Won**.
4. Depending on how your workflow is configured, you might want to create a cross-sell opportunity from this won opportunity. For example, if you win a deal to sell computers, you could create a new opportunity to sell computer maintenance plans. For more information, see Creating a new opportunity.
5. To close the opportunity, click **Closed** from the workflow actions.

Losing a deal

If the deal that you were bidding on is won by another company, you can set the status of the opportunity to **Lost**.

1. Within the context of the opportunity, click **Lost**. The Progress Opportunity page is displayed.
2. Complete the **Status** details and add a tracking note.
3. Click **Save**. The opportunity is set to a stage of **Deal lost** and a status of **Lost**.
4. You can enter information about competitors bidding on the deal, the actual winner of the deal, and the reasons why the deal was lost.

The Quick Sale Workflow and the Standard Opportunity Workflow include a **deal lost** rule.

Manually progressing opportunities

The opportunity workflow functionality automates the progression of opportunities to follow predefined business processes. If your system administrator turns the opportunity workflow off, the workflow actions on the opportunity summary screen are replaced with a **Progress** button. This button allows you to manually change details of the opportunity on the Progress Opportunity screen. Your changes are recorded on the **Tracking** tab.

Viewing the opportunities pipeline

- To view a graphical representation of *In Progress* opportunities assigned to you, click the **My CRM | Opportunities** tab.
  - The pipeline shows the number of opportunities at each stage.
  - Opportunity statistics are displayed beside the pipeline. For more information, see Opportunity statistics panel.
  - Opportunities are summarized in a list below the pipeline.
- To filter your opportunities by stage, click a pipeline segment. Alternatively, select a stage from **Stage** and click **Filter**.
- To toggle back to the full list of opportunities, click the highlighted segment on the pipeline.
- To view more details about a particular opportunity, click the opportunity link in the opportunity summary list.
- To hide the pipeline, click **<My Profile> | Preferences** and set **Show Opportunities Pipeline** to **No**.

Opportunity statistics panel

The information in the Statistics panel is summarized in the table below.

Field	Description
Number of Opportunities	Total number of opportunities for the current stage.
Forecast	Total Forecast value of opportunities for the current stage.
Weighted Forecast	Weighted Forecast value of opportunities for the current stage, that is, Forecast value multiplied by the % certainty.

Field	Description
Average Value	Average Forecast value of opportunities for the current stage, that is Total Forecast value divided by the number of opportunities.
Average Certainty	Total % certainty divided by the number of opportunities.
Weighted Average	Average Value multiplied by Average Certainty.

Running an opportunity report

Opportunity Summary reports provide a quick overview of a particular sales opportunity. To generate a summary report for an opportunity:

1. Find and open the opportunity you want to generate the report for.
2. From the Opportunity Summary page, click **Summary Report**.
   The report is displayed in PDF format.

Viewing current opportunities

To find out which opportunities are currently assigned to you, click the **My CRM | Opportunities** tab.

The list of opportunities currently assigned to you is displayed. If the list is too long, use the filter box to narrow down the results.

Creating an opportunity from other contexts

1. Click the **My CRM | Opportunities** tab and click **New Opportunity**. The new Opportunity is assigned to you by default, but you can also assign it to another user.
2. Fill in the Opportunity details and click **Save**.

When you create quotes and orders outside the context of a company or opportunity, you can search for the quote or order in the following ways:

- On the top bar, click the **Search arrow** and click **Quote** or **Oder**.
- On the top bar, click the **Recent** icon.

Deleting an opportunity

If your security profile allows you to delete opportunities, a **Delete** button appears on the Opportunity summary page in edit mode. If you need to delete opportunities but can't access this button, contact your system administrator.

1. Find and open the opportunity you want to delete. For more information, see Using Find screens.
2. From the Opportunity Summary page, click **Edit**.
3. Click **Delete**, then **Confirm Delete** to delete the opportunity. The opportunity record is deleted from the system.

Creating quotes and orders outside the opportunity context

You can create quotes and orders outside of the Opportunity context. For example, in the context of a Company.

1. Click **New | New Quote** or **New | New Order**.
2. Add the information on the New Quote or Order page. For more information, see Adding products to an opportunity.
3. You can link the quote or order to a company or person at this point using the advanced search buttons.
4. **Save** the quote or order. A new opportunity is automatically created, and the quote or order is linked to the new opportunity.

Sales forecasting

- What is sales forecasting?
- Sales forecasting terminology
- Creating a forecast for yourself
- Submitting a forecast
- Viewing past submitted forecasts
- Working with your team's forecasts
- Administrator access to forecasts

What is sales forecasting?

Sales forecasting:

- Allows individual sales users to flag opportunities in their pipeline to indicate whether they should be included in their sales forecast.
- Allows individual sales users to enter forecasts using their opportunity pipeline as a default starting point.
- Allows sales managers to make their forecast based on their own personal pipeline (if they have one), as well as on the forecasts of their team.

Sales forecasting terminology

This table explains the sales forecasting terminology:

Term	Description
Opportunity	A sales opportunity that is being worked on by a specific sales rep.
Pipeline	The list of opportunities currently assigned to a sales user (in **My CRM | Opportunities**).
Opportunity Forecast Value	Each opportunity has a forecast value given to it by the sales user. This is the number the sales user expects to get if the deal closes.
Opportunity Certainty	A percentage certainty that this deal will close at some point in the future.

Term	Description
Opportunity Target Close Date	The date that the sales user expects this deal to close. This is mandatory, and it provides the basis for deciding which quarterly forecast an opportunity is to be included in.
Opportunity Forecast Scenario	Indicates which elements of a forecast this opportunity should be included in: **Exclude** (leave out of the forecast), **Commit** (the opportunity will definitely close, and the figure is included in Commit, Likely and Best Case), **Likely** (the opportunity will probably close, and the figure is included in Likely and Best Case); **Best Case** (figure is included in the Best Case scenario only).

This table explains forecast-related terminology

Term	Description
Fiscal Year	A period your company uses for accounting purposes. A fiscal year may not be the same as a calendar year. In Sage CRM, a fiscal year is configured by a system administrator.
Quarter	A three month period of the fiscal year set in Sage CRM.
Sales Forecast	A forecast for a given period of time (quarter) for a given sales user, which indicates how much a sales user feels they will close in business. Each forecast contains three values for each month in the quarter: Commit (worst case scenario), Likely and Best Case.
Sales Rep	A sales user who has no-one 'reporting/rolling up' to them—they are responsible for their own pipeline only.
Sales Manager / Boss	A sales user who has one or more other sales users 'reporting/rolling up' to them—they are responsible for including these sub-forecasts in their total forecast.
Rolling Up	In the case of a sales team hierarchy, users can 'roll-up/report to' other users. This is similar to a reporting structure. For example Tim McGraw is the UK sales manager. Peter Johnson and Mathew Ebden are both UK Sales Reps whose forecasts should 'roll-up' to Tim McGraw. When Tim McGraw submits his forecast to the EMEA Sales Manager, he includes any deals he may be working on himself in the forecast. He also includes the forecasts of his team, Peter Johnson and Mathew Ebden.
Quota	The sales target that a sales user has for a month, quarter, or year. Entered by their manager and may be overridden (depending on system settings) by the user themselves.

Creating a forecast for yourself

To work with forecasting, the system administrator must give you rights to access the Forecasts tab. A quarterly forecast is based on existing opportunities whose **Close By** date falls into the quarter you're preparing your forecast for.

To prepare a forecast for Q4 (October to December) this fiscal year:

1. Click **My CRM | Forecasts** to display your list of existing forecasts.
2. If there is no entry in the list yet for this quarter, click **New Forecast**. The Forecast Entry page is displayed, defaulting to the current quarter.
3. Set **Select Required Quarter** to the quarter you want to enter a forecast for. The **Forecast Entry** page is refreshed to show the months in the selected quarter. Opportunities are listed under the month in which their **Close By** date falls.
    - The forecast scenario for every opportunity is set to **Exclude** by default. This means that none of the opportunity forecast values have been included in the forecast figures yet.
    - The **Weighted Forecast** is the Forecast figure multiplied by the Certainty %.
    - Regardless of what currency the forecast figures were entered in, they are converted to the forecast currency specified in the top panel. The forecast currency is specified by the system administrator for each user. If the user sets their preferred currency to a different currency in **<My Profile> | Preferences**, the forecast still uses the defined forecast currency. However, the user can view the totals in the top Summary panel in their preferred currency as well.
    - The pipeline figure in the **Forecast Summary** page is the total weighted forecast by month of everything in the pipeline, regardless of the scenario.
4. Update the forecast scenarios against the opportunities that you included in the forecast. If you do not want to include an opportunity, leave the scenario set to **Exclude**.
    - **Commit** indicates this business will definitely close. The weighted forecast figure is included in the **Commit**, **Likely**, and **Best Case** fields.
5. When you update the forecast scenarios, click the button against each month to display the effect the scenario has on your forecast in the **Forecast Entry** panel.
6. Update the forecast scenarios against the remaining opportunities that you want to include in the forecast.
    - **Likely** indicates that the business will probably close. The weighted forecast figure is included in the Likely and Best Case fields.
    - **Best Case** indicates that the business may close. The weighted forecast figure is included in the Best Case field only.
7. If you have the appropriate rights, you can manually override the forecast figures in the **Forecast Summary** panel. You can also add your monthly sales quota for comparison against the forecast figures. Click **Save** to save the overrides you have made.
8. Click **Continue** to return to the Forecast list.

9. Click **New Forecast** to add a forecast for another quarter and work through the steps described above. Otherwise, to go back and edit the forecast you have been working on, click the forecast in the Forecast list.

Submitting a forecast

1. Click **My CRM | Forecasts** and click the quarterly forecast you want to submit.
   The Forecast Entry page is displayed.
2. Make any final changes you need to, and click **Save And Submit**. This:
   - Makes your forecast available to your roll-up manager. The forecast details are not available to your manager until after you click **Save And Submit**.
   - Adds your forecast to the **Forecast History** tab to give you a static snapshot in time of your submitted forecast.

Viewing past submitted forecasts

1. Click the **My CRM | Forecasts** tab, and click quarterly forecast that you want to review.
   The Forecast Entry page is displayed.
2. Click the **Forecast History** tab. A list of all submitted forecasts for the selected quarter is displayed. There may be several if you're required to submit a forecast on a weekly basis for example.
3. Click the Forecast History you want to review. The **Forecast Entry** page is displayed in read-only mode. You can click an opportunity to view the details of this opportunity as they stood at the time of submitting the forecast. This page is opened in a new browser window, and your system administrator can customize what and how much information is displayed for the selected opportunity.
4. Click **Continue** to return to the **Forecast History** list.

Working with your team's forecasts

Sales Managers have exactly the same forecast tab as other users, except that they see their teams' (users who 'roll up' to them) submitted forecasts in addition to their own forecast.

To view a team’s forecasting information:

1. Click the **My CRM | Forecasts** tab.
2. Click **New Forecast** to create a new forecast.
3. In **Select Required Quarter**, select the fiscal year and quarter of the forecast. Your own forecast is displayed within the **My Pipeline** panel, and your team’s forecasts are displayed in the **My Direct Reports** panel.
   To review the detail of an individual’s forecast and enter the manager’s assessment of the

salesperson's **Commit**, **Likely**, and **Best Case**, click the user. The Forecast Detail Screen for the selected user is displayed. Sales managers can enter their own assessment in the top Forecast Entry panel. When a manager clicks on a subordinate's opportunities, the summary screen for that Opportunity is displayed.

4. Click **Save** to update the manager's assessment.
5. Click **Back** to return to your own **Forecast Detail** screen. Your own assessment of the sales person's forecast is updated in the **My Assessment** panel.
6. Click the magnifying glass icons next to the months to update the overall forecast.
7. Make any final manual changes required to the forecast figures on the top panel.
8. Click **Save And Submit** to submit the full team's forecast. This includes any opportunities the manager is personally working on.

Clicking **Save And Submit** creates a "snapshot in time" in the **Forecast History** tab, in the same way as when an individual sales user submits their own forecast.

Administrator access to forecasts

A user with full system administrator rights can access and submit a forecast for other Sales Users from **My CRM | Forecasts**. To do this, the administrator should log on with their own ID and password, then change the user name in the context area of My CRM. The administrator can then review, change, and submit that user's forecast as if it was their own.

If the administrator moves away from this screen and then uses, for example, the back button to return to the screen, it will be in read-only mode.

Marketing

- Outbound call handling
- Campaign management
- MailChimp campaigns
- Groups
- Working with key attribute profiling data

Outbound call handling

- Introduction to outbound call handling
- Setting up outbound call handling
- Outbound call handling buttons
- Outbound call handling tabs
- Accessing outbound calls
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Introduction to outbound call handling

The Outbound Call Handling module automates outbound phone-based telemarketing campaigns.

Outbound call handling is tailored specifically to high volume telemarketing activities, where calls are not preallocated to individual users and a Communication record is only created when a successful contact is made.

The advantages include:

- Your personal calendar list isn't cluttered with hundreds of campaign-based telephone calls.
- Your quota of campaign calls isn't overlooked if you're out sick or allocated to work on a different project for the day.
- More efficient handling of repetitive calls via **Got Through** and **Get Next Call** buttons.
- In a CTI environment, outbound call handling is automatically CTI-enabled.

The person who manages marketing campaigns in your organization is typically responsible for setting up outbound call lists. They require special security rights to do this. Contact your system administrator for more details.

Setting up outbound call handling

> **Note:** The account you use must have Information Manager rights.

To set up Outbound Call Handling for a campaign, you need to do the following:

- Create an Outbound Call wave activity.
- Create a Outbound Call list.

Creating an outbound call wave activity

Note: The account you use must have Information Manager rights.

When you run the outbound call list, it displays the introductory message that the customer service representative will say when talking with the customer. Merge fields can be used in this introductory text (for example, #pers_firstname#) so that the introductory text can be specific to the person you're making the call to.

Call lists are associated with campaign wave activities and are set up from the Wave Activity page by selecting the Wave Activity Type Outbound Call. When this Type is selected, two new panels are displayed to add the Outbound Call details, and associated workflow buttons to schedule the calls are displayed when the page is saved. These steps assume you have already set up a campaign and campaign waves.

1. Click **Marketing**, then the **Campaign List** tab.
2. Click a campaign.
3. Click a wave.
4. Click **New Wave Activity**.
5. Type in the **Wave Activity Name** and click **Outbound Call** from the **Type** field.
   The Wave Activity page expands to display additional panels.
6. Enter the details on the Wave Activity page and click **Save**.

Outbound call fields

Note: The account you use must have Information Manager rights.

For more information about Wave Activity panel fields, see Wave activity fields.

The table below explains the fields on the remaining panels of the Outbound Call Wave Activity.

Field	Description
Team	Gives access to the Outbound Call list to all users, whose primary team is the same as the team selected in this field. This is not a required field, and if desired, only individual users can be given access to the Outbound Call list by leaving this field blank and adding users in the Users field described below.
Introduction	General greeting or introduction guideline. This can include merge fields, such as #pers_firstname#.
Contact Introduction	Greeting or introduction once you get through to the correct contact person. This can include merge fields, such as #user_firstname#.

Field	Description
Daily Call Target	Target level of daily calls for the Outbound Call list. This is also displayed to the user from the Call Handling page.
Category Group	Link to Key Attribute Category Group. Key Attribute Data set up by the system administrator can be made available to the end user from the Call Handling page.
Users	Users who have rights to access the Outbound Call list from My CRM. Any user can be given access to the call list even if they have a different primary team from the one defined in the team field above.
Priority	Priority of the communication that is automatically created when a user reaches the contact.
Subject	Subject of the communication. This can include merge fields such as #pers_ firstname#.
Communication Details	Default Details of the communication.
Wave Items Communications Team	Default Team of the communication.
Territory	Default security territory of the communication.
Send on	Drip Marketing Call Lists only. When the call list should be scheduled. Options vary depending on the Drip Marketing Campaign Type selected (Anchor, Calendar, or Duration). • **Anchor**. Select the number of days/weeks/months before/after the anchor date at a specified time. • **Calendar**. Send on a specified date/time. • **Duration**. Specify the number of days after the contact is added to the campaign, that the call list should be started. This is the number of days after the contact has become a member of the recipient list - for example, 1 day after they opened and clicked the first email they were sent (if Sent To "Contacts from previous email stages, matching Response Clicked A Link" was selected).

Field	Description
Send to	Drip Marketing Call Lists only. Who should be called. Select from: • **All Contacts in Drip Marketing List** • **Contacts from previous E-mail stages, matching response**. You can select one or more of the following: **Opened**, **No Clicks**, **Clicked a Link**, **Unopened**. This option is disabled for the first Drip Marketing E-mail wave activity of the campaign. • **From Stage**. Select a specific previous stage.
Notification	Drip Marketing Call Lists only. Choose if you want an email notification, sent from Swiftpage, a number of days before the stage is executed.

Creating the outbound call list

Note: The account you use must have Information Manager rights.

1. Click the **Create Call List** workflow button. The Progress Wave Activity page is displayed.
2. Select the **Group** that the Outbound Call list will be created for.
3. Click **Save**. The Outbound Call Summary page is displayed.
   For each person in the group, a record is created in the List of Calls table. This list of customers is used by the system when the agent requests the next call. All details related to the calling of that customer will be saved in the List of Calls table (for example, comments or call attempts).
   To check that the call list has been created, log on as one of the users who has access to the **Outbound Call** list and check the **My CRM | Outbound Calls Lists** tab.

Refreshing the outbound call list

Note: The account you use must have Information Manager rights.

If new contacts who meet the selection criteria are added to the database after you've created the initial call list, you can refresh the list to add these new contacts to the list.

1. From the Outbound Call Summary page, click **Refresh Call List**.
2. Click the **Group** that the call list should be refreshed against.
3. Click **Save**.

Reallocating calls

Note: The account you use must have Information Manager rights.

Calls on the call list are not usually allocated to individual agents (users). Calls are pre-allocated to a user if they have successfully reached a person on the list, and there are other people working at the same company still to call. In this case, these calls are pre-allocated to the user who made the first contact.

A campaign manager can reallocate these pre-allocated calls to another agent from the **Marketing | Outbound Call Summary** page.

1. Click **Reallocate Calls**.
2. Select the users to reallocate the calls from and to and click **Save**.
    - The **Reallocate Calls From Users** list displays all users who have pre-allocated calls.
    - The **Reallocate Calls To Users** list displays all users whose primary team is the same as the Reallocate Calls From user.

Setting up key attribute profiling data on the Call Handling screen

Note: The account you use must have Information Manager rights.

To collect information during the outbound call, the marketing manager or system administrator can set up Key Attribute Profiling data and link it to the call handling screen. This can be used for reporting and future group selections.

The following example illustrates Seminar Attendance Outbound Call wave activity. This example assumes the following data needs to be collected, and has already been set up in the Key Attributes Categories list.

Question	Answer
Received Invitation	• Yes • No
Attending Seminar	• Yes • No
Reason for not attending	• Time • Budget • Not Relevant • Other

Question	Answer
Interested as	• Partner • Prospect • Journalist
Comments	Text

To set up the Call Handling category group for Seminar Attendance data:

1. From **<My Profile> | Administration | Advanced Customization | Key Attributes**, click the **Category Groups** tab.
2. Select **Call Handling Category Groups** from the list.
3. Click **New** .
4. Fill in the necessary details. The fields are described in the table below.
    - **Name**. Name of the category group, for example Seminar Response.
    - **Description**. Longer description of the category group.
    - **Key Attribute Categories**. Highlights the categories to appear on the call handling screen, and click **Add** to move them to the Categories Within Group list.
    - **Search String**. Lets you search the Key Attribute Categories list.
    - **Field Search?**. Extends the search to fields within categories.
    - **Categories Within Group**. Displays the categories you have selected from the Key Attribute Categories list. To change the order, use the arrow buttons.
    - **Related Entity**. Stores the call handling data against an entity—for example, Person, Company, Communication. Select an entity from this list.
    - **Question**. Prefixes the Key Attribute Data on the Call Handling screen with Question text. If this is left blank, then the category name is displayed against the Key Attribute Data.
    - **Preview**. Displays the selected categories and all of their "children".
5. Click **Save**.
6. To link the category group to an Outbound Call wave activity, click **Marketing** and navigate to the Campaign Wave Activity for which you want to collect data.
7. Click a wave activity.
8. Click **Change**.
9. Click the category group from the Category Group field.
10. Click **Save**.

To view and collect key attribute profiling data, click **My CRM | Outbound Call Lists** and click the Outbound Call wave activity that you linked the Category Group to. When you Get a Call and click **Got Through**, the key attribute data is displayed.

The data collected is stored against the entity selected during the Call Handling Category Group setup. For example, if you selected Communications, it is stored with the communication which is created upon completion of the call. You can use this data for reporting, group generation, etc.

If you want the data collected during the call to be visible to the end user from, for example, an additional tab within the Communication tab group, you need to set up a **General Category Group** for the key attribute data. Then, in the usual way, use the Key Attributes action to set up a new tab and link the tab to this Category Group .

You can also restrict this tab to only appear for the relevant Outbound Call wave activity by adding an SQL statement on the tab.

For more information on adding key attribute profiling data to tabs, see Working with key attribute profiling data.

For more information on tab customization, see *System Administrator Help* posted on the Sage CRM Help Center.

Outbound call handling buttons

These buttons are available within Outbound Call Handling.

Button	Description
Get Another Call	Displays the details of the next person on the call list.
Finish Calling	Ends the call session, and displays the Summary page for this call list.
Got Through	Displays the Contact Introduction page and allows the user to gather data relating to the call as defined by the marketing manager.
Exclude	Removes the contact from the call list. The user is prompted for an exclusion reason.
Call Back After	Blocks the contact from the call list until the date/time set.

Outbound call handling tabs

These tabs are accessible from the Introduction page.

Field	Description
Company Summary	Displays the company tabs in a new browser window.
Person Summary	Displays the person tabs in a new browser window.

Field	Description
New Person	Allows you to add a new person from a new browser window.
Quick Look	Displays the Quick Look tab in a new browser window.
New Lead	Allows you to add a new lead from a new browser window. The lead is linked by default to the call list Wave Activity.
New Opportunity	Allows you to add a new opportunity from a new browser window.
New Communication	Allows you to add a new communication from a new browser window.

Accessing outbound calls

You have access to all call lists you have been assigned to work on.

1. Click **<My Profile> | Preferences**.
2. Make sure that the **Show Outbound Calls In My CRM** option is set to **Yes**.
3. Click the **Outbound Call Lists** tab. All outbound call lists that you have been assigned to work on are displayed.
4. Click the call list you want to work on. The Summary page is displayed. The information displayed is divided into individual statistics and wave activity summary.

If you've Info Manager Administration rights, you can also see an additional panel, **Overall Statistics**. The Overall Statistics panel gives a summary of calls made, time spent, and so on for all users working on this call list, including the current user.

Working with outbound calls

Use the action buttons on the right-hand side of the page when working with call lists.

To contact the first person on the call list:

1. Click **Get A Call**.
   The Introduction page is displayed with the following panels: **Call Data**, **Introduction**, and **Person Summary**. If anyone else from the same company is also on the call list, they're exclusively "offered" to the agent (user) who makes contact with the first person from the same company. This is explained in more detail in the next sections. The Introduction panel contains the greeting text defined by the marketing manager when the campaign is set up. For more information, see Outbound call fields. This is a "pre-pitch" prompt to help the user establish that they are talking to the right person. To add a comment from this page, click **Add A Comment** . The comment is stored in the call list record for this person.

2. Click **Got Through**. The Contact Introduction page is displayed. This displays the **Call Data** panel, **Contact Introduction** panel, and data to be collected as defined by the marketing manager. The **Contact Introduction** panel contains greeting text defined by the marketing manager relevant to the correct contact. This is the "pitch" once you've established you're speaking to the correct person.
3. Add the data gathered during the conversation. This gets stored in the system, usually with the Communication or Person record, as defined by the marketing manager or system administrator. A completed communication record is automatically created for each call where the user selects **Got Through**.
4. When you're ready for the next call, click **Get Another Call**. The Introduction page is displayed with the details of the next person to call. If anyone else from the same company is also on the call list, they are exclusively "offered" to the agent (user) who makes contact with the first person from that company. This is to prevent agents who are working on the same call list from calling several people from the same company, and avoid the embarrassing—"my colleague just spoke to someone from your company". It also allows the user to easily switch between the available contacts. "You need to be talking to Arthur, he is handling the business side". Other contacts from the same company who are not on the call list are also displayed.
5. If you can speak to more than one person from the same company on the same phone call, switch to the other person by clicking their name. If you're not able to speak to them on the same call or decide to call them later, they remain assigned to you.
6. To exclude a contact from the list, click **Exclude**. The Exclude From Call List page is displayed.
7. Select a **Reason For Exclusion** and click **Save**. These are defined by the marketing manager or your system administrator.
8. You can toggle the person back onto the call list by clicking **Include**.
9. To block a contact from the call list until after a specific date/time, click **Call Back After**. This can be used if, for example, the contact is on holidays for the next two weeks. The **Call Back After** page is displayed.
10. Set the date and time when the contact is available again, and click **Save**.
11. To finish a session of calls using the current call list, click **Finish Calling**. The **Outbound Calls Summary** page is displayed, showing updated statistics for the current call list.

Campaign management

- What is campaign management?
- Adhering to anti-spam regulation
- Setting up a new campaign
- Cloning a campaign
- Performing an internal mail merge
- Scheduling an internal telesales activity
- Setting up new response codes
- Creating a group from the Wave Activity tab
- Reporting on opportunities generated through campaigns
- Setting up an E-marketing campaign
- Creating an E-marketing email
- Setting up a drip marketing campaign
- Creating a drip marketing email
- Creating a drip marketing call list
- Editing E-marketing email templates
- Analyzing E-marketing campaigns
- Working with the E-marketing User Profile tab
- Checking if a Person or Company record was sent to MailChimp or Swiftpage

What is campaign management?

> **Note:** The account you use must have Information Manager rights.

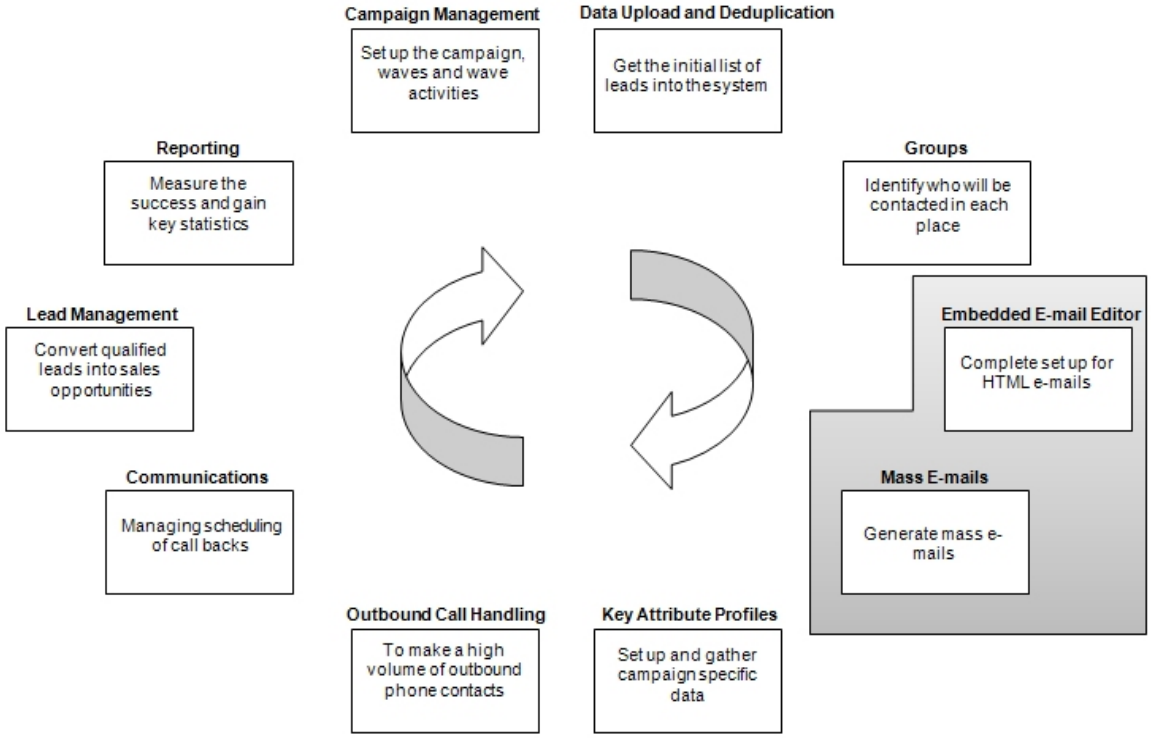
Campaign Management enables you to record activities undertaken as part of marketing campaigns. Campaigns consist of Waves, which in turn consist of Wave Activities.

- **Waves**. Waves are a way of grouping activities within a campaign, normally in chronological order.
- **Wave activities**. Wave Activities define exactly what action is performed for the campaign. For example, Outbound Telesales Activity or Flyer Mailing Activity.
- **Sage E-marketing for Sage CRM**. This is an integration with Swiftpage (http://www.swiftpage.com) that offers E-marketing email functionality from Sage CRM. E-marketing campaigns follow the same basic structure as standard campaigns. They provide

additional features such as email blast scheduling and "open and click" analysis. You can also use standard campaign wave activity types within E-marketing campaigns.

Campaign Management covers all the areas available from the **Marketing** menu button - this includes E-marketing. The typical user operating in this area is the Campaign Manager, who is responsible for setting up and monitoring progress on all campaigns. In practice, marketing activities can be carried out from many areas of Sage CRM - for example an email blast from **My CRM | Groups** - and linked to campaigns set up from the Marketing area. More advanced campaigns can reach beyond the **Marketing** menu and include areas such as Data Upload and Key Attributes.

The shaded area shows the steps which can be substituted with E-marketing campaign steps.



Adhering to anti-spam regulation

Working with E-marketing, even on a trial account, requires strict adherence to anti-spam laws. You must ensure you comply with the US CAN-SPAM Act and your own regional anti-spam regulations. The essence of most regulation is that:

- Email recipients must "opt in" to receiving emails from your company.
- You clearly identify yourself,
- You make it easy for recipients to "opt out".

Useful guidelines and links from Swiftpage can be found here: http://www.swiftpage.com/deliverability/antispampolicy.htm.

Swiftpage does not email any address which has opted out of receiving E-marketing emails from your company. The opt-out flag is synchronized and displayed on the Company, Person, or Lead summary pages associated with the email address that has opted out. You can manually check or uncheck the option, however this has no impact on E-marketing emails sent from Swiftpage (these always retain the opt-out flag set from the E-marketing email).

If you're using the Mass Email feature of Sage CRM, you should add the opt-out flag to the group search criteria to ensure that people who have opted out of receiving emails via E-marketing, do not receive other marketing emails generated using the standard Mass E-mail feature. For more information, see Sending a mass email to a group.

Setting up a new campaign

> **Note:** The account you use must have Information Manager rights.

1. Click **Marketing**.
2. Click the **Campaign List** tab.
3. Click **New Campaign**.
4. Enter the campaign details, and click **Save**.
5. You must be in **Hide Wave Activities** mode to add a new wave from the Campaign Summary page. To toggle between the expanded and summary modes of the Campaign Summary page, click **Show / Hide Wave Activities**.
6. Click **New Wave** to set up the waves, or phases of your campaign.
7. Enter the Wave details and click **Save**.
8. Click **New Wave Activity**.
9. Enter the Wave Activity details and click **Save**.

You have set up the framework of your campaign, and can begin working on the first wave.

Campaign fields

> **Note:** The account you use must have Information Manager rights.

By default, the Campaign page has the following fields:

Field	Description
Campaign Name	Name of the campaign.
Type	Drip marketing campaigns only. Set the drip marketing campaign type to one of the following: • **Anchor**. Wave activities are carried out relative to this date (before and after). For example, a product launch. • **Duration**. Wave activities are carried out in response to other actions. For example, 1 day after a recipient opened and clicked an initial email, they receive a "tips and tricks" newsletter. • **Calendar**. Wave activities are carried out on specific dates. For example, scheduled quarterly newsletters.
Anchor Date	Drip marketing campaigns only, where the type is set to **Anchor**. Enter the date around which the wave activities should be based.
Ends On	Drip marketing campaigns only, where the type is set to **Duration**. Enter the date beyond which wave activities should not be carried out (even if the other criteria are met).
Start	Start date of the campaign.
End	End date of the campaign. Must be on or after the campaign start date. Not available for Drip marketing campaigns, where the **Type** is set to **Duration**.
Status	Status of the campaign. For example, **Active**, **Canceled**, **Finished**, **Pending**. Read-only for Drip marketing campaigns.
Group	Drip marketing campaigns only. The group of recipients is set at the campaign level rather than at the wave activity level. This is because subsequent wave activities (stages) are based on filtered criteria from the original group. For example, you could specify that recipients who open and click the first email are automatically added to the next stage, which may be a drip marketing call list activity. The group must include an email address field and at least one recipient. The group recipients are finalized once the campaign is set to active and any wave activity has started. So even if you use a dynamic group, any changes you make to the group are not reflected in the drip marketing campaign. For more information, see Groups.
Get E-mail From	Drip marketing campaigns only. If the group is based on a source view which contains more than one email field, you can select the one you want to use from the Get E-mail Address From field.
Campaign Budget	Total budget for the campaign.
Actual Cost	Actual cost of the campaign. Calculated field (read-only), based on the Actual Cost values entered against each Wave Activity.

Some special characters are not supported in these fields. For more information, see Special characters that are not supported.

Wave fields

Note: The account you use must have Information Manager rights.

By default, the Wave page has the following fields:

Field	Description
Wave Name	Name of the wave.
Start	Start date of the wave. Must be on or after the campaign start date.
End	End date of the wave. Must be on or after the wave start date.
Status	Status of the wave.
Wave Budget	Total budget for this wave.
Actual Cost	Actual cost of the wave. Calculated field (read-only), based on the Actual Cost values entered against each Wave Activity.

Some special characters are not supported in these fields. For more information, see Special characters that are not supported.

Wave activity fields

Note: The account you use must have Information Manager rights.

By default, the Wave Activity page has the following fields:

Field	Description
Wave Activity Name	Name of the wave activity.
Status	Status of the wave activity. For example, **Pending**, **Active**, **Canceled**, **Finished**.
Type	Type of wave activity. For example, **Internal Telesales**. This determines which workflow actions are displayed to the campaign manager—if Internal Telesales is selected, the workflow action **Schedule Telesales** is available. For the full list of action types, see Campaign wave activity action types.

Field	Description
Details	A short description of the wave activity.
Start	Start date of the wave activity. Must be on or after the wave start date.
End	End date of the wave activity. Must be on or after the wave activity start date.
Group	The group to be used for this wave activity. Not available for Drip marketing wave activities. Required for E-marketing email wave activities. The group for E-marketing E-mail wave activities must be based on a source view which includes an email address field, and must include at least one recipient. If you have not yet created a group for the E-marketing E-mail wave activity, you can do this either from **My CRM | Groups**, or from the **New Group** button in Step 3 of the New E-marketing Campaign Wizard. For other wave activity types, this can be left blank if you have not yet created the group, but it must be completed before clicking the workflow action. For more information, see Creating a group from the Groups tab.
Activity Budget	Total budget for this wave activity.
Actual Cost	Actual cost of the wave activity.

Some special characters are not supported in these fields. For more information, see Special characters that are not supported.

For more information about fields relating to particular wave activities, see the following:

- E-marketing email fields
- Drip marketing email fields
- Outbound call fields

Campaign wave activity action types

> **Note:** The account you use must have Information Manager rights.

The workflow buttons are available only when Campaign Management workflow is enabled.

Action	Description
Outbound Call	Displays the workflow button **Create Call List**. This gives selected users or teams access to a list of contacts to call, using the outbound call handling features.
External Mail Merge	Displays the workflow button **Create File For External Use**. This initiates the export of the selected Group for this Wave Activity to a CSV or text file. This can be sent to a mailing house for processing.

Action	Description
External Telesales	Displays the workflow button **Create File for External Use**. This initiates the export of the selected Group for this Wave Activity to a CSV or text file. This can be sent to, for example, a telesales agency for processing.
Internal Mail Merge	Displays the workflow button **Do Mass Mail Merge**. This initiates the mail merge process.
Drip Marketing Call List	Sets up an outbound call list once the criteria for the drip campaign stage are met. Drip Marketing Call Lists can only be set up within a Drip Marketing campaign. The first wave activity in a Drip Marketing campaign cannot be a Drip Marketing Call List - it must be a Drip Marketing E-mail.
Drip Marketing E-mail	Sends out an email once the criteria for the drip campaign stage are met. Drip marketing E-mails can only be set up within a Drip Marketing campaign. The first wave activity of a Drip Marketing campaign must be a Drip Marketing E-mail wave activity.
E-marketing E-mail	Sends out an email blast on the set date and time, or sends to the email queue for immediate processing. If you're adding the E-marketing E-mail wave activity to a standard campaign, the associated campaign can only be accessed from the E-marketing tab in the future.
Internal Telesales	Displays the workflow button **Schedule Telesales**. This displays the **New Task** scheduling page, which allows the scheduling of calls among a selected number of users.
Other	Does not have an associated workflow button. Can be used for, for example, a print advertising phase of the campaign.

Special characters that are not supported

In most areas of E-marketing campaigns, the following special characters are not supported:
$ % ^ & ( ) { } [ ] ~ | / ? < > , : .

Cloning a campaign

You can clone all campaigns (normal and E-marketing).

1. Click **Marketing | Campaigns** or **Marketing | E-marketing**, and click a campaign.
2. Click **Clone Campaign**.
3. Give the campaign a new name, and select the new start date.
4. Click **Save**.

The start dates for the waves and wave activities automatically adjust to the same offset as the original campaign, based on the new campaign start date. To launch cloned drip marketing campaigns, click **Launch Drip Marketing Campaign** from the Campaign Summary page. **E-marketing E-mail** activities must be edited after cloning to become active.

Performing an internal mail merge

> **Note:** The account you use must have Information Manager rights.

These steps merge the group members with a document template. The steps assume you've already set up a Internal Mail Merge wave activity and a document template. And that the Campaign workflow is switched on for your campaign.

1. Click **Marketing** on the Main menu and click the **Campaign List** tab.
2. Open a campaign and click the **Do Mass Mail Merge** workflow button.
3. Select the group you want to merge with and click **Save**. A list of shared templates is displayed.
4. Select the template you want to use and make any required changes to the template. To insert Sage CRM merge fields, select them from **Insert Sage CRM Field**.
5. Click **Merge and Continue** to perform the merge.
6. When the merge is complete, click the paperclip icon to view the merged document, or click **Continue**. If you don't want to save the merged document as a communication, clear **Create Communication**.
7. Complete the relevant fields in the **Details** and **Scheduling** panels on the Save Merged Document as a Communication page.
8. Click **Save**. The Wave Activity Summary page is displayed, with **Status** set to **Actions Completed**.

Scheduling an internal telesales activity

> **Note:** The account you use must have Information Manager rights.

To schedule follow-up calls for the marketing team:

1. Click **Wave Activity**.
2. Click the **Schedule Telesales** workflow button.
3. Select the group and click **Save**. The New Task page is displayed with special scheduling options to distribute the calls among your marketing team.
4. Select the team members who will perform the calls from the list of users.
5. Set the start date and time from the calendar and time fields.

6. Use the **Scheduling Options** to set the maximum number of calls per day.
    - If the **Round Robin Broker Rule** is selected, the number of calls per day is the maximum number of calls distributed evenly per user per day.
    - If the **Queue Broker Rule** is selected, the number of calls per day will be the maximum number of calls distributed per day to the selected team. The Queue Broker Rule can only be used if a Team has been selected.
7. Select the **Internal Actions** option in the Parent Category field. This field stores the static list of recipients for this particular phone follow-up in Key Attribute Data.
8. Click **Save**.
9. To see the full list of calls that have just been scheduled, click the **Communications** tab within this Wave Activity summary.

The Marketing team can now work through the follow-up calls from their respective calendars, and select the relevant response code as they complete each call.

Setting up new response codes

> **Note:** The account you use must have Information Manager rights.

A standard set of response codes is supplied with a standard installation. The standard response codes are Good, Bad, Indifferent, or None. These can be captured against any communication which is linked to a campaign.

For example, when you schedule follow-up calls for a mail shot linked to a campaign, you can add a response code at the end of the telephone call. When all calls are completed, you can create a group based on people who responded in a certain way.

You can define new response codes for each campaign, or even for each Wave Activity within a campaign. Response codes defined at the Wave Activity level apply to all communications linked to that Wave Activity. If no response codes have been defined at the Wave Activity level, then those defined at the Campaign level will apply to the associated communications. If you do not define any new response codes, the standard Sage CRM response codes are available.

This section shows you how to create new response codes customized to a particular Wave Activity. If the set of data to be collected during a campaign wave activity is more complex, you should use Key Attribute Profiling and Outbound Call Handling instead. Response codes are suitable for a single expected outcome of a campaign wave activity. For example, for a Follow-up Call Wave Activity, the following response codes are required:

- A - Purchase within 3-6 months
- B - Purchase within 6-12 months
- C - Purchase decision >12 months
- D - No Interest

To set up a new Response Code:

1. Click **Marketing** .
2. Click the campaign in which you want to set up the response codes. Make sure you're viewing the expanded campaign page (click **Show Wave Activities** if it is visible) and can see the wave activities in the campaign.
3. Click the wave activity in which you want to set up the response codes. The Wave Activity Summary page is displayed.
4. Click **Response Setup**.
5. Add a code name (as it should appear to the user) in the **Add Translation** field, for example, **3-6 Months**.
6. Add a short code for the response code, for example **A36**.
7. Click **Add**.
8. Continue adding the rest of the codes and translations.
9. When you have added all of the codes you need, click **Save**.

You can verify that the codes have been set up correctly by linking an existing communication to this Wave Activity. The list of responses you created should appear in the **Response Type** field list.

Note: If you delete or change a response code in the middle of a campaign, any communications that are already linked to the old response code remain linked to the old code. However, the next time a user links a code to a communication, they will only be able to choose from the new list of codes.

Creating a group from the Wave Activity tab

Note: You must have information manager rights.

When you create a group from the **Wave Activity** tab in the **Marketing** area, you can filter and manage responses to individual wave activities. For example, you can create a dynamic group to filter and record all positive responses to a wave activity.

1. Click **Marketing | Campaign List**.
2. Click the campaign link, then click the wave activity link.
3. Click **Create New Group**.
4. Ensure the correct wave activity is displayed in **Select Wave Activity**.
5. Enter a **Name** and **Description** for the group.
6. Select the type of user that can access the group from **Available To**.
7. Select the response filter to apply to group members from **Responses**. Only records with this assigned response are included in the new group.

8. Click **Preview List** to review the new group.
9. Click **Save**.

Exporting a group

> **Note:** The account you use must have Information Manager rights.

This step assumes you've already set up a External Mail Merge wave activity and a document template. This step also assumes that the Campaign workflow is switched on for your campaign.

1. Select a wave activity with an External Mail Merge type.
2. Click **Create File For External Use**.
3. Confirm the group to be exported from **Group**.
4. Click **Save**. If the output file already exists, it's overwritten with no warning.
5. Select **Spreadsheet (CSV)**. The list of contacts is displayed in spreadsheet format in a new window.
6. Complete the communication and export details and click **Save**. This allows a record to be kept against the wave activity and each person in the group. You can view the link to the exported group from **My CRM | Shared Documents**.
7. Once the wave activities are completed, click **Completed** to change the status of the wave activities. You can also update the actual cost of the wave activities and the wave status.

Reporting on opportunities generated through campaigns

> **Note:** The account you use must have Information Manager rights.

- In the context of a campaign, the **Report** tab displays a running status of the success of the campaign.
- Opportunities generated as a result of this campaign should be linked to the relevant wave activity via the **Wave Activity** field on the Opportunity record.
- To measure other types of information about the campaign, click **Report** to create or use existing reports.

Setting up an E-marketing campaign

> **Note:** The account you use must have Info Manager Administration Rights and E-marketing enabled.

Before you start, make sure that:

- Your E-marketing Administrator has enabled you for E-marketing. Check that you have access to the E-marketing action button (New E-marketing Campaign) from **Marketing | E-marketing**.
- You have completed the email address verification with Swiftpage. Check your Junk or Spam email folder if you have not received it yet.
- You have access to the Internet. This allows communication between Sage CRM and Swiftpage.

To set up an E-marketing campaign:

1. Click **Marketing | E-marketing**, and click **New E-marketing Campaign**.
2. Complete the Campaign fields and click **Next**. For more information, see Campaign fields.
3. Complete the Wave fields and click **Next**. For more information, see Wave fields.
4. Complete the Wave Activity fields and click **Next**. For more information, see Wave activity fields.
5. Complete the E-marketing E-mail fields. For more information, see E-marketing email fields.
   You can **Preview Recipients** to review who will receive the email.
6. Click **Save & Send**. If you have not put a date/time in the Schedule Mail field, the email blast is sent to the email queue for immediate processing. An E-marketing E-mail communication is created for the user. Once results have been synchronized back to Sage CRM from Swiftpage, the communication status is updated to **Complete**, and the Communication record is displayed in the **Communications** tab of each recipient. Swiftpage also sends an email notification including statistics on the number of emails sent, bounced, and failed.

   > **Note:** Once a E-marketing wave activity is completed, and the information is synchronized back to Sage CRM from Swiftpage, a status banner is displayed at the top of the wave activity.

7. Click **Continue** to return to the E-marketing Wave Summary page. From here you can add more wave activities to the same campaign wave.

Creating an E-marketing email

> **Note:** The account you use must have Info Manager Administration Rights and E-marketing enabled.

You can create an E-marketing email in a number of ways:

- In Step 3 of the E-marketing Campaign wizard. See Setting up an E-marketing campaign.
- By clicking **New E-marketing E-mail** from **My CRM | Groups**. See Sending E-marketing emails to a group.
- By adding an E-marketing E-mail wave activity to an existing E-marketing or normal campaign. See below.

To create an E-marketing email:

1. From either **Marketing | Campaign List** or **Marketing | E-marketing**, click a campaign.
   If you're adding the E-marketing E-mail wave activity to a standard campaign, the associated campaign can only be accessed from the **E-marketing** tab in the future. Click **Cancel** if you do not want to proceed.
2. Drill down to a campaign wave, and click **New Wave Activity**.
3. Complete the Wave Activity Fields, making sure that the **Type** is set to **E-marketing E-mail**.
4. Complete the E-marketing E-mail fields. For more information, see E-marketing email fields. You can click **Preview Recipients** to review the people who will receive the email.
5. Click **Save & Send**.
   If you have not put a date/time in the Schedule Mail field, the email blast gets sent to the email queue for immediate processing.
   An E-marketing E-mail communication is created for the user. Once results have been synchronized back to Sage CRM from Swiftpage, the communication status is updated to Complete, and the communication record is displayed in the **Communications** tab of each recipient. An email notification is also sent from Swiftpage including statistics on the number of emails sent, bounced, and failed.
6. Click **Continue** to return to the E-marketing Wave Summary page. From here you can add more wave activities to the same campaign wave. For example, this could be another E-marketing email or any other standard wave activity types.

E-marketing email fields

Note: The account you use must have Info Manager Administration Rights and E-marketing enabled.

Field	Description
Subject	The subject line for the email. The following special characters must not be used in this field: $ % ^ & ( ) { } [ ] ~ | / ? < > , : .
Send As	Choose from a drop-down of enabled and verified E-marketing users. You can select active or inactive E-marketing users to send the email from. The email is sent from the email address associated with the selected user.

Field	Description
Group (Recipients)	Select from a list of all groups you have access to - for example a mix of your own private groups, and those made available to all users. If you have not yet created a group for the E-marketing E-mail wave activity, you can do this either from **My CRM | Groups**, or from the **New Group** button in Step 3 of the New E-marketing Campaign Wizard.
Get E-mail Address From	Select the source of the email address. All email addresses included in the view, used to create the group, are displayed for selection. For example, if you have a group based on the Company Group view, you can choose between the Person's Business E-mail or the Company's Business E-mail address to send the email to.
Template	Select from a list of global and local templates available in the Swiftpage Template Manager. If you want to upload a custom template to use in the E-marketing email, go to **E-marketing | Edit E-mail Templates** first. Once uploaded, the custom template displays in the list. For more information, see Editing E-marketing email templates.
View/Edit Template	Allows you to preview and edit the template in the Swiftpage Template Manager.
Personal Message	A short block of text specific to this wave activity, which can be added as a merge field to an email template. This means that you can reuse the same template for a number of wave activities. For example "Get the Early Bird Rate" in the first wave activity, and "Last chance for the Early Bird Rate" in the next wave activity. The following special characters must not be used in this text: ^ { } [ ] ~ | / < >
Schedule Mail	Set the date and time to send the email blast, or leave blank to send to the email queue for immediate processing.

Setting up a drip marketing campaign

Note: The account you use must have Manager Administration Rights and E-marketing enabled.

1. Ensure the following:
   - Your E-marketing Administrator has enabled you for drip marketing. Click **Marketing \| E-marketing**and ensure you can access the **New Drip Marketing Campaign** action button.
   - You've completed the email address verification with Swiftpage. When your E-marketing Administrator enables you for E-marketing, you should receive an automated verification email. Check your junk or spam email folder.
   - You've access to the Internet. Sage CRM and Swiftpage communicate over the Internet.
2. Click **Marketing \| E-marketing** and click **New Drip Marketing Campaign**.

3. Complete the Campaign fields and click **Continue**. For more information, see Campaign fields.
4. Complete the Wave fields and click **Continue**. For more information, see Wave fields.
5. Complete the Wave Activity fields and click **Continue**. For more information, see Wave activity fields. The first wave activity of a drip marketing campaign must be a drip marketing email.
6. Complete the Drip Marketing Email fields. For more information, see Drip marketing email fields.
7. Click **Preview Recipients** to review the people who will receive the email.
8. Click **Save & Send**.
9. Click **Continue** to return to the Drip Marketing Wave Summary page and add more wave activities to the campaign wave. For example, you could add another drip marketing email, or another standard wave activity types.
   Standard wave activity types can use their own Groups, even if they are set up within Drip Marketing campaigns. They are executed separately by user-driven workflow, rather than Drip Marketing automation.
10. When you're ready to start the Drip Marketing campaign, click **Launch Drip Marketing Campaign** on the E-marketing Campaign Summary page. You cannot change the campaign once it's been launched. If you need to make changes, click **Suspend Drip Marketing Campaign**.

Creating a drip marketing email

> **Note:** The account you use must have Info Manager Administration Rights and E-marketing enabled.

You can create a drip marketing email:

- In Step 3 of the Drip Marketing Campaign wizard. See Setting up a drip marketing campaign.
- By adding a Drip Marketing E-mail wave activity to an existing Drip Marketing campaign. See below.

To create a Drip Marketing E-mail wave activity:

1. Click **Marketing | E-marketing**, click an existing drip campaign.
   A drip marketing wave activity can only be set up as part of a drip marketing campaign.
2. Drill down to a campaign wave, and click **New Wave Activity**.
3. Complete the Wave Activity Fields, making sure that the Type is set to **Drip Marketing E-mail**.
4. Complete the Drip Marketing E-mail fields. For more information, see Drip marketing email fields.
5. Click **Save**. A Drip Campaign communication is created for the user. Once the email has been sent by Swiftpage, the communication status is updated to Complete, and the communication record is displayed in the **Communications** tab of each recipient.
6. Click **Continue** to return to the Drip Marketing Wave Summary page. From here you can add more wave activities to the same campaign wave. For example, this could be another Drip Marketing email or any other standard wave activity type.

Drip marketing email fields

Note: The account you use must have Info Manager Administration Rights and E-marketing enabled.

Field	Description
Subject	The subject line for the email. Special characters must not be used in the Subject line.
Template	Select from a list of global and local templates available in the Swiftpage Template Manager. If you want to upload a custom template to use in the Drip Marketing email, go to **E-marketing | Edit E-mail Templates** first. Once uploaded, the custom template displays in the list. See Editing E-marketing email templates for more information.
View/Edit Template	Allows you to preview and edit the template in the Swiftpage Template Manager.
Personal Message	Add a personalized introduction to the email.
Send On	When the email should be sent. Options vary depending on the Drip Marketing Campaign Type selected (Anchor, Calendar, or Duration). • **Anchor**. Select the number of days/weeks/months before/after the anchor date at a specified time. • **Calendar**. Send on a specified date/time. • **Duration**. Specify the number of days after the contact is added to the campaign, that the email should be sent out. If this is the first wave activity, this is the number of days after the drip launch. If it is a later stage in the campaign, then it is the number of days after the contact has become a member of the recipient list - for example, 1 day after they opened and clicked the first email (if Sent To "Contacts from previous email stages, matching Response Clicked A Link" was selected).

Field	Description
Send To	Who the email should be sent to. Select from: • **All Contacts in Drip Marketing List** • **Contacts from previous E-mail stages, matching response** (one or more can be selected): Opened, No Clicks, Clicked a Link, or Unopened. This option is disabled for the first Drip Marketing E-mail wave activity of the campaign. • **From Stage** - select a specific previous stage. This option is disabled for the first Drip Marketing E-mail wave activity of the campaign.
Notification	Choose if you want an email notification, sent from Swiftpage, a number of days before the stage is executed.

Creating a drip marketing call list

Note: The account you use must have Info Manager Administration Rights and E-marketing enabled.

1. Click **Marketing | E-marketing**, click an existing drip campaign.
   A drip marketing wave activity can only be set up as part of a drip marketing campaign.
2. Drill down to a campaign wave, and click **New Wave Activity**.
3. Complete the Wave Activity Fields, making sure that the Type is set to **Drip Marketing Call List**.
4. Complete the Drip Marketing Call List fields. For more information, see Outbound call fields.
   You must assign either a team, or one or more users, to carry out the Drip Marketing Call List wave activity.
5. Click **Save**. A Drip Campaign communication is created for the user. Once the email has been sent by Swiftpage, the communication status is updated to **Complete**, and the communication record is displayed in the **Communications** tab of each recipient.
6. Click **Continue** to return to the Drip Marketing Wave Summary page. From here you can add more wave activities to the same campaign wave. For example, this could be a Drip Marketing email, another Drip Marketing call list, or any other standard wave activity type.

Editing E-marketing email templates

Note: The account you use must have Info Manager Administration Rights and E-marketing enabled.

You can edit existing, and add new templates from either of the following areas:

- **Marketing | E-Marketing | Edit E-mail Templates**
- Selecting **View/Edit Template** within an E-marketing E-mail or Drip Marketing E-mail wave activity.

Both these methods take you to the Swiftpage Template Manager. From here you can:

- Upload custom templates
- Store referenced graphics
- Share templates with other E-marketing users
- Insert merge fields into standard templates. The standard merge fields available include:

Template Editor Merge Field	Sage CRM
Personal Message	Personal message entered in Wave Activity.
E-mail Address	E-marketing user's email address.
First Name	Person (recipient) first name.
Last Name	Person (recipient) last name.
Phone	Person (recipient) full phone number.
Business Suffix	Person (recipient) suffix. For example, PhD, MD.
Company	Company name of the recipient.

You can also use any Sage CRM field name, which has been included in the Group Contents, of the group that the e-marketing email is going out to. The field name must be enclosed in double square brackets, for example, **[[pers_title]]**.

Click the help button within Swiftpage for further assistance.

Analyzing E-marketing campaigns

> **Note:** The account you use must have Info Manager Administration Rights and E-marketing enabled.

The E-marketing Analysis tab is displayed in the context of Campaigns and Wave Activities, and shows results from E-marketing E-mails and Drip Marketing E-mails. In the Wave Activity context you can drill down on individual reports, for example, Open & Clicks, and export them to Excel, or create a new group of recipients from the report results.

The results are updated nightly (03:00 Mountain Time - GMT -6 hrs/-7 hrs) with information pulled from Swiftpage.

To view E-marketing analysis data at the Wave Activity level:

1. From the E-marketing Wave Activity Summary tab, switch to the **E-marketing Wave Activity Analysis** tab. The top panel shows a summary of the results, the bottom panel provides hyperlinks to analysis reports. The tables below explain the columns and reports.
2. Click a report, for example, the **Open & Clicks** report. A list of recipients meeting the report criteria is displayed.
3. From the report results you can **Create New Group**, **Export To Excel**, or **Export To PDF**. You can use the filter box on the right-hand side of the screen to narrow the list. For example, recipients where the number of clicks is greater than 2 - and then base your new group of the filtered list.
4. Click **Continue** to return to the **Analysis** tab.

E-Marketing Results Summary Columns

Column	Description
Subject	Subject of the E-marketing or Drip E-mail. Click to open the Wave Activity Summary page.
Submitted	The number of emails that were submitted for sending (the number of the recipients in the group).
Sent	The number of emails actually sent (submitted minus duplicate, invalid, or opted out email addresses).
Unsent	The number of emails that were not sent due to duplicate, invalid, or opted out email addresses.
Bounced	The number of emails that bounced back due to invalid email addresses or domain names. When an email bounces back three times from the same email address within a 60-day period, the fourth and further times that the same email address is blasted, the email does not go out, and is counted as **Unsent**.
Unique Opens	The number of individuals, who opened the email, regardless of how many times they opened it.
Unique Clicks	The number of individuals, who clicked on any link in the email. An individual can only count once per link within an email.
Total Clicks	The total number of times any of the links were clicked on within any of the emails sent out. An individual's clicks on a link counts more than once.

E-marketing Results Analysis Reports

Report	Description
Open & Clicks	For each recipient, shows the: • Time they first opened the email • Number of times they opened the email • Number of times they clicked on a link
Unique Opens By Time	Shows the: • Local time stamp of the first time that the recipient opened the email • Number of times they opened the email The report is sorted by the local time column.
Unique Opens By E-mail	Shows the number of times each recipient opened the email, sorted by email address.
Opens By E-mail	Shows the local time that the email was opened, sorted by email address.
Opens By Time	Shows the local time that the email was opened, sorted by opened time.
Unique Clicks By Link	Shows the address of each link in the email, and the email address of the recipient who clicked on it, sorted by link.
Unique Clicks By E-mail	Shows the number of times each link was clicked on, sorted by email address.
Clicks By Link	Shows the first click and total number of clicks for each link, sorted by email address.
Unopened	Shows a list of recipients where the email remained unopened.
Bounced	Shows a list of recipients where the email bounced.
Unsent	Shows a list of recipients where the email was unsent and a reason (supplied by Swiftpage).

Working with the E-marketing User Profile tab

The **E-marketing User Profile** tab is accessed from **My CRM | E-marketing User Profile**. You can view the user information associated with your E-marketing account from this area. You can also edit some of the details, for example, the email address associated with your E-marketing user profile (your **Send From** address).

To edit your E-marketing User Profile:

1. Click **My CRM | E-marketing User Profile**, and click **Change**.
2. Update the details, for example, your email address.
3. Click **Save**. If you change the email address, the verification email is automatically resent.
4. Go to your email inbox and click the verification link to complete the change. You can click the **Resend Verification E-mail** button if you delete the first email by mistake before completing the verification process.

Checking if a Person or Company record was sent to MailChimp or Swiftpage

1. Open the Person or Company record you want to check.

   > **Tip:** You can quickly search for the record you want to open. For details, see Using Quick Find.

2. On the **Summary** tab, see the value of the **This record was sent to** option.

   Possible values:

   - **<blank>** Indicates that the record hasn't been sent to MailChimp or Swiftpage.
   - **MailChimp**
   - **Swiftpage**
   - **MailChimp and Swiftpage**

> **Note:** To completely remove the personal data of a person or lead from Sage CRM, you need to manually delete that data from the linked MailChimp and Swiftpage accounts. For details, see the documentation provided by MailChimp and Swiftpage.

MailChimp campaigns

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About MailChimp

> **Warning:** Your account must have rights to use MailChimp campaigns.

MailChimp campaigns let you send automated emails to groups of contacts from Sage CRM. You can build campaigns using predefined templates or create a new template from scratch.

You can create a list of campaign subscribers in MailChimp using Sage CRM contacts. It's best to use a single MailChimp list and to add groups of contacts to the list as needed. When you send a group of Sage CRM contacts to the MailChimp list, a new static segment is created in the list to record these subscribers. A Sage CRM contact can be included in multiple segments in the MailChimp list. You can reuse these segments but you cannot edit them.

Once you've kicked off a MailChimp campaign, you can view how recipients have interacted with the campaign emails so you can follow up with appropriate actions.

Adhering to anti-spam regulation

Working with MailChimp campaigns, even on a trial account, requires strict adherence to anti-spam laws. You must ensure you comply with the US CAN-SPAM Act and your own regional anti-spam regulations. The essence of most regulations is that:

- Email recipients must subscribe to receive emails from your company.
- You clearly identify yourself.
- You make it easy for recipients to unsubscribe from your campaign lists.

Useful guidelines and links from MailChimp can be found here: http://mailchimp.com/legal/acceptable_use/.

Every night, MailChimp updates Sage CRM to remove unsubscribed recipients. The **Opt out of E-Marketing** checkbox on a Company, Lead, or Person record indicates whether the record has unsubscribed from a MailChimp campaign.

Logging on to MailChimp

> **Note:** Your account must have rights to use MailChimp campaigns

Before you can start working with MailChimp from Sage CRM, you must log on to your MailChimp account. If you don't have an account, contact your system administrator.

1. Go to the MailChimp logon page at https://login.mailchimp.com .
2. Enter your user name and password.
3. Select **Stay logged in**.
4. Click **Log In**.

Adding contacts to a MailChimp list

> **Note:** Your account must have rights to use MailChimp campaigns.

Before you set up a MailChimp campaign, you must first create a group of contacts that you want to send campaign emails to and upload the group to the existing MailChimp list. If you update a Sage CRM group that you've already uploaded to the MailChimp list, the updated group becomes a new segment (group) in MailChimp.

1. Click **My CRM | Groups** and create a new group or edit an existing group.
   For more information, see Creating a group or Editing a group.

   The group must meet the following requirements:

   - Include Company, Person, or Lead records only. Custom entities are not supported.
   - Each contact in the group must have the required email field populated with a valid email address. The required email fields are:
     For a Company record: **Company: Business Email (comp_emailaddress)**
     For a Person record: **Person: Business Email (pers_emailaddress)**
     For a Lead record: **Lead: Email (lead_personemail)**

     > **Note:** If a contact doesn't have an email address, it won't be added to the MailChimp list. The contact's email address is the unique identifier for the record in MailChimp. So if you send a contact with an email address to MailChimp, and then update the email address in Sage CRM and resend it to MailChimp, the updated record is treated as a new record and recipient in MailChimp. This can impact your campaign statistics and your quota of emails that you're allowed to send.

   - The group must include a column containing the required email field. If this column is missing, the **Send to MailChimp** button doesn't appear.
   - The group name must not exceed 80 characters. If it's greater than 80 characters, the group details aren't added to the existing MailChimp list.

   > **Note:** If you use a static group, you can't add any new people to the group. If you need to add people to the group later, create a dynamic group. For more information about static and dynamic groups, see About groups.

2. Click **Send to MailChimp**.

3. Click the **Notifications** icon on the top bar to see if the group was sent successfully to MailChimp. A MailChimp notification displays the number of contacts with new or updated email addresses that were successfully sent to MailChimp, the number of contacts with missing email address that were sent to MailChimp, and the number of contacts that MailChimp couldn't process. These unprocessed contacts are counted as errors and included in an error group. You can click the error count in the notification to open the group and correct the contact details.

Creating a MailChimp campaign

> **Note:** Your account must have rights to use MailChimp campaigns

Before creating a MailChimp campaign, ensure that:

- You have set up a group of email recipients you want to use in the campaign.

  The group must meet the following requirements:

  - Include Company, Person, or Lead records only. Custom entities are not supported.
  - Each record in the group must have the required email field populated with a valid email address. The required email fields are:
    For a Company record: **Company: Business Email (comp_emailaddress)**
    For a Person record: **Person: Business Email (pers_emailaddress)**
    For a Lead record: **Lead: Email (lead_personemail)**
  - The group must include a column containing the required email field. If this column is missing, the **Send to MailChimp** button doesn't appear.
  - The group name must not exceed 80 characters. If it's greater than 80 characters, the group details aren't added to the existing MailChimp list.
- You have added the group to the existing MailChimp list. For more information, see Adding contacts to a MailChimp list.
- Your computer is connected to the Internet and you have logged on to your MailChimp account. For more information, see Logging on to MailChimp.

To create a MailChimp campaign:

1. Click **My CRM | MailChimp Campaigns** and click **New**.
2. Use the following fields to specify the campaign details:
   - **Campaign Name**. Enter the campaign name. Don't use special characters such as a backslash or quotation marks at the start of the campaign name, as this results in an error.
   - **From Email Address**. Specify the email address from which campaign emails are sent.
   - **From Name**. Enter the sender's name that appears on campaign emails.
   - **Segment**. Select the group to which campaign emails are sent.
3. Click **Create Campaign**.

MailChimp opens in a new browser window. If it doesn't open, ensure pop ups aren't blocked in your browser.
Complete the following steps in MailChimp.

1. Check that your campaign details are correct. It is a good idea to include merge fields in **To** so the campaign is more personal. The merge fields that you can add depend on the context and underlying view you used when defining the group (segment). For more information, see MailChimp campaign merge fields and http://mailchimp.com/features/merge-tags.
2. Click **Next**.
3. Select a template and add the image and content that you want to include. Click **Save & Close**.
4. Click **Next** and confirm that all elements in your template are correct.
    - If there's a problem, click **Resolve** to fix it.
    - If you want to make a change to any element, click **Edit**.
5. Save, schedule or send your campaign.
    - To send the email straight way, click **Send** and **Send Now**.
    - To save the email and schedule a time to send it, click **Schedule**. Specify the delivery options and click **Schedule Campaign**.
    - To save the email and return to Sage CRM, click **Save and Exit** at the top of the screen. When you're ready to send it, click **Open Campaign** in Sage CRM and then click **Send** in MailChimp.

There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you go over this number of emails or subscribers, an error message appears when you try to send a campaign. If you have too many subscribers, you can delete contacts from the MailChimp list. For more information, see Delete a Group. Alternatively, contact your system administrator to upgrade to a paid plan. For more information, see MailChimp Pricing.

MailChimp campaign merge fields

Note: If you have MailChimp administrator rights, you can rename Sage CRM merge fields in MailChimp. For more information, see the System Administrator Help.

Field label and type	Sage CRM field name
Company name	COMPNAME
Company email address	COMP_EMAIL
Company type	COMP_TYPE
Company status	COMP_STATU
Company source	COMP_SOURC
Company territory	COMP_TERRI
Company revenue	COMP_REVEN

Field label and type	Sage CRM field name
Company employees	COMP_EMPLO
Company sector	COMP_SECTO
Company website	COMP_WEB
Person first name	FNAME
Person last name	LNAME
Person email address	PER_EMAIL
Person salutation	PER_SALUTA
Person title	PER_TITLE
Person title code	PER_TITLEC
Person department	PER_DEPART
Person status	PER_STATUS
Person source	PER_SOURC
Person gender	PER_GENDE
Lead description	LEADDESC
Lead person email	LEA_EMAIL
Lead company name	LEA_COMPNA
Lead first name	LEA_FNAME
Lead last name	LEA_LNAME
Lead company country	LEA_COUNTR
Lead salutation	LEA_SALUTA
Lead source	LEA_SOURCE
Lead stage	LEA_STAGE
Lead status	LEA_STATUS

Closing a MailChimp campaign

Note: Your account must have rights to use MailChimp campaigns.

You can set the status of a MailChimp campaign to *Closed*. This doesn't affect the campaign status in MailChimp. Closing MailChimp campaigns in Sage CRM is particularly convenient when you have a long list of campaigns and want to move some old or unused campaigns out of your way.

Warning: You cannot change the status of a closed campaign.

1. Click **My CRM | MailChimp Campaigns**.
2. Click the campaign hyperlink.
3. Click **Close Campaign**.
4. When prompted if you want to close the campaign, click **Yes**.

Deleting a MailChimp campaign

Note: Your account must have rights to use MailChimp campaigns.

You can delete a MailChimp campaign from Sage CRM. When you delete a campaign, the campaign records remain in MailChimp.

1. Click **My CRM | MailChimp Campaigns**.
2. Click the campaign hyperlink.
3. Click **Delete**.

Filtering MailChimp campaigns by status

Note: Your account must have rights to use MailChimp campaigns.

You can filter MailChimp campaigns based on their status in Sage CRM.

1. Click **My CRM | MailChimp Campaigns**.
2. Under **Status**, select the status by which you want to filter the campaigns.
   You can select **--All--**, **Closed**, **Saved**, or **Sent**.
3. Click **Filter**.

Viewing MailChimp campaign results

Note: Your account must have rights to use MailChimp campaigns.

Data from all campaigns is automatically synchronized from MailChimp to Sage CRM so you can see updated statistics about recipient interaction with your campaign emails. The frequency of synchronization is set by your system administrator.

- Viewing all results of a MailChimp campaign
- Viewing campaign results for a Person or Company record

Viewing all results of a MailChimp campaign

Note: Your account must have rights to use MailChimp campaigns.

1. Click **My CRM | MailChimp Campaigns**.
2. Click a campaign hyperlink. Statistics about this campaign are displayed in the MailChimp Campaign Results panel. The time and date at which the campaign was created are also displayed.
3. To manually synchronize the data for this campaign, click **Refresh**.
4. Click a hyperlink to view more detailed information about any of these statistics in Sage CRM. See the table below for an explanation of each statistic.
5. For additional information, click **View in MailChimp** to open the campaign in MailChimp.
6. To create a contact group based on the recipients in a statistic group, click **Create New Group**. You can create a dynamic or a static group. You can apply follow up actions to this group as appropriate to make your campaign even more targeted and relevant. Once you've created this group, you can't edit it.
7. A communication record is created for each email recipient. Your system administrator specifies how often communication records are created. Click the **Communications** tab for the relevant company, person, or lead record to view information about the MailChimp campaign email that they received. Click the campaign email link to open a copy of the email.

Statistic	Description
Total Opened	The total number of times that all emails were opened. For example, if you send ten emails and each recipient opens each email five times, the value of **Total Opened** is 50.
Total Clicked	The total number of times that all links were clicked. For example, if you send ten emails with one link in each and each recipient clicks the link five times, the value of **Total Clicked** is 50.
Hard Bounces	The number of emails marked as hard bounces by MailChimp. For more information, see Soft vs Hard Bounces.
Soft Bounces	The number of emails marked as soft bounces by MailChimp. For more information, see Soft vs Hard Bounces.
Unsubscribed	The number of recipients who unsubscribed from your campaign.

Statistic	Description
Emails Sent	The total number of emails that were sent.
Unique Opened	The number of individual emails that were opened. For example, if you send ten emails and each recipient opens each email five times, the value of **Unique Opened** is 10.
Unique Clicked	The number of times an individual link in an email was clicked. For example, if you send ten emails and each recipient clicks the link five times, the value of **Unique Clicked** is 10.
Last Opened	The last date on which an email was opened.

Viewing campaign results for a Person or Company record

Note: Your account must have rights to use MailChimp campaigns.

1. Open the Person or Company record for which you want to view the MailChimp campaign results. You can quickly search for the record you want to open. For details, see Using Quick Find.
2. Click the **Marketing** tab and see the MailChimp campaign results.

Column	Description
Campaign Name	Shows the name of the MailChimp campaign that was used to email the recipient.
Group	Shows the name of the Sage CRM group that was used in the MailChimp campaign.
Status	Shows if the MailChimp campaign is saved or sent.
Email Open Count	Shows how many times the recipient opened the email.
Clicked URLs	Shows how many times the recipient clicked the links in the email.
Email Bounced	Shows if the email has hard or soft bounced. For more information, see Soft vs Hard Bounces.
Unsubscribed	Shows if the recipient has unsubscribed from the campaign.

Checking if a Person or Company record was sent to MailChimp or Swiftpage

1. Open the Person or Company record you want to check.

   > **Tip:** You can quickly search for the record you want to open. For details, see Using Quick Find.

2. On the **Summary** tab, see the value of the **This record was sent to** option.

   Possible values:

   - **<blank>** Indicates that the record hasn't been sent to MailChimp or Swiftpage.
   - **MailChimp**
   - **Swiftpage**
   - **MailChimp and Swiftpage**

> **Note:** To completely remove the personal data of a person or lead from Sage CRM, you need to manually delete that data from the linked MailChimp and Swiftpage accounts. For details, see the documentation provided by MailChimp and Swiftpage.

MailChimp error messages

There are several reasons why a MailChimp operation can't be performed. The table below explains the causes and solutions for the most common errors.

Cause	Example UI message	Solution
Group error	**Error message:** The group was not sent to MailChimp. Remove all bounced and unsubscribed email addresses from the group and resend it.	Ask your system administrator to synchronize MailChimp and Sage CRM. Remove all bounced and unsubscribed email addresses from the group and resend it.
Syncing error	**Error message:** There was an error while retrieving data from MailChimp.	The campaign or segment details have been changed on the MailChimp website rather than in Sage CRM and this has caused syncing issues between MailChimp and Sage CRM. Log on to the MailChimp website, note the current campaign and segment name, and update the campaign and segment name in Sage CRM to match them.
Upload to MailChimp list error	**Notification:** 0 email addresses added | 5 email addresses updated | 2 errors.	The notification displays the number of contacts with new or updated email addresses that were successfully sent to MailChimp, and the number of contacts that MailChimp couldn't process. Ensure each contact in the group has a valid email address and hasn't unsubscribed from your campaign. The **Opt out of E-Marketing** checkbox on a Company, Lead, or Person record indicates whether the record has unsubscribed from a MailChimp campaign. If necessary, remove unsubscribed contacts from the group and then click **Send to MailChimp**. Unprocessed contacts are counted as errors and included in an error group. You can click the error count in the notification to open the group and correct the contact details.
Mailchimp name error	**Error message:** There was an error performing the operation.	The campaign wasn't created because you added special characters such as a backslash or quotation mark at the start of the campaign name. Remove any special characters from the start of the name and click **Create Campaign**.

Cause	Example UI message	Solution
MailChimp segment name error	**Notification:** The Segment (Group) called: <segmentname> already exists in MailChimp.	When you're uploading several segments to MailChimp in succession, you must wait a minute between uploading segments to ensure the previous segment isn't overwritten.
Mailchimp Campaign not sent	**Error message:** Campaign: <campaignname> cannot be sent by MailChimp.	You can't send campaign emails because you've exceeded the number of emails allowed on your plan. There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you go over this number of emails or subscribers, an error message appears when you try to send a campaign. If you have too many subscribers, you can delete contacts from the MailChimp list. For more information, see Delete a Group in MailChimp Knowledge Base. Alternatively, contact your system administrator to upgrade to a paid plan. For more information, see MailChimp Pricing.

Groups

- About groups
- Creating a group
- Managing a group
- Performing actions on a group

About groups

A group is a defined set of records that belong to the same type of entity. You can create a group of person, company, lead, case, opportunity, quote, order, or custom entity records based on filter criteria. These criteria can be simple or complex. For example, *All IT managers in Dublin* or *All marketing managers in the telecoms sector in London, Dublin, or Manchester, who attended our seminar last year, but who have not yet replied to our invitation mail shot*.

A group can be static or dynamic:

- A **static group** stores the query that generated the group and a snapshot of the records that matched the query criteria when you saved the group. Static groups are useful because they create a list of records that you can manage. You can manually exclude records from the group or add new records to the group by rerunning the query or manually adding records.

  > **Tip:** If a record in a static group has been deleted since the group was created, a message is displayed the next time you open the group stating that the group contains deleted records.

- A **dynamic group** stores only the query that generates the group contents. Each time you open a dynamic group, the query runs and the group contents are refreshed. A dynamic group is like a report as it always returns up-to-date information about records that currently match the criteria. If a record changes and no longer meets the group criteria, it is no longer included in the group. Similarly, if a record changes and meets the criteria, it is added to the group. You cannot manually exclude records from the group or add new records to the group. Instead, you must change the query. Dynamic groups are used as the data source for list gadgets on the interactive dashboard.

How to use groups

Task	Help
Create a group of records that have a common criteria.	Creating a group
You can export group information to a CSV or text file for use in other applications.	Exporting group information
You use groups to • perform a mail merge • create a task for all members of the group • send mass emails • add contacts to a MailChimp list	Performing a mail merge Creating a group task Sending a mass email to a group Adding contacts to a MailChimp list
When you've performed actions on a group, you can refresh the group to ensure it's up to date.	Group action buttons
You can add records to a static group.	Adding records to a group from the group details screen
You can exclude records from a static group.	Editing a group
A group contains links to each person or company associated with a record in the group. If you click a person or company link, the person or company information is displayed in a read-only pop up window. If you want to open the Person Summary screen or the Company Summary screen and edit this information or drill down further, you can do one of the following: • Create a dashboard list gadget using the group as the data source. This works for dynamic groups only. You can use the gadget filter to search for records in the group. • Create and save an Advanced Find instead of a dynamic group. You can perform actions such as a mail merge on the matching records. When you click a record link, the record summary screen opens and you can edit the information or drill down further.	Adding a new gadget to a dashboard List gadget Using Advanced Find Creating and updating a saved search Performing actions on search lists

Creating a group

- Creating a group from the Groups tab
- Creating a group from the Wave Activity tab

- Creating a group based on search results

Note: You can create a group when you perform a data upload. For more information, see *Settings for companies and people* and *Settings for leads* in the System Administrator Help.

Creating a group from the Groups tab

When you create a group from the **Groups** tab, you can choose the view on which the group is based, add search criteria or an Advanced Find, and specify the fields included in the group output. You must have access rights to view the **Groups** tab.

1. Click **My CRM | Groups**.
2. Click **New Group**.
3. Complete the Group fields and click **Continue** to move through the screens.
4. If you've added search criteria to the group, specify your search criteria and click **Continue**.

   Tip: If E-marketing is enabled and you also want to send mass emails to groups, you should add **Person:Opt out of E-marketing communication** to the group search criteria and set it to **Not Checked** to ensure that people who've opted out of E-marketing emails don't receive any marketing emails that you send by mass email. For more information, see Sending a mass email to a group.
5. If you're creating a static group:
   - Click **Save empty static group** to save the group query but not the list of records returned by the query. Use this to build a group of individually selected records that do not have a convenient common set of criteria. For more information, see Adding a record to a group from the record summary screen.
   - Click **Save** to save the group query and the list of records returned by the group.
6. If you're creating a dynamic group, click **Save**.

Creating a group based on search results

You can create a group based on the results of a search on a primary entity or an Advanced Find search.

1. On the top bar, click the **Search arrow** and click **<Entity>** or **Advanced Find**.
2. Enter your search criteria and click **Find**. A list of matching records is returned.
3. Click **Create New Group**.
4. Complete the Group fields.
5. Click **Save**.

Group fields

Field	Description
Name	Name of the group
Description	Description of the group and search criteria.
Type	A static or dynamic group. For more information, see About groups.
Available to	The type of user who can access the group. If you're an info manager with Groups access, you can make a group available to other info managers. This also allows system administrators and info managers access key attribute data for the group. For more information, see *Groups* in the System Administrator Help. If you're a system administrator, you can make a group available to all users.
Entity	The entity on which the group is based. All records within a group must be based on the same primary entity.
Source view	The view on which the group is based.
Select column	All available columns that can be used in the group.
Group content	Columns that are included in the group contents.
Search criteria	Columns that are included in the search criteria for the group.
Sort on	The column on which the group contents are sorted. If there are multiple columns, the group is sorted first by the column at the top of the list and then by the next column.
Advanced Find	Creates an advanced find query to generate the group. For more information, see Using Advanced Find.

Managing a group

- Adding a record to a group from the record summary screen
- Adding records to a group from the group details screen
- Editing a group

Adding a record to a group from the record summary screen

You can add a person, company, case, opportunity, or lead record to a static group from the record's summary screen.

> **Note:** You can add a company with no people to a group. However, the group cannot appear in an Outbound Call list.

1. On the top bar, click the **Search arrow** and click **<Entity>**.
2. Find the record you want to add to the group.
3. Click the record link to open the record summary screen.
4. Click **Add to Group**.
5. Select the group from **Select Group**.
6. Click **Save**.

Adding records to a group from the group details screen

You must have access rights to any record that you want to add to a static group. You cannot add duplicate records to a destination group.

1. Click **My CRM | Groups**.
2. Click the link for the group to which you want to add records.
3. Click **Add Records to the Group**.
4. To find additional records using a simple search, do the following:
    a. Select **Add Records via Find / Saved Search** and click **Continue**.
    b. Enter search criteria or select a saved search.
    c. Click **Find** and then click **Add to group**.
5. To find additional records using a complex search, do the following
    a. Select **Add Records via Advanced Find** and click **Continue**.
    b. Create an advanced find or select a saved advanced find.
    c. Click **Find** and then click **Add to group**.
6. To add records from an existing group that's based on the same entity as the current group, do the following:
    a. Select **Add Another Groups Records**.
    b. Select the group and click **Save**.
    c. Click **Close**.
7. Click **Continue** to return to the **Group Details** screen.

Editing a group

You can edit certain fields in static and dynamic groups. When you open a group record, it is locked for other users. This means only one user can edit a group at any one time.

1. Click **My CRM | Groups**.
2. Click the link of the group that you want to edit.
3. Click **Change**.
4. You can update **Name**, **Description**, and **Available To**. For more information, see Group fields.
5. Click **Continue** to move through the editable group attributes and search criteria.
6. Make all necessary changes and click **Save**.
7. To exclude specific records from a static group, select **Exclude**.
    - To exclude all records from a static group, click **Exclude All**.
    - To include all records in a static group, click **Include All**. For more information, see Group action buttons.

Performing actions on a group

1. Click **My CRM | Groups**.
2. Click the link of the group on which you want to perform an action.
3. Click the relevant **Action** button. For more information, see Group action buttons.

Group action buttons

This table describes the action buttons displayed on the **Group Details** screen.

Button	Description
Merge to Word	Merges a standard template with the address and contact details of recipients in the group to create a Word document. Your system administrator must enable **Merge to Word**. For more information, see Performing a mail merge.
Merge to PDF	Merges a standard template with the address and contact details of recipients in the group to create a PDF document. For more information, see Performing a mail merge.
New Task	Creates a task against each recipient in the group. For more information, see Creating a group task.

Button	Description
New Email	Sends an email to each recipient in the group. For more information, see Sending a mass email to a group.
New Consent Email	Allows you to automatically create and update consent records for all persons or leads in the group by sending a consent email. For more information, see Sending a consent email to a group.
Export to File	Exports the group as a CSV or text file. For more information, see Exporting group information.
New E-marketing Email	Sends an E-marketing email to each recipient in the group. For more information, see Sending E-marketing emails to a group.
Include All	Toggles all members of the group to be included in the group. Available for static groups only.
Exclude All	Toggles all members of the group to be excluded from the group. Available for static groups only.
Refresh	Refreshes the group to include all records which have been added since the creation of the group and meet the search criteria. A static group stores the query that generated the group and the list of returned records. If you want a list of up-to-date records that match the query, you must manually refresh the group. If you perform an action on a static or dynamic group, you can refresh the group to ensure it's still up to date.
Exclude Previous Recipients	If the group has already been used for an action, this excludes the people, companies, or leads who were the targets of that action. For example, perform this action if you emailed the group last week, refreshed it today, and now want to email the new members only. Available for static groups only.
Mass Update	Updates all records in the group at once. This button is displayed to system administrators only. For more information, see *Performing mass update* in the System Administrator Help.
Update Territory	Updates territories for a group. This button is displayed to system administrators only. For more information, see *Updating group territories* in the System Administrator Help.
SQL	Displays a new window containing the current SQL used to generate the group. This button is displayed to system administrators only. If you have SQL experience, you can customize the SQL.

Creating a group task

1. Click **My CRM | Groups**.
2. Click the link of the group for which you want to create the task and click **New task**.

3. Enter values in the Task fields.
4. Select **Internal Actions** in **Parent Category Selection** to create a child category when the task is performed. You can use the category to generate reports and to create a new group for follow-up actions. For more information, see *Groups* in the System Administrator Help.
5. Click **Save**. The task record is displayed in the calendar of the person who created the task and contains a link to each person or company in the group. The task also appears on the **Communications** tab of every group member.

Sending a mass email to a group

To send a mass email to a group, the group must be linked to a person, company, or lead.

1. Click **My CRM | Groups**.
2. Click the link of the group you want to email and click **New Email**.
3. To ensure the email isn't sent to members of another group, select the other group from **Dedupe against other Group**.
4. Complete the Email options.
5. Specify Communication options. This panel is not available if you're using Email Management to handle outbound emails.
6. Select **Email** in **Parent Category Selection** to create a child category when the email is sent. You can use the category to generate reports and to create a new group for follow-up actions. For more information, see *Groups* in the System Administrator Help.
7. To preview the email, click **Send Yourself Test**.
8. To send the email to the group, click **Send Email** and click **OK**.
9. To view the status of the job, click **Marketing | Mass Email Status**. For more information, see Viewing the status of a mass email.
10. When the email is sent, a communication record is displayed in the calendar of the person who created the communication. It contains a link to each person or company in the group. The communication also appears on the **Communications** tab of every group member. To view a sent email, click the **Email** icon beside the communication link.
    - To convert the email to an opportunity, lead, or case, click **New Opportunity**, **New Lead**, or **New Case**. For more information, see Converting emails.
    - To register a response to an email that's linked to a wave activity, select the response from **Response Type** and click **Save**.

Viewing the status of a mass email

1. Click **Marketing | Mass Email Status**.
2. To temporarily stop the mailer, click **Stop** from the **Actions** column and then click **OK**. The current mailer details remain in the status list until the job is resumed and the email has been sent to everyone in the group. The emails remain unsent with a **Pending** status even if they were set to a **Complete** status in the **Communication Options** panel.
    - To view details of the communication, click the link in the subject column.
    - To view a list of people to whom the email was successfully sent, click **Click here to view recipients of the mass email**. To close the window, click **OK**.
    - To return to the **Email Status** screen, click **Continue**.
3. To restart the mailer, click **Resume**. When all emails have been sent successfully, the status bar displays the following message: *There are no pending mass Emails*.
    - Any problems that are encountered when sending the email are included in the status list and you can troubleshoot the problem.
    - Emails are saved as communications against the person and company to which they were sent, and the team and territory specified in Communication options according to the status you selected.

Sending a consent email to a group

You can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For more information about consent records, see Recording consent that you may send marketing materials.

1. Create or open a group containing Person or Lead records.
2. Click **New Consent Email**.
3. Under **Consent details**, complete the consent fields. For more information, see Consent fields.
4. Under **E-mail Options**, from **Template**, select the **Person Consent Email** or **Lead Consent Email** template.
5. Edit the email body if necessary.

    By default, the email body includes two hyperlinks containing the following variables:

    - `%CRMSubmitConsentLink%` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Consented**.
    - `%CRMSubmitConsentLink%&status=1` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Withdrawn**.

    When you send a consent email to a group, the variables are transformed into URLs unique to each recipient.

> **Warning:** Do not delete these hyperlinks or change the variables, because they are used to update the status of the corresponding consent records in Sage CRM.

6. Complete the remaining email fields. For details, see Sending a mass email to a group.
7. To send the email to the group, click **Send Email** and click **OK**.

   When you send a consent email to a group, Sage CRM automatically creates a consent record for each Person or Lead record in that group. Sage CRM automatically updates the consent record status based on what link each recipient clicks in the consent email.

Sending E-marketing emails to a group

Sage E-marketing must be enabled by your system administrator before you can send an E-marketing email to a group.

1. Click **My CRM | Groups**.
2. Click the link of the group you want to email and click **New E-marketing Email**.
3. Assign the E-marketing activity to a campaign and wave. For more information, see Setting up an E-marketing campaign and Creating an E-marketing email.
4. Click **Save**.
5. Complete the E-marketing email fields.
6. Click **Save & Send**.

Exporting group information

> **Note:** Exporting group information exports only the columns listed for the group members on the Groups screen. It does export all available information for the group member records.

1. Click **My CRM | Groups**.
2. Click the link of the group you want to export and click **Export to File**.
3. Select **CSV** or **Text**.
4. Select **Create entry in shared documents** to make the file available to all users.
5. Click **Save**.
6. Complete the fields in the Details panel and the Scheduling panel.
7. Select **External Actions** in **Parent Category Selection** to create a child category when the group is exported. You can use the category to generate reports and to create a new group for follow-up actions. For more information, see *Groups* in the System Administrator Help.

8. Click **Save**.
    - The task record is displayed in the calendar of the person who exported the group and contains a link to each person or company in the group. The task record also appears on the **Communications** tab of every group member.
    - If you selected **Create entry in shared documents**, click **My CRM | Shared Documents** to view a list of exported groups. Click the **Attach** icon beside a group link to view the exported file.

Working with key attribute profiling data

These steps explain you add and edit Key Attribute Profiling data.

1. Select the tab that contains a Key Attribute Category Group. For example, a new tab called Training Profile, within the context of a person.
2. Highlight the category to which you want to add data and click **Add Category**. The selected category and its associated fields are displayed for editing.
3. Add the data and click **Save**. The data is displayed in read-only mode.
4. To edit data in an existing category, click **Change**.
5. To add data into a new category, click **New**.

If the category was selected as a Multiple Instance Data category, you can select the category more than once. The value in the first field of the category is used as a label on the category to differentiate between multiple selections of the same category.

Customer service

- Cases
- Solutions

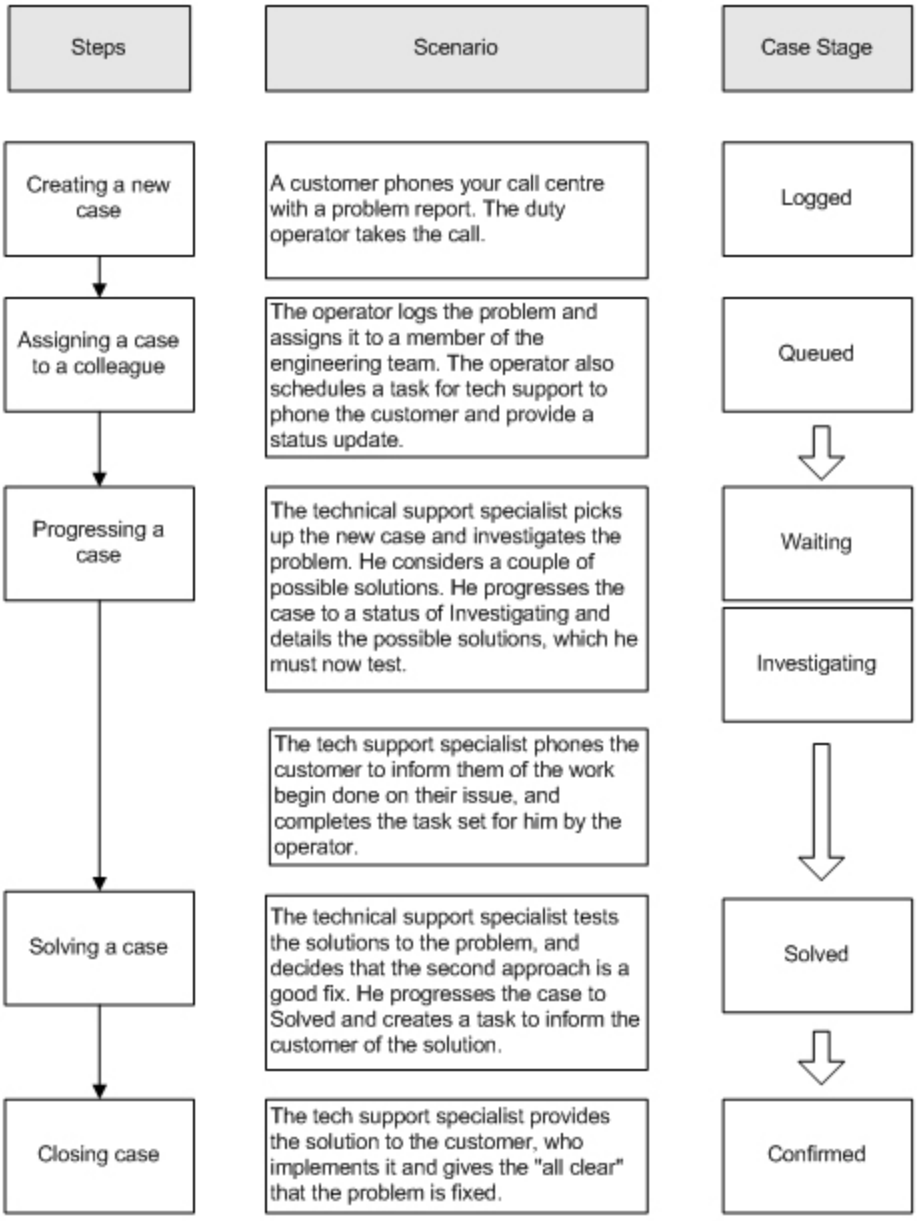
Cases

- What is a case?
- Creating a new case
- Assigning a case to a colleague
- Progressing a case
- Solving a case
- Closing a case
- Adding a solution to the solutions knowledge base
- Manually progressing cases
- Viewing the cases pipeline
- Running a case report
- Determining which cases you're working on
- Deleting a case

What is a case?

In Sage CRM, a case is a customer service issue.

You can capture a customer query in Sage CRM, and track the progress of the problem through to a solution and closure.



Creating a new case

To raise a customer service issue:

1. Open a Person record.
2. Click their company.
3. Click the **Cases** tab, and click **New Case**.
   Alternatively, in the top right corner of the product window, click **New | New Case**.

4. Add as much information as you know at this stage to the case fields. For more information, see Case fields.
5. Click **Save**. Your case has successfully been created.
6. Click **Continue**. The case is displayed in the list of cases on the **Cases** tab.

Case fields

Field	Description
Company	Company that the case is with.
Person	Main contact person for the case.
RefId	Automatically generated reference Id for the case. Made up of [User Number] - [Automatic Counter].
Found In	Which version of the product the problem was found in.
SLA	Service Level Agreement. If None is selected, the service level agreement linked to the Company is used as the default to calculate target response and resolution times.
SLA Severity	Service Level Agreement Severity. Also used to calculate target response and resolution times. For example, Customers on the Gold SLA, should have a response to all High SLA Severity Cases within 30 minutes.
Description	Short description of the problem.
Area	Area of the product affected by the problem.
Source	How the problem came to you. For example, Phone, Email, Fax.
Customer Ref	Customer's own reference identifier.
Product	Which product the customer has a problem with.
Fix In	Product version that a fix is due to be supplied in.
Territory	Security territory. For more information, see Territory management.
Created By	Person the case is logged by.
Severity	Severity of the case. For example, Normal, Low, High.
Assigned To	Person currently responsible for the case.
Stage	Stage of the case. For example, Logged, Queued, Investigating.
Status	Status of the case. For example, In Progress, Closed.

Field	Description
Problem Type	Type of problem. For example, Customer knowledge, Missing component.
Problem Details	Detailed description of problem.

When you save the Case, the following additional fields are displayed in read-only format. They are available for editing on the Progress Case screen at the relevant point in the customer service workflow process.

Field	Description
Team	Team responsible for the case.
Solution Type	Type of solution. For example, Replace component, On-Site Engineer.
Solution Details	Detailed description of solution.
Closed	Date the case is closed.

This table explains the Case Status icons.

Status Icon	Description
	In Progress
	Closed

This table explains the SLA Status icons.

SLA Status icon	Description
	The check mark icon indicates that the Case is within the target close time specified in the SLA.
	The minus sign icon indicates that the Case has reached the warning percent level, set by the system administrator, without being closed. For example, if the SLA specifies that Medium SLA Severity cases should be closed within 30 hours, and the Warning Percent has been set to 80%, then the yellow minus sign icon is displayed next to all Medium SLA Severity cases if the case is still open after 24 hours.
	The cross icon indicates that the Case has breached the SLA.

Assigning a case to a colleague

If your system has Case Workflow enabled, a number of actions are available under **Actions**. The actions available to you may vary depending on how the case workflow has been set up and customized to suit your customer service process.

To assign a case to a colleague using workflow:

1. From within the context of a logged case, click the **Queue** workflow bullet. The Progress Case page is displayed.
2. Assign the case to a user using the **Assigned To** field.
3. Add a tracking note providing additional information.
4. Click **Save**.
5. Your workflow may be set up to automatically create a follow-up call for your colleague. If not, click **New | New Task** on the Top Bar. The Enter New Communication page is displayed. The task is automatically linked to the case in the **Relating To** field.
6. Complete the communication details, and click **Save**. The new communication is displayed on the **Communications** tab within the context of the case. The **Tracking** tab contains details of the case's progress. The case and the follow-up call are in the My CRM area of the engineer assigned to work on the case.

Progressing a case

The tech support specialist assigned to a case can access the case and the follow-up call from their My CRM area. They may have even received an on-screen notification or email regarding the case.

To make the follow-up call and progress the case:

1. Click the **My CRM | Cases** tab. A list of all cases assigned to the current user is displayed.
2. Click the case **Status** icon. The Summary page of the case is displayed.
3. Select the **Investigating** workflow bullet. The Progress Case page is displayed.
4. Add a tracking note, and click **Save**. The Case Summary page is displayed.

All changes can be viewed from the **Case Tracking** tab. The tech support specialist can now complete the task set by his colleague to call the customer back. He can confirm the current status and continue working on a resolution.

The **Duration** column in the **Case Tracking** tab shows how long the case has spent at each stage in the resolution process. The duration takes into account the business calendar linked to the SLA. These are defined by the system administrator.

Solving a case

Once a tech support specialist is satisfied with a solution, a case can be progressed to the next stage of Solved. This time, when the case is progressed, the **Solution Type** and **Solution Details** should be completed.

Closing a case

The customer confirms that the solution fixes the problem and the case can be closed.

- The case is progressed through the workflow states of **Pass** and **Regression Pass**. The Case stage is automatically set to **Confirmed**, and the Case status to **Closed**.
- The closed date should automatically be filled in.
- The case is now closed, and moves out of the tech support specialist's **Cases** list, but it remains as an integral part of the customer history for future reference.

Adding a solution to the solutions knowledge base

Solutions to cases can be reused for similar queries from customers in the future.

Your workflow may be set up to automatically create and publish a new solution based on the one you've found for the case you just solved. If not, you can manually create a new solution, and link it to an existing case and to future cases that may require the same resolution.

Manually progressing cases

The case workflow functionality automates the progression of cases to follow predefined business processes. If your system administrator turns the case workflow off, the workflow actions on the cases summary screen are replaced with a **Progress** button. This button allows you to manually change details of the case on the Progress Case screen. Your changes are recorded on the **Tracking** tab.

Viewing the cases pipeline

- To view a graphical representation of **In Progress** cases assigned to you, click the **My CRM | Cases** tab.
  - The pipeline shows the number of cases at each stage.
  - Cases are summarized in a list below the pipeline.
- To filter the list of cases to display only cases at a particular stage, click a pipeline segment. The **Stage** field is also updated.
- To view more details about a particular case, click the case link in the list.
- To toggle back to the full list of cases, click the highlighted segment in the pipeline.
- To hide the pipeline, click **My CRM | Preferences** and set **Show Cases Pipeline** to **No**.

Running a case report

Case Summary reports provide a quick overview of a particular customer service issue.

1. Find and open the case you want to generate the report for.
2. From the Case Summary page, click **Summary Report**. The report is displayed in PDF format.

Determining which cases you're working on

To find out which cases you're currently working on from within My CRM, click the **Cases** tab. The list of cases currently assigned to you is displayed. If the list is long and difficult to work with, you can filter it using the filter box on the right-hand side of the screen.

Deleting a case

If your security profile allows you to delete cases, a **Delete** button appears on the Case summary page in edit mode. If you need to delete cases but can't access this button, contact your system administrator.

1. Find and open the case you want to delete. For more information, see Using Find screens.
2. From the Case Summary page, click **Change**.
3. Click **Delete**, then **Confirm Delete** to delete the case. The case record is deleted from the system.

Solutions

- What is a solution?
- Viewing solutions
- Adding a new solution
- Adding a new solution from a case
- Publishing a solution
- Deleting a solution
- Linking a solution to a case
- Emailing a solution

What is a solution?

> **Note:** The account you use must have rights to access solutions.

Solutions are the cleaned and approved basis of a knowledge base. Solutions can be entered manually or published from a solved case using workflow. They can be searched for using key words from a Case screen, or from a self service Web page, so that customers or partners can find answers to their questions without having to call a telephone support hotline.

Solutions are not linked to companies or people, however they can be linked to multiple cases, and a case can be linked to multiple solutions.

Viewing solutions

> **Note:** The account you use must have rights to access solutions.

There are several ways to view solutions.

- Open a Case record and click the **Solutions** tab.
- On the top bar, click the **Search arrow** and click **Solution**.
- If you're a frequent user of solutions, you may find it convenient to view the list of all solutions currently assigned to you from the **My CRM** area:

a. Click **<My Profile> | Preferences**.
b. Click **Change**.
c. Set **Show Solutions In My CRM** to **Yes**.
d. Click **Save**.

Adding a new solution

1. Click **New | New Solution**.
2. Enter details in the solutions fields. For more information, see Solution fields
3. Click **Save**. The Summary page for the new solution is displayed.

From within the context of a Solution, you can do the following:

- Click **New Email** to send an email relating to the contents of the Solution.
- Click the workflow buttons to change the state of the Solution.
- You can link communications and documents (via the **Documents** tab) to a Solution. You can also use the **Cases** tab within the context of a Solution to link to existing Cases. Alternatively, you can create a Case, then link one or more solutions to it.

Solution fields

Field	Description
Reference Id	Automatically generated reference Id for the solution. Made up of [User Number] - [Automatic Counter].
Area	Area of product or service affected.
Description	Short description of the solution.
Details	Longer description of the solution.
Team	Team responsible for the solution.
Stage	Solution Stage. For example, Draft, Rejected, Reviewed.
Status	Solution Status. For example, Not Published, Published.
Assigned To	Person responsible for the solution.

Adding a new solution from a case

While you're working on a case, or once it is solved, you can add and track possible and actual solutions from the Solutions tab.

1. Open the Case so that the Case Summary page is displayed.
2. Click the **Solutions** tab. A list of linked solutions is displayed. From the **Solutions** tab within the Case you can:
    - Create a new solution, which is automatically linked to the current Case.
    - Link to an existing solution or solutions.
    - Delete a link to an existing solution.
3. To link to an existing solution, click **Link Solution**. The **Solutions** panel is displayed.
4. To find an existing solution, you can use the Advanced Search Select feature by typing a key word directly into the **Link Solution** field and clicking the **first magnifying glass** icon. This displays a list of matches below the **Link Solution** field. You can also use the % wildcard to turn the search into a "contains" search. Alternatively, click the second magnifying glass icon and the standard Search Select page is displayed in a new window.
5. Click the solution you want to link to this case.
6. Click **Save**. The linked solution is displayed in the list of Solutions.

Publishing a solution

Customers can be given rights to view and search through all published solutions from your external Web site.

Suppose Arthur Browne from Design Right is an existing customer contact with a valid support contract. Arthur should be able to view and search through all published solutions from your external Web site. You can work through this example if your system administrator has installed the Self Service demonstration Web site. Remember to enable Arthur for self-service from the Person Self Service tab.

To publish a solution to an external Self Service Web site:

1. Open the solution so that the Solution Summary page is displayed.
2. Click the **Approve** workflow button. The Progress Solution page is displayed.
3. You can add a tracking note to explain how the Solution was reviewed, and click **Save**.
4. Click the **Publish** workflow button.
5. You can add a tracking note, and click **Save**. The Solution Summary page is displayed, where the **Stage** is set to **Reviewed** and the **Status** is set to **Published**.

Once published, a customer or partner with a self-service logon ID can search for and view the solution.

Deleting a solution

If your security profile allows you to delete solutions, a **Delete** button appears on the Solution summary page in edit mode. If you need to delete solutions but can't access this button, contact your system administrator.

1. Open the solution so that the Solution Summary page is displayed.
2. Click **Change**.
3. Click **Delete**, then click **Confirm Delete**.

Linking a solution to a case

1. Open the solution so that the Solution Summary page is displayed.
2. Click the **Cases** tab and click **Link Case**.
3. Find the Case you want to using the search select icons.
4. Once the case is displayed in the **Link Case** field, click **Save**.

Emailing a solution

1. Open the solution so that the Solution Summary page is displayed.
2. Click **Send Email**. The solution details are included in the email body.
3. Complete the rest of the email details, including the recipient and click **Send** to send the email to the customer.

Reports

- Standard reports
- Running a report
- Saving report search criteria
- Exporting a list report
- Grouping favorite reports
- Interacting with report charts

Standard reports

There are three types of standard report:

- **List** reports create rows and columns of information based on selected criteria. For example, **Company list by segment** displays a list of companies in selected industry segments, such as all companies in the computer - software segment.
- **Cross tabular** reports create a record count across an X and Y axis based on selected criteria. For example, **Activities logged report by user** shows the number and type of communications logged by specified users. The search criteria includes the **Date/Time** field from the communication. This report includes a chart graphic.
- **Historical** reports provide a static view of a record at previous points in time. For example, **Opportunity closing history** shows opportunities that were opened during a specified time period. You can add other search criteria.
- **Summary** reports show a quick overview of account information. They're available from the **Summary** tab of companies, people, opportunities, and cases. For example, **Person summary** creates a one-page report with key information about a person including their contact details and a summary of the most recent interactions the person has had with your business.

Note: If you've appropriate permissions you can also generate report output from any search list, saved search, or group. For more information, see Exporting a list report.

A standard installation includes sample reports in the following categories:

- Activity
- Campaigns
- Communications
- Customer Service
- General
- Lead
- Marketing
- Sales
- Outbound Calls
- Administrator
- Dashboard

Running a report

1. Click **Reports | <Report Category>**.
2. Click **<Report Name>** or click **Run** beside the report name. To use a saved search, select the search beside **<Report Name>** and click **Run**. For more information, see Saving report search criteria.
3. Change the display option if necessary.
    - **Screen** opens the report in a pop-up window.
    - **Export to PDF** displays the report in Adobe PDF format. You can choose the page size and orientation. Report charts are displayed as static images in PDF files.
    - **Export to XLSX** displays the data in XLSX format. Report charts are also displayed.
    - **Export to Excel CSV** displays the report in Excel CSV format. This option renders well in Excel if your local settings support tab delimitation. The data in Excel CSV is always tab delimited and padded with ="", regardless of local settings. For example:
      ```
      ="June Website Offer Lead" [TAB] ="Accantia Ltd." [TAB] ="Thomas Beesley" [TAB] "Lead"
      ```
    - **Export to CSV** displays the report in Comma Separated Values (CSV) format. The data is delimited according to the CSV File Export Delimiter set at system and user level. If you open the file in MS Excel, it may not be formatted correctly. You can open it in Notepad and use the **CSV Excel** option, or open in MS Excel and convert the formatting. For example, using the **Text To Columns** option.

> **Warning:** If you intend to open the report in Microsoft Excel or OpenOffice Calc, don't use the **Export to CSV** option, because these applications may automatically run embedded formulas in the data. We recommend that you use **Export to XLSX** or **Export to Excel CSV** in this case.

4. Select criteria for the report. If you leave the search criteria blank, the results return all permitted values. To select multiple criteria, press the **Ctrl** key and click the individual entries.
5. Click **Go**.

> **Note:** Your system administrator defines the navigation buttons that are displayed for an onscreen report.

Saving report search criteria

If you regularly run reports using the same search criteria, you can save and reuse the criteria.

1. Click **Reports | <Report Category>**.
2. Click **<Report Name>**.
3. Select display options and search criteria.
4. Click **Save**.
5. Enter a name for the saved search.
6. Select **Available to All Users** to make the saved search available to all users.
7. Click **Save**. When you return to the list of reports, the saved search criteria is displayed in a list beside the report.
    - To edit a saved search, select it from the **Saved Search** column, click **Run**, make the changes you require and click **Save**.
    - To delete a saved search, select it from the **Saved Search** column, click **Run** and click **Delete**.

Exporting a list report

If your system administrator has given you rights, you can quickly create a list report in CSV or text file format from any search list, saved search, or group.

1. On the top bar, click the **Search arrow** and **Company** and search for particular companies. For example, all London based companies in the system that are assigned to you.
2. Click **Export to File**.
3. Enter a file name.
4. Select the output format.
5. To make the list report available to all users, select **Create entry in shared documents**.
6. Click **Save**.

Grouping favorite reports

You can add reports that you work with regularly to the **My Favorite Reports** category:

1. Click **Reports | <Report Category>**.
2. Select **Favorite** beside the report you want to add to the **My Favorite Reports** category.

Interacting with report charts

A report can include a chart that displays data graphically, provides built-in animation, and lets you interact with the data. For example, the bars of a horizontal bar chart grow as the chart is drawn, or you can click slices of a pie chart to highlight them.

You can rotate a pie or doughnut chart to get a better view of the data: click and drag the chart to its new position.

> **Note:** Chart gadgets on the dashboard also include charts.

Dashboards

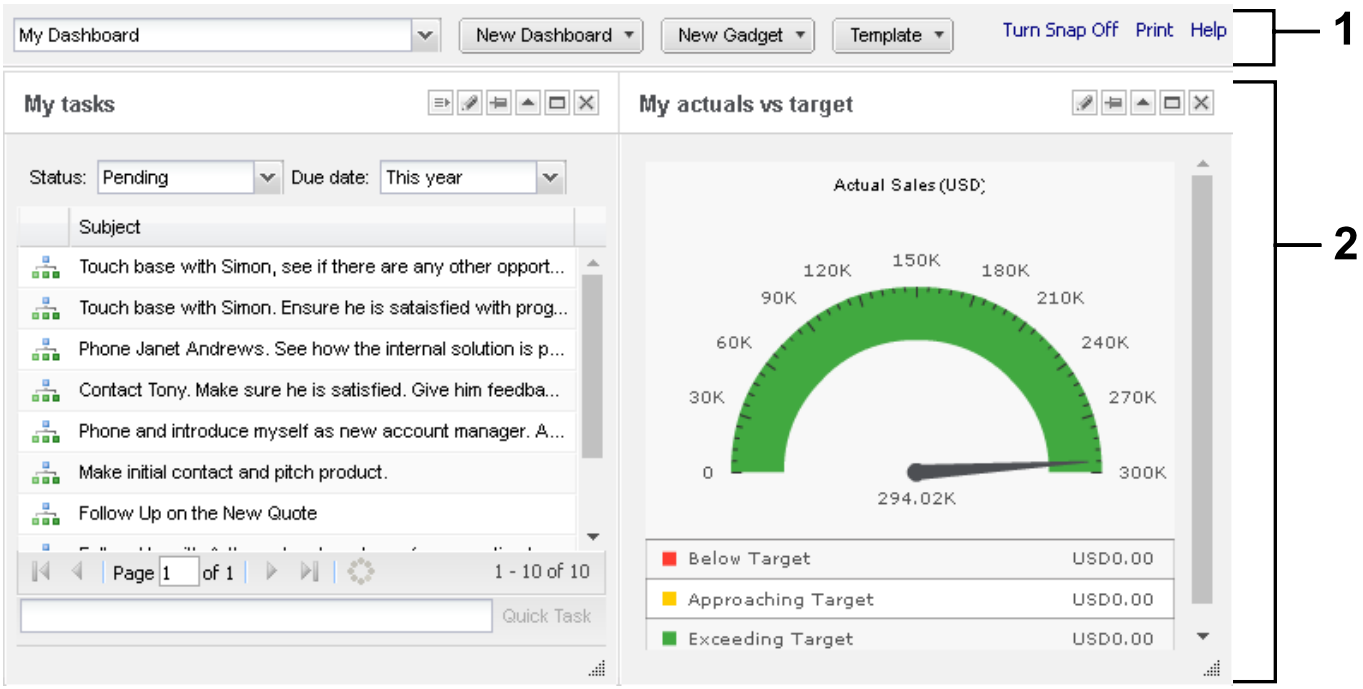
- Interactive dashboard
- Classic dashboard

Interactive dashboard

- About the interactive dashboard
- Accessing the interactive dashboard
- Getting started with the interactive dashboard
- Selecting a dashboard
- Setting a default dashboard
- Creating a dashboard from a template
- Management dashboards
- Copying a dashboard
- Creating a new dashboard
- Modifying dashboard details
- Deleting a dashboard
- Setting up an interactive company dashboard
- Gadgets
- Templates

About the interactive dashboard

The interactive dashboard is a highly-customizable workspace where you control what information you need to see to be effective in your job. Create multiple dashboards and gadgets by choosing the feeds, workflow, and actions you want to drive from your workspace, or select predefined gadgets and dashboards from templates. Choose feeds from Sage CRM, the Web or ERP systems using SData. Watch one gadget change as you scroll through another, and drag and drop your gadgets to create the layout you want.



Element	Description
1 (control bar)	Control bar lets you choose from the list of available dashboards, or create your own gadgets, dashboards and templates. You can also turn snap on or off (snap-to-grid for flexible dashboard layout), access help, and switch to the classic dashboard page. The classic dashboard is a legacy feature that's available for upgrade customers only.
2 (gadgets)	Gadgets feed information from multiple data sources, internal and external to Sage CRM, into your workspace. You can perform tasks and actions from some of them, such as logging a new case or progressing a sales opportunity through a workflow. You can edit a gadget's properties from the gadget's header. You can drag and drop gadgets, resize and overlap them. You can also drag and drop columns within gadgets to create the best workspace for your type of job and style of working.

Accessing the interactive dashboard

To access the interactive dashboard, click the **My CRM | Dashboard** tab. A welcome dashboard is displayed.

The next time you access the **Dashboard** tab within the same user session, the interactive dashboard is displayed, showing the last dashboard you were viewing.

The next time you access the **Dashboard** tab in a new user session, one of the following is displayed:

- Your default dashboard, if you have one.
- If no default has been set, the most recently modified dashboard.
- If you have no personal dashboards, a dashboard which has been assigned to you by an Info Manager or system administrator.
- If you have multiple dashboards assigned to you, the most recently modified dashboard is displayed.
- If you have no personal or assigned dashboards, then the default welcome dashboard is displayed.

Getting started with the interactive dashboard

This example assumes your system includes either the standard Sage CRM demo data, or at least one dashboard template and one gadget template set up by an Info Manager or system administrator.

1. Click **New Dashboard | Choose Template**.
2. Highlight one of the dashboards in the list of templates.
3. Click **OK**.
4. Give the dashboard a name, and click **OK**.
5. Click **New Gadget | Choose Template** to add more predefined gadgets.
6. Click the **edit pencil** icon on the gadget's header to modify an existing gadget, or create your own custom gadget from **New Gadget | Create Gadget**.
7. To set your new dashboard as your default dashboard, select the Dashboard drop-down arrow, then click **Dashboard Options**. Highlight the dashboard you want to set as the default, click **Set Default**, and then **OK**.

Selecting a dashboard

1. Click the **My CRM | Dashboard** tab and click the dashboard drop-down arrow. A list of dashboards is displayed.
2. Select the dashboard you want to display.

Once the dashboard is displayed:

- If the dashboard selected has been created by someone else who has given you access to it, the Status bar displays the message: "Dashboard Template – you must be an Info Manager or Administrator to edit and save".
- If you still want to modify the dashboard, click **Create a copy**. You can modify the copy as much as you need.

Setting a default dashboard

1. Click the **My CRM | Dashboard** tab.
2. Click the Dashboard drop-down arrow, and click **Dashboard Options**. If a default dashboard has already been set, a check mark icon is displayed next to the current default dashboard.
3. To narrow down the list of Dashboards, use the **Filter by** text box.
   This works on a "Begins with" basis. For example, type "a" and you get a list of dashboards and categories beginning with the letter "a".
   You can also modify your category names from this dialog. Highlight the category and click **Modify Category**.
   A category containing dashboards cannot be deleted. The **No Category** category can only be modified by the system administrator via **<My Profile> | Administration | Translations**.
4. Highlight the dashboard you want to set as your default, and click **Set Default**. A check mark icon is displayed next to the dashboard to show that the default dashboard is set. You can close the dialog with the close (**x**) icon, or select and open the default dashboard by clicking **OK**.
5. Click **OK**. The default dashboard is displayed on your workspace. It is also displayed as the first dashboard after your next logon, even if you have been working with other dashboards during your last user session.

To clear a default dashboard, highlight the default dashboard and click **Clear Default**.

Creating a dashboard from a template

1. Click **Dashboard | New Dashboard | Choose Template**. The dashboards are grouped alphabetically by category, and then alphabetically by dashboard within each category.
2. Use the **Filter by** field to narrow the list of dashboards.
   This field works on a "Begins with" basis. For example, type "a" and you get a list of dashboards and categories beginning with the letter "a".
   You can also modify your category names from this dialog box. Highlight the category and click **Modify Category**.
3. Highlight the dashboard you want to display on your workspace, and click **OK**. The **Dashboard Details** dialog is displayed.
4. If you're a system administrator, you can access ready-to-use Management dashboards. For more information, see Management dashboards.
5. Give the dashboard a name. You can also select a new category.
6. Click **OK**. The new dashboard is displayed on your workspace with the updated name and can be modified to suit your needs. t

To make the ready-to-use management dashboards available to other users, you must assign the users to the management dashboard templates. For more information, see Assigning users to a dashboard template.

Management dashboards

> **Note:** To view Management dashboards and make them available to other users, the account you use must have System Administrator rights.

There are two ready-to-use Management dashboards. Each dashboard includes configurable gadgets that use Sage CRM data from across your organization.

Dashboard	Description
Sales KPI for Managers	Displays key performance indicators to help you identify and measure your organization's successful activities. This dashboard includes the following gadgets: • **Monthly Sales Trends**. Compares the value of sales won this year with the value of sales won last year. It also shows the number of opportunities that were won this year. • **Actual vs Target**. Shows the opportunity revenue that's been won as a percentage of forecasted sales. • **Pipeline**. Shows information about all currently open opportunities grouped by stage. • **Open Activities**. Displays information about calendar entries for a specific period such as demos, letters to be sent, and meetings. • **At Risk Customers**. Shows customers and leads who haven't been contacted in over 90 days, or customers and leads in a company that's greater than 90 days old who've never been contacted. These customers are considered at risk of leaving your company. • **Won Deals Leaderboard**. Displays the number of opportunities that each sales rep has won.

Dashboard	Description
Sales Metrics for Managers	Displays information to help you measure progress towards your organization's goals. This dashboard includes the following gadgets: • **Leads Generated by Source**. Shows the number of leads in your system according to how they were sourced. • **Deals Lost to Competitors**. Displays deals that your organization was bidding on but lost to a competitor. The report is based on the **Competitor**, **Winner**, and **Reason for Loss** fields in each opportunity record. • **Won vs Lost Deals**. Shows opportunities that each sales rep has won and lost in a specified period of time. • **Average Deal Close Rate**. Displays the amount of time between a new opportunity being created and closed. The information is grouped by sales rep. • **Cross-sell Deals**. Shows the number of cross-sell opportunities created during a specific time period by each sales rep. A cross-sell opportunity is one that's created when another opportunity closes. For example, if you sell a computer, a cross-sell opportunity could be to sell a maintenance plan for the computer. • **Top Open Deals**. Displays the number of current opportunities that are in progress and greater than a specified value. The information is grouped by company. **Tip:** To include an opportunity in the Monthly Sales Trends, Actual vs target, Won Deals Leaderboard, Deals Lost to Competitors, and Won vs Lost Deals reports, the date in **Closed** on the opportunity record must be within the relevant time period. For more information, see Opportunity fields.

Copying a dashboard

You can copy a dashboard by either clicking **Create A Copy** from a dashboard template, or clicking **Copy** within the Dashboard Options dialog.

To copy a dashboard from Dashboard Options:

1. Click **Dashboard Options** from the dashboard drop-down.
2. Highlight the dashboard you want to copy.

3. Click **Copy**.
4. Click **Modify** to change the Name, Description, and Category of the copy, and **Save**.
5. Click **OK** to select the copied dashboard and make changes to the gadgets on it.

To create a copy of a dashboard template:

1. Make sure the dashboard you want to copy is displayed on your workspace.
2. Click **Create a copy**. The Dashboard Details dialog box is displayed. The default naming convention for the copied dashboard is **Copy of** <copied dashboard name>.
3. Update the **Name**, **Description** and **Category** of the new dashboard.
   The layout type (Fixed or Flexible) automatically copies the layout type from the source dashboard and cannot be changed.
4. Click **OK**. The copied dashboard is displayed on your workspace. It is also available from your list of personal dashboards via the dashboard drop-down list.

An Info Manager or system administrator can clone dashboard templates and user dashboards from Dashboard Templates. For more information, see Working with dashboard templates.

Creating a new dashboard

1. Click **My CRM | Dashboard | New Dashboard | Create Dashboard**.
   The **Dashboard Details** dialog box opens.
2. Set the layout type:
   - **Fixed**. Gives you a three-column layout. You can drag and drop and rearrange gadgets within a fixed format, extend the length of gadgets, and maximize them. If you regularly switch between different screen resolutions during your day, it is recommended you work with a Fixed layout.
   - **Flexible**. Lets you design your dashboard layout. Gadgets can overlap, be arranged diagonally down your screen, and expanded width-ways.

   Once selected, and the dashboard is on your workspace, you cannot change the layout type.
3. Enter the name, description and category for the dashboard. The dashboard name is a required field. The category can be selected from the drop-down list, or you can create a new one by typing in the **Category** field.
4. Click **OK**.
   The **Gadget Template** dialog box opens.
5. Select the check boxes next to the gadget templates you want to display on your dashboard.
   If you don't want to display any of the gadget templates, close the dialog box. The next step is skipped.
   You can go back and add gadget templates later by clicking **New Gadget | Choose Template** or by adding new gadgets from **New Gadget | Create Gadget**.
6. Click **OK**. The new dashboard is displayed on your workspace with the gadgets you selected.

Modifying dashboard details

1. Click **Dashboard Options** from the Dashboard drop-down.
2. Highlight the dashboard you want to modify, and click **Modify**.
3. Update the **Name**, **Description**, and **Category**.
4. Click **Save**.
5. Click **OK**.

The updated dashboard is displayed on your workspace. The details of Assigned and Template Dashboards can only be modified by Info Managers or system administrators. This can be done from **Templates | Dashboard Templates**, then follow the steps described above.

Deleting a dashboard

1. Make sure the dashboard you want to delete is not displayed on your workspace.
2. Click **My CRM | Dashboard, and click Dashboard Options** from the Dashboard drop-down.
3. Highlight the dashboard you want to delete, and click **Delete**.

Template and assigned dashboards can only be deleted by a system administrator or Info Manager. This can be done from **Template | Dashboard Templates**.

Setting up an interactive company dashboard

Sage CRM provides a standard company interactive dashboard template, which is assigned to all users, and can be modified by Info Managers. It works in the same way as the **My CRM | Dashboard**, but filters gadget content to match the company context. For more information about the interactive dashboard, see About the interactive dashboard

Company dashboards are only available from the Dashboard tab of a Company record.

You can create one or more of your own personalized Company dashboards, and then switch between them to access different levels of company detail. Once you select a Company dashboard, the same dashboard is displayed to you in the Dashboard tab of all companies, until you change it again.

1. Make sure you're in the context of a company, and click the **Dashboard** tab.
2. If you use classic dashboards, switch to the interactive dashboard by clicking the interactive dashboard link if you need to.
3. Click **New Dashboard | Create Dashboard** and add the gadgets you want. For more information,

see Gadget quick reference.

4. Set as your default dashboard by clicking **Dashboard Options** from the dashboard drop-down.

Changes to the Company dashboard don't affect the dashboards available from **My CRM | Dashboard**.

Gadgets

- Adding a gadget template to a dashboard
- Adding a new gadget to a dashboard
- Gadget quick reference
- Editing gadget content
- Linking gadgets
- Modifying gadgets
- Adding new data sources for gadgets

Adding a gadget template to a dashboard

Gadget templates are predefined by a system administrator or Info Manager. A user can select a gadget template and add it to their dashboard. Once the gadget is on your dashboard, you can customize it to suit your needs.

1. Make sure the dashboard you want to add the gadget template to is displayed on your workspace.
2. Click **New Gadget | Choose Template**.
   The **Gadget Template** dialog box opens, showing a list of all gadget templates grouped by gadget type.
3. Select the check box next to the gadget template that you want to display on your dashboard.
4. Click **OK**. The gadgets are displayed on your dashboard.

Adding a new gadget to a dashboard

1. Make sure the dashboard you want to add the new gadget to is displayed on your workspace.
2. Click **New Gadget | Create Gadget**.
   Follow the steps in the wizard that opens.
3. Select the type of gadget you want to add. For more information, see Gadget quick reference.
4. Complete the wizard. The new gadget is displayed on your dashboard.

Gadget quick reference

Gadget	Description
Calendar gadget	Drill into appointments, add quick appointments, scroll through your calendar, and filter by appointment status. **Note:** Quick appointments cannot be added on the Company dashboard tab.
Chart gadget	Display a report chart, drill into the associated report search criteria, run the full report, and use built-in animation.
List gadget	View, filter, and carry out actions on lists. Can be linked to other list and record summary gadgets for dynamic filtering.
Main menu item gadget	Add multiple Sage CRM or web site icons to a single gadget. Sage CRM actions include main menu actions such as Find Quote and New Lead.
Notification gadget	View and drill into notification alerts, dismiss or snooze individual or all notifications.
Record summary gadget	View a Sage CRM record's summary page. Must be linked to a list gadget to display data.
RSS feed gadget	Displays an RSS feed. User name and password details can be preset for feeds requiring authentication.
SData list gadget	Work with records from SData-compliant ERP systems or from a Sage CRM SData feed. Can be linked to SData List or SData Record Summary gadgets for dynamic filtering.
SData record summary gadget	View an SData record's summary page. Must be linked to an SData list gadget to display data.
Summary gadget	Link to multiple lists from a single gadget. Lists can be displayed as icons, summary lists, or a pipeline graphic (for single lists).
Task list gadget	Drill into tasks, add a new quick task, filter by task status, and switch between daily, weekly, and monthly task lists. **Note:** Quick tasks cannot be added on the Company dashboard tab.

Gadget	Description
Website Gadget	Type or paste in a web site address, or select a content block set up by the system administrator. **Note:** Not all web sites are compatible with this gadget, for example, web sites which do not allow themselves to be embedded in other pages. An error message is displayed once the gadget is on the dashboard. The Web Site gadget can display a static URL. To define a static URL in the Web Site gadget, the URL must begin with the text *#crm_server#*. The actual HTML files must be placed in a folder off the **WWWRoot** folder. For more information, see Website Gadget. This format can also be used to link to third-party gadgets. For more information, see the *Developer Help* in the Sage CRM Help Center.

Calendar gadget

To add a new calendar gadget to a dashboard:

1. Click **Calendar** from the Gadget Wizard.
2. Add a name and description for the gadget.
3. Click **Finish**.

Once the Calendar gadget is on your dashboard you can:

- Drill into an appointment by clicking the **Action** icon.
- Add a new quick appointment.
  Quick appointments cannot be added on the Company dashboard tab.
- Scroll through your calendar.
- Filter by appointment status. You can have multiple calendar gadgets on your dashboard. For example, you might want one calendar which shows only pending appointments, and another which shows all appointments.

Chart gadget

To add a new chart gadget:

1. Click **Chart** from the Gadget Wizard. A list of reports with charts is displayed.
2. Select the chart or report title from the list of report charts.
   Use the **Filter by** field to narrow the list of charts. **Filter by** works on a "Begins with" basis.
3. Click **Next**.
4. Select a **Default Action**.
   Go To List Or Report displays an **Action** icon in the gadget header when the gadget is on the

dashboard. When you click the **Action** icon, the report's Display Options and Search Criteria page opens.

> **Note:** Cross-tabular and historical reports are not supported as sources for chart gadgets.

5. Select a **Drill Down** action.
   Run Report adds a link to the report chart, which runs the full report. Default search criteria are applied to the report if they exist.
   To use the animation directly from the chart on the dashboard, ensure **Default Action** is set to **None** - otherwise the full report is displayed. You can also access the animation from the full report.
6. Click **Next**.
7. Add a name and description for the gadget.
8. Click **Finish**.

Built-in animation means that you can watch charts grow as they are formed. You can also interact with charts once they are drawn. For example, highlighting slices and rotating pie charts. For more information on working with charts, see Running a report.

Some charts are displayed differently when you view your dashboard on iPad; a pyramid changes to a doughnut, and a funnel changes to a bar chart.

List gadget

1. Click **List** from the Gadget Wizard. A list of entities is displayed.
2. Select an entity to base your gadget on and click **Next**. A list of data sources, grouped by type (Group, Report, Saved Advanced Find, Saved Search) is displayed.
3. Use **Filter by** to narrow the list; the filter works on a "Begins with" basis.
4. Select the data source to base your gadget on and click **Next**. A list gadget can use dynamic groups, report definitions, saved searches, and Advanced Find definitions.
5. Select the columns to display or select **Select All**.
6. To change the number of records to display per gadget page from the default (10), enter a value in **No. Of Rows**, and click **Next**.
7. Select a **Default Action**.
   Go to List or Report displays an **Action** icon ( ) in the gadget header when the gadget is on the dashboard. Click the icon to drill into the report search criteria page (for report data sources) or associated list of a saved search, advanced find, or group data sources.

   > **Note:** Cross-tabular and historical reports are not supported as sources for list gadgets.

8. Select a **Drill Down** action to add a column displaying an icon beside each record in the gadget. Click the icon to launch the action.

- **Go To Summary Screen**. Opens the summary screen of the selected record.
- **LinkedIn Search**. Searches in LinkedIn using the **Person Last Name** and/or **Company Name** field values in Sage CRM. The user must have a LinkedIn account, and will be prompted to logon the first time they use the action.
- **New Appointment**. Creates an appointment, using the context details of the selected record.
- **New Task**. Creates a task, using the context details of the selected record.
- **New Email**. Creates an email, using the context details of the selected record.

9. Select **Display Workflow Anchor Column**, if it's available, to add an Action column to the gadget. When you click the icon in the **Action** column, the workflow actions relating to the current record can be launched.
10. Click **Next**.
11. Add a **Name** and **Description** for the gadget, and click **Finish**.

Once the List gadget is on your dashboard you can use the **Filter by** drop-down list and field to narrow the selection further. The **Filter by** field returns data containing the text entered. You can filter by any string (character) type of field, which is displayed on the gadget. You cannot filter by numeric or date/time fields.

Main menu item gadget

To add a new main menu item gadget:

1. Click **Main Menu Item** from the Gadget Wizard.
2. Select one of the following opitons from the left-hand drop-down field:
   - **CRM**. Provides access to the next field as a drop-down list containing main menu items. Click the main menu item and add a name for the link.
   - **URL**. Type the web address (use the format *http://www.domain.com* or *https://www.domain.com*) and a name for the link.
3. Click **Next**.
4. Add a name and description for the gadget.
5. Click **Finish**.

Notification gadget

To add a new notification gadget to a dashboard:

1. Click **Notification** from the Gadget Wizard.
2. Add a name and description for the gadget.
3. Click **Finish**.

Once the Notification gadget is on your dashboard you can:

- Drill into an appointment by clicking the appointment details.
- Dismiss or snooze individual or all notifications.

Record summary gadget

To add a new record summary gadget:

1. Click **Record Summary** from the Gadget Wizard. A list of entities is displayed.
2. Click an entity to base your gadget on from the list.
3. Click **Next**. A list of record summary blocks is displayed.
4. Click a block to base your gadget on.
5. Click **Next**.
6. Add a name and description for the gadget.
7. Click **Finish**.

The record summary gadget displays content when it is linked to a list gadget. For more information, see Linking gadgets.

RSS feed gadget

To add a new RSS feed gadget:

1. Click **RSS Feed** from the Gadget Wizard.
2. Type or paste the Web Address for the feed. Use the format *http://www.domain.com* or *https://www.domain.com*.
3. Select the **Authentication** check box to specify the user name and password for a feed requiring authentication. Setting the authentication on the gadget prevents the user from being prompted for logon details each time the secure feed is accessed.
4. Click **Next**.
5. Add a name and description for the gadget.
6. Click **Finish**.

SData list gadget

To add a new SData list gadget:

1. Click **SData List** from the Gadget Wizard.
2. Select one of the following:
    - **Sage CRM SData feed**. Creates a gadget based on data from Sage CRM's internal SData feed.

- **Pre-configured SData feed**. Creates a gadget based on an existing SData feed to surface data from an SData-compliant ERP system. The pre-configured SData feed is set up by an Administrator or Info Manager in **Template | SData Feed Templates**.
- **Custom SData feed**. Creates a gadget based on an SData schema URL, which you type in yourself. Type a valid SData schema URL to get information about the data sources available from the provider in the **Web Address** field.
    - A valid SData schema URL takes the format:
      http(s)://<ServerFQDN>:<PortNumber>/sdata/<Application>/<Contract>/<Resource>/$schema

      Where <ServerFQDN> is the fully qualified domain name of the Sage CRM server, for example **server.mydomain.com**.
      For more information on constructing custom SData feeds, see the *Developer Help* in the Sage CRM Help Center.
    - Set up the user name and password for a feed requiring authentication. Setting the authentication on the gadget prevents the user from being prompted for logon details each time the secure feed is accessed.
    - After the gadget has been saved, feeds added in the Custom section will be available as pre-configured feeds to the user who added the feed.

3. Click **Next**.
4. Click an entity to base your gadget on from the list. The list of entities displayed is defined in the SData Schema.
5. Click **Next**.
6. Select the check box next to the columns you want to display on the gadget, or click **Select All**. The columns within each entity are defined in the SData Schema.
7. Click **Next**.
8. In Step 4 of the wizard, click **Include/Exclude**, the field to filter on, the operator, and the value to filter by.
   For example, *Include Invoices where Status Is Equal To Overdue*.
    - The operators available change depending on the field type selected. Enter the value as a drop-down selection or free text. The format of some fields, for example dates, depends on how the data is supplied in the feed.
    - If the full field name from the feed is too long to display in field drop-down, an ellipsis (**...**) is displayed in the middle of the field. Hovering over the field name shows the full name.
    - A maximum of five filter rules can be added to a gadget. All filters are combined using an **AND**operator. This means that an SData gadget with multiple filters returns data, which meets all the filter criteria. For example, *Include Invoices where Status Is Equal To Overdue AND Include Invoices where Payment Terms Is Equal To 30 days*.
9. Click **Next**.
10. Add a name and description for the gadget.
11. Click **Finish**.

Once the SData List gadget is on your dashboard you can:

- Drill into and edit the data using the **drill-down** icon in the left-hand column. The record details are displayed in the SData Navigator.
- Use the **Filter by** drop-down list and field to narrow the selection further. The **Filter by** field returns data containing the text entered. You can filter by any string (character) type of field, which is displayed on the gadget. You cannot filter by numeric or date/time fields.
- Link the gadget to another SData List gadget or to an SData Record Summary gadget.

Working with the SData navigator

The SData navigator parses all the fields and corresponding data of the selected SData gadget row, and displays this data in the right-hand property table. The title of the property table is the entity fields of the entity **<SData gadget row entity name>**.

The SData navigator also parses all the related entity links of this row in the SData gadget, for example, phone numbers related to an account.

SData record summary gadget

To add a new record summary gadget:

1. Click **SData Record Summary** from the Gadget Wizard.
2. Select from Sage CRM SData feed, Pre-configured SData feed, or Custom SData feed. For more information, see SData list gadget.
3. Click **Next**.
4. Click an entity to base your gadget on from the list.
5. Click **Next**.
6. Click the check box next to the columns you want to display on the gadget, or click **Select All**. The columns within each entity are defined in the SData Schema.
7. Click **Next**.
8. Add a name and description for the gadget.
9. Click **Finish**.

The SData record summary gadget displays content when it is linked to an SData list gadget. For more information, see Linking gadgets.

Summary gadget

1. Click **Summary** from the Gadget Wizard. A list of data sources is displayed.
2. Use the **left** and **right** arrow buttons to select the data sources for your gadget. Use the **Filter by** field to narrow the available data sources list. The **Filter by** field works on a "begins with" basis.

3. Click **Next**. If you only selected one data source, then Step 2 of the gadget displays a **Group by** drop-down field.
4. Select the display options for the gadget. For a multiple data sources, select **Icons View** or **List View**. For a single data source you can also select **Pipeline View**.
5. Click **Next**.
6. If you only selected one data source, select the **Drill Down** option from the drop-down field. **Go To List Or Report** displays an **Action** icon in the gadget header once the gadget is on the dashboard. Clicking on the **Action** icon ( ) drills into either the report search criteria page (for report data sources) or to the associated list of a saved search, advanced find, or group data sources.
   If you selected multiple data sources you can drill down by clicking the summary list or icon once the gadget is on the dashboard. The drill down from the summary list or icon is either into the report search criteria page (for report data sources) or to the associated list of a saved search, advanced find, or group data sources.
7. Click **Next**.
8. Add a **Name** and **Description** for the gadget.
9. Click **Finish**.

Task list gadget

To add a new task list gadget to the dashboard:

1. Click the **My CRM | Dashboard** tab.
2. Click **Modify Dashboard | Add New Gadget**.
3. Select the **Task List** gadget.
4. Add a name and description for the gadget.
5. Click **Finish**.

Once the Task List gadget is on your dashboard you can:

- Drill into a task by clicking the Communication Action icon.
- Add a new quick task.
  Quick appointments cannot be added on the Company dashboard tab.
- Filter by today, this week, this month, and this year.
- Filter by task status.
- Customize the column layout by dragging and dropping or clicking the drop-down arrow next to the column heading.
- Link the gadget to other task list, list, or record summary gadgets. For more information, see Linking gadgets.

Website Gadget

To add a new website gadget:

1. Click **Web Site** from the Gadget Wizard.
2. Type or paste the web address. Use the format *http(s)://www.website.com*.
   Alternatively, select a content block, which has been predefined by the system administrator.
   Not all web sites are compatible with this gadget, for example, web sites which do not allow themselves to be embedded in other pages. An error message is displayed once the gadget is on the dashboard.
3. Click **Next**.
4. Add a name and description for the gadget.
5. Click **Finish**.

The Web Site gadget can display a static URL. To define a static URL in the Web Site gadget, the URL must begin with the text *#crm_server#*. The actual HTML files must be placed in a folder off the **WWWRoot** folder. A system administrator with access to this folder can help you do this.

Example	Description
#crm_ server#/StaticContent/abcd.html	Relates to a file named **abcd.html** in a folder created off the **WWWRoot** folder called **StaticContent**. This format can also be used to link to third-party gadgets. For more information, see the *Developer Help* in the Sage CRM Help Center.
#crm_ server#/StaticContent/#language#/ ecosystem/CommunityLinks.htm	Relates to a folder created off the **WWWRoot** folder called **StaticContent**, which contains an optional placeholder that picks up the language of the user.

Editing gadget content

To edit a gadget which is already on a dashboard:

1. Click the **Edit** icon in the gadget header. The first step of the gadget wizard for the current gadget is opened.
2. Make the changes to gadget.
3. Click **Finish**. The updated gadget is displayed on the dashboard.

Linking gadgets

Available on List, Task List, Record Summary, SData, and Third-party (added via the Web Site gadget) gadgets. List and Task List gadgets can be linked to each other or to Record Summary gadgets for dynamic filtering. SData gadgets can be linked to each other. Third-party gadgets can be linked to each other, or to List and Record Summary gadgets.

List, SData, and third-party gadgets can send or receive data from other gadgets. In other words, they can set the filter or be filtered by other gadgets. Record summary gadgets can only be receivers. A gadget can have many concurrent links with other dashboard gadgets.

Before linking an SData gadget, please note the following:

- An advanced (system administrator) level of understanding of the SData feed source (i.e. Sage CRM or ERP system) is required to set up some links between SData gadgets. For example, while the SData schema may make the fields available to set up a link between two columns such as "opportunity priority" and " case priority", it will not result in data filtering from one gadget to another.
- Likewise, care must be taken when linking gadgets via ID fields. For example, if you're trying to filter a person list by company, then linking an SData company list gadget to an SData person list gadget using **comp_companyid** and **pers_channelid** will not work. This is because there is no real correlation between an identifier (ID) of a Company and the ID of the Channel (team), which a Person record is associated to. Such a link therefore does not make sense. Using **comp_companyid** and **pers_companyid** will work.

To link a gadget:

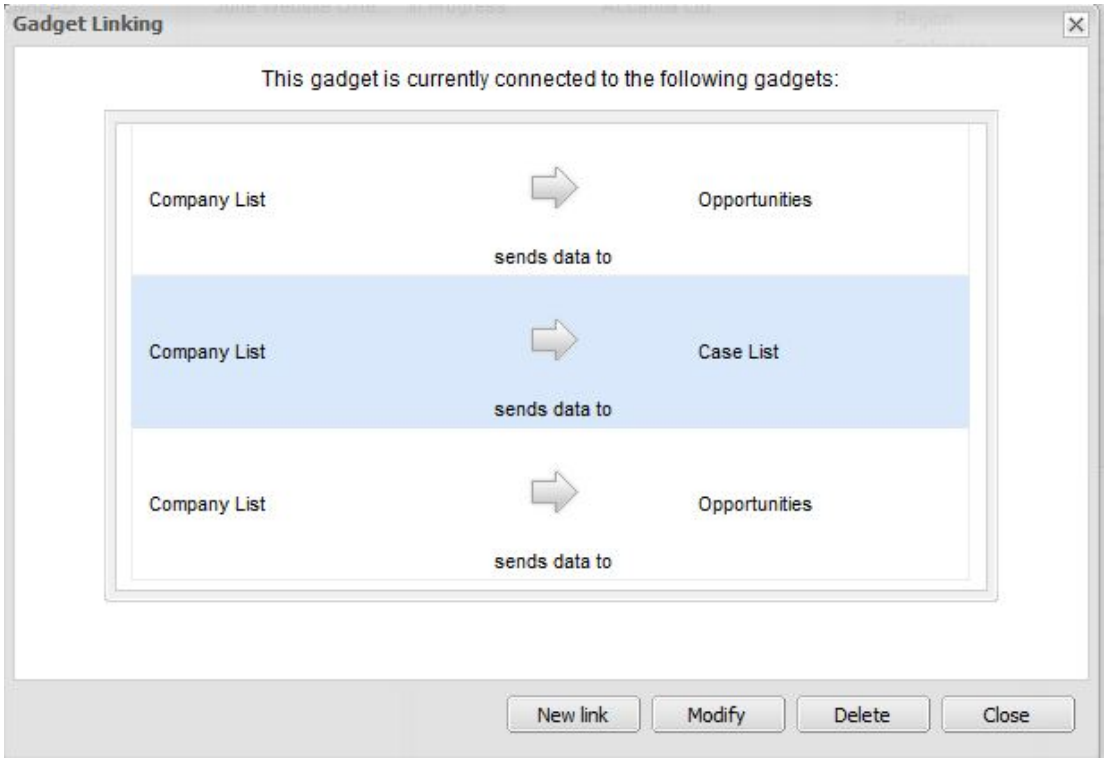
1. Click the dashboard you want to link gadgets on.
2. Make sure you have at least two gadgets on your dashboard. For example, a list gadget based on a company data source, and a list gadget based on an opportunity data source.
3. Click the **Links** icon on any one of the gadgets that you want to link, for example, the company list gadget. The Gadget Linking dialog box is displayed.
4. Click **New Link**. The top half of the Link information dialog shows the gadgets you want to link. The gadget where you selected the Links icon from is already selected. For example, the company list.
5. Set the drop-down to either **Sends Data To** or **Receives Data From**.
   Record Summary gadgets can only "receive data from" other gadgets. For this example, select **Sends Data To**.
6. Click the gadget to link to from the right-hand drop-down. For example, the opportunity list.
7. In the lower half of the dialog, the left-hand list shows all the fields from the first gadget that you can link. For example, **Company (Company ID)**.
8. The right-hand list shows the fields from the gadget on the right-hand side of the dialog that you can link, based on the selection already made. For example, **Company (Company)**.
9. Click **OK**. Click **Close** to exit the Gadget Linking dialog. The opportunities list gadget is filtered as you click through the company list gadget. The gadget header changes to show the current filter. To edit the current links on a gadget, click the **Links** icon in the gadget header.

Example 1: Sending data from a single gadget to multiple gadgets

This example illustrates how to set up links and send data from a Company List gadget to Case List, Opportunity List, and Company Record Summary gadgets.

In this example, the Company List gadget is the sender, and the other gadgets are the receivers. This relationship should not be confused with parent and child record relationships. An opportunity list could just

as easily be the sender and a company list a receiver. Scrolling on the opportunity list would then filter the company list.

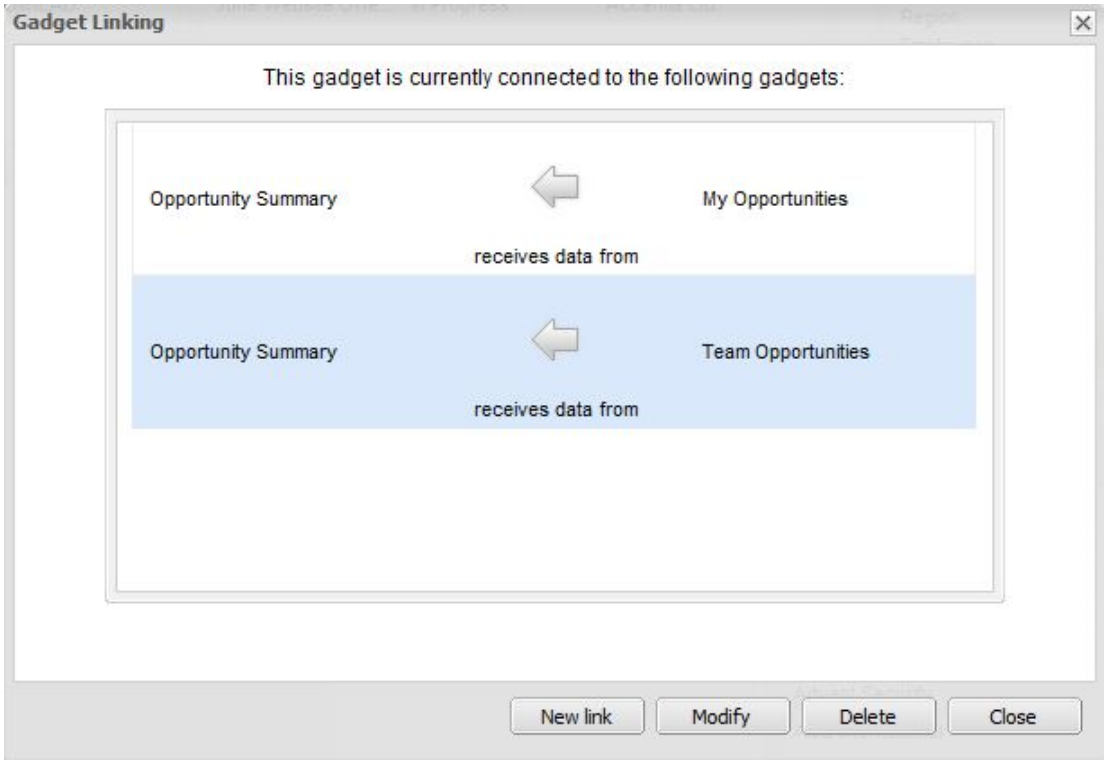


When the user scrolls through the list of companies, the opportunity and case list gadgets, and the company summary gadget are all filtered by the selected company.

Example 2: Sending data from two gadgets to a single gadget

This example illustrates how to send data from two different Opportunity List gadgets to one Opportunity Summary gadget. Links can be set up from an opportunity summary gadget (Opportunity Summary), to an opportunity list gadget for an individual user (My Opportunities), and to an opportunity list gadget for a team (Team Opportunities).

In this example, both opportunity list gadgets are senders, and the summary gadget is the receiver. This can save you space on your dashboard, as you can easily toggle the view on a single receiver gadget between the two sender gadgets.

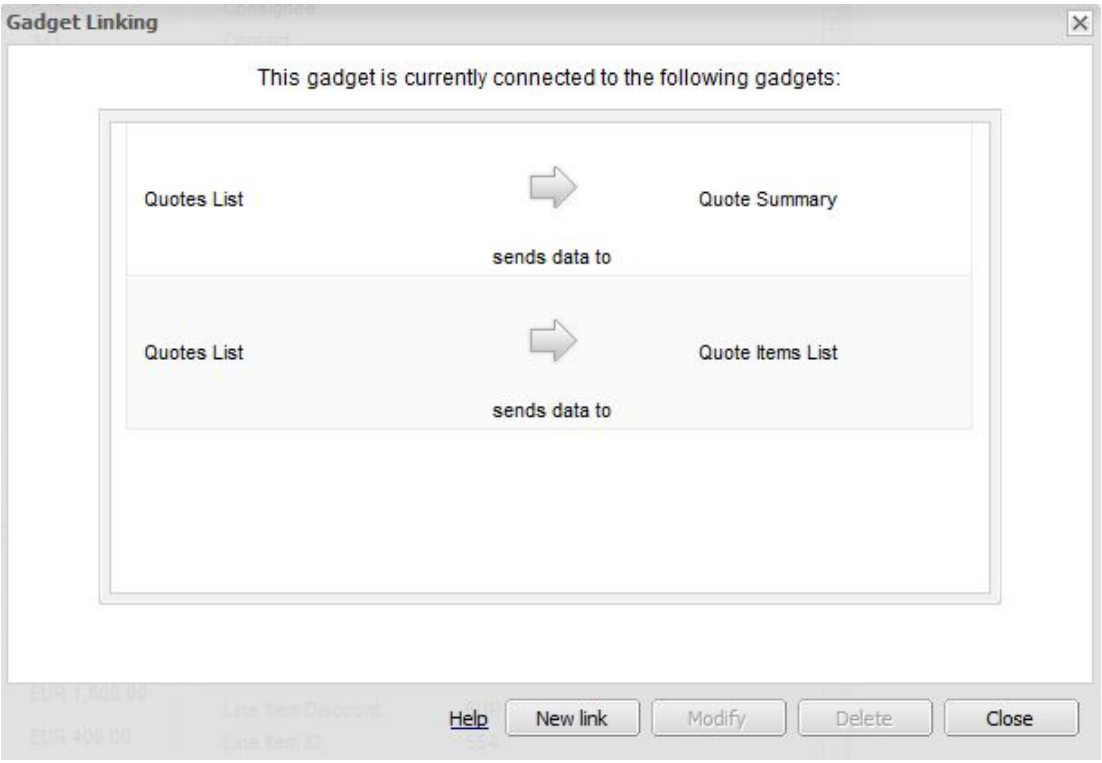


When the user scrolls through their own list of opportunities, the summary gadget shows the details of each of their own opportunities. Click over to the list of team opportunities and scroll through - the summary gadget show the details of each of the team's opportunities.

Example 3: Linking two gadgets

You can link an SData List gadget (Quotes List - using **quot_orderquotid**) to another SData List gadget (Quote Items - using **quit_orderquoteid**) , and then link each of those list gadgets to their corresponding SData Summary gadgets (Quote Summary and Quote Items Summary - again using **quot_orderquotid** and **quit_orderquoteid** respectively) .

In this example Sage CRM SData feeds are used. Links using feeds from SData-compliant ERP systems are set up in the same way - for example, a list of Accounts linking to multiple gadgets showing orders, invoices, revenue, and revenue per financial period.



When the user scrolls through the list of quotes, the quote items gadget shows the line items relating to the quote, and the quote summary gadget shows the details of the quote. Click over to the list of quote items and scroll through - the quote items summary gadget show the details of the selected line item.

Modifying gadgets

Gadgets can be modified by:

- Using the icons on the Gadget Header.
- Changing the column layout directly from the gadget (for list gadgets).
- Changing the gadget in the gadget library (Info Managers and system administrators only). For more information, see Modifying a gadget template.

The gadget header displays a number of icons.

Left to right, these are:

- **Action**. Available on List, Summary, and Chart gadgets if a Drill Down option was selected in the gadget wizard. The Drill Down option **Go To List Or Report** drills into either the report search criteria page (for gadgets using reports as the data source) or to the associated list (Search, Advanced Find, or Group) of Saved Searches, Advanced Find, or Group data sources.
- **Link**. Available on List, Task List, Record Summary, and SData List and SData Record Summary gadgets. List and Task List gadgets can be linked to each other or to Record Summary gadgets for

dynamic scrolling. SData gadgets can be linked to each other. For more information, see Linking gadgets.

- **Edit**. Opens the first step of the gadget wizard for the current gadget.
- **Enable/disable resizing and dragging**. Fixes the position and size of the gadget. Available in flexible dashboard layout only. Toggles the resize icon in the lower right-hand corner of the gadget with a pin icon. When gadgets are moved around in flexible layout you can also toggle a snap-to-grid link (**Turn Snap On/Off**) from the control bar. When this is on, gadgets resize and align to a grid to the nearest 20px.
- **Minimize**. Displays the gadget header.
- **Maximize**. Opens the gadget to size of the dashboard workspace.
- **Close**. Deletes the gadget from the dashboard. Cannot be undone.

The SData gadget header includes an additional header icon on the far left, **Select columns**.

To change the column layout on a List, Task List, or SData List gadget you can use any of the following options:

- Drag and drop the columns to the desired layout.
- Switch the sort order between ascending and descending, by clicking the current sort order column heading.
- Click the drop-down arrow next to any column heading and select **Columns**. A sub-menu of all columns available is displayed. Select the check box next to the columns you want to add or remove.
- Select the **Action** check box to display the Workflow Anchor Column.

Adding new data sources for gadgets

You can make new data sources available to you in the gadget wizard by creating new reports, groups, advanced finds, and saved searches in the normal way in Sage CRM. You can also add new data sources from SData feeds, which have been pre-defined by users with Info Manager or Administrator rights.

To find out more about these types of data sources, see the following:

- Groups
- Reports
- Using Advanced Find
- Adding an SData feed template

When working with data sources for the interactive dashboard, please note:

- The interactive dashboard does not support key attribute data. For this reason, you cannot use reports that provide key attribute data as data sources for the interactive dashboard gadgets.

- The report data sources are grouped in the interactive dashboard by the entity selected in the report source view, not the report category. Data sources from cross-tabular or historical type reports are not included in List or Chart gadget report data sources.
- Users must be given access to Enterprise Reports in **<My Profile> | Administration | Users** to be able to view data on gadgets based on Report data sources.
- For group data sources to be displayed in the dashboard the group type must be set to **Dynamic Group**.
- Take care when deleting data sources. For example, a gadget using a group data source will no longer show any data if that group is deleted.
- Private group data sources are not available when setting up template gadgets.
- You can use Advanced Find as the data source for a gadget on the Interactive Dashboard to expose data that might otherwise be difficult to access, in a format that let's you perform your business actions. For example, as a Customer Service representative, you can create an Advanced Find search to retrieve all communications that are linked to your cases. Use the clause *Communication : Communication Case ID* <> with a blank **Value** to find all not null records AND the clause *Company : Account Manger* = <*your user name*>. You can save the search and use it as a data source for a list gadget to display support issue communications that help you resolve your cases.

Templates

- Working with dashboard templates
- Adding a dashboard template
- Assigning users to a dashboard template
- Modifying a dashboard template
- Deleting a dashboard template
- Managing user dashboards
- Adding a gadget template
- Modifying a gadget template
- Deleting a gadget template
- Adding an SData feed template

Working with dashboard templates

> **Note:** The account you use must have Information Manager rights.

Dashboard Templates are accessed via **Template | Dashboard Templates**. Once in Dashboard Templates with the **Properties** tab active, you can manage all the template and user dashboards using the following fields, buttons and tabs:

Field or Button	Description
Filter by	Searches template or user dashboards and categories using a "Begins with" search.
Template	Displays a list of all template dashboards.
User	Displays a list of all user dashboards.
New	Adds a new dashboard template.
Modify Details	Changes the name, description and category of a template or user dashboard. The "No Category" category cannot be modified from the Dashboard interface, however a system administrator can modify the category name from **<My Profile> | Administration | Customization | Translations** (Caption Family **LandingPage**, Caption Code **BlankCategory**). A category containing dashboards cannot be deleted.
Clone	Copies a template or user dashboard as a template.
Delete	Deletes a template or user dashboard.
Modify Gadgets	Adds, removes, modifies gadgets on a template or user dashboard.
Assigned Users	Assigns users and teams to a template. The **Assigned Users** tab is active when you select a dashboard template.

Adding a dashboard template

Note: The account you use must have Information Manager rights.

1. Click the **My CRM \| Dashboard** tab.
2. Click **Template \| Dashboard Templates \| New**.
3. Set the type to **Flexible** (default) or **Fixed** layout. The type cannot be switched once the dashboard has been added.
4. Add a name, description, and category to the template.
5. Click **Save**.

The template dashboard is displayed in the list of templates. You can open the new template and add gadgets to it by clicking **Modify Gadgets**.

Assigning users to a dashboard template

Note: The account you use must have Information Manager rights.

1. Click **Templates | Dashboard Templates**.
2. Ensure **Template** is selected.
3. Highlight the dashboard you want to assign users to.
4. Click the **Assigned Users** tab.
5. Click the **Assign** button to populate the list of users and primary teams.
6. Use the **Filter by** field to search for users or teams. This is a "Begins with" search.
7. Select the check boxes next to the users and/or teams that you want to assign the template dashboard to.
8. Click **Assign**. A check mark icon is displayed next to each assigned user or team. Each assigned user or member of the assigned team can access the dashboard from the dashboard drop-down.

A user added to a team at a later date automatically gets access to all dashboards already assigned to their team.

Modifying a dashboard template

> **Note:** The account you use must have Information Manager rights.

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | Dashboard Templates**.
3. Ensure **Template** is selected.
4. Highlight the dashboard you want to modify.
5. Click **Modify Details** to change the name, description, or category of the dashboard.
6. Click **Modify Gadgets** to change the gadgets on the dashboard. The template dashboard is displayed with a message that changes may affect other users.

Any users assigned to the template will see the changes next time the assigned dashboard is accessed.

While you're working on new templates, you may find it useful to create a new category of dashboards called "Drafts" or similar. This makes it clear to other users that these dashboards are "work-in-progress".

Deleting a dashboard template

> **Note:** The account you use must have Information Manager rights.

1. Click **Template | Dashboard Templates**.
2. Ensure **Template** is selected.
3. Highlight the dashboard you want to delete.

4. Click **Delete**. A message is displayed asking you to check for assigned users, and informing you that this action cannot be undone.
5. Click **OK** to delete the dashboard template. The dashboard template is removed from the Dashboard Templates list and from the dashboard lists of all assigned users. If a user was in the middle of working with an assigned dashboard, they can continue to do so until they navigate away from that dashboard.

Managing user dashboards

> **Note:** The account you use must have Information Manager rights.

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | Dashboard Templates**.
3. Ensure **User** is selected. A list of all user dashboards is displayed, grouped by user.
4. Highlight the dashboard you want to view, modify, or delete.
5. Select the action to carry out on the user dashboard. For example, click **Modify Details** to change the category that the dashboard is stored under.
6. Click **Save**.

This feature can be useful if a user has added content to their dashboard which is preventing them from logging on to Sage CRM.The system administrator can delete the user dashboard (without opening it), so that the user can regain access to Sage CRM.

Adding a gadget template

> **Note:** The account you use must have Information Manager rights.

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | Gadget Templates | New**.
3. Select the type of gadget you want to add. For more information, see Gadget quick reference.
4. Complete the gadget wizard steps. The new gadget is displayed in the gadget templates list and is available for selection by users.

Modifying a gadget template

> **Note:** The account you use must have Information Manager rights.

1. Click **Template | Gadget Templates**.
2. Highlight the gadget you want to modify.
3. Click **Modify**. The first step of the gadget wizard for the current gadget is opened.
4. Make the changes to the gadget.
5. Click **Finish**. The updated gadget is displayed in the gadget templates list and is available for selection by users.

Changes to gadget templates only affect the gadget template itself, not any instances of the gadget on template, assigned, or personal dashboards.

Deleting a gadget template

> **Note:** The account you use must have Information Manager rights.

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | Gadget Templates**.
3. Highlight the gadget you want to delete.
4. Click **Delete Gadget**. A warning message is displayed informing you that this action cannot be undone.
5. Click **OK** to delete the gadget. The gadget is removed from the gadget templates and is no longer available for selection by users.

Deleting a gadget template only removes the instance of the gadget from the gadget templates list, and not any instances of the gadget on template, assigned, or personal dashboards.

Adding an SData feed template

> **Note:** The account you use must have Information Manager rights.

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | SData Feed Templates | New**.
3. Enter a short description for the feed in the **Feed Name** field.
4. Type a valid SData schema URL in the **Feed URL** field.
   A valid SData schema URL takes the format:
   http(s)://<ServerName>:<PortNumber>/sdata/<Application>/<Contract>/<Resource>/$schema
   For more information on constructing custom SData feeds, see the *Developer Help* in the Sage CRM Help Center.

5. Set up the user name and password for a feed requiring authentication. Setting the authentication on the gadget prevents the user from being prompted for logon details each time the secure feed is accessed.
6. To assign teams or users to the SData feed, click the **Assigned Users** tab.
7. Select the check boxes next to the users and/or teams that you want to assign the SData feed template to.
8. Click **Save**.

Each assigned user or member of the assigned team can access the SData feed from Step 1 of the SData gadget wizard.

Classic dashboard

- What is the classic dashboard?
- Setting up a new classic dashboard
- Changing content directly from the classic dashboard page
- Editing classic dashboard details
- Modifying classic dashboard content
- Adding saved searches to a classic dashboard
- Adding favorite reports to a classic dashboard
- Adding report charts to a classic dashboard
- Setting up a classic company dashboard
- Modifying the content of the classic company dashboard

What is the classic dashboard?

> **Note:** The classic dashboard is a legacy feature that's available for upgrade customers only.

The classic dashboard is a customizable page that contains information most relevant to your daily work. For example:

- A snapshot of companies you most often work with.
- A list of high priority cases assigned to you.
- Outstanding appointments.

- A list of recently viewed leads.
- A pie chart of opportunities by territory.

You can define:

- What information you want on your page based on a predefined list of content.
- A preference for displaying the Dashboard tab as the first page you see after logging on.
- More than one dashboard in Sage CRM.
- Your default dashboard.

Setting up a new classic dashboard

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

1. Click **My CRM | Dashboard**.
    - If the system administrator has not set up a standard dashboard, the Dashboard Details page is displayed.
    - If a standard dashboard has been set up, then the Dashboard page displays the content from the default dashboard. If this is the case, click **New Dashboard** to create a new dashboard.
    - If multiple dashboards already exist, but no default has been set, then the system displays the first dashboard in the drop-down list. If this is the case, click **New Dashboard** to create a new dashboard.
    - If you're viewing an interactive dashboard, click **Classic Dashboard**, then add the new dashboard.
2. Enter a name for the new dashboard. If a dashboard with the same name already exists, a warning prompt is displayed, however you can still add a new dashboard with the same name as an existing dashboard.
3. Select **Set As Default** to make this the default dashboard. **Set As Mobile Dashboard** makes the dashboard available on mobile devices.
4. Click **Continue**. The Dashboard Content page is displayed.
   The Dashboard Content page is divided into the **Available Content** panel and the **Selected Content** panel.
    - Click **Add** next to the item in the Available Content list to add it to the **Selected Content** panel.
    - Use the **Filter By** drop-down list to narrow down the list of all content to view content by area, for example, all content related to Opportunities.
    - Use the Blocks radio buttons to filter the list of all content to view content by narrow or wide widths. The system administrator is responsible for defining the width of the content.

5. Select and add the content to the **Selected Content** panel.
    - To remove a selected content item, highlight the item in the Narrow or Wide content list, and click the **Remove** button to the right-hand side of the Narrow or Wide content list.
    - You can also remove a selected content item by clicking the **Remove** button next to the item in the **Available Content** panel.
    - To change the order of a selected content item, highlight the item, and click the up and down arrows to the right-hand side of the Narrow or Wide content list.
    - Narrow columns are displayed by default on the left-hand side of the Dashboard page. You can switch this by selecting the **Right** radio button at the top of the **Select Content** panel. If only wide content is selected, it is displayed spanning the whole width of the Dashboard page.
    - The double arrows move a content item to the top or bottom of the list of Selected Content.
    - Click **Clear** to clear all the selected content in the Narrow or Wide content list.
6. Click **Save**. The new dashboard is displayed.
    - The Dashboard toolbar is displayed in the top left-hand side of the Dashboard page, showing the dashboard you created in the drop-down list.
    - You can use the Dashboard toolbar to set up another dashboard, modify the existing dashboard, and switch between existing dashboards. To print your dashboard, click **Print**.

You can set the Dashboard page to be the first page you see when you logon to Sage CRM by selecting Dashboard from the Log Me Into field on **<My Profile> | Preferences**.

Changing content directly from the classic dashboard page

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

- You can minimize, restore, or remove dashboard content by clicking the icons in the top right-hand corner of the content panel.
- You can change the columns that appear on content panels, and reduce the size of wide content panels, where you see the **Customize Columns** icon in the top right-hand corner of the content panel.
  If you remove columns on a content panel, they will stay hidden, even if you remove the entire dashboard content panel, and replace the content panel later on. To unhide columns, click the **Customize Columns** icon and check the boxes next to the hidden columns.
- When a list of content is longer than 10 records, or longer than the Grid Size set in **<My Profile> | Preferences**, then a **View All** option is available. Click it to view all the records of this content panel in a new browser window.

- When a Calendar or Tasks list includes more than 10 records, or is longer than the Grid size set in **<My Profile> | Preferences**, then a **View Calendar** option is available. Click it to access the **Calendar** tab.

Editing classic dashboard details

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

Click Edit Dashboard Details to change the dashboard name or the default settings:

- To return to the Dashboard page, click **Save**.
- To display the Dashboard Content page, click **Continue**.
- To reset a standard Dashboard to the system default, click **Reset Standard Dashboard**. When you edit a standard Dashboard, you're making your own personal version of the Dashboard. This doesn't affect other users' standard Dashboards in any way.
- To delete a Dashboard, click **Delete**.

You can only change the name of a dashboard, or delete a dashboard that you have created. You cannot change the dashboard name of or delete a standard dashboard created by your system administrator.

Modifying classic dashboard content

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

1. Click **My CRM | Dashboard**.
2. Click the dashboard you want to modify from the drop-down list at the top of the page.
3. Click the **Modify Dashboard** icon. The Dashboard Content page is displayed.
4. Modify the content.
5. Click **Save**. The modified dashboard is displayed.

Adding saved searches to a classic dashboard

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

All users can set up saved searches. Saved Searches can then be selected from the list of Available Content to display on a dashboard.

To make a saved search list available on the dashboard:

1. Set up a saved search. For example, all companies in the city of New York.
2. Click **My CRM | Dashboard**, and click **Modify Dashboard**. The Dashboard Content page is displayed.
3. Click the **Saved Search** category from the **Filter By** drop-down list. The saved search you created is displayed in the list of **Available Content**.
4. Click the **Add** button next to the saved search you created.
5. You can also select Saved Search Summaries from the **Available Content** list. This displays a count of the number of records in each of your saved search.
6. Click **Save**. The dashboard page is displayed, showing the Saved Search list you created.

Adding favorite reports to a classic dashboard

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

All users with access to Reports, can select reports they run frequently as "favorite" reports. These reports can be run from the dashboard if the Favorite Reports content item is selected.

To run a favorite report from the dashboard:

1. Make sure you have at least one report set as a Favorite report.
2. Click **My CRM Dashboard**, and click **Modify Dashboard**.
   The Dashboard Content page is displayed.
3. Click the **Other** category from the **Filter By** drop-down list.
4. Click **Add** next to the Favorite Reports content item.
5. Click **Save**. The dashboard page is displayed. The **Favorite Reports** content panel is displayed on the dashboard with all of your favorite reports.
6. Click the report you want to run. The report Display Options are displayed in a new window.
7. Confirm the Display Option, for example, **Screen**, and click **Go**.
   The report output is displayed in a new browser window.

Adding report charts to a classic dashboard

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.
The account you use must have Info Manager rights.

Users with Information Manager security rights can create new reports and modify existing reports. If **Available On Dashboard** is selected in the **Chart Options** panel of the Report Options, Step 2 of 2 page, the chart is displayed for selection by the user in the **Report Charts** category on the Dashboard Content page.

1. Edit an existing report, and navigate to the **Chart Options** panel on the Report Options, Step 2 of 2 page.
2. Select the **Available On Classic/Interactive Dashboard** check box on the **Chart Options** panel, and complete the other **Chart Options** fields. This checkbox isn't available on the **Chart Options** panel of Historical reports.
3. Click **Save**.
4. Click **My CRM | Dashboard**, and click **Modify Dashboard**. The Dashboard Content page is displayed.
5. Select **Report Charts** in **Filter By**.
6. Click**Add** next to the Report chart you added. If the Report Chart comes from a report with multiple saved searches, then a Report chart panel is available for selection for each saved search and for the full report.
7. Click **Save**. The dashboard page is displayed. The report chart is displayed on the dashboard. You can click the **View Full Report In New Window** icon to view more of the report. This icon isn't available on "standalone" chart content panels. These can be identified in the content lists by the prefix **Chart**.

Built-in animation means that you can watch charts grow as they is formed. You can also interact with charts once they are drawn – for example, highlighting slices and rotating pie charts. For more information on working with charts, see Running a report.

Setting up a classic company dashboard

> **Note:** The classic dashboard is a legacy feature that's available for upgrade customers only.

The Dashboard tab within the Company context can be used to display a management overview of customer information. Once a Company dashboard is set up, the same dashboard will be available from the Company context page of all companies.

1. Within the context of a company, click the **Dashboard** tab.
    - If the system administrator has not set up a standard company dashboard, the Dashboard Content page is displayed.
    - If a standard Company dashboard has been set up, then the Dashboard page is displayed, showing the content from the standard company dashboard. If this is the case, click **Modify Dashboard** to review the existing content.
2. In the Available Content panel, click **Add** beside the content panels you want to add to the dashboard. The selected content is listed in the **Selected Content** list.
3. Click **Save**. The Company Dashboard is displayed.

Click **Reset Standard Dashboard** to revert to the Standard Company Dashboard, set up by the system administrator.

Modifying the content of the classic company dashboard

Note: The classic dashboard is a legacy feature that's available for upgrade customers only.

1. Within the context of a company, click the **Dashboard** tab. The Dashboard page is displayed
2. Click **Modify Dashboard**. The Dashboard Content page is displayed.
3. Make the changes you require.
4. Click **Save**. The Company Dashboard page is displayed with the changes you made.

Mobile

- Working with mobile apps
- Using Sage CRM on a mobile device

Working with mobile apps

1. Ensure your mobile device meets the requirements in the *Software Requirements and Mobile Features* guide posted on the Sage CRM Help Center.
2. Connect your mobile device to the Internet and install the Sage CRM mobile app.
   - **Sage CRM for iPhone**. Install this app from the Apple App Store.
   - **Sage CRM for Android**. Install this app from the Google Play Store.
3. Open the mobile app and log on to Sage CRM:
   a. Tap **On-Premise**.
   b. In **CRM URL**, type the Sage CRM access URL. You don't need to specify protocol (*http://* or *https://*). Contact your system administrator for the URL you need to type.
   c. Type your Sage CRM user name and password.
   d. Tap **Log on**.

Using Sage CRM on a mobile device

- Logging on and logging off
- Adding a home screen icon
- Finding information
- Changing information
- Adding information
- Navigating your calendar
- Running a report
- Working with the classic dashboard

Logging on and logging off

1. Open the web browser on your mobile device and enter the URL given to you by your system administrator.
   If you already access Sage CRM from your desktop, enter the URL you normally use. For example: *http://yourserver/yourapp*.

2. Enter your user name and password and tap **Log On**. When you log on first, you're brought to the Sage CRM Mobile homepage where, depending on your user rights, you can see the main Sage CRM menu options.
3. To log off, tap **Logout** on the homepage menu.

You're automatically logged off if you close the browser window or navigate to another site within the same browser window.

Adding a home screen icon

To add a Sage CRM icon to your home screen:

1. Access Sage CRM Mobile on your device.
2. Tap the **Add Bookmark** icon on the bottom toolbar, then **Add to Home Screen**.
3. On the Add to Home screen, tap **Add**. The browser app closes, and a Sage CRM icon appears on your home screen.

On some devices, you may be able to add a Sage CRM home screen icon directly from the home screen:

1. Tap the **menu** button on your device.
2. Tap **More**, then **Add shortcut to Home Screen**. The Sage CRM icon is displayed on your home screen.

Finding information

1. Tap **Find** on the homepage menu.
2. Select the entity category from **Company**, **Person**, **Case**, **Opportunity**, or **Lead**.
3. Enter one or more search criteria.
4. To start the search, tap the **Find** button.
5. If there's more than one page of results and you want to view another page, enter a page number and tap **Go to page**.
6. To drill down into the information, tap the record link or side arrow if present.
7. To find a communication that's linked to a company, person, or opportunity:
    - Find and open the company, person, or opportunity record.
    - Tap **Communications** from the list in the context area.
    - Tap **Communications** from the list in the context area.

8. For a company, person, or lead record, you can do the following.
    - If you're using a tablet, tap a phone number to create a new contact or update an existing contact in your tablet's contact book. This behavior is device dependent.
    - If you're using a smartphone, tap a phone number to make a phone call directly from any record containing a valid phone number.
    - To view a map of a contact's location, tap the **Search** icon in **Address**. To let Google Maps use your current location, tap **OK**. The map is displayed in a new window.

Sage CRM Mobile cannot display documents associated with a company, person, case, opportunity, or lead.

Changing information

1. Find and open the record you want to edit.
2. Tap **Change**.
3. Tap the field you want to update and make your changes. The updated information is displayed on your mobile device and also in desktop Sage CRM.
4. Tap **Save**.

Your Sage CRM administrator may have disabled updates to certain types of information to ensure that workflow is not compromised. In this case, **Change** is not available.

Adding information

1. Tap **New** on the homepage menu.
2. Select the entity category.
3. Complete the entry screen fields. You might need to swipe down to complete all the fields.
4. Tap **Save**. The new information is displayed on your mobile device and also in desktop Sage CRM.
5. To create a communication that's linked to an existing company, person, or opportunity:
    - Find and open the existing company, person, or opportunity record.
    - Tap **Communications** from the list in the context area and tap **New**.
    - Enter the details and tap **Save**. The communication is saved in the context of the existing record.
    - You can create new person, opportunity, and case records in the same way. The new record is saved in the context of the existing record.

Workflow actions are not available in Sage CRM Mobile.

Navigating your calendar

The calendar on a mobile device looks similar to the desktop version of the calendar. For more information about using the calendar, see Calendar.

Running a report

1. Tap **Reports** on the homepage.
2. Select a report category. Depending on your access rights, you can run sample Sage CRM reports and any reports that you've already created on your desktop.
3. Tap the report you want to run.
4. Select search criteria and tap **Run**. The report is displayed. To view the full report details, you may need to swipe down or rotate your mobile device if it supports horizontal viewing.

Working with the classic dashboard

> **Note:** Classic dashboards are available for upgrade customers only.

Tap **My CRM** on the homepage menu and tap **Dashboard**.Your preferred dashboard is displayed.

The Interactive Dashboard is not available using the Tablet view. You can access it from a tablet using the Desktop view.

Other modules

- Computer telephony integration (CTI)
- Self Service

Computer telephony integration (CTI)

- About CTI
- Downloading the CTI Plugin
- Making an outbound call
- Taking an inbound call
- Handling connected calls
- Working with the Active Calls list

About CTI

Sage CRM CTI allows users to view information about incoming calls and perform various telephony functions. The features of Sage CRM CTI include:

- Auto caller identification (caller ID).
- The ability to view the most relevant Sage CRM screen to them when they click on the inbound call hyperlink.
- The option to go directly to the relevant Company or Person screen while the call is active.
- Auto dial-out via hyperlinked phone numbers.
- The option to transfer and put calls on hold.

Downloading the CTI Plugin

When you log onto Sage CRM for the first time having been CTI-enabled, you are prompted to download the CTI plugin. To download the CTI plugin, follow the instructions provided on-screen. You only need to do this once. If you receive an upgrade, or change machines, you are prompted to download the plugin again.

Once the plugin has been downloaded and installed, you can start working with CTI using the CTI Call Screen pop-up window. You can minimize the pop-up and CTI remains active. If you **close** the pop-up window, CTI is no longer active and you cannot make or received calls using CTI.

To activate or reactivate the CTI Call Screen pop-up, select the **CTI** option (telephone icon) from the Main Menu.

Making an outbound call

Once you have been enabled as a CTI user:

- All phone numbers in Sage CRM display as hyperlinks.
- Even phone numbers in the context area of the screen are displayed as hyperlinks.

To make an outbound call:

- Click on the hyperlinked phone number you want to call. For example, click on the Phone hyperlink in the context area.

The Call screen is then displayed with the number you clicked on in the Active Calls field. The Active Call field shows:

- The full telephone number you selected, including Country Code and Area Code.
- Once you have clicked on the Dial button, the word "Dialing" is displayed in the Enter Number field to indicate that the number is being dialed.

You can stop dialing at this point if you wish by clicking on the Hangup button. The Call is ended. If you do not have it set to be displayed at all times, the Call screen is hidden.

You can make a call to a number that is not in Sage CRM

Although numbers in Phone Number fields can include symbols and spaces, this is not the case when you enter a number on the CTI Call screen. When entering a phone number on the CTI screen, do one of the following:

- Type the "simple" number—you can include spaces but not symbols. For example *44 161 5527789*.
- Type the number in canonical format—that is, <plus sign> <country code> <area code in brackets> <number>. For example, *+ 44 (161) 5527789*.

To make a call to a number that is not in the Sage CRM system:

1. Select the **Telephone** menu button to display the Call screen.
2. Type the number you want to call in the **Enter Number** field.
   For example, include an international code, a country code, and an area code if you are dialing an international number. If you are dialing a different area code within the same country, type the code followed by the number. However, if you are dialing a local number, just type the phone number. Similarly, dialing an extension number simply requires you to input the extension.
3. If you want to stop dialing, select **Hangup**.

Taking an inbound call

When an inbound call is directed to your extension number:

- The CTI call screen is displayed in a pop-up window in Sage CRM.
- The phone number is displayed in the **Active Calls** list followed by the word "Ringing" to indicate that the call is coming in.
- If the incoming call number matches a company or person in the system, the contact is listed underneath the Active Calls field.
- If the incoming call matches more than one contact in the system, all the contacts are listed.
  A matching number is any number in the contact database that has the same number as the caller Id or is a prefixed match against the caller Id.
- If the incoming call is from a user in Sage CRM (that is, a colleague) as opposed to a contact, the word **Internal** is displayed on the list.

To answer the inbound call, click the **Answer** button or pick up the receiver.

When you do this, the incoming call number is displayed on the Active Calls list followed by the word **Connected**, and additional buttons become available, which you use to handle the call.

When you click on the hyperlink of an active call, the CTI Call Screen set up for you by your System Administrator is displayed. If you are a sales person and your CTI Call Screen is the New Opportunity screen, for example, clicking on the active call hyperlink displays the New Opportunity screen. The screen gathers context information so that you can quickly log a case for the Sage CRM customer who just called.

Handling connected calls

When you answer a call, or if a call you make is connected, you can do the following from the connected call screen:

- **Hangup**. Speak to the caller, and when you have completed the call, select Hangup to end the call.
- **Hold**. Put the caller on hold while you deal with a query by selecting the **Hold** button. When you do this, the **Unhold** button is displayed. The **Hold** button is not visible if the number dialed is busy or invalid.

- **Unhold**. Resume a call that is on hold. When you select the **Unhold** button, the **Hold** button becomes available again.
- **Transfer**. Transfer the call directly to another extension number. When you do this, the call goes straight through to the extension number you specify, and you are hung up. The transfer functionality is available for TAPI implementation only. To transfer a call directly to a colleague, type the extension number you want to transfer the call to in the **Number** field, and select the **Transfer** button. The call is transferred directly to your colleague.
- **Consult**. Consult with a colleague before you transfer a call to them. To do this:
    a. Type your colleague's extension number in the **Number** field, and select the **Consult** button.
    b. When you do this, your colleague's number is dialed and if they pick it up, you are presented with two buttons, **Complete Transfer** and **Hangup**. Talk to you colleague, for example, ask them are they free to take the call.
        - If they can take the call, select the **Complete Transfer** button to transfer it to them.
        - If they are not available to take the call, select the **Hangup** button to return to the call.
    c. You then need to select the **Unhold** button to speak to the caller. Once you do this, you are returned to the connection call screen where all of the call options become available again.

Working with the Active Calls list

The Active Calls list displays information about the current status of the call.

For example:

- The list is empty if you have no active calls.
- It shows the number you are dialing, followed by the word **Dialing** if you are making an outbound call.
- It displays the incoming call number followed by the word **Ringing** when a call is coming in.
- When you answer an incoming call or are connected to a number you dialed, it shows the number followed by the word **Connected**.
- If you select the **Transfer** or **Consult** button when a call is connected, the list displays the status of the external call, for example, **Holding, Pending, Transfer**, as well as the status of the number you are transferring to or consulting with, for example **Connected, Consulting**.

Self Service

- About Self Service
- Enabling a Person for Self Service
- Enabling a Company for Self Service
- Logging on to Self Service
- Anonymous visitors
- Newsletter
- Registered visitors
- Reviewing existing cases
- Logging a new case
- Requesting information

About Self Service

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

With Sage 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.

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

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

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 hyperlink of their name to display the Person Summary page.
2. Select the **Self Service** tab.
3. Select the **Self Service Enabled** check box. 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.

The next time you select the **Self Service** tab for that person, Self Service and Person details are displayed.

Enabling a Company for Self Service

You can 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.

> **Note:** If you disable a company for Self Service, all people linked to that company who were previously enabled for Self Service will be disabled also.

Logging on to Self Service

To log onto the Self Service web site, enter the Self Service address in your Web browser. The Self Service home page is displayed.

A typical Self Service URL will look something like this, depending on where the Web site is installed: *http://localhost/CRMselfservicedemo/*.

Note: To find out the Self Service web site address you need to use, contact your System Administrator.

Anonymous visitors

Anonymous visitors are visitors who are not registered as Sage 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 demo site example illustrates what functionality can be designed specifically for anonymous users.

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 demo Self Service 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.
- **Newsletter**—a page with specific Self Service functionality.
- **Contact Us**—an information page.
- **Home**—the home page.

Newsletter

The **Newsletter** area of the Self Service web site can be designed especially for anonymous users in a similar way to how the demo site is designed.

To access the **Newsletter** area of the site:

1. Select the **Newsletter** tab. The **Newsletter** form is displayed.
2. Complete the fields on the form.
3. Select the **Save** button. When you do this, the information you typed is registered as a lead in Sage CRM. From here, the lead can be assigned to a Sage CRM user, the visitor can be converted to a Person in Sage CRM and the lead can be eventually converted into an opportunity.

Registered visitors

Registered visitors must already exist as people or companies in Sage CRM, and they must have been enabled for Self Service and assigned a Self Service logon ID and password.

The demo Self Service site comprises the following areas:

- **About Us**—an information page.
- **Services**—an information page.
- **Support**—a page where existing cases can be reviewed.
- **Newsletter**—a page with specific Self Service functionality.
- **Contact Us**—an information page.
- **Home**—the home page.

For example, registered visitors can use the Self Service web site to do the following:

- Review their current cases.
- Log a new case.
- Request product information.

Reviewing existing cases

To access the Support area of the Self Service web site:

1. Open the Self Service Web site and select the **Support** tab. The Support logon page is displayed.
2. Type your user name and password and click the **Login** button. A list of your recent customer case issues is displayed.
3. Click on the case's created date to edit the case.
4. Select the **Change** button. The Problem Details form is displayed in edit mode.
5. Add more information or amend the current details, and select the **Save** button.

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

Logging a new case

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

1. Select the **Report a Problem** hyperlink. The Report a Problem form is displayed. The case is assigned a ReferenceID by default.
2. Enter 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 Product Information** hyperlink. The Request Information input form is displayed.
2. Complete the **Description**, **Details**, and **Customer Ref** fields, and select a product from the Product list.
3. Select the **Save** button. The request for information is submitted to Sage CRM, which results in a new Opportunity being created. The opportunity can then be assigned to a Sage CRM user and the request for information dealt with.

Glossary

A

Action Button

Action buttons are usually found on the right-hand side of the screen. They help you add and change information and perform different tasks within the system. The action buttons available to you change depending on where you are. Examples of Action buttons are: Change, Delete, Confirm Delete, New Task, New Appointment.

Advanced Find

Allows users to create enhanced search queries based on complex SQL statements using WHERE, AND, and OR clauses.

Apply Filter button

The apply filter button allows you to restrict lists of information by a predefined set of criteria.

C

Campaign

A campaign is a planned rollout of marketing activities in phases, or Waves. Each phase can in turn be made up of several actions or Wave Activities. Each action can in turn be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography.

Case

A case is a customer service issue. These issues can range from a technical problem to a customer complaint. A case keeps track of the issue from the initial logging through to resolution. Multiple communications (or tasks) can be linked to one case.

Combination

A bar chart indicates one set of data and a line chart indicates another set of data so you can get a wider view of results in one place. A combination chart is useful in a Monthly Sales Trends report to show information such as the revenue earned from sales and the number of sales that were closed in a particular period.

Communication

Communication refers to a task or meeting. The specific types of communication are determined as action types. For example, Letter In, Letter Out, Phone In, Phone Out, Demo.

Company Team

A Company Team is a group of users linked to a company for the purpose of tracking account management responsibilities.

Context Area

The context area displays a summary of the information you are currently focused on. Example: If you are working in the context of a person, their name appears on the top of your screen. Within the same context area you can see their company, phone number, and e-mail address. You can quickly move from the context area of a person to the company they work for by clicking on the Company link within the context area.

D

Dashboard

The Dashboard is a customizable page that contains information most relevant to your daily work. For example, a list of the companies you most often work with.

Document Drop

The Document Drop feature provides a short cut for linking documents, e-mails and other types of files from another application to customer data in CRM.

Documents Tab

The Documents tab is available within the context of a person, company, opportunity, case, or solution. It stores a link to a document.

F

Favorites

Click the Favorites icon on the top bar to display a list of your favorite Sage CRM records that you can access quickly. You can favorite a company, person, case, opportunity, lead, solution, communication, order, quote, or custom entity record.

Find page

The Find page is displayed when the user clicks Search | <Entity>. There is a Find page for companies, people, opportunities, leads, solutions, cases, and communications.

Forward and Back buttons

The Forward and Back buttons take you one step back or one step forward from your current position in the system. While using the system, they are intended as a replacement for the Forward and Back buttons within your Web browser window.

G

Gauge

Partitions on the chart indicate three ranges in relation to a target value; below, approaching, exceeded. The gauge needle indicates the current value. A gauge chart is useful in an Actual vs Target sales report to show how your actual sales compare to your forecasted sales for a particular period.

Groups

Groups allow users to create collections of records within CRM. Groups can be static or dynamic.

K

Keyword Search

To search for keywords across specified primary entities, click the Search arrow and click Keyword Search. You can include wildcard characters to search for a variety of text and characters.

L

Lead

A lead represents unqualified information received from your corporate Web site, trade shows, and purchased mailing lists.

Line Item

Line items are products that your customer is interested in buying. They are linked to the opportunity and selected through the Quotes or Orders tab.

M

MailChimp

An email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results.

Menu button

Menu buttons are found on the left-hand side of the screen. They help you navigate to commonly used pages. Menu buttons remain the same regardless of the company or individual or any other context you are working in. However, one user may see a different set of menu buttons to another, since access to these is set up in the user profile. Examples of Menu buttons are: New, Find, Team CRM.

My CRM

The My CRM button shows a series of tabs all containing information related to the logged in user. Depending on the user's rights, the My CRM areas of others can also be viewed by selecting another person from the context area of the screen.

N

Next and Previous arrows

The Next and Previous arrows appear when a list of information extends to more than one page. Clicking on the left- or right-pointing arrows will display the previous or next page respectively. The outer arrows take you to the first or last page within a set of pages.

Notifications

Click the Notification icon on the top bar to display a list of active notifications. Notifications are usually reminders for tasks or appointments, or system alerts set up by the user or the system administrator.

O

Opportunity

An opportunity refers to a sales opportunity. Opportunities track sales interest from the initial qualified lead through to closing the deal.

Outbound Call List

Outbound Call Lists are used for high volume telemarketing activities, where calls are not preallocated to individual users, and a Communication record is only created when a successful contact is made.

P

Panel

A panel groups related information for easier viewing. One page of information can be divided into a number of panels.

Progress button

The progress button is available in the context of leads, opportunities, solutions, and cases when the workflow functionality is not in use. It can be accessed from the lead, opportunity, solution, or case summary page. It allows users to change the Stage, Status and other data relating to the lead, opportunity, solution, or case. It also allows users to add a tracking note, which forms part of the history of the lead, opportunity, solution, or case "life cycle".

Q

Quick Find

You can enter key terms in Search on the top bar to search all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once.

Quick Look

The Quick Look tab shows you the most recent communications, opportunities and cases associated with a company or person.

R

Recent list

Click the Recent icon on the top bar to display a list of records you viewed recently. This list saves company, person, opportunity, quote, order, lead, case, solution, campaign, and group records.

Relationships

The Relationships tab is available within the context of all main entities. You can show links between different types of information. For example, you can set up a relationship between a company and its directors, or between an opportunity and the people influencing it. Your System Administrator defines the different Relationship Types that can be set up from each tab.

S

Shared Documents

The My CRM | Shared Documents tab lists all the Shared Documents and Templates you have access to.

SLA

SLA stands for Service Level Agreement. A Service Level Agreement is made between your organization and a customer to set standards for customer service case resolution times. Service level agreements can be linked to companies and to individual customer service cases.

SMS

SMS stands for Short Messaging Service. If this feature is activated for your system, SMS is used to notify users via their mobile phone or other wireless device of events taking place. For example, you can receive a reminder of an upcoming meeting via SMS messaging. It can also be used in conjunction with workflow to notify users of new leads, overdue cases, or closed opportunities.

Solution

Solutions are the "cleaned and approved" basis of a knowledge base. Solutions can be accessed by internal CRM users, as well as customers and partners via a self service Web site. Solutions are a separate entity from Cases, but they can be linked to multiple cases—and a case can be linked to multiple solutions.

Sort

You can change the sort order of any list by clicking on the underlined column heading.

Stacked chart

Bars are stacked on top of each other to display grouped data. It provides a wider view of data than a regular bar chart. A stacked chart is useful in an Open Activities activity report to show several actions that occurred on a particular day or date.

T

Tab

Tabs are like folder dividers. The information found in each folder section is determined by the current context. For example, if the person "Anita Chapman" has been zoomed in on in the context area, selecting the Quick Look tab will display the most recent interactions your company has had specifically with Ms Chapman.

Tabs menu

The tabs menu provides quick access to main entities in Sage CRM. It's available on all screens in Sage CRM. Depending on your screen's size, the tabs menu can be found: Just under the top menu in Sage CRM. If there are too many tabs on the menu, some of them will be grouped down under a More heading. By clicking the <insert symbol image> icon at the top-left hand-side of the screen.

Team

A team is a group of users who perform similar roles. Tasks (communications), opportunities, leads, and cases can all be assigned to a team. A user can be a member of one team. This is called their Primary Team. A user can also have rights to view information in multiple teams.

Tracking note

Tracking notes are used in the context of leads, opportunities, cases, and solutions to make free text notes on the progress of the lead, opportunity, solution, or case.

V

Validation error

A validation error message appears on the screen when an incomplete or incorrect new entry has been made in the system. The user must fill in required fields that are empty, or correct an invalid entry, such as numbers in a text-only field. These fields are highlighted with a question mark and cross mark, respectively.

W

Wave

A Wave is a phase of a marketing campaign. Each wave can be made up of several actions or Wave Activities. Each action can in turn be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest.

Wave Activity

A Wave Activity is a type of action within a wave of a marketing campaign. Each wave activity can be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest. The first wave is made up of two different wave activities: "Flyer Mailing" and "Newsletter Mailing". The second wave is made up of the following two wave activities: "Invitation with Response Card" and "Response Card Follow-up", and so on.

Wild Card

The % wild card helps you complete unspecific searches. The % (percentage) symbol, means "contains". For example, typing "%software" in the Company Name field of the company Find page returns a list of all companies, which contain the word "software" in their company name.

Workflow

Workflow automates your company's business processes using a predefined set of rules and actions.

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