Sage CRM

7.2

User Guide

Contents

Chapter 1: About This Guide

This guide is for Sage CRM end users.

We assume that you are familiar with the use of a Web browser.

How this Guide is Organized

Chapter Format

Each chapter follows the same format:

- A checklist sets the goals for each chapter.
- Step-by-step examples to give you hands-on practice of each section.
- Tables to explain the meaning of fields.

Chapter Summary

The tables below give a summary of each chapter.

Part I: Basics

This part is for all users. Basic navigation is covered in this section.

Chapter	Description
Getting Started	Logging on and basic navigation.

Part II: Contact Management

This part is for all users. Basic contact management is covered in this section.

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.
E-mail	How to send and reply to e-mails from CRM, and make use of e-mail templates.
Exchange Integration	Working with Sage CRM Exchange Server Integration, and installing the Outlook plug-in.

Chapter	Description
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 e-mailing.
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

This part is for sales users.

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

This part is for marketing users.

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.

Part V: Customer Service

This part is for customer service users.

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

This part looks at tools you can use to customize your work area. It also shows users with Info Manager Reporting rights how to create new reports.

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 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.

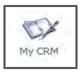
Browse Customer Information

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

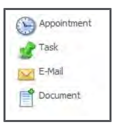
Communication Management:



- 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, e-mails, and proposals using standard templates.
- Store all documents as part of shared customer history.
- Attach documents to communications.
- Send e-mails 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.

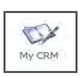
Provide Customer Service

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

In this chapter you will learn how to:

- Get to the logon page.
- Log on.
- Log off.
- Change my password.
- Reset my password if I have forgotten it.
- Find my way around the different screen areas.
- Know what information is stored where.
- Find my personal work area.
- Use mouse and keyboard navigation.
- Use on-screen coaching.

Starting the Logon Page

To reach the logon page:

1. Open your Web browser.
2. Enter the URL given to you by your System Administrator. For an *On-Premise system*, this typically looks like this: http://yourserver/yourapp

   Your browser displays the Logon page.

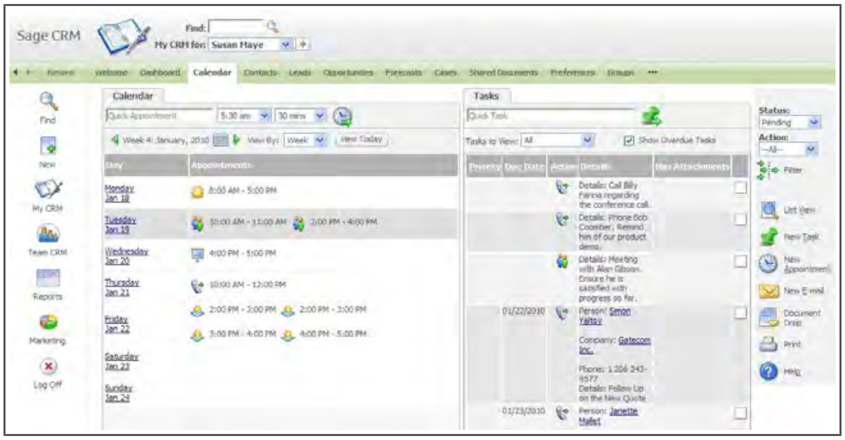
Logon page

Logging On

To log on:

1. From the Log On page, enter the **User Name** and **Password** provided by your System Administrator.
2. Click on the **Log On** button.

Depending on your system configuration and user preference settings, a successful logon displays an area within My CRM, for example, your weekly calendar.



Weekly Calendar

Changing Your Password

To change your password from the logon page:

- Select the **Change Password** check box. Then from the Change Password screen, type your old password in the **Old Password** field and type the new one in the **New Password** and **Confirm Password** fields. Once you do this select the **Log On** button.

To change your password once you have logged on:

- Select **My CRM** | **Preferences**, and click on the **Change Password** action button. Then from the Change Password screen, type your old password in the **Old Password** field and type the new one in the **New Password** and **Confirm Password** fields. Once you do this select **Save**.

For *On-Premise* users, 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 use an *On-Premise system* and have forgotten your password and therefore cannot log onto the system, you need to contact your System Administrator who will reset it for you.

Logging Off

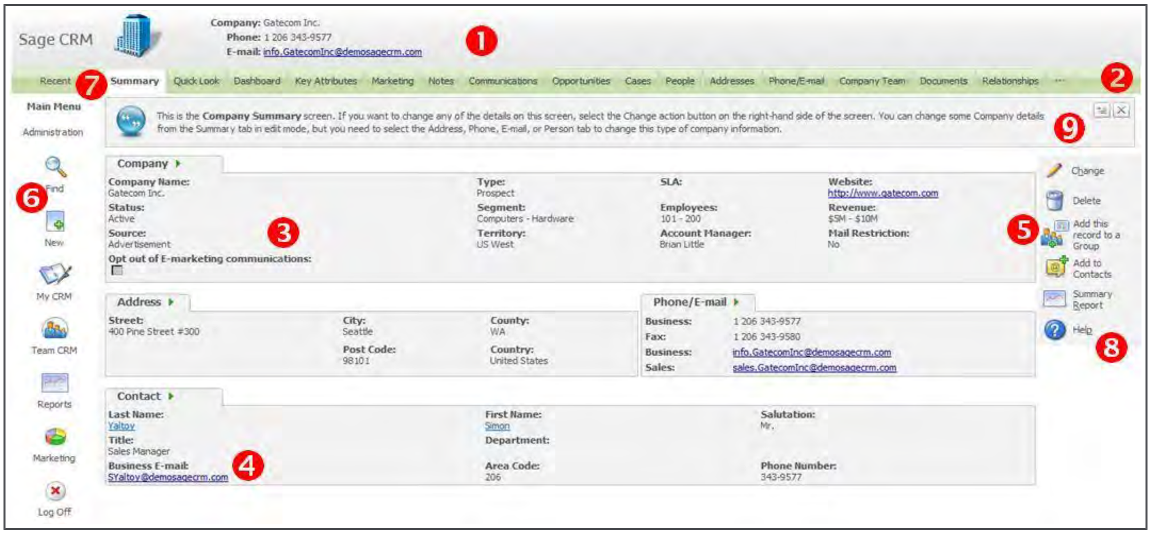
To log off:

- Click on the **Log Off** button.

You are automatically logged off if you close the browser or navigate to another site within the same browser window.

Basic Screen Elements

The basic screen elements in CRM are:



1. Context Area
2. Tabs
3. Panel
4. Hyperlinks
5. Action Buttons
6. Menu Buttons
7. Recent List
8. Help
9. On-screen Coaching

Context Area

The Context Area displays a summary of the information you are currently focused on. For example, when you are in the context of a person, all the information displayed in the Tabs and Panels below the context area relates to this person.

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.

Tabs

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" is zoomed in on in the context area, selecting the Communications Tab displays the most recent interactions your company has had with Ms. Chapman.

Panel

Panels display information on, for example, the person in the current context. One page of information can be divided into a number of panels. Each panel groups related information for easier viewing.

Hyperlinks

Hyperlinks allow you to jump from one page to another. For example, when you click on a company name, the Summary page associated with that company is displayed in the work area. All e-mail and Web site addresses are hyperlinked. You can click on an e-mail address to send an e-mail straight away, or on a Web site address to navigate to the Web site.

Action Buttons

As you work with the system you will certainly need to change the data, for example, add new addresses, alter contact information, or progress sales opportunities. Action buttons on the right-hand of the screen let you work with data. The Action buttons available change depending on the context you are in.

Menu Buttons

You can move directly from one work area to another with the Menu buttons on the left-hand side of your screen. The Menu buttons available to you remain the same regardless of the company or person or any other context you are working in.

- Click on **Find** to search for a company, person, case, opportunity, lead, quote, order, communication, solution, or to perform an advanced find or keyword search.
- Click on **New** to create a new company, person, solution, case, opportunity, lead, quote, order, appointment, task, e-mail, or document.
- Click on **My CRM** to display a series of tabs with information relating to your work in progress.
- Click on **Team CRM** to view your team's activities.
- Click on **Marketing** to set up new marketing campaigns.
- Click on **Reports** to run reports on customer information.
- Click on **Log Off** to exit the system.

The number of menu buttons you can see is set up by your System Administrator in your user profile.

Menu Button Pop Out Lists

Right-clicking or hovering over the menu buttons gives you access to shortcut pop out lists accessible from anywhere in the system.

Recent List

The Recent List can be viewed on the top left-hand corner of your screen. It allows you to quickly select and return to the company, person, opportunity, quote, order, lead, case, solution, campaign or group you were most recently dealing with.

The Recent List can be activated by clicking on or hovering over the **Recent** button. You can define how you want to activate the list from the Preferences tab in My CRM.

The Recent List is set to a default maximum size of 40, but it can be resized. Please refer to your System Administrator for more details.

As well as returning to a specific record, selecting one of the recent list heading icons returns you to the corresponding find page. For example, selecting the Person heading icon, displays the person Find page. Selecting Clear, clears the list. Selecting the Groups heading takes you to the My CRM | Groups tab.

Tabs

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" is zoomed in on in the context area, selecting the Communications Tab displays the most recent interactions your company has had with Ms. Chapman.

Company Tabs

This section discusses each tab within the context of a company. The purpose of this is to give you an overview of the different types of information held in the system, and how they fit together.

- The **Summary** tab shows the core company details, the phone and e-mail, principal address, and contact.
- If you want to know your recent history with this company at a glance, click on the **Quick Look** tab. It lists the most recent communications, sales opportunities, and cases linked to the company.
- The **Dashboard** tab within the Company context can be used to 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
- If **Key Attribute Profiling** has been set up for Companies, you can use the **Key Attributes** tab to record additional information about the company that is not provided for by the standard Company fields.
- The **Marketing** tab can be fully customized to your needs to track information, such as detailed company segmentation information.
- You can add general free text information on the company under the **Notes** tab. For example, a recent press release indicates the company is due to merge with another company. This information can be added to the Company Notes.
- The **Communications** tab shows all the phone calls, meetings, and day-to-day correspondence with this company.
- The **Opportunities** tab shows your sales pipeline, past and planned, for this company.
- If you want to see how good your customer support has been, click on the **Cases** tab.
- The **People** tab shows all of the people who you have contact with at the company.
- The **Addresses** tab shows a list of all company addresses.
- The **Phone/E-mail** tab shows the different phone and e-mail details for the company.
- The **Company Team** tab shows all the people from your organization who are involved in activities with this company.
- The **Documents** tab shows references to all documents related to this company.
- The **Relationships** tab shows 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.

- The **...** (Ellipses) icon at the end of a row of tabs enables you to change the default tabs you see in different areas of the system. For example, if you rarely work with Opportunities, you can remove this tab from the Company tabs. However, you can easily enable it again if you change your mind.

The tabs available within the context of a Person are similar to those described above, however the information relates specifically to the person.

My CRM Tabs

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

- The **Dashboard** tab shows 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.
- The **Calendar** tab shows all of your planned phone calls, meetings, and day-to-day correspondence.
- The **Contacts** tab allows you to specify contacts in CRM that you want to synchronize with MS Outlook (in "Classic" Outlook Integration or Exchange Integration).
- The **Leads** tab displays a list of unqualified queries about your business.
- The **Outbound Call Lists** tab displays a list of all Outbound call lists that you are working on. This tab is not displayed by default. It can be enabled from the Preferences tab.
- The **Opportunities** tab shows your current sales pipeline.
- The **Forecasts** tab displays a list of your quarterly sales forecasts. This tab is not displayed by default. The System Administrator gives you access to this tab.
- If you want to see a list of open customer service cases assigned to you, click on the **Cases** tab.
- The **Solutions** tab shows a listing of knowledge base items. This tab is not displayed by default. It can be enabled from the Preferences tab, if your System Administrator has given you the rights to access Solutions.
- The **Shared Documents** tab stores corporate documents that you may need quick access to on a daily basis.
- The **Preferences** tab allows you to define system settings specific to your requirements, for example, your time zone, preferred theme, preferred currency, or first page displayed when you log on.
- The **Groups** tab allows you to create and manage groups. Groups functionality allows you to create, modify, and save lists of people, companies, leads, cases, and opportunities.
- **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 e-mail address.
- The **...** (Ellipses) icon at the end of a row of tabs enables you to change the default tabs you see 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.

The tabs available within the context of your Team CRM are similar to those described above, however the information relates to your Team. There are no Forecasts, Outbound Calls, Preferences, Contacts, Dashboard, E-marketing, or Exchange tabs within Team CRM.

Navigating

World Wide Web navigation is dominated by simple, intuitive "point and click" hyperlinks, which move you from one Web page to the next. **Note**: Opening CRM items in a new window or tab using the right-hand mouse button is not supported in the CRM application.

In addition to point-and-click, the following keystrokes and buttons can speed up your navigation.

Tab

The Tab key moves you quickly from field to field when entering or changing data that requires keyboard input. Shift + Tab moves the cursor to the previous field.

Enter

The Enter key is useful when performing searches. If you enter a company name as the search criteria during a search and then press Enter, a list of all companies matching your search criteria is displayed. It is an alternative to selecting the Find action button. The Enter key can also be used to confirm a highlighted selection.

Right Click

You can right-click the mouse on the Find and New menu buttons to activate shortcut pop out lists. You must have the Pop Out List Activation By field set to Click to activate the pop out lists in this way. This field is set in the Preferences tab.

Hover

The Recent List and the Find and New Pop Out Lists can all be activated by "hovering" over the Recent List, Find, or New buttons with the mouse. You must have the Recent List Activation By and Pop Out List Activation By fields set to Hover to activate these lists by hovering. These fields are set in the Preferences tab.

Today's Date

When using Internet Explorer 6, Ctrl + T inserts today's date into a date field. ALT + N will perform the same function in Internet Explorer 7. Alternatively, you can select the Calendar Grid icon next to the Date field. When the date in the Date field is within the current month, today's date is highlighted on the calendar.

Hot Keys

If you like working with your keyboard, a number of hot keys are available to make it quicker and easier for you to perform certain tasks in the system. Different hot keys are available in different CRM screens. You can identify the availability of a hot key when you see that a letter on the action button name is underlined. Selecting Alt plus the letter that is underlined performs that action. For example if the letter T is underlined on the New Task action button on the current screen, selecting Alt and T creates a new task.

Hot keys available when working with CRM in Internet Explorer include:

Alt + A: Creates a new appointment within the Calendar or Communication tab.

Alt + T: Creates a new task within the Calendar or Communication tab.

Alt + E: Creates a new E-mail within the Calendar or Communication tab.

Alt + V: Switches between Calendar and List view within the Calendar or Communication tab.

Alt + C: Lets you exit from some screens.

Alt + S: Saves records.

Most of the short cut keys can be invoked in non-IE browsers as follows:

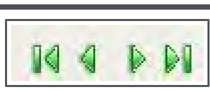
- Firefox - use **Alt + Shift** + *Key*, and then press **Enter**.
- Chrome - use **Alt + Shift** + *Key*
- Safari – use **Alt + Ctrl** + *Key*

Drop-down Lists

Drop-down lists provide predefined lists of selections. They help increase the accuracy of data entry and make filtering and reporting on data much easier.

Drop-down lists can be accessed by selecting the drop-down arrow with the mouse, or ALT +[Down Arrow Key] on the keyboard.

Next and Previous Arrows

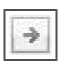
Icon	Description
	The Next and Previous arrows appear when a list of information extends to more than one page. Clicking on the inner left- or right-pointing arrows displays the previous or next page, respectively. The outer

Icon	Description
	arrows take you to the first or last page within a set of pages. For example, if you search for a company without specifying any search criteria, a list of all companies is displayed. This is likely to extend over several pages. You can scroll between the pages using these arrows.

Check Boxes

Check boxes can be toggled on or off by clicking in the check box. An example of a check box is the Private field of a communication (task or appointment). You can also toggle the check box using the Spacebar on the keyboard.

Go Arrows

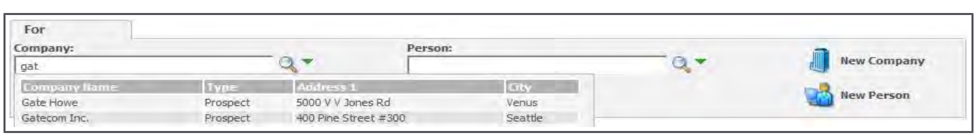
Icon	Description
	The triangular Go allows you to jump to the summary screen of the related record.
	The right-pointing Go arrow allows you jump to another user's My CRM area from the context area of the screen.

Advanced Search Select

A small magnifying glass displayed next to a small down-pointing arrow indicates that the field is an Advanced Search Select field. An example of where it is displayed is the Wave Activity field on the New Lead page.

Icon	Name
	Advanced Search Select field.

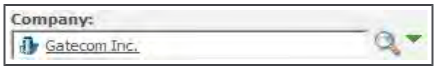
Where the Advanced Search Select icon is present, you can type a few letters, click the magnifying glass icon, and search matches are displayed as hyperlinks underneath the field.



Advanced Search Select results

Click on one of the results and the text box is filled in. If only one item is found, the description is filled in straight away. Alternatively, select the arrow beside the magnifying glass to search using a standard search screen, or select the arrow to clear the current search.

Once you have linked a record, such as a company or person, to the search select field, you can jump to the summary page of the company or person. A single click on the icon, or a double click on the text, launches the Summary page in a new browser window. Ctrl + Click on either the icon or text jumps to the Summary page within the context of the entity.



Note: Only text results are returned when you are running CRM on Microsoft Windows Vista; Advanced Search Select icons are not displayed.

Required Fields

Required fields are flagged with a blue asterisk symbol on all screens in which you enter information. This makes it easier to complete input forms, as you can quickly identify fields that you must complete and fields that you can complete at a later date when you have more information available to do so.

On-screen Coaching

On-screen coaching can be used to display text in a panel at the top of any CRM screen. This panel can be used to provide information for users, for example, explaining what activities can be carried out on a particular screen, or providing useful tips for performing tasks. If on-screen coaching has been activated by your System Administrator, you can:

- Set on-screen coaching display preferences from the Preferences tab. Please refer to Accessing Preferences (page 22-1) for more information.
- You can show or hide the on-screen coaching panel using the Maximize/Minimize button. If you hide on-screen coaching for a screen it will remain hidden when you next log on to CRM.
- You can turn on-screen coaching off with the Turn Off button. Once on-screen coaching has been turned off it will remain turned off when you next log on. You can turn it back on from the Preferences tab.

Please refer to the *System Administrator Guide* for more information on setting up on-screen coaching.

Getting Help

The Help button is available on the right-hand side of the screen. Selecting the Help button opens a new browser window showing a table of contents and a welcome screen, or a page of help relevant to your current context.

Chapter 3: Finding Information

In this chapter you will learn how to:

- Use the Find menu button.
- Find a company.
- Find a person.
- Find an opportunity.
- Find a case.
- Clear a previous search.
- Combine search criteria.
- Use wild cards.
- Use date field search.
- Use numeric field search.
- Use advanced find.
- Use keyword search.
- Use an existing saved search.
- Create a new saved search.
- Update a saved search.
- Delete a saved search.
- Create saved searches for all users.
- Run actions on search lists.
- Sort lists differently.
- Filter lists differently.
- Set a default find page.
- Change the size of search results list.

Basic Search Techniques

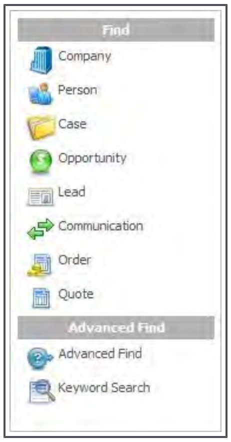
The following basic techniques get you started on carrying out searches in CRM:

Pop Out List or Menu Button with Context Area (page 3-1)
Find Menu and Action Buttons (page 3-2)
Repeating an Earlier Search (page 3-2)
Resetting Search Criteria (page 3-3)

Pop Out List or Menu Button with Context Area

You can initiate a search by:

- Activating the Find Pop Out List. To do this, either right-click or hover over the **Find** menu button, and select the type of search you want to carry out. For example, Person, Case, Sales Opportunity, or Communication.



Find Pop Out List

- Selecting the Find menu button. To do this, select the **Find** menu button, then select the type of search you want to carry out from the context area of the screen.

Find Menu Button and Context Area of Screen

You may find it faster to use the Menu Button method if the context of your search is the same as the last search that you carried out. If the context of your search is different from your last one, you may find the Pop Out List method easier.

Find Menu and Action Buttons

Whichever method you use for initiating a search, the basic sequence is the same:

1. Call up a find screen using the **Find** button on the *left-hand side* of the screen. This is the Find *Menu* button.
2. Type in the search criteria.
3. Retrieve the information using the **Find** button on the *right-hand* side of the screen. This is called the Find *Action* button.

Repeating an Earlier Search

Don’t forget the Recent List. This lists the most recent information you have been working with. It’s a fast way to get back to most frequently "opened folders" of customer information. You can also use the icons on the recent list headings to open the corresponding search page.

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 page, select the **Clear** action button.
2. Specify new search criteria, and click on the **Find** action button. A New Search Results page is displayed.

Searching for a Person

"It's Janet Andrews on the line for you"… Umm, who?

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. Select the **Find** menu button.
2. If you are not in the Person context, select **Person** from the context area of the screen.
3. Type the last name, or part of the last name in the **Last Name** field.
4. Select the **Find** action button on the right-hand side of the screen. A list of people matching your search criteria is displayed.
5. Click on the **hyperlink** of the person you want to drill down on. This opens the 'file' of the selected person and you now have access to all the person’s details.
6. For the fastest overview of recent activities your company has had with the person, select 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.

Quick Look tab

"Janet, how are you? How is your project going?"

Searching for a Company

"My name is Bradshaw, calling from Design Right. We haven't spoken before, I work with Arthur Browne."

It sounds like you probably don't have any information on Mr. Bradshaw yet, but you do on Design Right.

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

1. Right-click on or hover over the **Find** menu button.
2. Select **Company** from the pop out list.
3. Type the company name or part of the company name in the **Company Name** field and select the Find action button on the right-hand side of the screen. A list of all companies matching your search criteria is displayed.
4. Click on the **hyperlink** of the company you want to drill down on. This opens the 'file' of the selected company 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 Design Right.

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

2 People, Page 1 of 1

Person	Title	Phone Full Number	Business E-mail	Territory	Type
Arthur Browne	Sales Manager	1 212 736-4440	arthurb@dri.com	US East	Sales
Reg Barrow		1 212 736-4430	info@dri.com	US East	Operations

Company People tab

"That's right, we've also been working closely with Reg Barrow over the last few weeks."

Finding an Opportunity

"Hi, this is Kieran O'Toole calling from Eurolandia. You quoted me yesterday for a 100 user license deal. Is there someone who can answer a couple of queries I have on it? I've got a reference number here—KOT/SM2"

The fastest way to locate the details associated with the sales opportunity is to find the opportunity. In this example, Kieran has provided a reference number, however you can also search for an opportunity by company name.

To search for an opportunity:

1. Right-click on or hover over the **Find** menu button.
2. Select **Opportunity** from the pop out list.
3. Type in the search criteria, for example, **Customer Ref** and/or the **Company Name** and select the Find action button.
4. Click on the **hyperlink** Status icon of the opportunity. This opens the 'file' of the selected opportunity and you now have access to all the opportunity details.

"I have the details in front of me now, Kieran. Do you want to go ahead with your questions?"

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.

To find a case:

1. Right-click on or hover over the **Find** menu button.
2. Select **Case** from the pop out list.
3. Type in the search criteria, for example, the **RefId** and/or the **Company Name** and select the **Find** action button.
4. Click on the **hyperlink** Status icon of the Case. The Case Summary page is displayed, which gives you 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.

"Arthur, it looks like Graham is still looking into this for you. Let me try his line for you now to get an update."

Combining Search Criteria

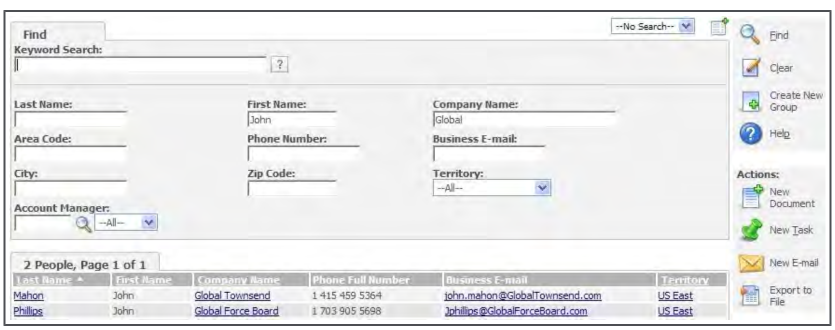
"I've got John from Global on the phone for you."

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 the Search screen. This example shows you how to combine Company Name and Person Name search criteria.

To combine search criteria:

1. Right-click on or hover over the **Find** menu button.
2. Select **Person** from the pop out list.
3. Click on the **Clear** button to clear your last search from this page.
4. Type the person name or part of the name in the **Last Name** field, and the company name in the **Company Name** field.
5. Click on the **Find** action button or press Enter.



Person search results page

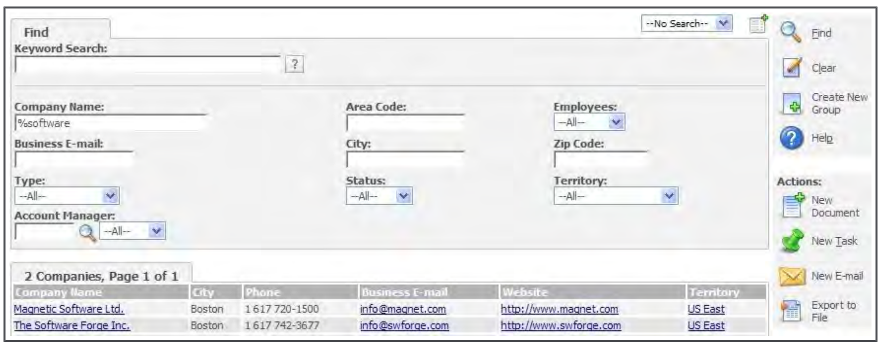
6. Click on the **hyperlink** of the person you want to drill down on.

Wild Card Search

You can use the wild card search on any field on the search screen. This example uses the wild card with the Company Name field. The wild card in CRM is the "%" symbol. The % wild card means 'contains the value'.

To search using a wild card:

- Select the **Find** menu button.
- In the company or person context type, for example, **%software** in the Company Name field and select the **Find** action button. All companies containing the word "software" are returned from this search.



Company search results using a wild card

Date Field Search

A System Administrator can add date search fields to any find screen in CRM.

Some CRM find screens already have a date search capability by default. For example, on the Lead find screen you can search for leads that were created either between two specified dates or within a certain period relative to a specified date.

To search using date fields:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Lead** from the pop out list. The lead Find page is displayed.
3. Click on the **Clear** button to clear your last search from this page.
4. Select **Between** from the Created Date drop-down list.
5. Click on the first **calendar** button and select a date.
6. Click on the second **calendar** button and select a date.
7. Click on the **Find** action button or press Enter. A list of all opportunities matching your search criteria is displayed.

Numeric Field Search

A System Administrator can add numeric search fields to any find screen in CRM. Please refer to "Screen Customization" in the *System Administrator Guide* for details on adding fields to a screen.

For the following example, the Opportunity: Total Quoted Price field was added to the Opportunity find screen. Say you would like to see how many opportunities you currently have with a total quoted price over $10,000.

To search using numeric fields:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Opportunity** from the pop out list. The opportunity Find page is displayed.
3. Click on the **Clear** button to clear your last search from this page.
4. Select **Greater Than** from the Opportunity - Total Quoted Price drop-down list. Select the dollar (**$**) sign from the currency symbol drop-down list and type **10000** in the value field.
5. Click on the **Find** action button or press Enter. A list of all opportunities matching your search criteria is displayed.

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 on the Preview SQL button at any time to review the SQL query behind your search.

If you are 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 16-10) for more information on Mass Updates, and Updating Group Territories (page 16-11) for information on Updating Territories.

For information on saving Advanced Find search criteria, please refer to Creating a New Saved Search (page 3-13). 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 16-6).

Example: Searching for Companies using Advanced Find

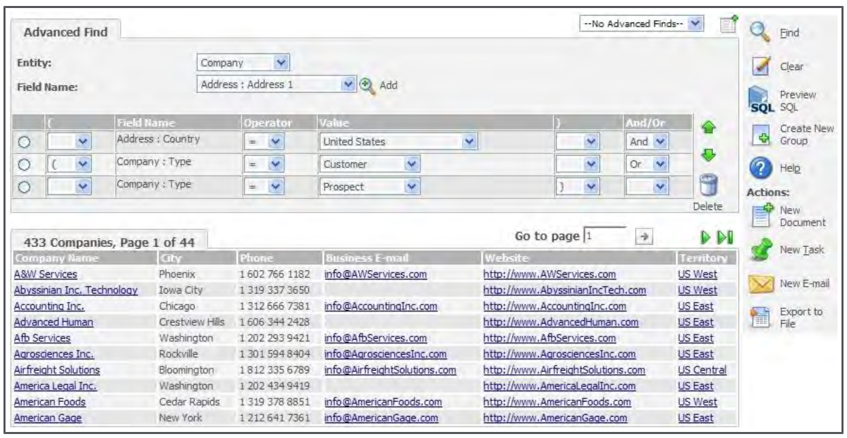
Say you would like to see a list of all customer or prospect companies in the United States.

To search using advanced find:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Advanced Find** from the pop out list. The Advanced Find page is displayed.
3. Click on the **Clear** button to clear your last search from this page.
4. Select **Company** from the Entity drop-down list.
5. Select **Address: Country** from the Field Name drop-down list and click on the Add button.
6. Select **Company: Type** from the Field Name drop-down list and click on the Add button. 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.

7. For the Country field, select the **equals** operator, and select **United States** from the Value drop-down list.
8. Select **And** from the And/Or drop-down list.
9. 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.
10. Select the **equals** operator and select **Customer** from the Value drop-down list.
11. Select **Or** from the And/Or drop-down list.
12. For the second Type field, select the **equals** operator and select **Prospect** from the Value drop-down list.
13. Select the single closing bracket from the) drop-down list.
14. Click on the **Find** action button or press Enter. A list of all companies matching your search criteria is displayed.



Advanced Find search results page

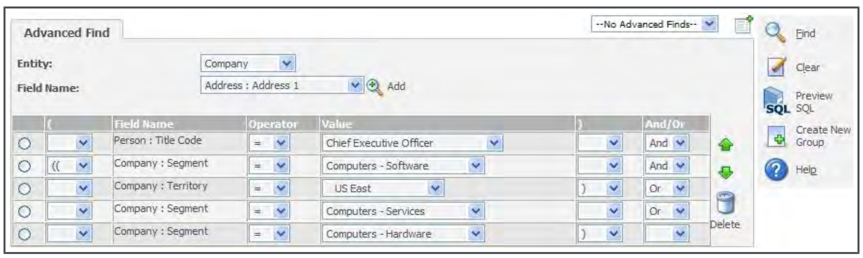
Example: Searching for People using Advanced Find

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. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Advanced Find** from the pop out list. The Advanced Find page is displayed.
3. Click on the **Clear** button to clear your last search from this page.
4. Select **Person** from the Entity drop-down list.
5. Select **Person: Title Code** from the Field Name drop-down list and click on the **Add** button.
6. Select **Company: Segment** from the Field Name drop-down list and click on the **Add** button. Then repeat this action to add a second and a third Company: Segment field.
7. Select **Company: Territory** from the Field Name drop-down list and click on the **Add** button.

8. Click on 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.
9. For the Title Code field, select the **equals operator** and select **Chief Executive Officer** from the Value drop-down list.
10. Select **And** from the And/Or drop-down list.
11. 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.
12. Select **And** from the And/Or drop-down list.
13. 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.
14. Select **Or** from the And/Or drop-down list.
15. For the second Company: Segment field, select the equals operator, and select **Computers - Services** from the Value drop-down list.
16. Select **Or** from the And/Or drop-down list.
17. 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 search criteria

18. Click on the Find action button or press Enter. 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 on the **Find menu button** and select 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 by selecting **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.

Note: By further refining your keyword search using the standard entity find page you are refining the results brought back from CRM by the initial search based on the keyword(s) supplied. If you enter a value into the keyword search box *and* you enter or select a value from one of the standard search fields, then a keyword search is performed first of all based on the keyword search term supplied. Then, based on the keyword search results retrieved from CRM, these results are further filtered by the values entered or selected from the standard search fields such as the Territory drop-down list.

When performing a keyword search, it may sometimes be the case that you know part of the term you wish to search on. For example, you may have part of a company name, or you know that you are 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.
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

Character	Usage
	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 are 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.
+ -	Place + in front of a word that is required in your search or - in front of a word that you wish 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 3-11) 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 are 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. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Keyword Search** from the pop out list. The Keyword Search page is displayed.
3. Type **dav%** and **healthcare** in the What Would You Like To Search For? text field.
4. **Note**: You can click on the question mark button next to the Keyword Search field to view some examples of how to use keyword search.
5. 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.
6. Click on the **Find** button. Your search results are displayed. **Note:** If the records found cannot all be presented in the initial list of results, you can click on 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 are 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. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Keyword Search** from the pop out list.The Keyword Search page is displayed.
3. Type **training** in the What would you like to search for? field.
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 **Select All** check box to search across all main entities. **Note**: If you do not select any check box, no records are returned.
5. Click on the **Find** button. The search results are displayed.

Keyword Search results page

Note: If the records found cannot all be presented in the initial list of results, you can click on 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.

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.

To display a predefined saved search:

- Select the **Find** menu button and select the entity that the saved search is contained within.
- Choose the saved search you want displayed from the Saved Search drop-down. The selected saved search list is displayed.

Creating a New Saved Search

When you perform a search to return Companies, People, Opportunities, Orders, Quotes, Cases, Solutions, Leads, or Communications that match specific search criteria, you may want to save the list and reuse it.

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 also create a group to save search criteria. Please refer to Creating a Group (page 16-2) for more information.

To create a new saved search:

1. Select the **Find** menu button and select an entity from the Find drop-down list, for example Company.
2. Select your required search criteria and click on the **Find** button. Your search results are displayed.
3. Click on the **New Search** button next to the Saved Search drop-down. The Saved Search details box is displayed.
4. Type in the name of the new saved list, for example, San Francisco Companies - 21 - 50 Employees.

Saved Search details box

5. Select **Save**.

Updating a Saved Search

You can make changes to your saved searches using the action buttons located beside the Saved Search drop-down list.

To update a saved search:

1. Select the **Find** menu button and select the entity that the Saved Search is saved under from the Find drop-down list, for example Company.
2. Select the Saved Search you wish to update from the Saved Search drop-down list.
3. Select your new search criteria and click on the **Find** button. Your new search results are displayed.
4. Select the **Update** action button at the top of the screen.
5. When the Saved Search details box is displayed, you can change the name of the saved search if you wish.
6. Select **Save**.

Deleting a Saved Search

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

To delete a saved search:

1. Open the saved search you no longer use by selecting it from the Saved Search drop-down list at the top of the Find screen it is saved in.
2. Select the **Delete** action button beside the Saved Search drop-down list.

Creating Saved Searches for all Users

If you are an Info Manager, you can create saved searches that are available to all users in the system.

To create a saved search that is available to all users:

1. Select the **Find** menu button and select an entity from the Find drop-down list, for example Company.
2. Select your required search criteria and click on the **Find** button. Your search results are displayed.
3. Click on the **New Search** button next to the Saved Search drop-down. The Saved Search details box is displayed.
4. Type in the name of the new saved list, for example, San Francisco Companies - 21 - 50 Employees.
5. Select the **Available To All Users** check box and select **Save**.

Running Actions on Search Lists

You can perform a number of 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:

- **Start Mail Merge.** You can create a merged document for all contacts contained in your list.
- **New Task.** You can create a new task with the same details for each of the contacts on your list.

If you have the appropriate rights, the following two actions are also available:

- **New E-mail.** You can create an e-mail with merge fields, which can be sent to all of the contacts on your list.
- **Export to File.** You can export your list of contacts, and contact details, to a spreadsheet or to a text file.

To run an action on a search list:

- Return a search list by either performing a standard search or selecting a saved search from the Saved Search drop-down list at the top of the screen.
- Select one of the Action buttons on the bottom, right-hand side of the screen. The action you selected is performed.

Counting

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. Hovering over the right-pointing arrow indicates that the next page shows records 11-20 out of a total of 22.

Filtering

You can easily change the way lists of information are displayed. This example shows you how to change the way you view the list of communications within the context of a company can produce a long list of historical and current activities.

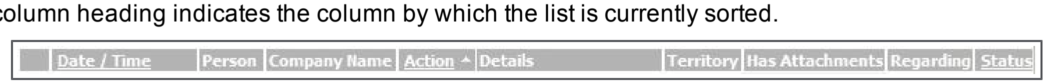
To narrow down this list to show only Pending communications:

1. Within the context of a company, click on the **Communications** tab.
2. To view only the pending communications, select **Pending** from the Status list on the right-hand side of the page.
3. Click on the **Filter** button. The list of communications is restricted to show only those with a status of Pending. This filter applies to all Company Communications lists until changed or until the user logs out.

Sorting

The sort order of any list can be changed where a list column heading is underlined. This example shows you how to change the sort order of the Calendar list from Date/Time to Action type.

1. Select **My CRM**, and then the **Calendar** tab.
2. Make sure you are in the List View. If you are in Calendar View, switch to **List View** by clicking the List View button.
3. Click on 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.



Communication column heading

4. To change the sort order back to Date/Time, click on the **Date/Time** column.

This example changes the sort order of your Calendar list from ascending Date/Time to descending Date/Time.

1. Select the **My CRM** button.
2. Click on the **Date/Time** column heading. The Calendar list is now sorted by Date/Time with the most recent pending communication first.
3. To change the sort order back to ascending, click on the **Date/Time** column. The Calendar list reverts back to the original sort order.

Setting a Default Find Page

You can specify the Find screen that you want to appear at the beginning of a session. However, 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.

To specify a default Find page:

1. From within **My CRM** | **Preferences** tab, select the **Change** action button.
2. Select the **Find Screen** you want to set as the default from the **My Default Find Screen** field, and select **Save**.

Setting the Size of the Search Results List

To specify the default maximum length of lists and grids on any page:

1. From within **My CRM** | **Preferences** tab, select the **Change** action button.
2. Select the default maximum length from the **Grid Size** field, and select Save.

Chapter 4: Adding Customer Information

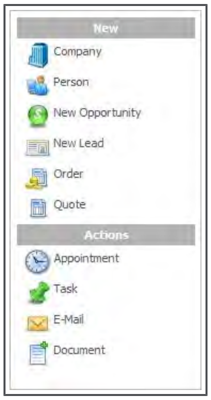
In this chapter you will learn how to:

- Use the New menu button.
- Understand the company fields.
- Understand the person fields.
- Understand the address fields.
- Understand the phone and e-mail fields.
- Understand the person phone details fields.
- Understand the person e-mail fields.
- Understand how territories work.
- Add a new company, person, and address.
- Add a person to an existing company.
- Add an address to an existing company.
- Maintain address links.
- Add a person unlinked to a company.
- Interpret validation errors.
- Change company details.
- Change person details.
- Change address details.
- Update a phone number.
- Assign a different address to a person than the company address.
- Add a private address to a person.
- Add a company that has multiple sites.
- View information in the Relationships tab.
- Add a new relationship.
- Understand the relationship fields.
- Delete a relationship.
- Assign an in-house project team to a company.
- Add notes to a company or a person.
- Editing Company Notes.
- Merge two companies.
- Merge two people.
- Assign an unlinked person to a company.
- Delete company or person records.

Pop Out List or Menu Button with Context Area

You can add new information by:

- Activating the New Pop Out List. To do this, either right-click on or hover over the **New** menu button, and select the type of information you want to add. For example, Person, Case, or Opportunity.



New Pop Out List

- Selecting the New menu button. To do this, select the **New** menu button, then select the type of information you want to add from the context area of the screen.

New Menu Button and Context Area of Screen

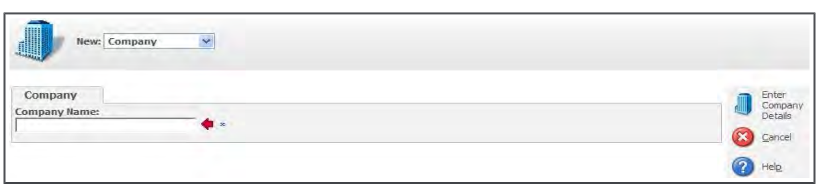
- The action buttons on the right-hand side of the screen can also be used to add information. These are available when you already have a folder of information open.

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

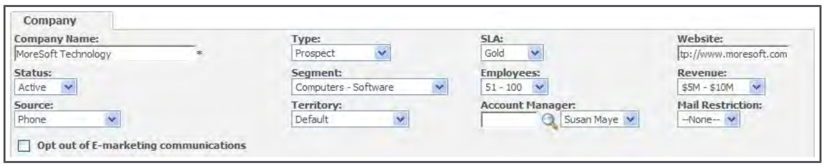
To add a new company:

1. Right-click on or hover over the **New** menu button.
2. Select **Company** from the pop out list. The Company duplicate find page is displayed.



Company duplicate find page

3. Type the first few letters of the company name, and select the **Enter Company Details** button. The system searches for possible duplicate company names. For more information on Deduplication, please refer to Preventing Duplicate Entries (page 4-17). If no potential duplicate company is found, the New Company page is displayed. The New Company page allows you to add all the company details and a principal contact and address. You can add multiple people and addresses to a company. This is described in the next sections.
4. Enter the details in the **Company** panel. Your System Administrator determines the minimum details that need to be entered.

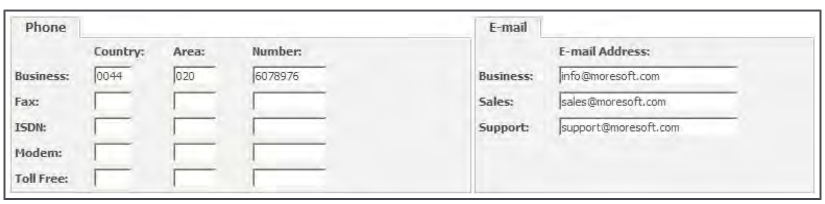


Company panel

5. Enter the details in the **Address** panel.

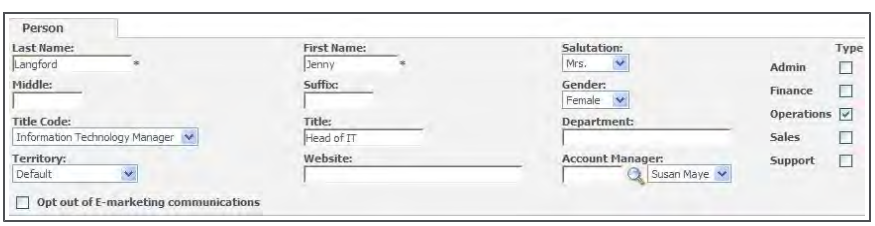
Address panel

6. Enter the details in the **Phone** and **E-mail** panels.



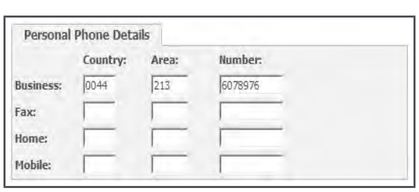
Phone and E-mail panels

7. Enter the details in the **Person** panel.



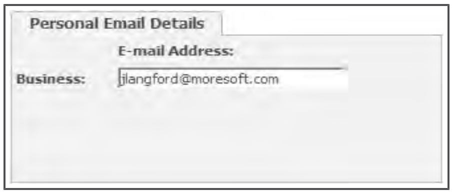
Person panel

8. Enter the details in the **Personal Phone Details** panel. The table below explains the standard fields.



Person Phone Details panel

9. Enter the details in the **Personal E-mail Details** panel. The table below explains the standard fields.



Personal E-mail Details panel

10. Click on the **Save** button. You may need to scroll back to the top of the page to access the buttons.

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 18-1). 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 refer to Territory Management (page 4-7).
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 e-mail 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 e-mails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing e-mail).

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—one or more of these can be checked.

Phone and E-mail 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.

Field	Description
Toll Free	Toll free number.
Info	General information e-mail address.
Sales	Sales e-mail address.
Support	Support e-mail 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	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 refer to Territory Management (page 4-7).
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 e-mail 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 e-mails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing e-mail).

Person Phone Details Fields

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

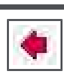
Person E-mail Fields

Field	Description
Business	Person's work e-mail address.
Private	Person’s private e-mail address.

Validation Errors

When you add a record and click on the Save button, the page may be displayed with a message "Validation Errors - Please correct highlighted entries". When this is the case, look for any fields with a ? or an X displayed to the right of them.

Fill in the required fields, correct the entries in the wrong format, and select the Save button.

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

Each of the main types of data in CRM (Company, People, Communications, Leads,and Opportunities, and Cases) have a field called Territory.

Your System Administrator can set up different hierarchical territories—geographically, by product, or by another criteria—which reflect your organization's data security needs. Each user is assigned a "home" territory, and security access rights are applied across the territories.

Territories

For example, your organization has sales teams based in Europe, Asia, and the USA. It is a requirement that the sales people can view all companies, but they can only insert and change the companies in their own "home" territory or hierarchically subordinated to their home territory.

When inserting new data, you can select a territory to assign the record to from the Territory list. The territories available to you in the list are defined by your System Administrator. If you do not select a territory, the record is automatically assigned a territory according to the territory security management set up by your System Administrator and a set of system rules.

If no territories are defined by your System Administrator, you can ignore this field. All records are then automatically assigned to the highest level territory called Worldwide.

The Territory field appears in most lists and filter boxes within CRM. If your implementation makes use of territories, all areas of the system (including Reporting and Groups) are affected by it.

For example, if you do not have rights to view data in the USA sales territory, no USA sales territory data is displayed on a company list report run by you.

Changing Company Details

1. Open the company you want to make changes to, and click on the **Summary** tab.
2. Select the **Change** button.
3. Make the changes to the company information.
4. Select the **Save** button.

Changing Company Address Details

One of your customers has moved to a new location and you need to update the address and phone details.

1. Open the company you want to make changes to, and click on the **Summary** tab.
2. Select the **Addresses** tab. This displays a list of all company addresses. The **Link Status** icon shows if the company address you are about to change is linked to existing contacts.
3. Click on the **hyperlink** of the address you want to change.
4. Type the new address. Note that the **Set As Default Address For Company** check box should remain selected if this address is the new principal address for the company. Leaving this check box selected also means that this is the default address for any new people who are added to the company.

Set As Default Address For Company check box

5. Select the **Save** button. Note that any people linked to this address are also affected by the change. Click on the **Link Status** icon to view the linked contacts.

Changing Person Details

What do you do if one of the people who works at the company you have been dealing with moves department and receives a promotion?

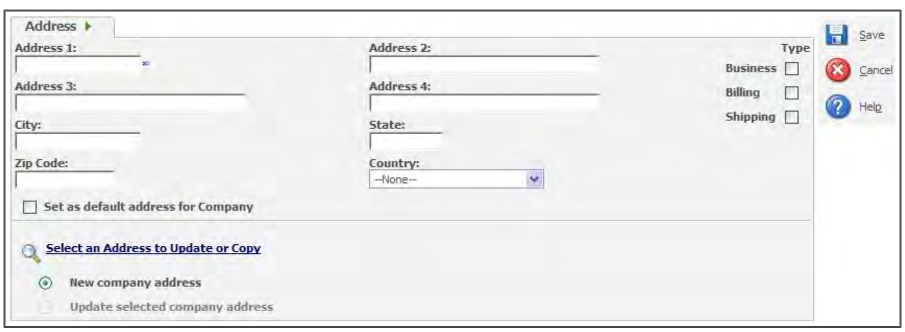
Update the information as soon as you receive it. Someone else in your organization may be sending out a mail shot to your contact, so it is important to get the new title in the system.

To change the details of the person:

1. Open the person context of the person you want to make changes to, and click on the **Summary** tab.
2. Select the **Change** button.
3. Make the changes to the person's details and select the **Save** button. Note that the **Set As Default** check box should remain selected if this person is still the principal 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 on the **Addresses** tab.
2. Select the **New Address** button.



Address panel

3. Enter the details of the new address, or click on the **Select An Address To Update Or Copy** icon to base the new address on an existing address. The Set As Default check box can be selected to make this address the principal company address.
4. Select the **Save** button.

Note: A new address added in the context of a company is linked to the company, but the Link Status shows as single-linked until the address is linked to one or more contact people. A new address added in the context of a person is linked to the person, but the Link Status 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 on the **People** tab.
2. Select the **New Person** button. The Person duplicate find page is displayed.

3. Type the first few letters of the Person's **last name**, and select the **Enter Person Details** button. The system searches for possible duplicate person names in the system. For more information, please refer to Preventing Duplicate Entries (page 4-17). If no potential duplicate person is found, the New Person page is displayed.
4. Enter the details in the **Person** panel.
5. Enter the details in the **Address** panel. The address displayed is the default address for the company. If the person is based at a different location you can type over the default address. Use the radio buttons on the right-hand side of the address panel to determine if the new address should only appear within the context of this person (select **Person Address Only**) or if it should also be available at the company level (select **Person And Company Address**). The **Select Address From List** icon allows you to choose from the list of existing company addresses to link this person to. This then provides you with a further radio button allowing you to update the company address from your current location. The **Address Type** can be specified as Business and/or Home by selecting the check boxes.

Address panel

6. Enter the details on the **Phone** and **E-mail** panels. The details default to the company phone and e-mail, but these can be overwritten with the person's direct contact details.
7. Select the **Save** button.

Maintaining Address Links

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 on the hyperlink of the company name.
2. Select 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 are 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 on 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 a list of 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 will automatically be 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.

Address Links page

5. Select the **Pencil** icon next to 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.
   - **Note**: 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 have made an address the default address for a company or person, you cannot remove the Default Address selection without removing the Address Link selection first.
7. Select **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.

User Requirement: Non-integration systems only

Assigning a Different Address to a Person

You may want to assign an address to a person that is different from the Company's usual address. To do this:

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

Adding a Private Address to a Person

You may want to assign a private address to a person. To do this:

1. Find the person whose details you want to change, and open the Summary page for the person.
2. Click on the **Addresses** tab and select **New Address**.
3. Fill in the address details and ensure that you select the **Home** check box on the right-hand side of the screen.
4. Click on the **Save** button.

Changing Phone/E-mail 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. Select the **Phone/E-mail** tab.
3. Enter the change on the **Phone** panel and click on **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/E-mail** tab.
3. Enter the change on the **Phone** panel and click on **Save**.

Adding a Company that has Multiple Sites

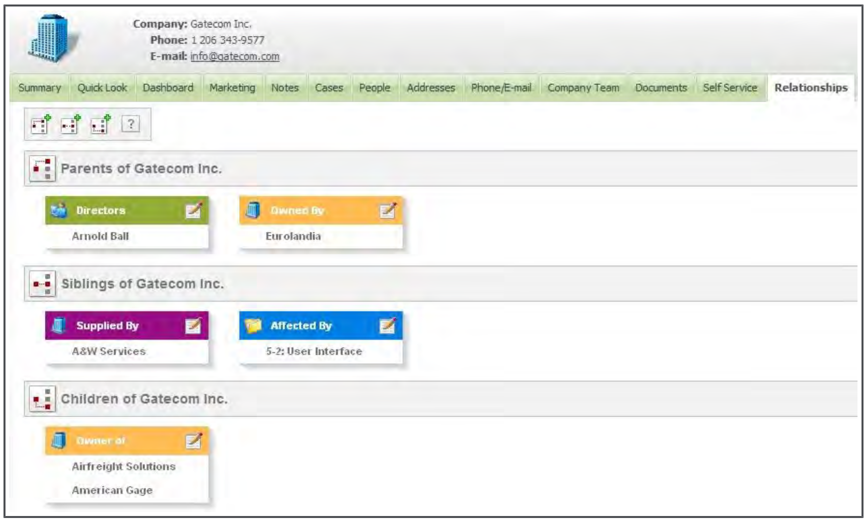
If you are creating a new company that has more than one geographical site, you should create the company in the normal way and then add the additional address with the New Address button on the Addresses tab.

Alternatively, you may wish to talk to your System Administrator about customizing the Company and Address fields to suit you needs.

Working with 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.



Company Relationships tab

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.

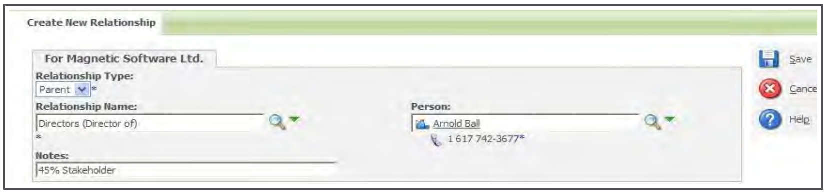
Your System Administrator is responsible for setting up relationship types available in the system. If you need new or different relationship types to meet your business needs, please contact your System Administrator.

Adding a New Relationship

Arnold Ball has recently joined the board of directors of Magnetic Software. With a 45% stake in the company, he holds significant influence over Magnetic that you want to track.

To add a new company relationship:

1. Search for the **Company**. For example, Magnetic Software.
2. Select the **Relationships** tab in the context of the company.
3. Select the icon representing the type of relationship you want to add, for example, **New Parent**. The Create New Relationship page is displayed.



Create New Relationship page

4. Fill in the fields for the new relationship.
5. Select **Save**.

   The new relationship is displayed on the Relationships tab. All related information is hyperlinked.

   For example, clicking on Arnold Ball opens Arnold Ball as the current context. If you check the Relationships tab in the context of Arnold Ball, you can see all the companies he is a director of, including Magnetic Software and Gatecom.

You can run reports and create new reports on the information in the Relationships tab. Please refer to Running Reports (page 10-1) and Introduction to Writing Reports (page 23-1) for more information on running and writing reports. You can also display relationship information on your Dashboard. Please see Classic Dashboard (page 21-1) for more information.

Relationship Fields

Field	Description
Relationship Type	Select from Parent, Child or Sibling. Parent or Child relationships normally represent hierarchical relationships or relationship where some kind of "ownership" is involved. Sibling relationships normally represent "influencing" or "affecting" relationships. This is only a guide. There is flexibility to allow your System Administrator to set up relationship types to suit your specific business needs.
Relationship Name	Select from a list of relationships defined by your System Administrator. For example, 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 select the magnifying glass icon.

Field	Description
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 on the Maintain Relationship pencil icon and clicking on the hyperlink of the note you want to change.

Deleting a Relationship

Arnold Ball is no longer a director of Magnetic Software.

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, add a note to the Notes tab in the context of the person, and/or in the context of the company.

To delete a relationship:

1. Find the Company (or other entity) where the relationship is displayed.
2. Select the **Relationships** tab.
3. Click on the **Maintain Relationship** pencil icon next to the relationship heading. A list of all people who are, for example, Directors of the current company, is displayed.
4. Select the **Remove Relationship** check box next to the relationships you want to delete.
5. Select the **Delete Selected Relationships** button. A confirmation dialog box is displayed.
6. Click OK to continue.

The Relationships tab is displayed. The deleted relationship is no longer displayed on the Relationships tab in the current context or in the context of the reciprocal Relationships tab.

Adding a Note

You can add notes to Companies, People, Cases, Solutions, Sales Opportunities, and Leads. To add a free text note to a Company, for example:

1. Open the company you want to make changes to, and click on the **Notes** tab.
2. Select the **New Note** button.
3. Type the text of the note.
4. Select the **Save** button.

You can add an unlimited number of text notes to the system, and attach them directly to the records where they are most relevant. Notes can be attached to: Companies, People, Communications, Leads, Sales opportunities, Customer service cases.

Editing a Company or Person Note

To edit a free text note to a company, for example:

1. Open the company you want to make changes to, and click on the **Notes** tab.
2. Click on the hyperlink of the note. The Notes input page is displayed.
3. Type the changes to the note.
4. Select the **Save** button.

Building a Company Team

The Company Team tab within the context of a company gives you an overview of who is involved from your organization in the management of large accounts. Your System Administrator must give you access to the Company Team tab. The System Administrator 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 on the **Company Team** tab.
2. Select the **Add Team Member** button.
3. Select the User from your organization from the list and add a description of their role.
4. Select the **Save** button.

Adding a Person without a Company Link

You can add a person to the system independent of any 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 are not in the context of an existing company. If you are, click on the **My CRM** button. This takes you out of an existing company "folder" with one click.
2. Right-click on or hover over the **New** menu button.
3. Select **Person** from the pop out list. The Person duplicate find page is displayed.
4. Type the first few letters of the **person's name**, and select the **Enter Person Details** button. The system searches for possible duplicate person names. For more information, please refer to Preventing Duplicate Entries (page 4-17). If no potential duplicate person is found, the New Person page is displayed.
5. Leave the **For** panel blank if you do not want to associate this person with a company. If you do want to link the person to a company, search for the company from the For panel.
6. Enter the details in the **Person** panel.
7. Enter the details in the **Address** panel.
8. Enter the details in the **Phone** and **E-mail** panel.
9. Select the **Save** button. The Summary page for the new person is displayed.

Person Summary page

You can see that there is no link to a company in the context area of the screen. All the tabs relate to the person. You can add notes, addresses, phone, and e-mail information for the person in the same way as you do for a company or for a person within a company.

Reassigning a Person to a Company

If a person who you have been tracking as an individual (that is, the person is not related to a company in any way) later moves to join a specific company, you can assign them to a company and move all the communications, opportunities, and cases linked to them across to the company.

Note: Your System Administrator needs to give you rights to do this.

To reassign a person to a company:

1. **Find** the person you want to reassign.
2. Click on the **hyperlink** of their name to display the Summary page.
3. Select the **Change** button. The Summary page is displayed in edit mode, with a new button, Merge Person.
4. Select the **Merge Person** button. This displays an additional panel, Assign Company.
5. Search for and select the company that you want to assign the person to.
6. Select the **Save** button.

Preventing Duplicate Entries

Deduplication is enabled by default in the system, with the match rules outlined below. The deduplication screens and the match rules can be customized by your System Administrator. Checking for duplicates then automatically becomes part of the process for adding a new company or person into the system.

To check for duplicate entries before adding a new company:

1. Right-click on or hover over the **New** menu button.
2. Select **Company** from the pop out list. The Company duplicate find page is displayed.
3. Type the **company name** and select the **Enter Company Details** button. If the information you typed matches a current company record in the system (according to the match rules defined by your System Administrator), a list of detected duplicates is displayed. The default match rule on a company is where the Company Name "contains" the entry you have typed—that is, if you type **Right** as the company name, "Design Right" is detected as a possible duplicate.
   From the list of detected duplicates you can:

- Click on the hyperlink of an existing company.
- Return to the Company duplicate find page by selecting the Back To Company Entry button.
- Proceed to add a new company by selecting the Ignore Warning And Enter Company button.

4. To proceed to add a new company anyway, select the **Ignore Warning And Enter Company** button.
5. The **New Company** page is displayed including the details entered on the Company duplicate find page.
6. Enter the **company details** and select the **Save** button.

The new company is added into the system and the Company Summary page of the new company is displayed.

To check for duplicate people who are unrelated to a company or people linked to companies, follow the same steps as described above, but select the New | Person option from the pop out list.

The default match rule on a person is where the Last Name "contains" the entry you typed—that is, if you type the person name as "Smith", both "Smith" and "Blacksmith" are detected as possible duplicates.

Note: The system also checks for duplicates if you change any of the fields 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

To merge two companies, first decide which company is the "Source" company and which is the "Destination" company. When the companies are merged the source company is deleted, and the information associated with it—for example, people, communications, opportunities, and cases—is copied over to the "Destination" company. Relationships set up via the Relationships tab are not merged.

Note: Your System Administrator needs to give you Delete rights to use this feature. If you do not have Delete rights and merge two companies, the old company will remain but all of the data will be merged.

To merge two companies:

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 on the **hyperlink** of the company name.
3. Select the **Change** button and then the **Merge Company** button. This displays an additional panel, Merge Company.

Merge Company panel

4. Use the **Search Select** buttons to select the source company.
5. Select the **Save** button. The destination Company Summary page is displayed. A review of the tabs shows that people, communications, opportunities, and cases of the source company have been copied across to the merged company. In addition, the source company is deleted.

Note: The source company’s addresses get 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. Please refer to Maintaining Address Links (page 4-10) for more information.

Merging Duplicate People

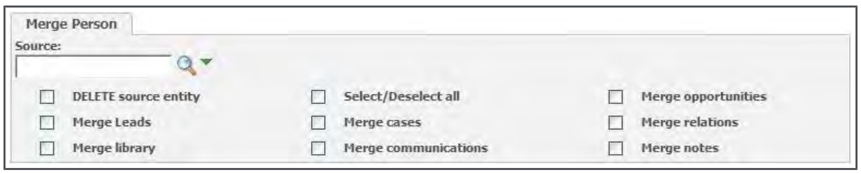
Your System Administrator needs to give you rights to use this feature. The following table explains the check boxes.

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	Toggles the selection of all the check boxes. If all check boxes are selected, then the source person record is deleted and the associated data is merged with the "Destination" person.
Merge Opportunities	Selecting this check box means that the opportunities associated with the source person are **merged** over to the destination person. For example, opportunities associated with the duplicate source person, "Clemence Sticky" will be associated with the destination person "Clemence Stickings" after the merge.
Merge Leads	Selecting this check box means that the leads associated with the source person are merged over to the destination person.
Merge Cases	Selecting this check box means that the cases associated with the source person are merged over to the destination person.
Merge Relations	Selecting this check box means that the linked information set up by your System Administrator and associated with the source person is merged over to the destination person.
Merge Library	Selecting this check box means that the documents associated with the source person are merged over to the destination person.
Merge Communications	Selecting this check box means that the communications associated with the source person are merged over to the destination person.

Check box	Description
Merge Notes	Selecting this check box means that the notes associated with the source person are merged over to the destination person.

To merge duplicate person entries:

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 on the **hyperlink** of the person's name.
3. Select the **Change** button and then select the **Merge Person** button. This displays an additional panel, Merge Person.



Merge Person panel

4. Click on the **magnifying glass**, search for and select the source person.
5. Check the **boxes** according to the information that you wish to merge. Unlike the company merge, you also have the option to keep the source person.
6. Select the **Save** button. 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 the Delete Source Entity check box.

Deleting Company or Person Records

Unless you are a System Administrator or a power user, it is unlikely that you will have the ability to delete company or person records. Instead you should:

- Ask your System Administrator about giving you the rights to merge person and company records.

Or

- Set the status of the company to Inactive. To do this, open the Company **Summary** page, select the **Change** action button, select **Inactive** from the Status list and click on **Save**. A Status field can also be added to the Person Summary page by your System Administrator, if your organization decides to use a similar method to indicate a person is no longer used.

If your profile allows you to delete company or person records, a Delete action button is available on the Person or Company Summary page.

To delete a Company or Person:

1. Find and open the company or person you want to delete.
2. From the Summary page, click on the **Delete** button and then on the **Confirm Delete** button. The person or company record is deleted from the system.

Chapter 5: Appointments and Tasks

In this chapter you will learn how to:

- **Create a task**.
- **Create an appointment**.
- **Schedule a callback**.
- **Understand the Communication fields and icons**.
- **Check my own calendar**.
- **Check a colleague's calendar**.
- **Review the contact history with a person or company**.
- **Review notifications**.
- **Change the status of a task or an appointment**.
- **Find a communication**.
- **Add attachments to tasks**.
- **Invite external attendees to a meeting**.
- **Create a recurring task or appointment**.
- **Synchronize my CRM and Outlook calendars**.
- **See my colleague's availability for an appointment**.
- **Deleting a communication**.

Creating a Task

To create a task:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Person**. The person Find page is displayed
3. Type the **name** of the person and select the **Find** action button. A list of people matching your search criteria is displayed.
4. Click on the **hyperlink** of the person you want to schedule the task with. This displays the Person Summary page.
5. Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
6. Select **Task**. The New Task page is displayed. **Note:** You can also select the Task button directly from the New Pop Out list or from My CRM | Calendar. The difference is that you then need to find the person you are scheduling the task with, using the Regarding panel. You can also schedule communications that are not linked to a person or company.
7. Enter the details on the page. **Note**: The time and date fields under **Due Date/Time** are automatically populated with the current date and a time 30 minutes into the future.
8. Select the **Save** button.

Creating an Appointment

To create a new appointment:

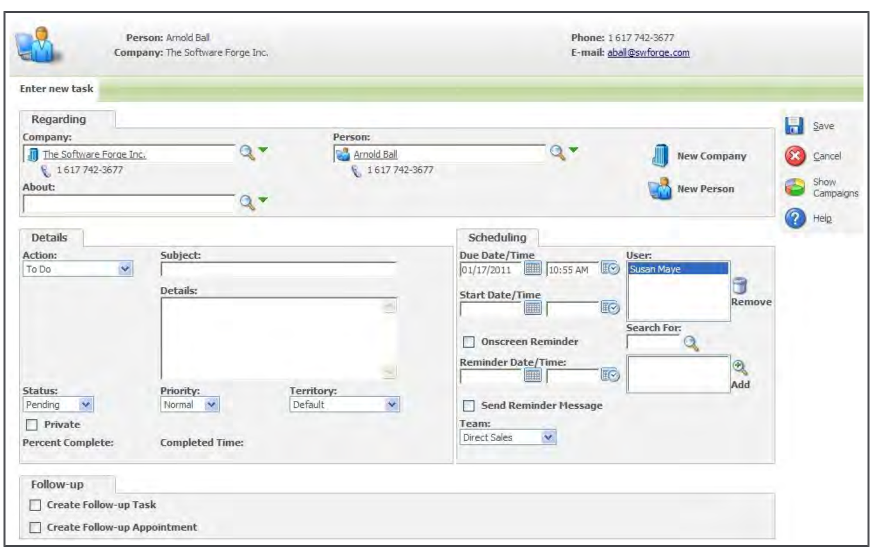
1. From the **My CRM** | **Calendar** tab, select the **New Appointment** button. Alternatively, right-click or hover over the **New** menu button and select Appointment.
2. Fill in the details of the appointment. The **Regarding** panel allows you to link the appointment to an existing company and person.
3. Ensure that your name is selected from the list of users, and select **Save**.

Scheduling a Callback

Following an internal meeting, you are 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.

To create a callback:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Person**. The person Find page is displayed.
3. Type the name of the person and select the **Find** action button. A list of people matching your search criteria is displayed.
4. Click on the hyperlink of the person you want to schedule the callback with. This displays the Person Summary page.
5. Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
6. Select **Task**. The New Task page is displayed. **Note:** You can also select the Task button directly from the New Pop Out list or from My CRM | Calendar. The difference is that you then need to find the person you are scheduling the communication with, using the Regarding panel.



New Task page

7. Enter the details on the page.
8. Select the **Save** button.

Communication Fields

The table below explains the fields on the Regarding panel.

Field	Description
Company	The company you are communicating with. If linked, you can jump to the summary screen of the related company by clicking on the Company icon or double clicking on the text in this field.
Person	The person you are communicating with. If linked, you can jump to the summary screen of the related person by clicking on the Person icon or double clicking on the text in this field.
About	The opportunity or case that the communication relates to. If linked, you can jump to the summary screen of the related opportunity or case by clicking on the Opportunity or Case icon or double clicking on the text in this field.

The table below explains the fields on the Details panel.

Field	Description
Action	The type of task, for example, Phone Out or E-mail In.
Subject	Subject of the appointment or task.
Location	Appointments only. Location of the appointment. Type in the location, or leave blank. If a Resource type user is added to the appointment, for example, London Meeting Room, then this resource is automatically added to the Location field. If you have already typed some text into this field, the resource user gets added on to the end after a semi-colon.
Details	A summary of the task.
Status	Status of the communication. For example, Planned, Complete, or Cancelled.
Priority	Priority of the task. For example, High, Medium, or Low.
Territory	Security territory of the communication. Please refer to Territory Management (page 4-7) for more information.

Field	Description
Private	This check box can be selected if the task should only be viewed by the assigned user.
Created By	This field is displayed once the appointment or task is saved. It shows the user who created the appointment or task.
Created Date	This field is displayed once the appointment or task is saved. It shows the date the appointment or task was created.
Percent Complete	This field records the amount of the task that is completed in percentage terms. For tasks managed exclusively in CRM it displays either 100% when the task is set to Complete, or 0% if the task set to Cancelled. For tasks synchronized from Outlook, the percentage value from Outlook is displayed (any value from 0% to 100%).
Completed Time	This field will record the time and date at which a task or appointment was completed. These rules for Completed Time apply when inserting or updating a communication (task or appointment): If the status is not complete then the completed time will be set to blank. If the status is complete then the completed time must be filled in. If it is not filled in (or set to blank) by the user then it is set to current time, otherwise it is set to what the user entered.
Organizer	If **Exchange Integration** is enabled, this field is only displayed for appointments. It is editable when creating an appointment in CRM. It defaults to the user creating the appointment, but can be changed. It is a mandatory field. If Exchange Integration is **not** enabled, this field is read-only, and is displayed once the appointment or task is saved. It shows name of the person organizing the appointment or task. If the appointment or task is created in CRM, the field displays the same name as the Created By field. If the appointment is created in Classic Outlook Integration, and then synchronized with CRM, this field shows the name of the meeting organizer. If the Classic Outlook meeting organizer is not a CRM user, then their e-mail address is displayed in the Organizer field.

The table below explains the fields on the Scheduling panel.

Field	Description
Due Date/Time	Date the task must be completed by. This is the Date/Time that appears in all CRM Communications lists and determines where the task appears in the

Field	Description
	Tasks panel of your Calendar View. When you add the Due Date/Time, the Onscreen Reminder field is enabled, and the Reminder Date/Time set to the same time as the Due Date/Time.
User	The person who is responsible for executing the task. If your CRM system has less than ten users, this field is displayed as a single list. You can select, or multi-select using the mouse and holding the CTRL key. With more than ten users, a search is built in to help you find the users. In the Search For field, type the first letter, or a few letters of the first or last name, for example, w. The first user, whose first name begins with the letter "w", is highlighted in the list of matching users. This list also displays all users containing the letter "w". Highlight one user, or multiple users by holding down the CTRL key, and click on the Add button to assign them to the task or meeting. If there are 10 users or less in the system, all of the users will be listed in the User section. Select the required users from the list provided to assign them to the task or meeting. **Note**: When you add more than one user to a task, you are creating multiple tasks.
Start Date/Time	Date/Time the task is "active" from. Used in MS Outlook if you are 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. Check this box to get an on-screen 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, you can select this check box to receive the reminder in different formats depending on the priority of the communication. The different formats and priorities are set up within the Preferences tab. Please refer to

Field	Description
	Preferences (page 22-1) for more information.
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.
End Time	End date and time of the communication. Defaults to half an hour after the Date/Time.
All Day Event	Select to show the appointment is an all day event. Once selected, the Date / Time is set to 00:00 and is read-only. The End Time date is set to the same day, and the End Time is set to 11:59 pm (23:59) - both read-only. 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	Select this button if you want to set the current appointment up as part of a recurring pattern of appointments. For example, every Monday at 10.00 AM to meet with the Professional Services team.

The Meeting Planner panel is displayed on all Appointments (communications where the Action field is set to Meeting). The Meeting Planner panel is not displayed for Recurring Appointments or Tasks.

The table below explains the fields on the Follow-up panel.

Field	Description
Create Follow-up Task	The check box can be checked to generate a new task based on the current information, immediately after saving the current task.
Create Follow-up Appointment	The check box can be checked to generate a new meeting based on the current information, immediately after saving the current task. The Create Follow-up Task and Appointment check

Field	Description
	boxes cannot be checked at the same time
Create Follow-up Opportunity	The check box can be checked to generate a new opportunity based on the current information. Note that it is only displayed when editing existing communications.
Send SMS Message Immediately	If SMS messaging is enabled by your System Administrator, selecting this option immediately notifies the user(s) assigned to the task or meeting.

Selecting the Show Campaigns button displays a new panel called Campaigns.

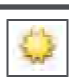
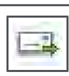
The table below explains the fields on the Campaigns panel.

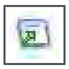
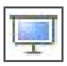
Field	Description
Wave Activity	Click on the magnifying glass to search for a Campaign Wave Activity to link the communication to. Once you have selected the Wave Activity a further field, called Response Type, is displayed. If the communication was scheduled within the context of a Wave Activity, for example, to register a mail shot going out, the Wave Activity is read-only.
Response Type	List of Response Types related to the Wave Activity.

Communications generated within the context of a campaign are automatically linked to a wave activity. When edited, the Campaigns panel is immediately displayed.

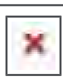
For more information, please refer to Campaign Management (page 17-1).

The table below shows the standard Action type icons.

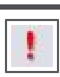
Icon	Action
	Vacation
	Phone Out
	Phone In
	Letter Out

Icon	Action
	Letter In
	E-mail Out
	E-mail In
	Fax Out
	Fax In
	Meeting
	Demo
	To Do

The table below shows the standard Status icons.

Icon	Status
	Pending
	In Progress
	Complete
	Cancelled

The table below shows the standard Priority icons.

Icon	Priority
	High
	Normal
	Low

Scheduling Unlinked Communications

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

From the **My CRM | Calendar** tab:

1. Select the **New Task** button. The Enter New Task page is displayed.
2. Fill in the details leaving the Regarding panel blank.
3. Ensure that your name is selected from the list of users.
4. Select the **Save** button.

Scheduling a Quick Appointment or Task

"You need to get to the bank before midday!"

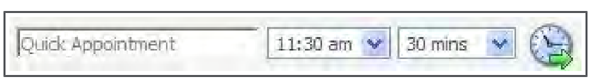
"Will you remember to call Roger back after lunch?"

Some appointments or tasks do not have to be linked to person or company records in CRM. Neither do they need to have much detail attached to them—they can just be like Post-It notes.

You can easily capture these in CRM using the Quick Appointment and Quick Task buttons in the My CRM | Calendar tab.

To create a Quick Appointment:

1. Select the **Calendar** tab within My CRM. Make sure you are in Calendar View. If you are in List View, select the Calendar View button.
2. Type a few key words in the **Quick Appointment** field at the top of the Calendar panel.



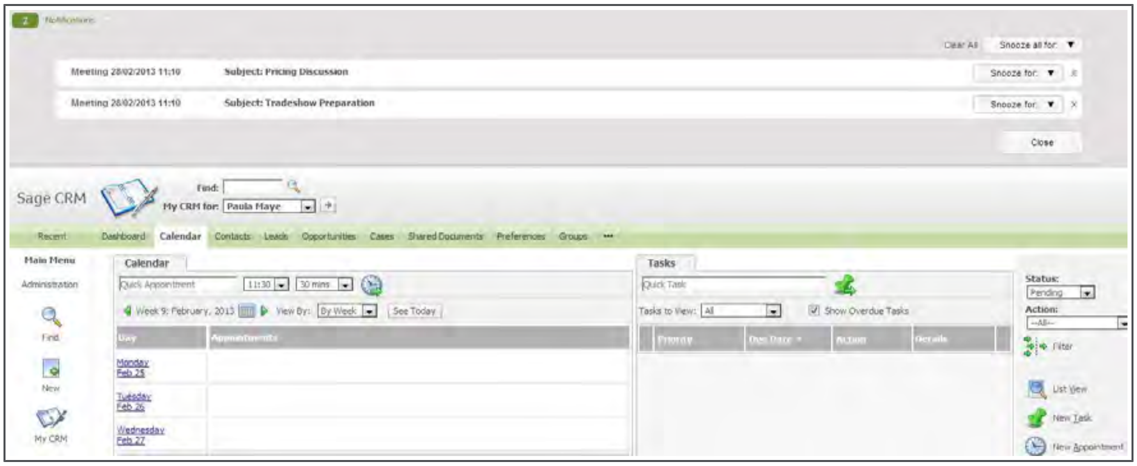
Quick Appointment

3. Select the **time** and approximate **duration** from the next two fields.
4. Click on the **Quick Appointment** button. The appointment is displayed in your Calendar for today. **Note:** Quick Appointments created in the Day view are scheduled for the day you are looking at, as opposed to the current day.

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

Notifications

Notification messages are displayed at the top of the screen. They are usually set and displayed as reminders for tasks or appointments.



Notifications displayed on-screen

- When you log on to CRM and you have notifications, the number of notifications is displayed in a Notifications bar towards the top of the browser window. Select the Notifications title bar to extend and view all the outstanding notifications.
- You can clear or "snooze" all of your reminders at the same time, or you can clear or snooze them individually.
- When one or more notification reminders are displayed on-screen, you can dismiss all of them by selecting the **Clear All** hyperlink. To clear a single notification reminder, select the close icon **(x)** next to the individual notification.
- When you extend an individual notification, you can choose the **View Original** link to go to the original communication that the notification relates to.
- You can "snooze" all of the on-screen notifications for a selected time interval, such as 30 Minutes, 6 Hours, or 1 Day by selecting the snooze interval from the **Snooze All For** drop-down list. To snooze a single notification reminder, select the snooze interval from the **Snooze For** drop-down list next to the individual notification.

Changing the Status of a Communication

From your Calendar:

1. Click on the **Action** icon of the task. The Task Details page is displayed.
2. As you are making the call, you can add notes to the Details field.
3. When the call is completed, select **Complete** from the Status list. You can also click on the Pending Status icon from the Calendar View. This automatically changes the status to Complete and displays the Task page.
4. Check the follow-up boxes if required.
5. Select the **Save** button. The Calendar page is displayed.

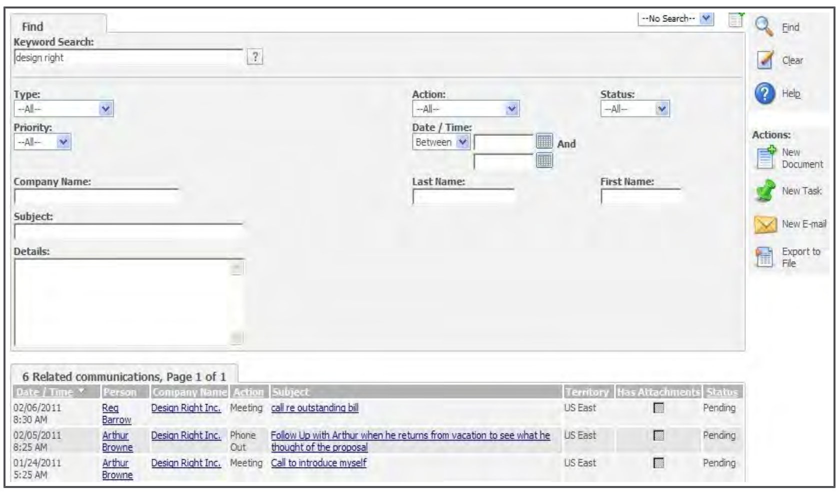
You will notice that the completed task no longer appears in your Calendar. It is, however, saved in the Communications tab of the Person the call was scheduled with, forming part of the customer history. **Note:** Tasks are "rolling" in CRM. This means that a task will stay in the Tasks panel of your Calendar until it is completed. Appointments are not rolling. They remain on the calendar on the date and time scheduled. Please refer to Navigating your Calendar (page 5-13) for more information.

Finding a Communication

"Hi Susan, Mike here. Did you ever get around to calling Arthur Browne at Design Right?"

To find a communication:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Communication** from the pop out list. The communication Find page is displayed.
3. Type or select the search criteria on the Find page.
4. Select the **Find** action button. A list of all communications matching your search criteria is displayed.



Communication Search results

5. Click on the hyperlink Status icon of the Communication. The Communication Details page is displayed, which gives you an overview of the communication.

"Mike, I called Arthur at the end of July, but he wasn't in. I spoke to his team leader and discovered that they do have a project coming up that we might be able to help out with."

Adding Attachments to Tasks

To add an attachment to a task:

1. Find an existing task and open it, or create a new task.
2. From the right-hand-side of the Task Details page, select the **Add Attachment** action button. If you are creating a new task and have not yet saved it, you are prompted to do so.
3. From the Attachments tab, select **Add File**. You can also drag and drop the attachment(s) to the **Drop files here...** area (non-IE only).
4. In IE, use the **Browse** button to navigate to the file.

5. For other browsers, select the file(s) you want to add from their current location. 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.
6. Select **Save** to complete the attachment of the file(s) to the task. You can use **Add File** to attach more files to the task.

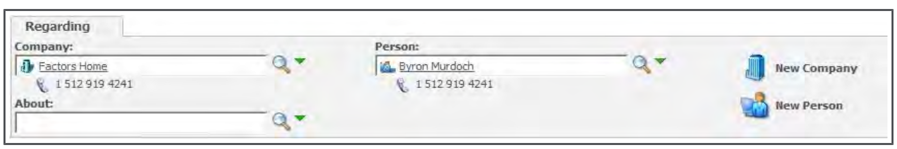
To view a file you have already attached, click on the **paperclip** icon next to the attachment, or drill into the attachment and select the **View Attachment** icon. All files attached to the task in the context of an entity (Company, Person, Opportunity etc) are also saved as entries in the **Documents**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

Reassign an Existing Task to a Colleague

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

Scheduling a Task for a Colleague

1. Select **My CRM** | **Calendar** tab.
2. Select the **New Task** button. The **Enter New Task** page is displayed.
3. Use the **Search Select** buttons to add the person you want to the Company and Person fields on the Regarding panel.



Regarding panel

4. Add in the task details, selecting your colleague from the **User** field.
5. Select the **Save** button.

The new task is displayed in the list of the Communications tab of the company and person selected. It is also displayed in the Calendar tab of the user it has been scheduled for.

The Created By field indicates who scheduled the task.

Checking a Colleague's Calendar

The ability to check a colleague's calendar depends on your security profile. If you have the appropriate rights, you can check calendars via My CRM or you can check them while you are scheduling a meeting.

To check a colleague's calendar via My CRM:

1. Open the **My CRM** | **Calendar** tab.
2. Type the first few letters of the user's name in the **Find** field in the context area at the top of the page.

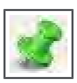
3. If there is more than one match, select the name from the **My CRM For** list. Otherwise, the name appears in the My CRM For field automatically.
4. Click on the **right-pointing** arrow beside the My CRM For field.

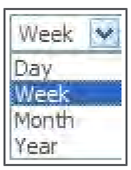
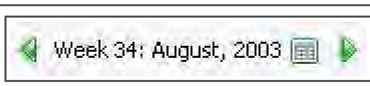
   Your colleague's calendar is displayed.

To check a colleague's calendar while you are scheduling a meeting:

1. Begin creating the meeting 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 meeting in the normal way.

Navigating your Calendar

Graphic	Description
	Select the New Appointment button to create a new appointment.
	Type in a few key words, select a time and approximate duration, and select the Quick Appointment button to create a quick unlinked calendar entry.
	Select the New Task button to create a new task. For example, a call back you need to make.
	Type in a few key words, and select the Quick Task button to create a quick item in your Task list for the day.
	Select the New E-mail button to create and send an e-mail.
	You can reduce or expand the list of Tasks that you see by changing the Tasks To View selections. You can also toggle overdue tasks on or off. Overdue tasks are highlighted in red.
	The Filter Box on the right-hand side of the screen is set by default to show all communications (appointments and tasks) with a status of Pending. You can change this to show Cancelled, Complete, or All types of Status. You can also set a filter to show, for example, only Phone Out

Graphic	Description
	actions. When you change filter settings, remember to select the Apply Filter button to see the effects.
	The List View button allows you to toggle to the list view of the Calendar/Tasks page. Once in the List View, you can toggle back to the Calendar View by selecting the Calendar View button.
	The Print button is available if you are in daily or weekly Calendar View. You use it to print out all appointments and tasks for the selected time range, as well as all overdue tasks.
	Your System Administrator defines the access rights to be able to view other peoples' calendars within your organization. If you do have access, you can select another user's name within the My CRM context area to view their calendar. To switch back to your own calendar, select your name from the context area of the screen. The My CRM For field is always available in this context. However, the Find field is available only when there are more then 10 users in the system.
	The View By list at the top of the calendar allows you to switch between daily, weekly, monthly, and yearly views of your calendar. The daily view can be customized from the My CRM | Preferences tab. Please refer to Accessing Preferences (page 22-1) for more information. **Note:** The monthly and yearly calendar views need more space to be displayed. With either of these options selected, the Tasks panel will not be displayed. The tasks are displayed on the Monthly and Yearly calendars.
	You can use the date display at the top of the Calendar panel to navigate forwards and backwards from the current date. You can click on the calendar icon to select a specific date. **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.

Graphic	Description
	Clicking on **View Today** displays the daily view of your Calendar for today's date. You can reschedule appointments in your calendar by drag-and-drop. Select the communication icon and, holding down the mouse button, 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.

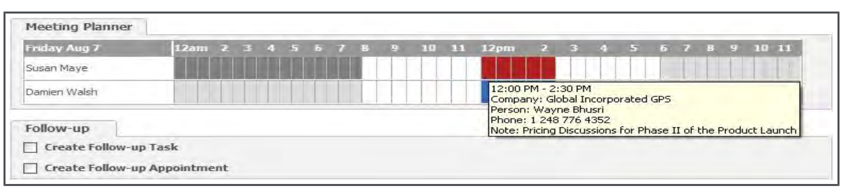
Meeting Planner

You need to set up a workshop with a customer, which requires attendance by your whole project team. If you have access to their calendars, you can review their availability as outlined in the section above. However, you would need to look at each person's calendar— one at a time.

To speed up the planning process, there is a meeting planner tool integrated into the Enter New Appointment page.

To schedule the meeting and invite your colleagues:

1. **Find** the customer you are having the meeting with and open their "file" so that the person's name appears in the context area of the screen. You can also schedule a new appointment from your Calendar tab by selecting the New Appointment button. You then search for the person within the Enter New Communication page.
2. Right-click on or hover over the **New** menu button. The Pop Out list is displayed.
3. Select **Appointment**.
4. Select the date and start and finish times of the meeting from the calendar. The meeting planner is displayed in a panel with your user name already selected as an attendee.
5. To invite colleagues, search for the names from the User field and click on the **Add** button. The invited users are displayed in the Meeting Planner panel. Any conflicts with the current meeting are highlighted in red. Hovering over the overlap shows the details of the meeting.



Meeting Planner showing overlapping meetings

6. To change the start or finish time of the meeting, click on the time line of the Meeting Planner, or use the Date/Time and End Time fields.
7. When you have completed the adjustments to the meeting times, click on the **Save** button.

The meeting is displayed in the Calendar of each invited user. When the appointment is viewed in the Team CRM calendar, an appointment icon is displayed for each invited user. **Note**: If a meeting spans more than a 24 hr period, a message is displayed in the Meeting Planner panel advising the user that "The selected date ranges are not valid for the meeting planner".

Reviewing the 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.

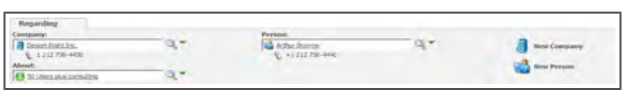
- With the company or person **Quick Look** tab selected, review your recent history with this company or person at a glance. The Quick Look tab lists the most recent communications, cases, and sales opportunities linked to the company or person.
- With the company or person **Summary** tab selected, 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.

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 panel

Note: "Regarding" does not equal "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.

User field on Scheduling panel

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.

Appointment viewed in the context of one of the External Attendees

- If you are working with **Exchange Integration**, and create the appointment in **CRM**, each person on the External Attendees tab with a valid e-mail address, is sent a **meeting invitation**.
- If you are 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 e-mail 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 7-8) 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.

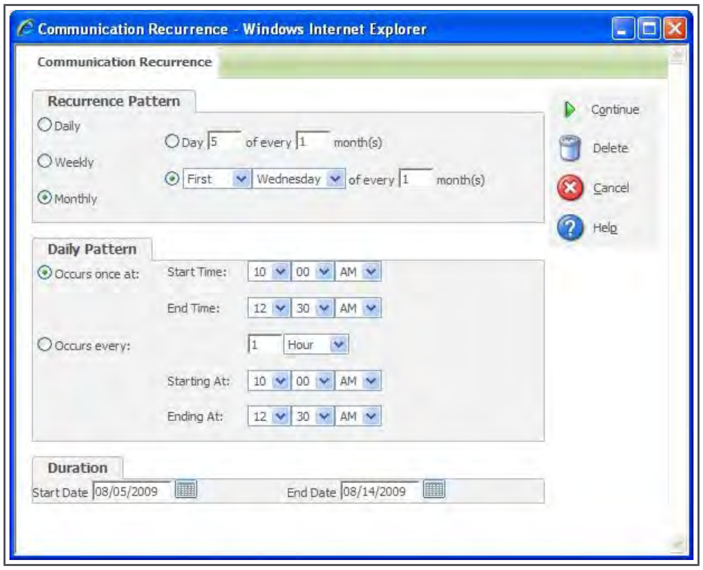
Many companies have regularly occurring events, for example, an Engineering Department progress meeting on the first Monday of every month. Instead of having to manually enter each event, this can be done by creating the appointment once and setting up a recurrence pattern.

Find out more about recurring appointments in:

Creating a Recurring Appointment (page 5-17)
Changing a Recurring Appointment (page 5-18)
Deleting a Recurring Appointment (page 5-19)

Creating a Recurring Appointment

1. Select the **New Appointment** button from within the Person, Company, Lead, Opportunity, or Solution context, or from within My CRM. The Appointment page is displayed.
2. Select the **Recurrence** button. The Communication Recurrence page is displayed in a new window.



Communication Recurrence page

3. Set the **Recurrence Pattern** to Daily, Weekly, or Monthly.
4. Select the **Daily Pattern** for each date in the series. This can be set to either Occurs Once At or Occurs Every. When the Occurs Once At option is selected, just one communication is created for each date set up in the recurrence pattern. When Occurs Every option is selected, several communications are created. The Starting At and Ending At times enable you to specify a range in which the communications will occur.

   Note: The recurring appointment Daily Pattern option, **Occurs Every**, is disabled if Exchange Integration is being used.

5. Select the **Start Date** and **End Date** for the recurring pattern of appointments.
6. Select the **Continue** button.
7. Select the **Save** button. Appointments are created for the time, frequency, and duration selected in the Communication Recurrence page.

Note: The default maximum number of occurrences is 200. This is set by the System Administrator. If you exceed the maximum number of occurrences, an error message is displayed before you are allowed to save the recurring appointment.

Changing a Recurring Appointment

- Click on the hyperlink icon of the appointment. The Appointment page is displayed.
- To change the Date or Time or any of the recurrence details, you need to select the **Recurrence** button, make the changes in the Communication Recurrence page, and select Continue.
- The text on the lower part of the Scheduling panel indicates the current recurrence status of the appointment.
- To change any other details of the communication, for example, the users taking part in a meeting, make the changes, decide if they apply to just this or all the recurrences of this appointment, and select Save.
- When you select Save after making changes to a Recurring Appointment, a dialog box opens giving you the option to apply the changes to the current instance of the appointment, all the recurrences of the appointment, or the current instance and all other instances of the appointment

in the future. Select **This Appointment Only**, **All Appointments In The Series**, or **This and Future Appointments**, and click OK.

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

Deleting a Recurring Appointment

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

However, note that selecting the **All Appointments In The Series** option results in all recurrences of the appointment being deleted.

Deleting a Communication

A Delete action button is available on the Task or Appointment Details page if your System Administrator has given you the rights to delete communications.

Before deleting, consider whether changing the communication status to Complete or Cancelled may be a better solution. All communications, even completed ones from the past, form an important part of the customer history.

To delete a communication:

1. Find and open the communication you want to delete.
2. From the Details page, click on the **Delete** button. If the communication has one or more attachments, for example an e-mail or a letter, then the attachments will also be deleted, and they will no longer be 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. Select the **Confirm Delete** button to go ahead and delete, or **Cancel** if you do not want to delete.

Chapter 6: E-mail

In this chapter you will learn how to:

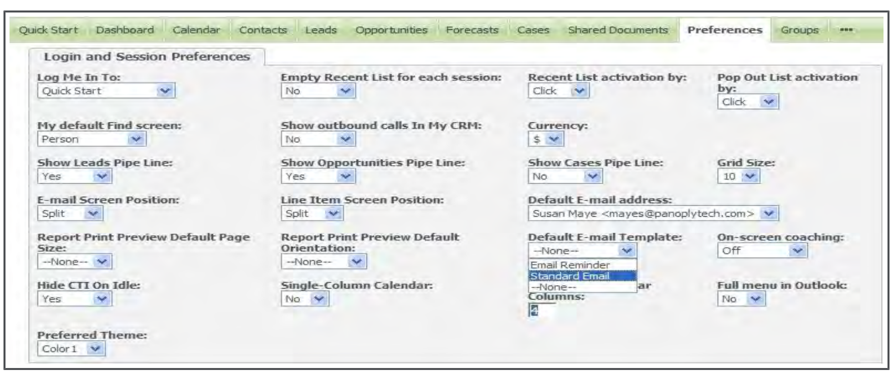
- **Set up a default e-mail template**.
- **Send e-mails from CRM**.
- **Reply to an e-mail**.
- **Handle inbound e-mail**.
- **Keep e-mails with customer records**.
- **Use MS Outlook to send e-mails**.
- **Use e-mail shortcuts in CRM**.

Setting a Default E-mail Template

You can set a default e-mail template, so that when you create a new e-mail the default e-mail template will be selected automatically, and all of the values of the default template will be copied to the new e-mail. The System Administrator defines the list of default e-mail templates that you can select from.

To set a default e-mail template:

1. Click on the **My CRM** button.
2. Select the **Preferences** tab and then click on the Change button.
3. Select the e-mail template you want to set as default from the **Default E-mail Template** drop-down list.



Preferences tab

4. Click on the **Save** button to save the new settings.

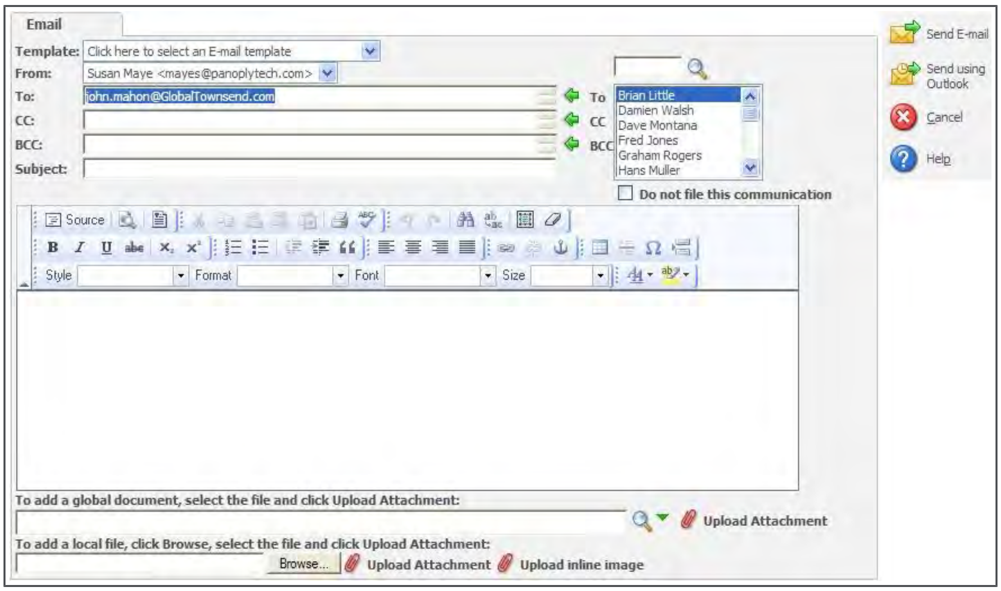
Sending an E-mail

CRM takes advantage of having all of your customer and prospect data in the system, by providing a functionality for sending and receiving e-mails so that you:

- Don't need to retype or remember contact e-mail addresses that are already in the system.
- Can store e-mails with the customer record for future reference.
- Can convert inbound e-mails directly to a Customer Service Case, a Sales Opportunity, or new Lead.

To send an e-mail from CRM:

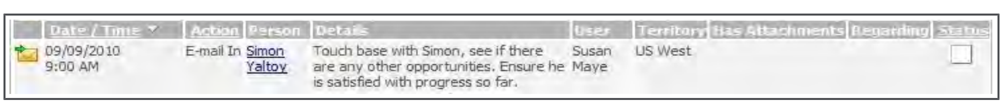
1. Search for the customer you want to send an e-mail to.
2. Click on the hyperlink of the person's e-mail address. The E-mail input form is displayed.



E-mail input form

3. The E-mail input form can be opened by clicking on any hyperlinked e-mail address in the system, or by clicking on the New E-mail button from within the My CRM | Calendar tab, or from any Communications tab. The e-mail screen can be displayed in different modes:
   - Normal. The e-mail screen takes up the whole CRM screen.
   - Split. The e-mail screen is displayed in the lower half of the screen. This allows you to carry on working in the system, performing such tasks as searching for people or companies and viewing their details, while writing the e-mail in the lower half of the screen. This is the default way the screen appears.
   - Popup. The e-mail screen is displayed in a new browser window. This also allows you continue working in the system and write the e-mail at the same time.
4. You can switch from Split to one of the other screen positions by changing the E-mail Screen Position setting from the My CRM | Preferences tab. For information on changing your Preference settings, please refer to Preferences (page 22-1).
5. Select a template from the Template list or leave the default selection to start a blank e-mail. CRM templates usually contain standard content and field codes. Further formatting layouts are available from the **Layouts** toolbar button.
   If you have a large number of templates you can type a template name and select the Go button to search. The standard setting for the search to appear is when there are more than ten templates.
6. The **From** list contains your e-mail address by default. However, if you have been given permission to send e-mails from other accounts, you can select the addresses from this list. You can also change your default e-mail address in My CRM | Preferences if you have been given permission to send e-mails from other accounts.

7. Select the **Reply To** address in the same way as you selected the From address. Whether the Reply To e-mail addresses are available depends on whether you have been given permissions to send e-mails from other accounts. If you have not been given permissions, the field is not displayed.
8. Check you have the intended recipient of the e-mail in the To field.
    - If you are already in the context of a person when you click on the New E-mail button, or you have clicked on the person’s e-mail address hyperlink, then the e-mail address is already displayed in the To field.
    - If you are working in split-screen or popup mode, then you can Find the Person or Company that you want to send the e-mail to, and click on the hyperlink of their e-mail address.
9. Enter the e-mail address of the person you want to CC the e-mail to in the **CC** field. You can specify more than one person here if you wish.
    - If you want to **BCC** the e-mail to anybody, enter their e-mail address(es) in this field.
    - If you want to include CRM users in the To, CC, or BCC fields you can add them by selecting their name from the list of users and clicking on the **To**, **CC**, or **BCC** button. You can include as many users as you wish in this way, but you must add them one-by-one.
10. Type your message in the body section. You can format the text you entered with the formatting buttons at the top of the body field. There a number of new formatting options, including bullets and numbering, tables, text highlighting and the ability to change text color.
11. You can also include HTML content and inline images in the body. For more information on adding HTML content and inline images to the e-mail body and formatting text, please refer to Sending Mass E-mails (page 16-17).
12. You can check the spelling of your e-mails before you send them by clicking the **Check Spelling** button. The spell check is carried out in the language of the user set by the System Administrator in Administration | Users. Language dictionaries available include German, Spanish, French, UK English, and US English. If there is no spell checker dictionary available for the language of the user, then US English is used.
13. To attach a shared document, use the Advanced Search Select icons to locate the file, select the file and then select the **Upload Attachment** button. Please refer to Advanced Search Select (page 2-9) for details on using the Advanced Search Select buttons.
14. To attach a local file, select the **Browse** button, navigate to the file, and select the **Upload Attachment** button.
15. You can remove the attachment by selecting the delete button, which is displayed once the file is uploaded.
    - When you send the e-mail, a communication record is automatically created and stored against each person the e-mail was sent to.
    - The Communication Options panel displayed at the end of the E-mail input form allows you to change the default entries for some of the Communication fields.
16. Make any changes required to the fields on the **Communication Options** panel.
17. Select the **Send** button to send the e-mail. Once the e-mail is sent, it is saved as a Communication against the Person it was sent to and in your Calendar. To view the e-mail you sent, click on the Communications icon.



Communication for Person

E-mail Shortcut Keys

You can use the following short cuts on any hyperlinked e-mail address for inserting contact information into the e-mail address fields:

Short cut	What it does
Shift + Click	Opens new e-mail and puts addresses in To field.
Ctrl + Click	Opens new e-mail and puts addresses in CC field.
Alt + Click	Opens new e-mail and puts addresses in BCC field.

Handling Inbound E-mails

If you have the Outlook Plug-in for either Exchange Integration or Classic Outlook Integration installed, then you can use the File E-mail button from Outlook to file an inbound e-mail communication with the customer record in CRM. Please refer to Filing E-mails from Outlook to CRM (Classic Outlook Integration) (page 8-15) or File E-mail (page 7-13) for more information.

If E-mail Management is set up on your system, inbound e-mails can automatically get filed against the matching person or company record. Please refer to Filing Inbound and Outbound E-mails (page 6-5) for more information. Please refer to Linking E-mail Correspondence to a Customer (page 9-10) for more information.

Replying to an E-mail

To reply to e-mail that is stored in CRM with a communication record:

1. **Find** the person who you received the e-mail from.
2. Select the **Communications** tab within the context of that person.
3. Click on the Communications icon of the e-mail you sent. The E-mail In page is displayed.
4. Select the **Reply** or **Reply All** button. The E-mail input form is displayed.
5. Complete all of the fields and send the e-mail. Please refer to Sending an E-mail (page 6-1) for a description of the fields.

Using Microsoft Outlook to Send E-mails

You can merge customer details with the e-mail functionality in CRM and then send the e-mail using Outlook.

To send the e-mail using Outlook:

1. Find the person you want to send the e-mail to.
2. Click on the hyperlink of the person's e-mail address. The E-mail input form is displayed.
3. Instead of selecting the Send button, click the **Send Using Outlook** button. An Outlook window is displayed, containing the To address of the selected person.
4. Type the body of the e-mail.

5. Select the **Send** button in the Outlook window. The e-mail is sent by Outlook, and it is also saved with the communication record against the person or company it was sent to.

Note: Any attachments to the CRM e-mail will be attached automatically to the Outlook e-mail.

Converting E-mails

You can convert either an inbound or outbound e-mail communication to an opportunity, case, or lead.

For example, you receive an e-mail with a problem from a customer. If you have E-mail Management installed, inbound e-mails can automatically get filed against the matching person or company record. You can then convert the e-mail directly to a customer service case using the workflow buttons on the right-hand side of the Communication page.

Even if you do not have these additional modules installed, you can convert any existing communication, where the action type is E-mail In or E-mail Out to a case, opportunity, or lead.

To do this:

1. Open the **E-mail In/Out** communication that was created when you sent or received the e-mail.
2. Select **New Case**, **New Opportunity**, or **New Lead** from the **Create** list.
3. Enter the details of the case, opportunity, or lead and select the **Save** button. The case, opportunity, or lead is saved against the person or company you sent the e-mail to.

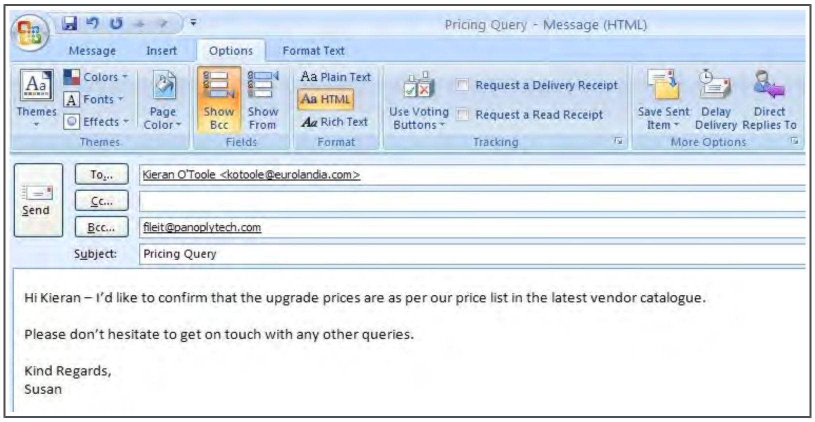
Filing Inbound and Outbound E-mails

You can carry out basic filing of e-mails from Outlook to CRM using the Outlook Plug-in for either Exchange Integration or Classic Outlook Integration. Please refer to Filing E-mails from Outlook to CRM (Classic Outlook Integration) (page 8-15) or File E-mail (page 7-13) for more information.

If your System Administrator has set up CRM to use the E-mail Management functionality, additional automated e-mail filing is available to you.

E-mail Out

- E-mails sent from CRM, or from CRM using the Send Using Outlook button, are automatically BCCed to a Mail Manager Server Filing address.
- **Note:** In CRM, this address is not visible in the BCC field, but you can tell if the E-mail Management functionality is set up, as this Mail Manager Server filing address is visible in the BCC field if you click the Send Using Outlook button.

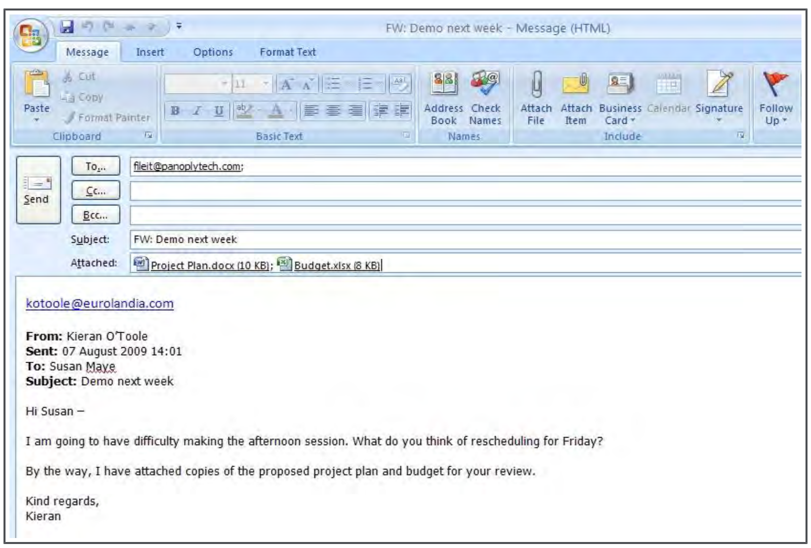


Outlook E-mail

- You can also send e-mails from outside of CRM to a customer and manually add the Mail Manager Server Filing address to the BCC field.
- The effect of using E-mail Manager on outbound e-mails is that regardless of whether you send the e-mail from CRM, or direct from Outlook (or other E-mail application) and manually BCC the Mail Manager Server Filing address, a communication record will automatically be created against the customer who matches the e-mail address in the To field. Please refer to Rules Applied to E-mail Handling (page 6-7) for more information.
- Attachments to e-mails are also filed with the communication record in CRM

E-mail In

- Inbound e-mails can be forwarded to the Mail Manager Server Filing Address. When this happens, a new Communication record is created in CRM. Attachments are saved with the communication.



Forwarding an Inbound E-mail to the Mail Manager Server Filing Address

- For e-mails received by users and then forwarded to the Mail Manager Server Filing Address, this e-mail address must be the only address in the To field.
- The original sender's e-mail address must be the first e-mail address contained in the body of the e-mail that is forwarded to the mailbox. This is because E-mail Management recognizes the first address in the body as being the original sender's address. **Note:** You may need to retype the sender's e-mail address at the top of the forwarded e-mail to ensure this filing takes place correctly.

E-mail In Communication record in CRM

This E-mail Management functionality can be further customized by your System Administrator so that, for example, any incoming e-mails to the support@*domain*.com automatically create a Case assigned to the Customer Service team. Check with your System Administrator for more information.

Rules Applied to E-mail Handling

1. When an e-mail is received in the specified mailbox, the e-mail database table is checked for all the people associated with the e-mail address.
2. If only one person is associated with that e-mail address— even if the e-mail address is used as a private and business type—a communication is created for that person, which is also associated with the CRM user.
3. If an associated person cannot be found or if multiple people are associated with the address, the e-mail table is checked for an associated company and a communication is created for that company. This is also associated with the CRM user.

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 e-mails, 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 7-10).

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 are working with Classic Outlook Integration, please refer to Adding Contacts: CRM to Outlook (Classic Outlook Integration) (page 8-6) for more information on working with the My CRM | Contacts tab.

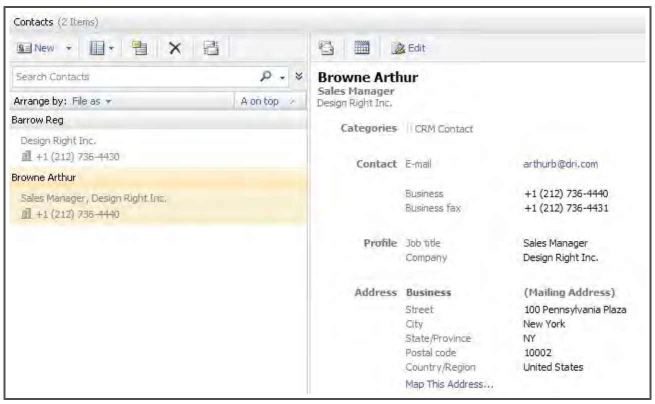
To flag CRM contacts for synchronization with Exchange:

1. Select **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. Select the **Add Contacts** button. The Contacts page is displayed, showing the contacts that you selected.

Contacts list

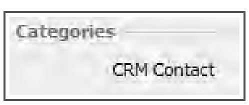
5. You can perform further searches to add more people to the Contacts tab.
   - A quick way of adding, for example, all contacts where you are the Account Manager, is to select the **Add Group Of Contacts** button. You can also add a person to the Contacts tab from the Summary tab of any person in CRM, by selecting the **Add To My Contacts** button.

6. After the next synchronization has taken place, select the **Contacts** folder in Outlook to check the people you chose from CRM are there.



Contacts in Outlook Contacts folder

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



CRM Contact category

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 7-12) 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 are 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

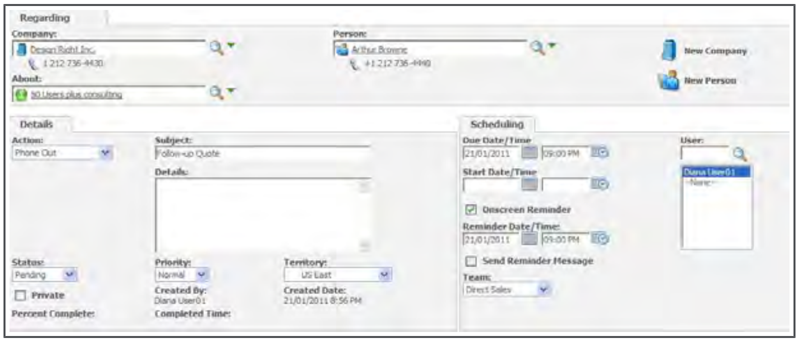
system - it is ignored for deduplication purposes.

- "**Mass**" tasks, tasks generated against groups or lists, are not synchronized.

Tasks: CRM to Exchange

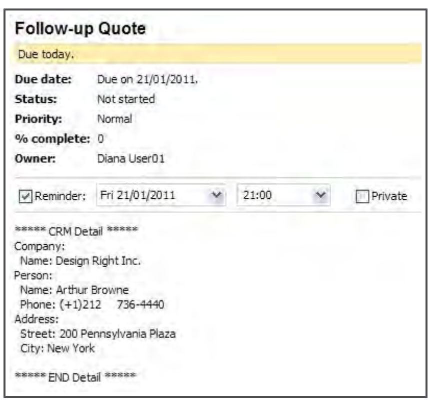
To create a task in CRM and view it in your mailbox:

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.



Enter New Task page

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.

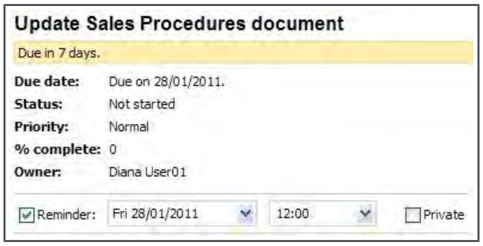


Task in Outlook

Tasks: Exchange to CRM

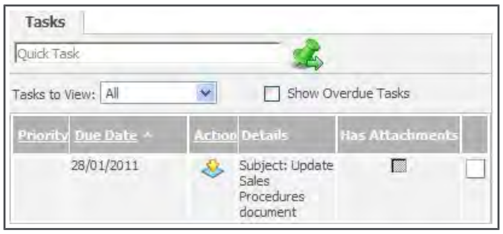
To create a task in Exchange and view it in CRM:

1. From Outlook, add a new task (**Tasks** | **New**).
2. Select **Save and Close**.



Task in Outlook

3. Switch to CRM, and after the next synchronization has taken place, check **My CRM** | **Calendar** for the new task.



CRM Tasks in Calendar view

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").

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 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.

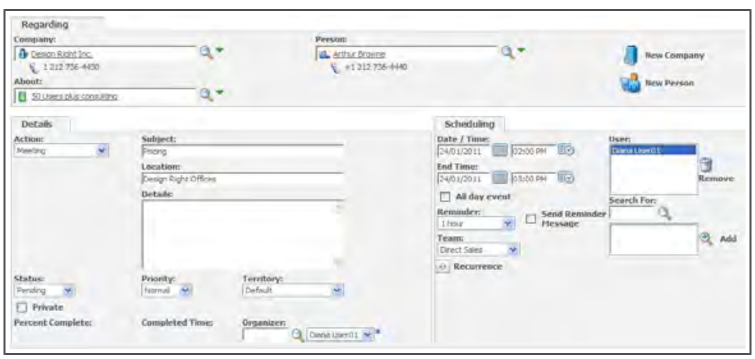
Exchange to CRM and CRM to Exchange

- **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

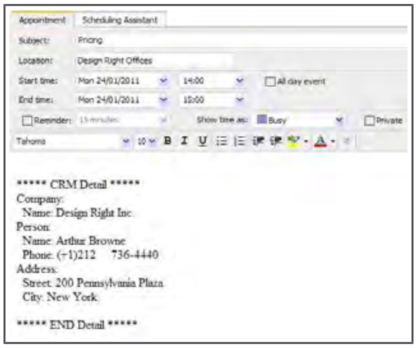
To create an appointment in CRM and view it in your mailbox:

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 5-2) for more information on how to do this.



Enter New Appointment page

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.



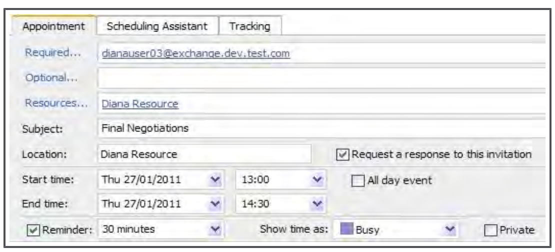
Appointment in Outlook

If the e-mail address of a Resource user in CRM matches a mailbox address in Exchange, then the resource displays in Exchange as a Required attendee.

Appointments: Exchange to CRM

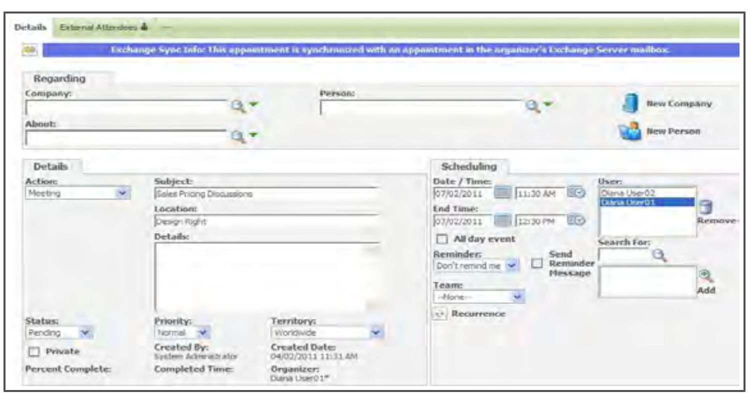
To create an appointment in Exchange and view it in CRM:

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. Select **Save and Close** or **Send**.



Appointment in Outlook

3. Switch to CRM, and after the next synchronization has taken place, check **My CRM** | **Calendar** for the new appointment.



Appointment in CRM

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 on 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 5-16) 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.

Appointment in context of invited customer

- Attendees from Exchange, whose mailboxes map to Resource user e-mail addresses in CRM, are added to the User list in CRM. If they do not map to Resource user e-mail 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.

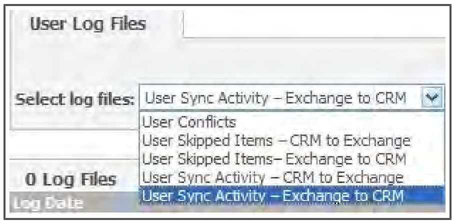
These invitee copies of appointments are called **Stub Appointments**. They are read-only. Click on the **Exchange Sync Info** icon in the top left of the page, and a blue banner gives you more information on the status of the appointment.

Stub Appointment

Reviewing Exchange Integration Logs

To review your own log files:

1. Select **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.



Select log files drop-down list

3. Click on the hyperlink of 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:

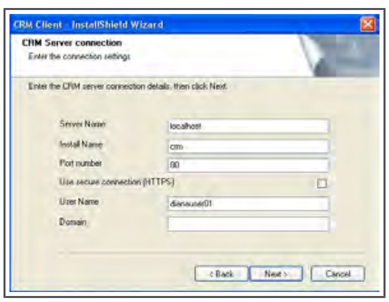
- Users must be administrators of their own machines to carry out this installation.
- You are running Outlook 2007 or 2010.
- The System Administrator has given you rights to see the plug-in button.

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

1. Select **Install CRM Outlook Exchange Integration** from **My CRM** | **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.

.NET Framework install dialog

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. Select **Install**, and follow the steps on-screen. During the install, you are prompted to confirm connection settings (see table below).



CRM Server connection dialog

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

Field	Description
	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**, select **Sage CRM Client Applications**, and follow the steps on-screen.
3. You can reinstall manually from My CRM | 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 are 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 e-mails to CRM. An e-mail 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 e-mail. Launches the **File E-mail** page once the e-mail 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 e-mail.Lets you attach documents from **My CRM** | **Shared Documents**.
Help	Sage CRM menu. Launches Sage CRM help for the

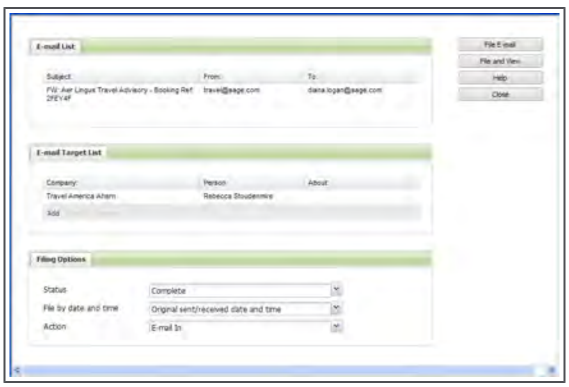
Option	Location / Description
	Outlook Plug-in for Exchange Integration.
About Sage CRM Plug-in	Version information on the plug-in.

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

File E-mail

To file one or more e-mails from Outlook/Exchange to CRM:

1. Highlight the e-mail(s) to file and select **File E-mail** from the toolbar. CRM searches for matches on the **From** address for **incoming** mail, and on the **recipients** e-mail addresses for **outgoing** mails. The results are displayed in the E-mail Target List.



File E-mail

2. Use the **Add** and **Remove** buttons to find or remove target companies/people to file under. If multiple people are selected, the e-mail(s) are filed against each target specified.
3. Set the **Filing Options** to determine what kind of communication the e-mail(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.

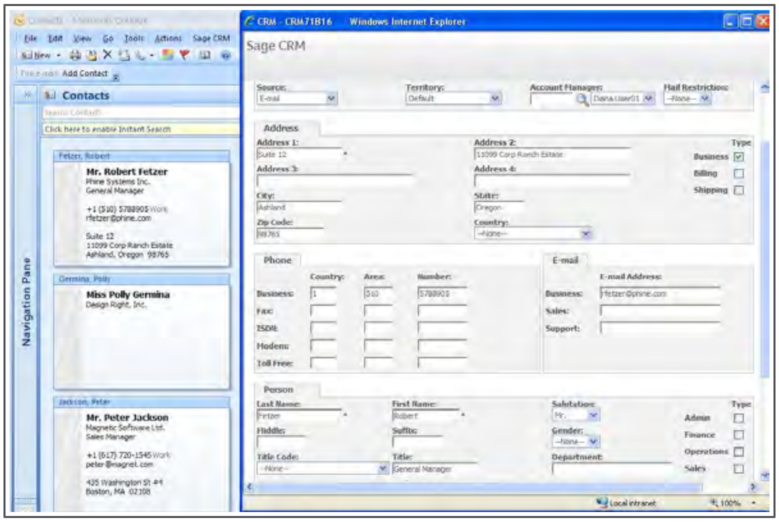
Filed e-mails are marked with the message **Filed to Sage CRM**.

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 select 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 4-17) for more information.



Add Contact

2. Review and complete the contact details in CRM, then select **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

In this chapter you will learn how to:

- **Download the Outlook plug-in for Classic Outlook Integration**.
- **Use CRM from within Outlook**.
- **Synchronize Contacts from CRM to Outlook**.
- **Synchronize Contacts from Outlook to CRM**.
- **Change and Delete Contacts.**
- **View contact information from Outlook**.
- **Synchronize Outlook Appointments and Tasks**.
- **Synchronize CRM Appointments and Tasks**.
- **Review Synchronization Conflicts**.
- **Review Skipped Items**.
- **Attaching Shared Documents to Outlook E-mails**.
- **File E-mails from Outlook to CRM**.
- **Reinstalling the Outlook plug-in for Classic Outlook Integration**.
- **Uninstall 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 e-mail account runs on Microsoft Exchange Server, or is a POP3 e-mail account, as CRM Outlook client integration is supported for e-mail 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 are running either Outlook 2007 or Outlook 2010.
- Check with your System Administrator that you are an administrator of your own machine and that Outlook integration / synchronization has been enabled.
- Check that your timezone is set correctly in My CRM | 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. From CRM, select the Preferences tab. The Preferences page is displayed.
3. Select the **Install CRM Outlook Integration** button. If the Microsoft .NET framework is not already installed on your computer, you are prompted to install it at this point. The .NET framework must be installed for the Outlook plug-in to work.
4. Once the .NET installation has finished, select the Continue button. The Security Warning dialog box is displayed.
5. Verify the information in the security prompt, and select the Run button. The CRM Client InstallShield Wizard is displayed.

   Note: 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.

6. Make sure you are logged off CRM and Internet Explorer and Outlook are closed before continuing with the install.

   Note: If you are running Vista and want to connect to CRM using HTTPS, you must select the Custom option during the CRM Outlook Integration install, and then mark the Sage .NET Tools check box.

7. Complete the InstallShield Wizard steps.
8. 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 following are described as they appear in **Outlook 2007**. If you are working with **Outlook 2010**, most of the same options are available, but from the Sage CRM group on the **Mail | Home** ribbon. In **Outlook 2010**, the following features are **not** available:

- **CRM folder** - the full CRM application cannot be used within Outlook 2010
- **View Contact** - this button is not available in Outlook 2010

In **Outlook 2007**, working with CRM from within Outlook is similar to working with CRM in its own browser window, but there are some differences:

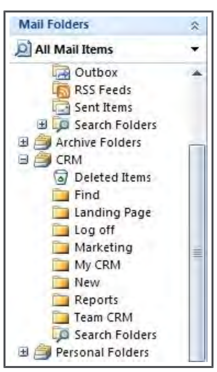
- The Menu buttons appear as sub-folders underneath the CRM folder, or as icons in the CRM group, instead of appearing down the left-hand side of CRM.

You can use either the shortcut group or the sub-folders to navigate CRM in Outlook.

These are the default settings to maximize the space you have to view CRM within Outlook. The usual menu and navigation buttons on the left-hand side of the CRM page can be reactivated via the Full Menu in Outlook setting in My CRM | Preferences. The Full Menu in Outlook setting can be altered in either CRM or Outlook, and you will see the change the next time you log on to CRM via Outlook.

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

- A CRM **toolbar**. See table below for details.
- A CRM folder in the Folder List and a new CRM group in the Shortcuts. In Outlook 2007, this folder displays after the first successful logon to CRM.



CRM folder in Outlook

- A CRM menu option on the Tools menu. This can be accessed from **Tools** | **CRM**. See table below for details.
- CRM Options page. This can be accessed from **Tools** | **CRM** | **Options**, or by selecting the Options button on the CRM Logon page.

CRM Options page

The following table explains the CRM **toolbar** buttons.

Toolbar Button	Description
CRM	Select this button to log onto CRM from Outlook.
View Conflict Log	View conflicts which arise during synchronization to field-level detail.
File E-mail	File single or multiple e-mail records with the company or person record in CRM
View Contact	Highlight an Outlook contact, that has been synchronized with CRM, and the CRM Person Summary page for that contact is displayed in Outlook.
Add Contact	Highlight an individual Outlook contact, then add to CRM using this button.
Sync	Initiates a synchronization between CRM and Outlook.

The following table explains the **Tools | CRM** selections.

Menu Option	Description
View Skipped Items	View details about items that were skipped during synchronization. Please refer to Reviewing Skipped Items (Classic Outlook Integration) (page 8-13) for more information.
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.

Menu Option	Description
Uninstall	Uninstalls the CRM Outlook plug-in.
Options	Opens the CRM Options page.
View Conflict Log	View conflicts which arise during synchronization to field-level detail.

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

Menu Option	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*] **Note**: If you are running Vista and want to connect to CRM using HTTPS, you must select the Custom option during the CRM Outlook Integration install, and then mark the Sage .NET Tools check box.
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 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.
Toolbar to Display CRM Buttons	When creating, forwarding, or replying to an e-mail from Outlook while logged on to CRM, two extra buttons are displayed on the Standard Outlook toolbar by default - Send And File and Attach Shared Doc. This option allows you to move these toolbar buttons to any Outlook toolbar.
New Mail Buttons Positions [] from the Left Side	This option allows you to position the toolbar buttons described above on the toolbar.

Synchronizing Contacts (Classic Outlook Integration)

Once you have flagged the CRM contacts you want added to Outlook, or if you amend or delete flagged contacts, the end result is reflected in Outlook once a synchronization takes place.

Outlook contacts, on the other hand, get added to CRM manually with the Add Contact button. If you amend or delete these contacts in Outlook, the end result is reflected on CRM once a synchronization takes place.

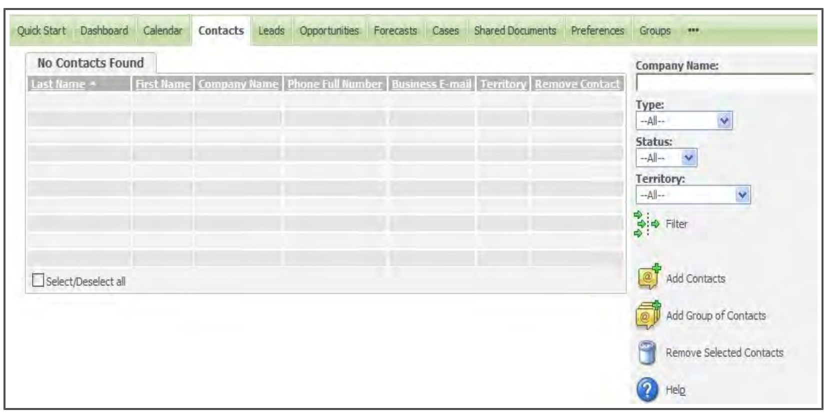
Once contacts have been synchronized, it doesn't matter if you make changes to them in Outlook or in CRM—the details get synchronized both ways. Synchronization can be done manually, or it can be done automatically at specified intervals.

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.

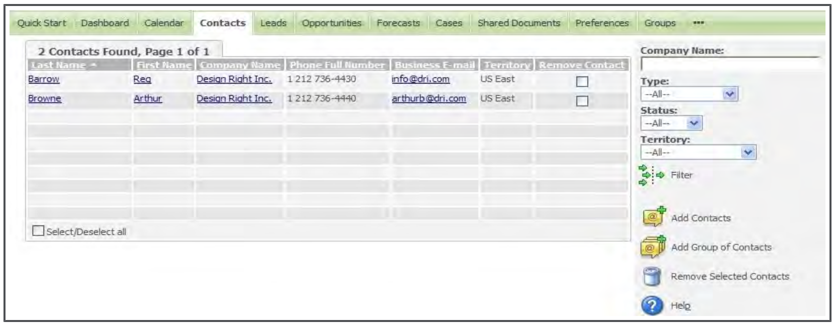
To flag CRM contacts and synchronize them with Outlook:

1. Select the **Contacts** tab from My CRM. The Contacts page is displayed.



Contacts page

2. Select the **Add Contacts** button. 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 on any subject heading except **Remove Contact**.
5. Select the **Add Contacts** button. The Contacts page is displayed, showing the contacts that you selected.



Contacts page

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 select the Add Group Of Contacts button. You can also add a person to the Contacts tab from the Summary tab of any person in CRM, by selecting the Add To My Contacts button.
   - You can perform actions (Start Mail Merge, New Task, Send E-mail, Export To File) on your Contacts list in the same way as you can for any search lists or saved searches.
   - You can wait until the next automatic synchronization takes place, or you can synchronize manually at this point if you wish.
7. Select the **Sync** button from the Outlook toolbar 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 on the contact in Outlook.

CRM Contact Category

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.

Note: 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.

To add Outlook contacts to CRM:

1. Select **Contacts** from the Outlook Shortcuts group.
2. Highlight the contact you want to add to CRM.

3. Select the **Add Contact** button from the toolbar.
    - If the Outlook contact contains a company, a dedupe is performed on the Company name. Please refer to Preventing Duplicate Entries (page 4-17) 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 on it. Alternatively, if no company on the list matches the contact you are adding, you can click on 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 4-17) for more information on handling duplicate contacts. If any duplicates are detected, they are displayed. You can select a contact by clicking on 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 select 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 on it. Alternatively, if nobody on the list matches the contact you are adding, you can click on the Ignore Warning and Enter Individual button.
        - You can create a company for the contact in CRM by selecting the New Company button on the Person details page. Please refer to Adding a New Company (page 4-2) for more information on creating companies.
4. Select **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 My 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. Select the **Contacts** icon in Outlook.
2. Highlight the contact you want to view detailed information on.

3. Select 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)

Note that before you start working with the Outlook Synchronization feature, you need to check that your correct Time Zone is specified in My CRM | Preferences.

- At the first synchronization all **recurring appointments**, and all **appointments** which have been modified in last fourteen days, or which have an end date between the previous 14 days and today, get synchronized.
- At subsequent synchronizations all **appointments** modified since the last synchronization get synchronized.
- At the first synchronization all **tasks** which have been modified in last fourteen days, or which have a status of Pending or In Progress are synchronized.
- At subsequent synchronizations all **tasks** modified since the last synchronization are synchronized.

Outlook Appointments and Tasks (Classic Outlook Integration)

To schedule a task from Outlook:

1. Select the **Calendar** folder in Outlook.
2. Select the **New** drop-down arrow on the Toolbar, and select Task. The Task window is displayed.
3. Complete the details of the task, and set a reminder if you wish. 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. Select the **Save And Close** button. The task is displayed in your Task list in Outlook.
5. Select the **Sync** button, then switch to CRM. The task is displayed in My CRM. If you set a reminder in Outlook, this will pop up in Outlook as a Reminder, and in CRM as an on-screen notification.

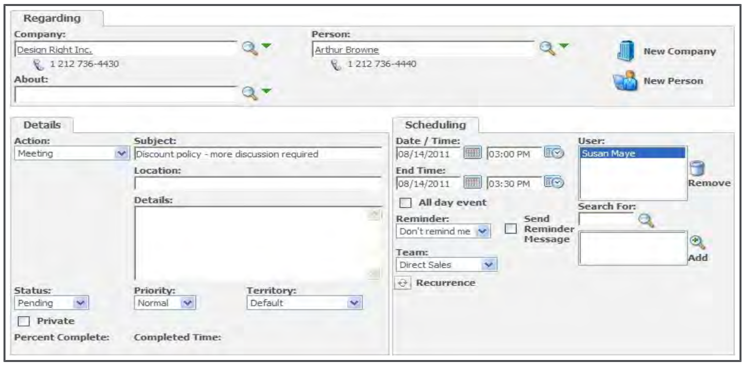
   Tasks created in Outlook are given the default completion time of 12 noon on their Due Date in CRM.

   If you set a reminder in Outlook, this will pop up in Outlook as a Reminder, and in CRM as an on-screen notification.This applies for Tasks and Appointments.

CRM Appointments and Tasks (Classic Outlook Integration)

To schedule an appointment in CRM:

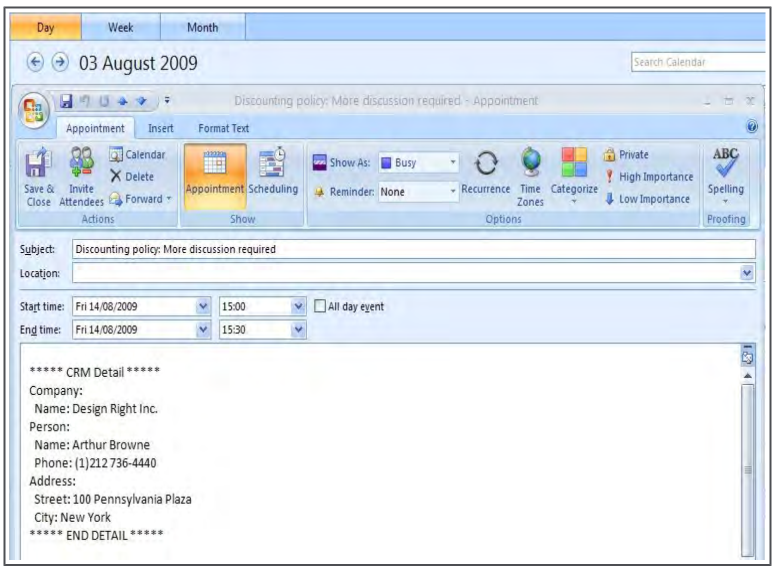
1. Set up the appointment with a contact, for example Arthur Browne, in CRM for next week, and select **Save**.



Appointment in CRM

2. Switch to **Outlook**.
3. Select the **Sync** button.

   The appointment is displayed in your Outlook Calendar.

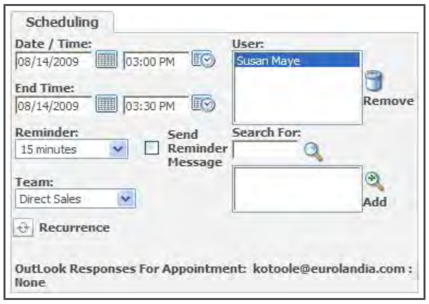


Appointment in Outlook

Working with Appointments, Meetings and Multiple Users (Classic Outlook Integration)

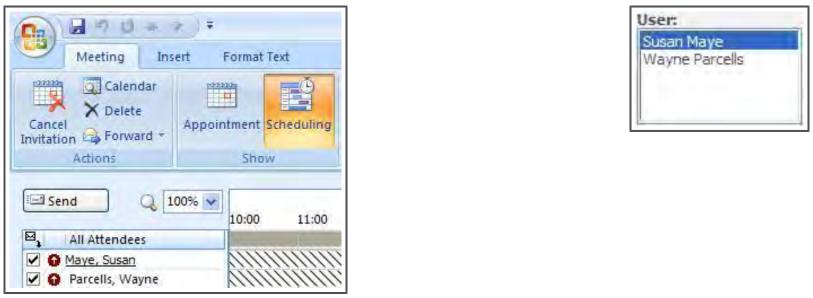
When you are synchronizing appointments between Outlook and CRM, in particular where some of the users may only use Outlook and not CRM, the synchronization takes place as follows:

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



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 e-mail addresses have been set up against the user. The Outlook meeting organizer is displayed in the Organizer field in CRM.



CRM users as Attendees in Outlook and CRM

- If you create an appointment with a person, for example, Arthur Browne in CRM, his e-mail 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 e-mail 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)

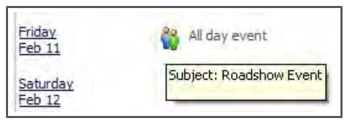
When creating a recurring Appointment in Outlook, an End By date must be selected on the recurrence dialog box if the appointment is to be synched to CRM. Recurring Tasks are not synchronized from Outlook to CRM. Recurring Appointments created in CRM get synchronized to Outlook.

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.

If you are running Windows Vista in Protected Mode, it is not possible to add recurring appointments when using CRM via Outlook. However, it is possible if you add CRM as a trusted site and turn off Protected Mode for the trusted sites zone. **Note**: You must disable Protected Mode at the zone level - it cannot be disabled for individual sites.

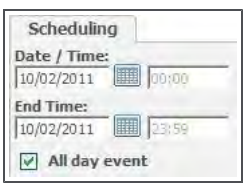
All Day Events (Classic Outlook Integration)

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.



All Day Event created in Outlook

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



24 hr Appointment created in CRM

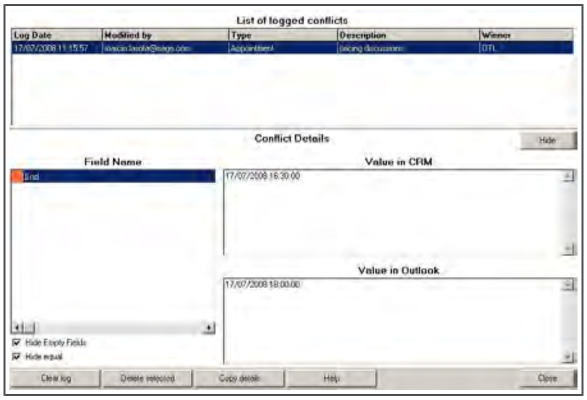
Reviewing Synchronization Conflicts (Classic Outlook Integration)

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). Please refer to Synchronizing Appointments and Tasks (Classic Outlook Integration) (page 8-9) for more information.

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. Select the **View Conflicts** button from the Synchronization Process dialog box or from the View Conflicts toolbar button. The Synchronization Conflicts window is displayed.



Synchronization Conflicts window

2. Select 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. Select the **Close** button 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 will 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, select **Tools | 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 E-mails (Classic Outlook Integration)

When you are logged on to CRM from within Outlook, you can attach documents from the Shared Documents tab in CRM to e-mails sent from Outlook.

To attach a shared document to an Outlook e-mail:

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

Filing E-mails from Outlook to CRM (Classic Outlook Integration)

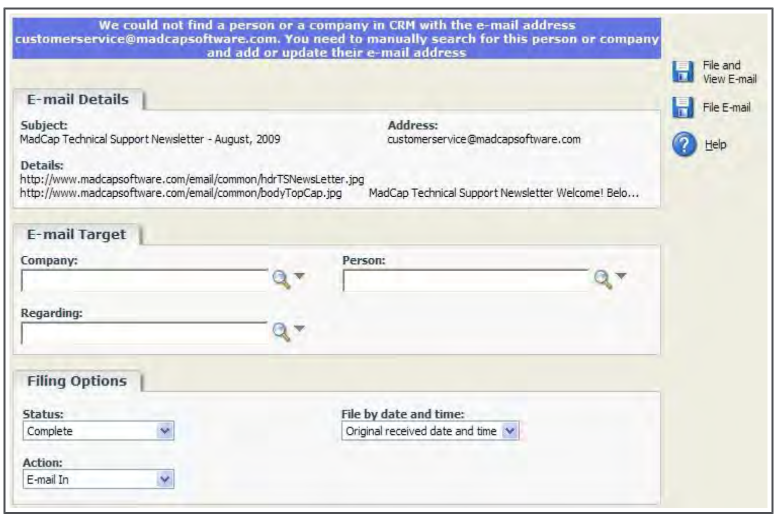
You can file e-mails from any folder in Outlook against records in CRM.

When filing e-mails from Outlook to CRM, the plugin tries to match the e-mail address on the Outlook e-mail with an e-mail address in CRM. You can also select a batch of e-mails 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 e-mail address in the batch you have selected. If no match is found for the first e-mail address, you must manually match the e-mail batch to a record in CRM. When filing batches of e-mails, it is recommended that all e-mails in the Outlook-based batch have the same e-mail address.

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

To file an e-mail from your Inbox:

1. From your Inbox, highlight or select the e-mail you want to file in CRM.
2. Click on the **File E-mail** button when it becomes active. The File E-mail screen is displayed.
3. Use the search select advanced buttons on the screen to specify what records you want the e-mail filed against.



File E-mail screen

4. Check the settings in the Filing Options panel, and change them if you need to.
   - **Status** The current status of the e-mail, i.e. Cancelled, Complete, Pending, or In Progress.
   - **File By Date And Time** Select whether to file the e-mail by the original date and time the e-mail was received or by the current date and time.
   - **Action** The action type under which to file the e-mail, for example, E-mail In, E-mail Out, or Meeting.
5. Click on the**File And View E-mail** action button in CRM. The E-mail In page is displayed. This gives you access to E-mail action buttons in CRM to reply to the e-mail straightaway from within CRM. This automatically logs the reply as a communication record against the customer.
6. The File E-mail button returns you to the e-mail list in Outlook.

7. If you select File And View E-mail for multiple e-mails, the Communications tab of the person you e-mailed is displayed.
8. Select the **Continue** button.

   The list of e-mails in Outlook is displayed. The filed e-mail has a check mark next to it showing it was successfully filed in CRM.

   You also can right-click on your Inbox in Outlook, select Open In New Window, and drag and drop e-mails directly onto the Document Drop icon in CRM (Internet Explorer only). This method stores the whole e-mail 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 e-mail while sending it from Outlook:

1. Log on to CRM from within Outlook.
2. In Outlook, select **New** | **Mail Message**. The new e-mail pane is displayed.
3. Fill in the e-mail address fields.
4. Click on the **Send And File** button. The File E-mail screen is displayed.
5. Use the Advanced Search Select buttons on the screen to specify what records you want the e-mail filed against.
6. Select the appropriate settings in the Filing Options panel.
7. Click on the **File E-mail** action button. The e-mail 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.

To reinstall the Outlook plug-in for Classic Outlook Integration:

1. Select the **Preferences** tab.
2. Click on the **Reinstall CRM MS Outlook Integration** button.

   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. Select **Tools | Internet Options | Settings | View Objects**, then right-click on the CRM Outlook Plug-in file and select **Properties | Version**.

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.

To uninstall the Outlook plug-in:

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

Note: The plug-in cannot be uninstalled when User Account Control (UAC) is enabled in Windows Vista or 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

In this chapter you will learn how to:

- **Download the CRM Plug-in**.
- **Carry out a mail merge**.
- **Carry out a mail merge to multiple contacts**.
- **Upload an image file**.
- **Create a new mail merge template**.
- **Create a quote or order template**.
- **Create a new mail merge template in Microsoft Word**.
- **Upload a local Word document template**.
- **Track documents on the Documents tab**.
- **Retrieve a merged document from the Documents tab**.
- **Add a document to the Documents tab**.
- **Use document drop**.
- **Use the drop files here... area**.
- **Link e-mail correspondence to a customer**.
- **Drop a document into the Documents tab**.
- **Shared Documents**.
- **Access documents in Shared Documents**.
- **Filter Shared Documents**.
- **Add documents to the Shared Documents tab**.
- **Edit documents in the Shared Documents tab**.

Downloading the CRM Plug-in

The plug-in allows you to work with the **Document Drop** feature. It also gives you access to an **Edit Attachment** button on the Document Details panel and in the final step of a mail merge. **Note**: These features are only available when working with CRM in Internet Explorer. The System Administrator can enable/disable access to the plug-in required for Document Drop and Edit Attachment for all users from the Administration area in CRM.

The first time you encounter one of the features requiring the plug-in (for example, the Document Drop icon in your Calendar), you are prompted to download the plug-in.

Follow the instructions provided on-screen. You only need to do this once. If you receive an upgrade, or change machines, you are prompted to download the plug-in again.

Mail Merge Templates

Sample mail merge templates are available from the Shared Templates list. Shared templates are stored on the CRM server and are available to all users. You can create new mail merge templates that are available exclusively to you. Info Managers and System Administrators can create and upload templates available to all users. For details of how to create new mail merge templates, please refer to Creating a New Template and Adding Merge Fields (page 9-4). You can also create mail merge documents with Word document templates you have saved locally. For details of how to do this, please refer to Uploading a Local Word Document (page 9-7).

Carrying out a Mail Merge

To merge an existing template with company and person details:

1. **Find** the prospect you want to send the letter to.
2. Click on the **hyperlink** of the person so that their name appears in the context area of the screen.
3. From the Documents tab, select **Start Mail Merge**. A list of shared templates is displayed.
4. Click the hyperlink of the file you want to merge.
5. From the Edit and Merge Document page you can:
   - Modify the document for this mail merge if you are working with an HTML template. 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 any changes made. You can only save updated templates if they belong to you. Shared templates can only be modified by a System Administrator or Info Manager.
6. Select **Merge and Continue**.
7. From the Complete Merge Process page you can:
   - Deselect or select the **Create Communication** check box. Leaving the check box selected creates a completed Communication record with a link to the merged document. It 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 select the **Save** button on the Complete Merge Process page. **Note**: The ability to use the Active X plug-in is controlled by the System Administrator from Administration | E-mail and Documents | Documents and Reports Configuration.
8. Select **Continue**. If you left the Create Communication check box selected, the Save Merged Document As A Communication page is displayed.
9. Add a **Subject** for the communication, and update any other fields you need to.
10. Select the **Save** button.

A communication record is created to record that a letter was sent out, forming part of the customer's interaction history. The merged document can be viewed as an attachment on the communication record. It can also be viewed from the Documents tab.

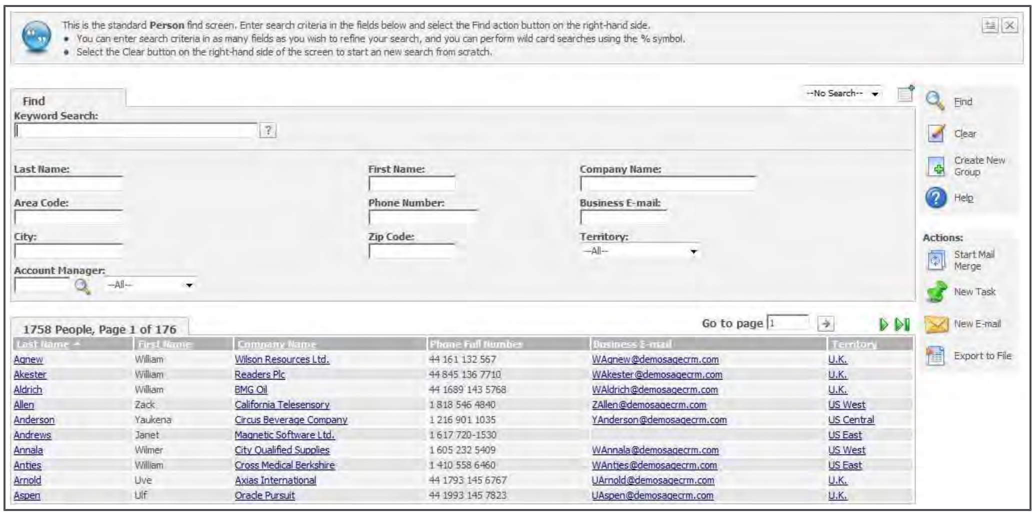
Communication record

Carrying out a Mail Merge to Multiple Contacts

You can create a merged document for all contacts contained in a search list, saved search, or a group.

To perform a mail merge to multiple contacts:

1. Select the **Find** menu button and choose Person from the drop-down list in the context area of the page.
2. Enter the search criteria, and select the **Find** action button from the right-hand side of the page.



Search results page

3. Select the **Start Mail Merge** action button.
4. Click the hyperlink of the file you want to merge.
5. From the Edit and Merge Document page you can:
   - Modify the document for this mail merge if you are working with an HTML template. Add custom text, insert more Sage CRM merge fields, and apply custom formatting.
   - **Preview Merge**. Opens a new browser window. Only the first record will display if you are previewing a mail merge of multiple records.**Note**: You may need to disable any active pop-up blockers to view.
   - **Save Template**. Updates the template with the changes made. You can only save updated templates if they belong to you. Shared templates can only be modified by a System Administrator or Info Manager.
6. Select **Merge and Continue**.
7. From the Complete Merge Process page you can:
   - Deselect or select the **Create Communication** check box. Leaving the check box selected creates a completed Communication record against all of the contacts on your list with a link to the merged document.

- View the merged form letters by selecting the **paperclip** icon. This opens a new browser window. You may need to disable any active pop-up blockers to view.
- **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 select the **Save** button on the Complete Merge Process page. **Note**: The ability to use the Active X plug-in is controlled by the System Administrator from Administration | E-mail and Documents | Documents and Reports Configuration.

8. Select **Continue**. If you left the Create Communication check box selected, the Save Merged Document As A Communication page is displayed.
9. Add a **Subject** for the communication, and update any other fields you need to.
10. Select the **Save** button.

A communication record is created against all of the contacts on your list. A link to the merged document is maintained in the communication record.

Uploading an Image File

If you want to use images when creating your HTML mail merge templates, you must upload those images to the server first.

To insert any uploaded images into an HTML template, type the image name within an HTML IMG tag, for example <img src="logo.png">.

To upload an image when performing a mail merge in the context of a company record:

1. Click the **Find** menu button and select Company from the Find drop-down list.
2. Enter your search criteria and click the **Find** action button.
3. Click on the hyperlink of the company to whom you want to send the merged document.
4. Right-click the **New** menu button and select the **Mail Merge** option, or click **Start Mail Merge** button in the Documents tab. The Select Or Create a New Template page is displayed.
5. Select the **Add Local Template / Image** button.
6. In IE, use the **Browse** button to navigate to the file.
7. For other browsers, select the image file(s) you want to add from their current location. The Details panel is displayed, and the File(s) list shows the image file(s) you have attempted to upload. 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 settings are defined by your System Administrator. **Note**: When using Safari, it is possible to add only one file at a time.
8. Fill in the details of the image file.
9. Select the **Save** button. All valid (green check mark in non-IE) image files are saved. When you have saved the image, you can use it when creating a new mail merge template in Sage CRM.

Creating a New Template and Adding Merge Fields

All users can add new templates for their own use.

To create a new template:

1. Make sure that you are in the **context** you want the template to be associated with. For example, drill into a case record if you want to create a template that uses case merge fields.
2. In the Documents tab, click the **Start Mail Merge** button.
3. Click the **Create Template** button. The Create and Merge Document page is displayed.
4. Enter a name in the File field and, if required, a description in the Description field.
5. Create the main body of your template. You can paste content from Microsoft Word or HTML source code into the rich text editor.
6. Insert any images you want to use in the template by inserting the image name within an HTML IMG tag, for example <img src="logo.png">. Any images you want to use must first be uploaded to the server. Please refer to Uploading an Image File (page 9-4) for more information.
7. Insert CRM merge fields from the **Insert Sage CRM Field** drop-down list.

   If you need a merge field that is not available, make sure that you started the merge in the correct context. If you have checked the context of the mail merge, and still do not have all the merge fields you want, you can ask your System Administrator to customize the mail merge view for the main entity of the mail merge.
8. Click the **Save Template** button. The template is saved in HTML format and is available in the Shared Templates list. When you click the **Save Template** button, a **Delete** button appears. It is possible to delete only templates that you have created using the rich text editor.

   You can now continue with a merge by selecting **Merge and Continue**, or click **Cancel** and carry out a merge with your new template at a later stage. To share your template with other users, save it locally, e-mail it to your System Administrator and have them upload it to the Shared Templates list.

Creating a Quote or Order Template

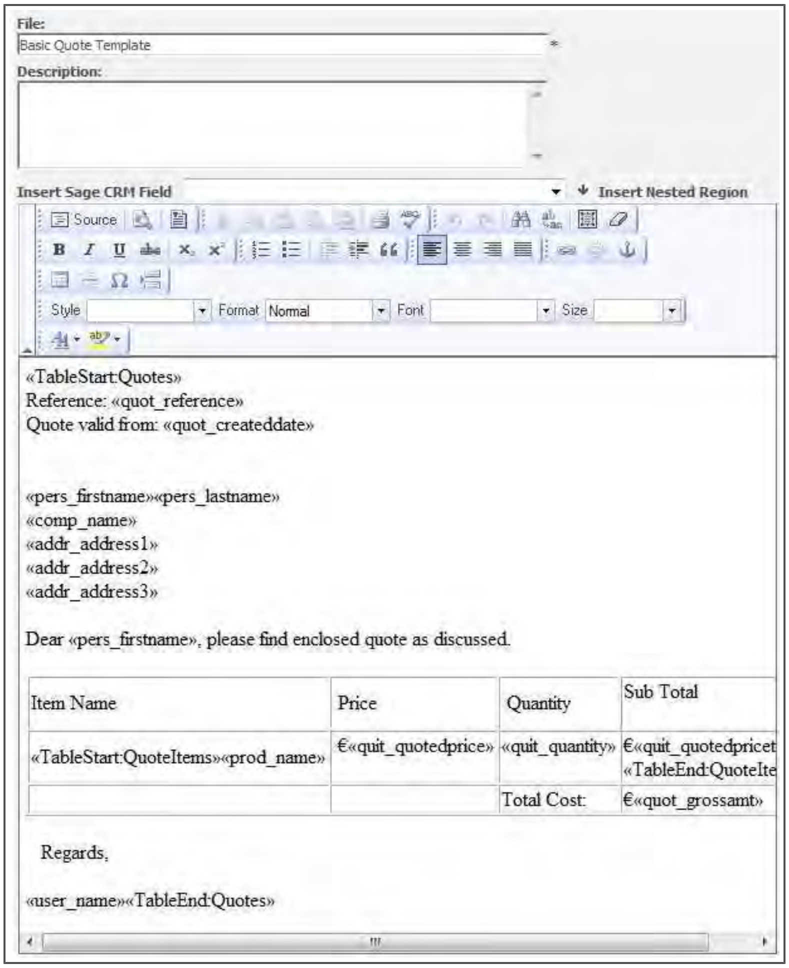
Sample Quote and Order templates are shipped with a standard install. However, you can create your own.

To create a new Quote template:

1. Ensure you are in the Quote **context**.
2. In the documents tab, click the **Start Mail Merge** button.
3. Click the **Create Template** button. The Create and Merge Document page is displayed.
4. Enter a name for the template in the File field and, if you want, a description in the Description field.
5. Create the main body of your template. You can insert Sage CRM merge fields by selecting them from the **Insert Sage CRM Field** drop-down list.

   If you want to include a table with merge fields, click the Insert Nested Region hyperlink. This inserts the start and end tags for both the main table (Quotes) and the child table (Quote Items).

   You must include TableStart and TableEnd in the same template section, table row or table cell. For example, if you want a row of quote item data to display, the first column in that row must include a TableStart:QuoteItems tag, and the final row must include a TableEnd:QuoteItems tag.



Basic Quote Mail Merge Template

6. You can preview how the merged document will look by clicking the **Preview Merge** button.

Note: If you are merging multiple records, the preview will show only the first record in the group.

7. When you are happy with the template, click the **Save** button. The template is saved in HTML format.

Note: All users can create and save templates and merge documents using them. However, you cannot make changes to shared templates. You must be an Info Manager or Administrator to make changes to shared templates.

Creating a New Template in Microsoft Word

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

To ensure the template works properly, all merge fields entered into the template must correspond to the exact field name in Sage CRM. You can check the field name with your System Administrator.

You should only enter merge fields from one primary entity when creating a new template in Microsoft Word. 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.

When you upload it the template, you must associate it with the entity (e.g. Case), for which you have entered merge fields.

To create a new Word template:

1. In the main document, type any content that you want to appear on every copy of the document.
2. To add a picture, such as a logo, click Picture in the Illustrations group on the Insert tab. **Note**: To ensure your logo and text remain formatted correctly during the merge process, we recommend using a table to format your document.
3. Insert the Sage CRM merge fields you want to include in your template. To insert a merge field, click **Quick Parts** in the Text part of the **Insert** tab, then select the **Field** option. The Field dialog box is displayed.
4. Select the **MergeField** option from the Field Names drop-down in the Please Choose A Field panel.
5. Type the Sage CRM merge field name in the Field Name field of the Field Properties panel.
6. When you have finished creating your template, select **File** | **Save As**, give your template a name, and save it. You can save your new template in the following formats: .DOCX file, .HTM, and .HTML.

You can now upload the template and use it to perform mail merges. To share it with other users, e-mail it to your System Administrator and have them upload it to the Shared Templates list.

Uploading a Local Word Document

To upload a local Word document template so you can use it to perform a mail merge:

1. In the context of an entity, go to the **Documents** tab.
2. Select the **Start Mail Merge** button. The Select or Create a New Template page is displayed.
3. Select the **Add Local Template / Image** button.
4. In IE, use the **Browse** button to navigate to the file.
5. For other browsers, select the file you want to add from its current location. The Details panel is displayed, and the File(s) list shows the document you have attempted to upload. The green check mark and red cross icons indicate whether the file uploaded or not. To upload successfully, the file must comply with the system file size, type, and number of files settings. These are defined by your System Administrator.
6. Fill in the details and add a brief description of the document.
7. Select the context you want the template to be associated with from the **Entity** drop-down. Select the person record, for example, if you want to add more person merge fields to the template.
8. Click on the **Save** button. The Word document is saved as a new template for you to use when performing a mail merge.

Tracking Documents in 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 e-mails, 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 are in.

The Documents tab is available within the context of a:

- Company
- Person
- Opportunity
- Case
- Solution
- Quote
- Order
- 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

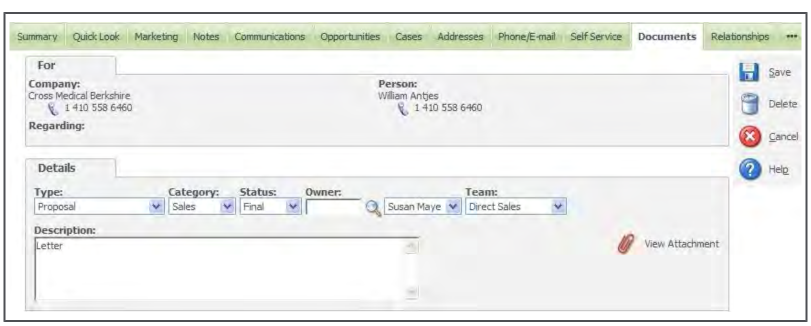
If you sent out a letter to a customer using the Merge Document functionality, setting the Create Communication and Save Document letter options to Yes in the process, a copy of the merged document is automatically attached to the communication record and stored in the Documents tab.

You can view the document from:

- The **Communication** record, by selecting the View Attachment button
- The Documents tab, by selecting the View Attachment icon directly from the **Documents** tab
- The **Document record**, by opening the document entry and selecting the View Attachment button

To view the attachment from the Document record:

1. Find the customer you sent the letter to.
2. Click on the **hyperlink** link of the person so that their name appears in the context area of the screen.
3. Select the **Documents** tab. A list of all document entries for the person is displayed.
4. Click on the **hyperlink** of the Documents entry you wish to review. The Document Details page is displayed. The **View Attachment** button works the same way as in the Communication Details page. Clicking on it opens up the document in a new browser window. Alternatively, you can select the **View Attachment** icon in the left-hand column of the list of documents. This opens the document without having to drill into the document entry details first.



Document Details page

Add a Document to the Documents Tab

You receive a "Request for Information" from a prospective customer. At present, you have the document saved on your local hard drive. To link this document to the prospect and make it available for others to look at, you can create a new library entry within the context of the prospect company.

To add the document to the company Documents tab:

1. **Find** the company.
2. Click on the **hyperlink** of the company.
3. Select the **Documents** tab. A list of existing Documents entries for the company is displayed.
4. Select the **Add File** button.
5. In IE, use the **Browse** button to navigate to the file.
6. For other browsers, select the file(s) you want to add from their current location. The **Details** panel is displayed, and the **File(s)** list shows the file(s) you have attempted to upload. 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. **Note**: When using Safari, it is possible to add only one file at a time.
7. Select **Add File** to add more files.
8. Fill in the details and add a brief description of the document(s).
9. Select the **Create Communication** check box if you want a new completed communication record to be automatically created when the Documents entry is saved.
10. Click on the **Save** button. All valid (green check mark in non-IE) files are saved as Document entries. If you selected the Create Communication check box, you also see the completed communication record on the company Communications tab, and the document entries can be accessed from the Attachments tab within the communication.

Document Drop

The Document Drop feature provides a short cut for linking documents, e-mails, or any* type of file from another application to customer data in CRM. Also, if the document is dropped onto the icon in any of the communication lists, you can select an option 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.

Note: The Document Drop icon is only available when working with CRM in Internet Explorer. The System Administrator can enable/disable access to the plug-in required for Document Drop for all users from the Administration area in CRM. For Chrome and Firefox users, similar functionality is available using the **Drop File Here... area**.

The Document Drop icon is available in:

- 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 CRM.

Drop Files Here... area

Note: The Drop Files Here... area is not available when working with 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 the **Add File** button.

Drop Files Here... is available in:

- Any **Documents** tab. For example the Documents tab within the context of a company.
- The **Attachments** tab within the context of a task.
- The **Select Or Create a New Template** screen when performing a mail merge.
- My CRM | **Shared Documents** if you are a System Administrator or Info Manager with Document Library rights.
- Administration | E-mail 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 E-mail Correspondence to a Customer

You have just received an e-mail from a customer regarding a new project you are working on. This forms a vital part of the customer interaction history.

To link this correspondence to the customer using Document Drop (IE only):

1. **Find** the customer.
2. Click on the **hyperlink** of the person.
3. Select the **Communications** tab. A list of communications with this person is displayed. You will also notice the Document Drop icon on the right-hand side of the page.

4. You can drop the e-mail onto the icon by: tiling the windows on your desktop and, using the mouse, dragging the e-mail onto the Document Drop icon. The Enter New Task page is displayed.
5. The Action type is automatically set to E-mail In. Enter the rest of the details and select the **Save** button.

The new communication is displayed in the Communications list of the company. If you click on the E-mail icon of the communication, the Communication Details page is displayed. Select the View Attachment button to review the e-mail.

Remember, other options for linking e-mail correspondence to customer records in CRM include:

- **Outlook Integration**. If you have Classic Outlook Integration installed on your system, you can use the File E-mail button from Outlook to file an inbound e-mail communication with the customer record in CRM. Please refer to Classic Outlook Integration (page 8-1) for more information.
- **E-mail Management**. If E-mail Management is set up on your system, inbound e-mails can automatically get filed against the matching person or company record. Please refer to Filing Inbound and Outbound E-mails (page 6-5) for more information.

Dropping a Document into the Documents Tab

To drag and drop a document into the Documents tab:

1. **Find** the company.
2. Click on the **hyperlink** of the company.
3. Select the **Documents** tab. A list of existing Documents entries for the company is displayed.
4. Reduce the size of your CRM window.
5. Click and drag the document from, for example, your desktop, onto the **Document Drop** icon (IE only). In Chrome and Firebox browsers you can drag single or multiple files to the **Add File** button or the **Drop files here...** area. In Safari you can drag single files to the **Add File** button. The Documents Details panel is displayed.
6. Enter the document details and click on the **Save** button. The Documents list displays the new documents entry (or entries).

Shared Documents

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

You need to be a System Administrator or an Info Manager with Document Library rights to add new documents to the Shared Documents tab.

Accessing Documents in Shared Documents

To access documents in Shared Documents:

1. From within **My CRM**, select the **Shared Documents** tab. A list of documents is displayed.
2. Click on the **View Attachment** icon next to the file you want to open, or select the document **hyperlink** and then click the View Attachment button from the Document Details screen.

Filtering Shared Documents

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

For example, you may need to quickly locate a sales letter but are unsure which one exactly.

To filter the Shared Documents list:

- Select, for example, **Letter** from the **Type** drop-down list.
- Select the **Filter** action button. When you do this only documents of type Letter are displayed on the list, which makes it easy to find the letter you need.

Adding Documents to the Shared Documents Tab

Only Administrators and Info Managers (with Document Library rights) have rights to upload documents to the Shared Documents tab.

To upload a document:

1. From within **My CRM**, select the **Shared Documents** tab.
2. Select the **Add File** button.
3. In IE, use the **Browse** button to navigate to the file.
4. For other browsers, select the file(s) you want to add from their current location. The **Details** panel is displayed, and the **File(s)** list shows the file(s) you have attempted to upload. 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. **Note**: When using Safari, it is possible to add only one file at a time.

Document details page (IE)

5. Select **Add File** to add more files.
6. Specify the type of document you are about to upload and other details, such as which teams can view it and whether it is associated with a particular entity.
7. Click on the **Save** button. All valid (green check mark in non-IE) files are saved as Shared Document entries The document(s) become available from the Shared Documents tab to all users, who have the selected team as either their Primary or Display Team.

User Requirement: Info Manager with Document Library Rights

Editing Documents in the Shared Documents Tab

Only Administrators and Info Managers have rights to modify documents already uploaded.

To edit documents in the Shared Documents tab:

1. From within **My CRM**, select the **Shared Documents** tab.
2. Locate the document you wish to edit and click on the hyperlink to open it.
3. Click on the **View Attachment** button to open up the attached document, and **Save** it locally.
4. Make the document changes you require and **Save** them.
5. Ensuring that you make a note of the document details, return to CRM and delete the existing document using the Delete button. You are returned to the list of documents.
6. Select the **Add File** button to begin uploading the updated document.
7. Select **Save**. Users can now access the updated document from within My CRM | Shared Documents.

User Requirement: Info Manager Administration Rights

Chapter 10: Running Reports

In this chapter you will learn how to:

- **Find the sample reports available in the system**.
- **Run list, cross tabular, historical, and summary reports**.
- **Save report search criteria**.
- **Add favorite reports**.
- **Change the report display options**.
- **Interact with report charts**.

Sample Reports

A standard installation includes sample reports in the following categories:

- Activity
- Communications
- Customer Service
- General
- Lead
- Marketing
- Sales
- Administrator
- Campaigns
- Outbound Calls

Running a Report

There are three types of standard report:

- **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, which show a quick overview of account information, are available from the Summary tabs of:

- Companies
- People
- Opportunities
- Cases

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

Example: Company List by Segment (List)

This report shows a simple list of companies in selected industry segments. For example, all companies in the Computer - Software segment. To run the report:

1. Select the **Reports** button. The Reports page is displayed.
2. Select the **General** report category.
3. Click on the **hyperlink** of the report called Company List by Segment or select the **Run** button. The Display Options and Search Criteria page is displayed.

Report Display Options and Search Criteria page

4. The default display option is to display the report output on-screen. Leave the on-screen option selected for this example.
5. Select the criteria for the report. If you leave the search criteria blank, the default is set to match all the permitted values. To select multiple criteria on the right-hand side of the panel, hold the Ctrl key and select the individual entries.
6. Click on the **Go** button. The Company List by Segment report is displayed in a new window. The Search Criteria are displayed at the top of the report output. The report output page may contain hyperlinks from the data to the corresponding Summary page. If it does contain hyperlinks you can, for example, select a company name from the report output page and you are taken to the Summary page of that company.

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

7. You can navigate between pages of a longer report using the navigation buttons at the top of the page. The first page of the report is displayed as soon as it is generated, with arrows at the top to go to the next or last page. If you click on the next or last page buttons before those pages have been generated, a message is displayed to inform you that the page is not ready. Once the whole report has been generated, a Go To Page icon is displayed at the top of the page, and 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.

Report navigation buttons

8. To close the reports page, close the window displaying the report output.

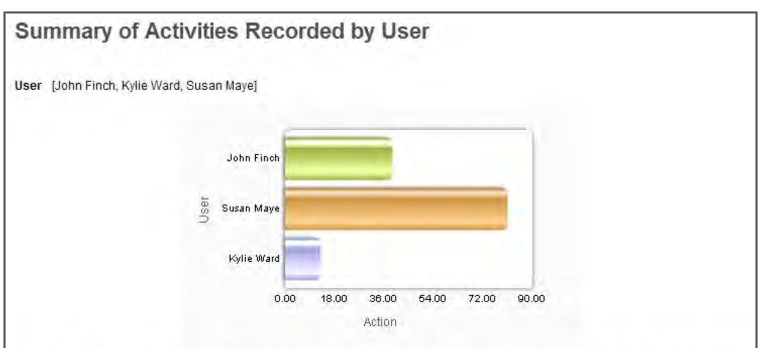
Example: Activities Logged Report by User (Cross Tab)

This report shows the number of different 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. Select the **Reports** button. The Reports page is displayed.
2. Select the report category Activity Reports.
3. Click on the **hyperlink** of the report called Activities Logged Report by User, or select the Run button. The Display Options and Search Criteria page is displayed. The search criteria are combined with logical "AND"s—that is, only activities meeting both the Date/Time and User criteria are returned.

Display Options and Search Criteria page

4. Select the criteria for the report. For the Date/Time Search Criteria, you can choose several different 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 on the **Go** button. The report output is displayed in a new window. This report includes a chart graphic.



User	Demo	E-mail Out	Letter In	Letter Out	Meeting	Phone In	Phone Out	To Do	Vacation	Total
John Finch	7		1	6	7		15		2	38
Susan Maye	5		1	11	13	5	41	4	1	81
Kylie Ward		1			1		11			13

Report output page

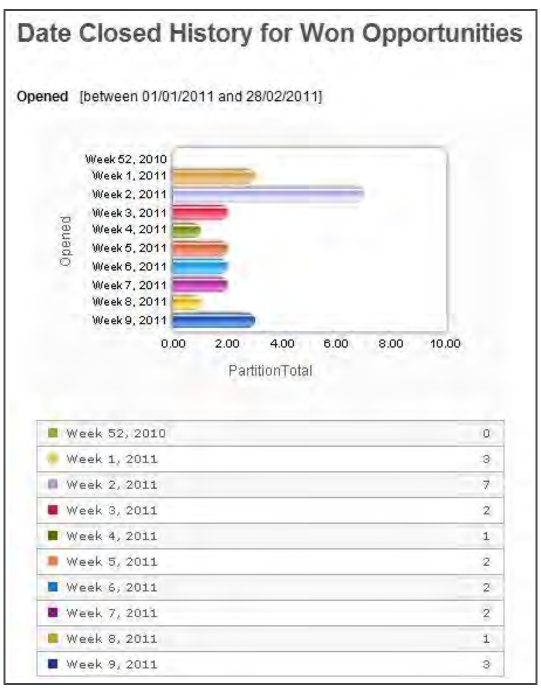
Example: Opportunity Closing History (Historical)

This report shows opportunities that were opened during the specified time period, for example, 1st July to 31st July. A further search criteria of Opportunity Status can be added to show, for example, all opportunities opened between 1st July to 31st July, which were subsequently Won during that time period or after. To run the report:

1. Select the **Reports** button. The Reports page is displayed.
2. Select the **Sales** report category.
3. Click on the **hyperlink** of the report called Opportunity Closing History or select the **Run** button. The Display Options and Search Criteria page is displayed.

Display Options and Search Criteria page

4. Select the criteria for the report.
5. Click on the **Go** button. The report output is displayed in a new window. 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.

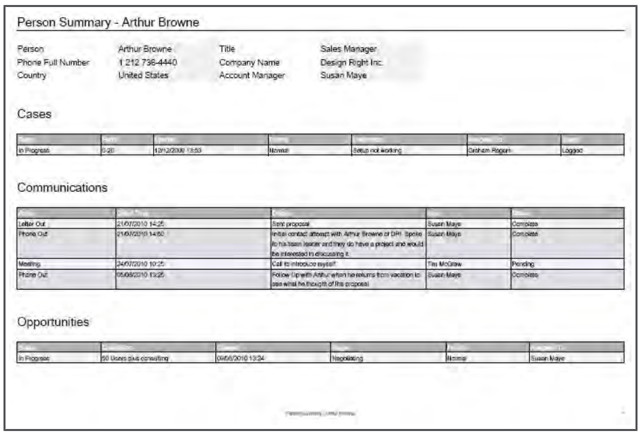


Report output page

Example: Person Summary Report

You’re off to meet Arthur Browne from Design Right, and want a quick one pager on all recent activities and key contact details. To run the report:

1. Right-click on or hover over the **Find** menu button, and select Person.
2. Type in Arthur’s details, and select the **Find** action button.
3. Click on the hyperlink of the person you want to report on.
4. Select the **Summary Report** action button. The person’s summary details are displayed in an Adobe PDF file.



Person Summary report

5. Select the **Print** icon to print this out and take with you to the meeting.

Example: Exporting a Company List from a Search List

If your System Administrator has given you the rights, you can quickly create a list report in CSV or Text file format from any search list, saved search, or group.

To export a company list from a search list:

1. Select **Find** | **Company** and search for, for example, all companies in the system that are assigned to you and are located in Dublin city.
2. Select the **Export To File** action button.
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.

Export File Options screen

4. Select the **Save** button. 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—for example, monthly activity report for Damien, John, Kylie, and Susan—you can save and re-use the search criteria selected. To save reporting search criteria:

1. Select the **Reports** button.
2. Select a report category from the context area of the screen. For example, Activity Reports.
3. Click on the **Run** button next to the report you want to run. For Example, Activities Logged Report by User. The Display Options and Search Criteria page is displayed.
4. Select the search criteria, and click on the **Save** button. You are prompted to enter a name for the Saved search. Selecting the Available to All Users check box will make the saved search available to all users.

Saved Search dialog box

5. Enter a short description for the search, for example, **Telco Team Monthly**, and select the Save button. When you return to the list of reports, the saved search criteria is displayed in a list next to the report.

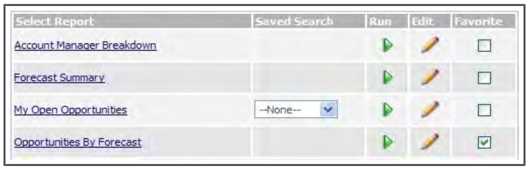
Saved Search

To run the report using the saved search criteria, click the Run button next to the saved search name. To edit a saved search, select it from the Saved Search column, click on the Run button, make the changes you require and click on the Save button. To delete a saved search, select it from the Saved Search column, click on the Run button and click on the Delete button.

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. Select the **Reports** menu button. The page of existing report categories is displayed.
2. Select the category where your favorite report is.
3. Select the **Favorite** check box next to the report you want to add to the My Favorite Reports category.



Sales Reports list

4. To view your favorite reports, select the **My Favorite Reports** category. A list of all reports you have marked as Favorites is displayed.

Changing the Report Display Options

You can display a report in the following formats:

- **On-screen** in CRM.
- As an Adobe **PDF** file.
- **XLSX**. Exports the data to an .XLSX file. Compatible with Excel 2007 and 2010. 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"

- **CSV**. Exports the data to a CSV file. The data is delimited according to the CSV File Export Delimiter set at System and User level. If the file is opened in MS Excel, it may not be formatted correctly. You can either: open it in Notepad, use the CSV Excel option, or open in MS Excel and convert the formatting (for example, using the Text To Columns option).

Find out more on the following report display options:

Adobe PDF (page 10-7)
XLSX (page 10-9)
Excel CSV (page 10-9)
CSV (page 10-9)

Adobe PDF

To display report output in Adobe PDF format:

- Select the **Print Preview** option from the Display Options panel.

The output is displayed in Adobe PDF format.

Company List by Segment

Segment [Computers - Software]

Company Name	Person	Title	Address 1	Address 2	Address 3	City	Zip Code	Country	Phone	Website	Account Manager	Segment
A Post	Clive Stevens	Business Solutions Manager	Suite 17	London Fruit & Wool Exchange	Brushfield Street	LONDON	W1 6HB	United Kingdom	44 207 894 1567	http://www.APost.co.uk	Peter Johnson	Computers - Software
A.B.B. (Hellas) Systems Ltd	Clive Stephens	Business Strategy Director	217 Macleilen Street	Kinning Park		GLASGOW	G41 1RR	United Kingdom	44 141 890 2344	http://www.ABBHellas.co.uk	Matthew Ebden	Computers - Software
A.I.G. Office (UK) Ltd	Clive Stein	Business Systems Designer	2nd floor Tower Bridge Court	224-226 Tower Bridge Road		LONDON	SE1 2TX	United Kingdom	44 207 887 9567	http://www.AIGOffice.co.uk	Matthew Ebden	Computers - Software
Accantia Ltd.	Craig Sobotka	Chairman	Geoffrey House	Vanwall Business Park	Vanwall Road	MAIDENHEAD	SL6 4UB	United Kingdom	44 1423 862 1704	http://www.Accantia.co.uk	Peter Johnson	Computers - Software
Access Office	Craig Snape	Chairman	C P House	Otterspool Way		WATFORD	WD25 8HG	United Kingdom	44 1923 862 218	http://www.AccessOffice.co.uk	Matthew Ebden	Computers - Software
Accord (Holdings)	Cyril Smythe	Chairman	Mill Lane	Wingerworth		CHESTERFIELD	S42 6NG	United Kingdom	44 1246 868 2774	http://www.AccordHoldings.co.uk	Matthew Ebden	Computers - Software
Allders Plc Ltd.	David Sledmore	Chairman	Lanelay Road	Talbot Grn		PONTYCLUN	CF7 8XX	United Kingdom	44 1443 820 2567	http://www.AlldersPlc.co.uk	Peter Johnson	Computers - Software
Allied Plc	David Skinner	Chairman	Parker Tower	43-49 Parker Street		LONDON	WC2V 5PS	United Kingdom	44 207 818 3900	http://www.AlliedPlc.co.uk	Matthew Ebden	Computers - Software
Allied Technologies	David Singh	Chairman	Cambane Housse	Sheapards Way		CO DOWN	BT35 6EE	United Kingdom	44 28 816 5567	http://www.AlliedTechnologies.co.uk	Matthew Ebden	Computers - Software
American Images	James Napier	Deputy Account Manager	400 One Norwegian Plz			Pottsville	17901	United States	1 570 622 6406	http://www.AmericanImages.com	Wayne Parcells	Computers - Software
American Newstar Inc	Roelof Piggott	Marketing Manager	200 Fleet St Ste 5			Pittsburgh	15220	United States	1 412 928 1068	http://www.AmericanNewstarInc.com	Wayne Parcells	Computers - Software
Arnold Services Ltd	David Shaw	Chairman and Managing Director	Chelsea and Westminster Hospital	369 Fulham Road		LONDON	SW10 9NH	United Kingdom	44 208 778 6567	http://www.ArnoldServices.co.uk	Matthew Ebden	Computers - Software
Atlanta Products	Julio Talpash	Deputy Director	201 Plaza Three	Shore Side Financial Center		Jersey City	07311	United States	1 201 938 5657	http://www.AtlantaProducts.com	John Finch	Computers - Software

Adobe PDF Output

Note: 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 are 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 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.

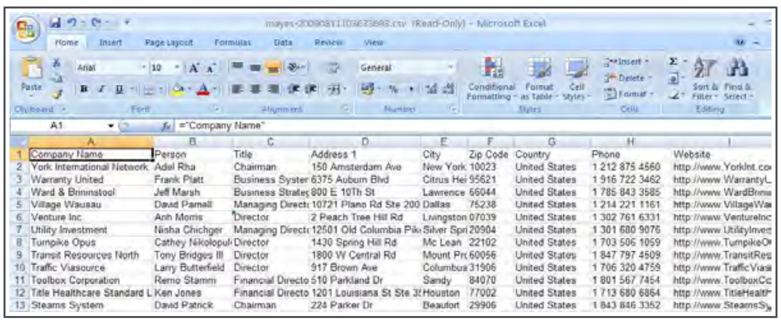
  Note: If you want to view CSV in Excel then this is the correct option to select (not the CSV option).

CSV

To display report output in Comma Separated Value (CSV) format:

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

  The output is displayed in a CSV format.



CSV Format

Interacting with Report Charts

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

You can view the charts either by running the report from the Reports menu button, from a chart gadget on the Interactive Dashboard, or on the Classic Dashboard - just make sure that, for the report you are running, the Show Chart option is selected on the Report Options, Step 2 of 2 page. Please refer to Writing Reports (page 23-1) for more information.

The built-in animation means you can watch, for example, the bars of a horizontal bar chart grow as the chart is drawn. And you can 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 on a slice of the pie chart to highlight it.
3. To rotate the pie chart, right-click on the chart and select Enable Rotation, then click and drag the chart to its new position.

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

Chart Display Options with the Adobe Flash Player

The Adobe Flash Player is not required for either running or interacting with report charts. Some enhanced display options, such as greater depth of color, are available in charts when the Adobe Flash Player is installed on the client machine. If Flash is not 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** web site.

Chapter 11: Working with Lists

In this chapter you will learn how to:

- **Send a mail shot**.
- **Schedule calls to a contact list**.
- **Send an e-mail to a list**.
- **Export a file**.

Introduction to List Actions

You can send out a mail shot or schedule several calls in a single action by using the Action buttons, which appear on the right-hand side of Search lists, Saved Searches, and the My CRM | Contacts list.

This section explains how to use these actions.

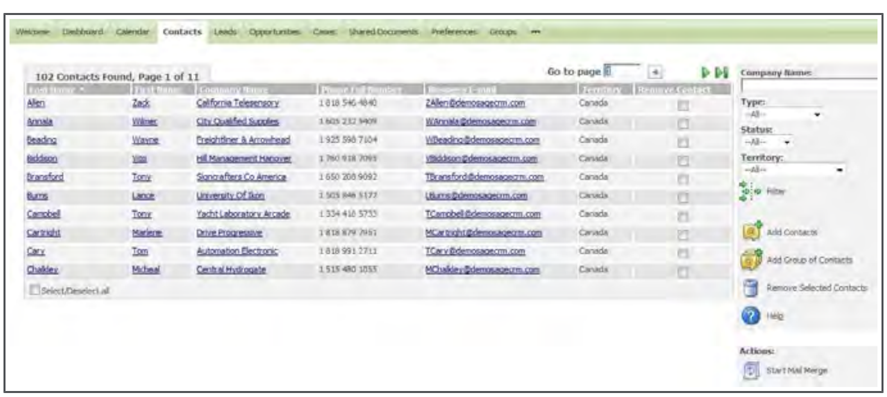
More advanced ways of carrying out multi-recipient actions on lists are available using the Groups and Campaign Management functionality. Please refer to Campaign Management (page 17-1) and Groups (page 16-1) for more information.

Start Mail Merge

This example shows you how to send a mail shot to all the people in the My CRM | Contacts tab.

To send the mail shot out:

1. Select **My CRM**, then click on the **Contacts** tab. If the Contacts list is empty, select the **Add Contacts** or **Add Group Of Contacts** buttons to add people to the list.
2. Once you have a list of contacts in the Contacts tab, select the **Start Mail Merge** action on the right-hand side of the page. A list of Shared templates is displayed. **Note:** The Mail Merge button available from the New menu button on the left-hand side of the page merges a single contact's details with a document template. The actions on the right-hand side of the screen will merge the document for all contacts in the current list.



Start Mail Merge action button

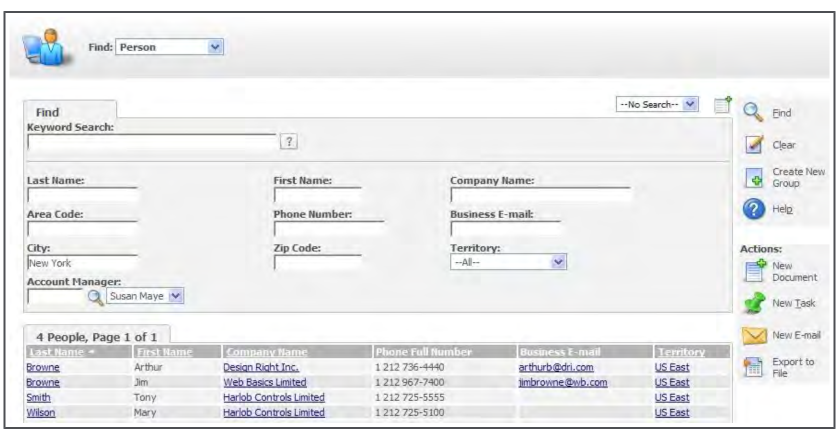
3. Click the hyperlink of the template you want to use for this mail shot. The Edit and Merge Document page is displayed. If you are working with an HTML template, you can make changes to the template before you merge.
4. Make any changes you want to the template. You can insert Sage CRM merge fields by selecting them from the Insert Sage CRM Field drop-down box. **Note**: You can click the Preview Merge button to preview how the merged document will look.
5. When you are happy with your merged document, click the **Merge and Continue** button 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 wish.
7. Return to CRM and complete the Communication details. 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 where you are the Account Manager, and the where the contact is based in New York. This is carried out using the results of a search on the Person list.

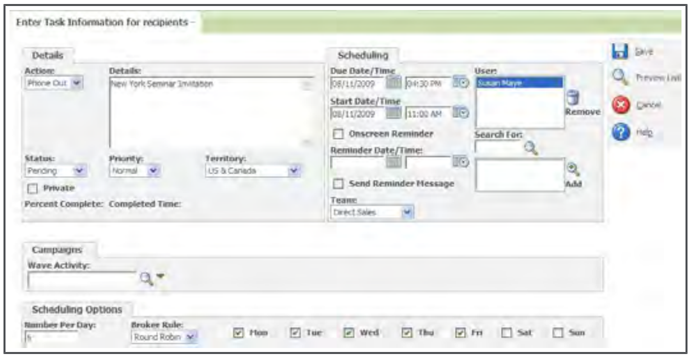
To schedule the calls:

1. Right-click or hover over the **Find** menu button, and select **Person**. The person Find page is displayed.
2. Type in the search criteria, for example, **New York** in the City field, and your name, for example **Susan Maye**, in the Account Manager field.
3. Select the **Find** action button on the right-hand side of the screen. A list of people matching the search criteria is displayed. A new set of action buttons are also displayed on the right-hand side of the page. **Note:** You can also run actions on lists generated from Saved Searches. For more information Saved Searches, please refer to Finding Information (page 3-1).



Search results and Action buttons

4. Select the **New Task** button on the right-hand side of the screen. **Note:** The New Task button available from the New menu button on the left-hand side of the page merges a single contact's details with a new task. The actions on the right-hand side of the screen will create a new task for each contact in the current list. The Enter Task Information page is displayed.



Enter Task Information page

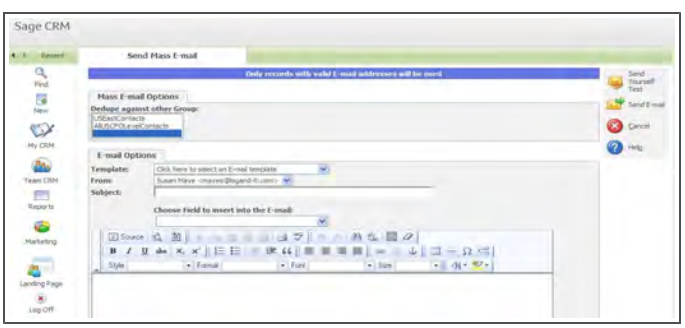
5. For details of all the fields on this page, except for the Scheduling Options, refer to Scheduling a Callback (page 5-2). For details of the Scheduling Options refer to Scheduling an Internal Telesales Activity (page 17-9).
6. Complete the information for the scheduled task, and select the **Save** button. Pending tasks are displayed in the Calendar tab of the user they are scheduled for.

Send E-mail

This example shows you how to send an e-mail 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, please refer to Creating a New Saved Search (page 3-13).

To send the e-mails:

1. Right-click or hover over the **Find** menu button, and select **Person**. The person Find page is displayed.
2. Retrieve the Saved Search list by selecting the list from the drop-down list at the top right-hand side of the Find page. A list of people matching the saved search criteria is displayed. A new set of action buttons are also displayed on the right-hand side of the page.
3. Select the **New E-mail** button on the right-hand side of the screen. **Note:** The E-mail button available from the New menu button on the left-hand side of the page merges a single contact's details with an e-mail. The actions on the right-hand side of the screen will send an e-mail to each contact in the current list. The Send Mass E-mail page is displayed. All the fields on this page are explained in Sending E-mails to Groups (page 16-18).



Send Mass E-mail page

4. Complete the information for the e-mail blast, and select the **Send E-mail** button. The e-mails are sent out, and a link to the communication record is stored against each person on the list. The e-mail 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 are the Account Manager, based on a Saved Search. For more information on Saved Searches, please refer to Creating a New Saved Search (page 3-13).

To export the list of companies:

1. Right-click or hover over the **Find** menu button, and select **Company**. The company Find page is displayed.
2. Retrieve the Saved Search list by selecting 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 on the right-hand side of the page.
3. Select the **Export To File** button on the right-hand side of the screen. The Export File Options page is displayed.

Export File Options page

4. Choose how you would like the output of the export to appear. Select from **CSV**, **Excel CSV** or **Text**. The default is CSV.
5. Select the **Save** button. The output is displayed in spreadsheet format in a new browser window. From the new window, you can review the information and save by selecting **File** | **Save As**. You can also access the exported file from the My CRM | Shared Documents tab.

Chapter 12: Sales Opportunities

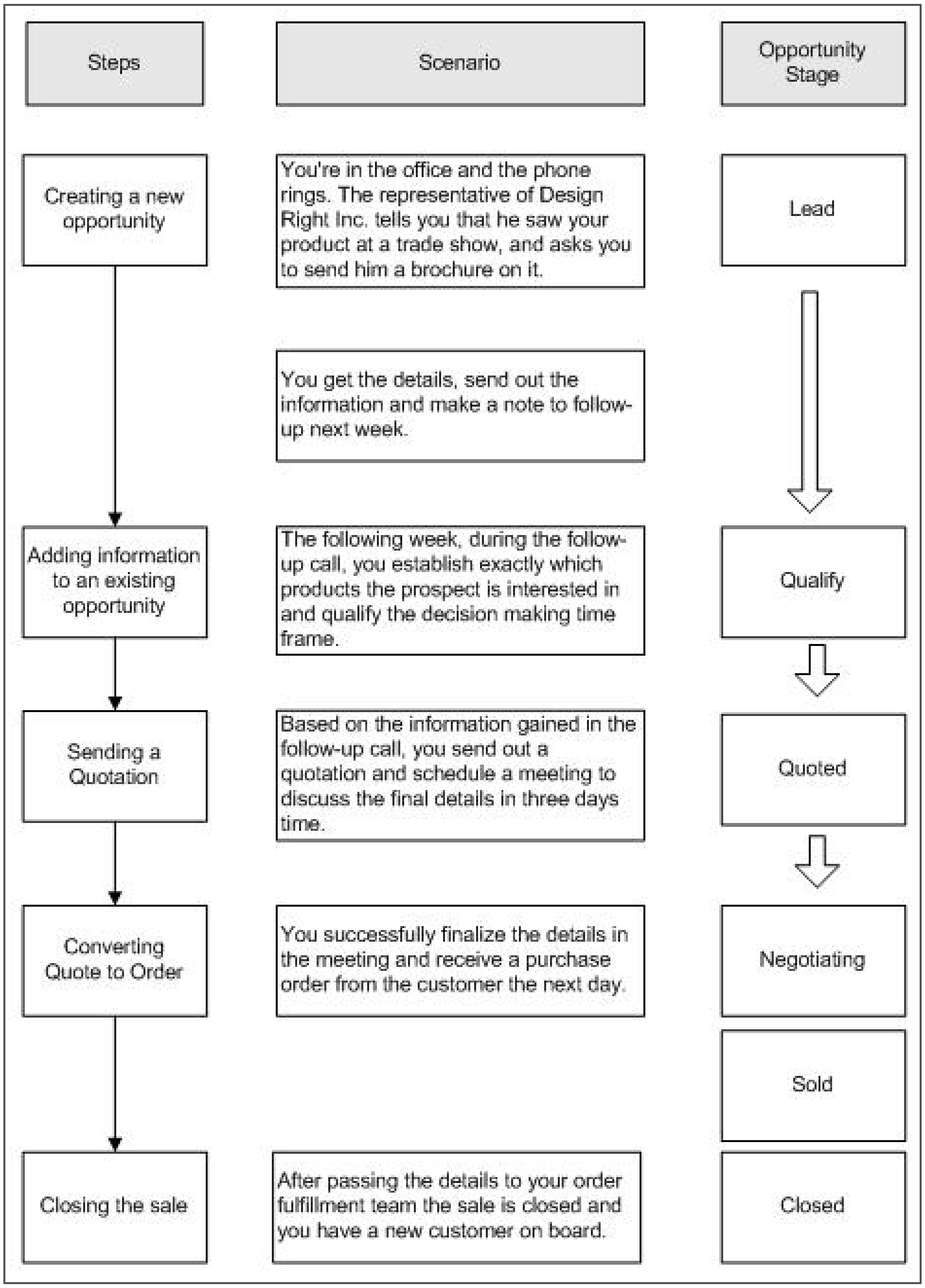
In this chapter you will learn how to:

- **Define what an opportunity is**.
- **Create a new opportunity**.
- **Understand the fields on the opportunity screen**.
- **Understand the opportunity status icons**.
- **Add information to an existing opportunity**.
- **Record product interest**.
- **Progress an opportunity**.
- **Send a quotation from within the opportunity**.
- **Turn a quote into an order**.
- **Print an order**.
- **Progress opportunities through the sales cycle to closure**.
- **View the sales pipeline**.
- **Run an opportunity report**.
- **Find out what opportunities I am working on**.
- **Create an opportunity from other contexts**.
- **Delete and opportunity**.
- **Create quotes and orders outside the opportunity context**.
- **Find a quote**.
- **Find an order**.

What is an Opportunity?

An Opportunity in CRM is a Sales Opportunity. An opportunity can be created either directly by a Sales Representative or from the conversion of a marketing lead into an opportunity.

Closing a Sale: Scenario



Opportunity Fields

This table explains the fields on the New Opportunity page:

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, please refer to Territory Management (page 4-7).
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.
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.
Priority	Priority. For example, Normal, Low, High.
Assigned To	Person responsible for the sale.

Field	Description
Team	Team responsible for the sale.
Close By	Forecast close date.
Total Quote Value	Read-only field. Gross Amount from the quotes associated with this opportunity where the Include In Quotes Total check box has been 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 will be 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 check box 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.

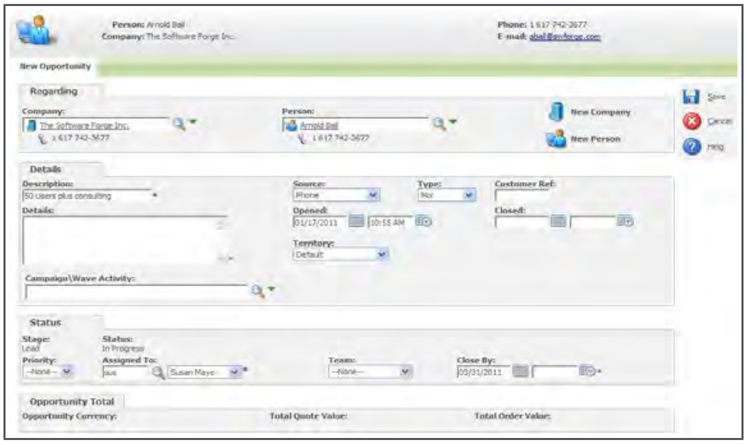
This table shows the Opportunity Status icons.

Status Icon	Description
	In Progress
	Won
	Lost

Creating a New Opportunity

To create a new opportunity:

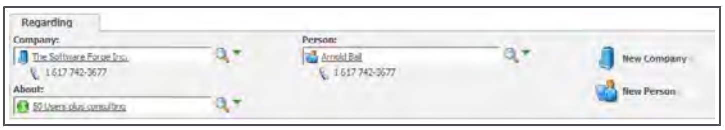
1. Find the prospect. If they are new to your database, you first need to create a new company.
2. Click on the **hyperlink** of the company, and select the Opportunities tab.
3. Click on the **New Opportunity** button, and add all the information you are aware of at this stage to the opportunity details.



New Opportunity page

4. Select the **Save** button.

   The new opportunity is displayed as the current context showing the Opportunity Summary page. You can right-click on or hover over the New menu button and select Task to schedule the follow-up call for next week. You will notice that the task is automatically linked to the opportunity in the About field.



Task associated with Opportunity

Adding Information to an Existing Opportunity

Find out more about adding information to an existing opportunity in:

Products (page 12-5)
Progressing an Opportunity (page 12-9)

Products

During a conversation with a prospect, you find out exactly which products they are interested in and discuss prices.

To capture this information:

1. Within the context of the Opportunity, select the **Quotes** tab.
2. Click on the **New** button.

New Quote page

3. Add the information on the New Quote page. The fields are described in the table below.

Field	Description
Currency	Currency of the quote. The quote currency is displayed in the preferred currency of the logged on user. The currency can only be changed if 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 will be changed to the same currency.
Pricing List	Select the Pricing List that the quote is to be based on. This is a mandatory field, and the Default Pricing List will be selected automatically if the user does not select an alternative.
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 to 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	Toggles the inclusion of the quote in the Total Quote Value field on the Opportunity. You can set one or more quotes to be included 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 determined 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.

The Quote level discount fields are:

Field	Description
Discount Type	Select from Percentage or Amount.
Discount Percentage	Percentage discount on the whole quote. Discounts will be rounded to the system setting for decimal places. If the Discount Type has been 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 will be calculated according to the percentage entered in the Discount Percentage field.

Note: It is possible to add a discount on a quote or order, which has no line items. You may wish to do this if:

- you want to raise a credit note, or
- for example, you have agreed to give a customer "$10 off every order". This means you can add the $10 as a discount before the customer has decided on the products.

4. Select the **Next** button. The New Line Item panel is displayed.

New Line Item panel

5. Enter the information in the New Line Item panel. The fields are explained in the table below.

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 will narrow down the products to select from 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

Field	Description
	sell pens as singles and in packs of 24 or 36. The System Administrator can set up a UOM family for "Pen Packs", and then UOMs as Single, 24-pack, and 36-pack. If the System Administrator has not enabled Units of Measure, then this field is not displayed.
Quantity	Quantity of the product. If UOMs are being used, then this is the quantity of the UOM.
List Price	Standard price of the product. If UOMs are being used, then this is the standard price the UOM. This is a read-only field.
Quoted Price	Defaults to the List Price for a quantity of one—of a product or of a UOM. This field can be edited to discount line items.
Line Item Discount	Read-only field. Calculated by subtracting the Quoted Price from the List Price, and multiplying by the Quantity.

6. Select **Save and New** to add the next line item, or **Save** to add the line item and quit the New Line Item panel.

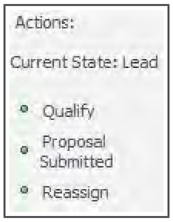
When you have finished adding the line items, you can:

- **Change Summary.** Gives you access to the Quote Summary panel and to the Line Items discount area.
- **New Line Item**. Enables you to add further line items to the quote.
- **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 quote.
- **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 resequenced. Comment line items will be included on the printed quote.
- **Clone**.Creates a new quote based on the existing quote information.
- **Convert.** Changes the quote into an order.
- **Start Mail Merge.** Mail merges the quote with a quote template document.
- **Add This Record To A Group**. Adds the quote to an existing group of quotes to use, for example, as part of a mailing action. Please refer to Groups (page 16-1) for more information.

Note: When editing a line item, you cannot change the Product or Product family.

Progressing an Opportunity

If your system has Opportunity Workflow enabled, you will see a number of workflow buttons on the right-hand side of the Opportunity Summary page. The workflow buttons available to you will vary depending on how the opportunity workflow has been set up and customized to suit your sales process.

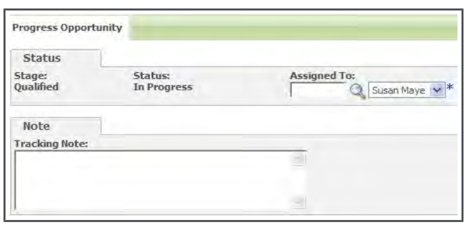


Workflow buttons

You can record the qualification information received from the prospect against the opportunity within the sample opportunity workflow in the system.

To progress the opportunity:

1. Select the **Qualify** workflow bullet.
2. When the **Progress Opportunity** page is displayed, complete the required fields and add additional information in the Tracking Note field.

   Progress Opportunity page

3. Select the **Save** button. The Opportunity Summary page is displayed. All changes made to the Opportunity from the Progress Opportunity page can be viewed 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.

Sending a Quotation

To send a quotation to the customer:

1. Open the quote from the Quotes tab.
2. Select the **Start Mail Merge** button. A list of Sales related documents is displayed in the Shared Templates list.
3. Select the quote template you want to work with. The quotation is displayed in a rich text editor, where it can be edited.
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**. 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*.

5. Select **Merge and Continue**.
6. From the Complete Merge Process page you can:
   - Deselect or select the **Create Communication** check box. Leaving the check box selected creates a completed Communication record with a link to the merged document. It 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 select the **Save** button on the Complete Merge Process page. **Note**: The ability to use the Active X plug-in is controlled by the System Administrator from Administration | E-mail and Documents | Documents and Reports Configuration.
7. Select **Continue**. If you left the Create Communication check box 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. Select the **Save** button. 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 selecting, for example, the **Proposal Submitted** workflow bullet from the Opportunity Summary page. Note that the sample workflow may vary slightly from your customized workflow.
11. Complete the required information, for example, adjusting the Certainty % field to a higher figure, and add a Tracking Note. The opportunity is now at a Stage of Proposal Submitted, and all changes made so far are reflected on the Opportunity Tracking tab.

Turning a Quote into an Order

The purchase order arrives.

To turn the quote into an order:

1. Open the quote from the Quotes tab within the opportunity.
2. Select the **Convert** button. The tab displayed switches automatically from the Quotes tab to the Orders tab and the Convert Order page is displayed.

   Note: The Convert button is still available if the expiration date on a quote has passed. However, you will receive a warning message if you try to convert an expired quote.

Convert Order page

3. Add the information in the Convert Order page. The fields are displayed in the tables 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

Field	Description
	is set via the Type check box field when a new address is created. The address can be changed by selecting an alternative address already associated with the company. A list of existing addresses associated with this company can be selected from the drop-down field below the Billing Address field. Alternatively you can type over the existing address information.
Shipping Address	Populated by the first "Shipping" type address of the company. If there is no shipping address, it defaults to the main address for the company. The address type is set via the Type check box field when a new address is created. The address can be changed by selecting an alternative address from the drop-down field below the Shipping Address field. Alternatively you can type over the existing address information.
Shipping Method	Select from a drop-down list. For example, Courier, Mail.

The Order level discount fields are:

Field	Description
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. Select the **Save** button.

   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 resequenced. Comment line items will be included on the printed order.
- **Clone**. Creates a new order based on the existing order information.
- **Start Mail Merge.** Mail merges the order with an order template document.
- **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 16-1) for more information.

Printing an Order

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

To print an order:

1. Select the **Start Mail Merge** button from the Orders tab. A list of shared templates is displayed.
2. Select the hyperlink of the order template you want to work with. The order is displayed on-screen, 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. Select **Merge and Continue**.
5. From the Complete Merge Process page you can:
   - Deselect or select the **Create Communication** check box. Leaving the check box selected creates a completed Communication record with a link to the merged document. It 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 select the **Save** button on the Complete Merge Process page. **Note**: The ability to use the Active X plug-in is controlled by the System Administrator from Administration | E-mail and Documents | Documents and Reports Configuration.
6. Select **Continue**. If you left the Create Communication check box 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. Select the **Save** button. A communication record with a link to the order is created, and the order is saved in the Documents tab.

Closing a Sale

To close an opportunity:

1. Within the context of the opportunity, select the **Sold** workflow bullet. The Progress Opportunity page is displayed.
2. Complete the **Status** details and add a Tracking Note.
3. Select the **Save** button.

   The Opportunity is set to a Stage of Sale Agreed and a Status of Won. The final step in this sample workflow is to close the opportunity by selecting the Closed workflow bullet.

Manually Progressing Opportunities

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

If your system does not 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

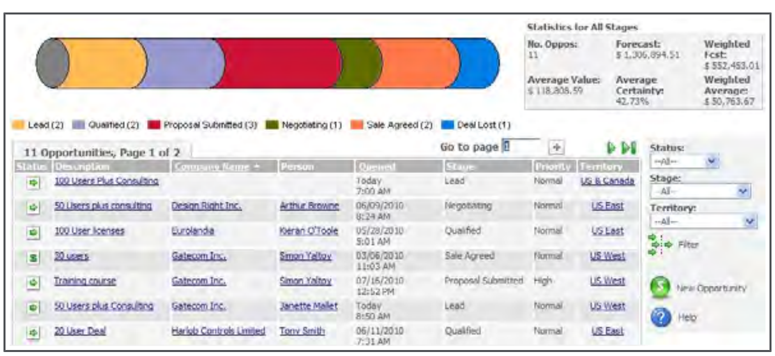
Viewing the Sales Pipeline

To view a graphical representation of your Opportunities:

- Select the **My CRM** button, and click on the **Opportunities** tab.

  The Opportunities page is displayed which is made up of the following areas:

- Graphical pipeline.
- Statistics panel.
- Opportunities list.
- Filter box.



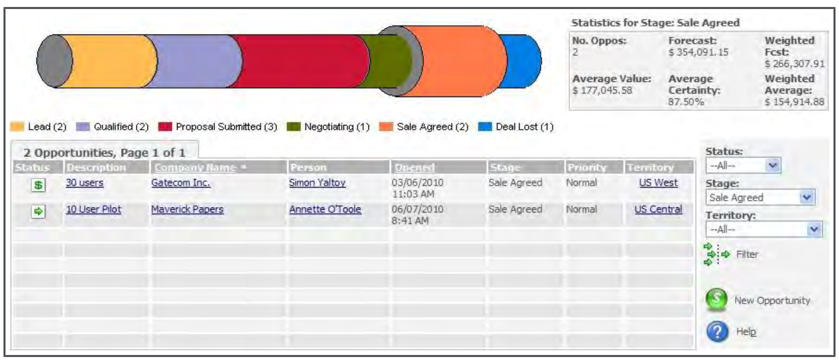
Opportunities page

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

Field	Description
No. Oppos	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.

Drilling Down on the Pipeline

Clicking on a section of the pipeline or on one of the stage hyperlinks underneath the pipeline drills down the Statistics panel to show statistics for the selected Stage in the pipeline.



Drilling down on the Opportunity pipeline

It also filters the list of Opportunities to show those in the selected Stage on the pipeline. The Stage selected on the pipeline is automatically set in the Filter Box.

You can also drill down on the pipeline by changing the Opportunity Stage from the Filter Box.

The pipeline graphic can also be viewed from the Opportunities tab of a company or person.

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, select the **Summary Report** button. The report is displayed in PDF format.

Finding Out what Opportunities I am working on

To find out which opportunities you are currently working on, that is the ones currently assigned to you:

- From within My CRM, select the **Opportunities** tab.

  The list of opportunities 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.

Creating an Opportunity from other Contexts

As well as using the New menu button to create a new opportunity, you can also create new opportunities from within My CRM. To create a new opportunity from within My CRM:

1. Select the **Opportunities** tab and click on the **New Opportunity** action button. The new opportunity gets assigned to you by default, but you can assign it to another user if you wish.
2. Fill in the opportunity details and select **Save**.

When you create quotes and orders outside the context of a company or opportunity, you may find it easier to track down the quote or order again by doing a search for the Quote or Order using the Find menu button or accessing your Recent List.

Deleting an Opportunity

The ability to delete opportunities depends on your security profile. If your profile allows you to delete opportunities, a Delete action button is available on the Opportunity summary page when you are in edit mode. Please contact your System Administrator if you need to be able to delete opportunities but the button is not available to you.

To delete an opportunity:

1. Find and open the opportunity you want to delete.
2. From the Opportunity Summary page, select the **Edit** button.
3. Click on the **Delete** button and then on the **Confirm Delete** button to delete the opportunity.

   The opportunity record is deleted from the system.

Creating Quotes and Orders Outside of the Opportunity Context

You can create Quotes and Orders outside of the Opportunity context, for example when you are in the My CRM work area or in the context of a company.

To create a Quote or Order from outside of the Opportunity context:

1. From My CRM, select the **New** menu button and select Quote or Order.
2. The New Quote or Order page is displayed.

3. Add the information on the New Quote or Order page. Please refer to Products (page 12-5) for more information.
4. You can link the Quote or Order to a company or person at this point using the advanced search buttons.
5. **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

To find a quote:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Quote** from the pop out list. The quote Find page is displayed.
3. Type or select the search criteria on the Find page.
4. Select the **Find** action button. A list of all quotes matching your search criteria is displayed.
5. Click on the hyperlink of the Quote Reference or Description. The Quote Details page is displayed, which gives you an overview of the quote.

Finding an Order

To find a order:

1. Right-click on or hover over the **Find** menu button. The Pop Out list is displayed.
2. Select **Order** from the pop out list. The order Find page is displayed.
3. Type or select the search criteria on the Find page.
4. Select the **Find** action button. A list of all orders matching your search criteria is displayed.
5. Click on the hyperlink of the Order Reference, Description or Status. The Order Details page is displayed, which gives you an overview of the order.

Chapter 13: Sales Forecasting

In this chapter you will learn how to:

- **Define what sales forecasting is**.
- **Understand sales forecasting terminology**.
- **Create my own forecast**.
- **Submit a forecast to my manager**.
- **View forecasts I already submitted**.
- **Work with team forecasts**.
- **View other people's forecasts as an administrator**.

What is Sales Forecasting

Sales Forecasting functionality:

- 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 that are currently assigned to a Sales User (in My CRM | Opportunities).
Opportunity Forecast Value	Each opportunity will have 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

Term	Description
	is to be included in.
Opportunity Forecast Scenario	Indicates which elements of a forecast this opportunity should be included in: Exclude (leave out of the forecast); Commit (this will definitely close—figure is included in Commit, Likely and Best Case); Likely (this will probably close, figure is included in Likely and Best Case); Best Case (figure is included in Best Case scenario only).

This table explains forecast-related terminology

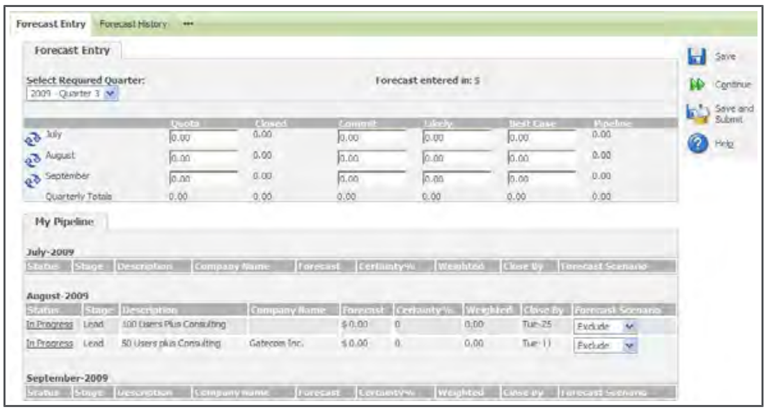
Term	Description
Quarter	A three month period.
Sales Forecast	A forecast for a given period of time (quarter) for a given Sales User, which indicates how much a Sales User feels they will close in business. Each forecast contains three values for each month in the quarter: Commit (worst case scenario); Likely; 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	To facilitate a sales team hierarchy, users can 'roll-up/report to' 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, and the forecasts of his team—Peter Johnson and Mathew Ebden.
Quota	The sales target that a Sales User has for a month, quarter, or year. Entered by their manager and may be overridden (depending on system settings) by the user themselves.

Creating a Forecast for Yourself

To work with forecasting, the System Administrator must give you rights to access the Forecasts tab. A quarterly forecast is based on opportunities already in the system, where the Opportunity Close By date falls into the quarter you are preparing your forecast for.

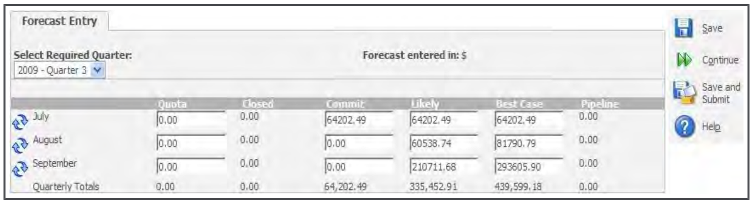
To prepare a forecast for Q4 (October to December) this year:

1. Select the **My CRM** | **Forecasts** tab to display your list of existing forecasts.
2. If there is no entry in the list yet for Q4 this year, select the **New Forecast** button. The Forecast Entry page is displayed, defaulting to the current quarter.



Forecast Entry page

3. Set the **Select Required Quarter** field 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 by default to Exclude. 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 Summary panel. The forecast currency is specified by the System Administrator for each user. If the user sets their preferred currency to a different currency within My CRM | Preferences, the forecast is still in 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 want 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 will be included in the Commit, Likely, and Best Case fields.
5. When you update the Forecast Scenarios, select the button against each month to display the effect the scenario has on your forecast in the Forecast Summary panel.



Forecast Summary panel after recalculating figures

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 will be included in the Likely and Best Case fields.
   - Best Case indicates that the business may close. The weighted forecast figure will be 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. To do this, select the Save button to save the overrides you have made. You can also add your monthly sales quota for comparison against the forecast figures.
8. Select the **Continue** button to return to the Forecast list.
9. Select the **New Forecast** button 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 on the hyperlink of the forecast in the Forecast list.

Submitting a Forecast

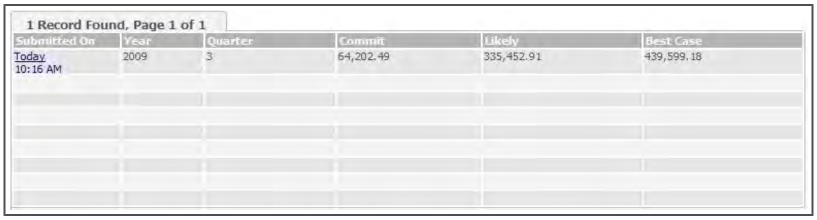
To submit your forecast to your manager:

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

Viewing Past Submitted Forecasts

To view a past submitted forecast:

1. Select the **My CRM** | **Forecasts** tab, and click on the hyperlink for the quarterly forecast that you want to review. The Forecast Entry page is displayed.
2. Click on the **Forecast History** tab. A list of all submitted forecasts for the selected quarter is displayed. There may be several if you are required to submit a forecast on, for example, a weekly basis.



Forecast History list

3. Click on the hyperlink of the Forecast History you want to review. The Forecast Entry page is displayed in read-only mode. You can click on the hyperlink of an individual opportunity to view the details of the opportunity as they stood at the time of submitting the forecast. This page is opened in a new browser window, and it can be customized by the System Administrator to show more or different information on the selected opportunity.
4. Select the **Continue** button to return to the Forecast History list.

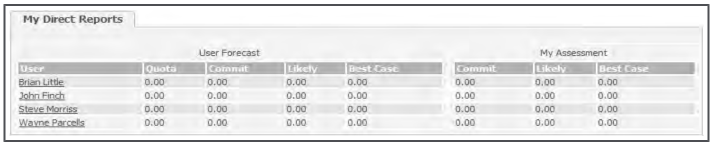
Working with your Team's Forecasts

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. Select the **My CRM** | **Forecasts** tab.
2. Click on the **New Forecast** button 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 on the **hyperlink** of 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 the hyperlink of a subordinate's opportunities, the summary screen for that Opportunity is displayed.


My Direct Reports

	User Forecast				My Assessment		
User	Quota	Commit	Likely	Best Case	Commit	Likely	Best Case
Brian Little	0.00	0.00	0.00	0.00	0.00	0.00	0.00
John Finch	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Steve Morriss	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Wayne Parcells	0.00	0.00	0.00	0.00	0.00	0.00	0.00

My Direct Reports panel

5. Select the **Save** button to update the manager’s assessment.
6. Select the **Back** button 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 on 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. Select the **Save And Submit** button to submit the full team’s forecast. This includes any opportunities the manager is personally working on.

Selecting the Save And Submit button 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 14: Leads

In this chapter you will learn how to:

- **Define what a lead is**.
- **Understand the fields on the leads screen**.
- **Create a new lead**.
- **Search for an existing lead**.
- **Match a lead to an existing company**.
- **Qualify a lead**.
- **Convert a lead to an opportunity**.
- **Manually progress a lead**.
- **View the lead pipeline**.
- **Run a leads report**.
- **Find out what leads I am working on**.
- **Create a lead from other contexts**.
- **Delete a lead**.

What is a Lead?

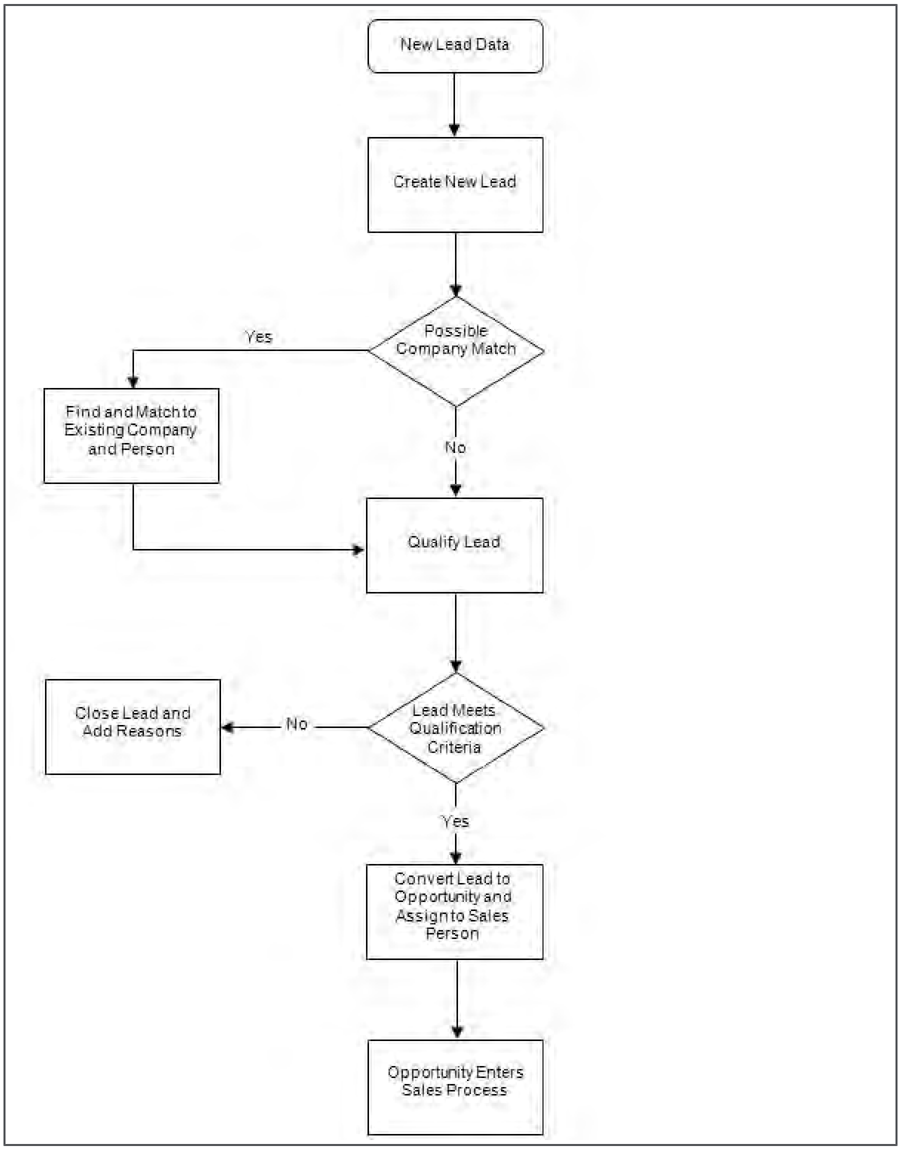
A lead represents unqualified information received from, for example, your corporate Web site, trade shows, and purchased mailing lists.

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.

Only when the lead has been qualified and is ready to be converted to an opportunity is a new company and person record created. If the company and person already exist in your system, the lead details can be matched to the existing company and person record.

This section does not describe how to import leads from, for example, purchased lists of data. This requires System Administrator rights to carry out a Data Upload. Please ask your System Administrator for more information.

Lead Qualification: Scenario

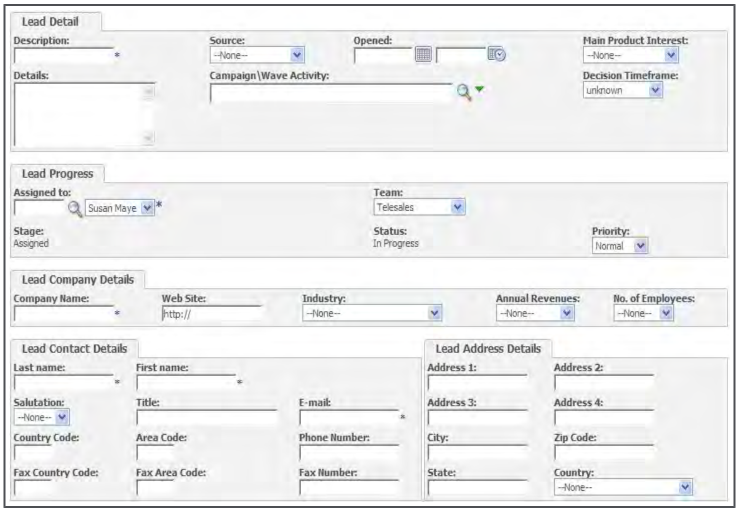


Creating a New Lead

"Hello, we work closely with First Mutual Finance. They referred us to you as the best supplier for our needs."

To capture a new lead:

1. Right-click on or hover over the **New** menu button, and select Lead from the pop out list.



New Lead page

2. Enter the details and select the **Save** button. When you do this the Lead Summary page is displayed.

You can add notes to leads from the Notes tab. You can also add and view communications linked to the lead from the Communications tab. You can recognize that a communication is linked to a lead by the Lead icon in the About column of the communication list. The Tracking tab shows all changes made to the Lead record using either the Progress button, or the Workflow buttons.

Lead Fields

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

Field	Description
Description	Short description of the lead.
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. For example, CeBIT tradeshow.
Decision Timeframe	Timeframe within which a decision will be made.
Opt out of E-marketing Communications	This flag is automatically set if the e-mail address associated with the lead has opted out of all E-marketing communications received via Sage

Field	Description
	CRM's integrated E-marketing (Swiftpage). The user can manually check or uncheck the option, however this has no impact on E-marketing e-mails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing e-mail).
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.
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 e-mail 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.

Field	Description
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

"Hello, this is Terry Gormley from NWTB. I spoke to someone yesterday about a new project we have. I had a few more questions I wanted to ask."

To search for a lead:

1. Right-click on or hover over the **Find** menu button, and select **Lead** from the pop out list.
2. Type in the name of the person, or combine any other search criteria available to you.
3. Select the **Find** action button.
4. Click on the **hyperlink** of the lead description to open the lead you want to view.

   You can see the details of the lead and view related communications and notes from within the context of the lead.

Matching a Lead to an Existing Company

If you get a "Possible Company Match" message when you save a new Lead, the company may already exist in the system.

Possible Company Match message

It is worth seeing if the unqualified lead you are working on corresponds to a valid company record in your system. If it does, you can link the raw lead details to the company by matching the two together. This provides you with a valuable source of information on the company you are dealing with, which may assist in the lead qualification process.

To match a lead to an existing company:

1. Select the **Add Or Find This Company** button. A list of possible company matches is displayed in a new browser window.
2. Click on the **hyperlink** of the company you think is likely to match. The Company Summary page is displayed in the new browser window.
3. You can browse further company information to verify a successful match by viewing information stored in the rest of the Company tabs.
4. If you think you are dealing with this company, click on the **Select Company** button.

Lead Company Details panel showing matched company

5. If the Lead Person you are dealing with also already exists, you can match them in the same way. Just click on the **Add Or Find This Person** button.

If the company exists but not the person, you can go ahead and add a new person. You can do this now or wait until later. You are not required to do this until you have fully qualified the lead and are ready to convert it 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 Person 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 potential company and person match, priority is given to company. When you select the company to match it, the person is automatically matched to an existing person in that company. You can keep the default matched person, or you can add the unmatched person (whose details are on the Lead Contact Details) to CRM and then match them to the lead instead.

If the lead turns into a potential sale (opportunity), you are required to incorporate the Lead Company and Person into the main Company and People records. For more information, please refer to Converting a Lead to an Opportunity (page 14-7).

Qualifying a Lead

The information you receive from Terry Gormley at NWTB allows you to fully qualify the lead.

If Lead Workflow is enabled in your system, you will see a number of workflow buttons on the right-hand side of the Lead Summary page. The workflow buttons available to you will vary depending on how the lead workflow has been set up and customized to suit your lead qualification process.

Lead workflow buttons

You can qualify and rate the probability of a lead becoming a successful sale based on communications with the prospect and other sources.

To qualify the lead:

1. Select the **Rate Lead** workflow bullet. The Progress Lead page is displayed.

Progress Lead page

2. Complete the required fields and add additional information in the Tracking Note.
3. Select the **Save** button. The Lead Summary page is displayed. All changes made to the Lead from the Progress Lead page can be viewed from the **Lead Tracking** tab.

The Duration column on the Lead Tracking tab shows how long the lead has spent at each stage in 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 into an opportunity.

The prerequisite for converting a lead to an opportunity is that the lead is "matched" to an existing company or 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).

If you have not yet associated the lead with a company and person, you need to do so now. The company and person may already exist in the database, in which case all you need to do is match the lead to the existing records. If the data is not yet in the system, you will need to add a new company and person—or add a new person if the company already exists, but the person is new.

To convert a lead to an opportunity:

1. Find and open the lead you want to convert to an opportunity.
2. From the Lead Summary page, select the **Convert To Opportunity** button.
3. If you have not yet matched the lead to a company or person, a warning dialog box is displayed.

Warning dialog box

4. To match the lead to a company, select the **Add Or Find This Company** button on the Lead Summary page.
    - 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 on the Add Or Find This Person button.
    - 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. Select the **Save** button.
6. Click the **Select Company** button. The Lead Summary page is displayed, showing that the lead has been matched to the new company and person that you have added to the system.
7. Select the **Convert To Opportunity** button. For more information on the Opportunity fields, please refer to Creating a New Opportunity (page 12-4).
8. Complete any further known details on the Record New Opportunity page.
9. Select the **Save** button. The Opportunity Summary page for the new opportunity is displayed.

An opportunity that has been created via conversion from a lead has the following features:

- A **View Lead** button on the Summary page. This allows you to toggle 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.
- The **Opportunity Tracking** tab 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. Whether your system uses workflow or not is a an option which can be configured by your System Administrator in Administration | Advanced Customization | Workflow & Escalation Configuration.

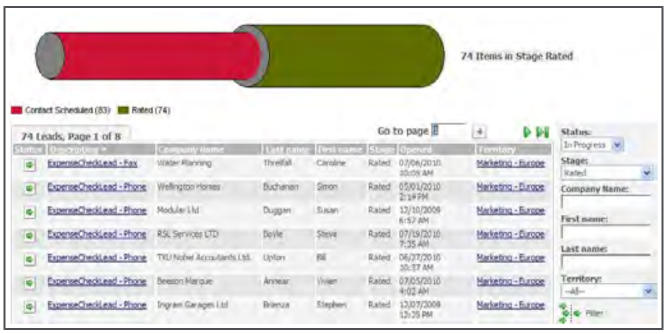
If your system does not use Lead Workflow, you will notice that the Lead workflow bullets on the right-hand-side of the Summary page are replaced by a Progress button. This button allows you to manually change details of the lead via the Progress Lead page. Changes are still recorded on the Tracking tab.

Viewing the Lead Pipeline

To view a graphical representation of Leads that you are currently working on:

- Select the **My CRM** button.
- Click on the **Leads** tab. A list of leads assigned to you, with a status of In Progress, is displayed. A graphical pipeline of your leads is displayed above the list.

You can drill down on the pipeline by clicking the pipeline segment representing the lead stage that you want to zoom in on. For example, if you want to see leads at a stage of Rated, click on that section of the pipeline.



Drilling down on the Leads pipeline

The list of leads is filtered to show only leads at a Stage of Rated. You can toggle back to the full list of leads by clicking on the highlighted segment of the Lead pipeline.

The pipeline graphic can be disabled from the Preferences tab. Please refer to Changing Preferences (page 22-6) for more information.

Viewing Leads Assigned to You

To find out which leads you are currently working on:

- From within My CRM, select the **Leads** tab.

The list of leads 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.

Creating a Lead from My CRM

As well as using the New menu button to create a new lead, you can also create new leads from within My CRM. To create a new lead from within My CRM:

1. Select the **Leads** tab and click on the **New Lead** action button. The new lead gets assigned to you by default, but you can assign it to another user if you wish.
2. Fill in the lead details and select **Save**.

Deleting a Lead

The ability to delete leads depends on your security profile. If your profile allows you to delete leads, a Delete action button is available on the Lead Summary page when you are in edit mode. Contact your System Administrator if you need to be able to delete leads but the button is not available to you.

To delete a lead:

1. Find and open the lead you want to delete.
2. From the Lead Summary page, select the **Edit** button.
3. Click on the **Delete** button and then on the **Confirm Delete** button to delete the lead.

The lead record is deleted from the system.

Chapter 15: Outbound Call Handling

In this chapter you will learn how to:

- **Define Outbound Call Handling**.
- **Use the Outbound Call Handling Buttons**.
- **Access related information to the person I'm calling**.
- **Access outbound calls**.
- **Working with outbound calls**.

Introduction

Outbound Call Handling module automates the process of performing 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 does not get cluttered with hundreds of campaign-based telephone calls.
- Your quota of campaign calls will not get overlooked if you are 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

Button	Description
	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 after the date/time set.

Outbound Call Handling Tabs

These tabs are accessible from the Introduction page.

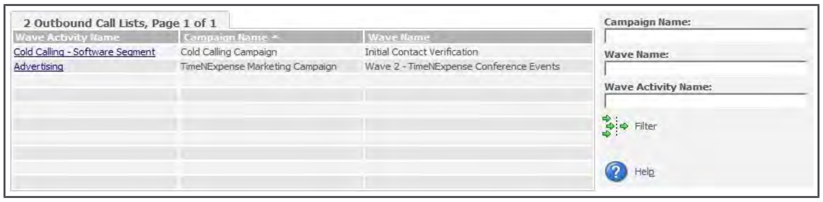
Field	Description
Company Summary	Displays the company tabs in a new browser window.
Person Summary	Displays the person tabs in a new browser window.
New Person	Allows the user to add a new person from a new browser window.
Quick Look	Displays the Quick Look tab in a new browser window.
New Lead	Allows the user 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 the user to add a new opportunity from a new browser window.
New Communication	Allows the user 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 from the My CRM area.

To access the call lists:

1. Go to the **Preferences** tab in My CRM and make sure that the **Show Outbound Calls In My CRM** option is set to Yes.
2. From within My CRM, click on the **Outbound Call Lists** tab. All outbound call lists that you have been assigned to work on are displayed.



Outbound Calls tab

3. Click on the **hyperlink** of the call list you want to work on. The Summary page is displayed. The information displayed is divided into: Individual Statistics; Wave Activity Summary.

Summary page

A user with Info Manager Administration rights also sees an additional panel called 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

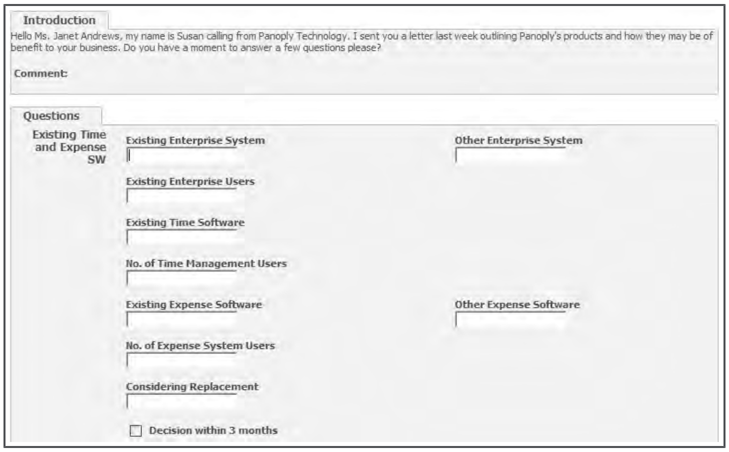
You use the buttons on the right-hand side of the page when working with call lists.

To contact the first person on the call list:

1. Select the **Get A Call** button. The Introduction page is displayed, showing the Call Data panel, Introduction panel, and Person Summary. 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 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 17-14) for more information. This is a "pre-pitch" prompt to help the user establish that they are talking to the right person. You can also add a comment from this page by selecting the Add A Comment button. The comment is stored in the call list record for this person.

Introduction page

2. Select the **Got Through** button. 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 have established you are speaking to the correct person.

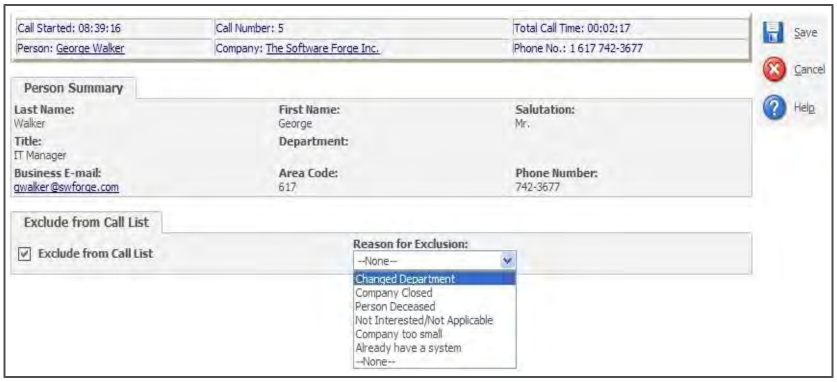


Contact Introduction page

3. Add the data gathered during the conversation. This gets stored in the system—usually with the Communication or Person—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 are ready for the next call, select the **Get Another Call** button. 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.

Introduction page

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 on the **hyperlink** of their name. If you are not able to speak to them on the same call or decide to call them later, they will remain assigned to you.
6. To exclude a contact from the list—*"I'm sorry, Arthur doesn't work in that department any more"*—click on the **Exclude** button. The Exclude From Call List page is displayed.



Exclude from Call List page

7. Select a **Reason For Exclusion** and click on the **Save** button. These are defined by the Marketing Manager or your System Administrator.
8. You can toggle the person back onto the call list using the **Include** button.
9. You can block a contact from the call list until after a specific date/time by selecting the **Call Back After** button. 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 on the **Save** button.

Call Back After page

11. To finish a session of calls using the current call list, select the **Finish Calling** button. The Outbound Calls Summary page is displayed, showing updated statistics for the current call list.

Chapter 16: Groups

In this chapter you will learn how to:

- **Understand the scope of Group functionality**.
- **How groups are compiled**.
- **Access the Groups tab**.
- **Create a group**.
- **Create a group from the Groups tab**.
- **Create a group from the Wave Activities tab**.
- **Create a group based on a primary entity search**.
- **Add a primary entity record to a group**.
- **Add multiple records to a group**.
- **Add multiple records to a group using Find/Saved Search**.
- **Add multiple records to a group using advanced find**.
- **Add the records of one group to another group**.
- **Editing a Group**.
- **Perform a mass update on a group**.
- **Update group territories**.
- **Refresh a group**.
- **Understand how information generated through groups is stored**.
- **Process information generated using groups**.
- **Add a tab to hold information generated by groups**.
- **Export group information**.
- **View an exported group**.
- **Configure the system to send mass e-mails**.
- **Send a mass e-mail**.

Introduction to Groups

Groups functionality allows you to create, modify, and save lists of people, companies, leads, cases, opportunities, quotes, and orders based on defined filter criteria. The filter criteria can be simple, for example, "All IT Managers in Dublin", or complex, for example, "All Marketing Managers in the Telecoms sector in London, Dublin, or Manchester, who attended our seminar last year, but who have not yet replied to our invitation mail shot".

Groups also make use of the following features:

- Groups can be generated based on views of equivalent flexibility and power as CRM reports can. Please refer to "View Customization" in the *System Administrator Guide* for more information.

- Groups can be generated based on the Key Attributes functionality. Please refer to "Key Attribute Profiling" in the *System Administrator Help* for more information.
- You can define how a group's contents are sorted when it is displayed.
- Overall navigation in and around groups makes use of forward and back buttons between pages and Go To page.

Note: A company that does not have any people associated with it can appear in a group. However, such a group cannot appear in an Outbound Call List.

Technical Overview

Group Building. Groups are based on SQL views generated by queries that retrieve records selected according to specified entity IDs. The user can select the view to base the group on. These views can be added to and/or changed by the System Administrator in Administration | Customization | Views. The user can use any of the fields available from the view to filter the group result. The user can use Key Attribute Data for filtering purposes as well.

Group Storage. Groups can be static or dynamic. When a static group is saved, both the query that generated the group and the list of records it returned are saved. Whenever a user goes back into a static group, it returns the list of records that were saved. In other words, if more records matching the same criteria were added to CRM after the group was saved, they will not appear in the group.

When a dynamic group is saved, only the query that generates the group is stored in CRM. Each time a dynamic group is opened, the query is run and the group contents are refreshed to return the CRM records that match the query criteria at that time.

Groups Tab

Groups can be viewed and managed from the **My CRM | Groups** tab. The Groups tab will only appear in My CRM if your System Administrator has given you rights to access to the Groups tab via **Administration | Users**.

Creating a Group

Groups can be created in the following ways:

- From the Groups tab.
- From the Wave Activity tab.
- Based on a primary entity search.
- When performing a Data Upload. Please refer to "Running the Data Upload" in the *System Administrator Help* for more information.
- From any search list results.

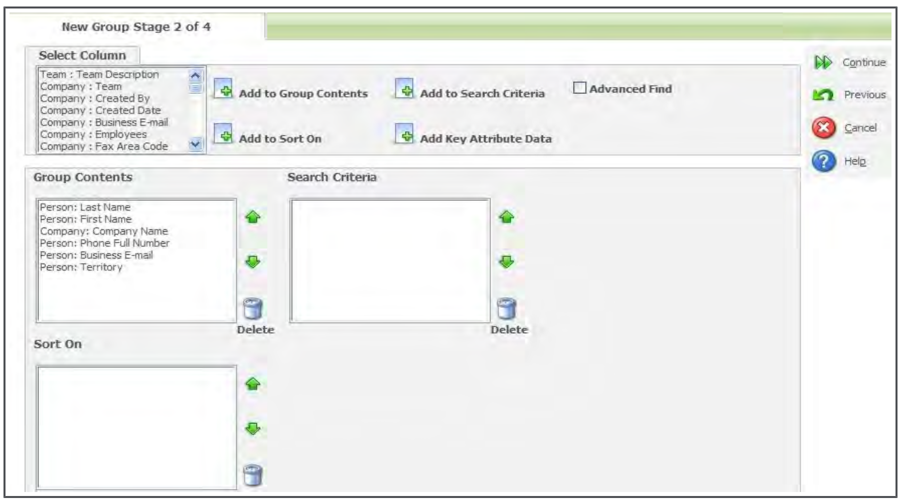
Creating a Group from the Groups Tab

To create a new group from the Groups tab:

1. Select the **My CRM** button.
2. Click on the **Groups** tab.
3. Click on the **New Group** button. The New Group Stage 1 of 4 page is displayed.

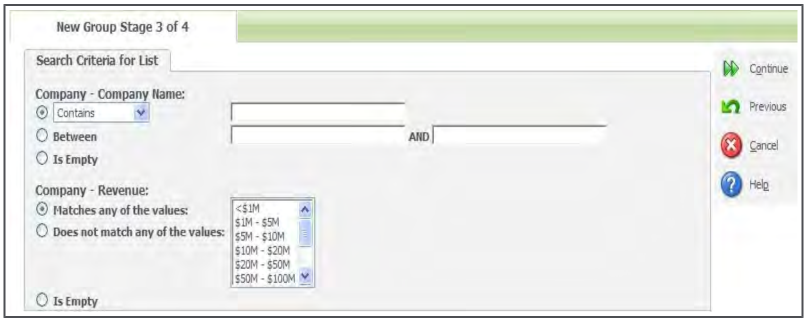
New Group Stage 1 of 4 page

4. Type a name and description for the group in the **Name** and **Description** fields.
5. Select which type of group you wish to create from the **Type** drop-down list. You can create a static or dynamic group.
6. Select the main entity that the group is to be based on from the **Entity** drop-down list. All records within a group must be based on the same primary entity. When you select an entity the screen is refreshed to display the Source View drop-down list. Only views that return one row per ID field will be displayed.
7. Select the **Source View** for the group and click on the Continue button. The New Group, Stage 2 of 4 page is displayed.



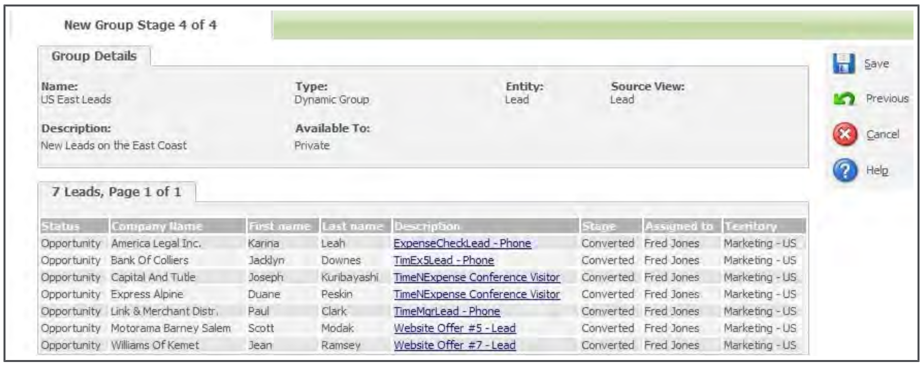
New Group Stage 2 of 4 page

8. Select the columns that you wish to include in the group contents, search criteria, and sort order.
9. Select the **Advanced Find** check box if you wish to create an advanced find query to generate the group. Please refer to Using Advanced Find (page 3-7) for more information.
10. You can also add Key Attribute Data to the selection fields of your group definition.
11. Select the **Continue** button when you are ready to proceed. If you have added search criteria, the New Group, Stage 3 of 4 page is displayed.



New Group Stage 3 of 4 page

12. Specify the Search Criteria you require.
13. Click on the **Continue** button. The New Group, Stage 4 of 4 page is displayed.



New Group Stage 4 of 4 page

14. If you are creating a static group, you can toggle the **Include All** and **Exclude All** buttons on or off. The default is to **Include All**.
15. Once you are satisfied with the group, select the **Save** button.

Note: If you are creating a static group, you have the option to click on the **Save Empty Static Group** button. This action saves the query that generated the group, but it will not save the list of records returned by the group. This can be used, for example, to build a group of individually selected records. Please refer to Adding a Primary Entity Record to a Group (page 16-7) for more information.

Group Action Buttons

This table describes the Group action buttons.

Button	Description
Start Mail Merge	This merges a standard template with the address and contact details of the recipients in the group.
New Task	Creates a task against each recipient on the group.
New E-mail	Sends an e-mail to each recipient on the group.
Export To File	Exports the group as a text or a CSV file. Exported

Button	Description
	groups can be viewed from My CRM | Shared Documents.
New E-marketing E-mail	Lets you set up an E-marketing E-mail Wave Activity to send an E-marketing E-mail to each recipient on the group. You must choose a Campaign and Wave for E-marketing E-mail Wave Activity first. You must also have E-Marketing enabled. Please refer to Setting up an E-marketing Campaign (page 17-20) and Creating an E-marketing E-mail (page 17-21) for more information.
Mass Update	Displayed to System Administrators only, and the Administration | System Behavior setting Allow Mass Update And Update Territory must be set to Yes. Please refer to Performing a Mass Update on a Group (page 16-10) for more information. Allows simultaneous updates to all records in the group.
Update Territory	Displayed to System Administrators only, and the Administration | System Behavior setting Allow Mass Update And Update Territory must be set to Yes. Please refer to Updating Group Territories (page 16-11) for more information. Allows an administrator to update territories for a group.
Include All	Available for static groups only. Toggles all members of the group to be included.
Exclude All	Available for static groups only. Toggles all members of the group to be excluded.
Refresh	Refreshes the group to include all people, companies, or leads who have been added since the creation of the group and who meet the search criteria.
Exclude Previous Recipients	Available for static groups only. If the group has already been used for an action, this button excludes the people, companies, or leads who were the targets of that action.
SQL	Displayed to System Administrators only. Displays a new window containing the current SQL used to generate the group. If you have SQL experience, this statement can be customized.

When you select one of these actions, for example, New E-mail, you will notice a new panel called Parent Category Selection. To begin with, this will just contain one entry, for example e-mails, which corresponds to the type of action you selected to perform on the group.

Parent Category Selection panel

When you select the Parent Category, and execute the action you are performing, a new category is automatically created in Key Attribute Data underneath—or as a "child" category of—eMails. This "child" record stores a link to every recipient for this particular action. This means that this piece of key attribute data can itself be used as a selection criteria for a follow-up action to this e-mail. Please see Key Attribute Data Generated by Groups (page 16-13).for more information.

Creating a Group from the Wave Activities Tab

To create groups from the Wave Activity tab in the Marketing area, you must have System Administrator or Information Manager rights. Groups created from here can be used to allow you to filter and manage responses to individual wave activities. For example, you could create a dynamic group that will filter and record all good responses to a wave activity. For more information on creating groups from the Wave Activity tab, please refer to Creating a New Group based on Responses (page 17-12).

Creating a Group Based on a Primary Entity Search

If you have groups access, you can create a group containing the results of a search on any of the primary entities - Company, Person, Case, Opportunity, Lead, Quote, or Order. For example, you might want to create a group based on the results of a search for all companies based in Chicago.

A group can also be created based on the results of an Advanced Find search. Please refer to Using Advanced Find (page 3-7) for more information.

To create a group based on a primary entity search:

1. Select **Find** | **Company**. The Company Find screen is displayed.
2. Type **Chicago** in the City field.
3. Click on the **Find** button. A list of companies based in Chicago is returned.
4. Click on the **Create New Group** button. The Create New Group dialog box is displayed.

Create New Group

5. Enter a name and description for the new group in the **Name** and **Description** fields.
6. Select who you would like to make the group available to from the Available To drop-down list. As an Info Manager with Groups access, you can make groups available to other Information Administrators, or you can choose to keep the group for your own private use. As a System Administrator, you could also choose to make a group available to all users.
7. In the Type field, you can choose to make the group dynamic or static.
8. Select the **Save** button to save the new group.

Adding a Primary Entity Record to a Group

You can add a primary entity record (person, company, case, opportunity, or lead) to an existing group based on that entity directly from the entity summary screen. In this example, we will add a company record to a group.

Note: Primary entity records can only be added to static groups in this way.

To add a primary entity record to a group:

1. Select **Find** | **Company** and locate the company you wish to add to a group.
2. Open the company summary page.
3. Click on the **Add This Record To A Group** button. The Add To Group dialog box is displayed.
4. Select the group to which you wish to add the record 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 on the **Save** button.

Adding Multiple Records to a Group

Users with group access rights can add multiple records of the same entity type to any static group. You can add records by searching on a standard entity search screen, or you can search for records using an advanced search. You can also 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, a notice will be displayed to alert you if you attempt to add a record that is already in the destination group.

Note: CRM will not add records for which users do not have security rights. Instead, users will be informed that the records are not available to the user.

Adding Multiple Records to a Group using Find/Saved Search

To add multiple records to a group using Find/Saved Search:

1. Select **My CRM** | **Groups**.
2. Click on the link for the group you wish to add records to. The Group Details screen is displayed.
3. Click on the **Add Records To The Group** button. The Add To Group dialog box is displayed.

Add To Group dialog box

4. Add Records Via Find / Saved Search is selected by default. Click on **Continue**. The Entity Search Screen is displayed.
5. Search for the records you wish to add to the group using the filter options or by running a saved search.
6. Click on the **Add To Group** button. A notification will be displayed to tell you how many records have been added to the group.
7. Click on the **Continue** button to go to the Group Details page.

Adding Multiple Records to a Group using Advanced Find

To add multiple records to a group using Advanced Find:

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

Adding the Records of One Group to Another Group

To add the records of one group to another group:

1. Select **My CRM** | **Groups**.
2. Click on the link for the group you wish to add records to. The Group Details screen is displayed.
3. Click on the **Add Records To The Group** button. The Add To Group dialog box is displayed.
4. Select the **Add Another Groups Records** radio button.
5. Click on **Continue**.
6. Select the group whose records you wish to add from the **Groups** drop-down list.
7. Click on the **Save** button. A notification will be displayed to tell you how many records have been added to the group. **Note:** Duplicate records will not be added.
8. Click on the **Close** button to close the Groups dialog box.

Refreshing a Group

Let's say you set up a group of people based on the search criteria of City = Dublin. You carry out a mail shot to that audience announcing an upcoming trade show. Meanwhile, your data entry people have been busy collecting new contact details of people in the Dublin area. These have been added to the system during the week after you sent the mail shot out.

Dynamic groups will refresh automatically, with new records that match the group search criteria being automatically added to the group. With a static group, you must use the Refresh button to add new matching records to a group. With a static group, when performing a mail merge, you can use the Refresh button to send a similar mail shot to all the people who have since been added to the system.

To refresh a static group:

1. Create a new group of people based on a criteria, such as City = Dublin.
2. Open the group and perform a mail merge using the **Start Mail Merge** button.
3. Add three new people to the system, making sure they meet the search criteria you used for the group generation.
4. Open the group, and make a note of the number of people on it, for example 23.
5. Click on the **Refresh** button.
6. The number of people should be as before plus three, for example 26.
7. If the mail shot you are sending out is exactly the same as the one you have already sent, you do not need to resend it to all the previous recipients.
8. Select the **Exclude Previous Recipients** button.
9. The list should still show 26 people, with 23 excluded.
10. Now you can carry out the mail merge using the **Start Mail Merge** button, and it only goes to the three new contacts.

Editing a Group

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

To edit a group:

1. Select the **Groups** tab.
2. Open the group that you want to edit. The Group Details page is displayed.

3. Click on the **Change** button. The Group Stage 1 of 4 is displayed. You can edit several group attributes on this page.
4. Select **Continue** to move through the editable group attributes.
5. When you have reached the Group Stage 4 of 4 page, click on the **Save** button to save your changes.

Note: Group records are locked when selected, so only one user can make changes to a group at any one time.

Performing a Mass Update on a Group

The ability to perform a mass update on a group is available only to System Administrators and Info Managers with Info Manager User Rights. This option must also first be enabled on the System Behavior page. Please refer to "System Settings" in the *System Administrator Guide* for more information.

The mass update option allows you to simultaneously update the same fields in selected records within a group. For example, say four people in a group of contacts have moved from the Europe region to the US East region. Using the mass update function, you can simultaneously update the region field for all four records.

Note: The System Administrator should ensure they have a full backup of the database before carrying out a mass update.

To perform a mass update on a group:

1. Select the **Groups** tab.
2. Open the group that you want to update. The Group Details page is displayed.
3. Select the appropriate **Exclude** check boxes to exclude any records that you do not wish to update.
4. Select the **Mass Update** button. The Fields page is displayed. This page displays all the fields common to the records selected on the Group Details page.
5. Select the fields you wish to update. For this example, select the Region field.

Fields page

6. Click on the **Continue** button. The Region drop-down list is displayed.
7. Select the region you wish to update the records to, for example, **US East**.
8. Click on the **Save** button. A warning is displayed to tell you how many records will be affected by the update.

9. Click **OK**. The Summary Of Updated Records page is displayed.
10. Select the **Continue** button. The selected records have now been updated.

User Requirement: System Administrator Rights or Info Manager User Rights

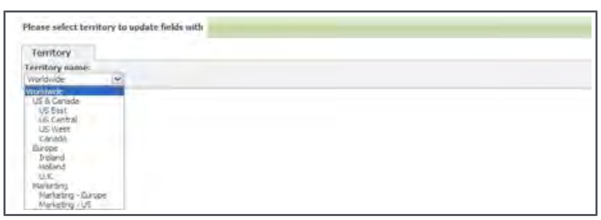
Updating Group Territories

The ability to perform an update on group territories is available only to System Administrators, and this option must first be enabled on the System Behavior page. Please refer to "System Settings" in the *System Administrator Guide* for more information. The update territories option allows you to update simultaneously the territory field in selected records within a group. For example, say you have a group of contacts that have been assigned to various territories in the US and you would like to update the entire group to the US Canada territory.

Note: The System Administrator should ensure they have a full backup of the database before carrying out a mass update. It is also recommended that all users are logged out of the system before carrying out a territory update. Please refer to the *System Administrator Guide* for more details.

To update group territories:

1. Select the **Groups** tab.
2. Open the group that you want to update. The Group Details page is displayed.
3. Exclude any records that you do not wish to update.
4. Select the **Update Territory** button. The Territory page is displayed.
5. Select the new group territory from the **Territory Name** drop-down list. For this example, select US Canada.



Territory page

6. Click on the **Save** button. The Summary Of Potential Update Records page is displayed.
7. Click on the **Go** button. The Summary of Updated Records page is displayed.
8. Select the **Continue** button. The selected records have now been updated.

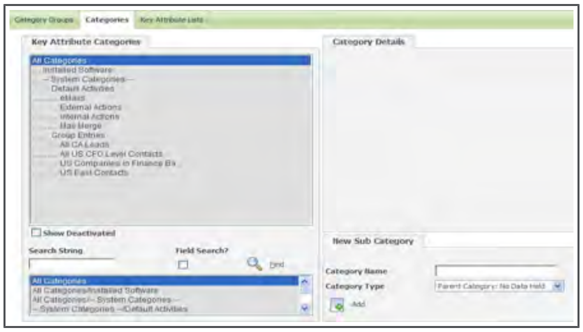
User Requirement: System Administrator Rights

How Group Information is Stored

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" (that is, Companies, People, Leads, Opportunities, Cases, Quotes, or Orders) are saved with a piece of key attribute data, which identifies the group and all its members. The saved group can be viewed from

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.



Key Attribute Categories list with Group Entries

- When you perform an action against records in either a static or dynamic group, the action—and all the records in the group it was carried out on—are saved with a piece of key attribute data. The actions can be viewed from **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.

User Requirement: Info Manager Administration Rights

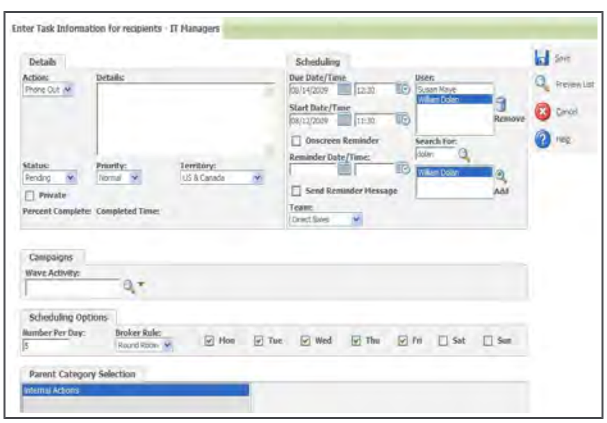
Key Attribute Data Generated by Groups

The following example illustrates how to work with key attribute data generated by static groups. You must have System Administrator rights, or Info Manager with Key Attributes rights to follow these steps.

1. Create a new static group of people where the Title Code = IT Manager.
2. Select the **Continue** button, and select the columns you want to display in the group.
3. Select the **Continue** button and set the search criteria to IT Manager. The New Group Stage 3 of 4 page is displayed.
4. Select the **Continue** button. The New Group Stage 4 of 4 page is displayed.
5. Select the **Save** button. The page is displayed with a Group Saved bar at the top.
6. Select **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.

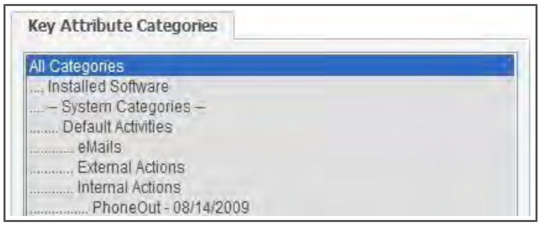
Group Entries categories

7. Now return to **Main Menu** | **My CRM** and select the Groups tab.
8. Click on the hyperlink of the group you created.
9. Select the **New Task** button to schedule a phone call to each person in the group. The New Task page is displayed.
10. Complete the communication details, and select **Internal Actions** on the Parent Category panel at the end of the page. The default Parent Category is set up from Administration | Key Attributes | Category Groups | Activity Category Groups.



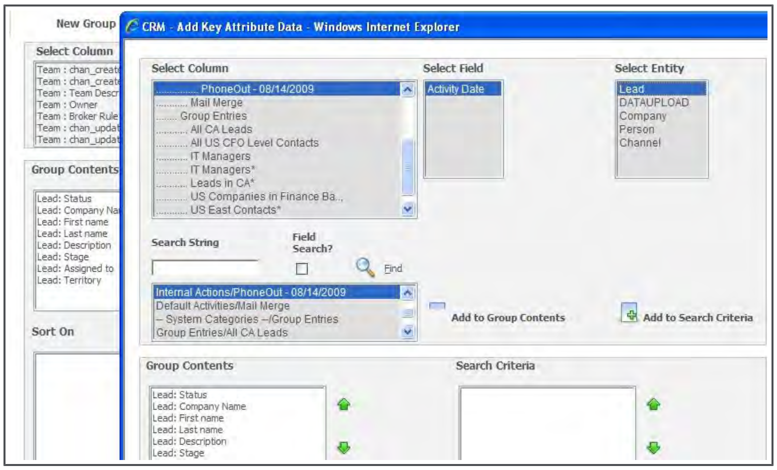
New Task page

11. Select the **Save** button. A communication is scheduled for each person in the group, and you are returned to the Build List, Step 3 of 3 page.
12. Select **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.

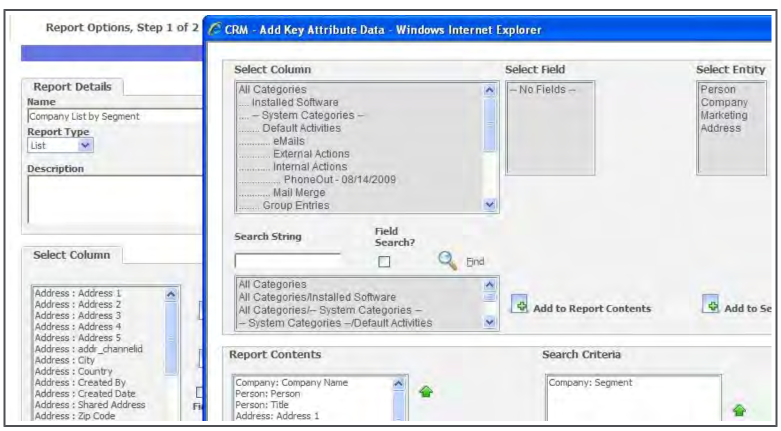


Default Activities | Internal Actions category

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.



Building a new group based on a previous action stored in Key Attribute Data



Building a report based on a saved Group Entry

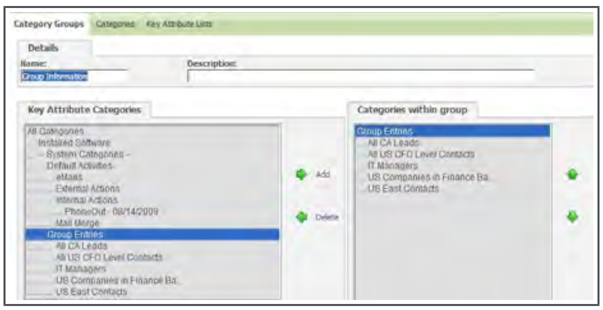
User Requirement: Info Manager Administration Rights

Adding Group List Information to a Tab

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, e-mail 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. The Key Attribute Profiling chapter in the *System Administrator Guide* gives more information on exactly how to do this, but the summary steps are listed below.

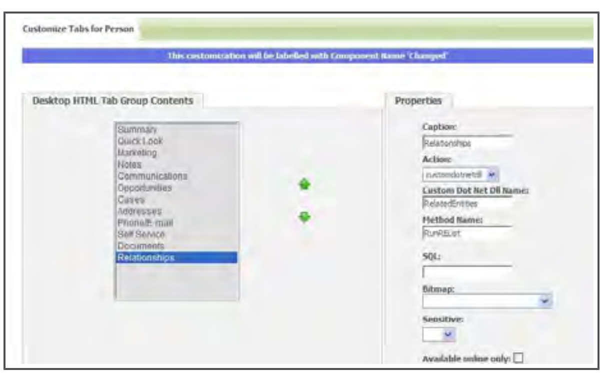
You must have System Administrator rights, or Info Manager with Key Attributes rights to follow these steps.

1. Select **Administration | Advanced Customization | Key Attributes** | **Category Groups**, and make sure that **General Category Groups** is selected in the list.
2. Click on the **New** button.
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.



Category Groups page

5. Select the **Save** button to display the new category group.
6. To display the information on a tab within the context of a person, select **Administration** | **Customization** | **Person** | **Tabs**.
7. Click on the hyperlink of 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.



Customize Tabs page

9. Select the **Add** button, then click on the **Save** button.
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 on the **hyperlink** of the person.
12. Select 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.

Group information displayed on a Tab as Key Attribute Profiling data

User Requirement: Info Manager Administration Rights

Exporting Group Information

You can export a group to a CSV or text file. If a group is exported to a CSV file, it will be saved in the My CRM | Shared Documents tab. When exporting a group to a file, the type of communication record created will depend on the type of entity the group is based on. When a group is based on the Person or Company entities the communication that is created is linked to each contact in the group and a record of the group export will appear on the Communications tab of every person or company in the group. However, 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. Select **My CRM** | **Groups**.
2. Click on the hyperlink for the group you wish to export. The Group Details page is displayed.
3. Click on the **Export To File** button. The Export Group page is displayed.
4. Select either the **Spreadsheet (CSV)** or **Text** option and then click on the **Save** button.

Note: The **Create entry in shared documents** check box is selected by default if the group you are exporting is not private. If the group is private, the check box is deselected by default. Selecting it will make the shared document available to all users.

Once the list has been exported, you can view it or save it to a location of your choice.

Viewing an Exported Group

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

To view an exported group:

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

Sending Mass E-mails

Mass e-mails can be in text or HTML format, and they can contain file attachments and inline images. You must have the Send E-mail As HTML field set to Yes (in Administration | Email And Documents | Email Configuration) to upload an inline image.

Note that if you are using a free 30-day trial, your mass e-mails 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 e-mails will never go out to the associated Company, Person or Lead e-mail address where this flag is set - even if the user has manually unchecked the option in CRM.

If you are using CRM's own mass e-mail feature, it is recommended that the opt-out flag is added to the group search criteria to ensure that people who have opted out of receiving e-mails via E-marketing, do not receive other marketing e-mails generated using the standard Mass E-mail feature.

Using the opt-out flag in group search criteria

Configuring CRM for Mass E-mails

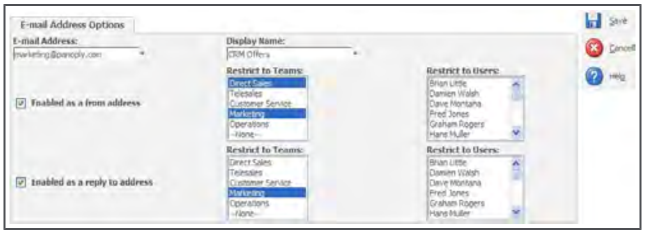
Once the Embedded E-mail Editor is configured, you can use the Mass E-mail functionality. However, if you want the ability to send e-mails in HTML format, you will need to make sure the system is configured to do so. You will also need to ensure that the required From and Reply To addresses have been specified.

To ensure that HTML e-mails can be sent to groups:

1. Select **Administration** | **E-mail And Documents** | **E-mail Configuration**. The E-mail/SMS settings page is displayed.
2. Check that the **Send E-mail As HTML** field is set to **Yes**. If you don't have a requirement to send HTML e-mails, the Internal SMTP option can be chosen.

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

1. Open **Administration** | **E-mail And Documents | E-mail Aliases** and select the **New** button. A list of e-mail addresses that e-mails can be sent from is displayed. If the entry for the e-mail address you want to send mass e-mails from is not listed, you will need to set up an entry for it.
2. Click on the **hypelink** of the mailbox you want to use to send mass e-mails from, and select the **Change** button. In this example, the Marketing mailbox is being used.
3. Ensure that the E-mail Address and Display Name fields are completed and that From and Reply To addresses are enabled and specified.



E-mail Address Options panel

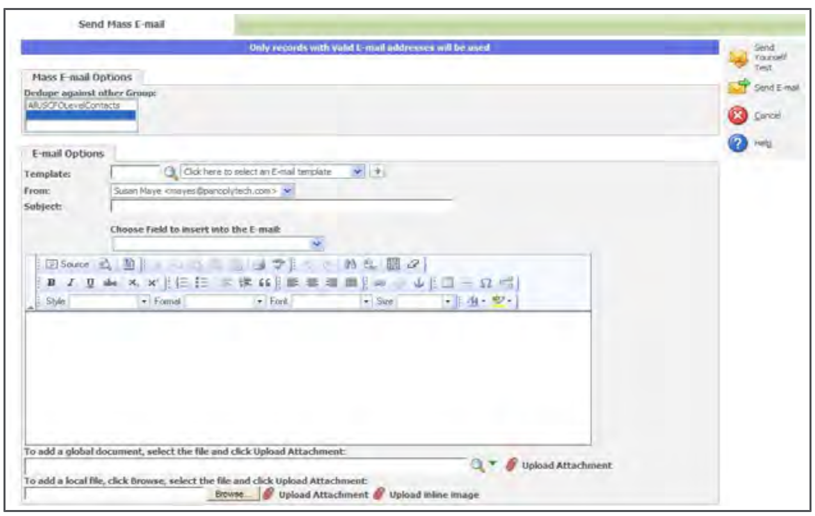
4. Select the **Save** button.

User Requirement: Info Manager Administration Rights

Sending E-mails to Groups

To send an e-mail to a group:

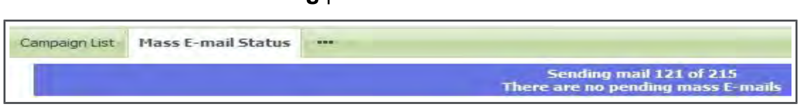
1. Select **My CRM** | **Groups**, and select the hyperlink of the group you want to send the mass e-mail to. The Group Details page is displayed.
   - **Note:** Mass e-mails cannot be performed on Groups that are not linked to a Person, Company or Lead.
2. Select the **New E-mail** button. The Send Mass E-mail page is displayed.



Send Mass E-mail page

3. Select a Group from the **Dedupe Against Existing Group** field if you want to make sure this e-mail does not get sent to members of another Group.
4. If you want the mass e-mail to be based on an existing template, click the **Template** field. CRM templates usually contain standard content and field codes. Further formatting layouts are available from the **Layouts** toolbar button.
5. Select the **From** address you want to use in the **From** field. Options available will depend on available mailboxes and your security rights.
6. Type the subject of the e-mail in the **Subject** field.

7. You can include information in different formats in the body section.
    - You can type a message in standard text, and use the formatting buttons to format the text. You can also use bullets and numbering and insert tables in your e-mails.
    - Select merge fields from the **Choose Field To Insert Into The E-mail** drop-down if you want to include, for example, the recipient's first name or title in the e-mail.
    - You can copy HTML content and paste it into the body field.
    - Select the **Source** button, and you can then copy HTML content and paste it into the body field. HTML source code typically references image files, such as JPGs, GIFs and BMPs. Ensure that such images are referenced correctly so that the person receiving the e-mail 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 do not have experience in writing HTML source code, you should ask the person creating the HTML source to ensure that the images are referenced in this way in the HTML file before you use it in your mass e-mails.
    - You can add a .GIF, .JPEG, or .JPG file as an inline image. An inline image is an individual image that is included in the e-mail body. Inline images are displayed in the e-mail body, and they are referenced from the e-mail server in the HTML source. To upload an inline image, navigate to the image file using the Browse button, select the image file, and click the Upload Inline Image button. The image then needs to be referenced within the HTML in order to be displayed in the body of the e-mail. You can edit the HTML source by selecting the Edit Source button and amending the script.
    - You can attach global documents and local files. To attach a global document, use the Search Select icons to locate the file, select the file and then select the **Upload Attachment** button. Please refer to Advanced Search Select (page 2-9) for details on using the Search Select buttons. To attach a local file, select the **Browse** button, navigate to the file, and select the **Upload Attachment** button.
8. Once you have added content in the e-mail body, you may want to specify additional rules for saving the communication in the database. The option to specify additional rules is not available if you are using E-mail Management to handle outbound e-mails. From the Communication Options panel, select the team and territory in which you want the communication to be saved from the Team and Territory fields, respectively. In addition, specify the status and the type of communication you want the e-mail saved as from the Status and Action fields.
9. If you want to link the mass e-mail to a Wave Activity, select it using the Wave Activity field.
10. If you select **E-mails** from the Parent Category selection field, a new category is automatically created in Key Attribute Profiling as a "child" category of eMails, when the e-mail is sent. The name of the category corresponds to the text you typed in the subject field, for example, CRM Offers. This "child" record stores a link to every recipient of the e-mail. This means that this piece of key attribute data can itself be used as a selection criteria for a follow-up action to this e-mail.
11. Before you send the completed e-mail to the group you can carry out final proofing by:
    - Using the **Preview** and **Check Spelling** buttons on the E-mail Editor toolbar.
    - Using the **Send Yourself A Test** button.
12. Select the **Send E-mail** button to send the e-mail to all people or companies included in the group. A dialog box is displayed to inform you of the number of e-mails you are about to send.
13. Click **OK**. Select the **Marketing** | **Mass E-mail Status** tab to review the status of the job.



Mass E-mail Status screen

14. At this point, you can temporarily stop the mailer if you wish and resume it later. To do this, select the **Stop** button from the Actions column. The current mailer details remain on the status list until it is resumed and has gone to everyone in the group. **Note**: If the user selects Stop, then the e-mails will remain unsent and have a status of Pending even if they were set to a status of Complete in the Send Mass E-mail Communication Options panel.
15. Select the **hyperlink** in the subject column to view details of the communication.
16. Select the **Click Here To View Recipients Of The Mass E-mail** hyperlink to view a list of people that the e-mail was successfully sent to.
17. Close out of the list and then out of the communication.
18. Select the **Resume** to finish sending the mailer. When all e-mails have been sent successfully, the status bar at the top of the Mass E-mail Status tab displays the following message: "There are no pending mass E-mails". If problems are encountered sending the e-mail, the problem is included on the status list, and you can troubleshoot the problem if you need to. The e-mails sent to the group are saved as communications against the person and/or company that they are sent to. It is also saved against the team and territory you specified on the Communication Options panel and according to the status you selected. You can now review any of the sent e-mails if you wish.

To review a sent e-mail:

- Find a person or company to whom you sent a mass e-mail and open the communication.

  You can convert the e-mail to an opportunity, lead, or case. If the e-mail was linked to a Wave Activity, you can select the **Change** button and register a response to it. Note that to register a response, you must open the E-mail Out from the Communications list in the Person or Company context.

Sending E-marketing E-mails to Groups

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

1. Select **My CRM** | **Groups**, and click on the **hyperlink** of 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 17-22).
5. Select **Save & Send**.

Chapter 17: Campaign Management

In this chapter you will learn how to:

Campaign Set-up and Normal Wave Activities

- Understand how CRM enables you to run marketing campaigns.
- Understand what a wave is.
- Understand what a wave activity is.
- Create a new campaign.
- Create a wave.
- Create a wave activity.
- Understand the fields on the Campaign page.
- Understand the fields on the Wave page.
- Understand the fields on the Wave Activity page.
- Understand the different action types that can be applied to wave activities.
- Clone a campaign.
- Carry out a mail merge using a group.
- Set up response codes that can be used during calls.
- Schedule a follow up call.
- Create a new group based on responses to follow-up calls.
- Report on the success of my campaigns.
- Set up an outbound call handling wave activity.
- Understand the fields on the outbound call list.

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?

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.

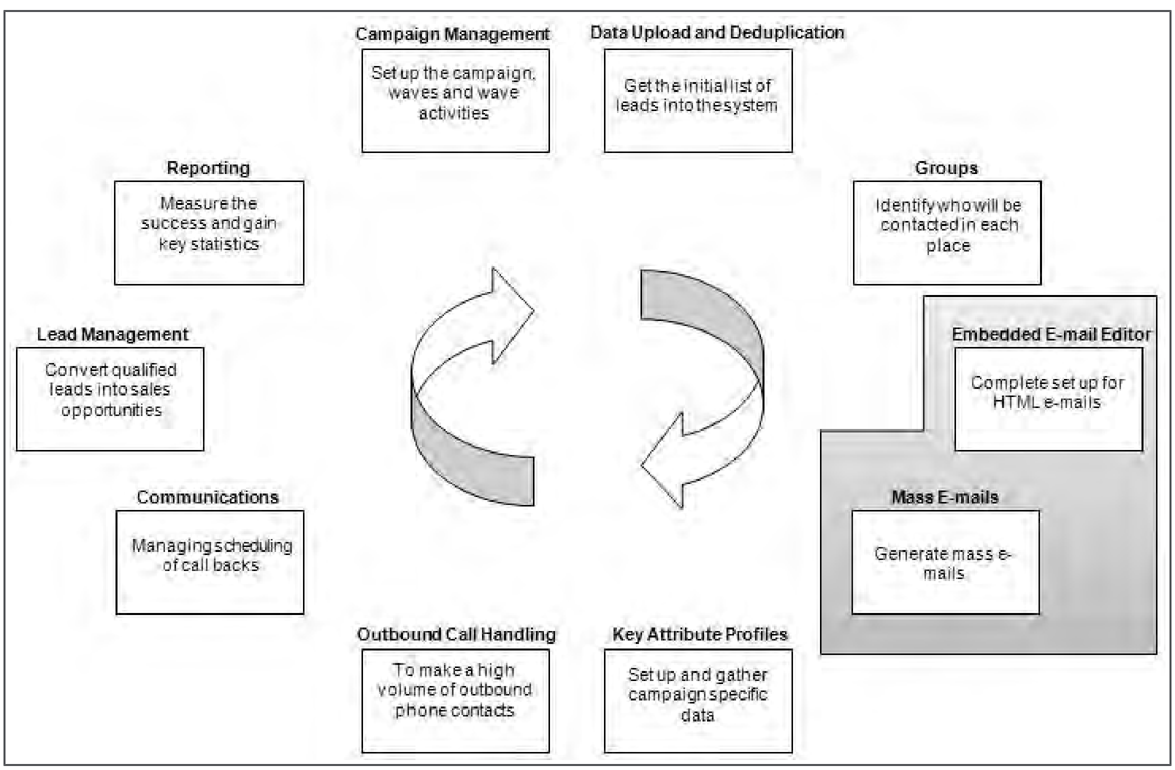
Wave activities: Wave Activities define exactly what action is done for the campaign, for example, Outbound Telesales Activity or Flyer Mailing Activity.

Sage E-marketing for Sage CRM is an integration with Swiftpage (**http://www.swiftpage.com**), which delivers E-marketing e-mail functionality driven from Sage CRM. E-marketing campaigns follow the same basic structure as standard campaigns, but provide additional features such e-mail 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 e-mail 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.



User Requirement: Info Manager Administration Rights

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 e-mail recipients must "opt in" to receiving e-mail from your company, that you clearly identify yourself, and that 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**.

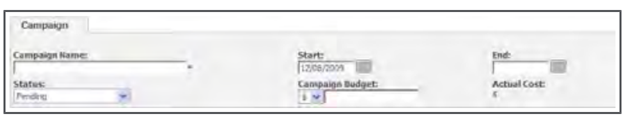
Swiftpage will not e-mail any address, which has opted out of receiving E-marketing e-mails from your company, using the opt-out link in the footer of the e-mail templates. The opt-out flag is synchronized and displayed in CRM on the Company, Person, or Lead summary page associated with the e-mail address that has "opted out". A CRM user can manually check or uncheck the option, however this has no impact on E-marketing e-mails sent from Swiftpage (these will always retain the opt-out flag set from the E-marketing e-mail).

If you are using CRM's own mass e-mail feature, it is recommended that the opt-out flag is added to the group search criteria to ensure that people who have opted out of receiving e-mails via E-marketing, do not receive other marketing e-mails generated using the standard Mass E-mail feature. More information can be found on this in Sending Mass E-mails (page 16-17).

Setting up a New Campaign

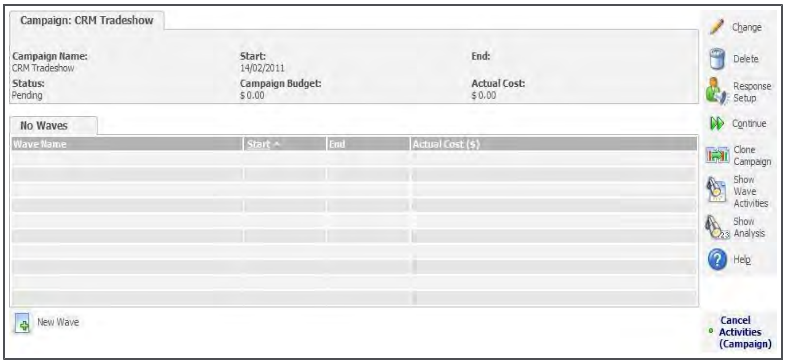
To set up a new campaign:

1. Select the **Marketing** button.
2. Select the **Campaign List** tab.
3. Select the **New Campaign** button.



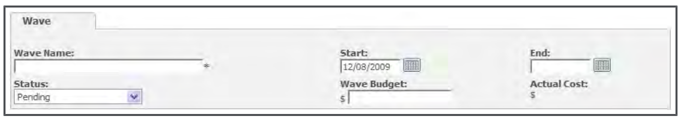
Campaign page

4. Enter the campaign details, and select the **Save** button. The Campaign Summary page is displayed. **Note:** 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, select the Show / Hide Wave Activities buttons.



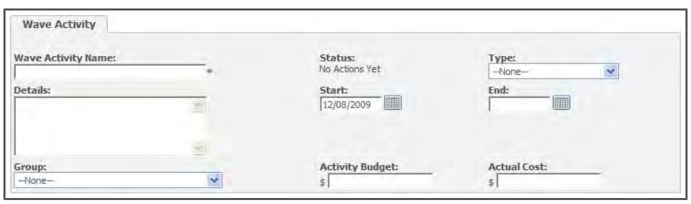
Campaign Summary page

5. Set up the waves, or phases of your campaign, by selecting the **New Wave** button. The New Wave input form is displayed.



New Wave input form

6. Enter the Wave details and select the **Save** button.
7. Set up the Wave Activities by selecting the **New Wave Activity** button. The Wave Activity page is displayed.



Wave Activity page

8. Enter the Wave Activity details and select the **Save** button. You have now set up the framework of the campaign, and can begin on the first wave.

User Requirement: Info Manager Administration Rights

Campaign, Wave and Wave Activity Fields

Note: In most areas of **E-marketing** campaigns, the following special characters are **not** supported: **$ % ^ & ( ) { } [ ] ~ | / ? < > , :**. The following special characters **can** be used in the e-mail 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 17-22), Drip Marketing E-mail Fields (page 17-24), and Outbound Call Fields (page 17-14) 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: Anchor, Duration, or Calendar. **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 e-mail, 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, Cancelled, 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), as subsequent wave activities or “stages” are based on filtered criteria from the original group. **Note**: The group must include an e-mail address field and at least one recipient. For more information on creating groups please refer to Groups (page 16-1).
Get E-mail From	Drip marketing campaigns only. If the source view that the group is based on contains more than one e-mail field, you can select the one you want to use from the Get E-mail Address From field.

Field	Description
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, Cancelled, Finished.
Type	Type of wave activity. For example, Internal Telesales. The Wave Activity Type is used to determine which workflow buttons are displayed to the campaign manager—if Internal Telesales is selected, the workflow button Schedule Telesales is available.The full list of action types is described Campaign Wave Activity Action Types (page 17-7).
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.

Field	Description
Group	The group to be used for this wave activity. Not available for Drip marketing wave activities. Required for E-marketing E-mail wave activities. The group for E-marketing E-mail wave activities must be based on a source view which includes an e-mail 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 on the workflow button to initiate the action. Please refer to Creating a Group from the Groups Tab (page 16-2) for more information.
Activity Budget	Total budget for this wave activity.
Actual Cost	Actual cost of the wave activity.

User Requirement: Info Manager Administration Rights

Campaign Wave Activity Action Types

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. Clicking on the workflow button 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. Clicking on the workflow button 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.

Action	Description
Internal Mail Merge	Displays the workflow button Do Mass Mail Merge. Clicking on the workflow button 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 e-mail 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 e-mail blast on the set date and time, or sends to the e-mail queue for immediate processing. If you are 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. Displays the New Task scheduling page, which allows the scheduling of calls among a selected number of users.
Other	Does not have an associated workflow button. Can be used for, for example, a print advertising phase of the campaign.

User Requirement: Info Manager Administration Rights

Cloning a Campaign

All campaigns can be cloned (normal and E-marketing).

To clone campaign:

1. Select **Marketing** | **Campaigns** or Marketing | **E-marketing**, and click on the hyperlink of a campaign.
2. Select **Clone Campaign**.
3. Give the campaign a new **name**, and select the new **start date**.
4. Select **Save**. The start dates for the Waves and Wave Activities are automatically adjusted to the same offset as the original campaign - but based on the new campaign start date. Cloned Drip Marketing campaigns are not launched until you select the **Launch Drip Marketing Campaign**

button from the Campaign Summary page. **E-marketing E-mail** activities must be edited after cloning to become active.

Carrying out an Internal Mail Merge

This step assumes you have already set up the wave activity and the document template.

To merge the group members with a document template:

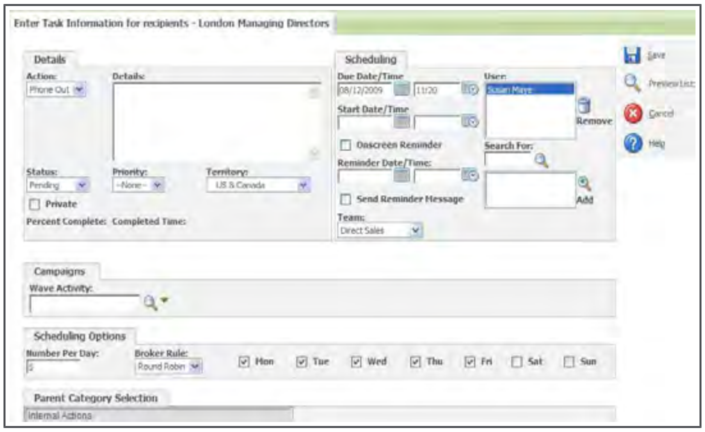
1. Click on the **Marketing** button.
2. Select the **Campaign List** tab.
3. Select the **Campaign Wave Activity** for the mail merge action.
4. Select the **Do Mass Mail Merge** workflow button. The Progress Wave Activity page is displayed.
5. Select the **group** you wish to merge with.
6. Click on the **Save** button. A list of shared templates is displayed.
7. Select the template you want to use from the list.
8. 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.
9. When you are happy with your merged document, click the**Merge and Continue** button to perform the merge.
10. When the merge is complete, click the paperclip icon to view the merged document, or click **Continue** to go to the Save Merged Document as a Communication page. If you do not want to save the merged document as a communication, you can deselect the Create Communication check box.
11. Complete the relevant fields in the Details and Scheduling panels on the Save Merged Document as a Communication page.
12. Select the **Save** button. The Wave Activity Summary page is displayed, with the Status field set to Actions Completed.

User Requirement: Info Manager Administration Rights

Scheduling an Internal Telesales Activity

To schedule follow-up calls for the marketing team:

1. Select the **Wave Activity**. The Wave Activity Summary page is displayed.
2. Select the **Schedule Telesales** workflow button. The Wave Activity Progress page is displayed.
3. Select the group and click on **Save**. The New Task page is displayed with special scheduling options to distribute the calls among the Marketing Team.



New Task page

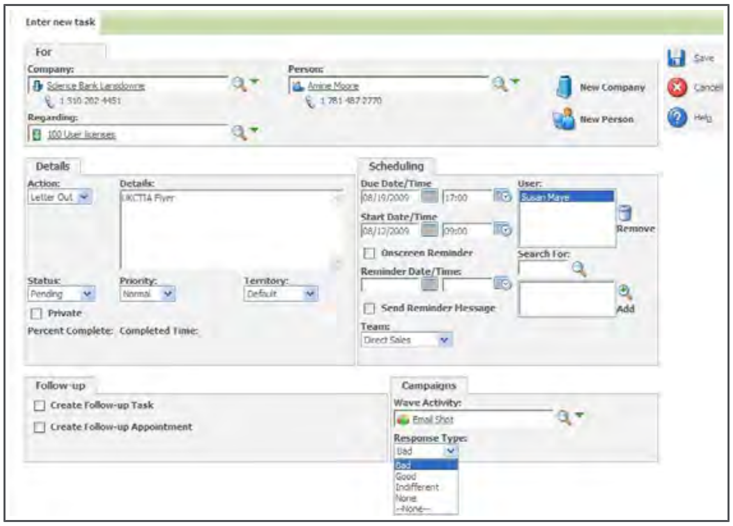
4. Select the members of the team to carry out the calls from the list of users.
5. Set the start date and time from the calendar and time fields.
6. Use the **Scheduling Options** to set the maximum number of calls per day.
   - If the Round Robin Broker Rule is selected, the number of calls per day will be 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.
   - If the Distribute Among Team Users is checked, the calls will be distributed among all users whose Primary Team is equal to the selected Team.
7. Select the **Internal Actions** option in the Parent Category field. The Parent Category field will store the static list of recipients for this particular phone follow-up in Key Attribute Data.
8. Click on the **Save** button. The Wave Activity summary page is displayed. Clicking on the Communications tab within this Wave Activity summary displays the full list of calls that have just been scheduled.

The Marketing Team can now work through the follow-up calls from their respective Calendars, selecting the relevant response code as they complete each call.

User Requirement: Info Manager Administration Rights

Setting up New Response Codes

A standard set of response codes is supplied with a standard installation. These can be captured against any communication, which is linked to a campaign. The standard response codes are Good, Bad, Indifferent, or None. When you schedule, for example, follow-up calls for a mail shot linked to a campaign, the response code can be completed at the end of the telephone call.



Communication with Campaign Response Codes

When all calls are completed, a new group can be created based on people who responded in a certain way. You can define new response codes for each campaign, or even for each Wave Activity within a campaign. Response Codes defined at the Wave Activity level apply to all communications linked to that Wave Activity. If no response codes have been defined at the Wave Activity level, then those defined at the Campaign level will apply to the associated communications. If you do not define any new response codes, the standard 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, it is recommended Key Attribute Profiling and Outbound Call Handling are used to handle this. 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. Select the **Marketing** button.
2. Click on the **hyperlink** of the campaign in which you want to set up the Response Codes. Make sure you are viewing the "expanded" campaign page (click on the Show Wave Activities button if it is visible) and can see the Wave Activities in the Campaign.
3. Click on the **hyperlink** of the Wave Activity in which you want to set up the Response Codes. The Wave Activity Summary page is displayed.
4. Select the **Response Setup** button. The Maintain Lookup Selections page is displayed.
5. Add the 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. Select the **Add** button.
8. Continue adding the rest of the codes and translations.

Response Codes

9. When you have added all of the codes you need, select the **Save** button.

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: that 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 will remain linked to the old code. However, the next time a user links a code to a communication, they will only be able to select from the new list of codes.

User Requirement: Info Manager Administration Rights

Creating a New Group based on Responses

For example, once the Flyer Follow-up calls are complete, the next mail shot needs to go out promoting the upcoming trade show. It has been decided that this will only go to people who expressed an interest in purchasing within the next three to six months.

To create the new group:

1. Select the **Marketing** button.
2. Navigate to the Wave Activity.
3. Select the **Create New Group** button.
4. Select the **Wave Activity and Response Type** to base the new group on, and enter a description of the group. In this example, the Wave Activity is Flyer Follow-up Call, and the Response Type is 3-6 Months.
5. Select the **Preview List** button to review the new group.
6. Click on the **Save** button. The Wave Activity Summary page is displayed.

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

Exporting the Group (page 17-12)

User Requirement: Info Manager Administration Rights

Exporting the Group

To export the new group to a spreadsheet:

1. Select the Wave Activity, for example, **Tradeshow Mail Shot**.
2. Click the workflow button **Create File For External Use**. The Wave Activity Progress page is displayed.
3. Confirm the group to be exported from the Group field.
4. Click on the **Save** button. The Export File Options page is displayed. **Note:** if the output file already exists, it will be overwritten with no warning.
5. Select the **Spreadsheet (CSV)** option. The list of contacts is displayed in spreadsheet format in a new window and can be sent to the external fulfillment house for processing. Complete the communication and export details and select **Save**. This allows a record to be kept against this Wave Activity and against each person in the group. The link to the exported group can also be viewed from the My CRM | Shared Documents tab. Once the wave activities have been completed, the workflow button, Completed, can be used to change the status of the wave activities. The Actual Cost of the wave activities and the Wave Status can also be updated.

User Requirement: Info Manager Administration Rights

Setting up Outbound Call Handling

Setting up Outbound Call Handling for a campaign involves:

- Creating an Outbound Call Wave Activity
- Creating the Outbound Call List

Find out more about outbound call handling in:

Creating an Outbound Call Wave Activity (page 17-13)
Creating the Outbound Call List (page 17-16)
Refreshing the Outbound Call List (page 17-16)
Reallocating Calls (page 17-17)
Setting up Key Attribute Profiling Data on the Call Handling Screen (page 17-17)

User Requirement: Info Manager Administration Rights

Creating an Outbound Call Wave Activity

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 are 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.

To create an Outbound Call Wave Activity:

1. Select the **Marketing** button, and click on the Campaign List tab.
2. Click on the **hyperlink** of the Campaign. The Campaign Summary page is displayed.
3. Click on the hyperlink of the Wave.The Wave **Summary** page is displayed.

4. Select the **New Wave Activity** button. The Wave Activity page is displayed.
5. Type in the **Wave Activity Name** and select **Outbound Call** from the Type field. The Wave Activity page is expanded to display the Outbound Call Details panel and Default Communication Details panel.

Outbound Call Details panel

6. Enter the details on the Wave Activity page and select the **Save** button. The Outbound Call Summary page is displayed, showing workflow buttons relevant to the Wave Activity Type Outbound Call on the lower right-hand side of the page.

User Requirement: Info Manager Administration Rights

Outbound Call Fields

The Wave Activity panel fields are described in Campaign, Wave and Wave Activity Fields (page 17-4). 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.

Field	Description
Category Group	Link to Key Attribute Category Group. Key Attribute Data set up by the System Administrator can be made available to the end user from the Call Handling page.
Users	Users who have rights to access the Outbound Call list from My CRM. Any user can be given access to the call list even if they have a different primary team from the one defined in the team field above.
Priority	Priority of the communication that is automatically created when a user reaches the contact.
Subject	Subject of the communication. This can include merge fields such as #pers_firstname#.
Communication Details	Default Details of the communication.
Wave Items Communications Team	Default Team of the communication.
Territory	Default security territory of the communication.
Send on	Drip Marketing Call Lists only. When the call list should be scheduled. Options vary depending on the Drip Marketing Campaign Type selected (Anchor, Calendar, or Duration). **Anchor** - select the number of days/weeks/months before/after the anchor date at a specified time. **Calendar** - send on a specified date/time. **Duration** - specify the number of days after the contact is added to the campaign, that the call list should be started.This is the number of days after the contact has become a member of the recipient list - for example, 1 day after they opened and clicked the first e-mail they were sent (if Sent To "Contacts from previous e-mail 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**

Field	Description
	• **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 e-mail notification, sent from Swiftpage, a number of days before the stage is executed.

User Requirement: Info Manager Administration Rights

Creating the Outbound Call List

To create the call list:

1. Select 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. Select the **Save** button. 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 tab.

User Requirement: Info Manager Administration Rights

Refreshing the Outbound Call List

New contacts, who meet the selection criteria in the group but who were added to the database after you created the initial call list, can be included in the call list at a later time by refreshing the call list.

To refresh the call list:

1. From the Outbound Call Summary page, select the **Refresh Call List** button. The Progress Wave Activity page is displayed.
2. Select the **Group** that the call list should be refreshed against.
3. Select the **Save** button. The Outbound Call Summary page is displayed. This option runs the SQL in the group again and stores any new contacts who meet the group criteria in the call list.

User Requirement: Info Manager Administration Rights

Reallocating Calls

Calls on the call list are not usually allocated to individual agents (users). The exception to this is if a user has successfully reached one of the people on the list, and there are other people working at the same company still to call. In this case, these calls are preallocated to the user who made the first contact.

If one of the agents is, for example, out sick for the rest of the week, and the campaign is due to end, the Campaign Manager can reallocate these preallocated calls to another agent from the Outbound Call Summary page within the Marketing area of the system.

To reallocate any preallocated calls:

1. Select the **Reallocate Calls** button from the Outbound Call Summary page. The Reallocate Calls page is displayed in a new browser window.
2. Select the users to reallocate the calls from and to and click on the **Save** button. The Reallocate Calls From Users list displays all users who have preallocated calls. The Reallocate Calls To Users list displays all users whose Primary Team is the same as the Reallocate Calls From user. Preallocated calls are reallocated according to the users specified.

User Requirement: Info Manager Administration Rights

Setting up Key Attribute Profiling Data on the Call Handling Screen

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 reported on and used for 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.

Categories page

Question	Answer (s)
Received Invitation	Yes No
Attending Seminar	Yes

Question	Answer (s)
	No
Reason for not attending	Time Budget Not Relevant Other
Interested as	Partner Prospect Journalist
Comments	Text

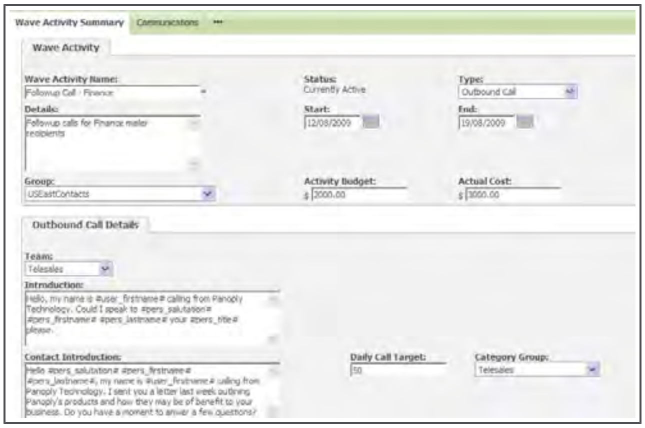
To set up the Call Handling Category Group for Seminar Attendance data:

1. From Administration | Advanced Customization | Key Attributes, select the **Category Groups** tab. A list of category groups is displayed.
2. Select **Call Handling Category Groups** from the list. A list of Call Handling category groups is displayed.
3. Select the **New** button. The Call Handling Category Groups page is displayed.
4. Add the information to the Call Handling Category Groups page. 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	Highlight the categories you want to appear on the call handling screen from the Key Attribute Categories list and move them to the Categories Within Group list using the Add button.
Search String	Allows you to 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. You can change the order using the arrow buttons.
Related Entity	The call handling data must be stored against a CRM entity—for example, Person, Company, Communication. Select the 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.

Field	Description
Preview	Preview displays the selected categories and all of their "children".

5. Select the **Save** button.
6. To link the category group to the Outbound Call Wave Activity, select the **Marketing** button and navigate to the Campaign Wave Activity that you want the data collected for.
7. Click on the hyperlink of the Wave Activity. The Outbound Call Summary page is displayed.



Outbound Call Summary page

8. Select the **Change** button.
9. Select the category group from the Category Group field.
10. Click on the **Save** button. The Outbound Call Summary page is displayed.

    The key attribute profiling data can be viewed and collected from My CRM | Outbound Call Lists by selecting the Outbound Call Wave Activity that you linked the Category Group to. When you Get a Call and click on Got Through, the key attribute data is displayed.

Key Attribute Data on the Call Handling page

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. This can be reported on, used for further group generation, and so on.

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, set up a new tab and link the tab to this Category Group using the Key Attributes action.

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.

User Requirement: Info Manager Administration Rights

Reporting on Opportunities Generated through Campaigns

Within the context of a Campaign the Report tab displays a running status of the success of the campaign:

Any opportunities generated as a result of this campaign should have been linked via the Wave Activity field on the Opportunity to the relevant Wave Activity.

Report tab within a Campaign

You can also use existing or create new reports accessed from the Reports button to measure other information about the campaign.

User Requirement: Info Manager Administration Rights

Setting up an E-marketing Campaign

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 **e-mail address verification** with Swiftpage - once the E-marketing Administrator enables you for E-marketing, an automated verification e-mail is sent to you. Check your Junk or Spam E-mail folder if you have not received it yet.
- You have access to the **Internet** - 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 an E-marketing campaign:

1. Select **Marketing** | **E-marketing**, and click on the **New E-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 17-4).
2. Complete the Campaign fields in New E-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.

7. Complete the E-marketing E-mail fields. These are described in E-marketing E-mail Fields (page 17-22). You can **Preview Recipients** to review the people who will receive the e-mail.
8. Select **Save & Send** to complete Step 3. The E-marketing E-mail Activity Summary page is displayed. If you have not put a date/time in the Schedule Mail field, the e-mail blast gets sent to the e-mail 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 e-mail notification is also sent from Swiftpage including statistics on the number of e-mails sent, bounced, and failed.

   Once any E-marketing wave activity has been completed, and this information has been synchronized back to CRM from Swiftpage, a status banner is displayed at the top of the wave activity.

9. 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 e-mail or any other standard wave activity types.

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

Creating an E-marketing E-mail

An E-marketing E-mail can be created in a number of ways:

- In Step 3 of the E-marketing Campaign wizard. See Setting up an E-marketing Campaign (page 17-20).
- By clicking the New E-marketing E-mail button from My CRM | Groups. See Sending E-marketing E-mails to Groups (page 16-20).
- By adding an E-marketing E-mail wave activity to an existing E-marketing or normal campaign. See below.

To create an E-marketing e-mail:

1. From either **Marketing** | **Campaign List** or **Marketing** | **E-marketing**, click on the hyperlink of a campaign. **Note**: If you are 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 select **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 17-22). You can select **Preview Recipients** to review the people who will receive the e-mail.
5. Select **Save & Send**. If you have not put a date/time in the Schedule Mail field, the e-mail blast gets sent to the e-mail 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 e-mail notification is also sent from Swiftpage including statistics on the number of e-mails 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 e-mail

or any other standard wave activity types.

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

E-marketing E-mail Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Subject</td><td>The subject line for the e-mail. The following special characters must not be used in this field: ^ { } [ ] ~ | / < ></td></tr>
<tr><td>Send As</td><td>Choose from a drop-down of enabled and verified E-marketing users. You can select active or inactive E-marketing users to send the e-mail from. The e-mail is sent from the e-mail address associated with the selected user.</td></tr>
<tr><td>Group (Recipients)</td><td>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.</td></tr>
<tr><td>Get E-mail Address From</td><td>Select the source of the e-mail address. All e-mail 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 e-mail to.</td></tr>
<tr><td>Template</td><td>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 e-mail, 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 17-26) for more information.</td></tr>
<tr><td>View/Edit Template</td><td>Allows you to preview and edit the template in the Swiftpage Template Manager.</td></tr>
<tr><td>Personal Message</td><td>A short block of text specific to this wave activity, which can be added as a merge field to an e-mail 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: ^ { } [ ] ~ | / < ></td></tr>
<tr><td>Schedule Mail</td><td>Set the date and time to send the e-mail blast, or leave blank to send to the e-mail queue for immediate processing.</td></tr>
</table>

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

Setting up a Drip Marketing Campaign

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 have completed the **e-mail address verification** with Swiftpage - once the E-marketing Administrator enables you for E-marketing, an automated verification e-mail is sent to you. Check your Junk or Spam E-mail folder if you have not received it yet.
- You have access to the **Internet** - 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. Select **Marketing** | **E-marketing**, and click on 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 17-4).
   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 e-mail 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 17-24).
8. Select **Preview Recipients** to review the people who will receive the e-mail.
9. Select **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 are 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 the **Suspend Drip Marketing Campaign** button.

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

Creating a Drip Marketing E-mail

A Drip Marketing E-mail can be created in a number of ways:

- In Step 3 of the Drip Marketing Campaign wizard. See Setting up a Drip Marketing Campaign (page 17-23).
- 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. Select **Marketing** | **E-marketing**, click on the hyperlink of 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 select **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 17-24).
5. Select **Save**. A Drip Campaign communication is created for the user and can be viewed from My CRM | Calendar. Once the e-mail 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 e-mail or any other standard wave activity type.

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

Drip Marketing E-mail Fields

Field	Description
Subject	The subject line for the e-mail. 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 e-mail, 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 17-26) 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 e-mail.
Send On	When the e-mail should be sent. Options vary depending on the Drip Marketing Campaign Type selected (Anchor, Calendar, or Duration).

Field	Description
	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 e-mail 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 e-mail (if Sent To "Contacts from previous e-mail stages, matching Response Clicked A Link" was selected).
Send To	Who the e-mail 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 e-mail notification, sent from Swiftpage, a number of days before the stage is executed.

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

Creating a Drip Marketing Call List

To create a Drip Marketing Call List wave activity:

1. Select **Marketing** | **E-marketing**, click on the hyperlink of 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 select **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 17-14). You must assign either a team, or one or more users, to carry out the Drip Marketing Call List wave activity.

5. Select **Save**. A Drip Campaign communication is created for the user and can be viewed from My CRM | Calendar. Once the e-mail 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 e-mail, another Drip Marketing call list, or any other standard wave activity type.

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

Editing E-marketing E-mail Templates

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 e-mail 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 e-mail is going out to. The field name must be enclosed in double square brackets, for example, **[[pers_title]]**.

Click on the help button within Swiftpage for further assistance.

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

Analyzing E-marketing Campaigns

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 on the hyperlink of, 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 on the hyperlink to open the Wave Activity Summary page.
Submitted	The number of e-mails that were submitted for sending (the number of the recipients in the group).
Sent	The number of e-mails actually sent (submitted minus duplicate, invalid, or opted out e-mail addresses).
Unsent	The number of e-mails that were not sent due to duplicate, invalid, or opted out e-mail addresses.
Bounced	The number of e-mails that bounced back due to invalid e-mail addresses or domain names. **Note**: When an e-mail bounces back **three times** from the same e-mail address within a 60-day period, the fourth and further times that the same e-mail address is blasted, the e-mail does not go out, and is counted as **Unsent**.
Unique Opens	The number of individuals, who opened the e-mail, regardless of how many times they opened it.
Unique Clicks	The number of individuals, who clicked on any link in the e-mail. An individual can only count once per link within an e-mail.

Column	Description
Total Clicks	The total number of times any of the links were clicked on within any of the e-mails 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 e-mail • Number of times they opened the e-mail • 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 e-mail • Number of times they opened the e-mail The report is sorted by the local time column.
Unique Opens By E-mail	Shows the number of times each recipient opened the e-mail, sorted by e-mail address.
Opens By E-mail	Shows the local time that the e-mail was opened, sorted by e-mail address.
Opens By Time	Shows the local time that the e-mail was opened, sorted by opened time.
Unique Clicks By Link	Shows the address of each link in the e-mail, and the e-mail 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 e-mail address.
Clicks By Link	Shows the first click and total number of clicks for each link, sorted by e-mail address.
Unopened	Shows a list of recipients where the e-mail remained unopened.
Bounced	Shows a list of recipients where the e-mail bounced.
Unsent	Shows a list of recipients where the e-mail was unsent and a reason (supplied by Swiftpage).

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

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 e-mail address associated with your E-marketing user profile (your "Send From" address).

To edit your E-marketing User Profile:

1. Select **My CRM** | **E-marketing User Profile**, and click on the **Change** button.
2. Update the details, for example, your e-mail address.
3. Click **Save**. If you change the e-mail address, the verification e-mail is **automatically** resent.
4. Go to your e-mail inbox and click on the verification link to complete the change. You can click the **Resend Verification E-mail** button if you delete the first e-mail 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 18: Cases

In this chapter you will learn how to:

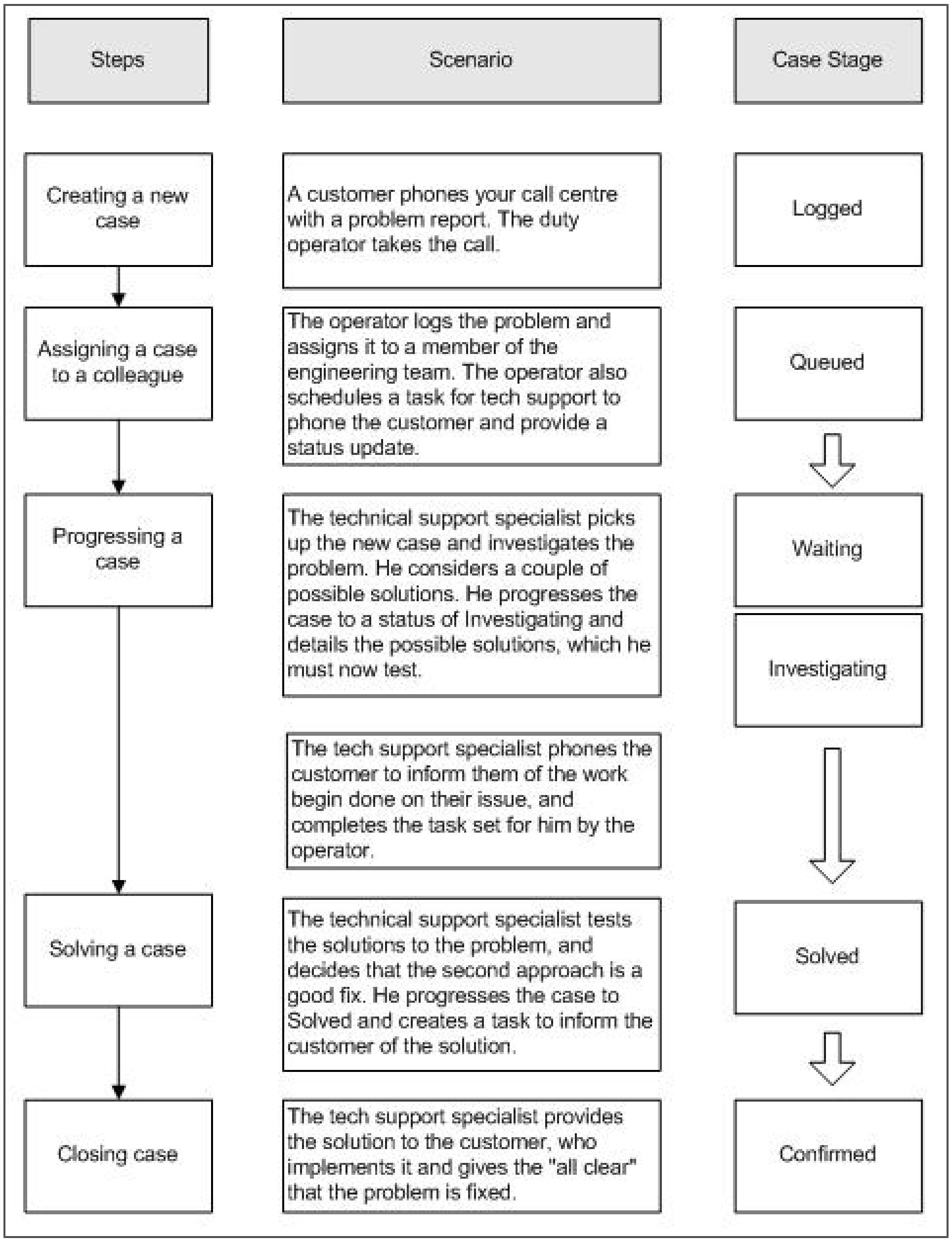
- **Define what a case is**.
- **Understand the fields on the case screen**.
- **Know if a case is within an SLA**.
- **Create a new case**.
- **Assign a case to a colleague**.
- **Progress the status of a case**.
- **Solve a case**.
- **Close a case**.
- **View the case pipeline**.
- **Run a case report**.
- **Find out what cases I am working on**.
- **Delete a case**.

What is a Case?

A Case in CRM is a Customer Service issue.

In CRM you can capture a customer query and track the progress of the problem through to a solution and closure.

Solving a Problem: Scenario



Creating a New Case

To raise the customer service issue:

1. Find the customer.
2. Click on the **hyperlink** of the company.
3. Select the **Cases** tab, and click on the New button. Alternatively, you can right-click on or hover over the New menu button and select Case to log a new case. The Log New Case page is displayed.

Case Details page

4. Add as much information as you know at this stage to the case details.
5. Select the **Save** button. The Case Summary page is displayed.
6. Select the **Continue** button. The Case is displayed in the list of cases on the Cases tab.

Case Fields

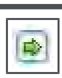
Field	Description
Company	Company that the case is with.
Person	Main contact person for the case.
RefId	Automatically generated reference Id for the case. Made up of [User Number] - [Automatic Counter].
Found In	Which version of the product the problem was found in.
SLA	Service Level Agreement. If None 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, E-mail, Fax.
Customer Ref	Customer's own reference identifier.
Product	Which product the customer has a problem with.

Field	Description
Fix In	Product version that a fix is due to be supplied in.
Territory	Security territory. For more information, please refer to Territory Management (page 4-7).
Created By	Person the case is logged by.
Severity	Severity of the case. For example, Normal, Low, High.
Assigned To	Person currently responsible for the case.
Stage	Stage of the case. For example, Logged, Queued, Investigating.
Status	Status of the case. For example, In Progress, Closed.
Problem Type	Type of problem. For example, Customer knowledge, Missing component.
Problem Details	Detailed description of problem.

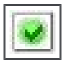
When you save the Case, the following additional fields are displayed in read-only format. They are available for editing on the Progress Case screen at the relevant point in the customer service workflow process.

Field	Description
Team	Team responsible for the case.
Solution Type	Type of solution. For example, Replace component, On-Site Engineer.
Solution Details	Detailed description of solution.
Closed	Date the case is closed.

This table explains the Case Status icons.

Status Icon	Description
	In Progress
	Closed

This table explains the SLA Status icons.

SLA Status icon	Description
	The check mark icon indicates that the Case is within the target close time specified in the SLA.
	The minus sign icon indicates that the Case has reached the warning percent level, set by the System Administrator, without being closed. For example, if the SLA specifies that Medium SLA Severity cases should be closed within 30 hours, and the Warning Percent has been set to 80%, then the yellow minus sign icon is displayed next to all Medium SLA Severity cases if the case is still open after 24 hours.
	The cross icon indicates that the Case has breached the SLA.

Assigning a Case to a Colleague

If your system has Case Workflow enabled, you will see a number of workflow bullets on the right-hand side of the Case Summary page. The workflow bullets available to you will vary depending on how the case workflow has been set up and customized to suit your customer service process.

Case Workflow buttons

To assign a case to a colleague using the workflow:

1. From within the context of a logged case, select the **Queue** workflow bullet. The Progress Case page is displayed.

   Progress Case page

2. Enter the user the case should be assigned to in the Assigned To field.
3. Add a Tracking Note providing additional information.
4. Select the **Save** button.
5. Your workflow may be set up to automatically create a follow-up call for your colleague. If not, select the **New** menu button, and select **Task**. The Enter New Communication page is displayed. You will notice that the task is automatically linked to the case in the Relating To field.
6. Complete the communication details, and select the **Save** button. 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 the 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 e-mail regarding the case.

To make the follow-up call and progress the case:

1. Select the **My CRM** button.
2. Click on the **Cases** tab. A list of all cases assigned to the current user is displayed.
3. Click on the case **Status** icon. The Summary page of the case is displayed.
4. Select the **Investigating** workflow bullet. The Progress Case page is displayed.
5. Add a Tracking Note, and select the **Save** button. The Case Summary page is displayed.

   All changes made to the Case from the Progress Case page 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 the tech support specialist is satisfied with a solution, the case can be progressed again to the next stage of Solved.

- This time, when the case is progressed, the Solution Type and Solution Details should be filled in.

Case Progress page

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 My CRM area, 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 have the potential of being 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 have 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 does not 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.

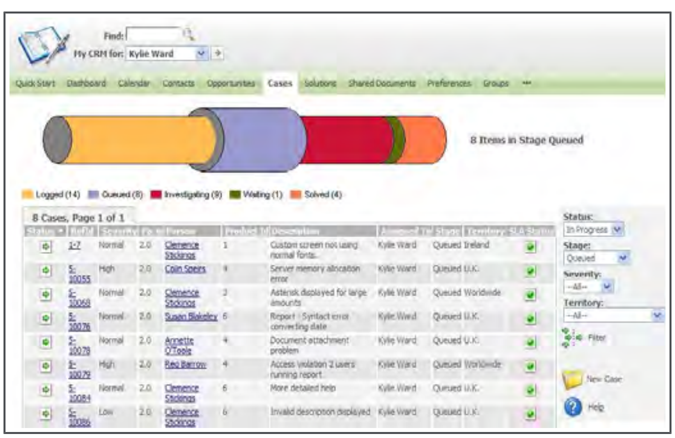
Viewing the Case Pipeline

To view a graphical representation of your Cases:

- Select the **My CRM** button.
- Click on the **Cases** tab.

A list of Cases assigned to you, with a status of In Progress, is displayed. A graphical pipeline of your cases is displayed above the list.

You can drill down on the pipeline by clicking the pipeline segment representing the case stage you want to zoom in on. Alternatively, you can also click on the hyperlinks under the pipeline image. For example, if you want to see cases at a stage of Queued, click on that section of the pipeline.



Drilling down on the Case pipeline

The pipeline graphic can be disabled from the Preferences tab.

The list of cases is filtered to show only cases at a Stage of Queued. You can toggle back to the full list of cases by clicking on the highlighted segment of the Case pipeline.

Running a Case Report

Case Summary reports provide a quick overview of a particular customer service issue. To generate a summary report for a case:

1. Find and open the case you want to generate the report for.
2. From the Case Summary page, select the **Summary Report** button.

   The report is displayed in PDF format.

Determining which Cases you are Working on

To find out which cases you are currently working on:

- From within My CRM, select 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

The ability to delete cases depends on your security profile. If your profile allows you to delete cases, a Delete action button is available on the Case Summary page when you are in edit mode. Contact your System Administrator if you need to be able to delete cases but the button is not available to you.

To delete a case:

1. Find and open the case you want to delete.
2. From the Case Summary page, select the **Edit** button.
3. Click on the **Delete** button and then on the **Confirm Delete** button to delete the case.

   The case record is deleted from the system.

Chapter 19: Knowledge Base

In this chapter you will learn how to:

- **Define what a solution is**.
- **Find solutions**.
- **View solutions from My CRM**.
- **Add a new solution**.
- **Understand the fields on the solution screen**.
- **Creating a new solution from a solved case**.
- **Link a solution to a case**.
- **Publish a solution**.
- **Delete a solution**.
- **E-mail a solution to a customer**.

What is a Solution?

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.

Note: Your System Administrator must give you rights to access Solutions for you to be able to work with them.

Solution Fields

The fields are explained in the table below.

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.

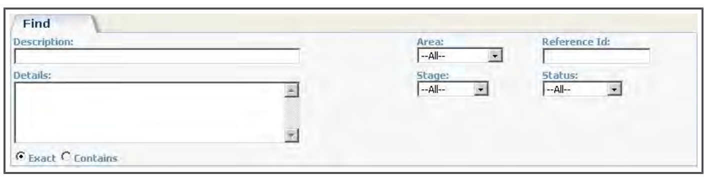
Field	Description
Team	Team responsible for the solution.
Stage	Solution Stage. For example, Draft, Rejected, Reviewed.
Status	Solution Status. For example, Not Published, Published.
Assigned To	Person responsible for the solution.

Finding Solutions

The following query arrives in your support@panoply.com mailbox: "How do I import from MS Excel?".

To search for existing solutions:

1. Right-click on or hover over the **Find** menu button, and select **Solution** from the pop out list.



Solution Find page

2. Type a keyword in the Description or Details field (for example, Excel), and select the **Contains** radio button. This will search for all solutions containing the keyword you have typed in. Add more search criteria if you need to narrow the results of the search even further. **Note:** You can also use the % wildcard to turn the search into a "contains" search.
3. Select the **Find** action button. A list of all Solutions meeting your search criteria is displayed.
4. Click on the **hyperlink** of the Solution you want to review. The Solution Summary page is displayed. This should give you enough detail to respond to the initial query.

Viewing Solutions from My CRM

Once the System Administrator has given you rights, you can access Solutions from the Solutions tab within Cases or by selecting Solution from the Find menu button. If you are 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. To set this up:

1. Select the **My CRM** button.
2. Click on the **Preferences** tab, and select the Change button.
3. Set the **Show Solutions In My CRM** field to Yes.
4. Select the **Save** button. The Solutions tab appears in the My CRM tab group immediately.

Solutions tab in My CRM

Adding a New Solution

To add a new solution:

1. Right-click on or hover over the **New** menu button, and select **Solution** from the pop out list. The New Solution page is displayed.

New Solution page

2. Enter the details.
3. Select the **Save** button. The Summary page for the new solution is displayed.

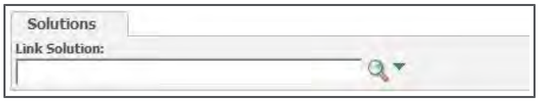
From within the context of a Solution:

- You can use the New E-mail button to send an e-mail relating to the contents of the Solution.
- You can use 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.

Adding a New Solution from a Case

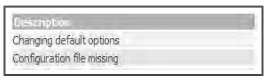
While you are working on a case, or once it is solved, you can add and track possible and actual solutions from the Solutions tab.

1. Open the Case so that the Case Summary page is displayed.
2. Click on 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, select the **Link Solution**button. The Solutions panel is displayed.



Solutions panel

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 on 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 on the second magnifying glass icon and the standard Search Select page is displayed in a new window.



Advanced Search Select results

5. Click on the **hyperlink** of the solution you want to link to this case.
6. Select the **Save** button. The linked solution is displayed in the list of Solutions.

Publishing a Solution

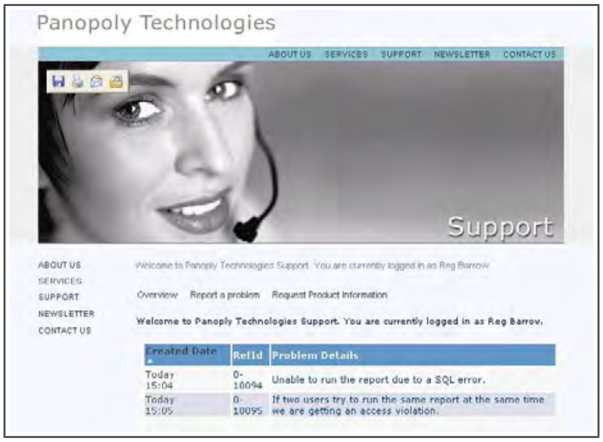
Customers can be given rights to view and search through all published solutions from your external Web site.

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 on 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 select the **Save** button.
4. Select the **Publish** workflow button.
5. You can add a tracking note, and select the **Save** button. 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.



Finding a solution from a Self Service Web site

Deleting a Solution

The ability to delete solutions depends on your security profile. If the Delete action button is not available to you but you want to be able to delete solutions, contact your System Administrator.

To delete a solution:

- Open the solution so that the Solution Summary page is displayed.
- Click on **Change**.
- Select the **Delete** action button and then select **Confirm Delete** to delete the record.

Linking a Solution to a Case

To link a solution to a case:

1. Open the solution so that the Solution Summary page is displayed.
2. Select the **Cases** tab and click on the Link Case button.
3. Find the Case you want to using the search select icons.
4. Once the case is displayed in the **Link Case** field, select Save.

E-mailing a Solution

To e-mail a solution:

- Open the solution so that the Solution Summary page is displayed.
- Select the **Send E-mail** button. The solution details are included in the e-mail body.
- Complete the rest of the e-mail details, including the recipient and select **Send** to send the e-mail to the customer.

Chapter 20: Interactive Dashboard

In this chapter you will learn how to:

Dashboards

- Understand what to use a dashboard for.
- Access the interactive dashboard.
- Quick start with the interactive dashboard.
- Select a dashboard.
- Set a default dashboard.
- Creating a dashboard from a template.
- Copy a dashboard.
- Create a new dashboard.
- Modify dashboard details.
- Delete a dashboard.
- Set up a company dashboard.

Gadgets

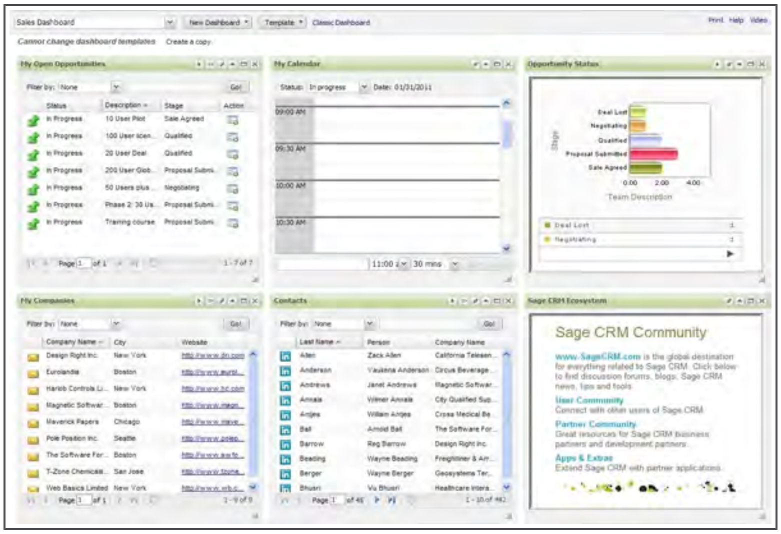
- Add a gadget template to a dashboard.
- Add a new gadget to a dashboard.
- View the gadget quick reference.
- Edit gadget content.
- Link gadgets.
- Modify gadgets.
- Add more data sources for gadgets.

Templates

- Work with dashboard templates.
- Add a dashboard template.
- Assign users to a dashboard template.
- Modify a dashboard template.
- Delete a dashboard template.
- Manage user dashboards.
- Add a gadget template.
- Modify a gadget template.
- Delete a gadget template.
- Add an SData feed template.

What is the Interactive Dashboard?

The interactive dashboard is a highly-customizable workspace where you control what information you need 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.



Interactive Dashboard

1. Control Bar

Holds the buttons and sub-menus to select and build dashboards and gadgets. You can also Turn Snap On/Off (snap-to-grid for flexible dashboard layout), access help, and return to the Classic Dashboard page from the control bar.

2. Status Bar

Displays the name and category of the dashboard, and shows if you are working with a dashboard template. You must be an Info Manager or System Administrator to edit and save changes on a template.

3. Gadget

Gadgets feed information from multiple data sources, internal and external to CRM, into your workspace. They are also platforms to carry out tasks and actions from, such as logging a new case or progressing a sales opportunity through a workflow.

4. Workspace

Displays gadgets. Gadgets can be dragged and dropped, resized and overlapped, columns within gadgets can even be dragged and dropped - all to create the best workspace for your type of job and style of working.

Accessing the Interactive Dashboard

To access the interactive dashboard:

- Select **My CRM** | **Dashboard**.

  A welcome dashboard is displayed.

Accessing the Interactive Dashboard after the first Logon

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.

Quick Start

This example assumes your system includes either the standard CRM demo data, or at least one dashboard template and one gadget template set up by an Info Manager or System Administrator.

The quickest way to get up and running with the interactive dashboard is to:

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. Select **New Gadget** | **Choose Template** to add more predefined gadgets.
6. Use the **Edit** button on the **gadget headers** to modify existing gadgets, or create your own custom gadgets 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

To select a dashboard:

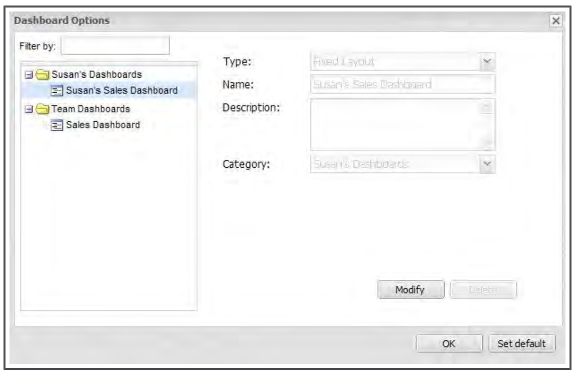
1. Click **My CRM** | **Dashboard**, and click on the dashboard **drop-down** arrow. A list of dashboards is displayed.
2. Select the dashboard you want to display on your workspace.

The dashboard is displayed on your workspace. 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, you can select the **Create a copy** link on the status bar. The copied dashboard can be modified by you.

Setting a Default Dashboard

To set a default dashboard:

1. Select **My CRM** | **Dashboard**, click on the Dashboard drop-down arrow, and select Dashboard Options. If a default dashboard has already been set, a check mark icon is displayed next to the current default dashboard.



Dashboard Options

2. Use the **Filter by** field to narrow the list of dashboards. The Filter by 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. Highlight the category and select **Modify Category**. A category containing dashboards cannot be deleted. The **No Categor**y category can only be modified by the System Administrator via Administration | Translations.
3. 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.
4. 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 select **Clear Default**.

Creating a Dashboard from a Template

To create a new dashboard from a template:

1. Click **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. The Filter by 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 select **Modify Category**.

3. Highlight the dashboard you want to display on your workspace, and click **OK**. The Dashboard Details dialog is displayed.
4. Give the dashboard a **name**. The **category** can also be updated from this dialog box.
5. Click **OK**. The new dashboard is displayed on your workspace with the updated name and can be modified to suit your needs.

Copying a Dashboard

You can copy a dashboard by either selecting the **Create A Copy** hyperlink from a Dashboard Template, or by using the **Copy** button within the Dashboard Options dialog.

To copy a dashboard from Dashboard Options:

1. Select **Dashboard Options** from the dashboard drop-down.
2. Highlight the dashboard you want to copy.
3. Select **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. Select **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. Select **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 20-21) for more information.

Creating a New Dashboard

To create a new dashboard:

1. Select **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 freestyle 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 a new one created 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

To modify dashboard details:

1. Select **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

To delete a dashboard:

1. Make sure the dashboard you want to delete is **not** displayed on your workspace.
2. Select **My CRM** | **Dashboard**, and select **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.

Adding a Gadget Template to a Dashboard

Gadget templates are predefined by a System Administrator or Info Manager. A normal 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.

To add a gadget template to a dashboard:

1. Make sure the dashboard you want to add the gadget template to is displayed on your workspace.
2. Select **New Gadget** | **Choose Template**. The Gadget Template dialog box is displayed showing a list of all gadget templates grouped by gadget type.
3. Click 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

To add 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. Select **New Gadget** | **Create Gadget**. The Gadget wizard is displayed.
3. Select the type of gadget you want to add. Please refer to the Gadget Quick Reference (page 20-7) for more information.
4. Complete the gadget wizard steps. The new gadget is displayed on your dashboard.

Gadget Quick Reference

Gadget	Description
Calendar Gadget (page 20-8)	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 20-8)	Display a report chart, drill into the associated report search criteria, run the full report, and use built-in animation.
List Gadget (page 20-9)	View, filter, and carry out actions on lists. Can be linked to other list and record summary gadgets for dynamic filtering.
Main Menu Item Gadget (page 20-10)	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 20-11)	View and drill into notification alerts, dismiss or snooze individual or all notifications.
Record Summary Gadget (page 20-11)	View a CRM record's summary page. Must be linked to a list gadget to display data.
RSS Feed Gadget (page 20-11)	Displays an RSS feed. User Name and Password details can be preset for feeds requiring authentication.
SData List Gadget (page 20-11)	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 20-13)	View an SData record's summary page. Must be linked to an SData list gadget to display data.

Gadget	Description
Summary Gadget (page 20-13)	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 20-14)	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.
Web Site Gadget (page 20-14)	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 Web Site Gadget (page 20-14) 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 on 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. The Filter by field works on a "Begins with" basis.
3. Click **Next**.
4. 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. When you click on the Action icon, the report Display Options and Search Criteria page is displayed.
5. Select the **Default Action** option from the drop-down field. **Run Report** adds a hyperlink to the report chart, which runs the full report. Default search criteria are applied to the report if they exist. **Note**: If you want to use the animation directly from the chart on the dashboard, make sure Default Action is set to **None** -otherwise the full report is displayed - but 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, please refer to Running a Report (page 10-1).

List Gadget

To add a new list gadget:

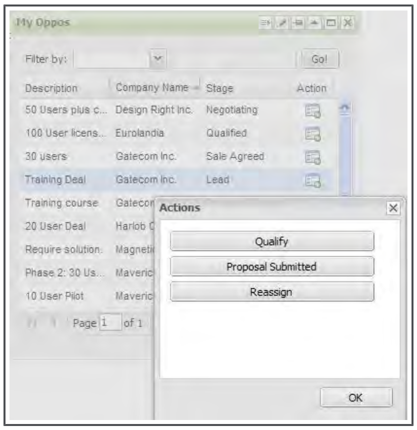
1. Click **List** from the Gadget Wizard. A list of entities is displayed.
2. Select the **entity** to base your gadget on from the list.
3. Click **Next**. A list of data sources, grouped by type (Group, Report, Saved Advanced Find, Saved Search) is displayed.
4. Select the data source to base your gadget on from the list. Use the **Filter by** field to narrow the list. The Filter by field works on a "Begins with" basis.
5. Click **Next**. A list of columns available to display on the gadget is displayed.
6. Click the **check box** next to the columns you want to display on the gadget, or click **Select All**. The number of records to display per page of the gadget defaults to **10**. This can be changed in the **No. Of Rows** field.
7. Click **Next**.
8. 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

9. Select the **Default Action** option from the drop-down field. Setting a Default Action adds a column displaying an icon next to each record in the gadget. The selected action is launched when you click on the icon:

- **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 E-mail**. Creates an e-mail, using the context details of the selected record.

10. Select the **Display Workflow Anchor Column** check box to add an Action column to the gadget. When you click on the icon in the Action column, the workflow actions relating to the current record can be launched.



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

11. Click **Next**.
12. Add a **Name** and **Description** for the gadget.
13. 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.
   - For URL, type the web address (in the format http[s]://www.website.com) and a name for the link.
   - CRM gives you access to the next field as a drop-down list containing main menu items. Select the main menu item and add 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 on 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. Select the **entity** to base your gadget on from the list.
3. Click **Next**. A list of record summary blocks is displayed.
4. Select the **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 20-15) 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**

    Please refer to the **Developer Help** for more information on constructing custom SData feeds.
  - 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. Select the **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, select **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 is passed all of 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 entity <*SData gadget row entity name*>.

The SData Navigator is also passed all of 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 20-11).
3. Click Next.
4. Select the **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 20-15) for more information.

Summary Gadget

To add a new 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, you can 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 on 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. Select **Modify Dashboard** | **Add New Gadget**.
2. Select the **Task List** gadget.
3. Add a **Name** and **Description** for the gadget.
4. Click **Finish**.

Once the Task List gadget is on your dashboard you can:

- Drill into a task by clicking on 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 on 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 20-15) for more information.

Web Site Gadget

To add a new web site 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:

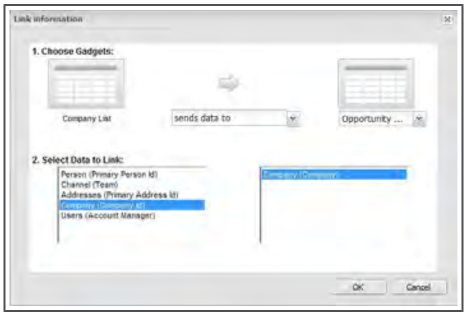
1. Select the **pencil icon** in the gadget header. The first step of the gadget wizard for the current gadget is opened.
2. Make the changes to gadget.
3. Click **Finish**. The updated gadget is displayed on the dashboard.

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.

To link gadgets:

1. Select 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. Select 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. Select 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. Select, 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. Select, for example, **Company (Company)**.



Link information dialog

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 on 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 are 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.

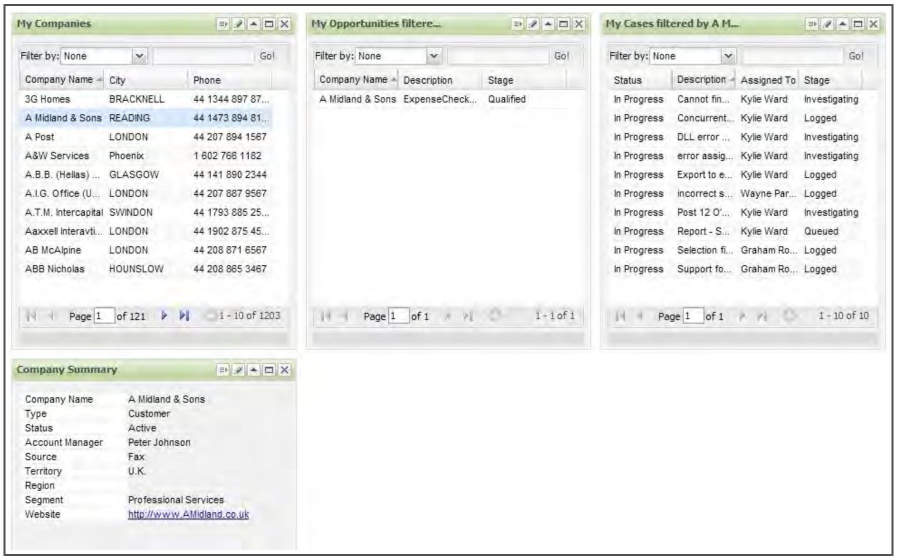
The following examples show how this can be set up in practice.

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.

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.

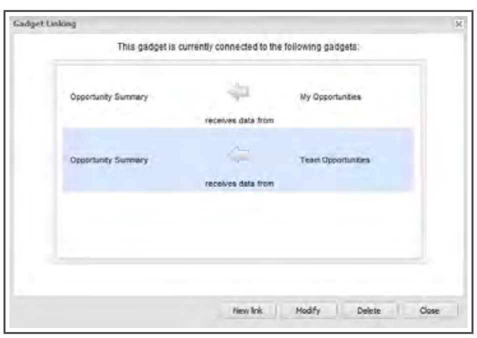


Gadget linking between one sender (My Companies list) and multiple receivers (My Opportunities list, My Cases list, and Company Summary gadget)

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.

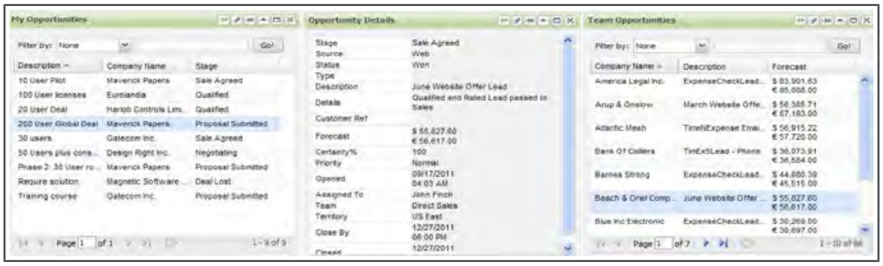
Example 2: Sending data from two different Opportunity List gadgets to one Opportunity Summary gadget

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).



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.

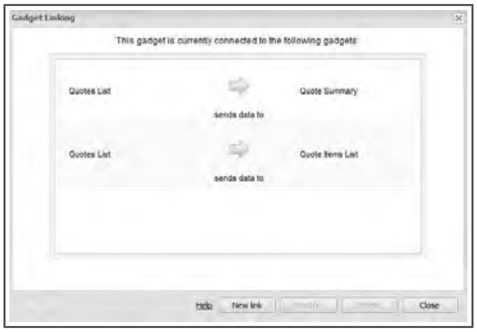


Gadget linking between one receiver (Opportunity Summary gadget) and multiple senders (My Opportunities list, Team Opportunities list gadget)

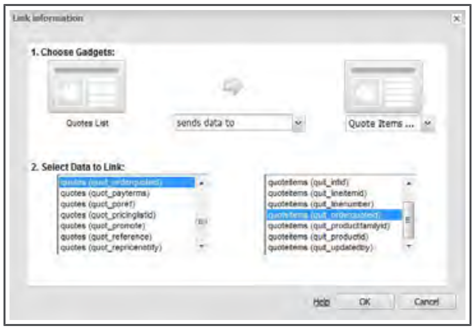
In the example described above, both opportunity list gadgets are senders, and the summary gadget is the receiver. This can save you space on your dashboard, as you can easily toggle the view on a single receiver gadget between the two sender gadgets.

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) .

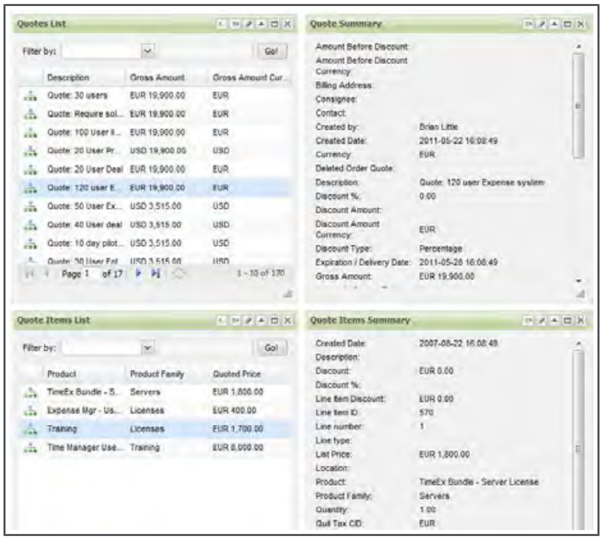


Gadget linking dialog on SData Quotes List



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.



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 20-24) 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 20-15) 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:

Customizing list gadget column layout

- **Drag and drop** the columns to the desired layout.
- Switch the **sort order** between ascending and descending, by clicking on the current sort order column heading.
- Click on 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

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 16-1)

Writing Reports (page 23-1)
Creating a New Saved Search (page 3-13)
Using Advanced Find (page 3-7)
Adding an SData Feed Template (page 20-21)

When working with data sources for the interactive dashboard please note:

- 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 gadget report data sources.
- Users must be given access to **Enterprise Reports** (in **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**.
- Care must be taken 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.

Adding an SData Feed Template

To add a new SData feed template:

1. Select **Template** | **SData Feed Templates** | **New**.
2. Enter a short description for the feed in the **Feed Name** field.
3. 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**

     Please refer to the **Developer Help** for more information on constructing custom SData feeds.
4. 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.
5. To assign teams or users to the SData feed, select the **Assigned Users** tab.
6. Select the **check boxes** next to the users and/or teams that you want to assign the SData feed template to.
7. Click **Save**. Each assigned user or member of the assigned team can access the SData feed from Step 1 of the SData gadget wizard.

User Requirement: Info Manager Administration Rights

Working with Dashboard Templates

Dashboard Templates are accessed via **Template | Dashboard Templates**.

Once in Dashboard Templates with the **Properties** tab active, you can manage all the template and user dashboards using the following fields, buttons and tabs:

Field or Button	Description
Filter by	Searches template or user dashboards and categories using a "Begins with" search.
Template	Displays a list of all template dashboards.
User	Displays a list of all user dashboards.
New	Adds a new dashboard template.
Modify Details	Changes the name, description and category of a template or user dashboard. The "No Category" category cannot be modified from the Dashboard interface, however a System Administrator can modify the category name from 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.

User Requirement: Info Manager Administration Rights

Adding a Dashboard Template

To add a new dashboard template:

1. Select **Template** | **Dashboard Templates** | **New**.
2. Set the Type to **Flexible** or **Fixed** Layout. Defaults to Flexible. The type cannot be switched once the dashboard has been added.
3. Add a **Name**, **Description**, and **Category**. The dashboard name is a required field.
4. Click **Save**. The template dashboard is displayed in the list of templates. You can open the new template and add gadgets to it by selecting the **Modify Gadgets** button.

User Requirement: Info Manager Administration Rights

Assigning Users to a Dashboard Template

To assign users to a dashboard template:

1. Select **Template** | **Dashboard Templates**.
2. Make sure the **Template** radio button is selected.
3. Highlight the dashboard you want to assign users to.
4. Select 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 **Save**. 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.

User Requirement: Info Manager Administration Rights

Modifying a Dashboard Template

To modify a dashboard template:

1. Select **Template** | **Dashboard Templates**.
2. Make sure the **Template** radio button is selected.
3. Highlight the dashboard you want to modify.
4. Click **Modify Details** to change the **Name**, **Description**, or **Category** of the dashboard.
5. Click **Modify Gadgets** to change the gadgets on the dashboard. The template dashboard is displayed with a message that changes may affect other users. **Note**: Any users assigned to the template will see the changes next time the assigned dashboard is accessed.

While you are 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".

User Requirement: Info Manager Administration Rights

Deleting a Dashboard Template

To delete a dashboard template:

1. Select **Template** | **Dashboard Templates**.
2. Make sure the **Template** radio button 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.

User Requirement: Info Manager Administration Rights

Managing User Dashboards

To view and administer user dashboards:

1. Select **Template** | **Dashboard Templates**.
2. Make sure the **User** radio button is selected. A list of all user dashboards is displayed, grouped by user.
3. Highlight the dashboard you want to view, modify, or delete.
4. Select the action to carry out on the user dashboard. For example, select **Modify Details** to change the category that the dashboard is stored under.
5. Click **Save**.

This feature can be useful if a user has added content to their dashboard which is preventing them from logging on to CRM.The System Administrator can delete the user dashboard (without opening it), so that the user can regain access to CRM.

User Requirement: Info Manager Administration Rights

Adding a Template Gadget

To add a new template:

1. Select **Template** | **Gadget Templates** | **New**.
2. Select the type of gadget you want to add. Please refer to the Gadget Quick Reference (page 20-7) for more information.
3. Complete the gadget wizard steps. The new gadget is displayed in the gadget templates list and is available for selection by users.

User Requirement: Info Manager Administration Rights

Modifying a Gadget Template

To modify a gadget template:

1. Select **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 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.

User Requirement: Info Manager Administration Rights

Deleting a Gadget Template

To delete a gadget template:

1. Select **Template** | **Gadget Templates**.
2. Highlight the gadget you want to delete.
3. Click **Delete Gadget**. A warning message is displayed informing you that this action cannot be undone.
4. 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.

User Requirement: Info Manager Administration Rights

Setting up an Interactive Company Dashboard

Sage CRM is delivered with 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. Please refer to What is the Interactive Dashboard? (page 20-2) for an overview of the Interactive Dashboard. Company Dashboards are only available from the Dashboard tab within the Company context.

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 a Company dashboard is selected, the same dashboard is displayed to you in the Dashboard tab of all companies, until you change it.

To set up a new company dashboard:

1. Make sure you are in the context of a company, and click on the **Dashboard** tab.
2. Make sure you are in the Interactive (and not Classic) Dashboard. Switch to the Interactive Dashboard by clicking the **Interactive Dashboard** hyperlink if you need to.
3. Select **New Dashboard** | **Create Dashboard** and add the gadgets you want. Please refer to Gadget Quick Reference (page 20-7) for more information.
4. Set as your default dashboard by selecting **Dashboard Options** from the dashboard drop-down.

Changes to the Company Dashboard do not affect the Dashboards available from My CRM | Dashboard. Company Dashboard templates are only available from the Company Dashboard tab.

Chapter 21: Classic Dashboard

In this chapter you will learn how to:

- **Understand what to use the classic dashboard for**.
- **Set up a new classic dashboard**.
- **Change content directly on the dashboard page**.
- **Edit classic dashboard details**.
- **Modify classic dashboard content**.
- **Add saved searches to a classic dashboard**.
- **Add favorite reports to a classic dashboard**.
- **Add report charts to a classic dashboard**.
- **Set up a company dashboard**.
- **Modify the content of the company dashboard**.

What is the Classic Dashboard?

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

You can create a new dashboard with all the content you need for your day-to-day work.

To create a new dashboard:

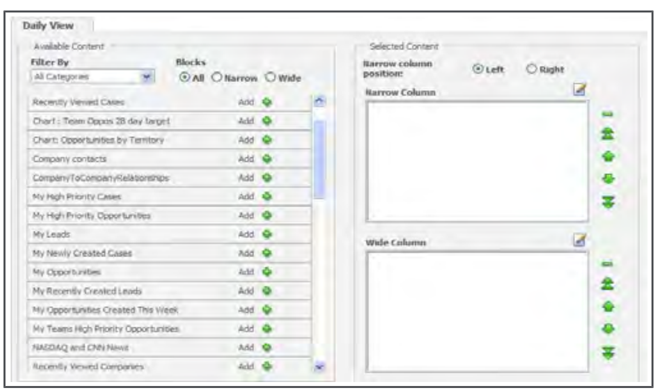
1. Select **My CRM** | **Dashboard**.
   - If the System Administrator has not set up a standard dashboard, then the **Dashboard Details** page is displayed.

- 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 on the **New Dashboard** button 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 on the **New Dashboard** button to create a new dashboard.
- If you are viewing an Interactive Dashboard, select the **Classic Dashboard** link, 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 the **Set As Default**check box to make this the default dashboard. The **Set As Mobile Dashboard** check box makes the dashboard available on mobile devices.

Dashboard Details page

4. Click on the **Continue** button. The Dashboard Content page is displayed.
   The Dashboard Content page is divided into the **Available Content** panel and the **Selected Content** panel.
   - Use the **Add** button 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.



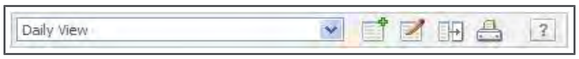
Dashboard Content page

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 on 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 on 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 on 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.
- Use the **Clear** button to clear all the selected content in the Narrow or Wide content list.

6. Click on the **Save** button. 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

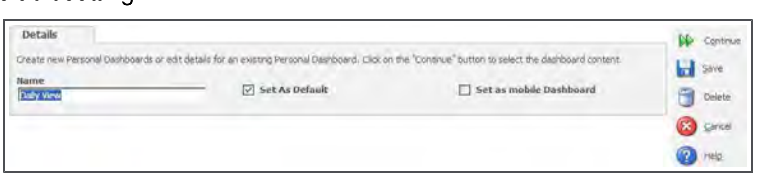
   - You can use the Dashboard toolbar to set up another dashboard, modify the existing dashboard, and switch between existing dashboards. You can use the **Print** button to print your dashboard.
   - **Note**: You can set the Dashboard page to be the first page you see when you logon to CRM by selecting Dashboard from the Log Me Into field on the My CRM | Preferences tab.

Changing Content Directly from the Classic Dashboard Page

- You can minimize, restore, or remove dashboard content by clicking on 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 on 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 the Preferences tab, then a **View All** hyperlink is displayed in the bottom right-hand corner of the panel. Click on this hyperlink 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 the Preferences tab, then a **View Calendar** hyperlink is displayed. The hyperlink takes you to the Calendar tab.

Editing Classic Dashboard Details

- Click on the **Edit Dashboard Details** button to change the dashboard name, or to change the default setting.



Dashboard Details page

- The **Save** button returns you to the Dashboard page. The **Continue** button displays the Dashboard Content page.
- If the dashboard you are editing is a standard dashboard, which you have modified, a **Reset Standard Dashboard** button is displayed on the Edit Dashboard Details page. Selecting this button restores the content of the standard dashboard.
- **Note**: Changes made to Standard Dashboards do not affect the standard dashboards of other users. When you modify a standard dashboard, you are effectively making your own personal version of the standard dashboard.
- You can also delete a dashboard from the Dashboard Details page, by clicking on the **Delete** button.

Note: 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

To modify the content of an existing dashboard:

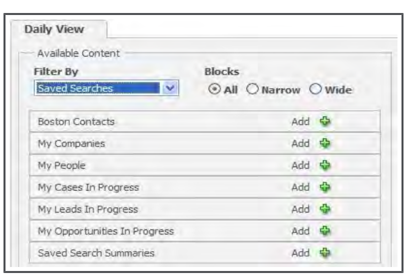
1. Select **My CRM** | **Dashboard**.
2. Select the dashboard you want to modify from the drop-down list at the top of the page.
3. Click on the **Modify Dashboard** icon. The Dashboard Content page is displayed.
4. Modify the content.
5. Select the **Save** button. The modified dashboard is displayed.

Adding Saved Searches to a Classic Dashboard

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. Select **My CRM** | **Dashboard**, and click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
3. Select the **Saved Search** category from the Filter By drop-down list. The saved search you created is displayed in the list of Available Content.



List of Available Content

4. Click on 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. Select the **Save** button. The dashboard page is displayed, showing the Saved Search list you created.

Adding Favorite Reports to a Classic Dashboard

All users with access to the Reports menu button, 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. Select **My CRM** | **Dashboard**, and click on the **Modify Dashboard** button.
3. The Dashboard Content page is displayed.
4. Select the **Other** category from the Filter By drop-down list.
5. Click on the **Add** button next to the Favorite Reports content item.
6. Select the **Save** button. The dashboard page is displayed. The Favorite Reports content panel is displayed on the dashboard with all of your favorite reports.
7. Click on the **hyperlink** of 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 select the **Go** button. The report output is displayed in a new browser window.

Adding Report Charts to a Classic Dashboard

Users with Information Manager security rights can create new reports and modify existing reports. If the Available On Dashboard check box is selected in the Chart Options panel of the Report Options, Step 2 of 2 page, then the chart is displayed for selection by the user in the Report Charts category on the Dashboard Content page.

To add a report chart to 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** check box on the Chart Options panel, and complete the other Chart Options fields. **Note**: The Available On Classic/Interactive Dashboard check box is not available on the Chart Options panel of Historical reports.

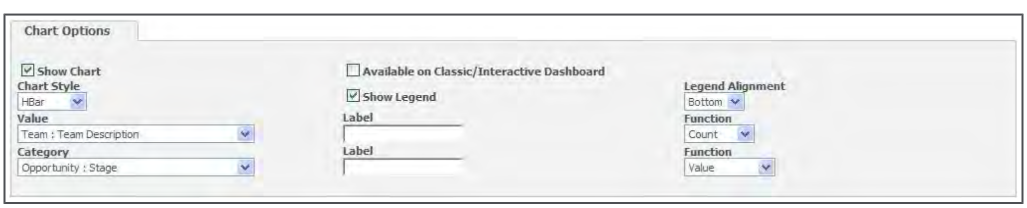


Chart Options panel

3. Select the **Save** button.
4. Select **My CRM** | **Dashboard**, and click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
5. Select the **Report Charts** category from the Filter By drop-down list.
6. Click on the **Add** button next to the Report chart you added. **Note**: 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. Select the **Save** button. The dashboard page is displayed. The report chart is displayed on the dashboard. You can click on the **View Full Report In New Window** icon to view more of the report. This icon is not available on "standalone" chart content panels. These can be identified in the content lists by the prefix "Chart".

Report Chart on Dashboard page

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, please refer to Running a Report (page 10-1).

User Requirement: Info Manager Administration Rights

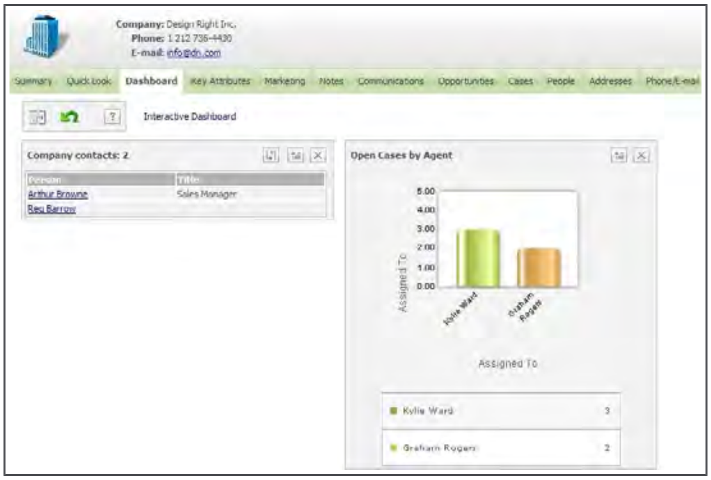
Setting up a Classic Company Dashboard

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.

To set up a company dashboard:

1. Within the context of a company, select the **Dashboard** tab.
   - If the System Administrator has not set up a standard company dashboard, then 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 on the **Modify Dashboard** button to review the existing content.

2. In the Available Content panel, click on the Add button beside the content panels you want to add to the dashboard. The selected content is listed in the Selected Content list.
3. Click on the **Save** button. The Company Dashboard is displayed.



Company Dashboard

Select the **Reset Standard Dashboard** button to revert to the Standard Company Dashboard, set up by the System Administrator.

Modifying the Content of the Company Dashboard

To modify the content of a company dashboard:

1. Within the context of a company, select the **Dashboard** tab. The Dashboard page is displayed
2. Click on the **Modify Dashboard** button. The Dashboard Content page is displayed.
3. Make the changes you require.
4. Click on the **Save** button. The Company Dashboard page is displayed with the changes you made.

Chapter 22: Preferences

In this chapter you will learn how to:

- Open the Preferences work area.
- Know which preferences I can change.
- Change Preferences.

Accessing Preferences

User Preferences give you more control over the way information is displayed. You can tailor the display of information to better suit the way you work. For example, if you work in the customer service team, your main interest is probably the status of existing cases. Using the Log Me In To option, you can set Preferences to show the cases you are working on as the first page you see when you log on.

To access Preferences:

1. Select the **My CRM** button.
2. Click on the **Preferences** tab.

Preferences page

3. Select the **Change** button.
4. Enter the details in the **Preferences** page.
5. Select the **Save** button. The Preferences page is displayed. Log off and back on again to see the changes take affect.

Note: The Install CRM Outlook Integration / Install CRM Outlook Exchange Integration, and Change Password action buttons are available on the Preferences page. Please refer to Downloading the Outlook Plug-in for Classic Outlook Integration (page 8-1), Installing the Outlook Plug-in for Exchange Integration (page 7-10), and Changing Your Password (page 2-2) for more details.

Preference Fields

The table below describes the standard fields.

Field	Description
Log Me In To	Determines the default first page when you log on. For example, Dashboard, Calendar, Case List, or Opportunity List.
Empty Recent List For Each Session	The Recent List "remembers" the most recent pages you have visited in CRM. Selecting Yes empties the Recent List each time you log off and back on again.
Recent List Activation By	Options available are Click and Hover, as the Recent List can be viewed by clicking on or hovering over the Recent button. Please refer to Appointments and Tasks (page 5-1) for more information.
Pop Out List Activation By	Select from Hover or Click. You can hover or right-click on the menu buttons to activate the Pop Out lists.
My Default Find Screen	Determines 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	Makes the Solutions tab available in the My CRM work area. The System Administrator must give you rights to view Solutions for this option to appear.
Show Outbound Calls In My CRM	Makes the Outbound Calls tab available in the My CRM work area.
Currency	Currency in which monetary fields are displayed to the user. Implementation dependent.
Show Leads Pipeline	Displays the graphical pipeline of leads in the Leads tab within My CRM and Team CRM.
Show Opportunities Pipeline	Displays the graphical pipeline of opportunities in the Opportunities tab within My CRM and Team CRM.
Show Cases Pipeline	Displays the graphical pipeline of cases in the Cases tab within My CRM and Team CRM.

Field	Description
Grid Size	Determines the default maximum length of lists and grids on a page.
E-mail Screen Position	The way in which the New E-mail screen is displayed. Select from Normal, Popup, or Split. Note, the Normal and Split options are ignored if you are working with CRM in Outlook. In other words, a new e-mail will always be displayed in a popup window.
Line Item Screen Position	The way in which the Line Item screen is displayed. Select from Popup or Split.
Report Print Preview Default Page size	The default page size used on the Report Display Options page for producing a report in PDF format.
Report Print Preview Default Orientation	The default orientation (Portrait or Landscape) used on the Report Display Options page for producing a report in PDF format.
On-screen Coaching	Determines how on-screen coaching is displayed. **On**. Turns coaching on for all screens for which coaching is available. **Off**. Turns all coaching off. **Minimized**. Users must click on the Maximize On-screen Coaching button at the top of an individual screen to view on-screen coaching for that screen. **Customized**. Allows users to minimize on-screen coaching on some screens while leaving it maximized on others.
Single-Column Calendar	Set to Yes, the calendar is in single column format, with vertical spacing adjusting to the content of the time slot. Set to No, the daily view can be displayed in an Outlook-style view, where there is equal spacing between vertical time slots and multiple appointments at the same time are placed next to each other in columns.
Number of Calendar Columns	The maximum number of columns when the Single-Column Calendar setting is set to No. When this number is exceeded, the calendar style reverts to a single column format.
Full Menu in Outlook	Field applies to Classic Outlook Integration only, and is not available when Exchange Server Integration in enabled.

Field	Description
	Displays or hides the menu buttons in CRM in Outlook (2007 only). Defaults to No to maximize viewing space for CRM in Outlook. The Full Menu in Outlook setting can be altered in either CRM or Outlook, and you will see the change the next time you log on to CRM via Outlook. Please refer to Using CRM from within Outlook (Classic Outlook Integration) (page 8-3) for more information.
Preferred Theme	Allows you to customize the look and feel of the CRM user interface. The alternative themes available to you are defined by your System Administrator. You need to log off and back on again to see the effect of the new theme. **Note**: System Help and Self Service are not affected by Themes.
CSV File Export Delimiter	Set the delimiter as comma, semi-colon, or tab. When you use the Export To File button on, for example, the results of a company search, the CSV export will use the delimiter you have set. This setting also impacts data uploads from CSV files. Please make sure the delimiter in the import file matches the delimiter set in Preferences.
Default Screen For Company	Sets the default tab which is displayed when you drill into a Company. Set to Summary to display the Summary tab or Interactive Dashboard to display the Dashboard tab.
Default E-mail Template	The user can set a default e-mail template. When creating a new e-mail the default e-mail template is selected automatically and all its values are copied to the new e-mail screen.
Default E-mail Address	The default From e-mail address used in the New E-mail screen. You can change your default From address if you have been given permission to send e-mails from other accounts.
Default Tablet Version	Set to Desktop Version if you want to use the desktop version of Sage CRM from a tablet device. Set to Tablet Version is you want to use the Tablet theme from a tablet device.
Calendar View	Determines the default calendar view. For example, Day, Month, Week, Year.

Field	Description
Calendar Start Time	Determines the start time of the calendar view on communications. Changing this settting also adjusts the shaded area in the meeting planner.
Calendar End Time	Determines the end time of the calendar view on communications. Changing this settting also adjusts the shaded area in the meeting planner.
My Week Starts On	Determines 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.
Time Zone	Each individual user's time zone needs to be set. This is especially important if you intend on synchronizing with Microsoft Outlook. There are 75 time zones to select from. The one you select defines what daylight settings are used, so you must be careful in selecting the correct zone. The zone you select also needs to correspond exactly to your computer setting. 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 time zone of the server is set by the System Administrator.
Decimal Point	The preferred way to view 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 that can be set is 6.
Thousand Separator	The preferred way to view the thousand separator. For example, period [.] or comma [,].
Default Targets For High Priority Reminder Messages	The way in which the reminder is sent out for a high priority Communication, if the Send Reminder Message check box was selected. Please refer to Appointments and Tasks (page 5-1) for information on the Send Reminder Message check box.

Field	Description
Default Targets For Normal Priority Reminder Messages	The way in which the reminder is sent out for a normal priority Communication, if the Send Reminder Message check box has been checked. Please refer to Appointments and Tasks (page 5-1) for information on the Send Reminder Message check box.
Default Targets For Low Priority Reminder Messages	The way in which the reminder is sent out for a low priority Communication, if the Send Reminder Message check box was checked. Please refer to Appointments and Tasks (page 5-1) for information on the Send Reminder Message check box.

Changing Preferences

To change Preferences:

1. Select the **Preferences** tab. The Preferences page is displayed.
2. Select the **Change** button.
3. Enter the new details on the **Preferences** page.
4. Select the **Save** button. The Preferences page is displayed. You can use the **Set To Defaults** button to return Preferences to the default settings.

Chapter 23: Writing Reports

In this chapter you will learn how to:

- **Understand the scope of the reporting functionality**.
- **Understand the fields and buttons when I'm creating a new report or changing an existing one**.
- **Add a new report category**.
- **Move a report to a different category**.
- **Create a list report**.
- **Add a chart to a report**.
- **Create a cross tabular report**.
- **Create a historical report**.
- **Cloning a report**.
- **Add a new report style**.
- **Delete a report**.

Introduction to Writing Reports

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

- An extensive list of Report Sources, which can be further expanded by using the Views Customization functionality.
- Choice of List, Cross Tabular, or Historical report types.
- The ability to add a Chart to the report.
- Use of sums, averages, groups, and record counts.
- The ability to format data in the reports 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.
- Rows Per Page setting on List reports to improve the layout of the report output.
- Private reports, available only to the user who created the report.

User Requirement: Info Manager Administration Rights

Creating a New Report Category

A user who has rights to create new reports can create new report categories.

To create a new report category:

1. Click on the **Reports** menu button. The Reports page is displayed.
2. Click on the **New Report Category** button. The New Report Category page is displayed.
3. Enter a **name** and a **description** for the new report category and select **Save**. The new report category is displayed.

The report name and description can be translated into other languages from Administration | Customization | Translations. Please refer to the *System Administrator Help* for more information on maintaining translations.

To delete a report category, change the order of the report categories, or change the graphic displayed next to the report category, you need to be a System Administrator. The changes can be made in Administration | Advanced Customization | System Menus. Please refer to the *System Administrator Help* for more information.

User Requirement: Info Manager Administration Rights

Moving a Report to a Different Category

Reports can easily be moved from one category to another.

To move a report to a different category:

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

Creating a List Report

Example: Person List

This example creates a list report, which shows People and their associated contact details.

Report columns should include:

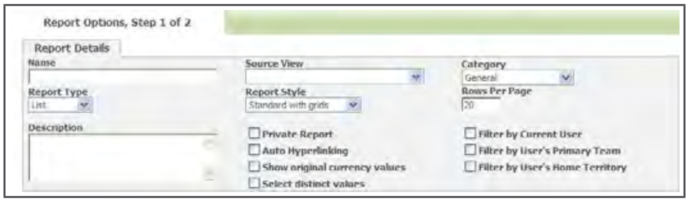
- Person : Last Name
- Person : First
- Person : Salutation
- Person : Title
- Address : City
- Person : Business E-mail
- Person : Area Code
- Person : Phone
- Company : Company Name

Further specifications include:

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

To create the report:

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

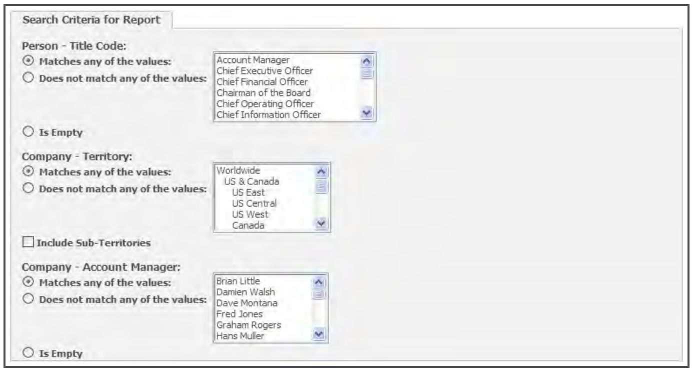


Report Options, Step 1 of 2

4. Complete the Report Details panel. When you select the **Source View**, the page is expanded to show the Select Column panel and a panel showing lists of columns for Content, Searching, Sorting, and Grouping.
5. Select the columns you want to make up the Report Contents.
6. If you want any of these columns to make up the Search or Sort criteria, or if the report should be Grouped by any of them, click on the corresponding button. Please refer to Report Fields and Buttons (page 23-4) for details on the available buttons.

Report Options for Person List report

7. Select the **Add Key Attribute Data** button. A new browser window, Add Key Attribute Data, is displayed.
8. Select the column, field, and entity to report on, then add to either the Report Contents, Search Criteria, or both.
9. Select the **Continue** button to return to the Report Options, Step 1 of 2 page.
10. Select the **Continue** button to proceed to the next stage. The Search Criteria for Report page is displayed.
11. If you want the report output to show, for example, only People where you are the Account Manager, you can specify this information on this page.



Search Criteria page

12. Select **Continue**. The Report Options, Step 2 of 2 page is displayed. The page is made up of multiple panels relating to report formatting. Please refer to Report Fields and Buttons (page 23-4) for more details.
    - Title Settings
    - Header Settings
    - Summary Settings
    - Footer Settings
    - Sort Orders
    - Column Formatting
    - Chart Options
13. Complete the information on the panels and select the **Save** button. The new report is displayed in the list of reports.
14. To run the report, select the **Run** button or click on the hyperlink of the report. The Search Criteria page is displayed.
15. Select your search criteria and click on the **Run** button to continue, or **Save** to save the selected search criteria before continuing. The report is displayed in a new browser window, showing the pagination details at the top of the page. The search criteria are displayed at the top of the report output.

User Requirement: Info Manager Administration Rights

Report Fields and Buttons

The table below explains the fields on the Report Details panel.

Field	Description
Name	The name of the report. This must be unique within all users and categories.
Source View	The name of the view that is used for this report.
Report Type	Select from List, Cross Tab, or Historical.
Report Style	Select from Standard With Grids or Standard

Field	Description
	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.
Rows Per Page	This option is displayed for List reports and applies to on-screen output only. Enter the number of rows you want to see per page. When the rows per page 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 on the next or last page buttons 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 does not 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	If checked, then only the user who created the report can see the report in the Report list.
Auto Hyperlinking	Creates hyperlinks from the content in the report columns to the record in CRM. For example, click on hyperlink of Company Name on the Report Output page, and the Summary page of the selected Company is displayed.
Show Original Currency Values	Displays the currency values entered in the system, rather than the user's preferred currency. **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 CRM | 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

Field	Description
	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.

The buttons on the Select Column panel on the Report Source page are explained below.

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 10-6) 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 3-7).

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.

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.

Fields on the report formatting panels (Title, Header, Summary, Footer, Sort Orders, and Column Formatting) are described below:

Field	Description
Title	The title to be displayed on the report. This title also forms the name of the Chart gadget on the Interactive Dashboard. If you clone a report with a chart in it, it is recommended that you update the chart title in the cloned report.
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 located in the Reports directory. There is also a file called PDFLOGO.JPG in the same location. The system uses the PDFLOGO.JPG for Adobe PDF output (usually a higher resolution image), and LOGO.JPG for on-screen output. The logos are not 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 is running the report. For more information on customizing FusionCharts, please refer to *Customizing Report Charts* in the *Themes* section of the *System Administrator Guide*.

Field	Description
Centre Content (Header)	See above.
Right Content (Header)	See above.
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.
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.

The table below explains the fields in the Chart Options panel.

Field	Description
Show Chart	Check to show a chart.
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 21-5) or Chart Gadget (page 20-8) for more information.
Chart Style	The type of chart you want to display. Available styles include Line, Bar, Horizontal Bar, Pie, Area, Point, Fast Line, Doughnut, Pyramid, and Funnel. Please refer to Chart Styles (page 23-10) 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 totalling 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 only have the Count option. Because the returned value must be numeric, non-numeric fields always have the Count option selected. Numeric fields can also specify no totalling 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.
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.

Field	Description
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.

Chart Styles

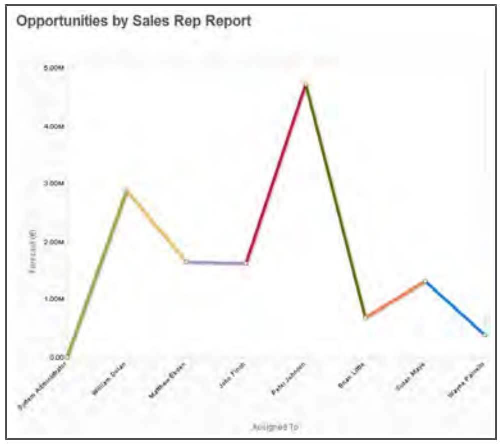
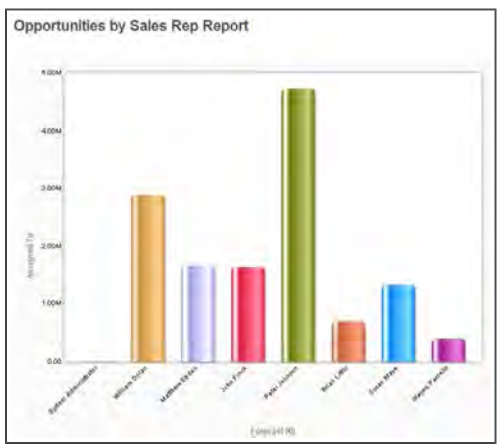
Chart Style	Example
Point, FastLine, Line	
Bar	

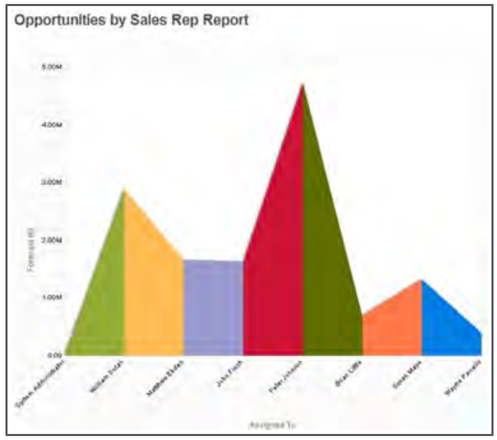
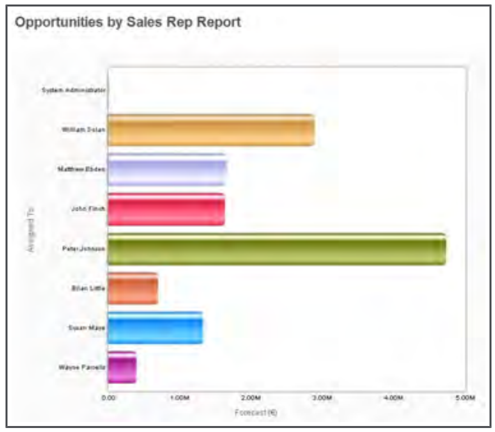
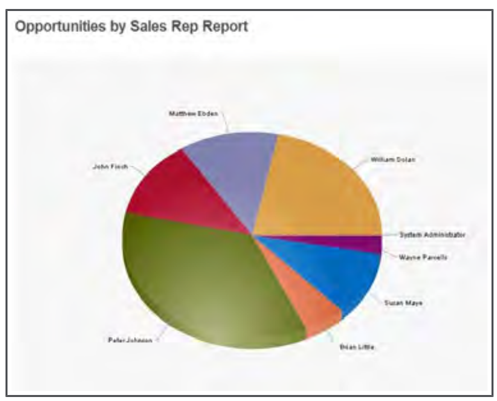
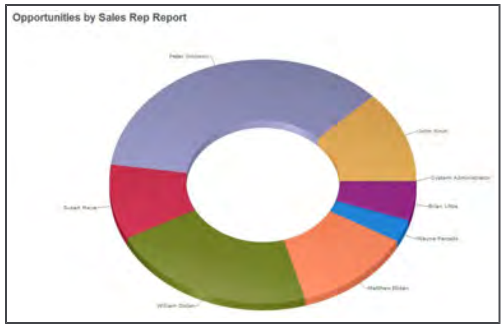
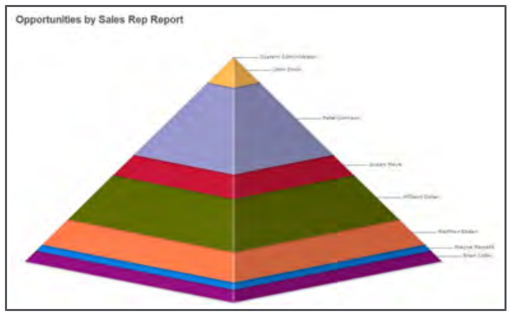
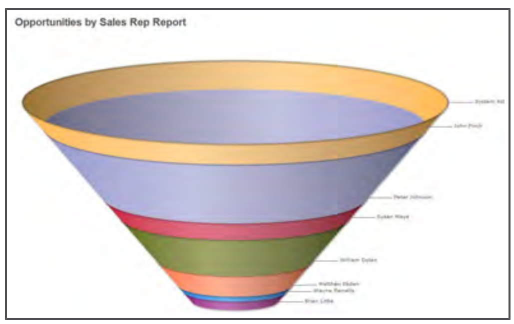
Chart Style	Example
Area	
HBar	
Pie	

Chart Style	Example
Doughnut	
Pyramid	
Funnel	

User Requirement: Info Manager Administration Rights

Adding a Chart to a Report

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. Select the **Edit** button next to the report you want to add the chart to. The Report Options, Step 1 of 2 page is displayed.
2. Select the **Continue** button. The Search Criteria for Report page is displayed.
3. Click on the **Continue** button. The Report Options, Step 2 of 2 page is displayed.
4. Scroll to the Chart Options panel of the page.

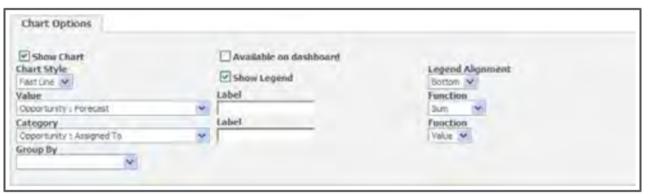
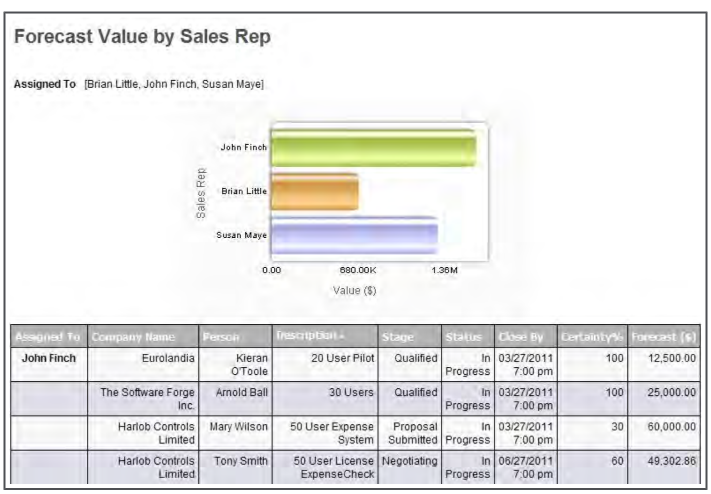


Chart Options panel

5. Complete the details in the Chart Options panel and select the **Save** button. Refer to Report Fields and Buttons (page 23-4) for information on the Chart Options fields.
6. To view the chart, run the report.



Horizontal Bar Chart report output

User Requirement: Info Manager Administration Rights

Creating a Cross Tabular Report

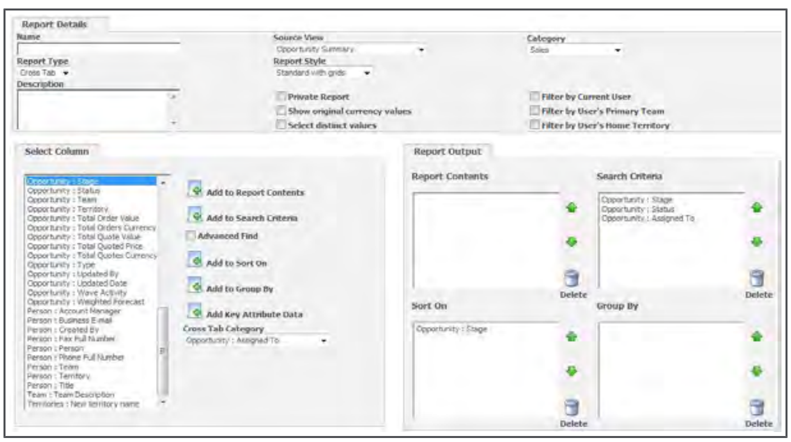
Example: Opportunity Stage by Sales Rep

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.

To create the report:

1. Select the **Reports** button.
2. Select **Sales** from the context area of the screen.
3. Click on the **New** action button. The Report Options, Step 1 of 2 page is displayed.
4. Select the Source View, and then **Cross Tab** from the Report Type field.
5. Complete the details on the rest of the page. The fields are described in the List Report example on the previous page.
6. 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.



Report Contents list

7. Select the **Continue** button and complete the information in the Report Options, Step 2 of 2 page.
8. Select the **Save** button. The new report is displayed in the list of reports.
9. To run the report, select the **Run** button. The output is displayed in a new browser window.

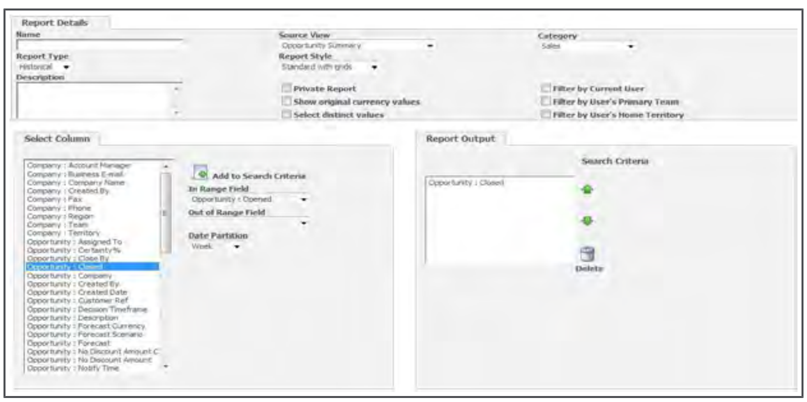
User Requirement: Info Manager Administration Rights

Creating a Historical Report

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. Select the **Reports** button.
2. Select the category to which you want to add your new report. For example, Sales. A list of Sales reports is displayed.
3. Select the **New** action button. 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 are 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 are 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.



Report Options, Step 1 of 2

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. Select the **Continue** button. 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 on the **Continue** button. 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. Select the **Save** button. The report is displayed in the list of reports.

16. Click on the hyperlink of the report or select the Run button 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 wish.
18. Select the **Run** button. 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.

User Requirement: Info Manager Administration Rights

Cloning a Report

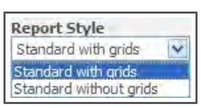
To clone a report:

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

User Requirement: Info Manager Administration Rights

Adding a new report style

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, select the **Administration** button.
7. Select **Translations** from the context area of the screen. The Find page is displayed.
8. Select the **New** button. 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. Select the **Save** button.
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.

User Requirement: Info Manager Administration Rights

Deleting a Report

To delete a report:

1. Select the **Edit** button next to the report you want to change. The Report Options, Step 1 of 2 page is displayed.
2. Select the **Delete** button. The Delete Report page is displayed.
3. Select the **Confirm Delete** button. The report is deleted and no longer appears in the report list.

User Requirement: Info Manager Administration Rights

Glossary of Terms

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.

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.

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.

CTI

Computer Telephony Integration. CRM CTI provides CTI-enabled users with telephony functionality from their desktops, via the Sage CRM interface.

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.

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.

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. It is only available when using CRM in Internet Explorer. The System Administrator can enable/disable access to the plug-in required for Document Drop for all users from the Administration area in CRM.

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.

Groups

Groups allow users to create collections of records within CRM. Groups can be static or dynamic.

Hyperlink

Hyperlinks allow you to jump from one page to another. Examples of hyperlinks are: when you click on a company name, the Summary page associated with that company is displayed in the work-area; or you can click on an e-mail address to send an e-mail straight away.

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.

Link Status

The Link Status icon is displayed in the Addresses tab. A new address added in the context of a company is linked to the company, but the Link Status shows as single-linked (plain house icon) until the address is linked to one or more contact people. Then the icon changes to multi-linked (a house with a link above it). A new address added in the context of a person is linked to the person, but the Link Status shows as single-linked until the address is linked to more than one person or to the company.

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.

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, or as e-mail or SMS messages. They can also be integrated into the workflow functionality.

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 pre-allocated to individual users, and a Communication record is only created when a successful contact is made.

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".

Quick Look

The Quick Look tab lists the most recent communications and sales opportunities linked to the company or person. Cases are listed by Status.

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.

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.

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.

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.

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.

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.

Index

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