Sage CRM 7.3 SP1

User Guide

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Chapter 1: About this guide

This guide is for Sage CRM end users who know how to use a Web browser.

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.

Chapter summary

Part I: Basics

Chapter	Description
Getting Started	Logging on and basic navigation.

Part II: Contact management

Chapter	Description
Finding Information	Searching for different types of information, change your search criteria, and work more effectively with large amounts of data.
Adding Customer Information	Building a customer profile, and how to update and keep customer information current.
Appointments and Tasks	How to manage your calendar, schedule meetings, and set reminders.
Email	How to send and reply to emails from CRM, and make use of email templates.
Exchange Integration	Working with Sage CRM Exchange Server Integration, and installing the Outlook plug-in.
Classic Outlook integration	How to work with Classic Outlook integration including synchronizing contacts, tasks, and appointments.
Managing Documents	How to merge customer data with documents for printing, faxing, or emailing.

Chapter	Description
Running Reports	How to run list, cross tabular, historical, and summary reports.
Working with Lists	How to carry out actions, such as mail merges, on search lists, saved searches, and the Contacts lists.

Part III: Sales

Chapter	Description
Sales Opportunities	How to take a qualified lead through to a done deal.
Sales Forecasting	How to create and submit a sales forecast.

Part IV: Marketing

Chapter	Description
Leads	Handling unqualified prospect information.
Outbound Call Handling	How to work through an outbound call list.
Groups	How to set up and manage groups.
Campaign Management	How to manage and track marketing campaign activity.
MailChimp Campaigns	How to create a MailChimp campaign and view campaign statistics.

Part V: Customer service

Chapter	Description
Cases	How to take a customer service issue from logged through to resolution, and working with Service Level Agreements.
Knowledge Base	How to create and publish Solutions to build up your knowledge base.

Part VI: Tools

Chapter	Description
Interactive Dashboard	How to set up interactive dashboards and add gadgets.
Classic Dashboard	Setting up customized classic dashboard pages to reflect the way you work.
Preferences	Customizing the way you see information in the system.
Writing Reports	How to create and customize reports.

Introduction to Sage CRM

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.

CRM can bring it all together.

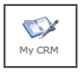
Browse Customer Information

Contact Management:

- Find customer information fast.
- 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

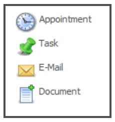
Communication Management:



- 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.

Tools at your Fingertips

Document Management:



- 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.

Qualify Leads

Marketing:

- 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.

Clinch a Deal

Sales Management:

- 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.

Produce Professional Reports

Reporting:

- 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

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

Customization:

- 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.

Chapter 2: Getting started

- Logging on
- Changing your password
- Resetting your password
- Logging off
- Basic screen elements
- Tabs
- Navigating
- Onscreen coaching
- Getting help

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. For example, your Calendar.

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

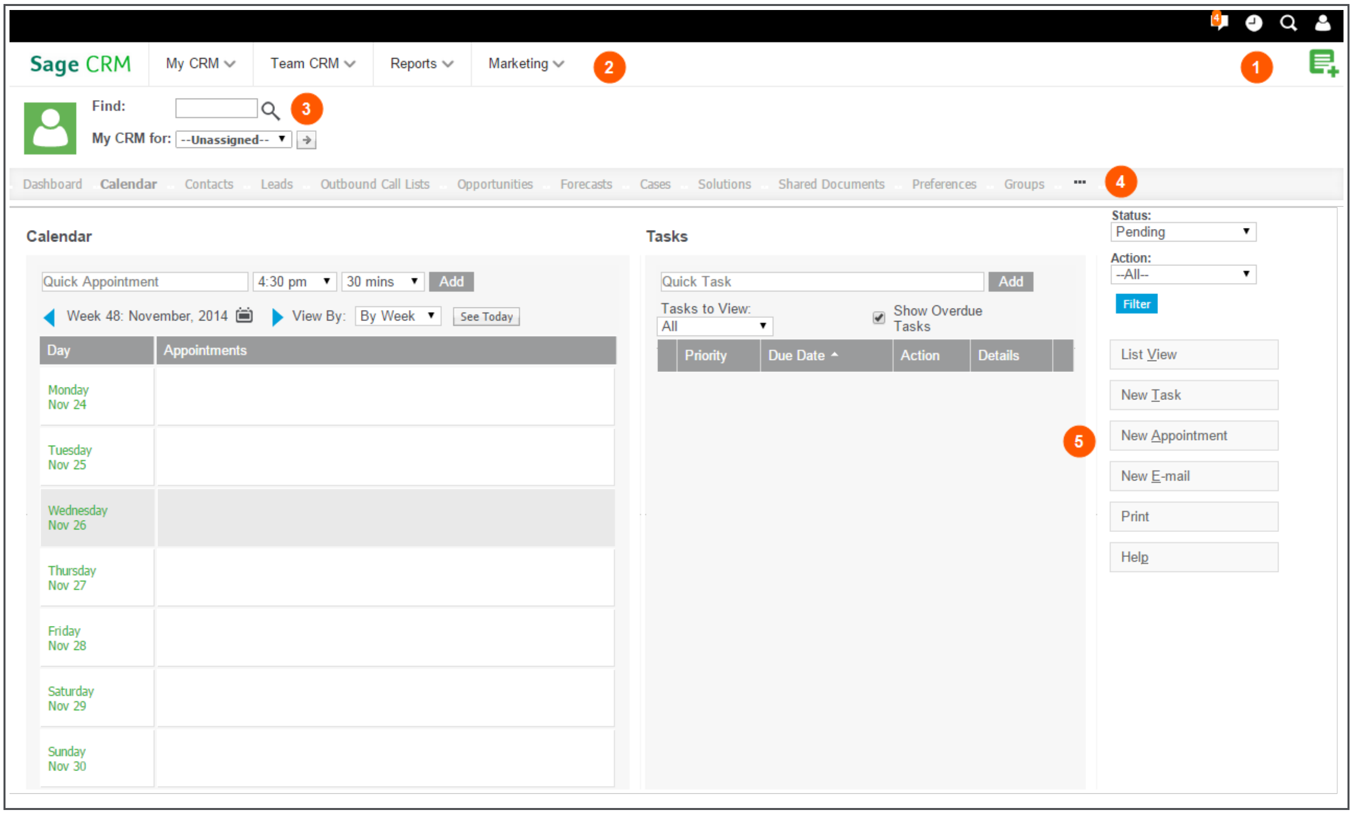
If you've forgotten your password and cannot log on, contact your System Administrator who will reset it for you.

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


Sage CRM
My CRM
Team CRM
Reports
Marketing
2
1
Find:
3
My CRM for: --Unassigned--
Dashboard
Calendar
Contacts
Leads
Outbound Call Lists
Opportunities
Forecasts
Cases
Solutions
Shared Documents
Preferences
Groups
4
Calendar
Quick Appointment
4:30 pm
30 mins
Add
Week 48: November, 2014
View By: By Week
See Today
Day
Appointments
Monday Nov 24
Tuesday Nov 25
Wednesday Nov 26
Thursday Nov 27
Friday Nov 28
Saturday Nov 29
Sunday Nov 30
Tasks
Quick Task
Add
Tasks to View: All
Show Overdue Tasks
Priority
Due Date
Action
Details
Status: Pending
Action: --All--
Filter
List View
New Task
New Appointment
New E-mail
Print
Help
5

Sage CRM screen has the following elements:

1 (*Top Bar*). Provides quick access to active notifications, recently viewed records, and **<My Profile>** area. You can also use the Top Bar to create new records in Sage CRM.

The Top Bar has the following icons:

🗨 (*Notifications*). Click to display a list of active notifications. Notifications normally remind you of tasks, appointments, or system alerts set up by you or your system administrator. This icon displays the number of active notifications, if any.
You can click a notification in the list to open the related record.
To dismiss a particular notification in the list, click the cross icon (**x**) next to the notification.
To dismiss all active notifications in the list, click **Clear All** at the top of the list.
To snooze a particular notification in the list, click **Snooze for** next to the notification and select

a snooze duration.
To snooze all active notifications in the list, click **Snooze all for** at the top of the list and select a snooze duration.

(*Recent*). Click to display a list of records you viewed recently. By default, the list has a limit of 10 recent records per entity.
To open a recently viewed record, click that record in the list.
To open the Find screen for an entity, click the entity icon in the list.
To clear the list, click **Clear** at the bottom of the list.

(*Find*). Click to search for records in Sage CRM. You can use the following search methods:
To search for entity records of a particular type, click **Find | <Entity>**.
To perform a complex search across Sage CRM entities, click **Find | Advanced Find**.
To search across all main Sage CRM entities at once, click **Find | Keyword Search**.

(*My Profile*). Click to access commands that allow you 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 from Sage CRM.

(*New*). Click to create a new item in Sage CRM such as record, task, appointment, or email. You can also use this icon to perform a mail merge.
To add a new record or communication in the context of the current record, click **New | <Item>**.
To export data to a PDF document, click **New | Merge to PDF**.
To export data to a Word document, click **New | Merge to Word**.

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.
To display or hide the tabs that are included in the **My CRM**, **Team CRM**, and **Reports** drop-down lists, point to the appropriate list and click **Configure**. Select or clear check boxes in the **Display Tab** column as appropriate, and then click **Save**.

3 (*Find field*). Allows you to find a Sage CRM user (when in *My CRM* mode) or team (when in *Team CRM* mode) and switch to that user or team provided that you have sufficient permissions in Sage CRM.

4 (*horizontal tabs*). Allow you to switch between all tabs of an existing record in Sage CRM.

5 (*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.

You can click the **Sage CRM** logo in the top left corner of the product window to return to your home screen from anywhere in Sage CRM.

A 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.

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 tabs
- Company and Person tabs

My CRM tabs

This section discusses each tab within the context of **My 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 correspondence.
Leads	Unqualified queries about your business.
Opportunities	Your current sales pipeline.
Companies	Companies in Sage CRM that you've rights to view.
People	People in Sage CRM that you've rights to view.
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.
Contacts	Contacts in Sage CRM that you want to synchronize with MS Outlook (in Classic Outlook integration or Exchange Integration).

Tab	Displays
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 theme, 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.
... (Ellipses)	Enables you to change the default tabs that are displayed in different areas of the system. For example, if you rarely work with Opportunities, you can remove this tab from your My CRM work area. However, you can easily enable it again if you change your mind.

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 Forecasts, Outbound Calls, Preferences, Contacts, Dashboard, E-marketing, or Exchange tabs in Team CRM.

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.
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.

Tab	Displays
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.
... (Ellipses)	Enables you to change the default tabs that are displayedin different areas of the system. For example, if you rarely work with Opportunities, you can remove this tab from your My CRM work area. However, you can easily enable it again if you change your mind.

Navigating

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

> 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
- Hover
- Hot keys
- Go arrows
- Search Select Advanced
- Required fields
- Getting Help

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**.

Right click

When you current theme is set to *Sage*, you can use right-click on **Find** and **New** to activate shortcut pop out lists. You must have the **Pop Out List Activation By** option set to **Click** in **My CRM | Preferences**.

Hover

When you current theme is set to *Sage*, you can configure the **Recent**, **Find**, and **New** lists to open when you point to them without clicking. To do so, go to **My CRM | Preferences** and set the **Recent List Activation By** and **Pop Out List Activation By** options to **Hover**.

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 and T** to create a new task.

When working with Internet Explorer, available hot keys include:

- **Alt + A**: Creates a new appointment within the Calendar or Communication tab.
- **Alt + N**: Inserts today’s date into a date field.
- **Alt + T**: Creates a new task from the Calendar or Communication tab.
- **Alt + E**: Creates a new email from the Calendar or Communication tab.
- **Alt + V**: Switches between Calendar and List view from the Calendar or Communication tab.
- **Alt + C**: Exitx from some screens.
- **Alt + S**: Saves records.
- **Alt + ↓**: Opens drop-down lists.

If you're working on another browser, use the following hot keys instead:

- Firefox: **Alt + Shift** + *Key*, and then press **Enter**.
- Chrome: use **Alt + Shift** + *Key*
- Safari: use **Alt + Ctrl** + *Key*

Go arrows

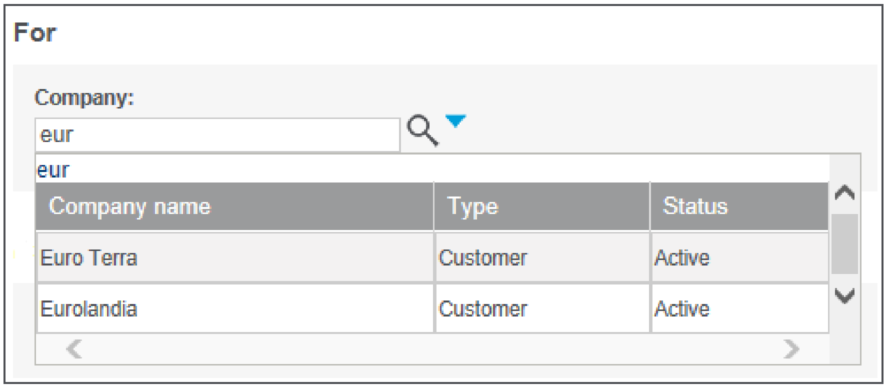
Icon	Description
▶	Click the triangular Go arrow to open the summary screen of the related record.
→	Click the right-pointing Go arrow to open another user's My CRM area from the context area of the screen.

Search Select Advanced

A small magnifying glass displayed next to a down-pointing arrow indicates a Search Select Advanced field. For example, the magnifying glass and arrow are displayed for the **Wave Activity** field on the New Lead page.

Icon	Name
🔍▾	Search Select Advanced field.

Use the **Search Select Advanced** icon to search for records in Sage CRM. Type a few letters, click the icon, and search matches are displayed beneath the field.



For

Company: eur

eur

Company name	Type	Status
Euro Terra	Customer	Active
Eurolandia	Customer	Active

Search Select Advanced results

Click a matching record to fill in the text box. If only one match is found, the text box is automatically filled in. Alternatively, click the 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 jump to the summary page of that record.

- **Ctrl + Click** the record name to display the record's Summary page within the context of the entity.
- Double click the record name to open it in a pop-up window.

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.

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 (page 24-1).
- To turn onscreen coaching off, click the **X** icon. 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 Guide*.

Getting help

- From within Sage CRM, if you're a bit lost, click **Help** to get contextual information about the screen you're in.

- For additional content, you can subscribe to the Sage CRM Community. You'll find blog articles, additional pdfs, white papers, customer stories, and user forums.
- For tutorial videos,go to the Sage CRM Video channel.

> Most videos available are in English. Some French, German and Spanish videos are also available for your convenience.

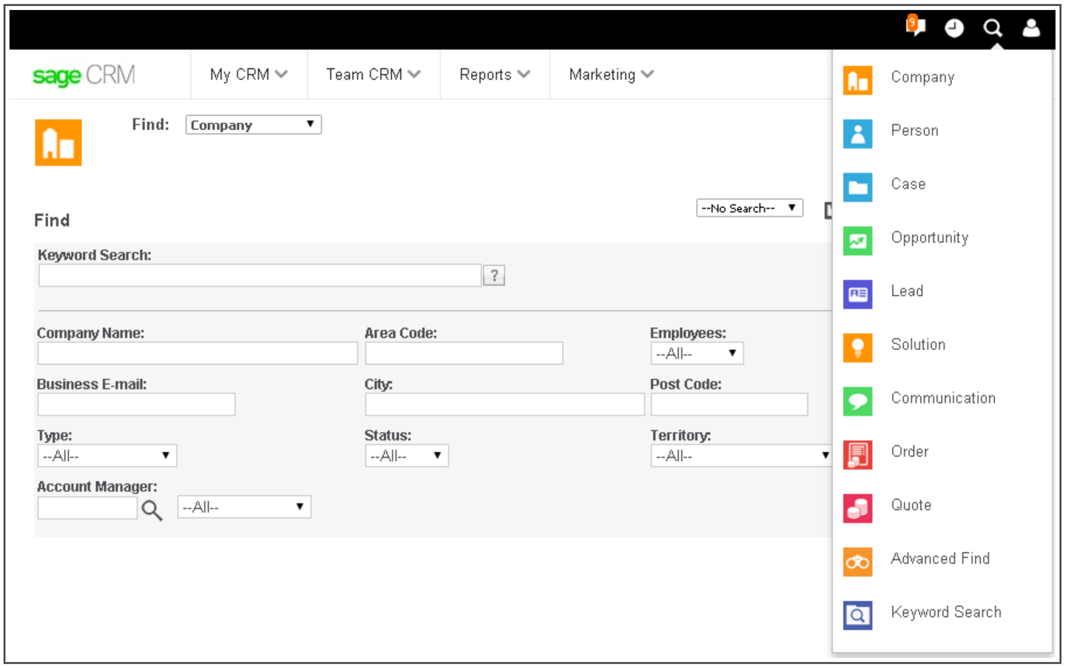
Chapter 3: Finding information

- Using Find screens
- Basic search techniques
- Searching for a Person
- Searching for a Company
- Finding an Opportunity
- Finding a Case
- Using Advanced Find
- Using Keyword Search
- Working with saved searches
- Working with lists
- Setting a default Find screen

Using Find screens

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

1. Click **Find | <Entity>** .



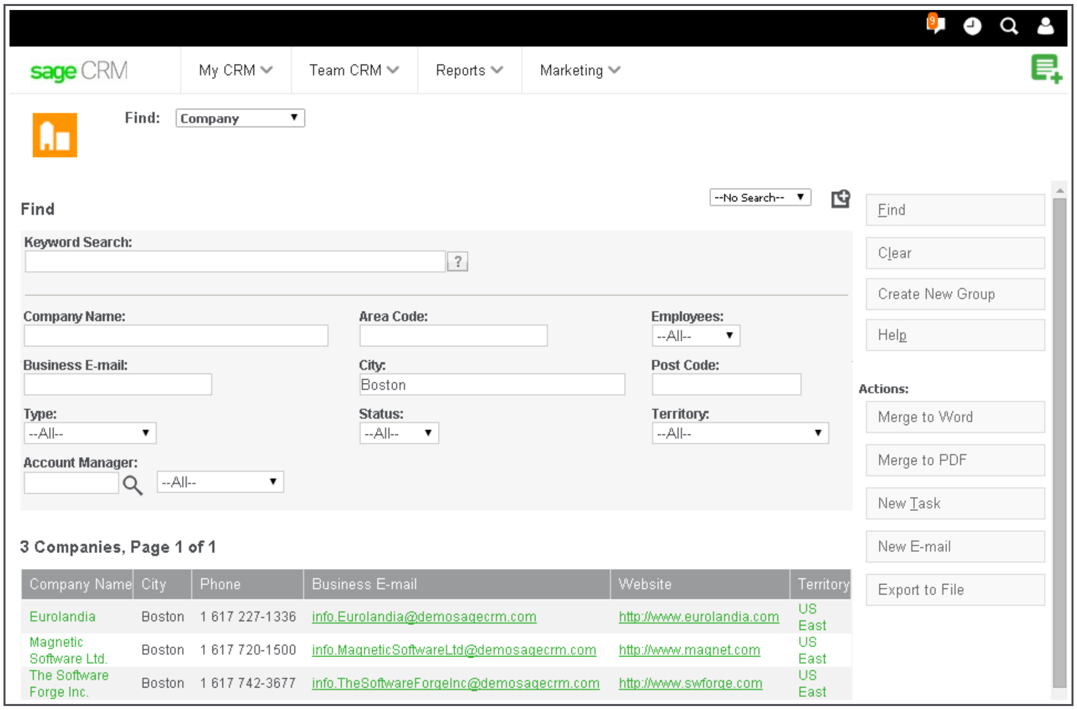
Find: Company

--No Search--

sage CRM
My CRM
Team CRM
Reports
Marketing
Find
Keyword Search:
?
Company Name:
Area Code:
Employees:
--All--
Business E-mail:
City:
Post Code:
Type:
--All--
Status:
--All--
Territory:
--All--
Account Manager:
--All--
Company
Person
Case
Opportunity
Lead
Solution
Communication
Order
Quote
Advanced Find
Keyword Search

2. Enter search criteria.
3. Click **Find**.

4. To open a record, click the entity link. For example, to view details about a Company, click the company name link.



Find

Keyword Search:

Company Name:

Area Code:

Employees: --All--

Business E-mail:

City: Boston

Post Code:

Type: --All--

Status: --All--

Territory: --All--

Account Manager: --All--

3 Companies, Page 1 of 1

Company Name	City	Phone	Business E-mail	Website	Territory
Eurolandia	Boston	1 617 227-1336	info.Eurolandia@demosagecrm.com	http://www.eurolandia.com	US East
Magnetic Software Ltd.	Boston	1 617 720-1500	info.MagneticSoftwareLtd@demosagecrm.com	http://www.magnet.com	US East
The Software Forge Inc.	Boston	1 617 742-3677	info.TheSoftwareForgeInc@demosagecrm.com	http://www.swforge.com	US East

> The **Quick Look** tab shows you the most recent activities your organization has had with the company.

Basic search techniques

The following basic techniques get you started on carrying out searches in CRM:

- Repeating an earlier search
- Resetting search criteria
- Combining search criteria
- Wild card search
- Date field search
- Numeric field search

Repeating an earlier search

The Recent List displays the most recent information you've been working with. It’s a fast way to get back to your most frequently accessed customer information. You can use the icons on the Recent List headings to open the corresponding Find screen.

Resetting search criteria

When you perform a search in the normal way, that is, using the Find button and specifying search criteria, the Search Results page is displayed reflecting the criteria you specified. However, if you return to that same Search page any time during the same session, you will notice that the Search Results page you generated earlier remains on-screen. To clear the page and perform a new search:

1. From the Search Results screen, click **Clear**.
2. Specify new search criteria and click **Find**.

Combining search criteria

"I've got John from Global on the phone for you."

You probably have countless people called John and maybe a number of different company entries for Global. However, combining the two criteria narrows your search to show only people called John working at Global.

You can combine any number of criteria on a Find screen. This example shows you how to combine company name and person name search criteria.

1. Click **Find | Person** .
2. Enter the person name or part of the name in **Last Name**, and the company name in **Company Name**.
3. Click **Find**.
4. Click the person link that you want to drill down on.

Wild card search

To use a wild card search, enter % before the value in a field on the Find screen. The returned matches contain this value. For example, enter *%software* in **Company Name** to return all companies containing the word *software*.

If you want to search for Sage CRM field values that contain the percent sign (%), you need to escape it in your search query by using the pipe (|). In this case, % is not perceived by Sage CRM as a search operator.

For example, to search for companies whose name contains %, enter the following text in the **Company Name** field on the Find screen:

```
%|%
```

Date field search

You can search by date on some entity Find screens. These steps search for leads created between two specified dates.

1. Click **Find | Lead** .
2. Select **Between** from **Created Date**.
3. Click the first **calendar** and select a date.
4. Click the second **calendar** and select a date.
5. Click **Find**.

> Your System Administrator can add date search fields to any Find screen in Sage CRM.

Numeric field search

You can search by numeric value if your System Administrator has added numeric fields to the entity Find 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.

Searching for a Person

You can search for a person by any criteria or combination of criteria on the Search screen. This example shows you how to search by Last Name.

1. Click **Find | Person**.
2. Type the last name, or part of the last name in the **Last Name** field.
3. Click **Find**.
   A list of people matching your search criteria is displayed.
4. Click the person you want to drill down on. This opens the selected person record and you now have access to all the person’s details.
5. For the fastest overview of recent activities your company has had with the person, click the **Quick Look** tab.

This shows you a recent lost sales opportunity and the last contacts your company had with her. You notice one of the last contacts shows she was implementing an internally developed software product. Now you know who she is and have a good idea why she might be calling.

Searching for a Company

You can search for a company by any criteria or combination of criteria on the Find screen. This example shows you how to search by Company Name.

1. Click **Find | Company**.
2. Enter the company name or part of the company name in **Company Name** and click **Find**.
   A list of companies matching your search criteria is displayed.
3. Click the company you want to drill down on. This opens the selected company record and you now have access to all the company’s details.

The **Quick Look** tab shows you the most recent activities your organization has had with the company.

4. To find a full listing of all the people you work with at Design Right, click the People tab.

Finding an Opportunity

The fastest way to locate details associated with a sales opportunity is to find the Opportunity record. You can search by reference number or company name.

1. Click **Find | Opportunity**.
2. Enter search criteria and click **Find**.
3. Click the opportunity link.

Finding a Case

"This is Arthur from Design Right. I'm still waiting to find out why the Setup isn't working on the TimEx Enterprise software. Can you tell me what the status is? The case reference ID is 0-20."

Even though you may not be handling this case, you can still give the customer a status and follow-up if necessary.

1. Click **Find | Case**.
2. Enter search criteria and click **Find**.
3. Click the Case link.
   The Case Summary page displays an overview of the case. A quick look in the **Communications** tab shows if the person handling this case has scheduled any follow-up action.

Using Advanced Find

You can use the Advanced Find feature to perform complex database searches. Advanced find searches can be based on any of the main CRM entities - these are Case, Communication, Company, Lead, Opportunity, Order, Person, Quote, and Solution.

Advanced Find allows you to create enhanced searches based on a WHERE clause, and the criteria for selection can be extended using the AND and OR clauses. For example, you might create an Advanced Find search for all companies WHERE the city equals Chicago AND the number of employees is over 1000 OR the annual revenue exceeds $10 million.

While creating an Advanced Find search you can click the Preview SQL button at any time to review the SQL query behind your search.

If you're a System Administrator, two extra buttons are displayed with the results of an advanced find - Mass Updates and Update Territory. Please refer to Performing a mass update on a group (page 17-7) for more information on Mass Updates, and Updating group territories (page 17-8) for information on Updating Territories.

For information on saving Advanced Find search criteria, please refer to Creating a saved search (page 3-11). For information on creating a new group based on the results of an advanced find, please Creating a group based on a primary entity search (page 17-5).

Example: Searching for Companies using Advanced Find

Say you would like to see a list of all customer or prospect companies in the United States.

To search using advanced find:

1. Click **Find | Advanced Find**.
   The Advanced Find page opens.
2. Click the **Clear** button to clear your last search from this page.
3. Click **Company** from the **Entity** drop-down list.
4. Click **Address: Country** from the **Field Name** drop-down list and then click **Add**.
5. Click **Company: Type** from the **Field Name** drop-down list and then click **Add**. Then repeat this action to add a second Company: Type field. You have now added the fields on which

your search will be based. You must now set up the values for the selected fields and the relationships between those fields.

6. For the Country field, select the **equals** operator, and select **United States** from the Value drop-down list.
7. Click **And** from the And/Or drop-down list.
8. For the first Company: Type field, select the single opening bracket from the (drop-down list. Brackets must always enclose an Or statement. In this example, you will be searching for companies that are either customers or prospects, so you will enclose these two search terms within single brackets.
9. Click the **equals** operator and select **Customer** from the Value drop-down list.
10. Click **Or** from the And/Or drop-down list.
11. For the second Type field, select the **equals** operator and select **Prospect** from the Value drop-down list.
12. Click the single closing bracket from the) drop-down list.
13. Click the **Find** action button or press Enter. A list of all companies matching your search criteria is displayed.

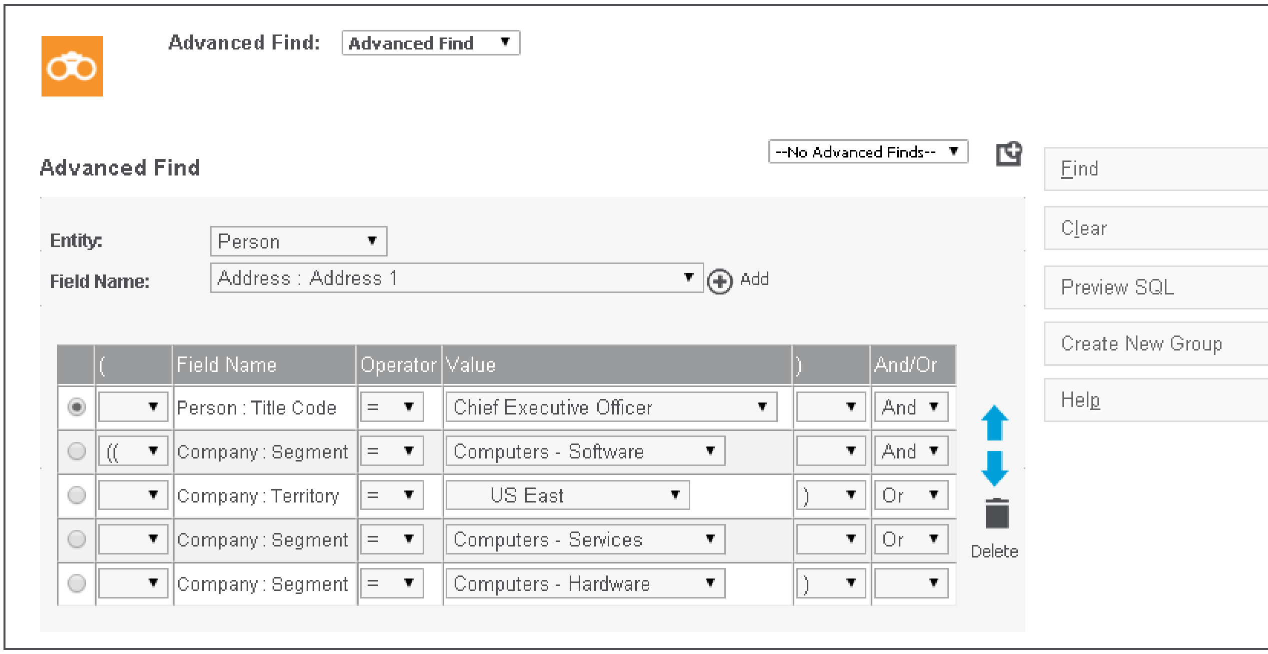
Example: Searching for People using Advanced Find

You would like to see a list of people where the Person Title Code is Chief Executive Officer and the Company Sector is either Computer Software, Computer Hardware, or Computer Services. For the CEOs in the Computer Software Sector, you only want to see people where the Company Territory is US East.

To search for people using Advanced Find:

1. Click **Find | Advanced Find**.
   The Advanced Find page opens.
2. Click the **Clear** button to clear your last search from this page.
3. Click **Person** from the Entity drop-down list.
4. Select **Person: Title Code** from the Field Name drop-down list and click the **Add** button.
5. Select **Company: Segment** from the Field Name drop-down list and click the **Add** button. Then repeat this action to add a second and a third Company: Segment field.
6. Select **Company: Territory** from the Field Name drop-down list and click the **Add** button.
7. Click the radio button next to the Company: Territory, and use the arrow buttons to move the position of this field up until it comes after the first Company: Segment field.
8. For the Title Code field, select the **equals operator** and select **Chief Executive Officer** from the Value drop-down list.
9. Select **And** from the **And/Or** drop-down list.
10. For the first Company: Segment field, select the double opening bracket from the (drop-down list, select the equals operator, and select **Computers - Software** from the Value drop-down list.
11. Select **And** from the **And/Or** drop-down list.
12. For the Company: Territory field, select the equals operator, then select **US East** from the Value drop-down list. Select the single closing bracket form the) drop-down list.

13. Select **Or** from the **And/Or** drop-down list.
14. For the second Company: Segment field, select the equals operator, and select **Computers - Services** from the Value drop-down list.
15. Select **Or** from the **And/Or** drop-down list.
16. For the third Company: Segment field, select the equals operator, and select **Computers - Hardware** from the Value drop-down list. Select the single closing bracket form the) drop-down list.



Advanced Find: Advanced Find

Entity: Person

Field Name: Address : Address 1

	(	Field Name	Operator	Value	)	And/Or
●		Person : Title Code	=	Chief Executive Officer		And
○	((	Company : Segment	=	Computers - Software		And
○		Company : Territory	=	US East	)	Or
○		Company : Segment	=	Computers - Services		Or
○		Company : Segment	=	Computers - Hardware	)	

Advanced Find search criteria

17. Click **Find**.
    A list of all people matching your search criteria is displayed.

Note: When building an advanced find with multiple search criteria, it is recommended you save the search as soon as the search results are displayed. You can always go back and delete the search later if it is no longer required, but you will lose the search if you log off the system. For more information on saving search results please refer to "Saving Search Criteria" in this chapter.

Using Keyword Search

Using Keyword Search, you can perform a search across all text fields on any of the main CRM entities (Case, Communication, Company, Lead, Opportunity, Order, Person, and Quote) by typing key terms in a search field. You can perform a keyword search directly from an **entity Find page**, or you can right-click the **Find menu button** and click Keyword Search to open the Keyword Search page. Keyword search is also available from all **Advanced Search Select** pages.

When you carry out a keyword search on, for example, Cases, the keyword is searched for not only in Cases, but also in entities associated with the case, for example, Companies, Persons, Addresses, and Progress Notes. When the keyword search is carried out from the Keyword Search page, you have the option to perform the keyword search across **multiple entities** at one time. For more technical information on keyword search views, please refer to "View Customization" in the *System Administrator Guide*.

The CRM keyword search function uses an "**any words**" search technique. An any words search returns records containing all of the words listed in a search term once those words appear in the record text fields or in the text fields of any associated entity record specified in the keyword search view. 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 further refine your keyword search by combining it with other criteria from the standard Find page. For example, you can perform a keyword search using the search term **Murphy** and refine this search using **Ireland** from the Territory drop-down field on the Find Person page. This means that a person keyword search is carried out on the term “Murphy” but only those records that have a matching “Ireland” territory are returned in the search list.

You can use a keyword search on an entity Find page to further refine the search results. If you enter a keyword search term and a value for a standard search field, an initial search is performed using the keyword search term. The search results are then filtered using the values in the standard search fields.

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.

When performing a keyword search, it may sometimes be the case that you know part of the term you want to search on. 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. A variety of **special characters** can help you narrow your search results in such circumstances:

Character	**Usage**
* %	A * or % can be placed at any position in a word and matches any number of characters. Both the * and % perform exactly the same action. For example, ***ope*** would match Europe, open, and so on. Note: You should take care to leave a space between words when using these characters with multi-word search terms.

Character	**Usage**
Quotation marks	To search for a phrase, place it in quotation marks. For example, a search for **"software services"** will return all records containing the phrase software services. Punctuation marks are treated as blank space. So, for example, a search for **"(1451) 4579937"** would search for two text strings, 1451 and 4579937.
?	A ? can be placed at any position in a word and matches any single character. For example, **Americ?** would match America, but not American. However, you could use Americ?? to return all words containing Americ and two characters after it.
=	A = can be placed at any position in a word and matches any single digit. For example, **B==** would match B12, but not B123.
#	The # must be placed at the start of a word and will return all words that start with the same letter and sound like the word you're searching for. For example, **#smith** will return smith, smithe, and smythe. **Note:** The # can sometimes be over-inclusive. For example, in the example above, it might also return words like smart, smoke, and smell.
~~	The ~~ symbols allow you to search within a numeric range. To perform a numeric range search, you enter the upper and lower bounds of the range separated by ~~. For example, **10~~20** will return all numbers between 10 and 20. **Note:** Numeric range searches work with positive numbers only, and decimal points, and commas are treated as spaces, while minus signs are ignored.

Character	Usage
+ -	Place + in front of a word that is required in your search or - in front of a word that you want to exclude. For example, if you wanted to return all records containing the word software in association with the word services, you could use the search term **software +services**. However, if you wanted to return all instances of software except those that are associated with services you could use the search term **software -services**.

See Searching Using Keyword Search (page 3-10) for an example of how keyword search can be used to perform a search in CRM.

Searching Using Keyword Search

Example: Searching for a Person using Keyword Search

You're a new Sales Representative with Panoply Technologies and you have heard that one of Panoply's existing customers has put out a tender for software services. You know that the company name contains the word healthcare and that the name of the person to contact has either a first or last name starting with dav. With this information, you should be able to narrow down your search for the appropriate contact person using a keyword search.

To perform a keyword search:

1. Click **Find | Keyword Search**.
   The Keyword Search page is displayed.
2. Type **dav%** and **healthcare** in the **What Would You Like To Search For?** text field.
3. **Note**: You can click the question mark button next to the Keyword Search field to view some examples of how to use keyword search.
4. You can select a specific entity check box to restrict your search to that entity. Alternatively, you can specify that all primary entities should be searched by selecting the Select All check box. For this example, select the **Person** entity check box to limit your search to that entity.
   Note: If you do not select any check box, no records are returned.
5. Click **Find**. Your search results are displayed.
   Note: If the records found cannot all be presented in the initial list of results, you can click the hyperlink in the Results panel or on the **View All** link that will be displayed under the results list to view the full search results.

Example: Searching for a Keyword across all Main Entities

You're the new Training Manager in a company. You want to review all customer contact history (Cases, Communications, Opportunities etc.) where Training has been discussed.

To carry out a keyword search for the keyword "training" across all main entities:

1. Click **Find | Keyword Search**.
   The Keyword Search page is displayed.
2. Type **training** in the **What would you like to search for?** field.
3. You can select a specific entity check box to restrict your search to that entity. Alternatively, you can specify that all primary entities should be searched by selecting the Select All check box. For this example, select the **Select All** check box to search across all main entities.
   Note: If you do not select any check box, no records are returned.
4. Click **Find** . The search results are displayed.

Note: If the records found cannot all be presented in the initial list of results, you can click the hyperlink in the Results panel or on the View All link that will be displayed under the results list to view the full search results.

Working with saved searches

To make searching easier, you can use predefined saved searches or save your own search criteria to use again later.

- Using an existing saved search
- Creating a saved search
- Updating a saved search
- Deleting a saved search

Using an existing saved search

There are a number of predefined saved searches available within different Find screens that you may find useful. For example, the My Companies saved search—available from the Find Company screen—is set up to return a list of all of the companies assigned to you. The My Cases In Progress saved search—available from the Find Case screen—returns all the active cases currently assigned to you.

1. Click **Find | <Entity>** .

   The selected saved search list is displayed.

Creating a saved search

You can save the search criteria that you use to search for Companies, People, Opportunities, Orders, Quotes, Cases, Solutions, Leads, or Communications.

Note: You cannot create a saved search based on a keyword search.

You can save an advanced find search in the same way as you would any other search. However, only a System Administrator or Info Manager can make an advanced find search available to other users.

You can create a group to save search criteria. For more information, see Creating a group (page 17-2).

1. Click **Find | <Entity>** .
2. Enter your search criteria and click **Find**.

3. Click the **New Search** icon .
4. Enter the name of the new saved search. For example, San Francisco Companies - 21 - 50 Employees.
5. To share the saved search, select **Available to all Users**. Only System Administrators and Info Managers can share saved searches.
6. Click **Save**.

Updating a saved search

You can edit your saved searches.

1. Click Find and click the entity that contains the saved search.
2. Select the saved search from **Saved Search**.
3. Select your new search criteria and click **Find**.
4. Click the **Update Search** icon and change the name of the saved search if required.
5. Click **Save**.

Deleting a saved search

You can delete saved searches that are no longer useful to you.

1. Click **Find** and click the entity that contains the saved search.
2. Select the search from **Saved Search**.
3. Click the **Delete Search** icon beside **Saved Search**.
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. Actions available are:

- To create a merged document for all contacts contained in your list, 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 export your list of contacts and contact details to a spreadsheet or text file, click **Export to File**. You must have appropriate rights to do this.
- To create a new task with the same details for each contact on your list, click **New Task**.
- To create an email with merge fields, which can be sent to each contact on your list, click **New Email**. You must have appropriate rights to do this.

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 with a status of Pending. This filter applies to all Company Communications lists until changed or until you log out.

Sorting records in a list

You can change the sort order of any list that includes an underlined column heading. This example changes the sort order of the Calendar list from Date/Time to Action type.

1. Click the **My CRM | Calendar** tab.
2. Click **List View**.
3. Click the **Action** column heading. The Calendar list is sorted by Action. The triangle next to the column heading indicates the column by which the list is currently sorted.
4. To change the sort order back to Date/Time, click the **Date/Time** column.The Calendar list is sorted by Date/Time with the most recent pending communication first.To change the sort order to ascending, click the **Date/Time** column again.

Setting the size of the search results list

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

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

Setting a default Find screen

You can specify the Find screen that appears at the beginning of a session. The system remembers your last Find, until you change it. For example, you could set your default Find screen to be

Company. However, if you search by Person, the next time you press Find, the Person Find screen is displayed.

1. From **<My profile> | Preferences**, click **Change**.
2. Select a default Find screen from **My default Find screen**.
3. Click **Save**.

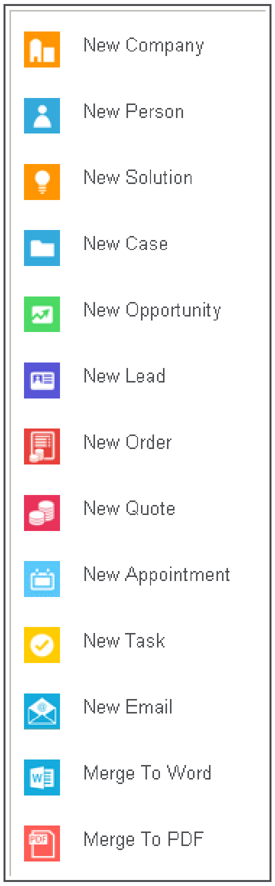
Chapter 4: Adding customer information

- Use the New menu button
- 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

Pop Out List or Menu Button with Context Area

You can add new information by:

- Clicking the **New** icon in the top right corner of the screen. Then, select the type of record you want to add, for example, Person, Case, or Opportunity:


New Company
New Person
New Solution
New Case
New Opportunity
New Lead
New Order
New Quote
New Appointment
New Task
New Email
Merge To Word
Merge To PDF

- Using 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.

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 (page 4-14). 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.

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—please refer to Cases (page 20-1). 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. Please see Territory management (page 4-6).
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.

Field	Description
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 uncheck 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
Modem	Modem number
Toll Free	Toll free number

Field	Description
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. Please see Territory management (page 4-6).
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 check or uncheck 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 an arrow or **X** beside them.
2. Complete the required fields and correct any entries in the wrong format.
3. Click **Save**.

Icon	Description
⬅	Required. You must enter information in fields containing a red arrow
☒	Incorrect format. Entries that are incorrect, such as dates in the wrong format, are highlighted with an X.

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 and**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, please see Preventing duplicate entries (page 4-14). 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

User Requirement: 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 Stree 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. Select **Find | Company** and click the company name.
2. Click the **Addresses** tab. This displays a list of all company addresses.
3. Add a new address. The new address is displayed in the **Company Addresses** tab.
    - The **Link Status** icon shows a status of **single-linked**. If the company address you're about to change is linked to existing contacts, it shows as **multi-linked**.

      Single-linked

      Multi-linked

    - A Link Status icon showing a status of single-linked in the context of a Person means that the address is associated with the current person only, but not with other contacts or with the company. For example, a home address.
4. 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. This 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. This shows if the current address is set as the main address of the company or of the contact people.
5. Click the pencil 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.
6. 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.

> 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.

7. Click **Save**, and then **Continue**.

The list of Addresses is displayed. The Link Status icon shows a status of multi-linked. 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.

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 run reports and create reports about the information in the Relationships tab. You can also display relationship information on your 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.

Field	Description
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. You can add a new note or edit an existing note by clicking the Maintain Relationship pencil icon and clicking 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, please refer to Preventing duplicate entries (page 4-14). If no potential duplicate person is found, the New Person page is displayed.
4. Fill in the relevant details.

> Leave the **For** panel blank if you don't want to associate this person with a company.

5. Click **Save**. You can add notes, addresses, phone, and email information for the person, using the different tabs.

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

Please note you can't 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 (page 4-8).

Merging duplicate people

User Requirement: Your System Administrator must give you rights to delete. 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. Check the **boxes** 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

User Requirement: System Administrator or Power User rights

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.
  - Open the Company **Summary** page.
  - Click **Change**.
  - Select **Inactive** from **Status.**
  - Click **Save**.

Chapter 5: Appointments and tasks

- Creating a task
- Creating an appointment
- Scheduling a callback
- Communication fields and icons
- Scheduling unlinked communications
- Scheduling a quick appointment or task
- Notifications
- Changing the status of a communication
- Finding a communication
- Adding attachments to tasks
- Reassigning an existing task to a colleague
- Scheduling a task for a colleague
- Checking a colleague’s calendar
- Navigating your calendar
- Meeting planner
- Reviewing contact history
- Inviting external attendees to a meeting
- Recurring appointments
- Deleting a communication
- Synchronize my CRM and Outlook calendars

Creating a task

1. Click **New | New Task**.
   You can also click **New Task** from the calendar area.
2. Enter the details on the page.

   > The time and date fields under **Due Date/Time** are automatically populated with the current date and a time 30 minutes into the future.

3. Click **Save**.

Creating an appointment

1. On the **My CRM | Calendar** tab, click **New Appointment**. Alternatively, click **New | New Appointment**.

2. Fill in the details of the appointment. Use the **Regarding** panel to link the appointment to an existing company and person.
3. Ensure your name is selected from the list of users, and click **Save**.

Scheduling a callback

Following an internal meeting, you're asked to make contact with a potential business partner. You receive information that the managing director is away at a conference. The call would be best timed after his return a week from today. You want to capture this information as quickly as possible and then move on to other tasks at hand until the call is due.

1. Click **Find | Person**.
2. Type the name of the person and click **Find**.
3. Click the person you want to schedule the callback with.
4. Click **New | New Task**.
   Alternatively, you can click **New Task** from **My CRM | Calendar**. The difference is that you then need to find the person you're scheduling the communication with, using the Regarding panel.
5. Enter the details and click **Save**.

Communication fields and icons

A communication can be a task or an appointment.

- Regarding panel
- Details panel
- Scheduling panel
- Meeting Planner panel
- Follow-up panel
- Campaigns panel
- Action type icons
- Status icons
- Priority icons

Regarding panel fields

Field	Description
Company	The company you're communicating with. If linked, you can jump to the related Company record.
Person	The person you're communicating with. If linked, you can jump to the related Person record.
About	The related opportunity or case. If linked, you can jump to the related Opportunity or Case.

Details panel fields

Field	**Description**
Action	The type of task, for example, Phone Out.
Subject	Subject of the communication.
Location	Appointments only. Location of the appointment. You can add a Resource user, for example, London meeting room. If you've already typed some text, the resource user is added afterward, after a semi-colon.
Details	A summary of the task.
Status	Status of the communication. For example, planned, complete, or canceled.
Priority	Priority of the task. For example, high, medium, or low.
Territory	Security territory of the communication. For more information, see Territory management (page 4-6).
Private	Select this checkbox if the task should only be viewed by the assigned user.
Created By	Once your save the communication, this displays the user who created it.
Created Date	Once you save the communication, this displays the creation date.
Percent Complete	This tracks the progression of a task. If you work only in Sage CRM, this displays either 100% when the task is complete, or 0% if the task is canceled. If your tasks are synchronized from Outlook, the field displays the value set in Outlook (any value from 0% to 100%).
Completed Time	This records the time and date at which a communication was completed. When you insert or update a communication, these rules for **Completed Time** apply : If the status is not complete ,then the completed time is set to blank. If the status is complete ,then the completed time must be filled in. If you don't fill it in (or leave it blank), then it is set to current time.

Field	Description
Organizer	If **Exchange Integration** is enabled, this field is only displayed for appointments. You can edit it when creating an appointment in Sage CRM. It defaults to the user creating the appointment, but can be changed. This is a mandatory field. If Exchange Integration is **not** enabled, this field is read-only, and is displayed once you save the communication. It shows the name of the communication organizer. If the communication is created in Sage CRM, the field displays the same name as the Created By field. If an appointment is created in Classic Outlook integration, and then synchronized with Sage CRM, this field shows the name of the meeting organizer. If the Classic Outlook meeting organizer is not a Sage CRM user, then their email address is displayed.

Scheduling panel fields

Field	Description
Due Date/Time	Date the task must be completed by. This appears in all Sage CRM Communications lists and determines where the task appears in the Tasks panel of your Calendar View. When you add a due date/time, the Onscreen Reminder field is enabled, and the reminder date/time set to the same time as the due date/time.

Field	**Description**
User	The person who is responsible for executing the task. If Sage CRM system has less than ten users, this field is displayed as a list. You can select several users at the same time by using the mouse and holding **CTRL** key. If Sage CRM has more than ten users, use the Search For field to find users more easily. You can select several users at the same time by using the mouse and holding the **CTRL** key. Click **Add** to assign them to the task or meeting. **Note**: When you add more than one user to a task, you're creating multiple tasks.
Start Date/Time	Date/time the task is active from. Used in Outlook if you're filtering tasks by the active date and time.
Onscreen Reminder	This field is implementation dependent and may have been switched off by your System Administrator. Select this checkbox to get an onscreen reminder for the task.
Reminder Date/Time	Date/time of the reminder. Defaults to the due date/time.
Send Reminder Message	If the Onscreen Reminder field is enabled, select this checkbox to receive the reminder in different formats depending on the priority of the communication. The different formats and priorities are set up within Preferences. For more information, see Preferences (page 24-1).
Team	The team the task is assigned to.

If the new communication is an appointment, the **Scheduling** panel includes the additional fields described below.

Field	**Description**
Date / Time	Start date and time of the appointment. Defaults to the current date/time.

Field	Description
End Time	End date and time of the communication. Defaults to half an hour after the Date/Time.
All Day Event	Select this checkbox to make the appointment an all-day event. The date/time and end time date become read-only and the appointment is set to last from 00:00 to 11:59 pm (23:59) the same day. When viewed in the Calendar, an all-day event appointment is prefixed with "All Day Event".
Reminder	Select the length of time from the list. This is the length of time prior to the meeting taking place that you receive a reminder.
Recurrence	Click this to make an appointment a recurring event. For example, you can set up a team meeting every Monday at 10.00 AM.

Meeting planner panel

The **Meeting Planner** panel is displayed on all appointments (communications where the Action field is set to Meeting). It is not displayed for recurring appointments or tasks.

Follow-up panel fields

Field	Description
Create Follow-up Task	Select this checkbox to create a new task based on the current information, immediately after saving the current task.
Create Follow-up Appointment	Select this checkbox to create a new meeting based on the current information, immediately after saving the current task. The Create Follow-up Task and Appointment checkboxes cannot be checked at the same time
Create Follow-up Opportunity	Select this checkbox to generate a new opportunity based on the current information. This is only displayed when editing existing communications.
Send SMS Message Immediately	If SMS messaging is enabled by your System Administrator, select this option immediately to notify the user(s) assigned to the task or meeting.

Campaigns panel fields

To link the communication to a marketing campaign, click **Show Campaigns**.

Field	Description
Wave Activity	Search and link the communication to a campaign wave activity. If the communication is scheduled within the context of a wave activity, the wave activity is read-only.
Response Type	Once the communication is linked to a wave activity, you can select a response type.

Communications generated within the context of a campaign are automatically linked to a wave activity. When edited, the Campaigns panel is immediately displayed. For more information, see Campaign management (page 18-1).

Action type icons

Icon	Action
☀	Vacation
☎➡	Phone Out
☎⬅	Phone In
✉➡	Letter Out
➡✉	Letter In
✉➡	Email Out
➡✉	Email In
📠➡	Fax Out
➡📠	Fax In

Icon	Action
👥	Meeting
🖥	Demo
✓	To Do

Status icons

Icon	Status
✓	Pending
➡	In Progress
✓	Complete
⊗	Canceled

Priority icons

Icon	Priority
⬆	High
⊖	Normal
⬇	Low

Scheduling unlinked communications

You can create new tasks and appointments, which are not linked to a company or person. This commonly occurs with internal communications.

1. On the **My CRM | Calendar** tab, click **New Task**. The Enter New Task page is displayed.
2. Fill in the details. Leave the Regarding panel blank.
3. Ensure that your name is selected from the list of users.
4. Click **Save**.

Scheduling a quick appointment or task

Some appointments or tasks don't have to be linked to Person or Company records.

To create a quick appointment:

1. Click the **My CRM | Calendar** tab. If you're in List View, click **Calendar View**.
2. Type a few key words in the **Quick Appointment** field at the top of the Calendar panel.
3. Select the **time** and approximate **duration** from the next two fields.
4. Click **Quick Appointment**.. **Note:** When you create a quick appointment in Day view, the appointment is scheduled for the day you're looking at, not for the current day.

To create a Quick Task, repeat the steps described above using **Quick Task** at the top of the Tasks panel.

Notifications

Notifications are usually reminders for tasks or appointments.

- The number of notifications you have is displayed on the Notifications icon on the Top Bar.
- To display a list of outstanding notifications, click the **Notifications** icon on the Quick Access bar.
- To clear a single notification reminder, click the close icon next to the notification.
- To snooze a single notification reminder, click **Snooze For** next to the notification and choose a snooze duration.
- To dismiss all notifications, click **Clear All** or **Snooze For All**.

Changing the status of a communication

Depending on your access rights, you can change the **Status**, **Team**, **Territory**, and **Regarding panel** fields for a task.

1. Open your Calendar.
2. In List view, click the action icon for the task. The Task Synchronization Management Fields Details page is displayed.
3. In Calendar view, click the Pending status icon. The status is automatically changed to Complete and the Task Details page is displayed.
4. As you're making the call, you can add notes to **Details**.
5. When the call is completed, select **Complete** from **Status**.
6. Check the follow-up boxes if required.
7. Click **Save**. The Calendar page is displayed.

The completed task no longer appears in your Calendar. It's saved in the Communications tab of the Person with whom the call was scheduled, forming part of the customer history.

> Tasks are rolling in Sage CRM; a task stays in the Tasks panel of your calendar until it's completed. Appointments are not rolling; an appointment stays in your calendar on the

date and time scheduled. For more information, see Navigating your calendar (page 5-11).

Finding a communication

1. Click **Find | Communication** .
2. Enter your search criteria.
3. Click **Find**. A list of results is returned.

Adding attachments to tasks

1. Find and open an existing task, or create a new task.
2. Click **Add Attachment**. If you're creating a new task and have not yet saved it, you are prompted to do so.
3. From the Attachments tab, click **Add File**. You can also drag and drop the attachment(s) to the **Drop files here...** area (not available on Internet Explorer).
    - In IE, click **Browse** to navigate to the file.
    - In other browsers, select the file(s) you want to add. A list of the file(s) you have attempted to upload is displayed. The green check mark and red cross icons indicate whether the files uploaded or not. To upload successfully, the files must comply with the system file size, type, and number of files settings. These are defined by your System Administrator.
4. Click **Save**. You can use **Add File** to attach more files to the task.

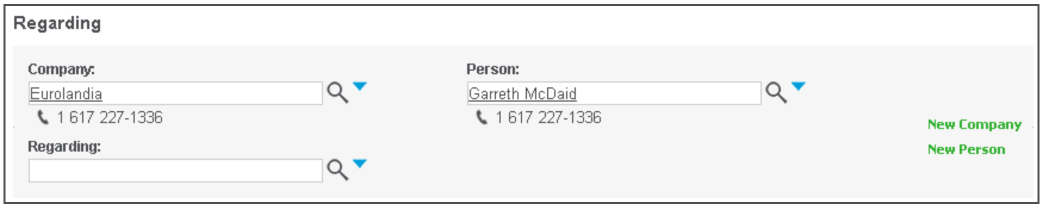
To view a file you've already attached, click the **paperclip** icon next to the attachment, or drill into the attachment and click **View Attachment**. All files attached to a task in the context of an entity (Company, Person, Opportunity etc) are also saved as entries in the **Documents** tab of that entity.

Reassigning an existing task to a colleague

1. On your **Calendar** tab, click the **Action icon** of the task. The Task page is displayed.
2. Select the name of your colleague from **User**.
3. Click **Save**. The task is now displayed in your colleague's **Calendar/Tasks** tab.

Scheduling a task for a colleague

1. Click the **My CRM | Calendar** tab.
2. Click **New Task**.
3. Use the **Search Select** buttons to link the task to a company and person in the **Regarding** panel.



Company: Eurolandia
☎ 1 617 227-1336
Regarding:
Person: Garreth McDaid
☎ 1 617 227-1336

Regarding panel

4. Add in the task details,and select your colleague from **User**.
5. Click **Save**.
    - The new task is displayed in the Communications tab of the company and person selected, and in the Calendar tab of the assigned user.
    - **Created By** indicates who scheduled the task.

Checking a colleague’s calendar

If you've appropriate security rights, you can check a colleague’s calendar.

To check your colleague’s calendar using the Calendar tab

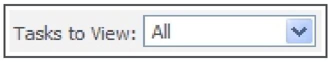
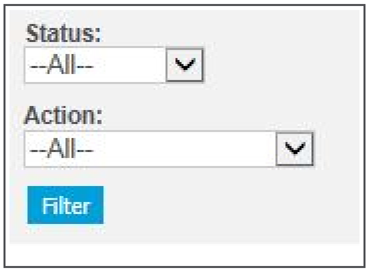
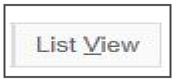
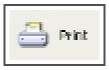
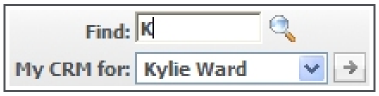
1. Click the **My CRM | Calendar** tab.
2. Type the first few letters of the user’s name in the **Find** field in the context area .
3. If there is more than one match, click the name from the **My CRM For** list. Otherwise, the name appears in the My CRM For field automatically.
4. Click the **right-pointing** arrow beside the **My CRM for** field. Your colleague’s calendar is displayed.

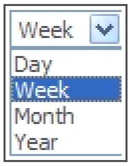
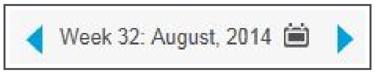
To check a colleague’s calendar while you're scheduling an appointment

1. Begin creating the appointment in the normal way.
2. Review the **Meeting Planner** panel on the Enter New Appointment page.
3. Any conflicts with the current meeting are highlighted in red. Hovering over the overlap shows the details of the meeting.
4. After you have made adjustments, save the appointment in the normal way.

Navigating your calendar

Graphic	Description
	To create a new appointment, click **New Appointment**.
🕒	To create a quick unlinked calendar entry, enter a few key words , select a time and approximate duration, and click Quick Appointment .
📌	To create a new task, click **New Task**. For example, a call back you need to make.

Graphic	**Description**
	To create a quick item in your task list for the day, enter a few key words, and click **Quick Task**.
	To create and send an email, click **New Email**.
 Tasks to View: All	To reduce or expand the your list of tasks that's displayed, select a duration from **Tasks To View**. You can toggle overdue tasks on or off. Overdue tasks are highlighted in red.
 Status: --All-- Action: --All-- 	By default, the Filter Box shows all Pending appointments and tasks. You can change this to show Canceled, Complete, or All types of Status. When you change filter settings, remember to click **Filter**.
 	To display the list view of the Calendar/Tasks page, click **List View**. When you're in the list view, and want to display the calendar view, click **Calendar View**.
 	To print all appointments and tasks for the daily or weekly calendar view, and all overdue tasks, click **Print**.
 Find: K My CRM for: Kylie Ward	If you have access, you can click another user's name within My CRM to view their calendar. To switch back to your own calendar, click your name from the context area of the screen. The My CRM For field is always available in this context. The Find field is available only when there are more than 10 users in the system.

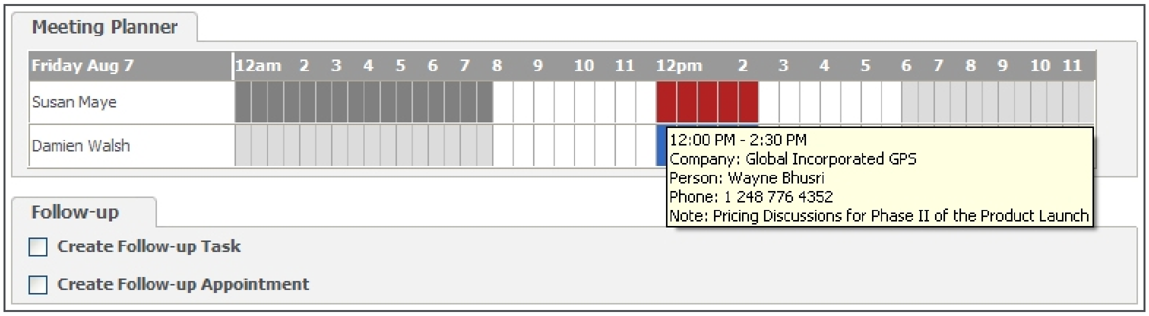
Graphic	Description
	Use the **View By** list at the top of the Calendar panel to switch between daily, weekly, monthly, and yearly views of your calendar. You can customize your daily view in **<My Profile> | Preferences**. For more information, see User preferences (page 24-1). **Note:** The monthly and yearly calendar views need more space to be displayed. If you select either of these options, the Tasks panel isn't displayed. Tasks are displayed on the Monthly and Yearly calendars.
	Use the date display at the top of the Calendar panel to navigate forwards and backwards from the current date. To select a specific date, click the calendar icon. **Note:** Changing the date display on the Calendar panel affects the view of your appointments in your calendar. The tasks that you can view are determined by the settings at the top of the Tasks panel. To display daily view of your calendar for today, click **View Today** . You can reschedule appointments in your calendar by drag-and-drop. Select the communication icon and drag the appointment to a new time or date. Gray shading indicates the current time, date or week in the daily, weekly, and monthly calendar views respectively.

Meeting planner

To speed up the planning process, a meeting planner tool is available on the **Enter New Appointment** page.

You can schedule a meeting and invite your colleagues.

1. Go to **Calendar**, and click **New Appointment**. Your user name is already selected as an attendee in the meeting planner.
2. Link the meeting to a person in Sage CRM. To invite colleagues, search for the names in the **User** field and click **Add**. They are displayed in the meeting planner. Conflicts with the current meeting are highlighted in red. Hover over the overlap to see more details of the meeting.



12:00 PM - 2:30 PM
Company: Global Incorporated GPS
Person: Wayne Bhusri
Phone: 1 248 776 4352
Note: Pricing Discussions for Phase II of the Product Launch

☐ Create Follow-up Task

☐ Create Follow-up Appointment

Meeting Planner showing overlapping meetings

2. When you've filled in the relevant details for the communication, click **Save**. In the Team CRM calendar, an appointment icon is displayed for each invited user.

You can't create meetings which last more than 24 hours.

Reviewing contact history

If you want to find out what contact your company has had with a particular company or person, you can investigate it in a number of ways.

- With the company or person **Quick Look** tab selected, review your recent history with this company or person at a glance. The Quick Look tab lists the most recent communications, cases, and sales opportunities linked to the company or person.
- With the company or person **Summary** tab selected, run a Company or Person Summary report to review a quick overview of account information in PDF format.
- With the company or person **Communications** tab selected, review the list of communications your company has had with the company or person.

Inviting external attendees to a meeting

The External Attendee tab is displayed when editing an existing appointment in CRM. It shows everyone who has been invited to the meeting, who is not a CRM user. This can include people who are at the same company that the appointment is about, an external consultant, or even colleagues who are not CRM users. If the External Attendees tab contains any people, then a small person icon is displayed on the External Attendees tab.

The **Regarding** panel of an appointment lets you link the appointment to the **main** company, person, and opportunity (or quote, order, or case) that the meeting is about. This displays the appointment in the Communications list of the selected company, person, and opportunity (or quote, order, or case), thereby keeping track of valuable customer history and planned actions.

Regarding is not the same as Invited. People invited to the meeting, who are not CRM users, should be represented in the External Attendees tab

The **User** field on the Scheduling panel lets you link the appointment to other CRM users. This displays the appointment in each of their calendars, ensuring accurate scheduling for everyone involved.

The **External Attendees** tab:

- Lets you link **multiple people** to the appointment from within CRM. These people can work at the same Company set in the Regarding panel on the appointment, or they may be from other companies, or individuals with no company affiliation.
- Lets you view the appointment in the **Communications** list of each person from the External Attendees tab, as long as they exist in CRM. Again, this keeps that vital customer data up-to-date.
- If you're working with **Exchange Integration**, and create the appointment in **CRM**, each person on the External Attendees tab with a valid email address, is sent a **meeting invitation**.
- If you're working with **Exchange Integration**, and create the appointment in **Exchange**, each person who has been invited is displayed in this tab. This includes contacts who are **not** in the CRM database, and colleagues, who are **not** CRM users. For the last two types of contacts mentioned, just their email address is displayed is the list. No linked contact or communication is displayed anywhere else in CRM.
- Shows the **response** to the meeting invitation from **Exchange**.

Please refer to the Appointments: Exchange to CRM (page 7-6) section in Exchange Integration for more information about how this feature works when Exchange Integration is being used.

Recurring appointments

The Recurring Appointments feature allows appointments (meetings) to recur based on a defined recurrence pattern.

Many companies have regularly occurring events, for example, an Engineering Department progress meeting on the first Monday of every month. Instead of having to manually enter each event, this can be done by creating the appointment once and setting up a recurrence pattern.

Find out more about recurring appointments in:

- Creating a recurring appointment
- Changing a recurring appointment
- Deleting a recurring appointment

Creating a recurring appointment

1. Click **New Appointment** from within the Person, Company, Lead, Opportunity, or Solution context.
2. Click **Recurrence**.
3. Set the **Recurrence Pattern** to Daily, Weekly, or Monthly.

4. Select the **Daily Pattern** for each date in the series.
    - If you select **Occurs Once At**, only one communication is created for each date set up in the recurrence pattern.
    - If you select **Occurs Every**, several communications are created. Use **Starting At** and **Ending At** times to specify a range in which the communications will occur.

      Note: The **Occurs Every** option, is disabled if Exchange Integration is being used.
5. Select the **Start Date** and **End Date** for the recurring pattern of appointments.
6. Click **Continue** and then click **Save**.

> The default maximum number of occurrences is 200. This is set by your System Administrator. If you exceed the maximum number of occurrences, an error message is displayed and you can't save the appointment.

Changing a recurring appointment

1. Click the appointment icon. The text on the lower part of the Scheduling panel indicates the current recurrence status of the appointment.
2. To change the date or time or any of the recurrence details, click **Recurrence**.
3. When you've made your changes, click **Continue**.
4. You can edit other details of the communication, for example the attendees ,and decide if the changes apply to just one appointment or to all the recurrences for this appointment.
5. Click **Save**.
6. If you've made changes to the appointment, a dialog box opens and lets you apply your changes to **This Appointment Only**, **All Appointments In The Series**, or **This and Future Appointments**.

> You can turn existing non-recurring appointments into recurring appointments and vice versa.

Deleting a recurring appointment

If you've rights to delete communication records, you can also delete recurring appointments. You do this in the same way as non-recurring appointments.

When you select **All Appointments In The Series**, all recurrences of the appointment are deleted.

Deleting a communication

User Requirement: Your System Administrator must give you rights

You can change a communication status to Complete or Canceled. All communications, even those completed in the past, form an important part of the customer history.

1. Find and open the communication you want to delete.
2. From the Details page, click **Delete**. If the communication has attachments, for example an email or a letter, then they arealso be deleted, and no longer available in the **Documents** tab of the associated entity (Person, Company, Opportunity, etc.) **Note**: This does not apply to mass

mail communications deleted in the context of a recipient.

3. Click **Confirm Delete**.

Chapter 6: Email

- Sage CRM email
- Setting a default email template
- Sending an email
- Use 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.

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**.

Sending an email

You can specify that the email screen takes up the whole Sage CRM screen or is displayed in a new browser window. A new browser window lets you continue working in the system and write an email at the same time. For more information, see Preferences (page 24-1).

1. To open a new email:
    - Search for the customer you want to email and click the person’s email address.
    - Click any email address in the system.
    - Click **New Email** on the **My CRM | Calendar** tab.
    - Click **New Email** on any **Communications** tab.

2. Select a template from **Template** or use the default template to start a blank email. Sage CRM templates usually contain standard content and field codes. For more formatting layouts, click **Layouts**. To search a large number of templates, enter a template name and click **Go**.
3. **From** contains your email address by default.
    - If this field is set to **None**, the email comes from the user who's currently logged on.
    - If you have permissions to send emails from other accounts, select the addresses from this list.
    - If you've several account, you can change your default email address in **<My Profile> | Preferences | Default Email address**.
4. Select a **Reply To** address. This field is displayed only if you have permissions to send emails from other accounts.
5. Enter email addresses in **To**, and **CC** and **BCC** if required. To add Sage CRM users, select their name from the list of users and click **To**, **CC**, or **BCC**. You must add users one-by-one. If you're working in popup mode, find the person or company that you want to email and click their email address.
6. Type and format your message in the body section. You can include bullets and numbering, tables, text highlighting and color, HTML content, and inline images. For more information, see Sending mass emails (page 17-12).
7. To check the spelling of your emails, click **Check Spelling**. The spell check is carried out in your user language set in **Administration | Users**. Language dictionaries available include German, Spanish, French, UK English, and US English. If there's no spell checker dictionary available for your user language, US English is used.
8. To attach a shared document, use the Advanced Search Select icons to locate the file, select it, and click **Upload Attachment**. For more information, see Search Select Advanced (page 2-8).
9. To attach a local file, click **Browse**, navigate to the file, and click **Upload Attachment**. To remove the attachment, click **Delete**.
10. Make any changes required to the communication options.
11. Click **Send**. When the email is sent, it's saved as a communication for the person to whom it was sent and in your calendar. To view the email, click the Communications icon.

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 (page 6-1).

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.

If Email Management is installed, inbound emails are automatically filed against the matching Person or Company record. You can then convert the email directly to a customer service case using the workflow buttons on the right-hand side of the Communication screen.

1. Open the Email In/Out communication that was created when you sent or received the email.
2. Select **New Case**, **New Opportunity**, or **New Lead** from **Create**.
3. Enter the details of the Case, Opportunity, or Lead and click **Save**. The Case, Opportunity, or Lead is saved against the person or company you emailed.

Filing inbound and outbound emails

If the Outlook Plug-in 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 from Outlook to CRM (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

- Emails sent from Sage CRM, or from CRM using Send Using Outlook, are automatically BCCed to a Mail Manager Server Filing address.
  Note: In Sage CRM, this address isn't visible in the BCC field. To see if E-mail Management functionality is set up, click **Send Using Outlook**. The Mail Manager Server filing address is visible in the BCC field.
- 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 (page 6-4).

- 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:

Short cut	What it does
Shift + Click	Opens new email and puts addresses in **To**.
Ctrl + Click	Opens new email and puts addresses in **CC**.
Alt + Click	Opens new email and puts addresses in **BCC**.

Chapter 7: Exchange Integration

In this chapter you will learn how to:

- Understand how Exchange Integration works.
- Get started with Exchange Integration.
- Synchronize contacts.
- Synchronize tasks.
- Synchronize appointments.
- Understand stub appointments.
- Review Exchange Integration logs.
- Install the Outlook plug-in.
- Work with the Outlook plug-in.

What is Exchange Integration?

Sage CRM Exchange Integration is an integration between Sage CRM and the MS Exchange Server. There is no synchronization to individual Outlook clients. The synchronization runs in the background and does not require users to trigger synchronization - it continues even when Outlook clients are closed.

Appointments, Tasks, and Contacts can all be synchronized between Sage CRM and the MS Exchange Server. This means that the functionality is supported regardless of whether the user is working in **Outlook Web Access**, the **Outlook client**, or via a mobile device that connects to Exchange.The structure of Communications (Appointments and Tasks) in CRM even supports the more complex organizer / invitee features of Exchange.

There is a simple **plug-in** component which can, but does not have to be, installed on the client machine. This provides further functionality such as allowing users to file emails, and add new contacts to CRM from the Outlook client. This plug-in can be installed by the user or via an Active Directory Group Policy MSI install.

The synchronization direction, conflict resolution, and logging settings are all managed by the System Administrator, and can be customized to suit your organizations' needs.

Getting Started with Exchange Integration

Do I need to install anything to get Exchange Integration working?

No. Your System Administrator sets up the connection to Exchange, enables your mailbox for synchronization, and starts the synchronization process. Data then starts syncing between the selected mailboxes and CRM according to the sync options set up by the System Administrator.

The System Administrator can even automatically install the optional Outlook plug-in, which gives you some extra features. The plug-in can also be installed manually. Your System Administrator will advise you if you need to do this - it is a few simple steps, described here: Installing the Outlook Plug-in for Exchange Integration (page 7-7).

How do I know my mailbox is synchronizing with CRM?

- Your System Administrator has told you.
- You get a notification next time you log on to CRM.
- You may have a tab in My CRM called Exchange Integration Logs.

Does everything in my mailbox synchronize to CRM?

No, that is unlikely. It depends on the sync options selected by the System Administrator. In a typical default set-up, the following data synchronizes:

- Tasks modified within the last **14 days**.
- Appointments, where the end date is in the last **14 days**, or sometime in the future.
- Recurring appointments, where the end date of the recurrence pattern is in the last **14 days**, or sometime in the future.
- Contacts, which are in the **My CRM | Contacts** list, and contacts in Exchange, which are already **linked** to CRM.
- Only **default** calendar, task list, and contact folders are synchronized. Sub- or secondary folders are not included.

Synchronizing Contacts

This section assumes that:

- Synchronization has been enabled by the System Administrator.
- Your mailbox has been enabled for synchronization by the System Administrator.
- Contacts are synchronized in **both** directions.
- Where conflicts arise, the **CRM** update takes precedence ("wins").

Note: The default synchronization options described above may have been customized by the System Administrator, therefore some outcomes may vary slightly from those described.

Contacts: CRM to Exchange

Note: If you're working with Classic Outlook integration, please refer to Adding contacts: CRM to Outlook (Classic Outlook integration) (page 8-5) for more information on working with the My CRM | Contacts tab.

To flag CRM contacts for synchronization with Exchange:

1. Click **My CRM | Contacts | Add Contacts**.
2. Search for the contacts you want to synchronize. For example, search for all people who work at the company Design Right Inc.
3. Use the **Select/Deselect All** check box to toggle all the contact selections on or off.
4. Click the **Add Contacts** button. The Contacts page is displayed, showing the contacts that you selected.

5. You can perform further searches to add more people to the Contacts tab.
    - A quick way of adding, for example, all contacts where you're the Account Manager, is to click **Add Group Of Contacts**. You can also add a person to the Contacts tab from the Summary tab of any person in CRM, by clicking the **Add To My Contacts** button.
6. After the next synchronization has taken place, click the **Contacts** folder in Outlook to check the people you chose from CRM are there.

    Contacts synchronized between CRM and Outlook are tagged with the Category **CRM Contact**. This can be viewed by selecting the contact in Outlook.

Note: When a contact is added from CRM to an Exchange mailbox, deduplication takes place against the **Company Name**, and the **Person First**, **Middle**, and **Last Name**. The values in all of these fields 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 CRM

- When you remove contacts from the **My CRM | Contacts** list, which have already been added to your Exchange mailbox, they do not get deleted from your mailbox, instead the link to CRM is broken (the CRM Contact category is removed). If the contact is deleted from the CRM database, then the contact is completely removed from your mailbox.

Contacts: Exchange to CRM

Contacts, which are already **linked** to CRM, are synchronized from Exchange to CRM. Contacts become linked in two ways:

- Contacts, which originated from CRM (**My CRM | Contacts**) in the first place, are automatically linked to CRM. Any **updates** or **deletes** to these contacts in Exchange are synced back to CRM.
- Contacts, which have been added to CRM from Exchange using the Outlook plug-in **Add Contact** feature, and have been synchronized. Please refer to Working with the Outlook Plug-in for Exchange Integration (page 7-9) for more information.

Note: Contacts in Exchange will not synchronize to CRM unless they are explicitly linked in one of the above two ways.

Updating and Deleting Contacts in Exchange

- If two or more users update contacts in their Exchange mailboxes, who are linked to the same single contact record in CRM, then the most recent update "wins", and the change is synched back immediately to the linked contact records in the other Exchange mailboxes.
- When a contact is deleted in a user's mailbox in Exchange, it is removed from the **My CRM | Contacts** list for that user, but not deleted out of CRM.

Synchronizing Tasks

This section assumes that:

- Synchronization has been enabled by the System Administrator.
- Your mailbox has been enabled for synchronization by the System Administrator.
- Tasks are synchronized in **both** directions.

- Tasks modified in the last **14 days** are synchronized.
- Where conflicts arise, the **Exchange** update takes precedence ("wins").

Note: The default synchronization options described above may have been customized by the System Administrator, therefore some outcomes may vary slightly from those described.

Important **business rules** to understand on task synchronization include:

- A task created by you in Exchange, but assigned to someone else, does not get synched from your mailbox, as 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 **skipped** in the synchronization.
- A task created in CRM for **multiple users** (whose mailboxes are all due to synchronize), will be synchronized - as CRM creates an "owned" copy of each task for each user automatically.
- **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 CRM is ignored for deduplication. If the Start Date is blank in either CRM or Exchange - which is quite common, as it is not pre-filled in either system - it is ignored for deduplication purposes.
- "**Mass**" tasks, tasks generated against groups or lists, are not synchronized.

Tasks: CRM to Exchange

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

1. Create the task in CRM. For example, a phone call to Arthur Browne of Design Right. Please refer to Scheduling a callback (page 5-2) for more information on how to do this.
2. Once the next synchronization has taken place, check your mailbox **Tasks** folder to see the task. The information from the **Regarding** panel in CRM is displayed in the body of the task in Outlook. The content of this text can be customized by the System Administrator.

Tasks: Exchange to CRM

To create a task in Exchange and view it in CRM:

1. From Outlook, add a new task (**Tasks | New**).
2. Click **Save and Close**.
3. Switch to CRM, and after the next synchronization has taken place, check **My CRM | Calendar** for the new task.

Note: Only tasks from the **default Tasks folder** are synchronized with CRM. If you have tasks that you do not want to synchronize to CRM, then it is recommended these are created in secondary folders.

Synchronizing appointments

This section assumes that:

- Synchronization has been enabled by the System Administrator.
- Your mailbox has been enabled for synchronization by the System Administrator.
- Appointments are synchronized in **both** directions.
- Appointments, where the end date is in the last **14 days**, or sometime in the future, are synchronized.
- Where conflicts arise, the **Exchange** update takes precedence ("wins").

The default synchronization options described above may have been customized by the System Administrator, therefore some outcomes may vary slightly from those described.

Important: Please be aware that when a synchronized field on an Appointment is updated, a new meeting request is sent to all attendees. This is particularly important to note when adding confidential information to an Appointment.

Important business rules to understand on appointment synchronization include:

Exchange to CRM

- In order to provide a robust and reliable synchronization, 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 CRM. Invitees see a copy of the organizer appointment in their CRM calendars - not their own customized versions of the invitee appointment from Exchange.
- The exception to this synchronization rule is when the Exchange organizer of the appointment is **not** a **CRM user enabled for synchronization**, and the appointment includes **invitees who are CRM users enabled for synchronization**. In this case, the synchronization bases itself on the **invitee copies** of the appointment, to ensure the calendars of all the CRM users stay up-to-date. In this case, a read-only stub appointment is created in CRM, based on the invitee copies.

CRM to Exchange

- Appointments created in **CRM**, where the organizer **is not a sync user** do not sync to Exchange. For example: Susan Maye is not set up to sync with Exchange. William Dolan and John Finch are. In 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 to tell you the appointment does not get synced.

Exchange to CRM and 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.

Appointments: CRM to Exchange

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

1. Create the appointment in CRM. For example, a meeting with Arthur Browne of Design Right to discuss pricing. Please refer to Creating an appointment (page 5-1) for more information on how to do this.
2. Once the next synchronization has taken place, the appointment synchronizes to the Organizer's mailbox, and Exchange sends out the meeting requests. Check your mailbox **Calendar** folder to see the appointment. The information from the **Regarding** panel in CRM is displayed in the body of the appointment in Outlook. The content of this text can be disabled or customized by the System Administrator.

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

Appointments: Exchange to CRM

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

1. From Outlook, add a new appointment or meeting request (**Calendar | New**).
   For example, a meeting with Arthur Browne of Design Right to enter final negotiations. You can add the customer contact (Arthur) to the Required attendee list if you want to send him an invitation to the meeting.
2. If you want to make the appointment or meeting invisible to Sage CRM users outside of the list of attendees, mark the appointment or meeting as private in Outlook.
3. Click **Save and Close** or **Send**.
4. Switch to CRM, and after the next synchronization has taken place, check **My CRM | Calendar** for the new appointment.

Note: Only appointments from the **default Calendar** are synchronized with CRM. If you have appointments that you do not want to synchronize to CRM, then it is recommended these are created in secondary folders.

There are a few things that you'll notice straight away about the way the appointment looks in CRM:

- There is a small **Exchange Sync Info** icon in the top left-hand side of the appointment - click this, and a blue banner informs you that this appointment is linked to Exchange.
- The External Attendees tab shows a person icon on the tab - this indicates that additional people, to those shown on the appointment Details page, have been invited to the meeting. Please refer to Inviting external attendees to a meeting (page 5-14) for more information.
- If you have invited a customer in the Exchange appointment, for example Arthur Browne, who also exists in your CRM database, they are listed as an External Attendee, and an appointment record is displayed in the Communications tab of the customer record in CRM.
- Attendees from Exchange, whose mailboxes map to Resource user email addresses in CRM, are added to the User list in CRM. If they do not map to Resource user email addresses in CRM, they are added to the External Attendees tab in CRM.

Stub Appointments

Sage CRM Exchange Integration usually carries out appointment synchronization based on the Organizer's copy of an appointment. Invitees, as long as they are CRM users enabled for synchronization, can view a copy of the appointment in their calendars in CRM.

The exception to this synchronization rule is when the Exchange organizer of the appointment is **not** a **CRM user enabled for synchronization**, and the appointment includes **invitees who are CRM users enabled for synchronization**. In this case, the synchronization bases itself on the **invitee copies** of the appointment, to ensure the calendars of all the 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, and a blue banner gives you more information on the status of the appointment.

Reviewing Exchange Integration Logs

To review your own log files:

1. Click **My CRM | Exchange Integration Logs**. Your System Administrator must give you rights to view this tab.
2. Choose the type of log to view from the **Select log files** drop-down field. The list varies depending on the Sync Options set by the System Administrator.
3. Click the log to open it.

Reviewing Skipped Items

You can review additional information about appointments or tasks, which could not be synchronized in the Skipped Items logs.

The following scenarios will cause items to be skipped rather than synchronized:

Mailbox Appointments

- Recurring appointments where the recurrence range results in the number of occurrences of the mailbox series exceeding the **Maximum Number of Occurrences** allowed in CRM. This is set by the System Administrator in the System Behavior settings.
- Recurring appointments with no End Date.
- Yearly recurring appointments with a relative day of the week specified (a day, weekday or weekend-day) in the recurrence pattern.
- Monthly recurring appointments with a recurrence pattern such as “the fourth day/weekday/weekend day of every [x] months”.

CRM Appointments

- Appointments (single or recurring) where the organizer is a CRM Sync User but is not present in the CRM User list for the appointment (is not attending the meeting).
- Recurring appointments where the Daily Pattern is set to Occurs Every.

Mailbox Tasks

- Recurring tasks.
- Tasks where the “owner” of the task is not the owner of the mailbox in question.

Installing the Outlook Plug-in for Exchange Integration

The System Administrator can roll out the Outlook plug-in for Exchange Integration by Active Directory Group Policy. This installs the plug-in on your machine automatically in "silent" mode - so you may already have the plug-in.

If not, there is a "manual" install option, as long as the following prerequisites are met:

- Users must be administrators of their own machines to carry out this installation.
- You're running Outlook 2007 or 2010.
- The System Administrator has given you rights to see the plug-in button.

To manually install the Outlook plug-in for Exchange Integration:

1. Click **Install CRM Outlook Exchange Integration** from **<My Profile> | Preferences**. A security prompt is displayed.
2. Click **Install** to continue. The install checks for **.NET Framework 4.0**. If this is not on your machine, follow the install steps for this first.
3. Click **Continue** once the .NET install is complete. File download and security warning dialogs are displayed.
4. Click **Run**. The CRM Client Install Shield Wizard is displayed.
5. Before continuing, make sure **Internet Explorer** and **Outlook** are both closed.
6. Click **Install**, and follow the steps on-screen. During the install, you're prompted to confirm connection settings (see table below).
7. Once the install is finished, click **Finish**.
8. Open **Outlook**. A number of new options are available - please see Working with the Outlook Integration Plug-in.

The following table explains the **Connection Settings**:

Field	**Description**
Server Name	The CRM server name. Should be auto-filled from the CRM server.
Install Name	CRM Install name. Should be auto-filled from the CRM server.
Port Number	Defaults to 80. Can be changed if required. For example, if HTTPS is used, an alternative port may be needed.
Use Secure Connection HTTPS	Select to use an HTTPS connection
User Name	Should be auto-filled from the CRM server.
Domain	The Exchange Server domain name.

Uninstalling the Outlook Plug-in

To manually uninstall the Outlook plug-in for Exchange Integration:

1. Make sure **Outlook** and **Internet Explorer** are closed.
2. From **Control Panel | Add or Remove Programs**, click **Sage CRM Client Applications**, and follow the steps on-screen.

3. You can reinstall manually from **<My Profile> | Preferences | Re-install CRM Outlook Exchange Integration**.

Working with the Outlook Plug-in for Exchange Integration

When you log on to Outlook after installing the Outlook Plug-in for Exchange Integration, a number of new options are available. The following are described as they appear in **Outlook 2007**. If you're working with **Outlook 2010**, the same options are available, but from the Sage CRM group on the **Mail | Home** ribbon.

Option	**Location / Description**
File E-mail	Toolbar button and Sage CRM menu. Lets you file one or more emails to CRM. An email must be highlighted for this option to be active.
Add Contact	Toolbar button and Sage CRM menu. Lets you add a contact to CRM. A contact must be highlighted for this option to be active. The Add Contact option is available if Exchange Integration has been set to synchronize contacts.
Send and File	Sage CRM menu within a new email. Launches the File E-mail page once the email has reached the Sent Items folder. **Note**: **Send Immediately when connected** (Tools | Options | Mail Setup) must be enabled for this option to work.
Attach Shared Doc	Sage CRM menu within a new email. Lets you attach documents from **My CRM** | Shared Documents.
Help	Sage CRM menu. Launches Sage CRM help for the Outlook Plug-in for Exchange Integration.
About Sage CRM Plug-in	Version information on the plug-in.

When you try to access any of these options for the first time since opening Outlook, you're prompted to log on to CRM.

File E-mail

To file one or more emails from Outlook/Exchange to CRM:

1. Highlight the email(s) to file and click **File E-mail** from the toolbar. CRM searches for matches on the **From** address for **incoming** mail, and on the **recipients** email addresses for **outgoing** mails. The results are displayed in the E-mail Target List.
2. Use the **Add** and **Remove** buttons to find or remove target companies/people to file under. If multiple people are selected, the email(s) are filed against each target specified.

3. Set the **Filing Options** to determine what kind of communication the email(s) are filed against.
4. Select **File E-mail** to carry out the filing in CRM and return to Outlook, or **File and View** to view the communication in CRM first. Attachments are saved with the communication record.

Filed emails are marked with the message **Filed to Sage CRM**.

Add Contact

The Add Contact option is available if the Exchange Integration has been set to synchronize contacts.

To add a contact from Outlook/Exchange to CRM:

1. Highlight the contact in Outlook, and click the **Add Contact** button. Deduplication is carried out based on the match rules set by the System Administrator in CRM. For example, Company Name "contains", and Person Last Name "contains". Please refer to Preventing duplicate entries (page 4-14) for more information.
2. Review and complete the contact details in CRM, then click **Save**.
3. The contact is added to the CRM database, and also displayed in the **My CRM | Contacts** list. The Add Contact button is disabled for the contact you have added.

If the CRM match rules detected that the contact was already in the CRM database, then it is just added to the My CRM | Contacts list. **Note**: The contact does not show as linked (**CRM Contact** category in Outlook) until the next synchronization. At that point, deduplication takes places using Exchange Synchronization deduplication. Please see Contacts: CRM to Exchange (page 7-2) for more information.

Chapter 8: Classic Outlook integration

- Downloading the Outlook plug-in for Classic Outlook integration
- Using CRM from within Outlook
- Synchronizing contacts
- Adding contacts: CRM to Outlook
- Adding Contacts: Outlook to CRM
- Changing and deleting contacts
- View contact information from Outlook
- Synchronizing appointments and tasks
- Reviewing synchronization conflicts
- Reviewing skipped items
- Attaching shared documents to Outlook emails
- Filing emails from Outlook to CRM
- Reinstalling the Outlook plug-in for Classic Outlook integration
- Uninstalling the Outlook plug-in for Classic Outlook integration

Downloading the Outlook plug-in for Classic Outlook integration

To use the Classic Outlook integration features of CRM, you need to download the Outlook Plug-in for Classic Outlook integration from within CRM. Before you do this:

- Check that your email account runs on Microsoft Exchange Server, or is a POP3 email account, as CRM Outlook client integration is supported for email accounts running on Microsoft Exchange Server MAPI or POP3. Roaming Profiles are not supported for Outlook in a Terminal Services or Citrix environment.
- Check that you're running either Outlook 2010 or Outlook 2013 (Professional Edition).
- Check with your System Administrator that you're an administrator of your own machine and that Outlook integration / synchronization has been enabled.
- Check that your timezone is set correctly in **<My Profile> | Preferences**.
- Check with your System Administrator how the Classic Outlook synchronization has been configured. Options include:
  - **One Way Synchronization.** The system can be configured to synchronize from CRM to Outlook only or from Outlook to CRM only. The default configuration is that the synchronization takes place both ways - CRM to Outlook, and Outlook to CRM.
  - **Note**: When this setting is changed by the System Administrator in CRM, users need to restart their CRM sessions from within Outlook, then synchronize, for this change to take affect.
  - **Synchronize Outlook Deletions.** If the user deletes appointments, tasks, or contacts in Outlook, then the corresponding records are deleted in CRM, if the user has

appropriate rights to delete them. If the user deletes appointments or tasks in CRM, then the corresponding records are deleted in Outlook. If a contact is removed from the My CRM | Contacts list in CRM, it is deleted in Outlook. This is the default configuration.

- **Managing CRM And Outlook Updates.** This option can be used when One Way Synchronization is set to No, to help manage conflicts that may arise if two people change the same information in either system since the last synchronization. Conflicts can be viewed via View Conflict Log in Outlook. The settings are:
  - Outlook Updates Win. The changes made to Outlook will appear in both Outlook and CRM. This is the recommended option for organizations that use Outlook as their primary appointment scheduling tool. The default for new installations is Outlook Updates Win.
  - Organizer Updates Win. This only applies to Appointments. The Organizer refers to the person who created the meeting in Outlook. If any users update the same record in both systems and the Organizer synchronizes, then the system behaves as per the Outlook Updates Win setting. If any users update the same record in both systems and an “Attendee” synchronizes, then the system behaves as per the CRM Updates Win setting. This option is suitable for organizations that mainly rely on CRM for their customer interaction management, however they also have a number of users who work with Outlook to organize and update meetings. This option will ensure that the Outlook organizers’ changes will be accepted in CRM.
  - CRM Updates Win. Changes made to CRM appear in both Outlook and CRM. This is the recommended option for organizations that use CRM as their primary appointment scheduling tool.
- **Synchronize Outlook Contacts.** The default setting is for Contact synchronization to take place between Outlook and CRM.
- **Synchronize Outlook Appointments.** The default setting is for Appointment synchronization to take place between Outlook and CRM.
- **Synchronize Outlook Tasks.** The default setting is for Task synchronization to take place between Outlook and CRM.

To download the Outlook plug-in for Classic Outlook integration:

1. Close Outlook if it is currently open.
2. Access Sage CRM by using Internet Explorer.
   Currently, the Outlook Plug-in cannot be downloaded from any other web browser.
3. Click **<My Profile> | Preferences**.
4. Click the **Install CRM Outlook Integration** button. If the Microsoft .NET framework is not already installed on your computer, you're prompted to install it at this point. The .NET framework must be installed for the Outlook plug-in to work.
5. Once the .NET installation has finished, click **Continue**. The Security Warning dialog box is displayed.
6. Verify the information in the security prompt, and click **Run**. The CRM Client InstallShield Wizard is displayed.

> If the plug-in has already been installed by another user on the current client, the File Download and Security Warning dialog boxes are skipped, and the CRM Client InstallShield Wizard will run automatically to take you through the procedure for installing the Outlook plug-in.

7. Ensure you're logged off CRM and Internet Explorer and Outlook are closed before continuing with the install.
8. Complete the InstallShield Wizard steps.
9. Open Outlook.
   CRM Classic Outlook integration features are displayed within Outlook. In CRM, the Install icon changes to a Reinstall icon.

Using CRM from within Outlook (Classic Outlook integration)

The Sage CRM options are available from the **CRM** ribbon.

After the plug-in is downloaded, the following features are displayed in Outlook:

- A **CRM ribbon** with groups. See table below for details.
- A **CRM Options** page. To access it, click **Options** in the CRM ribbon of Outlook, or click **Options** on the CRM Logon page.

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

CRM Actions group	Description
File Email	File single or multiple email records with the company or person record in CRM
Add Contact	Highlight an individual Outlook contact, then add to CRM using this button.

The following table explains the **Synchronization** group in the CRM ribbon.

Synchronization Group	Description
Sync	Initiates a synchronization between CRM and Outlook.
View Conflict Log	View conflicts which arise during synchronization to field-level detail.
View Skipped Items	View details about items that were skipped during synchronization. Please refer to Reviewing skipped items (Classic Outlook integration) (page 8-10) for more information.

Synchronization Group	Description
Sync Info Reset	Resets mappings between synchronized contacts, appointments and tasks back to the state they were in after the first post-plug-in-install synchronization.
Options	Opens the CRM Options page.
Uninstall	Uninstalls the CRM Outlook plug-in.

The following table explains the fields on the **CRM Options** page.

CRM Options	Description
Server Name	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	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 [] Items	A dialog box is displayed if more than the specified number of records in CRM are going to be deleted as a result of a synchronization. You can then decide to proceed with the deletions or to stop them.

Synchronizing contacts (Classic Outlook integration)

When you flag the Sage CRM contacts you want to add to Outlook, or when you amend or delete flagged contacts, the end result is reflected in Outlook once a synchronization takes place.

You must add Outlook contacts manually, by clicking **Add Contact**. If you amend or delete these contacts in Outlook, the end result is reflected in Sage CRM once a synchronization takes place.

Once contacts have been synchronized, it doesn't matter if you make changes to them in Outlook or in Sage CRM. The details get synchronized both ways. Synchronization can be done manually, or it can be done automatically at specified intervals.

Adding contacts: CRM to Outlook (Classic Outlook integration)

Before they can get synchronized, you first need to flag the CRM contacts you want to synchronize with Outlook. **Note**: If a synchronized CRM contact has an address that is shared by another person or company and the user changes that address in Outlook, CRM will update the shared address with the new information during Contact synchronization.

To flag CRM contacts and synchronize them with Outlook:

1. Click the **My CRM | Contacts** tab. The Contacts page is displayed.
2. Click **Add Contacts**. The Find And Add Contacts page is displayed.
3. Search for the contact or contacts you want to see in Outlook. For example, search for all people who work at the company Design Right Inc. A list of people matching your search criteria is displayed. They are all unselected by default.
4. Select any contacts you want to see in Outlook. You can use the **Select/Deselect All** check box to toggle all the contacts selections on or off. **Note**: You can sort contacts by clicking any subject heading except **Remove Contact**.
5. Click the **Add Contacts** button. The Contacts page is displayed, showing the contacts that you selected.
6. You can perform further searches to add more people to the Contacts tab.
    - A quick way of adding, for example, all contacts where you are the Account Manager, is to click **Add Group Of Contacts**. You can also add a person to the Contacts tab from the Summary tab of any person in CRM, by clicking the **Add To My Contacts**.
    - You can perform actions (Merge to Word, Merge to PDF, New Task, Send Email, Export To File) on your Contacts list in the same way as you can for any search lists or saved searches.

      > If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

    - You can wait until the next automatic synchronization takes place, or you can synchronize manually at this point if you want.
7. Click the **Sync** button from the Outlook ribbon to synchronize manually. A dialog box shows the synchronization status.
8. If the synchronization process has detected any conflicts, a dialog box is displayed allowing you to review the conflicts.
9. Select the **Contacts** folder in MS Outlook to check the people you chose from CRM are there. Contacts synchronized between CRM and Outlook are tagged in Outlook with the Category CRM Contact. This can be viewed by double clicking the contact in Outlook.

Adding Contacts: Outlook to CRM (Classic Outlook integration)

You add Outlook contacts to CRM manually with the Add Contact button. You cannot add a contact from outlook to CRM if the contact in Outlook has company information and the user does not have insert rights to the company entity in CRM. To add the contact, you must either be given rights to insert company data or you must remove the Company information from the outlook record.

> If you change company information for a contact in Outlook and then synchronize with CRM, the updated company information will not be carried through to CRM. You must manually update the company information for this contact in CRM.

CRM field level security is not applied to required fields in Outlook. So, for example, if you delete the contents of a required field in an Outlook Contact and then synchronize with CRM, you will not be warned that a required field has not been populated.

1. Click **Contacts** from the Outlook Shortcuts group.
2. Highlight the contact you want to add to CRM.
3. Click the **Add Contact** button from the ribbon. If the Outlook contact contains a company, a dedupe is performed on the Company name. Please refer to Preventing duplicate entries (page 4-14) for more information on handling duplicate contacts.
    - If a company match is detected in CRM, the list of matches is displayed and you can select a matching company by clicking it. Alternatively, if no company on the list matches the contact you're adding, you can click the Ignore Warning and Enter Company button.
    - If you select a company from the list of matching companies, a dedupe is then performed on the Person. Please refer to Preventing duplicate entries (page 4-14) for more information on handling duplicate contacts. If any duplicates are detected, they are displayed. You can select a contact by clicking it. If no duplicates are detected, the new Person page is displayed in CRM within Outlook, with the existing contact details from Outlook filled in.
    - If a company match is not detected, or if one is detected and you click the Ignore Warning and Enter Company button, a new company (that includes the person details on the Person panel) is automatically created using the Company name from Outlook.

   If the Outlook contact does not have a company associated with it, a dedupe is performed on the Person name.
    - If a person match is detected in CRM, the list of matches is displayed and you can select a matching person by clicking it. Alternatively, if nobody on the list matches the contact you're adding, you can click the Ignore Warning and Enter Individual button.
    - You can create a company for the contact in CRM by clicking New Company on the Person details page. Please refer to Adding a new company (page 4-2) for more information on creating companies.
4. Click **Save** to save the contact in CRM. The contact is added to the **Contacts** tab in CRM so that it gets synchronized in the future. When a contact is added from Outlook to CRM, the Outlook plug-in will automatically run synchronization with CRM on contacts only. This is to ensure that any additional information entered in CRM is also reflected in Outlook.

Changing and deleting contacts (Classic Outlook integration)

If you make any changes to any of your Sage CRM contacts, the changes are reflected in Outlook the next time you synchronize.

When you remove a contact from Contacts in CRM or if the contact is deleted from CRM and therefore automatically removed from Contacts, it is deleted from Outlook the next time you synchronize.

Viewing Detailed Contact Information from Outlook (Classic Outlook integration)

Any contact in Outlook, who has been synchronized with CRM maintains a link to all the detailed customer interaction history in CRM.

To access detailed contact information from Outlook:

1. Click the **Contacts** icon in Outlook.
2. Highlight the contact you want to view detailed information on.
3. Click the **View Contact** button from the Outlook toolbar.

The Person Summary tab of the selected contact is displayed.

Synchronizing appointments and tasks (Classic Outlook integration)

Before you start working with the Outlook Synchronization feature, you must check that your correct Time Zone is specified in **<My Profile> | Preferences**.

- The first synchronization synchronizes:
  - Recurring appointments.
  - Appointments which have been modified in last 14 days.
  - Appointments with an end date between the last 14 days and today.
  - Tasks which have been modified in last 14 days.
  - Tasks with a status of Pending or In Progress.
- Subsequent synchronizations synchronize:
  - Appointments modified since the last synchronization get synchronized.
  - Tasks modified since the last synchronization.

Outlook appointments and tasks (Classic Outlook integration)

To schedule a task from Outlook:

1. Click the **Tasks** folder in Outlook.
2. Click **New Task** from **Home | New**. The Task window is displayed.
3. Complete the details of the task, and set a reminder if you want. Although you can add a contact to the task in Outlook, this will not be reflected in CRM, even if the contact is in CRM.
4. Click **Save And Close**. The task is displayed in your Task list in Outlook.
5. Click **Sync**, then switch to CRM. The task is displayed on the **My CRM | Calendar** tab. If you set a reminder in Outlook, it pops up in Outlook as a Reminder, and in CRM as an onscreen notification.This applies to tasks and appointments.

Tasks created in Outlook are given the default completion time of 12 noon on their **Due Date** in CRM.

CRM appointments and tasks (Classic Outlook integration)

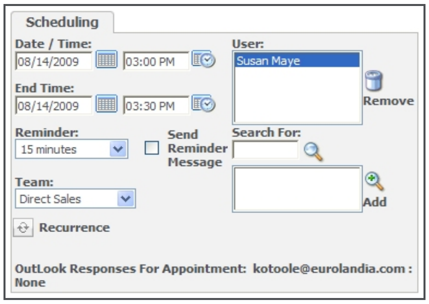
To schedule an appointment in CRM:

1. Set up the appointment with a contact, for example Arthur Browne, in CRM for next week, and click **Save**.
2. Switch to **Outlook**.
3. Click **Sync**. The appointment is displayed in your Outlook Calendar.

Working with appointments, meetings and multiple users (Classic Outlook integration)

When you're synchronizing appointments between Outlook and CRM, in particular where some of the users may only use Outlook and not CRM, the synchronization takes place as follows:

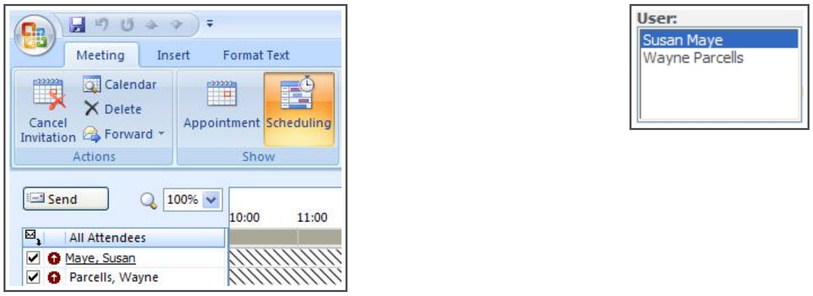
- If you create an appointment in Outlook for a non-CRM user, their email addresses appear in the CRM appointment at the end of the screen.


Scheduling
Remove
Search For:
Add
Recurrence

Date / Time: 08/14/2009 03:00 PM
End Time: 08/14/2009 03:30 PM
Reminder: 15 minutes
☐ Send Reminder Message
Team: Direct Sales
User: Susan Maye
OutLook Responses For Appointment: kotoole@eurolandia.com : None

Outlook Response from non-CRM users displayed in CRM

- If you create an appointment in Outlook for multiple CRM users, multiple users are listed against the appointment in CRM—as long as email addresses have been set up against the user. The Outlook meeting organizer is displayed in the Organizer field in CRM.

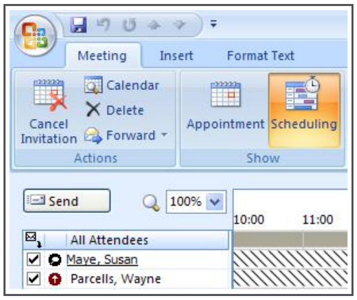

Meeting
Insert
Format Text
Cancel Invitation
Calendar
Delete
Forward
Actions
Appointment
Scheduling
Show
Send
100%
10:00
11:00
All Attendees

☑ Maye, Susan
☑ Parcells, Wayne

User:
Susan Maye
Wayne Parcells

CRM users as Attendees in Outlook and CRM

- If you create an appointment with a person, for example, Arthur Browne in CRM, his email address appears on the list of attendees in Outlook. You do not see from CRM if he has accepted the meeting and can attend.



Person in CRM as attendee in Outlook

When a user in CRM creates an appointment and links a person or company to it, the selected company or person is displayed in the body of the appointment in Outlook.

If you create an appointment in CRM with a user 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.

Only one Outlook calendar folder (the default Calendar) is supported by CRM Outlook Integration.

Private appointments (and tasks) do *not* get synchronized between CRM and Outlook.

Recurring appointments and tasks (Classic Outlook integration)

When creating a recurring Appointment in Outlook, an End By date must be selected on the recurrence dialog box if the appointment is to be synched to CRM. Recurring Tasks are not synchronized from Outlook to CRM. Recurring Appointments created in CRM get synchronized to Outlook.

The default maximum number of occurrences allowed in CRM is 200. This is set by the System Administrator. If you create a recurring appointment in Outlook with a greater number of occurrences than that allowed in CRM, then the appointments will not get synched. You should also note that CRM allows you to have more than one recurring appointment from a series occurring on the same day, but Outlook does not.

All day events (Classic Outlook integration)

An All Day Event in Outlook becomes an All Day Event in CRM. An All Day Event in CRM becomes an All Day Event in Outlook. For example, an All Day Event for Friday in Outlook, starts in CRM on Friday at 00:00 and ends on 23:59 Friday.

An All Day Event appointment created in CRM is displayed in Outlook as an All Day Event.

Reviewing synchronization conflicts (Classic Outlook integration)

Conflict information is generated if two people change the same information in either 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 4 pm, finishing at 5.30 pm. The appointment is synchronized, and is displayed in CRM. Before the next synchronization takes place, one user changes the end time to 4.30 pm in CRM, and another user changes the end time to 6 pm in Outlook. When synchronization takes place, the appointment end time is updated to 6 pm in CRM and Outlook, and a conflict is displayed in Outlook.

To review the synchronization conflict:

1. In Outlook, click **CRM | View Conflict Log**. The Synchronization Conflicts window is displayed.
2. Click the conflict you want to view in the **List Of Logged Conflicts** panel. The left-hand side of the Conflict Details panel shows the field or fields where a conflict has arisen. The right-hand side of the Conflict Details panel shows the values before the synchronization took place.
    - **Hide Empty Fields and Hide Equal**. Toggling these fields on or off hides or shows the fields where the values are equal in both Outlook and CRM.
    - **Clear Log**. Clears all the conflict from the List Of Logged Conflicts panel.
    - **Delete Selected**. Clears the selected conflict from the List Of Logged Conflicts panel.
    - **Copy Details**. Copies the Outlook value to the clipboard so that it can be reinstated if required.
    - **Help**. Displays the CRM help page on Synchronization Conflicts.
3. Scroll to highlighted field to review the conflict in data. Click **Close** to close the Synchronization Conflicts window.

Reviewing skipped items (Classic Outlook integration)

You can review additional information about appointments, tasks or contacts which could not be synchronized in the Skipped Items log.

The following scenarios cause items to be skipped rather than synchronized:

- 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 only to one of occurrence of recurring appointment.
- A contact in Outlook has an empty first and last name.
- When there has been no response from Outlook when reading or writing an appointment, task or contact from or to Outlook.
- When a recurring appointment is created and the meeting organizer and invitees sync, 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 only invited to one or some of the occurrences of the series.

To view skipped items:

1. In Outlook, click **CRM | View Skipped Items**. The file, SKIPPEDITEMS.LOG is opened. An example of the text is:

```
***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 CRM server
Server ID:0
Outlook unique ID:2254403268
Cause:Exception raised: Incompatible recurrence pattern (no
end date)
Logged at:MJ1024
```

This shows the time problem occurred (Logged On), the area the problem occurred in (Type), the Subject and Date & Time of the item (for appointments and tasks), and the cause. There is also additional information for your System Administrator or Support team (Action, Server ID, Outlook Unique ID, Logged At).

2. Rectify the problem if you can easily do so. For example, adding an end date to recurring appointment in Outlook. If items are regularly being skipped that you expect to be synchronized, please refer to your System Administrator.
3. Close the SKIPPEDITEMS.LOG when you have finished reviewing it.

The log can also be viewed from C:\Documents and Settings\[username]\Application Data\Sage\CRM\OutlookPlugin.

Attaching shared documents to Outlook emails (Classic Outlook integration)

When you're logged on to CRM from within Outlook, you can attach documents from the Shared Documents tab in CRM to emails sent from Outlook.

1. Log on to CRM from within Outlook.
2. In Outlook, click **New | Mail Message**. The new email pane is displayed.
3. Click **Attach Shared Doc**. The list of documents available on the Shared Documents tab is displayed in a new window.
4. Select **Attach** for the document you want to attach to the email.
5. Click **Attach**. The selected document has been added to your email as an attachment.

Filing emails from Outlook to CRM (Classic Outlook integration)

You can file emails from any folder in Outlook against records in CRM.

When filing emails from Outlook to CRM, the plugin tries to match the email address on the Outlook email with an email address in CRM. You can also select a batch of emails from any folder in Outlook and file them to CRM in a single action. When you perform a mass filing, CRM will look only for a match with the first email address in the batch you have selected. If no match is found for the first email address, you must manually match the email batch to a record in CRM. When filing batches of emails, it is recommended that all emails in the Outlook-based batch have the same email address.

> When filing an email from outlook to CRM, if the user selects a company or person, the email will inherit the territory of either the company or person (in that order), depending on the users insert rights for those territories.

1. From your Inbox, highlight or click the email you want to file in CRM.
2. Click **File Email** when it becomes active. The File Email screen is displayed.
3. Use the Advanced Search Select buttons to specify what records you want the email filed against.
4. Check the settings in the Filing Options panel, and change them if you need to.
   - **Status** The current status of the email (Canceled, Complete, Pending, or In Progress).
   - **File By Date And Time** Select whether to file the email by the original date and time the email 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 And View Email** in Sage CRM. The Email In page is displayed. This gives you access to Email action buttons in CRM to reply to the email straightaway from within CRM. This automatically logs the reply as a communication record against the customer.
6. Click **File Email** to return to the email list in Outlook.
7. If you click **File And View Email** for multiple emails, the Communications tab of the person you emailed is displayed.
8. Click **Continue**. The list of emails in Outlook is displayed. The filed email has a check mark next to it showing it was successfully filed in CRM.
   You also can right-click your Inbox in Outlook, click **Open In New Window**, and drag and drop emails directly onto the Document Drop icon in CRM (Internet Explorer only). This method stores the whole email as an attachment to the communication record. For more information on dragging and dropping, please refer to Document Drop (page 9-9).

To file an email while sending it from Outlook:

1. Log on to Sage CRM from within Outlook.
2. In Outlook, click **New | Mail Message**. The new email pane is displayed.
3. Fill in the email address fields.
4. Click **Send And File** . The File Email screen is displayed.
5. Use the Advanced Search Select buttons to specify what records you want the email filed against.
6. Select the appropriate settings in the **Filing Options** panel.
7. Click **File Email**. The email is filed in the CRM database against the record you specified.

Reinstalling the Outlook plug-in for Classic Outlook integration

Your System Administrator may instruct you to reinstall the Outlook plug-in. For example, if CRM is upgraded with a new plug-in.

1. Click **<My Profile> | Preferences**.
2. Click **Reinstall CRM MS Outlook Integration**. A dialog box is displayed, informing you that the new plugin will load next time you start MS Outlook.

You can check the Plug-in version from Internet Explorer.

1. Click **Tools** (cog icon on the top-right hand-side).
2. Click **Manage Add-ons**.
3. Right-click the **CRM Outlook Plug-in** file and click **More Information**.

Uninstalling the Outlook plug-in for Classic Outlook integration

Your System Administrator may instruct you to uninstall the Outlook plug-in for Classic Outlook integration.

- In the Outlook ribbon, click **CRM | Uninstall**.
- A dialog is displayed communicating that the uninstall was successful. Click OK and Outlook will be closed.

> The plug-in cannot be uninstalled when User Account Control (UAC) is enabled in Windows 7. To uninstall the plugin, a user with administrator privileges must temporarily disable UAC. After uninstalling, the administrator can re-enable UAC.

Chapter 9: Managing documents

- Downloading the CRM plug-in
- Mail merge templates
- Performing a mail merge
- Uploading an image file
- Creating a new template and adding merge fields
- Creating a quote or order template
- Creating a new template in Microsoft Word
- Uploading a Word document template
- Tracking documents on the Documents tab
- Retrieving a merged document from the Documents tab
- Adding a document to the Documents tab
- Document Drop
- Drop Files Here area
- Linking email correspondence to a customer
- Dropping a document into the Documents tab
- Shared documents

Downloading the CRM plug-in

The CRM plug-in gives you access to the Document Drop feature, and the **Edit Attachment** button on the Document Details panel and during a mail merge. When you first encounter a feature that requires the plug-in (for example, the Document Drop icon in your Calendar), you're prompted to download the plug-in. 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 plug-in again.

> These features are available only when working with Sage CRM in Internet Explorer. Your System Administrator can configure access to the plug-in from **<My Profile> | Administration**.

Mail merge templates

Sample mail merge templates are available from the **Shared Templates** list. Shared templates are stored on the Sage CRM server and are available to all users. Info Managers and System Administrators can create and upload templates available to all users.

You can create new mail merge templates that are available exclusively to you. You can also create mail merge documents with Word document templates you've saved locally. For more information, see Uploading a Word document template (page 9-7).

Performing a mail merge

You can merge an existing template with Company and Person details. You can create a merged document for all contacts contained in a search list, saved search, or group.

1. Click **Find | <Entity>**, enter your search criteria and click **Find**.
   To perform a mail merge for multiple contacts, click **Search | Person** and search for the required records.
2. Click the record to use in the mail merge.
3. Click the **Documents** tab and 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.

4. Click the template link.
   - You can modify an HTML template. Add custom text, insert Sage CRM merge fields, and apply custom formatting. Click **Save Template**. You can only save updated templates that belong to you. Shared templates can only be modified by a System Administrator or an Info Manager.
   - To see what the merged document will look like, click **Preview Merge**. Disable any active pop-up blockers to view the preview.
   - To continue with the mail merge, click **Merge and Continue**.
5. To create a completed Communication record with a link to the merged document, select **Create Communication**.
6. To change the merged document, click **Edit merged document**. This option is only available in IE and when the Active X plug-in is used. Make your changes to the document, save and close. Then click **Save**.

   > Your System Administrator controls access to the Active X plug-in from **<My Profile> | Administration | Email and Documents | Documents and Reports Configuration**.

7. Click **Continue**.
8. If you select **Create Communication**, the Save Merged Document As A Communication page is displayed. Add a **Subject** for the communication, update any other fields, and click **Save**.

A Communication record is created to record that a letter was sent out, forming part of the customer's interaction history. If you created a merged document for all contacts contained in a search list, saved search, or group, a Communication record is created against all contacts on your list. You can view the merged document as an attachment on the Communication record and from the **Documents** tab.

Uploading an image file

To use images for your HTML mail merge templates, you must first upload the images to the server.

1. Click **Find | <Entity>**.
2. Enter your search criteria and click **Find**.
3. Click the person or company to whom you want to send the merged document.
4. Click the **Documents** tab and click **Merge to Word** or **Merge to PDF**. A list of shared templates is displayed.

   > If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

5. Click **Add Local Template / Image**.
6. Browse to the image file.
   - In IE, click **Browse** to navigate to the file.
   - In other browsers, select the image file from its current location. When using Safari, you can add only one file at a time.
   - The file is listed in **File(s)**. A green check mark indicates that it was uploaded. 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.
7. Enter details for the image file and click **Save**. All uploaded image files are saved. When you've saved the image, you can use it when creating a new mail merge template in Sage CRM.To insert any uploaded images into an HTML template, type the image name in an HTML IMG tag. For example, `<img src="logo.png">`.

Creating a new template and adding merge fields

You can add new templates for your own use. Ensure you're in the context you want the template to be associated with. For example, open a Case record to create a template that uses case merge fields.

1. Click the **Documents** tab and 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.

2. Click **Create Template** and enter details in **File** and **Description**.
3. Create the main body of your template. You can paste content from Microsoft Word or HTML source code into the rich text editor.
4. Insert any images you want to use in the template by inserting the image name in an HTML IMG tag. For example, <img src="logo.jpg">. To insert an image, you must first upload it to the server. For more information, see Uploading an image file (page 9-2).
5. 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.

6. To preview the merged document, click **Preview Merge**. If you're merging multiple records, the preview shows only the first record in the group.
7. Click **Save Template**. The new template is saved in HTML format and listed in your **Shared Templates**. When you click **Save Template**, a **Delete** button appears. You can delete only those templates that you created using the rich text editor.
6. To continue with a merge, click **Merge and Continue**.
7. To share your template with other users, save it locally, email it to your System Administrator asking the administrator to upload it to the global Shared Templates list.

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 quote or order template

Watch a video

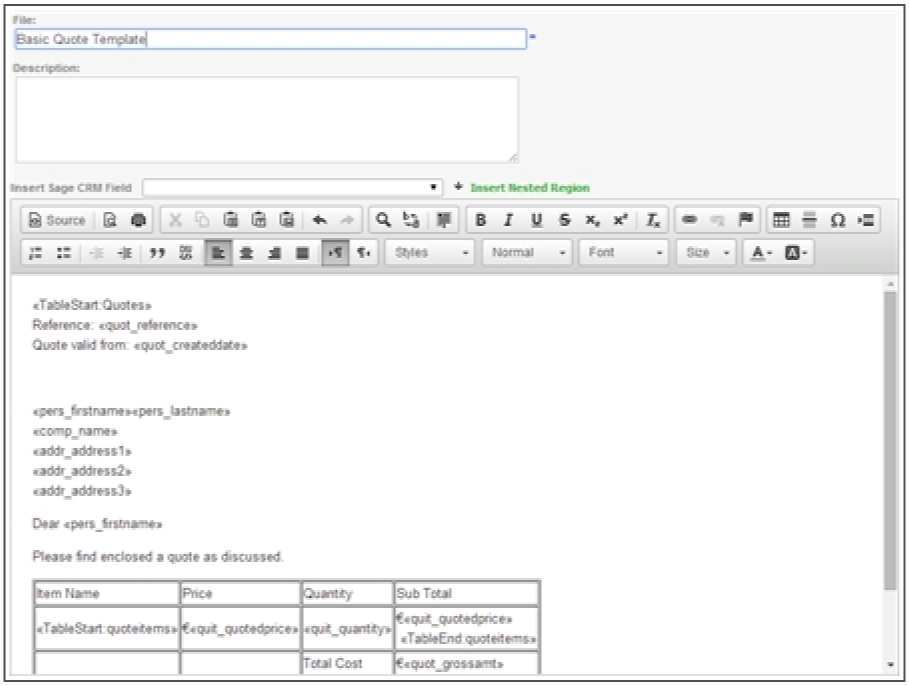
User requirements: All users can create and save templates, and use them when merging documents. However, only Info Managers and System Administrators can change shared templates or the default quick quote and order templates.

Sage CRM ships with sample quote and order templates including a default template for quick quotes and orders. You can also create your own templates.

1. Open a Quote or Order record.
2. Click the **Documents** tab and 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.

3. Click **Create Template**.
4. Enter template details in **File** and **Description**.
5. Create the main body of your template.
   - To insert Sage CRM merge fields, select the fields from **Insert Sage CRM Field**.
   - To include a table with merge fields, click **Insert Nested Region**. This inserts the start and end tags for the main table and the child table. For example, Quotes and Quote Items. 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.
   - **Important: You must include TableStart and TableEnd in the same template section, table row or table cell**. This applies even if you're not using line items.



File: Basic Quote Template

Description:

«TableStart:Quotes»
Reference: «quot_reference»
Quote valid from: «quot_createddate»

«pers_firstname»«pers_lastname»
«comp_name»
«addr_address1»
«addr_address2»
«addr_address3»

Dear «pers_firstname»

Please find enclosed a quote as discussed.

Item Name	Price	Quantity	Sub Total
«TableStart:quoteitems»	€«quit_quotedprice»	«quit_quantity»	€«quit_quotedprice» «TableEnd:quoteitems»
		Total Cost	€«quot_grossamt»

Basic Quote Mail Merge Template

6. To preview the merged document, click **Preview Merge**. If you're merging multiple records,

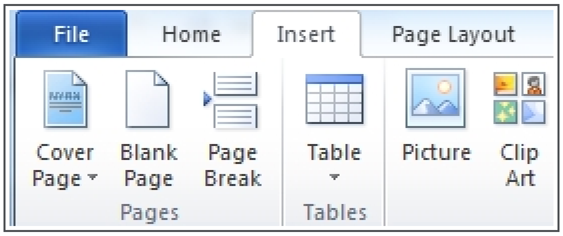
the preview shows only the first record in the group.

7. Click **Save**. The template is saved in HTML format.

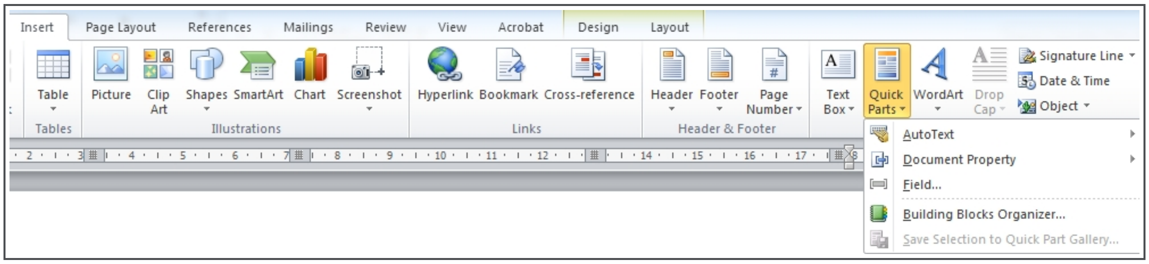
Creating a new template in Microsoft Word

You can create mail merge templates in Word that you can upload to Sage CRM.

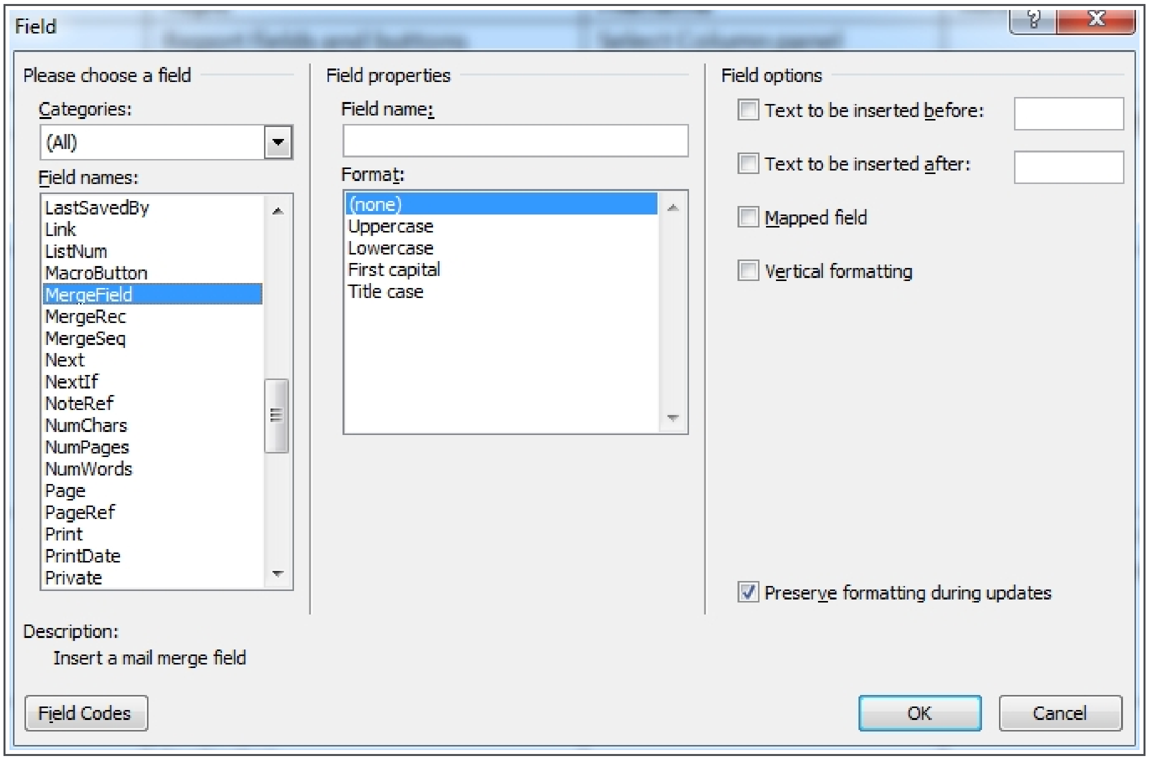
1. In the main document, type any content that you want to appear on every copy of the document.


File
Home
Insert
Page Layout
Cover Page
Blank Page
Page Break
Pages
Table
Tables
Picture
Clip Art

2. To add a picture, click **Insert | Picture**. To ensure your picture and text remain formatted correctly during the merge process, use a table to format your document.


Insert
Page Layout
References
Mailings
Review
View
Acrobat
Design
Layout
Table
Tables
Picture
Clip Art
Shapes
SmartArt
Chart
Screenshot
Illustrations
Hyperlink
Bookmark
Cross-reference
Links
Header
Footer
Page Number
Header & Footer
Text Box
Quick Parts
WordArt
Drop Cap
Signature Line
Date & Time
Object
AutoText
Document Property
Field...
Building Blocks Organizer...
Save Selection to Quick Part Gallery...

3. To insert a merge field to the template, click **Insert| Quick Parts | Field**. To ensure the template works properly, a merge field must correspond to the exact field name in Sage CRM. Check the field name with your System Administrator. Enter merge fields from only one entity. For example, when creating a template for use with Case records, you can enter Case, Person, Company, Address, and User merge fields but not Quote merge fields.


Field
Please choose a field
Categories:
(All)
Field names:
LastSavedBy
Link
ListNum
MacroButton
MergeField
MergeRec
MergeSeq
Next
NextIf
NoteRef
NumChars
NumPages
NumWords
Page
PageRef
Print
PrintDate
Private
Field properties
Field name:
Format:
(none)
Uppercase
Lowercase
First capital
Title case
Field options
☐ Text to be inserted before:
☐ Text to be inserted after:
☐ Mapped field
☐ Vertical formatting
☑ Preserve formatting during updates
Description:
Insert a mail merge field
Field Codes
OK
Cancel

4. Select **MergeField** from **Field names**.
5. Enter the Sage CRM merge field name in **Field name** and click **OK**.
6. Click **File | Save As**, and save the template in one of the following formats: .DOCX, .HTM, and .HTML. You can now upload the template and use it to perform mail merges. When you upload the template, you must associate it with the entity, for which you've entered merge fields. To share the template with other users, email it to your System Administrator and ask the administrator to upload it to the Shared Templates list.

Uploading a Word document template

You can upload a local Word document template and use it to perform a mail merge.

1. Open an entity record and click the **Documents** tab.
2. 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.

3. Click **Add Local Template / Image**.
4. Browse to the document file.
   - In IE, click **Browse** to navigate to the file.
   - In other browsers, select the file from its current location. **Note**: When using Safari, you can add only one file at a time.
   - The file is listed in **File(s)**. A green check mark indicates that it was uploaded. 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.
6. Select the entity you want the template to be associated with from **Entity**.
7. Click **Save**. All uploaded files are saved.

Tracking documents on the Documents tab

Managing documents relating to your customers, suppliers, partners, and prospects is an integral part of managing your whole relationship with them.

The Documents tab enables you to:

- Link copies of merged documents generated through the system, such as letters and emails, to a customer.
- Retrieve these documents at a later date from within the company or person context for viewing and editing.
- Link copies of any document generated outside of the system to a company, person, sales opportunity, case, or solution.
- Carry out a mail merge using the customer details from the context you're in.

The Documents tab is available within the context of a Company, Person, Opportunity, Case, Solution, Quote, Order, and Custom entity.

Documents in the Opportunity or Case Documents tabs are visible in the Company and Person Library tabs. Documents in the Person Documents tab are also visible in the Company Documents tab (unless the person is not linked to a company).

Retrieving a merged document from the Documents tab

If you sent out a letter to a customer using the Merge Document functionality, and set **Create Communication** and **Save Document** letter options to **Yes**, a copy of the merged document is automatically attached to the communication record and stored in the **Documents** tab.

1. Find the person to whom you sent the letter and open the record.
2. Click the **Documents** tab. A list of all document entries for the person is displayed.
    - Click the **View Attachment** icon beside the document. This opens the document without having to drill into the document entry details.
    - Alternatively, click the document link and click **View Attachment**. This opens the document in a new browser window.

To view the document from the Communication record, open the record and click **View Attachment**.

Adding a document to the Documents tab

You can upload a document and make it available for other users to view.

1. Open an entity record and click the **Documents** tab.
2. Click **Add File**.
3. Browse to the document file.
    - In IE, click **Browse** to navigate to the file.
    - In other browsers, select the file from its current location.

    > When using Safari, you can add only one file at a time.

    - The file is listed in **File(s)**. A green check mark indicates that it was uploaded. 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 the document details.
5. Click **Add File** to add more files.
6. To automatically create a new completed communication record when the Documents entry is saved, select **Create Communication**.
7. Click **Save**. All uploaded image files are saved. If you selected **Create Communication**, you can view the completed communication record on the Company Communications tab, and the document entries from the Attachments tab within the communication.

Document Drop

The Document Drop feature provides a short cut for linking documents, emails, or any* type of file from another application to customer data in Sage CRM. If a document is dropped onto the icon in a communication list, you can select to automatically create a new communication record. The document is saved as an attachment to the communication.

* The System Administrator can restrict the type of files you can upload. For example, prohibiting EXE or BAT files.

> The Document Drop icon is only available when working with Sage CRM in Internet Explorer. Your System Administrator can enable/disable access to the plug-in required for Document Drop for all users from **<My Profile> | Administration**. Chrome and Firefox users can use the Drop Files Here area.

The Document Drop icon is available in the following tabs.

- My CRM Calendar tab
- Team CRM Calendar tab
- Company Communications tab
- Person Communications tab
- Lead Communications tab
- Opportunity Communications tab
- Case Communications tab.
- Solution Communications tab

- Quote Communications tab
- Order Communications tab
- Any Documents tab

Drop Files Here area

The Drop Files Here area provides a clear drag-and-drop zone for adding files to Sage CRM.

> This area isn't available when working with Sage CRM in Internet Explorer or Safari. The Document Drop feature provides similar functionality for users working in IE. Safari users can drag-and-drop onto **Add File**.

Drop Files Here is available in:

- Any **Documents** tab.
- Task **Attachments** tab.
- The **Select Or Create a New Template** screen when performing a mail merge.
- **My CRM | Shared Documents** if you're a System Administrator or Info Manager with Document Library rights.
- **<My Profile> | Administration | Email and Documents | Document Templates**.

To upload successfully, the files must comply with the system file size, type, and number of files settings. These are defined by your System Administrator.

Linking email correspondence to a customer

You can link email correspondence to a Customer record using Document Drop (IE only).

1. Find and open the Customer record.
2. Click the **Communications** tab.
3. Tile the windows on your desktop and use the mouse to drag the required email onto the **Document Drop icon**. The Enter New Task page is displayed.
4. **Action type** is automatically set to **Email In**. Enter the rest of the details and click **Save**.The new communication is displayed in the Communications list for the company.
5. To review the email, click the **Email** icon and then click **View Attachment**.

You can also link email correspondence to customer records in Sage CRM using Outlook Integration and Email Management.

- **Outlook Integration**. If Classic Outlook integration is installed on your system, you can use **File Email** from Outlook to file an inbound email communication with the customer record in Sage CRM. For more information, see Classic Outlook integration (page 8-1).
- **Email Management**. If Email Management is installed on your system, inbound emails are automatically filed against the matching Person or Company record. For more information, see Filing inbound and outbound emails (page 6-3).

Dropping a document onto the Documents tab

1. Open the record that you want to link to the document.
2. Click the **Documents** tab.
3. Reduce the size of your Sage CRM window.
4. Click and drag the document from the current location.
    - In IE, drag the document to the **Document Drop** icon.
    - In Chrome or Firebox, drag single or multiple files to the **Add File** button or the **Drop files here** area.
    - In Safari, drag single files to the **Add File** button.
5. Enter the document details and click **Save**.

Shared documents

All users can access the **Shared Documents** tab. It stores corporate documents that you may need quick access to on a daily basis. However, you may not have access to all documents on the **Documents** tab.

Accessing shared documents

1. Click **My CRM | Shared Documents**.
2. Click the **View Attachment** icon beside the file you want to open. Alternatively, click the document and then click **View Attachment** on the **Document Details** screen.

Filtering shared documents

If the default list of documents in the **Shared Documents** tab is long and difficult to manage, use the filter box on the right-hand side of the screen to filter the list according to a number of criteria.

These steps search for a sales letter.

- Select **Letter** from **Type**.
- Click **Filter**. Only documents of type Letter are displayed, making it easier for you to find the letter you need.

Adding documents to the Shared Documents tab

User Requirement: Info Manager with Document Library Rights

1. Click **My CRM | Shared Documents**.
2. Click **Add File**.
3. Browse to the file.
    - In IE, click **Browse** to navigate to the file.
    - In other browsers, select the file from its current location. **Note**: When using Safari, you can add only one file at a time.
    - The file is listed in **File(s)**. A green check mark indicates that it was uploaded. 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. Click **Add File** to add more files.
5. Enter the document details, such as which teams can view it, and if it's associated with a particular entity.
6. 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.

Editing documents in the Shared Documents tab

User Requirement: System Administrator or Info Manager Administration Rights

1. Click the **My CRM | Shared Documents**.
2. Find the document you want to edit and click the document link.
3. Click **View Attachment** to download the attached document.
4. Open the document, make your changes, and save the document locally to your computer. Note the document filename.
5. Return to Sage CRM. Click **Delete** and **Confirm Delete** to delete the existing document.
6. Click **Add File** to upload the updated document.
7. Click **Save**.

Chapter 10: Writing reports

- Introduction to writing reports
- Creating and managing a report category
- Moving a report to a different category
- Creating a list report
- Report fields and buttons
- Chart styles
- Adding a chart to a report
- Creating a cross tabular report
- Creating a historical report
- Cloning a report
- Adding a new report style
- Deleting a report

Introduction to writing reports

User Requirement: Information Manager rights

When creating a new report, you can make use of the following features in the report editor:

- An extensive list of Report Sources, which you can expand using the **Views Customization** functionality.
- A choice of List, Cross Tabular, or Historical report types.
- Set the number of Rows Per Page on list reports to improve the layout of the report output.
- The ability to add a chart to the report.
- The ability to use of sums, averages, groups, and record counts.
- The ability to format data to make use of hyperlinks and number formats.
- Display header and footer information, such as the user who has run the report and the date/time it was run.
- Create private reports, available only to you.

Creating and managing a report category

User Requirement: Information Manager rights

A user with rights to create new reports can create new report categories.

1. Click **My CRM | Reports**.
2. Click **New Report Category**. The New Report Category page is displayed.
3. Enter a name and a description for the new report category and click **Save**. The new report category is displayed.

4. To translate the report name and description into other languages, click **<My Profile> | Administration | Customization | Translations**.

> You must be a System Administrator to delete a report category, change the order of the report categories, or change the report category icon. These changes can be made in **<My Profile> | Administration | Advanced Customization | System Menus**. For more information, see the *System Administrator Help* .

Moving a report to a different category

1. Click **My CRM | Reports**.
2. Select the category that contains the report you want to move.
3. Click **Edit** for the relevant report.
4. Select the new report category from the **Report Category** drop-down menu.
5. Click **Continue**. The Search Criteria for Report page is displayed.
6. Click **Continue**. The Report Options, Step 2 of 2 page is displayed.
7. Click **Save**. The report is moved to the selected report category.

Creating a list report

User Requirement: Information Manager rights

This example creates a list report showing people and their associated contact details.

Report columns should include:

- Person : Last Name
- Person : First
- Person : Salutation
- Person : Title
- Address : City
- Person : Business email
- Person : Area Code
- Person : Phone
- Company : Company Name

Further specifications include:

- **Sort On**—Person : Last Name, Company : Company Name
- **Search Criteria**—Person : Title Code, Company : Territory, Company : Account Manager

1. Click **Reports**.
2. Select the category in which you want to create and save your report, for example, **General**.
3. Click **New**. The Report Options, Step 1 of 2 page is displayed.

4. Complete the Report Details panel. When you click **Source View**, the page expands to show the Click Column panel, and a panel showing lists of columns for content, searching, sorting and grouping.
5. Select the columns to use for the report contents. To use a column for the Search or Sort or Group By criteria, click the corresponding button. For more information, see Report fields and buttons (page 10-3).
6. Click **Add Key Attribute Data**. A pop-up window, Add Key Attribute Data, is displayed.
7. Select the column, field, and entity to report on, then add to either the Report Contents, Search Criteria, or both.
8. Click **Continue** to return to the Report Options, Step 1 of 2 page and click **Continue** to proceed to the next stage. The Search Criteria for Report page is displayed.
9. Specify search criteria. For example, only People where you're the Account Manager.
10. Click **Continue**. The Report Options, Step 2 of 2 page is displayed. The page consists of multiple report formatting fields. For more information, see Report fields and buttons (page 10-3).
    - Title Settings
    - Header Settings
    - Summary Settings
    - Footer Settings
    - Sort Orders
    - Column Formatting
    - Chart Options
11. Complete the information on the panels and click **Save**. The new report is displayed in the list of reports.
12. To run the report, click **Run** or click the report. The Search Criteria page is displayed.
13. Select your search criteria and click **Run** to continue, or **Save** to save the selected search criteria before continuing. The report is displayed in a new browser window. The search criteria are displayed at the top of the report output.

Report fields and buttons

- Report Details panel fields
- Select Column panel buttons
- Report Formatting panel fields
- Chart Options panel fields

Report Details panel fields

User Requirement: Information Manager rights

Field	Description
Name	The name of the report. This must be unique within all users and categories.
Source View	The name of the view used for this report. The source view provides the database source of the fields contained in a report. You can typically select the Summary view of the main entity for which you're creating a report, for example, Opportunity for an opportunity report. This should give you the fields you need. A view is a selection of fields from a number of tables. For example, a Customer Service report may need to display data from both Case and Company tables. To decide which view to use, first identify what fields you need to use, and then look at what tables / entities these fields are on by looking at the fields in Sage CRM. For example, for an opportunity report, do you need to display any Company fields? Look at the list of views in the Source View selection list to see what view would most suit your field selection. Selecting on one of these will display the fields in this view. If no suitable view exists in the system,then the Sage CRM Administrator can create a new view or can edit an existing one to add all the required fields. Please see *View Customization* in the *System Administrator Guide* for more details.
Report Type	Select from List, Cross Tab, or Historical.
Report Style	Select from Standard With Grids or Standard Without Grids. The gridlines appear on the chart section of your report output. The System Administrator can define further styles and make them available from this field.

Field	Description
Rows Per Page	This setting is displayed for list reports on onscreen output only. Set the number of rows per page. When this setting is set, the first page is displayed as soon as it is generated, with arrows at the top to go to the next or last page. If you click Next or Last page before that page has been generated, a message is displayed, advising that the page is not yet ready. Once the whole report has been generated, a Go To page icon is displayed at the top of the page. **Note**: The rows per page setting doesn't count the report header, title, and footer as rows. For example, 20 rows per page means 20 rows of data per page, including total lines, blank lines, and charts. A Print Preview icon is also available, which opens a new window containing the full report as a PDF.
Description	A free text description of the report.
Private Report	Select this option to make a report you created private.Other users will not see the report in the Report list.
Auto Hyperlinking	Create links from the report contents to the relevant records in Sage CRM. For example, click a company name on the Report Output page to open the company's summary page. • Auto Hyperlinking only applies when the report is run onscreen. • This field is not available for historical and cross tab reports. • The hyperlinks are only available on some fields. These fields are predefined in Sage CRM for each entity.

Field	**Description**
Show Original Currency Values	Display the currency values entered in the system, rather than your own preferred currency. Only available if working with multi-currency systems, if the **Single Currency** field is set to No in **<My Profile> | Administration | Data Management | Currency Configuration**). **Note**: Currency fields display in reports to the decimal precision defined by the System Administrator in the Base Currency. Numeric fields display in reports to the decimal precision defined in **<My Profile> | Preferences**.
Filter By Current User	Allows the user creating the report to limit the returned data to be applicable to the current logged on user. For example, the report output of a Communication List report, will automatically be restricted to show Communications scheduled for the logged on user.
Filter By User's Primary Team	Allows the person creating the report to limit the returned data to be applicable to the logged on user's Primary Team. For example, the report output of an Opportunity List report will automatically be restricted to show Opportunities assigned to the Primary Team of the logged on user.
Filter By User's Home Territory	Allows the person creating the report to limit the returned data to be applicable to the logged on user's Home Territory. For example, the report output of an Opportunity List report will automatically be restricted to show Opportunities in the Home Territory of the logged on user.
Select Distinct Values	Removes duplicate rows in the report output. For example, if you have a report that lists all companies that have "High" priority Cases, and there are two high priority Cases with the company Design Right, Design Right appears twice in the report output. However, if you choose the option Select Distinct Values for this report, Design Right only appears once.

Select Column panel buttons

User Requirement: Information Manager rights

These are on the Report Source page.

Button	Description
Add To Report Contents	Adds the column to the Report Contents list. These will make up the report columns (the first item in the list will make up the first report column on the left hand side of your report, the second item the next column along, and so on).
Add To Search Criteria	Adds the column to the Search Criteria list. These will be the criteria that you can filter your report output by. In the example above, selecting Assigned To as a search criteria means that when you run the report, you can decide to view opportunities for just one or a selection of Sales Reps. In the report designer, you cannot delete fields from the Search Criteria list if the report has saved searches. Please refer to the Saving report search criteria (page 11-4) for more information.
Advanced Find	Allows you to use the Advanced Find feature to create the report. When Advanced Find is selected the next screen displayed will be the Advanced Find page, where you can create complex queries to return specific report results. For more details on using advanced find, please refer to Using Advanced Find (page 3-5).
Add To Sort On	Adds the column to the Sort On list. The report will be sorted by this column. If there are multiple columns in this list, the report will sort first by the column at the top of the list, then by the next column. Note that if you have added Group By columns, these will make up the "primary" sort order. The columns within the Sort On list determine the sort order within the group.

Button	Description
Add to Group By	Adds the column to the Group By list. The report results will be grouped by the columns in this list. In the above example, the opportunity list is grouped by Sales Rep (Opportunity Assigned To). Note that you do not need to select the Group By column as one of the Report Contents columns. The Group By selection creates its own column as the very first left hand column of the list report.
Add Key Attribute Data	Key Attribute data can also be added to the report. For example, if you have Key Attribute data set up to track subscribers to a Partner Newsletter, this can be included in the report contents.

Report Formatting panel fields

User Requirement: Information Manager rights

Field	Description
Title	The title displayed on the report. This is also the name of the Chart gadget on the Interactive Dashboard. If you clone a report with a chart in it, you should update the chart title in the cloned report.

Field	**Description**
Left Content (Header)	The header appears at the very top of the report before any other details. The header and footer are divided into three sections; left, center, and right. The same set of options can be displayed on each section: • **Date**. Current date, formatted according to the user's preferences. • **Date Time**. Current date and time formatted according to the user's preferences. • **Logo**. Displays a logo. The logo must be a file called **LOGO.JPG** for onscreen output, or **PDFLOGO.JPG** (usually a higher resolution image) for Adobe PDF output.These are located in the Reports directory. The logos aren't used in CSV or MS Excel output. • **Page Number**. Displays the page number on HTML and Adobe reports. • **Report Title**. Displays the title of the report. • **Time**. Current time, formatted according to the user's preferences. • **User Name**. The name of the user who's running the report. For more information on customizing FusionCharts, please refer to *Customizing Report Charts* in the *Themes* section of the *System Administrator Guide*.
Centre Content (Header)	
Right Content (Header)	
Show Summary Data	If checked, the grand totals are displayed.
Left Content (Footer)	The footer appears at the very end of the report underneath all other details. See above.
Centre Content (Footer)	See above.
Right Content (Footer)	See above.
Group Orders	This section is only displayed if columns have been added to the Group By list on the Report Options, Step 1 of 2 page. See "Sort Orders" below for an explanation of the three columns.

Field	Description
Sort Orders	This section is only displayed if columns have been added to the Sort On list on the Report Options, Step 1 of 2 page. Each field is listed in a grid in three columns. The first column displays the name of the field and the second column displays a check box with the column heading "Descending". If this check box is selected, the field is sorted in descending order. The default is in ascending order. The third column gives you the option to sort by Caption Order or by Translation Order. When you create drop-down list captions, it is possible to specify the order that they appear in using the Caption Order field in Translations. This is the order that will be used if you select Caption Order. Translation Order is the alphabetical order of the actual translation of the column in the language of the user running the report. If neither is selected, the default is alphabetically on the Caption Code.
Column Formatting	This section lists all of the columns (except Group By columns) that are displayed on the report. For each field listed there are three options. The first option is the name of the field, the second option allows you to specify a total for the column. There are five types of totals, Average, Count, Maximum, Minimum, and Sum. All five types are available if the field is a numeric field. For non-numeric fields only Count is available. The third option is for alignment, there is a radio-group with three options: left-justify, center-justify, and right-justify.

Chart Options panel fields

User Requirement: Information Manager rights

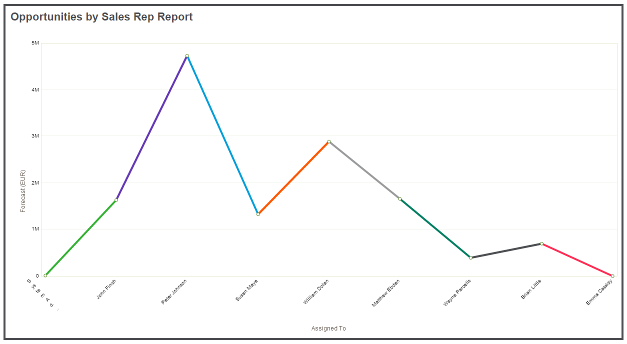
Field	Description
Show Chart	Check to show a chart.

Field	**Description**
Available On Classic/ Interactive Dashboard	When checked, the chart is available for selection from the Report Charts category on the Classic or Interactive Dashboard. Refer to Adding report charts to a classic dashboard (page 23-5) or Chart gadget (page 22-10) for more information.
Chart Style	The type of chart you want to display. Available styles include Point, Fast Line, Line, Bar, Area, Horizontal Bar, Pie, Doughnut, Pyramid, Funnel, Stacked, Gauge, and Combination. Please refer to Chart Options panel fields (page 10-10) for examples.
Show Legend	Toggles the legend display on or off.
Legend Alignment	Aligns legend bottom, top, left, or right.
Value	Indicates what column is to be used for the left axis of the chart.
Label	Chart label for the left axis. If this is blank the translated field name is used.
Function	Indicates what totaling function to use on the left field. The returned values of the left field must be numeric. Valid options for this field are Average, Count, Minimum, Maximum, and Sum. Only numeric fields have all five options, non-numeric fields have the Count option only. Because the returned value must be numeric, non-numeric fields always have the Count option selected. Numeric fields can also specify no totaling since the underlying field value is numeric.
Category	The field to be used for the bottom axis of the chart.
Label	The caption to be used for the bottom axis. If this is blank the translated field name is used.
Function	Only applicable if the Category field is a date/time field. Allows the value of the field to be split up into date ranges like month names.
Line	Indicates the column to be used for the line on a Combination chart.

Field	**Description**
Label	Chart label for the line on a Combination chart.
Function	Indicates the totaling function used for the line on a Combination chart. Valid options for numeric fields are Average, Count, Minimum, Maximum, Sum, and Value (no totaling function). Non-numeric fields must be set to Count because the returned value must be numeric.
Group By	If a Group By option was selected in the Report Options Step 1 of 2 page, this field is displayed on the Chart Options panel. It displays a separate chart per grouping.
Multi-Bar	If the Group By field is filled in the Chart Options, a further field, Multi-Bar, is displayed. This displays all the groups on each chart.
Segment 1 Lower Limit %	The starting value of the first partition in the gauge chart. This is a percentage of the target value. For example, if your target is 100%, you might set the lower limit to 33%. Set the color of the first partition in **Segment 1 Color** and the name of the partition in **Segment 1 Caption**.
Segment 2 Lower Limit %	The starting value of the second partition in the gauge chart. This is a percentage of the target value. For example, if your target is 100%, you might start the second partition at 66%. The end value of the second partition is your target which is automatically taken from your forecast for the relevant period. For more information, see Forecasts. Set the color of the second partition in **Segment 2 Color** and the name of the partition in **Segment 2 Caption**.

Field	Description
Segment 3 Upper Limit %	The end value of the third partition in the gauge chart. This is a percentage of the target value. For example, if your target is 100%, you might end the third partition at 133%. The starting value of the third partition is your target which is automatically taken from your forecast for the relevant period. For more information, see Forecasts. Set the color of the third partition in **Segment 3 Color** and the name of the partition in **Segment 3 Caption**.
Segment 1 Color	The color of the first partition in the gauge chart.
Segment 2 Color	The color of the second partition in the gauge chart.
Segment 3 Color	The color of the third partition in the gauge chart.
Segment 1 Caption	The name of the first partition in the gauge chart.
Segment 2 Caption	The name of the second partition in the gauge chart.
Segment 3 Caption	The name of the third partition in the gauge chart.

Chart styles

Chart Style	Example
Point, FastLine, Line	

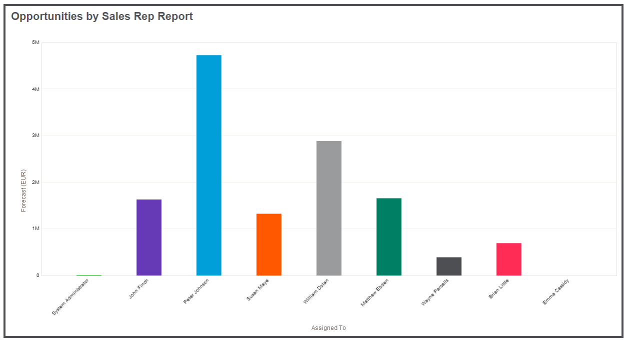
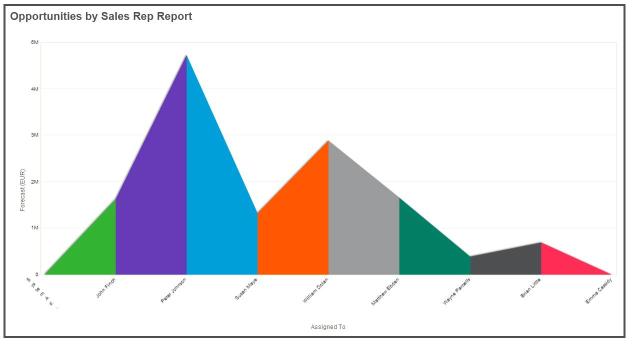
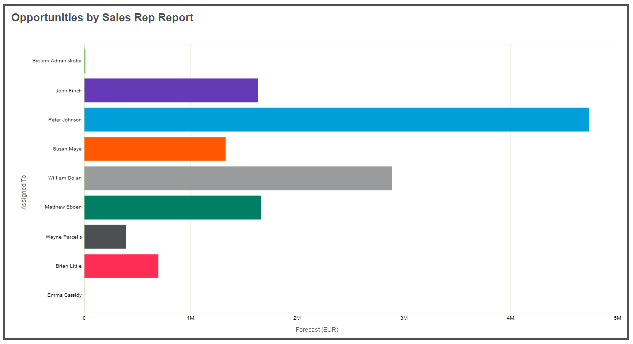
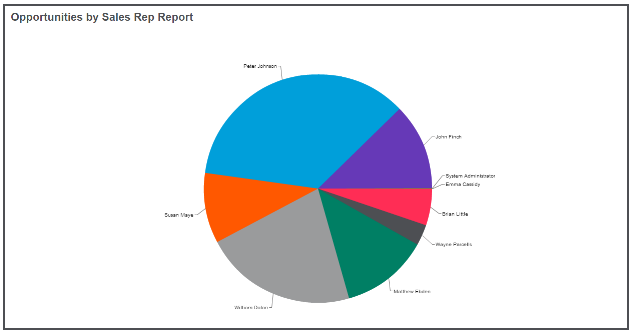
<table>
<tr><th>Chart Style</th><th>Example</th></tr>
<tr><td>Bar</td><td>
</td></tr>
<tr><td>Area</td><td>
</td></tr>
<tr><td>HBar</td><td>
</td></tr>
<tr><td>Pie</td><td>
</td></tr>
</table>

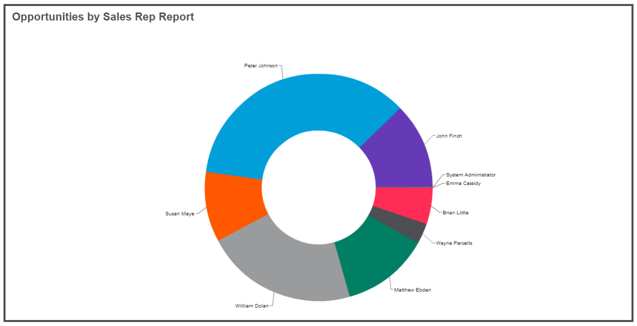
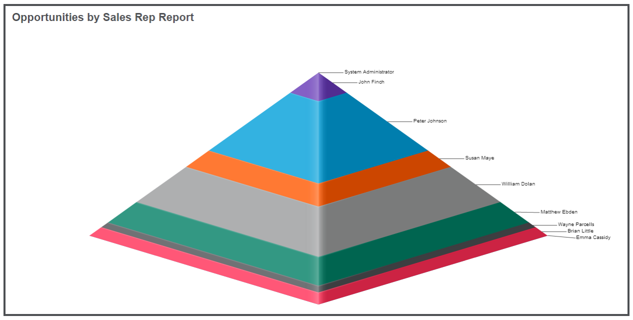
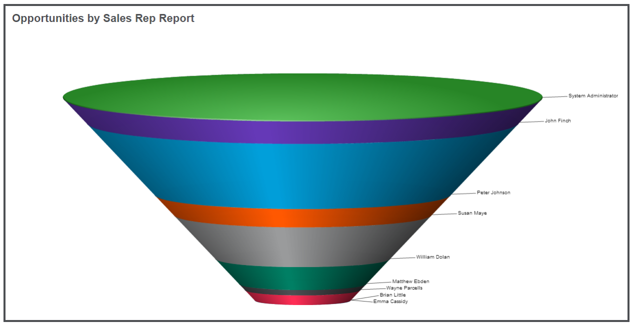
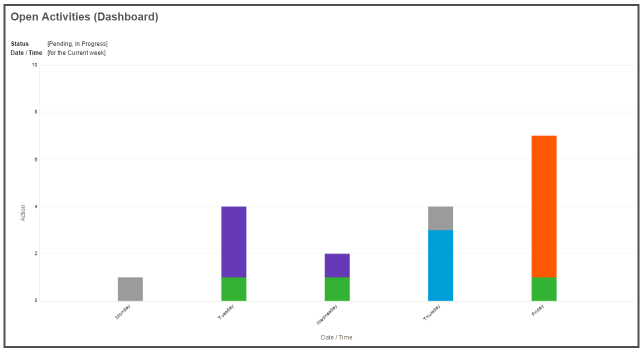
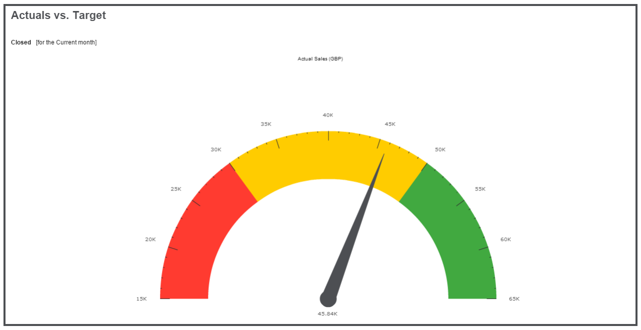
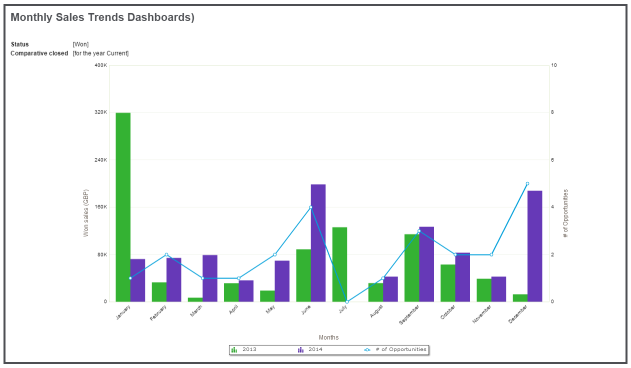
Chart Style	**Example**
Doughnut	
Pyramid	
Funnel	
Stacked Bars are stacked on top of each other to display grouped data. It provides a wider view of data than a regular bar chart. A stacked chart is useful in an *Open Activities* activity report to show several actions that occurred on a particular day or date.	

Chart Style	Example
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. You could also use a gauge chart in a customer service report to show how you're performing against your SLA target.	
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. You could also use a combination chart in a customer service report to show the number of cases opened compared to the number of cases closed in the system for the current year.	

Adding a chart to a report

User Requirement: Information Manager rights

The Chart Options section of the Report Options, Step 2 of 2 page allows you to add and define a chart for your report. The chart uses the same view as the rest of the report, but you can specify different fields for the chart than you did for the report.

Example: Forecast Value by Sales Rep

This example demonstrates how to add a chart to an opportunity list report to show the Total Forecast Value by Sales Rep as a horizontal bar chart.

First, create the list report based on the Opportunity Summary Report Source according to the following specifications.

Report columns should include:

- Company : Company Name
- Person : Person
- Opportunity : Description
- Opportunity : Stage
- Opportunity : Status
- Opportunity : Close By (date)
- Opportunity : Certainty%
- Opportunity : Forecast (summed)

Further specifications include:

- Search criteria of Opportunity : Assigned To, Opportunity : Stage, Opportunity : Status, Opportunity : Close By, and Opportunity : Forecast.
- Grouping by the Sales Rep (Opportunity Assigned To) in order to get the Forecast totals by Rep.
- Sorting by Opportunity Assigned To and the Forecast amount.
- Right justify numerical columns.

To add the chart:

1. Click **Change** next to the report you want to add the chart to. The Report Options, Step 1 of 2 page is displayed.
2. Click **Continue**. The Search Criteria for Report page is displayed.
3. Click **Continue**. The Report Options, Step 2 of 2 page is displayed.
4. Scroll to the Chart Options panel of the page.
5. Complete the details in the Chart Options panel and click **Save**. Refer to Report fields and buttons (page 10-3) for information on the Chart Options fields.
6. To view the chart, run the report.

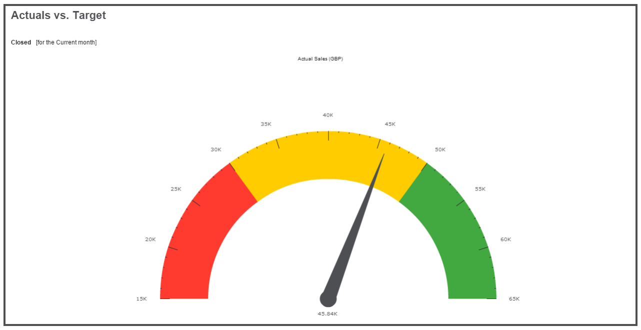
To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server. Ask your System Administrator to install this software.

Example: Adding a gauge chart to a sales report

User Requirement: Information Manager rights

You can use a gauge chart in many types of report. This example creates a gauge chart and adds it to an Actual vs Target Sales report. The first step is to set up a forecast because the chart uses your forecast target to create partitions. If you can't access the **Forecasts** tab, contact your system administrator. The partitions illustrate how your actual sales compare to your forecast target. Depending on how you've configured the chart, the first partition could indicate that you are very below target, the second partition could indicate that you are approaching your target, and the third partition could indicate that you've exceeded your target.

A gauge chart is also useful in a customer service report to show how you're performing against your SLA target.



1. Set up a forecast.
2. Click **Reports**.
3. Click **Sales** and click the pencil icon in the **Edit** column beside **Actual vs Target**. The Report Options, Step 1 of 2 page is displayed. This report uses the default source view **Sales Vs Forecast**.
4. Click **Continue**. The Search Criteria for Report page is displayed. Specify the duration on which you want to report.
5. Click **Continue**. The Report Options, Step 2 of 2 page is displayed.
6. Scroll to the Chart Options panel to configure the partitions in the gauge chart.
   - Ensure **Chart Style** is set to **Gauge**.
   - Choose the data that's used to set the gauge pointer in **Value**.
   - Choose the data that's used to set the target value in **Category**.
   - Set the starting value of the first partition in **Segment 1 Lower Limit %**. This is a percentage of the target value. For example, if your target is 100%, you might set the lower limit to 33% so this partition indicates that you are very below target. Set the color of the first partition in **Segment 1 Color** and the name of the partition in **Segment 1 Caption**.

   - Set the starting value of the second partition in **Segment 2 Lower Limit %**. This is a percentage of the target value. For example, if your target is 100%, you might start the second partition at 66% so this partition indicates that you are approaching your target. The end value of the second partition is your target value which is automatically taken from your forecast for the relevant period. Set the color of the second partition in **Segment 2 Color** and the name of the partition in **Segment 2 Caption**.
   - Set the end value of the third partition in **Segment 3 Upper Limit %**. This is a percentage of the target value. For example, if your target is 100%, you might end the third partition at 133%. The starting value of the third partition is your target which is automatically taken from your forecast for the relevant period. So this partition indicates that you've exceeded your target. Set the color of the third partition in **Segment 3 Color** and the name of the partition in **Segment 3 Caption**.

7. Click **Save**. To run the report and view the chart, click the arrow in the **Run** column beside **Sales Vs Forecast**.

To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server. Ask your System Administrator to install this software.

Example: Adding a combination chart to a customer service report

User Requirement: Information Manager rights

You can use a combination chart in many types of report. This example creates a combination chart that reports on customer case activity and adds it to a customer service report. A bar chart displays the number of cases that each user opened and a line chart displays the number of cases that each user closed for the current year.

A combination chart is also 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.

1. Click **Reports** .
2. Click **Customer Service** and click **New**.
3. Complete the fields to create a new list report. You'll need a source view that compares cases opened this year against cases closed this year. For information about creating views, see the System Administrator Guide.
4. Ensure **Report Contents** includes
   - *Cases: case_comparitive_year*
   - *Cases: case_comparative*
   - *Cases: case_count_closed*
   - *Cases: case_count_opened*
5. Ensure **Search Criteria** includes *Cases: Created Data*.
6. Ensure **Group By** includes *Cases: Assigned To*.
7. Click **Continue** to proceed to Reports Options, Step 2 of 2.

8. Scroll to the Chart Options panel to configure the combination chart.
    - Set **Chart Style** to **Combination**.
    - Set **Value** to **Cases: case_count_opened** and set **Function** to **Sum**.
    - Set **Category** to **Cases: Assigned To** and set **Function** to **Value**.
    - Set **Line** to **Cases: case_count_closed** and set **Function** to **Sum**.
    - Set **Multi-Bar** to **No** and click **Save**.
9. Click **Save**. To run the report and view the chart, click the arrow in the **Run** column beside your new report.

To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server. Ask your System Administrator to install this software.

Creating a cross tabular report

User Requirement: Information Manager rights

Example: Opportunity Stage by Sales Rep

This example demonstrates how to create a cross tabular report, which shows Opportunity Stage by Sales Rep (Opportunity Assigned To).

The report should show the sales reps from left to right across the top of the report, and the stages down the left-hand side of the report.

1. Click **Reports** and click the **Sales** report category.
2. Click **New**. The Report Options, Step 1 of 2 page is displayed.
3. Select the Source View, and then **Cross Tab** from the Report Type field.
4. Complete the details on the rest of the page. The fields are described in the List Report example on the previous page.
5. There is a field called Cross Tab, which is only displayed when building a cross tabular report. This defines the columns displayed horizontally (from left to right) on the table. The Report Contents defines the information displayed vertically in the table.
6. Click **Continue** and complete the information in the Report Options, Step 2 of 2 page.
7. Click **Save**. The new report is displayed in the list of reports.
8. To run the report, click **Run**. The output is displayed in a new browser window.

Creating a historical report

User Requirement: Information Manager rights

To create a report which shows, for example, opportunities opened during July, which were subsequently closed within the same quarter (July - September), you can create a historical report.

To set up and run this report:

1. Click **Reports**.
2. Select the category to which you want to add your new report. For example, Sales.
3. Click **New**. The Report Options, Step 1 of 2 is displayed.

4. Give the report a name, for example, Opportunity Opened and Closed.
5. Select the report source as **Opportunity Summary**.
6. Set the report type to **Historical**. The panels below the Report Details are changed to reflect this type of report.
    - The **In Range** field should reflect the type of start date you're measuring, in this case, Opportunity : Opened. You can also use the Opportunity : Created Date. The former is set by the system but can be changed by the end user. The latter is set by the system and cannot be changed by the user. The way in which you structured your sales process and workflow determines which date to report on.
    - The **Out Of Range** field can be used to form a logical pair with the In Range field. For example, if you select the In Range field as Opportunity : Opened, and the Out Of Range field as Opportunity : Closed, when you report over a period of, for example, one quarter, the report will return the number of opportunities still open at the end of that quarter.
7. For this report, we're more interested in what has closed within the specified time frame, so you can leave the Out Of Range field blank, but add the Opportunity : Closed to the Search Criteria of the report. You can also add the Opportunity : Status to Search Criteria.
8. The **Date Partition** field divides the report results into sections within the In Range date specified. Since our In Range date will cover a month time period, it would be useful to divide the results by week. You can do this by setting the Date Partition field to **Week**.
9. Click **Continue**. The Search Criteria for Report page is displayed.
10. The In Range date is automatically displayed as the first search criteria. Specify the date range for **Opportunity Opened**, such as between 01 July and 31 July.
11. Specify the **Opportunity Closed** date range, such as between 01 July and 30 September.
12. Add the **Opportunity Status** search criteria, for example, Won.
13. Click **Continue**. The Report Options, Step 2 of 2 page is displayed.
14. Complete the Header and Footer settings and Chart Options. A line chart will be displayed by default.
15. Click **Save**. The report is displayed in the list of reports.
16. Click the report or click **Run** to run the report. The report Display Options page is displayed.
17. Select the appropriate display options. You can also re-set the report search criteria if you want.
18. Click **Run**. The report output is displayed in a new browser window. The report output shows the number of opportunities that were opened in July, which were closed and won within the Q3 (Jul - Sep) period.

The total number of opportunities opened from the 1st of July to the 31st of July, which were subsequently won, is the number shown on the last week of the selected time period (not the total of all the weeks). The weekly totals give you a point-in-time snapshot for the whole "opened" period being measured.

Cloning a report

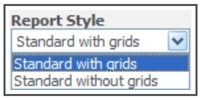
User Requirement: Information Manager rights

1. Click **Change** next to the report you want to clone. The Report Options, Step 1 of 2 page is displayed.
2. Click **Clone**. The old report title is displayed with **Copy of** in the title.
3. Type in the new report name. This must be unique.
4. Click **Save**. The Report Options, Step 1 of 1 page is displayed so that you can complete the modifications to the cloned report.

Adding a new report style

User Requirement: Info Manager Administration Rights

The System Administrator can expand the list of standard report styles by copying and editing an existing style, and making it available in the Report Style drop-down list.



Report Style drop-down

To create a new report style:

1. Go to the Reports subdirectory of your CRM installation.
2. In this directory there are a number of *.XSL (Extensible Style-sheet Language) files, which define the existing two styles for the desktop and WindowsCE browsers. The files should have the same name, ending with PC or CE for desktop and WindowsCE browsers respectively. There are also CSS files which are referenced by the PC *.XSL files.
3. Copy, for example, the STDGRIDSPC.XSL and the STDGRIDS.CSS files and rename them with a new style name.
4. Edit the *.XSL file and *.CSS file. The *.XSL file controls the structure of the report and the *.CSS file controls the look and feel of the report. Make sure you change the LINK tag in the new XSL file to point to the new CSS file.
5. **Save** the changes you have made. To create a translation for the new styles so that they appear in the Report Style field:
6. In CRM, click the **Administration** button.
7. Click **Translations** from the context area of the screen. The Find screen is displayed.
8. Click **New**. The Translation input page is displayed.
9. Enter the Caption Code, which must be the same as the file names (without the PC or CE).
10. Enter the Caption Family as **ReportStyles**.
11. Enter the Caption Family Type as **Choices**.
12. Add the translations for the languages used in your organization.
13. Click **Save**.
14. Test the new style by creating a new report. The new style appears in the Report Style field and your report output should reflect the style changes.

Deleting a report

User Requirement: Information Manager rights

1. Click **Change** next to the report you want to delete. The Report Options, Step 1 of 2 page is displayed.
2. Click **Delete**, then **Confirm Delete**. The report is deleted and no longer appears in the report list.

Chapter 11: Running reports

- Sample reports
- Running a report
- Saving report search criteria
- Adding favorite reports
- Changing report display options
- Interacting with report charts

Sample reports

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

There are three types of standard reports:

- **List**. Creates rows and columns of information based on the criteria selected.
- **Cross Tabular**. Creates a record count across an X and Y axis based on the criteria selected.
- **Historical**. Creates a report giving a static view of a record at previous points in time.
- **Summary reports** show a quick overview of account information. They're available from the Summary tabs of:
  - Companies
  - People
  - Opportunities
  - Cases

> If you've appropriate permissions you can also generate report output from any search list, saved search, or group.

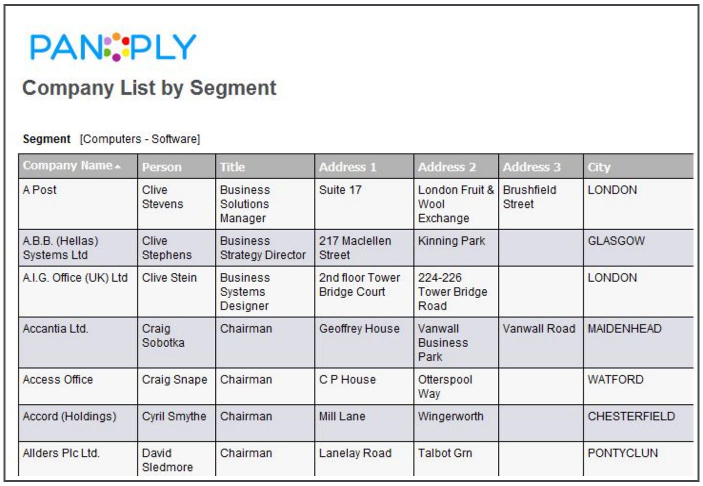
Company list by segment (List)

This report displays a list of companies in selected industry segments. For example, all companies in the computer - software segment. To run the report:

1. Click **Reports** .
2. Click the **General** report category.
3. Click **Company List by Segment** or click **Run** next to the report name.
   The report output is displayed onscreen by default. Leave the **on-screen** option selected for this example.
4. Select criteria for the report. If you leave the search criteria blank,the results return all the permitted values. To select multiple criteria on the right-hand side of the panel, hold the **Ctrl** key and click the individual entries.
5. Click **Go**. The Company List by Segment report is displayed in a new window.

Understanding more about your report

- The search criteria are displayed at the top of the report output.
- The report output page may link to data to the corresponding Summary pages. For example, if the report contains hyperlinks, you can click a company name to go to that company Summary page.



Company List by Segment

Segment [Computers - Software]

Company Name ▴	Person	Title	Address 1	Address 2	Address 3	City
A Post	Clive Stevens	Business Solutions Manager	Suite 17	London Fruit & Wool Exchange	Brushfield Street	LONDON
A.B.B. (Hellas) Systems Ltd	Clive Stephens	Business Strategy Director	217 Maclellen Street	Kinning Park		GLASGOW
A.I.G. Office (UK) Ltd	Clive Stein	Business Systems Designer	2nd floor Tower Bridge Court	224-226 Tower Bridge Road		LONDON
Accantia Ltd.	Craig Sobotka	Chairman	Geoffrey House	Vanwall Business Park	Vanwall Road	MAIDENHEAD
Access Office	Craig Snape	Chairman	C P House	Otterspool Way		WATFORD
Accord (Holdings)	Cyril Smythe	Chairman	Mill Lane	Wingerworth		CHESTERFIELD
Allders Plc Ltd.	David Sledmore	Chairman	Lanelay Road	Talbot Grn		PONTYCLUN

Report output page

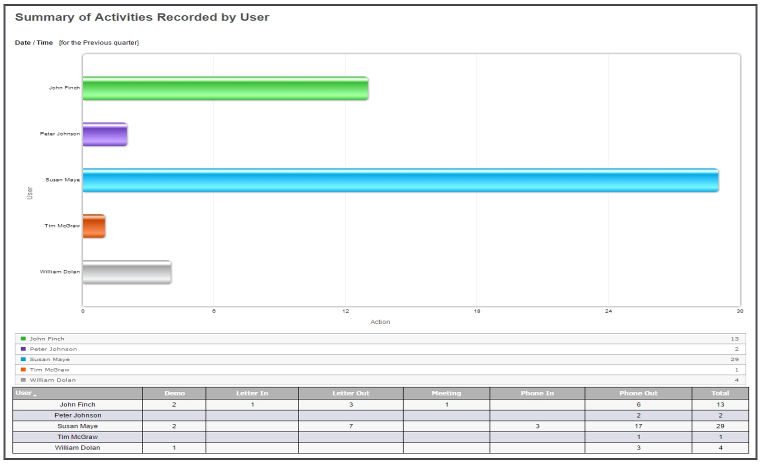
- To navigate the pages of a longer report, use the navigation buttons at the top of the page. The first page is displayed as soon as it is generated, with arrows at the top to go to the next or last page. If you navigate to other pages before they're generated, a message is displayed to inform you that the page is not ready.
  Once the whole report is generated, a **Go To Page** icon is displayed at the top of the page. A **Print** icon is also available. The navigation buttons are defined in the report builder by the System Administrator or a user with report editing rights.
- To close the report page, close the window displaying the report output.

Activities logged report by user (Cross Tab)

This report shows the number and types of communications logged by specified users. The search criteria includes the Date/Time field from the communication, so that you can review, for example, all communications logged for your team over the last month.

To run the report:

1. Click **Reports**.
2. Click the report category **Activity Reports**.
3. Click **Activities Logged Report by User**, or click **Run** next to the report. The search criteria are combined with logical "AND"s operators.This means, only activities which meet both the Date/Time and User criteria are returned.
4. Select search criteria. For Date/Time, you can choose several date range criteria. For example:
    - An exact date combined with an operator. For example, =, <>, or =>.
    - A specific date range (Between).
    - A relative date, for example, Current Quarter, Next Month, Previous Week.These are all relative to today’s date.
    - A given date, for example, any Monday between the 1st of November and the 30th of November.
5. Select the users whose activities you want to report on.
6. Click **Go**. The report output is displayed in a new window. This report includes a chart graphic.



Summary of Activities Recorded by User

Date / Time [for the Previous quarter]

🟩 John Finch	13
🟪 Peter Johnson	2
🟦 Susan Maye	29
🟧 Tim McGraw	1
■ William Dolan	4

User	Demo	Letter In	Letter Out	Meeting	Phone In	Phone Out	Total
John Finch	2	1	3	1		6	13
Peter Johnson						2	2
Susan Maye	2		7		3	17	29
Tim McGraw						1	1
William Dolan	1					3	4

Report output page

Opportunity closing history (Historical)

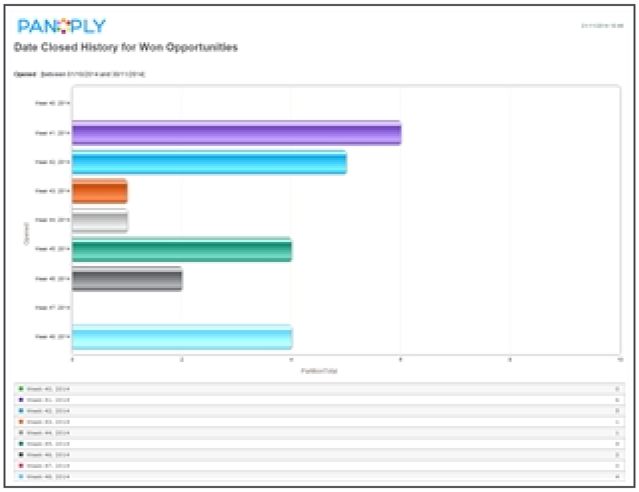
This report shows opportunities that were opened during the specified time period. You can add other search criteria. For example, add **Opportunity Status** to see all opportunities opened between 1st July to 31st July, which were **Won** during that time period or after.

To run the report:

1. Click **Reports**.
2. Click the **Sales** report category.

3. Click **Opportunity Closing History** or click **Run** next to the report.
4. Select the criteria for the report.
5. Click **Go**.

The report output is displayed in a new window. The last week of the selected time period displays the total number of opportunities opened during the month of July and which were zon. The weekly totals give you a point-in-time snapshot for the whole measured period.



Report output page

Person summary report

A Person summary report gives you a quick one-page report with key information about a person. You get their contact details and a summary of the most recent interactions this persons has had with your business.

1. Click **Find | Person**.
2. Search for a Person record and open it.
3. Click **Summary Report**. The person's summary details are displayed in an Adobe PDF file.

Exporting a Company list from a search list

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. Click **Find | 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. Type in a name for the file, and select the format you want the file to be produced in — Excel CSV, CSV, or Text.
4. Click **Save**. The list of companies is exported to a CSV or text file.

Saving report search criteria

If you regularly run reports using the same search criteria, you can save and re-use the search criteria selected.

1. Click **Reports**.
2. Click a report category. For example, **Activity Reports**.
3. Click **Run** next to the report you want to run. For example, **Activities Logged Report by User**.
4. Select the search criteria, and click **Save**. you're prompted to enter a name for the saved search. You can select the **Available to All Users** checkbox to make the saved search available to all users.
5. Enter a short description for the search, and click **Save**. When you return to the list of reports, the saved search criteria is displayed in a list next to the report.

- To run the report using the saved search criteria, click **Run** next to the saved search name.
- 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**, then **Delete**.

Adding favorite reports

You can group reports that you work with regularly in your own personal reports category. To add a report to the My Favorite Reports category:

1. Click **My CRM | Reports**.
2. Click the category where your favorite report is.
3. Select the **Favorite** checkbox next to the report you want to add to the My Favorite Reports category.
4. To view your favorite reports, click the **My Favorite Reports** category.

Changing report display options

You can display a report in the following formats:

- On screen in a pop-up window.
- As an Adobe PDF file.
- **XLSX**. Exports the data to an .XLSX file. Compatible with Excel 2013. Report charts are also displayed.
- **Excel CSV**. Exports the data to a CSV file. This option provides backward compatibility for files prepared from/for Sage CRM prior to 7.1. It also 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"
  ```

- Exported to a CSV file. 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.

XLSX (page 11-6)
Excel CSV (page 11-6)

Adobe PDF

To display report output in Adobe PDF format click **Print Preview** on the **Display Options** panel. The output is displayed in Adobe PDF format.

> You must have the Adobe Acrobat Reader on your machine to view this type of report output. The Reader can be downloaded from http://www.adobe.com. If you're running reports containing extended characters, you must ensure you have the Arial Unicode MS font (ARIALUNI.TTF) installed, otherwise the extended characters will not display. Report charts display as a static image in PDF files.
>
> To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server. Ask your System Administrator to install this software.

To install the font:

1. Copy **arialuni.ttf** from windows\fonts folder to ..\program files\FOP\ folder.
2. Edit the ..\program files\FOP\fonts.bat file, (read the notes inside this file) i.e. replace the placeholder filename with arialuni. Close the batch file and then run it.
3. Copy the resultant XML file into the ..\program files\FOP\Fonts\ folder.
4. Edit the ..\program files\FOP\conf\userconfig.xml file. Add the following lines of xml:

```
<font metrics-file="fonts/ArialUni.xml"
kerning="yes"embedfile="
c:/windows/fonts/ArialUni.ttf"> <font-triplet
name="ArialUnicodeMS"
style="normal" weight="normal"/> <font-triplet
name="ArialUnicodeMS"
style="normal" weight="bold"/> <font-triplet
name="ArialUnicodeMS" style="italic"
weight="normal"/> <font-triplet name="ArialUnicodeMS"
style="italic"
weight="bold"/></font>
```

Make sure the value for the embed-file tag exists (for example, it might be c:\winnt\):

```
embed-file="c:/windows/fonts/ArialUni.ttf"
```

5. Reset IIS.

XLSX

To display report output in XLSX format:

- Select the **XLSX** option from the **Display Options** panel.

  The output is displayed in a XLSX format.

Excel CSV

To display report output in Excel CSV format:

- Select the **Excel CSV** option from the **Display Options** panel.

  The output is displayed in a Excel CSV format.

CSV

To display report output in Comma Separated Value (CSV) format select **CSV** on the **Display Options** panel. The output is displayed in a CSV format.

Interacting with report charts

Report charts using FusionCharts are available with built-in animation and interaction.

Report charts are available when running a report from **Reports** or from a chart gadget on the classic or interactive dashboard. When you run a report, ensure that **Show Chart** is selected in **Report Options, Step 2 of 2**. For more information, see Writing reports (page 10-1).

The built-in animation means you can watch, for example, the bars of a horizontal bar chart grow as the chart is drawn. You can also interact with charts when they are drawn. For example, you can highlight slices of pie charts, and rotate the pie chart to get a better view of the information you require.

To interact with a pie chart once it is drawn:

1. Edit an existing report and make sure it has the Chart Style set to Pie. Save the report, and then run it.
2. Click a slice of the pie chart to highlight it.
3. To rotate the pie chart, right-click the chart and click **Enable Rotation**, then click and drag the chart to its new position.

   The standard drill-down feature of linked charts can also be used.

Chart display options with the Adobe Flash Player

Adobe Flash Player isn't required for running or interacting with report charts. Some enhanced display options, such as greater depth of color, are available in charts when Adobe Flash Player is installed on the client machine. If Flash isn't available, the charts are displayed using HTML 5.

If it is not desirable to use Flash on the client at a customer site, then a custom setting, **ChartUseFlash**, can be set to **N** in the Custom System Parameters table, to only ever allow the display of static images. This should only be carried out by an experienced System Administrator. More information is available on the Sage CRM Community website.

Chapter 12: Working with lists

- Introduction to list actions
- Start mail merge
- New task
- Send emails
- Export to file

Introduction to list actions

To send out a mail shot or schedule several calls in a single action, use the action buttons on the right-hand side of Search lists, Saved Searches, and the **My CRM | Contacts** list .

You can use advanced actions on lists in the **Groups** and **Campaign Management** areas. For more information, see Groups (page 17-1) and Campaign management (page 18-1).

Start mail merge

This example sends a mail shot to all Sage CRM contacts.

1. Click the **My CRM | Contacts** tab. If the contacts list is empty, click **Add Contacts** or **Add Group Of Contacts** to add people to the list.
2. Once you have a list of contacts, click **Merge to Word** or **Merge to PDF**. A list of shared templates is displayed.**Note: New | Merge to Word or Merge to PDF** merge the document for all contacts in the current list.

   If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

3. Click the template you want to use for this mail shot. If you're working with an HTML template, you can make changes to the template before you merge.
4. Make any changes you want to the template. You can insert Sage CRM merge fields by selecting them from the **Insert Sage CRM Field** drop-down box. **Note**: You can click **Preview Merge** to preview how the final merged document will look.
5. When you're happy with your merged document, click **Merge and Continue** to perform the merge. The template is merged with the contact details of each of the contacts in the **Contacts** tab.
6. Print the letters at this point if you want.
7. Return to Sage CRM and complete the details of this communication. A link to the communication record and document is stored against each contact.

New task

This example shows you how to schedule a call to all contacts based in New-York, and where you're the account manager. You can use the results of a search on the Person list.

To schedule the calls:

1. Click **Find | Person**.
2. Enter search criteria. For example, New York in **City** and your name in **Account Manager**.
3. Click **Find**. A list of people matching the search criteria is displayed. A new set of action buttons are displayed on the right-hand side of the page. **Note:** You can also run actions on lists generated from **Saved Searches**. For more information about Saved Searches, see Finding information (page 3-1).
4. Click **New Task**. The Enter Task Information page is displayed. For details of fields on this page, except for the Scheduling Options, see Scheduling a callback (page 5-2). For details of the Scheduling Options, see Scheduling an internal telesales activity (page 18-8).

> **New | Task** on the left -hand side of the page merges a single contact's details with a new task. **New Task** on the right-hand side of the screen creates a new task for each contact in the current list.

5. Complete the information for the scheduled task, and click **Save**. Pending tasks are displayed in the **Calendar** tab of the user they are scheduled for.

Send emails

This example shows you how to send an email blast to all contacts on a Saved Search list. In this example, the user has already created a Saved Search called Boston Contacts. For more information on Saved Searches, see Creating a saved search (page 3-11).

1. Click **Find | Person**.
2. Select a saved search from **Saved Search**. A list of people matching the saved search criteria is displayed. A new set of action buttons is displayed.
3. Click **New Email**on the right-hand side of the screen. The **Send Mass Email** page is displayed. For information about the fields on this page, see Sending emails to groups (page 17-13).

> **New | New Email** on the top right-hand side of the page merges a single contact's details with an email. The **New Email** action button on the right-hand side of the screen sends an email to each contact in the current list.

4. Complete the information for the email blast, and click **Send Email**. The emails are sent and a link to the communication record is stored against each person on the list. The email can also be retrieved from the communication record on the contact.

Export to file

This example shows you how to export a list of companies to a file. In this example, you export a list of companies where you're the Account Manager, based on a saved search. For more information on saved searches, see Creating a saved search (page 3-11).

1. Click **Find | Company**.

2. Retrieve the **Saved Search** list by clicking it from the drop-down list at the top right-hand side of the **Find** page. A list of companies matching the saved search criteria is displayed. A new set of action buttons is also displayed the right-hand side of the page.
3. Click **Export To File**. The **Export File Options** page is displayed.
4. Choose the output format. Select from **CSV**, **Excel CSV** or **Text**. The default is CSV.
5. Click **Save**. The output is displayed in spreadsheet format in a new browser window. From the new window, you can review the information and save by clicking **File | Save As**. You can also access the exported file from the **My CRM | Shared Documents** tab.

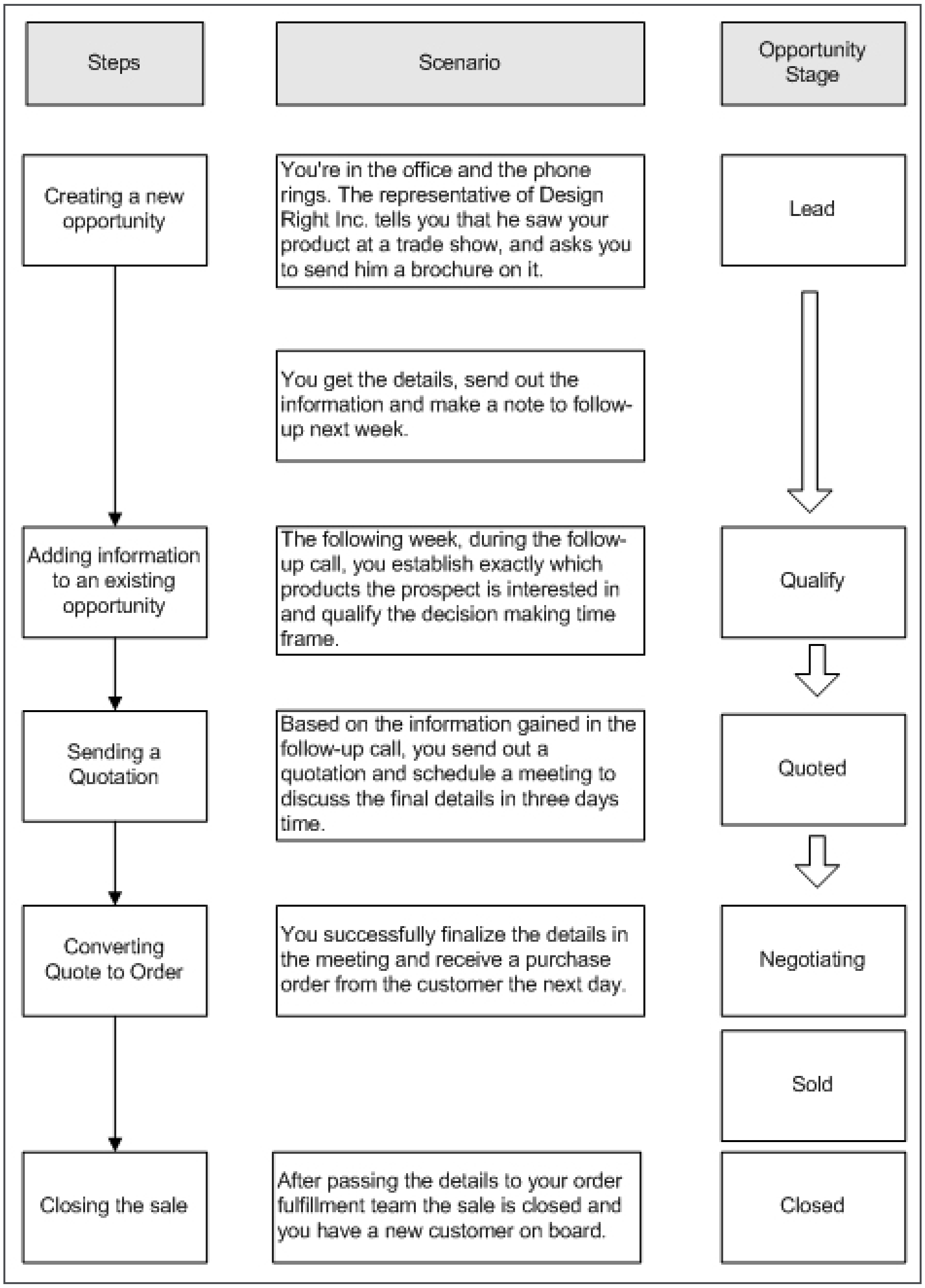
Chapter 13: Sales opportunities

- 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
- Sending a quote
- Turning a quote into an order
- Printing 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
- Finding a quote
- Finding an order

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.

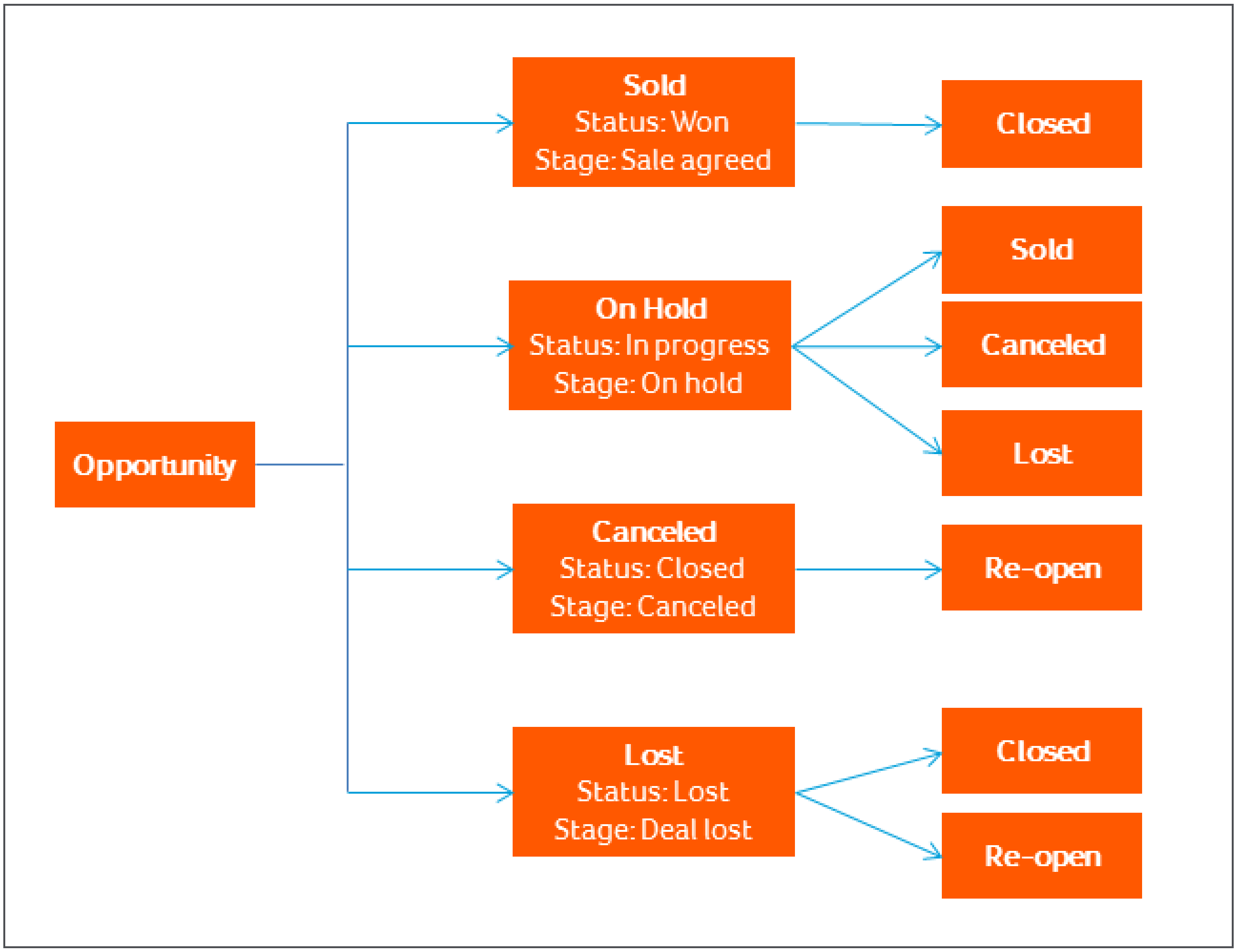
Closing a sale: Scenario



Steps	Scenario	Opportunity Stage
Creating a new opportunity	You're in the office and the phone rings. The representative of Design Right Inc. tells you that he saw your product at a trade show, and asks you to send him a brochure on it.	Lead
	You get the details, send out the information and make a note to follow-up next week.	
Adding information to an existing opportunity	The following week, during the follow-up call, you establish exactly which products the prospect is interested in and qualify the decision making time frame.	Qualify
Sending a Quotation	Based on the information gained in the follow-up call, you send out a quotation and schedule a meeting to discuss the final details in three days time.	Quoted
Converting Quote to Order	You successfully finalize the details in the meeting and receive a purchase order from the customer the next day.	Negotiating
		Sold
Closing the sale	After passing the details to your order fulfillment team the sale is closed and you have a new customer on board.	Closed

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.


Opportunity
Sold
Status: Won
Stage: Sale agreed
Closed
On Hold
Status: In progress
Stage: On hold
Sold
Canceled
Lost
Canceled
Status: Closed
Stage: Canceled
Re-open
Lost
Status: Lost
Stage: Deal lost
Closed
Re-open

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.
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 (page 4-6).
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.

Field	**Description**
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.
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.

Field	**Description**
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
❌	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 and click **Save**.

> 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.

4. Click **Next**, and then click **New line item**.The **New Line Item** panel is displayed.
5. Complete the fields on the New Line Item panel.
6. Click **Save & New** to add the next line item, or **Save** to add the line item and quit the New Line Item panel.

> 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 (page 17-1).

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.

Field	**Description**
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.

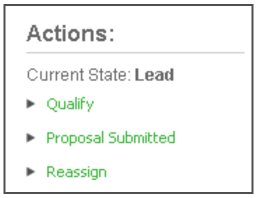
New line items panel fields

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.

Field	Description
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.



Workflow buttons

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

> 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 Sending a quote and Printing an order.

You can create a quick quote or order in the context of an opportunity or a company.

1. Click **New | New Quote** or **New | New Order**.
2. Alternatively, 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 or the New Order screen. 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, choose the relevant campaign activity from **Wave Activity**.
5. Click **Send Quote** or **Send Order**.

Sending a quote

1. Open a quote from the **Quotes** tab.
2. Click **Merge to Word** or **Merge to PDF**. A list of sales related documents is displayed in the Shared Templates list.

   > If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

3. Click the quote template you want to work with.
4. From the **Edit and Merge Document** page you can:
   - Modify the document for this mail merge. Add custom text, insert more Sage CRM merge fields, and apply custom formatting.
   - **Preview Merge**. You may need to disable any active pop-up blockers to view.

  - **Save Template**. Update the template with the changes made. Available to users with Info Manager or Administration rights only. For information on how to customize tables showing line items, please refer to the *System Administrator Guide*.

5. Click **Merge and Continue**.
6. From the **Complete Merge Process** page you can:
   - Deselect or select the **Create Communication** checkbox. Select the checkbox to create a completed Communication record with a link to the merged document. The merged document also becomes available from the **Documents** tab.
   - **View merged document**. You may need to disable any active pop-up blockers to view.
   - **Edit merged document**. This opens a new browser window where you can edit the merged document. This option is only available in Internet Explorer, when the Active X plug-in is used. Make your changes to the document, save and close. Then click **Save** on the Complete Merge Process page.

   > The ability to use the Active X plug-in is controlled by the System Administrator from **Administration | Email and Documents | Documents and Reports Configuration**.

7. Click **Continue**. If the Create Communication checkbox is selected, the **Save Merged Document As A Communication** page is displayed.
8. Add a **Subject** for the communication, and update any other fields you need to.
9. Click **Save**. A communication record with a link to the quote is created and the quote is saved in the **Documents** tab.
10. Progress the opportunity to the next stage in the sales cycle by clicking, for example, the **Proposal Submitted** workflow bullet on the Opportunity Summary page. Note that the sample workflow may vary slightly from your customized workflow.
11. Complete the required information, and add a tracking note. All changes made so far 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. The fields are displayed in the table below.

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.

Field	**Description**
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.
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.

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. Please refer to Groups (page 17-1) for more information.

Printing an order

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

1. Click **Merge to Word** or **Merge to PDF** from the Orders tab. A list of shared templates is displayed.

   > If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

2. Click the order template you want to work with. The order is displayed onscreen, and it can be edited.
3. From the Edit and Merge Document page you can:
   - Modify the document for this mail merge. Add custom text, insert more Sage CRM merge fields, and apply custom formatting.
   - **Preview Merge**. Opens a new browser window. **Note**: You may need to disable any active pop-up blockers to view.
   - **Save Template**. Updates the template with the changes made. Available to users with Info Manager or Administration rights only. For information on how to customize tables showing line items, please refer to the *System Administrator Guide*.
4. Click **Merge and Continue**.
5. From the Complete Merge Process page you can:
   - Deselect or select **Create Communication**. Select the checkbox to create a completed Communication record with a link to the merged document. This also makes the merged document available from the Documents tab.
   - **View merged document**. This opens a new browser window. You may need to disable any active pop-up blockers to view.
   - **Edit merged document**. This opens a new browser window where you can edit the merged document. This option is only available in IE and when the Active X plug-in is being used. Make your changes to the document, save and close. Then click **Save** on the Complete Merge Process page.

     > The ability to use the Active X plug-in is controlled by the System Administrator from **Administration | Email and Documents | Documents and Reports Configuration**.

6. Click **Continue**. If the Create Communication checkbox is selected, the Save Merged Document As A Communication page is displayed.
7. Add a subject for the communication, and update any other fields you need to.
8. Click **Save**. A Communication record with a link to the order is created, and the order is saved in the Documents tab.

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.
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 workflow functionality automates the progression of opportunities to follow predefined business processes.

If your system doesn't have Opportunity Workflow enabled, you will notice that the Opportunity workflow bullets on the right-hand side of the Summary page are replaced by a **Progress** button. This button allows you to manually change details of the opportunity via the Progress Opportunity page. Changes are still recorded in the Tracking tab.

Progress button

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.
    - 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.
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 using **Find** or accessing your Recent List.

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.
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**.
   The New Quote or Order page is displayed.
2. Add the information on the New Quote or Order page. For more information, see Adding products to an opportunity (page 13-7).
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.

Finding a quote

1. Click **Find | Quote**.
2. Type or select the search criteria on the Find screen.
3. Click **Find**. A list of all quotes matching your search criteria is displayed.
4. Click the Quote Reference or Description. The Quote Details page is displayed, which gives you an overview of the quote.

Finding an order

1. Click **Find | Order**.
2. Type or select the search criteria on the Find screen.
3. Click **Find**. A list of all orders matching your search criteria is displayed.

4. Click the Order Reference, Description or Status. The Order Details page is displayed, which gives you an overview of the order.

Chapter 14: 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.
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.

Term	Description
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
Quarter	A three month period.
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.

Term	Description
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 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. Select the **Quarter** and **Year** of the forecast, for example, this year Quarter 4. Your own forecast is displayed within the **My Pipeline** panel, and your team’s forecasts are displayed in the **My Direct Reports** panel.
4. 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.

Note: When a manager clicks on a subordinate's opportunities, the summary screen for that Opportunity is displayed.

5. Click **Save** to update the manager’s assessment.
6. 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.
7. Click the magnifying glass icons next to the months to update the overall forecast.
8. Make any final manual changes required to the forecast figures on the top panel.
9. 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.

Chapter 15: Leads

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

What is a lead?

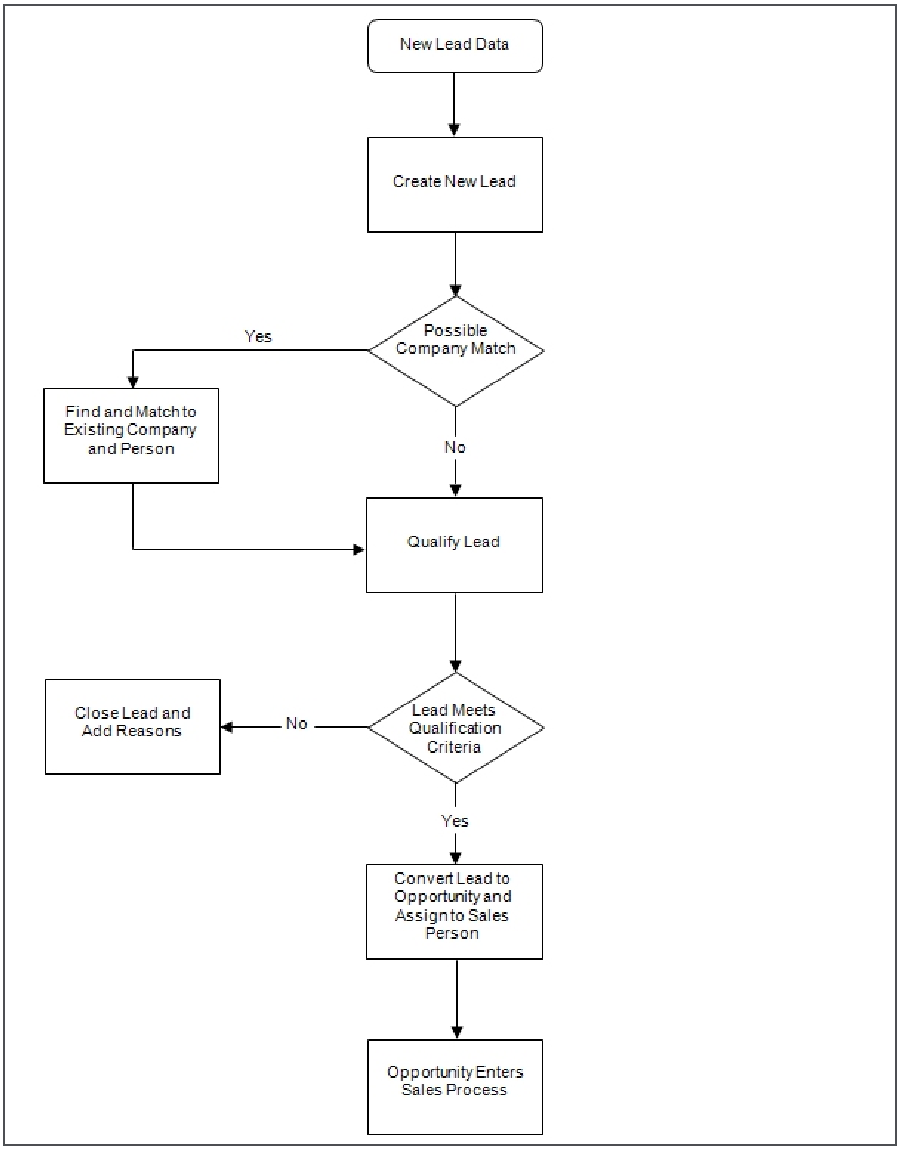
A lead represents unqualified information that you have received from, for example, your corporate Web site, trade shows, and purchased mailing lists.

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.

Lead Qualification: Scenario


New Lead Data
Create New Lead
Possible Company Match
Yes
Find and Match to Existing Company and Person
No
Qualify Lead
Close Lead and Add Reasons
No
Lead Meets Qualification Criteria
Yes
Convert Lead to Opportunity and Assign to Sales Person
Opportunity Enters Sales Process

Creating a new lead

1. Click **New | New Lead**.
2. The Lead Duplicate find screen is displayed. 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.
3. 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**.

4. If no duplicate lead record is found, the New Lead page is displayed.
5. Complete the lead fields and click **Save**. The Lead Summary page is displayed.
6. 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.

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 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).
Assigned To	User responsible for the lead.
Team	Team the lead is assigned to. For example, telesales.
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.

Field	**Description**
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

Searching for an existing lead

1. Click **Find | Lead**.
2. Enter the name of the person, or combine any other available search criteria available.
3. Click **Find**.
4. Click the Lead description. You can view details of the Lead and view related communications and notes in the context of the Lead.

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, please see Converting a lead to an opportunity (page 15-6).

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. From the **Lead Summary** page, click **Convert To Opportunity**.
3. If you have not yet matched the lead to a company or person, a warning dialog box is displayed.
4. 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.
5. Click **Save**.
6. Click **Select Company**. The lead is matched to the new company and person that you have added to the system.
7. Click **Convert To Opportunity**. For more information on the Opportunity fields, please see Creating a new opportunity (page 13-3).
8. Complete any further known details on the **Record New Opportunity** page.
9. 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.

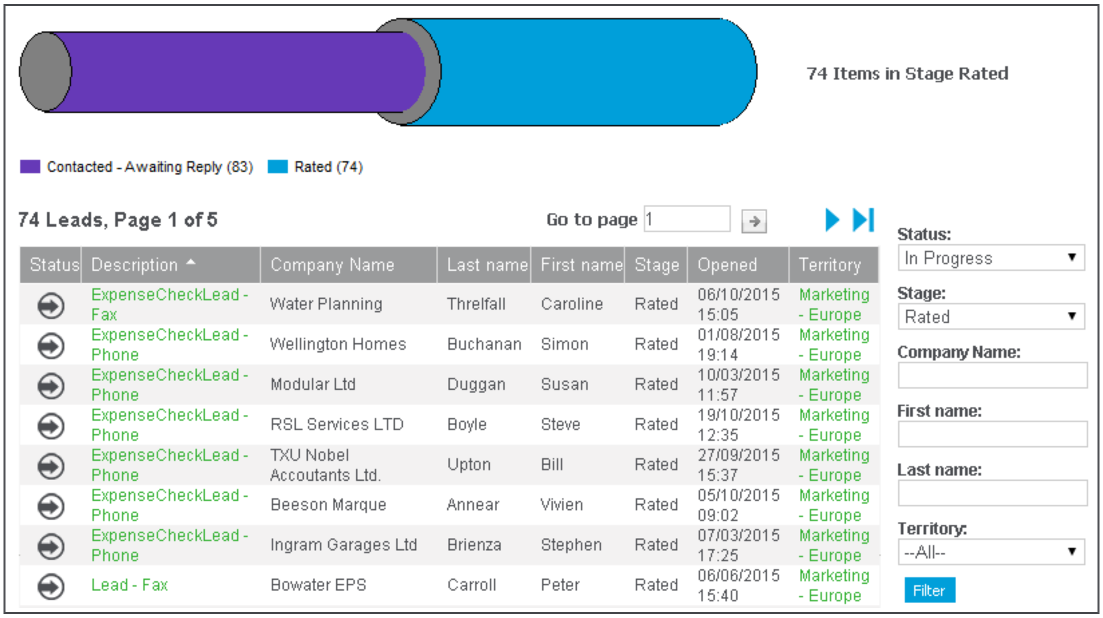
Manually progressing leads

The workflow functionality automates the progression of leads to follow predefined business processes. Your System Administrator can determine whether your system uses workflow or not from **<My Profile> | Administration | Advanced Customization | Workflow & Escalation Configuration**.

If your system does not use **Lead Workflow**, the Lead workflow actions on your leads' Summary page are replaced by a **Progress** button. This button allows you to manually change details of the lead via the **Progress Lead** page. Changes are still 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.
  - 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**.



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Status	Description	Company Name	Last name	First name	Stage	Opened	Territory
	ExpenseCheckLead - Fax	Water Planning	Threlfall	Caroline	Rated	06/10/2015 15:05	Marketing - Europe
	ExpenseCheckLead - Phone	Wellington Homes	Buchanan	Simon	Rated	01/08/2015 19:14	Marketing - Europe
	ExpenseCheckLead - Phone	Modular Ltd	Duggan	Susan	Rated	10/03/2015 11:57	Marketing - Europe
	ExpenseCheckLead - Phone	RSL Services LTD	Boyle	Steve	Rated	19/10/2015 12:35	Marketing - Europe
	ExpenseCheckLead - Phone	TXU Nobel Accoutants Ltd.	Upton	Bill	Rated	27/09/2015 15:37	Marketing - Europe
	ExpenseCheckLead - Phone	Beeson Marque	Annear	Vivien	Rated	05/10/2015 09:02	Marketing - Europe
	ExpenseCheckLead - Phone	Ingram Garages Ltd	Brienza	Stephen	Rated	07/03/2015 17:25	Marketing - Europe
	Lead - Fax	Bowater EPS	Carroll	Peter	Rated	06/06/2015 15:40	Marketing - Europe

Status: In Progress
Stage: Rated
Company Name:
First name:
Last name:
Territory: --All--

Drilling down on the Leads pipeline

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.

Field	Description
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 in **My CRM**.

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. From the **Lead Summary** page, click **Edit**.
3. Click **Delete**, then **Confirm Delete**. The record is deleted from the system.

Chapter 16: Outbound call handling

- Introduction to outbound call handling
- Outbound call handling buttons
- Outbound call handling tabs
- Accessing outbound calls
- Working with outbound calls

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.

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.
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. Go to **<My Profile> | Preferences** and make sure that the **Show Outbound Calls In My CRM** option is set to **Yes**. Click the **Outbound Call Lists** tab . All outbound call lists that you have been assigned to work on are displayed.
2. 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. Please refer to Outbound call fields (page 18-12) for more information. 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.

Chapter 17: Groups

- Introduction to groups
- Technical overview of groups
- Groups tab
- Creating a group
- Creating a group from the Groups tab
- Group action buttons
- Creating a group from the Wave Activities tab
- Creating a group based on a primary entity search
- Adding a primary entity record to a static group
- Adding multiple records to a group
- Adding multiple records to a group using Search/Saved Search
- Adding multiple records to a group using Advanced Find
- Adding the records of a group to another group
- Refreshing a group
- Editing a group
- Performing a mass update on a group
- Updating group territories
- How group information is stored
- Key attribute data generated by groups
- Adding group list information to a tab
- Exporting group information
- Viewing an exported group
- Sending mass emails
- Sending emails to groups
- Sending E-marketing emails to groups

Introduction to groups

The Groups feature allows you to create, edit, and save lists of people, companies, leads, cases, opportunities, quotes and orders based on defined filter criteria.

The filter criteria can be simple or complex. For example, "All IT managers in Dublin", or "All the 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".

You can:

- Generate groups based on views which offer the same flexibility and power as Sage CRM reports. For more information, see **View Customization** in the *System Administrator Guide*.
- Generate groups based on the Key Attributes functionality. For more information, see **Key Attribute Profiling** in the *System Administrator Help*.
- Define how to sort the contents of a group when it's displayed.
- Navigate groups using the **forward** and **back** buttons.

> You can add a company with no people to a group. However, such a group cannot appear in an Outbound Call list.

Technical overview of groups

Group Building. Groups are based on SQL views generated by queries. These retrieve records based on specified entity IDs. You can specify which view a group is based on.
A System Administrator can add and/or edit views in **<My Profile> | Administration | Customization | <Entity> | Views**. To filter a group result, use any of the fields available from a view, or use key attribute data.

Group Storage. Groups can be static or dynamic:

- A static group stores both the query that generated the group and the list of returned records. When you open a static group, it returns the list of records that were last added to the group. The contents of these groups must be manually refreshed.
- A dynamic group stores only the query that generates the group contents. Each time you open a dynamic group, the query is run and the group contents are refreshed.

Groups tab

To view and manage groups, click the **My CRM | Groups**tab. The **Groups** tab is available if your System Administrator has given you the rights from **<My Profile> | Administration | Users**.

Creating a group

You can create a group in several ways.

- From the **Groups** tab.
- From the **Wave Activity** tab.
- Based on a primary entity search.
- When performing a data upload. For more information, see **Running a data upload** in the *System Administrator Help*.
- From any search list results.

Creating a group from the Groups tab

1. Click **My CRM**, and click the **Groups** tab.
2. Click **New Group** and enter a name and description for the group.
3. Select a type of group from **Type**. You can create a static or dynamic group.

4. Select the entity for your group from **Entity**. All records within a group must be based on the same primary entity. When you select an entity, **Source View** is displayed containing views that return one row per ID field.
5. Select the group's source view and click **Continue**.
6. Select the columns to include in the group contents, search criteria, and sort order.
7. Select **Advanced Find**to create an advanced find query to generate the group. Please refer to Using Advanced Find (page 3-5) for more information. You can also add key attribute data to the selection fields of your group definition.
8. Click **Continue**. If you've added search criteria, the **New Group, Stage 3 of 4** page is displayed.
9. Specify your search criteria and click **Continue**.
10. If you're creating a static group, you can **Include All** or **Exclude All** records. The default is **Include All**.
11. Click **Save**.

> If you're creating a static group, click **Save empty static group** to save the query that generated the group, but not the list of records returned by the query. Use this to build a group of individually selected records. For more information, see Adding a primary entity record to a static group (page 17-5).

Group action buttons

This table describes the Group action buttons.

Button	**Description**
New Task	Creates a task against each recipient on the group.
New Email	Sends an email to each recipient on the group.
Merge to Word or Merge to PDF	Merges a standard template with the address and contact details of the recipients in the group. If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.
Export To File	Exports the group as a text or a CSV file. Exported groups can be viewed from **My CRM | Shared Documents**.

Button	**Description**
New E-marketing Email	Lets you set up an E-marketing email wave activity to send an E-marketing email to each recipient on the group. Choose a **Campaign** and **Wave** for the E-marketing email wave activity first. E-Marketing must be enabled. Please refer to Setting up an E-marketing campaign (page 18-18) and Creating an E-marketing email (page 18-19) for more information.
Mass Update	Allows simultaneous updates to all records in the group. Displayed to System Administrators only if **Allow Mass Update And Update Territory** is set to **Yes** in **<My Profile> | Administration | System | System Behavior**. For more information, see Performing a mass update on a group (page 17-7).
Update Territory	Allows an administrator to update territories for a group. Displayed to System Administrators only if **Allow Mass Update And Update Territory** is set to **Yes** in **<My Profile> | Administration | System | System Behavior**. For more information, see Updating group territories (page 17-8).
Include All	Toggles all members of the group to be included. Available for static groups only.
Exclude All	Toggles all members of the group to be excluded. 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.
Exclude Previous Recipients	If the group has already been used for an action, excludes the people, companies, or leads who were the targets of that action. Available for static groups only.
SQL	Displays a new window containing the current SQL used to generate the group. Displayed to System Administrators only. If you have SQL experience, this statement can be customized.

When you click an action, the **Parent Category Selection** panel is displayed. It contains an entry that corresponds to the action you selected.

When you select the Parent Category and execute the action, a new category is automatically created as a child category in Key Attribute Data. The child record stores a link to every recipient for this action. You can use this child category as a selection criteria for a follow-up action. For more information, see Key attribute data generated by groups (page 17-10).

Creating a group from the Wave Activities tab

User Requirement: System Administrator or Information Manager rights

Groups created from the **Wave Activity** tab in the **Marketing** area help you 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. For more information, see Creating a new group based on responses to follow-up calls (page 18-11).

Creating a group based on a primary entity search

If you've access to groups, you can create a group containing the results of a search on a primary entity (Company, Person, Case, Opportunity, Lead, Quote, or Order). For example, you can create a group based on the results of a search for all companies based in Chicago.

You can also create a group based on the results of an Advanced Find search . For more information, see Using Advanced Find (page 3-5).

1. Click **Find | <Entity>**.
2. Enter your search criteria and click **Find**. A list of matching records is returned.
3. Click **Create New Group**.
4. Enter a name and description for the new group.
5. Select who can access the group from **Available To**.If you're an Info Manager with Groups access, you can make groups available to other Info Managers, or keep them for your own private use. If you're a System Administrator, you can make a group available to all users.
6. Select dynamic or static from **Type**.
7. Click **Save**.

Adding a primary entity record to a static group

You can add a record to a static group, directly from the record's Summary screen.This is possible for Person, Company, Case, Opportunity, and Lead.

The following example explains how to add a Company record to a group.

1. Click **Find | Company** and locate the company you want to add to the static group.
2. Open the **Company Summary** page.
3. Click**Add This Record To A Group**.
4. Select the group from the **Select Group**drop-down list. For this example you can choose from static groups based on the Company entity, which are available to all users.
5. Click **Save**.

Adding multiple records to a group

If you have group access rights, you can:

- Add multiple records of the same entity type to any static group.
- Add records by searching on a standard entity search screen, or using an advanced search.
- Add all of the records of one group to another group, provided both groups are based on the same entity.

When adding multiple records to a group, you can receive an onscreen message if you attempt to add a record that is already in the destination group.

> You cannot add records to group if you do not have the correct security rights. Instead, you receive a notification explaining that the records are not available to you.

Adding multiple records to a group using Find/Saved Search

1. Click **My CRM | Groups**.
2. Click the link for the group you want to add records to. The **Group Details** page is displayed.
3. Click **Add Records To The Group**. The Add To Group dialog box is displayed.
4. **Add Records Via Find / Saved Search** is selected by default. Click **Continue**.
5. To search for the records you want to add to the group, use the filter options or run a saved search.
6. Click **Add to group** A notification is displayed to tell you the number of records you have added to the group.
7. Click **Continue** to go back to the **Group Details** page.

Adding multiple records to a group using Advanced Find

1. Click **My CRM | Groups**.
2. Click the group you want to add records to. The **Group Details** screen is displayed.
3. Click **Add Records To The Group**. The Add To Group dialog box is displayed.
4. Select **Add Records Via Advanced Find** and click **Continue**. The Advanced Find page is displayed.
5. Search for the records you want to add to the group using the advanced find options or by running a saved search.
6. Click **Add To Group**. A notification is displayed to tell you how many records have been added to the group.
7. Click **Continue** to go to the **Group Details** page.

Adding the records of a group to another group

1. Click **My CRM |Groups**.
2. Open the group you want to add records to. The **Group Details** screen is displayed.
3. Click **Add Records To The Group**. The Add To Group dialog box is displayed.

4. Select **Add Another Groups Records** and click **Continue**.
5. Select the group whose records you want to add from the **Groups** drop-down list.
6. Click **Save**. A notification tells the number of records added to the group.

> Duplicate records are not be added.

7. **Close** the Groups dialog box.

Refreshing a group

Dynamic groups are refreshed automatically. New records that match the group search criteria are automatically added to these groups.

Static groups aren't refreshed automatically. You must click **Refresh** to add new matching records to these groups.

The following example explains how to refresh a static group of people in order to perform a task on the group. First, you'll create a group and send them a mail shot. Then, you'll update your group with three extra people and send them the original mail shot.

1. Create a new group of people based on a criterion, such as *City* = *Dublin*.
2. Open the group and 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.

3. Add three new people to the system with the criterion *City=Dublin*.
4. Open the group, and note the number of people in it.
5. Click **Refresh**. The number of people is incremented by three.
6. Click **Exclude Previous Recipients**.
7. Click **Merge to Word** or **Merge to PDF**. The mail shot is sent to the three new contacts only.

Editing a group

You can edit certain fields in both static and dynamic groups.

1. Click the **Groups** tab.
2. Open the group that you want to edit. The **Group Details** page is displayed.
3. Click **Change**. **Group Stage 1 of 4** is displayed.
4. Click **Continue** to move through the editable group attributes.
5. When you reach the **Group Stage 4 of 4** page, click **Save**.

> Group records are locked for editing when selected. This means only one user can make changes to a group at any one time.

Performing a mass update on a group

User Requirement: System Administrator or Information Manager rights

The mass update function is enabled from **<My Profile> | Administration | System | System Behavior**. Please refer to **System Settings** in the *System Administrator Guide* for more information.

The mass update function allows you to simultaneously update the same fields in selected records within a group. For example, if four people in a group of contacts have moved to a new region, use the mass update function to update the **Region** field for all four records in one go.

> The System Administrator should ensure they have a full backup of the database before performing a mass update.

1. Go to **My CRM | Groups**.
2. Open the group that you want to update.
3. Select the **Exclude** check boxes for any records that you don't want to update.
4. Click **Mass Update**. The **Fields** page is displayed. This page displays all the fields common to the records you have selected.
5. Select the fields you want to update. For this example, select the **Region** field.
6. Click **Continue**. The **Region** drop-down list is displayed.
7. Select a new region for the records; for example **US East**.
8. Click **Save**. A notification tells you the number of records affected by the update.
9. Click **OK**. The **Summary of Updated Records** page is displayed.
10. Click **Continue**. The selected records have now been updated.

Updating group territories

User Requirement: System Administrator rights

To enable this feature, go to **<My Profile> | Administration | System | System Behavior**. For more information, see **System Settings** in the *System Administrator Guide*.

The **Update Territories** option allows you to simultaneously update the territory field for selected records within a group.

For example, if you have a group of contacts assigned to various US territories, you can update all the records in the group so they belong to the US Canada territory instead.

> The System Administrator should ensure they have a full backup of the database before performing a mass update. Make sure that all users are logged out of the system before performing a territory update. Please refer to the *System Administrator Guide* for more details.

1. Click **My CRM | Groups** tab.
2. Open the group that you want to update.
3. Exclude any records that you do not want to update.
4. Click **Update Territory**.

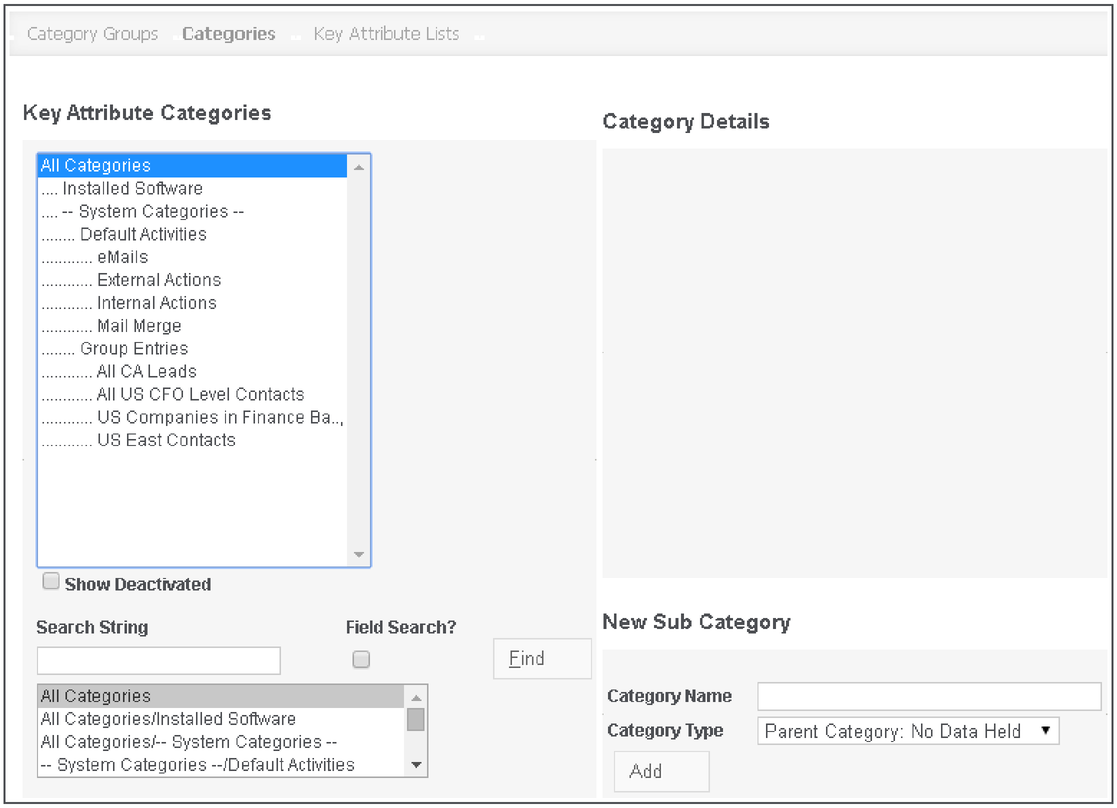
5. Select the new group territory from the **Territory Name** drop-down list. For this example, select US Canada.
6. Click **Save**. The **Summary Of Potential Update Records** page is displayed.
7. Click **Go**. The **Summary of Updated Records** page is displayed.
8. Click **Continue** . The selected records have now been updated.

How group information is stored

User Requirement: Information Manager rights

Information generated by static groups is stored in key attribute data. This occurs in two ways:

- When you create a static group and save it, the group and all its records are saved with a piece of key attribute data, which identifies the group and all its members. The saved group can be viewed from **<My Profile> | Administration | Advanced Customization | Key Attributes | Categories** under the **Group Entries** category. The key attribute field, which is stored against the group member is set to either **Include** or **Exclude**.


Category Groups
Categories
Key Attribute Lists
Key Attribute Categories
All Categories
.... Installed Software
.... -- System Categories --
.... Default Activities
.... eMails
.... External Actions
.... Internal Actions
.... Mail Merge
.... Group Entries
.... All CA Leads
.... All US CFO Level Contacts
.... US Companies in Finance Ba..,
.... US East Contacts
☐ Show Deactivated
Search String
Field Search?
☐
Find
All Categories
All Categories/Installed Software
All Categories/-- System Categories --
-- System Categories --/Default Activities
Category Details
New Sub Category
Category Name
Category Type
Parent Category: No Data Held
Add

Key Attribute Categories list with Group Entries

- When you perform an action against records in a static or a dynamic group, the action, and all the records affected by the action, are saved with a piece of key attribute data. The actions can be viewed from **<My Profile> | Administration | Advanced Customization | Key Attributes | Categories** under the **Default Activities** category. The key attribute data field, which is stored against the group member, is set to the date that the action was carried out.

Key attribute data generated by groups

User Requirement: System Administrator rights, or Information Manager with Key Attributes rights

This example illustrates how to work with key attribute data generated by static groups.

1. Create a new static group of people where the Title Code = IT Manager.
2. Click **Continue**, and select the columns you want to display in the group.
3. Click **Continue** and set the search criteria to IT Manager. The New Group Stage 3 of 4 page is displayed.
4. Click **Continue**. The New Group Stage 4 of 4 page is displayed.
5. Click **Save**. The page is displayed with a Group Saved bar at the top.
6. Click **<My Profile> | Administration | Advanced Customization | Key Attributes | Categories**. The Key Attribute Categories list is displayed showing the saved group you created as a child category of the Group Entries category.
7. Click **My CRM | Groups**.
8. Click the group you created.
9. Click **New Task** to schedule a phone call to each person in the group. The New Task page is displayed.
10. Complete the communication details, and click **Internal Actions** on the Parent Category panel at the end of the page. The default Parent Category is set up from **<My Profile> | Administration | Key Attributes | Category Groups | Activity Category Groups**.
11. Click **Save**. A communication is scheduled for each person in the group.
12. Click **<My Profile> | Administration | Advanced Customization | Key Attributes | Categories**. The Key Attribute Categories list is displayed showing the action against the group as a child category of the Default Activities | Internal Actions category.

   Because the saved group and the actioned group are stored in this way, you can now report on these entries and create further groups based on them for future or follow-up actions or reports for analysis of past groups.

Adding group list information to a tab

User Requirement: System Administrator rights, or Information Manager with Key Attributes rights

You can review and change static group data from the record level that it is stored against. For example, if you want to view all actions (mail merges, email blasts, and so on) carried out against a particular person, or see what Groups they are members of, you can display this key attribute profiling data on a tab within the person context. For more information, see Key Attribute Profiling in the *System Administrator Guide*.

1. Click**<My Profile> | Administration | Advanced Customization | Key Attributes | Category Groups**, and make sure that **General Category Groups** is selected in the list.
2. Click **New**.
3. Enter a name and description for the Category Group, for example, **Group Information**.
4. Select the categories, for example, **Default Activities** and **Group Entries**, that you want to be displayed within this category group from the Key Attribute Categories list and move them

over to the Categories Within Group list. These are at the upper level of the Key Attribute Categories list. You could start much lower down the child categories to display more specific information relating to a particular set of actions or groups.

5. Click **Save** to display the new category group.
6. To display the information on a tab within the context of a person, click **<My Profile> | Administration | Customization | Person | Tabs**.
7. Click the **Person** tab group. The Customize Tabs page is displayed.
8. Add a new tab, with the Action set to Key Attributes, and the Key Attribute Category Group set to the category group you have just created.
9. Click **Add**, then click **Save**.
10. Search for a Person, who is already on one of the groups you have created, and where you have carried out an action against that group.
11. Click the Person record.
12. Click the new tab you have created. The key attribute data representing the group membership and actions carried out is displayed on the tab. This information can be manually edited to change, for example, a particular person from being Included in a group to being Excluded.

Exporting group information

You can export a group to a CSV or text file. If a group is exported to a CSV file, it is saved in the **My CRM | Shared Documents** tab.

When exporting a group to a file, the type of communication record created depends on the entity the group is based on:

- When a group is based on the Person or Company entities the communication created is linked to each contact in the group and a record of the group export appears on the Communications tab of every person or company in the group.
- When a group is based on the Opportunity or Case entities a single communication containing a link to all of the relevant opportunities or cases is recorded in the calendar of the user who has performed the export.

To export a group:

1. Click **My CRM | Groups**.
2. Click the group you want to export. The **Group Details** page is displayed.
3. Click **Export To File**. The Export Group page is displayed.
4. Select either the **Spreadsheet (CSV)** or **Text** option.
5. Click **Save**. When the list is exported, you can view it or save it to a location of your choice.

> The **Create entry in shared documents** check box is selected by default if the group you're exporting is not private. If the group is private, the check box is deselected by default. Selecting it makes the shared document available to all users.

Viewing an exported group

When you export a CSV file from a group, it is added to the document library, and can be viewed from the Shared Documents tab.

1. Click **My CRM | Shared Documents**. The list of your shared documents is displayed.
2. Click the exported group that you want to view.
3. Click **View Attachment**. The CSV file is opened in a new browser window.

Sending mass emails

User Requirement: Information Manager rights

Mass emails can be in text or HTML format, and they can contain file attachments and inline images. To upload an inline image, you must have the **Send Email As HTML** field set to **Yes** in **<My Profile> | Administration | Email And Documents | Email Configuration**.

Note that if you're using a free 30-day trial, your mass emails are not sent. However, they are saved as communications.

Opt out of E-marketing Communications Flag

There is a check box flag on the Company, Person, and Lead Summary pages, which is automatically set by Swiftpage if E-marketing is being used. E-marketing emails never go out to the associated Company, Person or Lead email addresses where this flag is set, even if the user has manually unchecked the option in Sage CRM.

If you're using Sage CRM's own mass email feature, 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 withthe standard Mass email feature.

Configuring Sage CRM for Mass emails

Once the embedded email editor is configured, you can use the Mass Email functionality. However, if you want the ability to send emails in HTML format, you need to make sure the system is configured to do so. You also need to ensure that the required **From** and **Reply To** addresses have been specified.

To ensure that HTML emails can be sent to groups:

1. Click **Administration | Email And Documents | Email Configuration**. The Email/SMS settings page is displayed.
2. Check that the **Send Email As HTML** field is set to **Yes**. If you don’t have a requirement to send HTML emails, the **Internal SMTP** option can be chosen.

To ensure that From and Reply To addresses have been specified:

1. Open **<My Profile> | Administration | Email And Documents | Email Aliases** and click **New**. A list of email addresses that emails can be sent from is displayed. If the entry for the email address you want to send mass emails from is not listed, you need to set up an entry for it.
2. Click the mailbox you want to use to send mass emails from, and click **Change**. In this example, the Marketing mailbox is being used.

3. Ensure that the **Email Address** and **Display Name** fields are completed and that **From** and **Reply To** addresses are enabled and specified.
4. Click **Save** .

Sending emails to groups

> To send mass emails to a Group, the Group must be linked to a Person, Company or Lead.

1. Click **My CRM | Groups** and click the Group you want to email. The Group Details page is displayed.
2. Click **New Email**. The Send Mass Email page is displayed.
3. To ensure the email isn't sent to members of another Group, select the other Group from **Dedupe Against Existing Group**.
4. To base the email on an existing template, click **Template**. Sage CRM templates usually contain standard content and field codes. Further formatting layouts are available from the **Layouts** toolbar button.
5. Select a **From** address. Your email address is the default value. Other options depend on what your System Administrator has configured and your permissions.
6. Enter a subject and the email content.
    - You can type a message in standard text, and use the text editor buttons to format it.
    - To include merge fields in the email, select the fields from **Choose Field to insert into the Email**. For example, you can include the recipient’s first name or title in the email.
    - To include HTML content in the email, click **Source**. Copy and paste HTML into the 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. The source of the image files must be specified in the HTML source code as paths on the Internet, for example, <img src = "http://www.*domain*.com/products/image.gif">. If you don't have experience writing HTML source code, ask whoever writes the HTML source to ensure the images are referenced in this way before you use the HTML in your mass emails.
    - You can add a .GIF, .JPEG, or .JPG file as an inline image. An inline image is an individual image that's included in the email body. Inline images are displayed in the email body, and are referenced from the email server in the HTML source. To upload an inline image, click **Choose File**, navigate to the image file, select the image file, and click **Upload inline image**. To display the image in the body of the email, you must reference the image in the HTML. Click **Source** and update the HTML to reference the image.
    - You can attach global documents and local files. To attach a global document, the Search Select icons to locate the file, select the file, and click **Upload Attachment**. Please refer to Search Select Advanced (page 2-8) for details on using the Search Select buttons. To attach a local file, click **Choose File**, navigate to the file, and click **Upload Attachment**.
7. When you've added the email content, you can specify additional rules for saving the communication in the database. The option to specify additional rules is not available if you're

using Email Management to handle outbound emails. From the **Communication Options** panel, select the team and territory in which you want the communication to be saved, and specify the status and the type of communication you want the email saved as.

8. To link the mass email to a Wave Activity, select an activity from **Wave Activity**.
9. If you select **Emails** from **Parent Category Selection**, a new category is automatically created in Key Attribute Profiling as a child category of eMails when the email is sent. The name of the category corresponds to the email subject. The child record stores a link to every recipient of the email. You can use this piece of key attribute data as a selection criteria for a follow-up action to this email.
10. To proof the spelling and layout of the email before you send it, click **Check Spelling** and **Preview**. To see how the email looks to recipients, click **Send Yourself Test**.
11. To send the email to all people or companies in the Group, click **Send Email** and then click **OK**.
12. To review the status of the job, click **Marketing | Mass Email Status**.
13. To temporarily stop the mailer, click **Stop** from the Actions column. The current mailer details remain on the status list until the job is resumed and the email has gone to everyone in the group. If you click **Stop**, the emails remain unsent with a Pending status even if they were set to a Complete status in the **Send Mass Email 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** .
14. To restart the mailer, click **Resume**. When all emails have been sent successfully, the status bar at the top of the Mass Email Status tab displays the following message: "There are no pending mass Emails". Any problems that are encountered when sending the email are included on the status list, and you can troubleshoot the problem. Emails sent to the group are saved as communications against the person and/or company that they are sent to. They are also saved against the team and territory you specified on the Communication Options panel and according to the status you selected.
15. To review a sent email, find a Person or Company to whom you sent a mass email and open the communication. You can convert the email to an Opportunity, Lead, or Case. If the email was linked to a Wave Activity, you can click **Change**and register a response to it. Note that to register a response, you must open the Email Out from the Communications list in the Person or Company context.

Sending E-marketing emails to groups

To send an E-marketing E-mail to a group:

1. Click **My CRM | Groups**, and click an existing group.
2. Click the **New E-marketing E-mail** button.
3. Select the **Campaign** and **Wave** to assign the new E-marketing activity to, and **Save**.
4. Enter the E-marketing E-mail details. The fields are described in E-marketing E-mail Fields (page 18-19).
5. Select **Save & Send**.

Chapter 18: Campaign management

Campaign Set-up and Normal Wave Activities

- What is campaign management?
- Setting up a new campaign
- Campaign, wave and wave activity fields
- Campaign wave activity action types
- Cloning a campaign
- Performing an internal mail merge
- Scheduling an internal telesales activity
- Setting up new response codes
- Creating a new group based on responses to follow-up calls
- Setting up outbound call handling
- Reporting on opportunities generated through campaigns

E-marketing

- Set up an E-marketing campaign.
- Create an E-marketing e-mail.
- Understand E-marketing e-mail fields.
- Set up a Drip marketing campaign.
- Create a Drip marketing e-mail.
- Understand Drip marketing e-mail fields.
- Create a Drip marketing call list.
- Edit E-marketing e-mail templates.
- Analyze E-marketing campaigns.
- Work with the E-marketing User Profile tab.

What is campaign management?

User Requirement: 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.

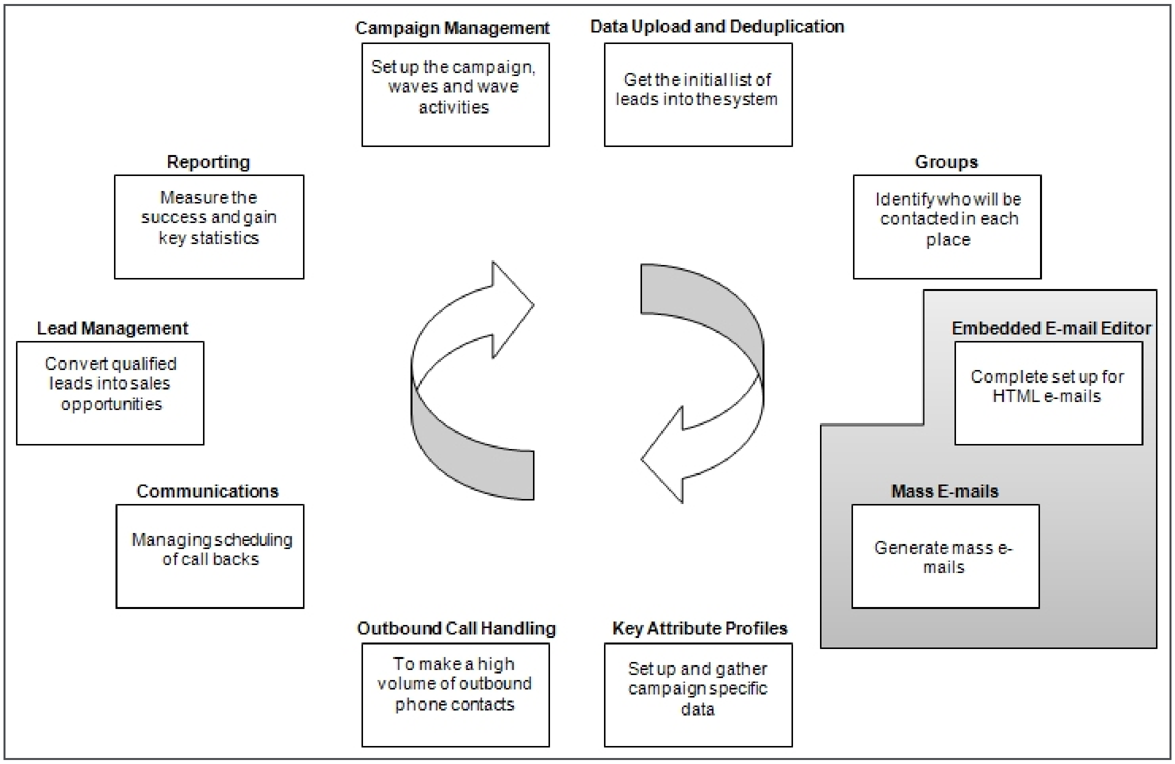
- **Waves:** Waves are a way of grouping activities within a campaign, normally in chronological order.
- **Wave activities:** Wave Activities define exactly what action is performed for the campaign. For example, Outbound Telesales Activity or Flyer Mailing Activity.

- **Sage E-marketing for Sage CRM** is an integration with Swiftpage (http://www.swiftpage.com). This 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 Scenario

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.


Campaign Management
Set up the campaign, waves and wave activities
Data Upload and Deduplication
Get the initial list of leads into the system
Groups
Identify who will be contacted in each place
Embedded E-mail Editor
Complete set up for HTML e-mails
Mass E-mails
Generate mass e-mails
Key Attribute Profiles
Set up and gather campaign specific data
Outbound Call Handling
To make a high volume of outbound phone contacts
Communications
Managing scheduling of call backs
Lead Management
Convert qualified leads into sales opportunities
Reporting
Measure the success and gain key statistics

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 SageCRM's mass email feature, 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. More information can be found on this in Sending mass emails (page 17-12).

Setting up a new campaign

User Requirement: Information Manager rights

1. Click **Marketing**.
2. Click the **Campaign List** tab.
3. Click **New Campaign**.
4. Enter the campaign details, and click **Save**.

   > 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**.

5. Click **New Wave** to set up the waves, or phases of your campaign.
6. Enter the Wave details and click **Save**.
7. Click **New Wave Activity**.
8. Enter the Wave Activity details and click **Save**. You have set up the framework of your campaign, and can begin on the first wave.

Campaign, wave and wave activity fields

User Requirement: Information Manager rights

> In most areas of **E-marketing** campaigns, the following special characters are **not** supported: **$ % ^ & ( ) { } [ ] ~ | / ? < > , :**.

The following special characters **can** be used in the email subject and personal message: **$ % & ( ) ? , :**.

These tables explain the standard fields on the Campaign, Wave, and Wave Activity pages. Please refer to E-marketing E-mail Fields (page 18-19), Drip Marketing E-mail Fields (page 18-22), and Outbound call fields (page 18-12) for more information on fields relating specifically to these Wave Activity types.

Campaign 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 (recipients) is set at the Campaign level only (not per Wave Activity). This is because subsequent wave activities or “stages” are based on filtered criteria from the original group. **Note**: The group must include an email address field and at least one recipient. For more information on creating groups please refer to Groups (page 17-1).

Field	Description
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.

This table explains the standard fields on the Wave page.

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.

This table explains the standard fields on the Wave Activity page.

Field	Description
WaveActivityName	Name of the wave activity.
Status	Status of the wave activity. For example, Pending, Active, Canceled, Finished.

Field	Description
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.The full list of action types is described Campaign wave activity action types (page 18-6).
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. Please refer to Creating a group from the Groups tab (page 17-2) for more information.
Activity Budget	Total budget for this wave activity.
Actual Cost	Actual cost of the wave activity.

Campaign wave activity action types

User Requirement: Information Manager rights

Campaign Management workflow must be turned on for you to see the workflow buttons.

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.
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.

Action	Description
Other	Does not have an associated workflow button. Can be used for, for example, a print advertising phase of the campaign.

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

User Requirement: 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, deselect **Create Communication**.
7. Complete the relevant fields in the **Details** and **Scheduling** panels on the Save Merged Document as a Communication page and click **Save**. The Wave Activity Summary page is displayed, with **Status** set to **Actions Completed**.

Scheduling an internal telesales activity

User Requirement: 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.

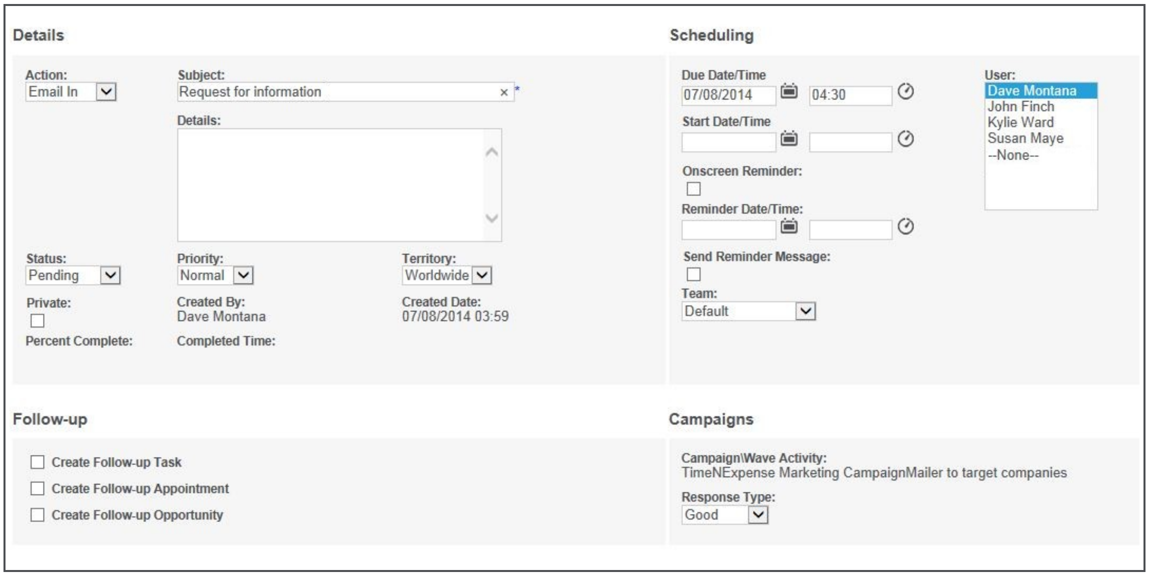
The Marketing team can now work through the follow-up calls from their respective calendars, and select the relevant response code as they complete each call.

Setting up new response codes

User Requirement: 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.



Details

Action: Email In
Subject: Request for information
Details:
Status: Pending
Priority: Normal
Territory: Worldwide
Private: ☐
Created By: Dave Montana
Created Date: 07/08/2014 03:59
Percent Complete:
Completed Time:

Scheduling

Due Date/Time: 07/08/2014 04:30
Start Date/Time:
Onscreen Reminder: ☐
Reminder Date/Time:
Send Reminder Message: ☐
Team: Default
User: Dave Montana
John Finch
Kylie Ward
Susan Maye
--None--

Follow-up

☐ Create Follow-up Task
☐ Create Follow-up Appointment
☐ Create Follow-up Opportunity

Campaigns

Campaign\Wave Activity: TimeNExpense Marketing CampaignMailer to target companies
Response Type: Good

Communication with Campaign Response Codes

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 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 new group based on responses to follow-up calls

User Requirement: Information Manager rights

1. Click **Marketing**.
2. Navigate to the Wave Activity.
3. Click **Create New Group**.
4. Click the **Wave Activity and Response Type** to base the new group on, and enter a description of the group. For example, the wave activity can be Flyer Follow-up Call, and the response Type can be 3-6 Months.
5. Click **Preview List** to review the new group.
6. Click **Save**.

Find out more about groups based on responses to follow-up calls in:

Exporting a group (page 18-11)

Exporting a group

User Requirement: 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.

Setting up outbound call handling

User Requirement: Information Manager rights

Setting up Outbound Call Handling for a campaign involves:

- Creating an Outbound Call wave activity.
- Creating a Outbound Call list.

Find out more about outbound call handling in:

- Creating an outbound call wave activity
- Outbound call fields
- Creating the outbound call list
- Refreshing the outbound call list
- Reallocating calls
- Setting up Key Attribute Profiling Data on the Call Handling screen

Creating an outbound call wave activity

User Requirement: 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

User Requirement: Information Manager rights

The Wave Activity panel fields are described in Campaign, wave and wave activity fields (page 18-3). 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#.
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.

Field	Description
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).
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** (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.
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

User Requirement: 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

User Requirement: 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

User Requirement: 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.

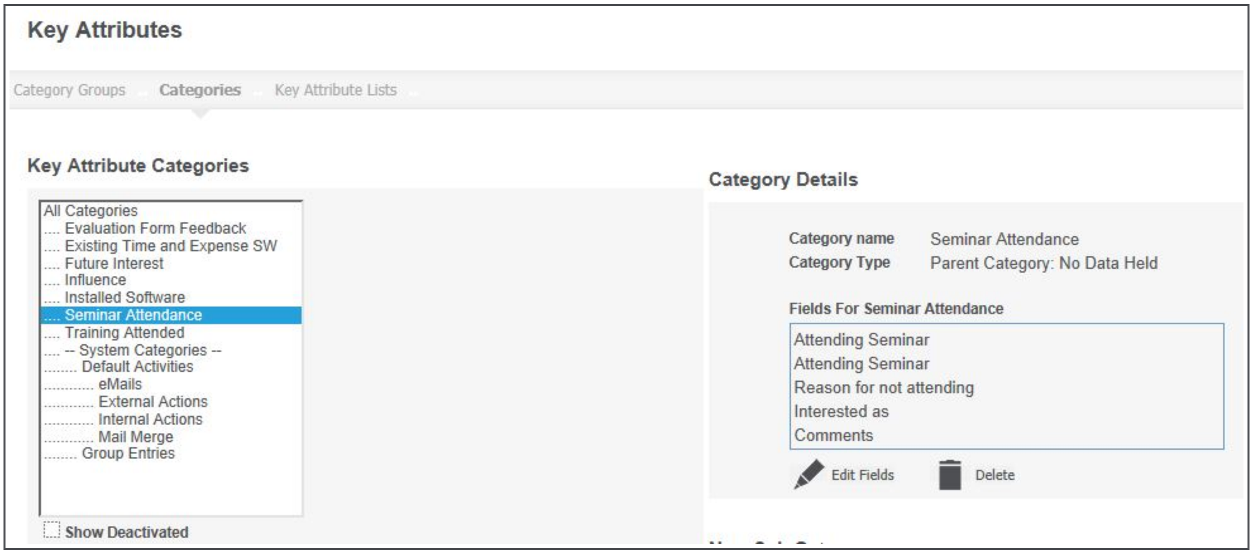
Setting up key attribute profiling data on the Call Handling screen

User Requirement: 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.

Example: 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.



Key Attribute Categories

All Categories
.... Evaluation Form Feedback
.... Existing Time and Expense SW
.... Future Interest
.... Influence
.... Installed Software
.... Seminar Attendance
.... Training Attended
.... -- System Categories --
.... Default Activities
.... eMails
.... External Actions
.... Internal Actions
.... Mail Merge
.... Group Entries

☐ Show Deactivated

Category Details

Category name Seminar Attendance
Category Type Parent Category: No Data Held

Fields For Seminar Attendance

Attending Seminar
Attending Seminar
Reason for not attending
Interested as
Comments

Categories page

Question	**Answer**
Received Invitation	Yes No
Attending Seminar	Yes No
Reason for not attending	Time Budget Not Relevant Other
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.

Field	Description
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, go to **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, please refer to "Key Attribute Profiling" in the System Administrator Help. For more information on Tab Customization, please refer to "Tab Customization" in the System Administrator Help.

Reporting on opportunities generated through campaigns

User Requirement: 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

User Requirement: 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**. All the fields on the Campaign, Wave, and Wave Activity panels are described in Campaign, wave and wave activity fields (page 18-3).
2. Complete the necessary fields, and click **Next** until you have reached the New E-marketing Campaign Step 3 of 3 page.
3. Complete the E-marketing E-mail fields. These are described in E-marketing E-mail Fields (page 18-19). You can **Preview Recipients** to review who will receive the email.
4. 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 and can be viewed from **My CRM | Calendar**. Once results have been synchronized back to 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.

   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.

5. 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

User Requirement: 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 (page 18-18).
- By clicking **New E-marketing E-mail** from **My CRM | Groups**. See Sending E-marketing emails to groups (page 17-14).
- 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. **Note**: 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. These are described in E-marketing E-mail Fields (page 18-19). 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 and can be viewed from My CRM | Calendar. Once results have been synchronized back to 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 E-mail Fields

User Requirement: 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.
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. See Editing E-marketing E-mail Templates (page 18-24) for more information.
View/Edit Template	Allows you to preview and edit the template in the Swiftpage Template Manager.

Field	Description
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

User Requirement: Info Manager Administration Rights and E-marketing enabled.

Before you start, make sure that:

- Your E-marketing Administrator has enabled you for Drip Marketing - check that you have access to the **New Drip Marketing Campaign** action button from **Marketing | E-marketing**.
- You've completed the **e-mail address verification** with Swiftpage - once the E-marketing Administrator enables you for E-marketing, an automated verification email is sent to you. Check your Junk or Spam E-mail folder if you have not received it yet.
- You've access to the **Internet** as communication between Sage CRM and Swiftpage is required for the E-marketing features to work. This is carried out over the Internet.

To set up a Drip Marketing campaign:

1. Click **Marketing | E-marketing**, and click the **New Drip Marketing Campaign** action button. All the fields on the Campaign, Wave, and Wave Activity panels are described in Campaign, wave and wave activity fields (page 18-3).
   Note: The Group is set at campaign level only for drip marketing campaigns. All drip marketing wave activities work from variations on the initial group set up for the campaign. For example, you can set it up so that all recipients who opened and clicked into the first email automatically get added to the next stage, which may be a drip marketing call list activity.
2. Complete the Campaign fields in New Drip Marketing Campaign, Step 1 of 3.
3. Click **Continue**.
4. Complete the Wave fields in New E-marketing Campaign, Step 2 of 3.
5. Click **Continue**.
6. Complete the Wave Activity fields in New E-marketing Campaign, Step 3 of 3. **Note**: The first wave activity of a Drip Marketing campaign must be a Drip Marketing E-mail.
7. Complete the Drip Marketing E-mail fields. These are described in Drip Marketing E-mail Fields (page 18-22).

8. Click **Preview Recipients** to review the people who will receive the email.
9. Click **Save & Send** to complete Step 3. The Drip Marketing E-mail Activity Summary page is displayed.
10. 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 E-mail, or any other standard wave activity types. **Note**: 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.
11. When you're ready to start the Drip Marketing campaign, click the **Launch Drip Marketing Campaign** action button from the E-marketing Campaign Summary page. No changes can be made to the campaign once it has been launched. If you need to make changes, for example, to add another wave activity, click **Suspend Drip Marketing Campaign**.

Creating a Drip Marketing E-mail

User Requirement: 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 (page 18-21).
- 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. **Note**: 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. These are described in Drip Marketing E-mail Fields (page 18-22).
5. Click **Save**. A Drip Campaign communication is created for the user and can be viewed from My CRM | Calendar. 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 E-mail Fields

User Requirement: 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 E-mail Templates (page 18-24) 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

User Requirement: Info Manager Administration Rights and E-marketing enabled.

1. Click **Marketing | E-marketing**, click an existing drip campaign. **Note**: 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. These are described in Outbound call fields (page 18-12). 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 and can be viewed from My CRM | Calendar. 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 E-mail Templates

User Requirement: 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 routes 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	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 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

User Requirement: 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.

Note: 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. **Note**: 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.

Note: The **Drip Marketing User** check box on **the E-marketing User Profile** Tab is not currently available.

Chapter 19: MailChimp campaigns

- What is a MailChimp campaign?
- Adhering to anti-spam regulations
- Logging on to MailChimp
- Adding contacts to a MailChimp list
- Creating a MailChimp campaign
- Deleting a MailChimp campaign
- Viewing MailChimp campaign results

What is a MailChimp campaign?

User Requirement: Your System Administrator must grant you rights to use MailChimp campaigns

MailChimp campaigns let you send automated emails to groups of contacts straight from Sage CRM. You can build campaigns using predefined templates or create a new template from scratch. 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

User Requirement: Your System Administrator must grant you 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 username and password.

3. Select **Stay logged in**.
4. Click **Log In**.

Adding contacts to a MailChimp list

User Requirement: Your System Administrator must grant you 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. It's easy to add groups of contacts directly from Sage CRM to MailChimp.

1. Click **My CRM | Groups** and open a group of companies, people, or leads. If you use a static group, you can't add any new people to the group. Make any updates to this group that you might need. Alternatively, create a new group.
    - The group must include an email column. If this column is missing, the **Send to MailChimp** button doesn't appear.
    - Each contact in the group must have a valid email address. If a contact doesn't have an email address, it won't be added to the MailChimp list.
    - 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.
    - If you need to add people to the group later, create a dynamic group.
2. Click **Send to MailChimp**.

Creating a MailChimp campaign

User Requirement: Your System Administrator must grant you rights to use MailChimp campaigns

Before you set up a MailChimp campaign, ensure you've set up the group of email recipients you want to use in the campaign and have added the group to the existing MailChimp list. You must also be connected to the Internet and have logged on to your MailChimp account.

1. Click **My CRM | MailChimp Campaigns** and click **New**.
2. Enter the campaign details.
    - Enter the campaign name in **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.
    - Specify the email address from which campaign emails are sent in **From Email Address**.
    - Enter the sender's name that appears on campaign emails in **From Name**.
    - Choose the group to which campaign emails are sent in **Segment**.
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. See http://mailchimp.com/features/merge-tags. The merge fields that you can add depend on the context and underlying view you used when defining the group (segment). Possible fields are:

   - **Company**: Company name (comp_name), default person email address (pers_emailaddress), and default company email address (comp_emailaddress). If both the company and person email addresses are on the company view, the company email address is available in MailChimp.
   - **Lead**: Lead description (lead_description) and lead person email address (lead_personemail).
   - **Person**: Person first name (pers_firstname), person last name (pers_lastname), and person email address (pers_emailaddress).

2. Click **Next**.
3. Choose 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, open the campaign in Sage CRM and click **Send MailChimp Campaign**.

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've too many subscribers, you can delete contacts from the MailChimp list. Alternatively, contact your System Administrator to upgrade to a paid plan.

Deleting a MailChimp campaign

User Requirement: Your System Administrator must grant you 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**.

Viewing MailChimp campaign results

User Requirement: Your System Administrator must grant you rights to use MailChimp campaigns

Every hour, 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.

1. Click **My CRM | MailChimp Campaigns**.
2. Click a campaign hyperlink. Statistics about this campaign are displayed in the MailChimp Campaign Results panel.
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.

> For additional information, click **Open Campaign** to open the campaign in MailChimp.

5. 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.
6. Every night, a communication record is created for each email recipient. 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 hyperlink to open a copy of the campaign 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.
Bounced	The number of emails that were not successfully sent and bounced.
Unsubscribed	The number of recipients who unsubscribed from your campaign.
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.

Chapter 20: Cases

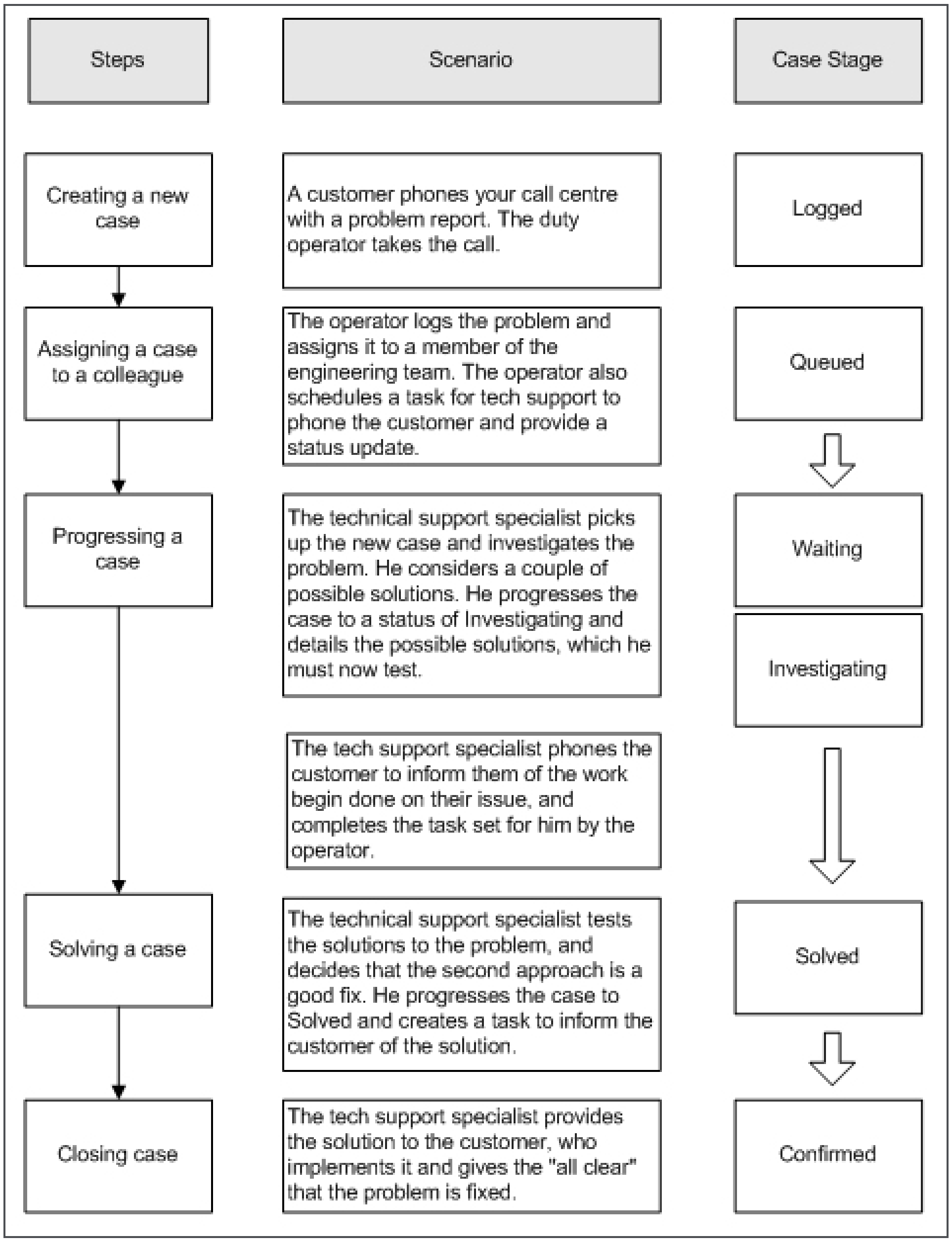
- What is a case?
- Creating a new case
- Assigning a case to a colleague
- Progressing a case
- Solving a case
- Closing a case
- Adding a solution to the solutions knowledge base
- Manually progressing cases
- Viewing the cases pipeline
- Running a case report
- Determining which cases you're working 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.

Solving a Problem: Scenario



Steps	Scenario	Case Stage
Creating a new case	A customer phones your call centre with a problem report. The duty operator takes the call.	Logged
Assigning a case to a colleague	The operator logs the problem and assigns it to a member of the engineering team. The operator also schedules a task for tech support to phone the customer and provide a status update.	Queued
Progressing a case	The technical support specialist picks up the new case and investigates the problem. He considers a couple of possible solutions. He progresses the case to a status of Investigating and details the possible solutions, which he must now test.	Waiting Investigating
	The tech support specialist phones the customer to inform them of the work begin done on their issue, and completes the task set for him by the operator.	
Solving a case	The technical support specialist tests the solutions to the problem, and decides that the second approach is a good fix. He progresses the case to Solved and creates a task to inform the customer of the solution.	Solved
Closing case	The tech support specialist provides the solution to the customer, who implements it and gives the "all clear" that the problem is fixed.	Confirmed

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.

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 (page 4-6).
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.

Field	**Description**
Status	Status of the case. For example, In Progress, Closed.
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.

SLA Status icon	Description
⊖	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 workflow functionality automates the progression of Cases to follow predefined business processes.

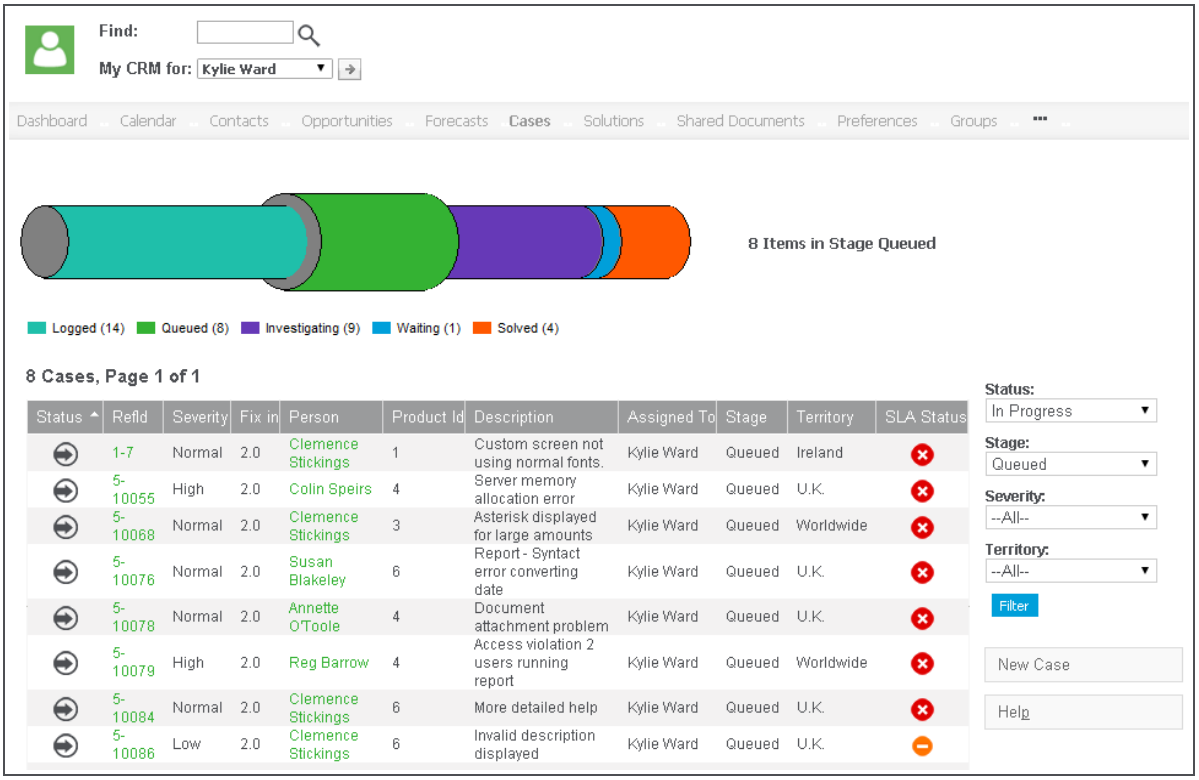
If your system doesn't have Case Workflow enabled, then you will notice that the Case workflow bullets on the right-hand side of the Summary page are replaced by a Progress button. This button allows you to manually change details of the opportunity via the Progress Case page.

Changes are recorded in 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**.



Find:

My CRM for: Kylie Ward

8 Cases, Page 1 of 1

Status	RefId	Severity	Fix in	Person	Product Id	Description	Assigned To	Stage	Territory	SLA Status
➡	1-7	Normal	2.0	Clemence Stickings	1	Custom screen not using normal fonts.	Kylie Ward	Queued	Ireland	✖
➡	5-10055	High	2.0	Colin Speirs	4	Server memory allocation error	Kylie Ward	Queued	U.K.	✖
➡	5-10068	Normal	2.0	Clemence Stickings	3	Asterisk displayed for large amounts	Kylie Ward	Queued	Worldwide	✖
➡	5-10076	Normal	2.0	Susan Blakeley	6	Report - Syntact error converting date	Kylie Ward	Queued	U.K.	✖
➡	5-10078	Normal	2.0	Annette O'Toole	4	Document attachment problem	Kylie Ward	Queued	U.K.	✖
➡	5-10079	High	2.0	Reg Barrow	4	Access violation 2 users running report	Kylie Ward	Queued	Worldwide	✖
➡	5-10084	Normal	2.0	Clemence Stickings	6	More detailed help	Kylie Ward	Queued	U.K.	✖
➡	5-10086	Low	2.0	Clemence Stickings	6	Invalid description displayed	Kylie Ward	Queued	U.K.	⊖

Status: In Progress

Stage: Queued

Severity: --All--

Territory: --All--

Drilling down on the Case pipeline

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 filterbox 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.
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.

Chapter 21: Solutions

- What is a solution?
- Finding solutions
- Viewing solutions
- Adding a new solution
- Creating 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?

User Requirements: Your System Administrator must give you 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.

Finding solutions

1. Click **Find | Solution**.
2. Enter a keyword in **Description** or **Details**. For example, Excel.
3. Select **Contains**. A search is performed for all solutions containing this keyword. Add more search criteria to narrow the results of the search even further.

   > You can use the **%** wildcard to turn the search into a "contains" search.

4. Click **Find**. A list of all solutions meeting your search criteria is displayed.
5. Click the Solution you want to review. The Solution Summary page is displayed.

Viewing solutions

User Requirements: Your System Administrator must give you rights to access Solutions

There are several ways to view solutions.

- Open a Case record and click the **Solutions** tab.
- Click **Find | 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.
    - Click **<My Profile> | Preferences**.
    - Click **Change**.
    - Set **Show Solutions In My CRM** to **Yes**.
    - Click **Save**.

Adding a new solution

1. Click **New | New Solution**. The New Solution page is displayed.
2. Enter details in the solutions fields.
3. Click **Save**. The Summary page for the new solution is displayed.

From within the context of a Solution:

- 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.

- Open the solution so that the Solution Summary page is displayed.
- Click **Change**.
- 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.

Chapter 22: Interactive dashboard

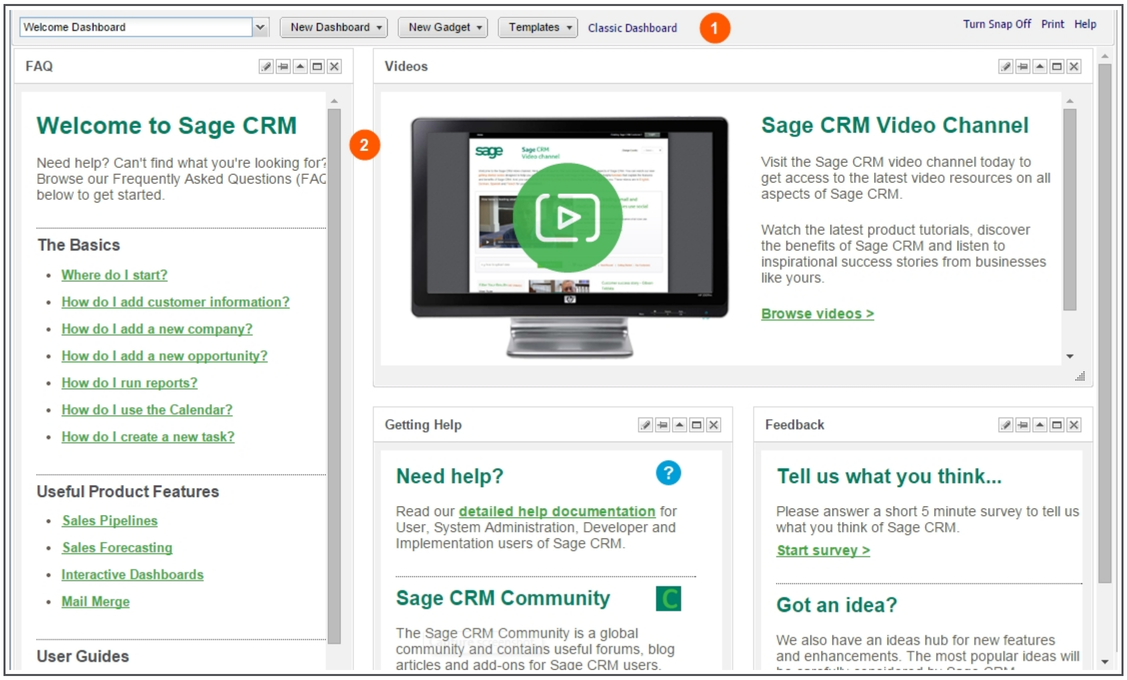
- Dashboards
- Gadgets
- Templates

Dashboards

- What's 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

What's 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 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.



Welcome to Sage CRM

Need help? Can't find what you're looking for? Browse our Frequently Asked Questions (FAQ below to get started.

The Basics

- Where do I start?
- How do I add customer information?
- How do I add a new company?
- How do I add a new opportunity?
- How do I run reports?
- How do I use the Calendar?
- How do I create a new task?

Useful Product Features

- Sales Pipelines
- Sales Forecasting
- Interactive Dashboards
- Mail Merge

User Guides

Sage CRM Video Channel

Visit the Sage CRM video channel today to get access to the latest video resources on all aspects of Sage CRM.

Watch the latest product tutorials, discover the benefits of Sage CRM and listen to inspirational success stories from businesses like yours.

Browse videos >

Need help?

Read our detailed help documentation for User, System Administration, Developer and Implementation users of Sage CRM.

Sage CRM Community

The Sage CRM Community is a global community and contains useful forums, blog articles and add-ons for Sage CRM users.

Tell us what you think...

Please answer a short 5 minute survey to tell us what you think of Sage CRM.

Start survey >

Got an idea?

We also have an ideas hub for new features and enhancements. The most popular ideas will

Interactive dashboard

1. Control bar

This lets you choose from the list of available dashboards, or create your own gadgets, dashboards and templates. You can also **Turn Snap On/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 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.
5. Give the dashboard a **name**. You can also choose 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.

> To make the ready-to-use Management dashboards available to other users, you must assign the users to the management dashboard templates.

Management dashboards

User Requirement: System Administrator rights to view Management dashboards and make them available to other users

There are two ready-to-use Management dashboards. Each dashboard includes configurable gadgets that use Sage CRM data from across your organization.

- **Sales KPI for Managers** displays key performance indicators to help you identify and measure your organization's successful activities.
  - **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.
- **Sales Metrics for Managers** displays information to help you measure progress towards your organization's goals.
  - **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.

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. **Note**: 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. Please refer to Working with dashboard templates (page 22-22) for more information.

Creating a new dashboard

1. Click **My CRM | Dashboard | New Dashboard | Create Dashboard**. The Dashboard Details dialog box is displayed.
2. Set the type to Flexible or Fixed layout. **Note**: Once selected, and the dashboard is on your workspace, you cannot change 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.
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 is displayed.
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 an overview of the interactive dashboard, see What's the interactive dashboard? (page 22-1)

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** ink if you need to.
3. Click **New Dashboard | Create Dashboard** and add the gadgets you want. For more information, see Gadget quick reference (page 22-8).
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 is displayed 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**. The Gadget wizard is displayed.
3. Select the type of gadget you want to add. For more information, see Gadget quick reference (page 22-8).
4. Complete the gadget wizard steps. The new gadget is displayed on your dashboard.

Gadget quick reference

Gadget	Description
Calendar gadget (page 22-9)	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 (page 22-10)	Display a report chart, drill into the associated report search criteria, run the full report, and use built-in animation.
List gadget (page 22-10)	View, filter, and carry out actions on lists. Can be linked to other list and record summary gadgets for dynamic filtering.
To add a new main menu item gadget: (page 22-11)	Add multiple CRM or web site icons to a single gadget. CRM actions include main menu actions such as Find Quote and New Lead.
Notification gadget (page 22-12)	View and drill into notification alerts, dismiss or snooze individual or all notifications.
Record summary gadget (page 22-12)	View a Sage CRM record’s summary page. Must be linked to a list gadget to display data.
RSS feed gadget (page 22-12)	Displays an RSS feed. User name and password details can be preset for feeds requiring authentication.
SData list gadget (page 22-13)	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 (page 22-14)	View an SData record’s summary page. Must be linked to an SData list gadget to display data.

Gadget	Description
Summary gadget (page 22-14)	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 (page 22-15)	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.
Website Gadget (page 22-16)	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. Please refer to Website Gadget (page 22-16) for more details. This format can also be used to link to third-party gadgets. Please refer to the *Developer Guide* for more details.

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. **Note**: 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:

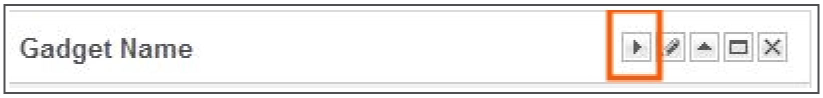
1. Click **Chart** from the Gadget Wizard. A list of reports with charts is displayed.
2. Select the chart or report title from the list of report charts. Use the **Filter by** field to narrow the list of charts. **Filter by** works on a "Begins with" basis.
3. Click **Next**.
4. Select a **Default Action**. **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 is displayed.
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. **Note**: 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 interacting with charts, see Running a report (page 11-1).

> 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.

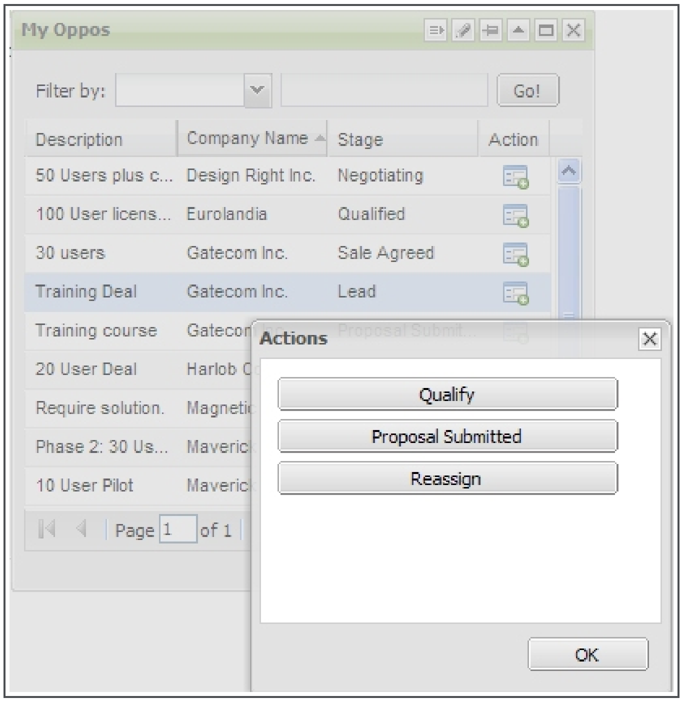
List gadget

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 of columns that you can include on the gadget is displayed.
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.



Drill Down Action icon on gadget header

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**. Carries out a search on the Person Last Name and/or the Company Name from CRM in LinkedIn. 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.



Description	Company Name	Stage	Action
50 Users plus c...	Design Right Inc.	Negotiating	
100 User licens...	Eurolandia	Qualified	
30 users	Gatecom Inc.	Sale Agreed	
Training Deal	Gatecom Inc.	Lead	
Training course	Gatecon	Proposal Submit...	
20 User Deal	Harlob C		
Require solution.	Magneti		
Phase 2: 30 Us...	Maveric		
10 User Pilot	Maveric		

Default Action Go To Summary Screen icon (left) and Workflow Anchor Column icon (right)

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 **CRM** or **URL** from the left-hand drop-down field.
    - CRM gives you 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.
    - For URL, type the web address (in the format http[s]://www.website.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. Please refer to Linking gadgets (page 22-16) for more information.

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 (in the format http[s]://www.website.com).
3. Select the **Authentication** check box to 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.
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 from:
    - **Sage CRM SData feed** - to create a gadget based on data from CRM's internal SData feed.
    - **Pre-configured SData feed** - to create 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** - to create 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]://*server[:port]*/**sdata**/*application*/*contract*/*resource kind*/**$schema**
        - For more information on constructing custom SData feeds, see the *Developer Help* for the on-premise version of Sage CRM posted on 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. 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. 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 **ellipses** (...) 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 logical Ands. 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** it 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:

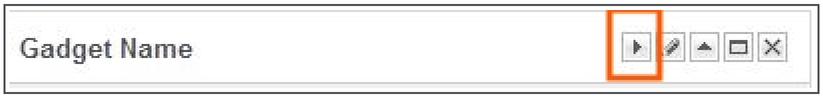
1. Click **SData Record Summary** from the Gadget Wizard.
2. Select from Sage CRM SData feed, Pre-configured SData feed, or Custom SData feed. These are described in SData list gadget (page 22-13).
3. Click **Next**.
4. Click an **entity** to base your gadget on from the list.
5. Click **Next**.
6. Click 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. Please refer to Linking gadgets (page 22-16) for more information.

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, you can choose from **Icons View** or **List View**. For a single data source you can also choose **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.

   Drill Down Action icon on gadget header

   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. **Note**: 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 to other task list, list, or record summary gadgets. Please refer to Linking gadgets (page 22-16) for more information.

Website Gadget

To add a new website gadget:

1. Click **Web Site** from the Gadget Wizard.
2. Type or paste the **Web Address** (in the format http[s]://www.website.com), or select a **Content Block**, which has been predefined 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.
3. Click **Next**.
4. Add a **Name** and **Description** for the gadget.
5. Click **Finish**.

Displaying a Static URL

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 1:

#crm_server#/StaticContent/abcd.html

Relates to a file called **abcd.html** in a folder created off the WWWRoot folder called StaticContent.

This format can also be used to link to third-party gadgets. Please refer to the *Developer Guide* for more details.

Example 2:

#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 (it would appear on the file system as WWWRoot\StaticContent\uk\ecosystem\CommunityLinks.htm).

Editing gadget content

To edit a gadget which is already on a dashboard:

1. Click the **pencil 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.

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**. **Note**: Record Summary gadgets can only "receive data from" other gadgets. For this example, choose 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.

Notes on SData gadget linking

- An advanced (System Administrator) level of understanding of the SData feed source (i.e. 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.

Please refer to the SData example in the section below for more information.

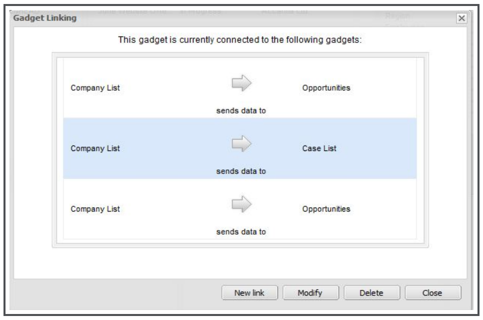
Multiple Gadget Linking Examples

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.

The following examples show how this can be set up in practice.

Example 1: Sending data from a Company List gadget to Case List, Opportunity List, and Company Record Summary gadgets

Links can be set up from a company gadget to a case list gadget, an opportunity list gadget, and a company record summary gadget.

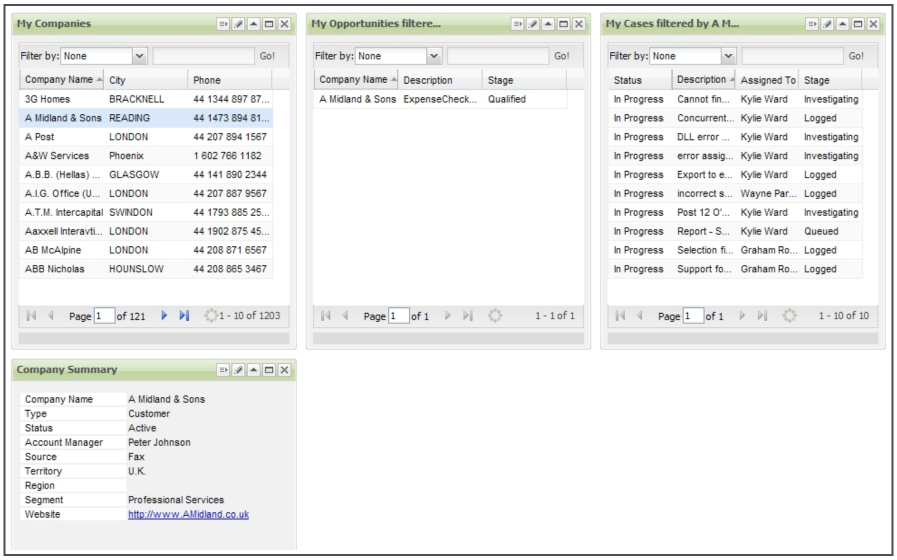


This gadget is currently connected to the following gadgets:

Company List	sends data to	Opportunities
Company List	sends data to	Case List
Company List	sends data to	Opportunities

Gadget linking dialog

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.



Company Name	City	Phone
3G Homes	BRACKNELL	44 1344 897 87...
A Midland & Sons	READING	44 1473 894 81...
A Post	LONDON	44 207 894 1567
A&W Services	Phoenix	1 602 766 1182
A.B.B. (Hellas) ...	GLASGOW	44 141 890 2344
A.I.G. Office (U...	LONDON	44 207 887 9567
A.T.M. Intercapital	SWINDON	44 1793 885 25...
Aaxxell Interavti...	LONDON	44 1902 875 45...
AB McAlpine	LONDON	44 208 871 6567
ABB Nicholas	HOUNSLOW	44 208 865 3467

Company Name	Description	Stage
A Midland & Sons	ExpenseCheck...	Qualified

Status	Description	Assigned To	Stage
In Progress	Cannot fin...	Kylie Ward	Investigating
In Progress	Concurrent...	Kylie Ward	Logged
In Progress	DLL error ...	Kylie Ward	Investigating
In Progress	error assig...	Kylie Ward	Investigating
In Progress	Export to e...	Kylie Ward	Logged
In Progress	incorrect s...	Wayne Par...	Logged
In Progress	Post 12 O'...	Kylie Ward	Investigating
In Progress	Report - S...	Kylie Ward	Queued
In Progress	Selection fi...	Graham Ro...	Logged
In Progress	Support fo...	Graham Ro...	Logged

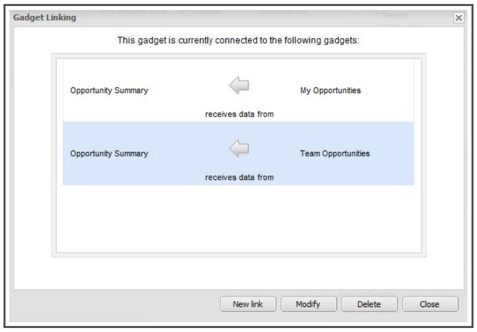
Company Name	A Midland & Sons
Type	Customer
Status	Active
Account Manager	Peter Johnson
Source	Fax
Territory	U.K.
Region	
Segment	Professional Services
Website	http://www.AMidland.co.uk

Gadget linking between one sender (My Companies list) and multiple receivers (My Opportunities list, My Cases list, and Company Summary gadget)

In the example described above, 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.

Example 2: Sending 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).



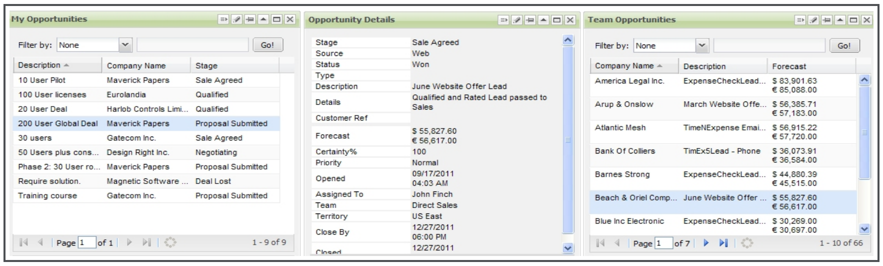
This gadget is currently connected to the following gadgets:

Opportunity Summary receives data from My Opportunities

Opportunity Summary receives data from Team Opportunities

Gadget linking dialog

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.



Description	Company Name	Stage
10 User Pilot	Maverick Papers	Sale Agreed
100 User licenses	Eurolandia	Qualified
20 User Deal	Harlob Controls Limi...	Qualified
200 User Global Deal	Maverick Papers	Proposal Submitted
30 users	Gatecom Inc.	Sale Agreed
50 Users plus cons...	Design Right Inc.	Negotiating
Phase 2: 30 User ro...	Maverick Papers	Proposal Submitted
Require solution.	Magnetic Software ...	Deal Lost
Training course	Gatecom Inc.	Proposal Submitted

Stage	Sale Agreed
Source	Web
Status	Won
Type	
Description	June Website Offer Lead
Details	Qualified and Rated Lead passed to Sales
Customer Ref	
Forecast	$ 55,827.60 € 56,617.00
Certainty%	100
Priority	Normal
Opened	09/17/2011 04:03 AM
Assigned To	John Finch
Team	Direct Sales
Territory	US East
Close By	12/27/2011 06:00 PM
Closed	12/27/2011

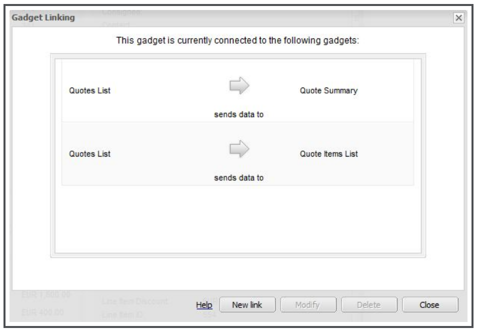
Company Name	Description	Forecast
America Legal Inc.	ExpenseCheckLead...	$ 83,901.63 € 85,088.00
Arup & Onslow	March Website Offe...	$ 56,385.71 € 57,183.00
Atlantic Mesh	TimeNExpense Emai...	$ 56,915.22 € 57,720.00
Bank Of Colliers	TimEx5Lead - Phone	$ 36,073.91 € 36,584.00
Barnes Strong	ExpenseCheckLead...	$ 44,880.39 € 45,515.00
Beach & Oriel Comp...	June Website Offer ...	$ 55,827.60 € 56,617.00
Blue Inc Electronic	ExpenseCheckLead...	$ 30,269.00 € 30,697.00

Gadget linking between one receiver (Opportunity Summary gadget) and multiple senders (My Opportunities list, Team Opportunities list gadget)

In the example described above, 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.

Example 3: Linking SData List and SData Record Summary gadgets

Links can be set up from an SData List gadget (Quotes List - using **quot_orderquotid**), to another SData List gadget (Quote Items - using **quit_orderquoteid**) , and from 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) .

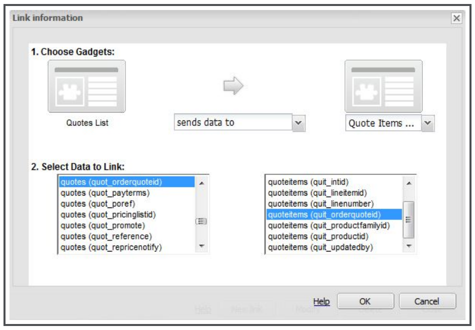


This gadget is currently connected to the following gadgets:

Quotes List sends data to Quote Summary

Quotes List sends data to Quote Items List

Gadget linking dialog on SData Quotes List



1. Choose Gadgets:

Quotes List — sends data to — Quote Items ...

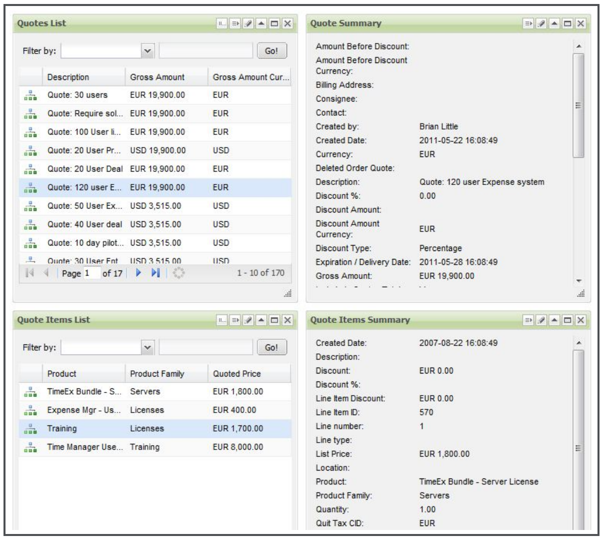
2. Select Data to Link:

quotes (quot_orderquoteid)
quotes (quot_payterms)
quotes (quot_poref)
quotes (quot_pricinglistid)
quotes (quot_promote)
quotes (quot_reference)
quotes (quot_repricenotify)

quoteitems (quit_intid)
quoteitems (quit_lineitemid)
quoteitems (quit_linenumber)
quoteitems (quit_orderquoteid)
quoteitems (quit_productfamilyid)
quoteitems (quit_productid)
quoteitems (quit_updatedby)

Link Information dialog on SData Quotes List to SData Quote Items List

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.



Description	Gross Amount	Gross Amount Cur...
Quote: 30 users	EUR 19,900.00	EUR
Quote: Require sol...	EUR 19,900.00	EUR
Quote: 100 User li...	EUR 19,900.00	EUR
Quote: 20 User Pr...	USD 19,900.00	USD
Quote: 20 User Deal	EUR 19,900.00	EUR
Quote: 120 user E...	EUR 19,900.00	EUR
Quote: 50 User Ex...	USD 3,515.00	USD
Quote: 40 User deal	USD 3,515.00	USD
Quote: 10 day pilot...	USD 3,515.00	USD
Quote: 30 User Ent	USD 3,515.00	USD

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Amount Before Discount:	
Amount Before Discount Currency:	
Billing Address:	
Consignee:	
Contact:	
Created by:	Brian Little
Created Date:	2011-05-22 16:08:49
Currency:	EUR
Deleted Order Quote:	
Description:	Quote: 120 user Expense system
Discount %:	0.00
Discount Amount:	
Discount Amount Currency:	EUR
Discount Type:	Percentage
Expiration / Delivery Date:	2011-05-28 16:08:49
Gross Amount:	EUR 19,900.00

Product	Product Family	Quoted Price
TimeEx Bundle - S...	Servers	EUR 1,800.00
Expense Mgr - Us...	Licenses	EUR 400.00
Training	Licenses	EUR 1,700.00
Time Manager Use...	Training	EUR 8,000.00

Created Date:	2007-08-22 16:08:49
Description:	
Discount:	EUR 0.00
Discount %:	
Line Item Discount:	EUR 0.00
Line Item ID:	570
Line number:	1
Line type:	
List Price:	EUR 1,800.00
Location:	
Product:	TimeEx Bundle - Server License
Product Family:	Servers
Quantity:	1.00
Quit Tax CID:	EUR

Gadget linking between SData Lists and SData Record Summary gadgets (Quotes and Quote Items)

In the example described above, 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.

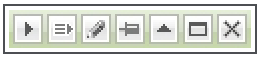
Modifying gadgets

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). Please see Modifying a gadget template (page 22-25) for more information.

Gadget Header Icons

The gadget header displays a number of icons.



Gadget header 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. Please refer to Linking gadgets (page 22-16) for more information.

Edit. Opens the first step of the gadget wizard for the current gadget.

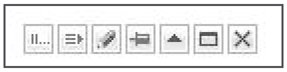
Enable/disable resizing and dragging. Fixes the position and size of the gadget. Available in flexible dashboard layout only. Toggles the resize icon in the lower right-hand corner of the gadget with a pin icon. When gadgets are moved around in flexible layout you can also toggle a snap-to-grid link (**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.



SData gadget header icons

Changing the Gadget Column Layout

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 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 adding these types of data sources, please refer to:

Groups (page 17-1)
Writing reports (page 10-1)
Creating a saved search (page 3-11)
Using Advanced Find (page 3-5)
Adding an SData feed template (page 22-25)

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.

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

User Requirement: 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.

Field or Button	**Description**
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

User Requirement: Information Manager rights

1. Click the **My CRM | Dashboard** tab.
2. Click **Template | Dashboard Templates | New**.
3. Set the type to **Flexible** or **Fixed** layout. This defaults to Flexible. 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

User Requirement: 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

User Requirement: 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

User Requirement: 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

User Requirement: 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 CRM.

Adding a template gadget

User Requirement: 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 (page 22-8).
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

User Requirement: 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

User Requirement: 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

User Requirement: 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]://*server[:port]*/**sdata**/*application*/*contract*/*resource kind*/**$schema** For more information on constructing custom SData feeds, see the *Developer Help* for the on-premise version of Sage CRM posted on 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.

Chapter 23: 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?

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 CRM.
- Your default dashboard.

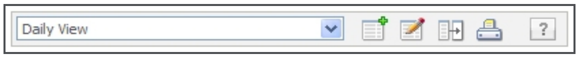
Setting up a new classic dashboard

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** moves 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.



Dashboard toolbar

- 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 CRM by selecting Dashboard from the Log Me Into field on **<My Profile> | Preferences**.

Changing content directly from the classic dashboard page

> 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. **Note**: 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 is longer than 10 records, or 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

> 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**. **Note**: 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

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

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

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**.
3. The Dashboard Content page is displayed.
4. Click the **Other** category from the Filter By drop-down list.
5. Click **Add** next to the Favorite Reports content item.

6. Click **Save**. The dashboard page is displayed. The Favorite Reports content panel is displayed on the dashboard with all of your favorite reports.
7. Click the report you want to run. The report Display Options are displayed in a new window.
8. 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

The classic dashboard is a legacy feature that's available for upgrade customers only.

User Requirement: Info Manager Administration 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. Check the **Available On Classic/Interactive Dashboard** checkbox on the Chart Options panel, and complete the other Chart Options fields. **Note**: 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 interacting with charts, see Running a report (page 11-1).

Setting up a classic company dashboard

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

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.

Chapter 24: Preferences

- User preferences
- Preference fields
- Changing preferences

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.

You can and reset your password on your User Preferences page.

> The **Install CRM Outlook Integration / Install CRM Outlook Exchange Integration** button is displayed on the Preferences page. For more information, see Downloading the Outlook plug-in for Classic Outlook integration (page 8-1)Installing the Outlook Plug-in for Exchange Integration (page 7-7).

Preference fields

The table below describes the standard user preference fields.

Field	Description
Log Me In To	Set the first page you want to see when you log on. For example, Dashboard, Calendar, or Opportunity list.
Empty Recent List For Each Session	Select **Yes** to empty the Recent list each time you log off. The Recent list provides quick access to the most recent records you've visited in Sage CRM.
Recent List Activation By	Choose how to open the Recent list. You can Click or Hover. Please refer to Appointments and tasks (page 5-1) for more information.
Pop Out List Activation By	Choose from Hover or Click. You can hover or right-click the menu buttons to activate the pop-out lists.

Field	**Description**
My Default Find Screen	Set the Find screen that appears at the beginning of a session. Note that the system "remembers" your last Find, until you change it. This means you can set your default Find screen to be Company. However, as soon as you search by Person, the next time you press Find, the person Find page is displayed.
Show Solutions In My CRM	Display the **Solutions** tab in the My CRM Main menu. The System Administrator must give you rights to view Solutions.
Show Outbound Calls In My CRM	Display the **Outbound Calls Lists** tab in the My CRM Main menu.
Currency	Set the currency you want to work with. This is implementation dependent.
Show Leads Pipeline	Display or hide the leads pipeline on the **Leads** tab within My CRM and Team CRM.
Show Opportunities Pipeline	Display or hide the opportunities pipeline on the **Opportunities** tab within My CRM and Team CRM.
Show Cases Pipeline	Display or hide the cases pipeline on the **Cases** tab within My CRM and Team CRM.
Grid Size	Set the default maximum length of lists and grids on a page.
Email Screen Position	Display the New Email screen in Normal or Popup view. If you're working with Sage CRM in Outlook, the New Email screen is always displayed in a popup window.
Line Item Screen Position	Display the Line Item screen in Popup or Split view.
Report Print Preview Default Page size	Set the default page size used on the Report Display Options page for reports in PDF format.
Report Print Preview Default Orientation	Set the default orientation (portrait or landscape) used on the Report Display Options page for producing a report in PDF format.

Field	Description
On-screen Coaching	Set how on-screen coaching is displayed. **On**. Turn coaching on for all screens for which coaching is available. **Off**. Turn all coaching off. **Minimized**Coaching is minimized until you click **Maximize On-screen Coaching**. **Customized**. Allow users to minimize onscreen coaching on some screens, and leave it maximized on others.
Single-Column Calendar	Set to **Yes**, the calendar uses a single-column format. Set to **No**, the daily view can be displayed in an Outlook-style view with equal spacing between vertical time slots. If you've multiple appointments at the same time, they are placed in columns next to each other .
Number of Calendar Columns	The maximum number of columns in the calendar when **Single-Column Calendar** is set to **No**. When this number is exceeded, additional rows are created. For example, if **Number of Calendar Columns** is set to **4** and seven events are created, four events are displayed in the first row and three events are displayed in the second row.
Full Menu in Outlook	This field applies to Classic Outlook integration using Outlook 2007 only.
Preferred Theme	Customize the look and feel of the user interface. Your System Administrator defines which themes are available to you. Log off and on again to apply the new theme. **Note**: Themes don't apply to System Help and Self Service.

Field	**Description**
CSV File Export Delimiter	Set the CSV delimiter as comma, semi-colon, or tab for files you export to CSV. When you click **Export To File**, for example on a list of Company records, the CSV file uses the delimiter you have set. This setting also impacts data uploads from CSV files. The delimiter in the import file must match the delimiter set here.
Default Screen For Company	Set the first tab you want to see when you open a Company record. Choose the Summary tab or the Interactive Dashboard tab.
Default Email Template	Set a default email template. This is used automatically when you create a new email in Sage CRM.
Default Email Address	Set the default **From** email address used on the New Email screen. This works only if you're allowed to send emails from other accounts.
Default Tablet Version	Set to Desktop Version to use the desktop version of Sage CRM on a tablet device. Set to Tablet Version if you want to use the Tablet theme from a tablet device.
Calendar View	Set the default Calendar view. For example, Day, Month, Week, Year.
Calendar Start Time	Set the start time of the Calendar view on communications. This also adjusts the shaded area in the meeting planner.
Calendar End Time	Set the end time of the calendar view on communications. This also adjusts the shaded area in the meeting planner.
My Week Starts On	Set the first day of the weekly calendar view.
Date Format	Date format preference. For example, select mm/dd/yyyy to see the date in Month/Day/Year format.
Use AM/PM	Select **Yes** to use AM/PM time format, or select No to use 24hr format.

Field	**Description**
Time Zone	The zone you select must match your computer settings. Each user's timezone must be set. This is especially important if you want to synchronize with Microsoft Outlook. There are 75 timezones to choose from. The one you select defines what daylight settings are used. All times are relative to the logged on user. For example, a meeting made at 09:00 GMT by one user appears at 10:00 to users in +1:00 GMT. The System Administrator sets the server timezone.
Decimal Point	Set the decimal point. For example, period [.] or comma [,].
Decimal Places	The preferred 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, period [.] or comma [,].
Default Targets For High Priority Reminder Messages	Set the way a reminder is sent out for a high priority Communication. You must select **Send Reminder Message** first. For more information, see Appointments and tasks (page 5-1).
Default Targets For Normal Priority Reminder Messages	Set the way a reminder is sent out for a normal priority Communication. You must select **Send Reminder Message** first. For more information, see Appointments and tasks (page 5-1).
Default Targets For Low Priority Reminder Messages	Set the way a reminder is sent out for a low priority Communication. You must select **Send Reminder Message** first. For more information, see Appointments and tasks (page 5-1).

Changing preferences

1. Click **<My Profile> | Preferences**. The **Preferences** page is displayed.
2. Click **Change**.
3. Make your changes to the user preference fields.
4. Click **Save**.

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

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. For example, the My CRM | Calendar list defaults to filter out all pending communications for the current user. The user can narrow the list further by filtering all pending meetings.

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

Find page

The Find page is displayed when the user selects the Find menu button. 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.

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.

Notification

The notification feature is implementation dependent. When the notification feature is switched on, notifications act as reminders for upcoming or overdue tasks. They are set in the Communications Details page and appear either on-screen in red text, or as e-mail or SMS messages. They can also be integrated into the workflow functionality.

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.

Pop Out List

You can hover or right-click on the menu buttons to activate Pop Out lists. These allow you to quickly navigate through CRM.

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 Look

The Quick Look tab shows you the most recent communications, opportunities and cases associated with a company or person.

R

Recent list

The Recent list is located in the top left-hand corner of your screen. Clicking the recent list or hovering over it, allows you to select and return to the companies, people, opportunities, leads, solutions, or cases you were most recently dealing with.

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 &lt;insert symbol image&gt; 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.

Theme

Themes allow you to customize look and feel of the CRM user interface. For example, you may prefer a green/gray based look to a blue/white based look. Your Administrator defines the themes available to you and can add new ones to suit your corporate identity. Your preferred theme can be set in My CRM | Preferences.

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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