



SageCRM

SageCRM 6.2

Quick Start Guide

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Chapter 1

Getting Started

Introduction

This guide gives you a quick start to core Sage CRM functionality – Basic skills, Sales, Marketing, Customer Service, and Administration.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac and Softline Accpac CRM.

This document does not cover CRM Options, such as CTI or back office integration with other products. These are covered in separate guides.

Basic Sage CRM

With the functionality of basic Sage CRM you can:

- Browse Customer Information
- Manage Your Time
- Track All Customer Interactions

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

For this chapter, you can log onto CRM with any of the following users:

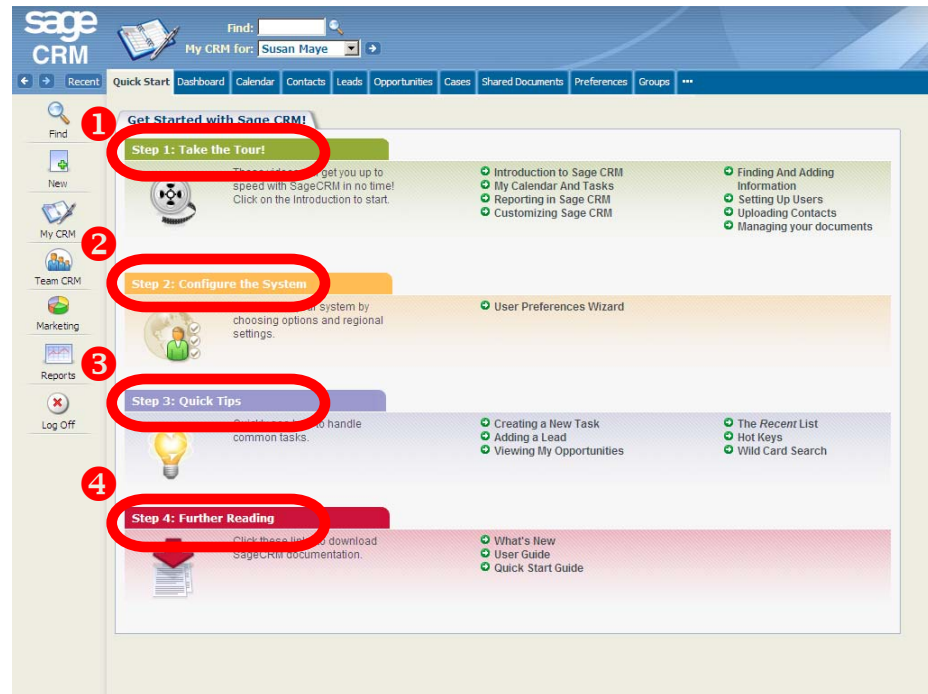
Name	User Name	Profile
Dave Montana	montanad	Marketing Manager
Susan Maye	mayes	Sales Manager
Kylie Ward	wardk	Customer Service Manager
Administrator	admin	System Administrator

None of these users require passwords.

Each of the following chapters takes you through a brief snapshot of key tasks these types of users perform.

How do I get started?

When you log on for the first time, you'll probably arrive at the Quick Start tab. This tab is part of the My CRM work area, and it contains a wide range of resources that will help you get to know Sage CRM.

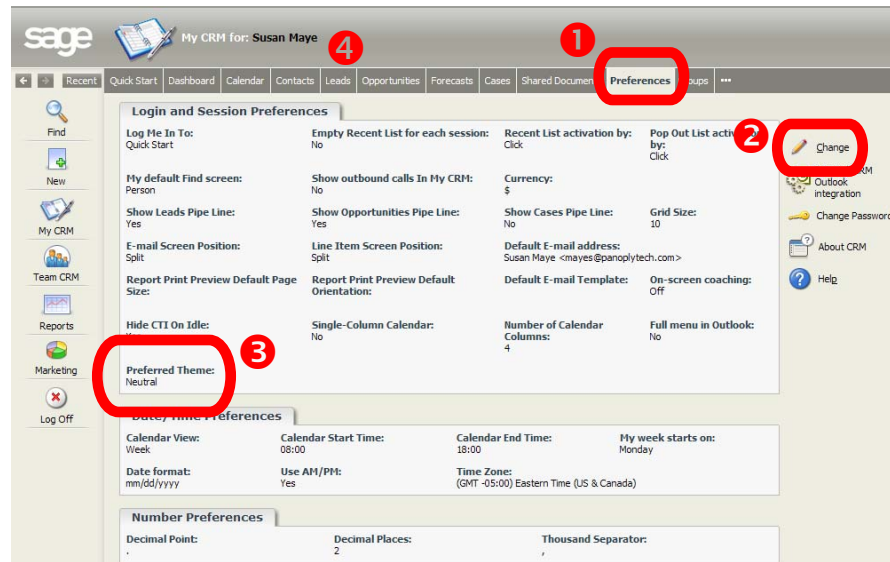


- 1 Get familiar with widely used CRM functionality by watching training videos.
- 2 Quickly configure your user preferences with the User Preferences Wizard.
- 3 Read quick tip sheets to get to grips with common CRM tasks.
- 4 Access the latest CRM documentation, including the What's New, User, and Quick Start Guides.

How do I change the look and feel of the UI?

You can change the way the Sage CRM interface is displayed by changing to one of the alternative themes supplied with the product.

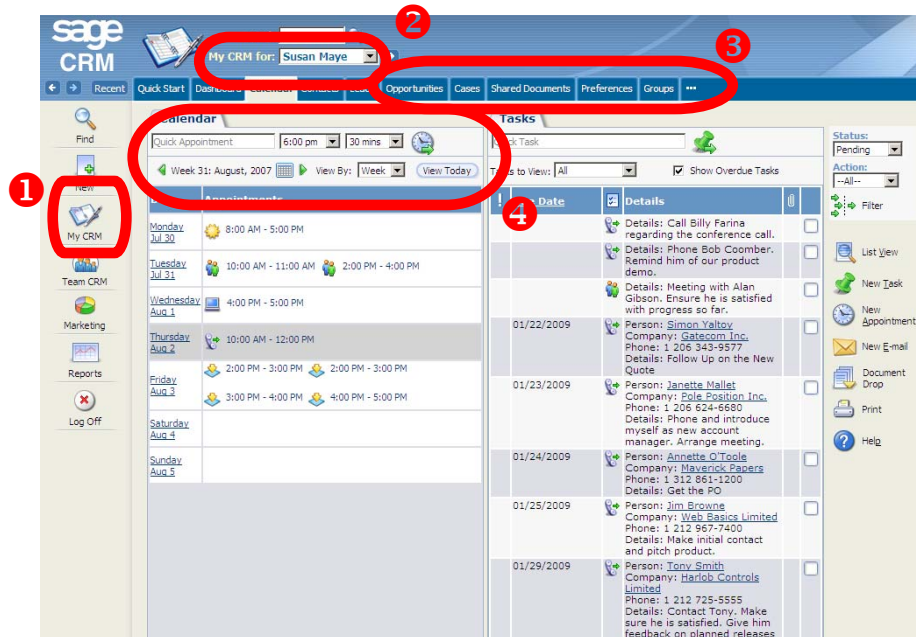
To switch themes:



- 1 Select My CRM | Preferences.
- 2 Select the Change button.
- 3 Select an alternative theme from the Preferred Theme drop-down field, and save.
Log off and log on again.
- 4 The look and feel of the alternative theme is displayed.

Where's my stuff?

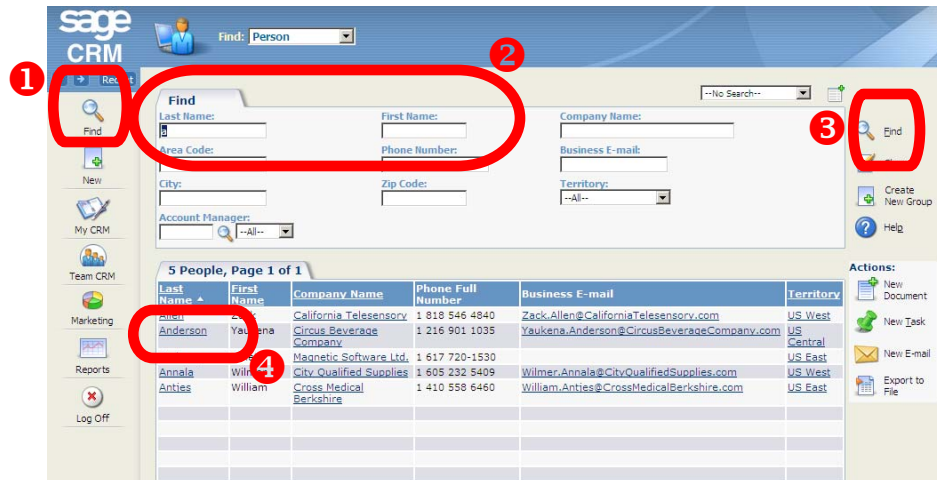
Once you've got to know CRM, you'll regularly use the other tabs in My CRM – your personal work area.



- 1 Clicking on My CRM brings you to your personal work area, no matter where you are in the system.
- 2 You can see whose work area it is from the name at the top of the screen.
- 3 Click on the different tabs to see what current appointments, opportunities, and personal settings you have.
- 4 Use the buttons at the top of the Calendar tab to get busy and start filling up your diary.

Where's the rest of the stuff?

Check out what kind of data is in your system. Go ahead, be nosy!

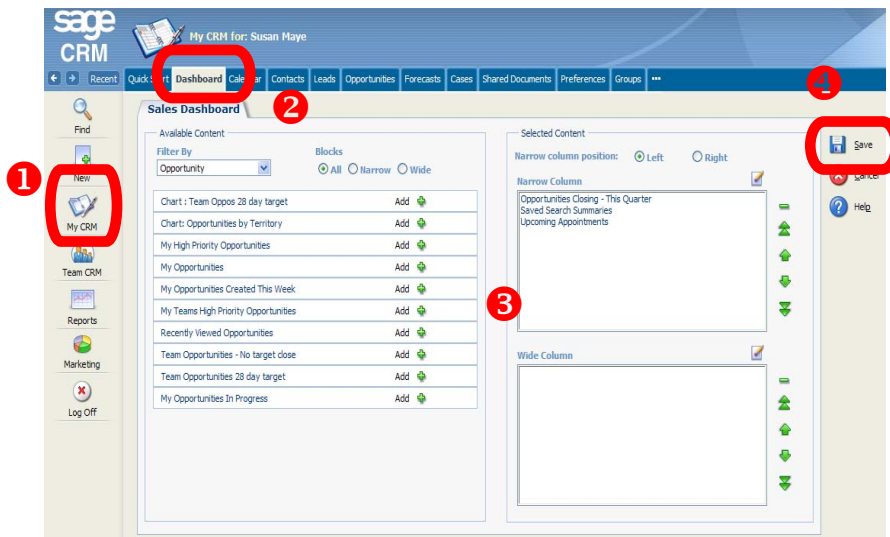


- 1 Right-click on the Find menu button, and select the type of search from the Pop Out list. For example, Person.
- 2 Type in one or more search criteria if you want to—or leave these fields blank to see all the customer information.
- 3 Click on the Find action button to start the search.
- 4 Click on any one of the hyperlinks to drill down on the customer information.

How do I use the Dashboard?

You can use a dashboard to provide a quick overview of information that is important to you. In CRM you can have as many dashboards as you like. For example, you could have a Daily Overview dashboard and a Weekly Overview. Dashboards can be custom built by an individual user, or Standard Dashboards can be created by the System Administrator.

To create a new custom dashboard:



1 Click on My CRM.

2 Select the Dashboard tab.

If you do not already have another dashboard, the Dashboard Details page is displayed. If you already have another dashboard, click on the New Dashboard button.

Enter the name of the new dashboard in the Name field. Select the Set As Default box if you wish to make this dashboard your default dashboard.

Select Continue.

3 On the Dashboard Content page, you can select dashboard content panels in the Available Content area and add them to the Selected Content area.

4 Click on the Save button.

How do I add my own real customer?

Have you got a real or imaginary business card there? Well go ahead, add it in!

The screenshot shows the Sage CRM interface for adding a new company. The form includes the following sections:

- Company:** Fields for Company Name (Browne Communications), Type, SLA, Website, Status (Active), Segment, Employees (< 20), Revenue, Source (Phone), Territory (Default), Account Manager (Susan Maye), and Mail Restriction.
- Address:** Fields for Address 1, Address 2, Address 3, Address 4, City, State, Zip Code, and Country. There are checkboxes for Business, Billing, and Shipping.
- Phone:** Fields for Business, Fax, ISDN, Modem, and Toll Free, each with Country, Area, and Number sub-fields.
- E-mail:** Fields for Info, Sales, and Support, each with an E-mail Address sub-field.
- Person:** Fields for Last Name, First Name, Middle, Suffix, Title Code, Title, Salutation, Gender, and Department. There are checkboxes for Admin, Finance, Operations, and Sales.

- 1 Right-click on the New menu button, and select Company from the Pop Out list.

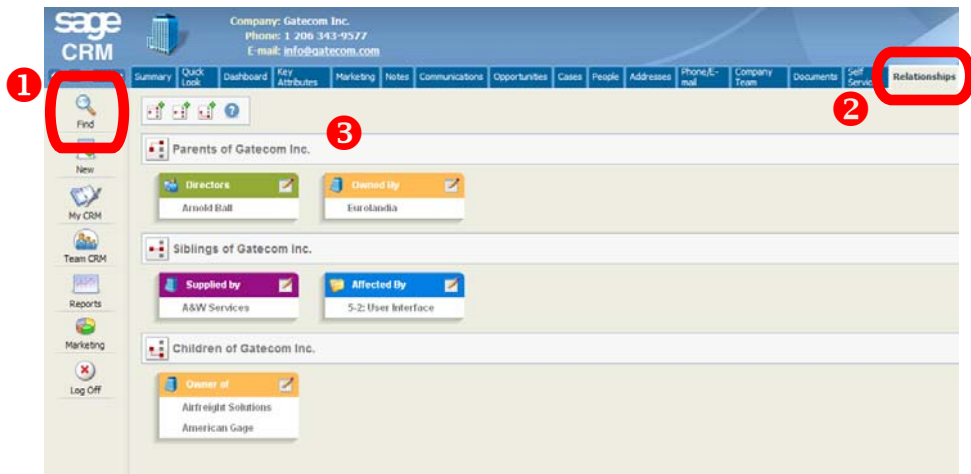
You'll go through an initial "deduplication" screen—just type in the company name and click on the Enter Company Details button to proceed.

- 2 Then go ahead and add in the company, address, and main contact details.
- 3 Click on the Save button to add all the details into CRM.

How do I keep track of customer relationships?

You can view and build relationships between all main entities, for example, Companies and Opportunities.

To view relationships:



- 1 Right-click on the Find menu button, and select Company from the Pop Out list.

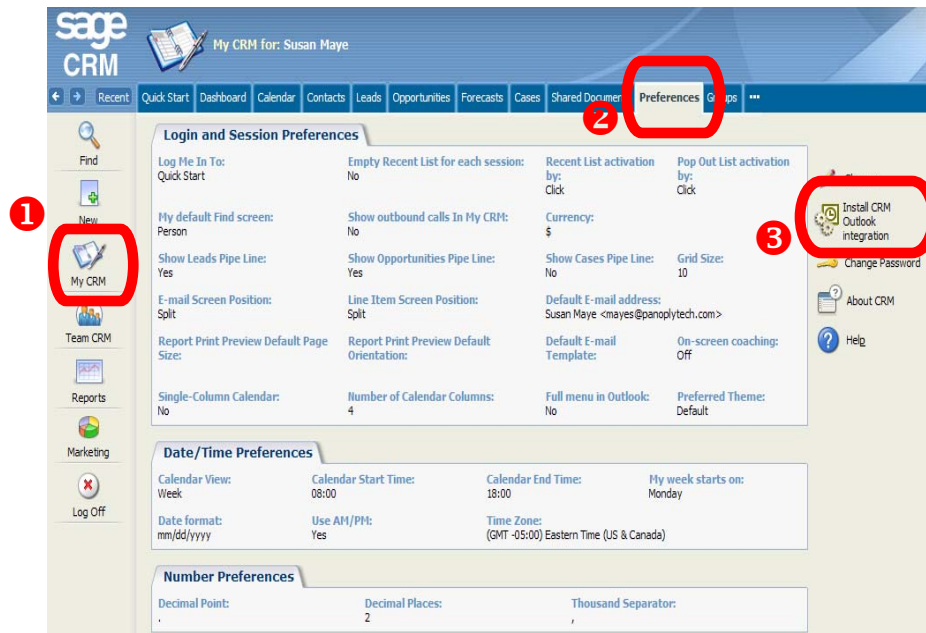
Click on the hyperlink of the company whose relationships you want to view, in this case Gatecom.

- 2 Click the Relationships tab.

- 3 You can see from Gatecom's Relationships tab, for example, that it is owned by Eurolandia, has a supplier called A&W Services, and owns the Companies Airfreight Solutions and American Gage.

How can I synchronize data with MS Outlook?

All you have to do is download the MS Outlook Plugin. Shut down Outlook before you download the Plugin from CRM.



- 1 Select My CRM.
- 2 Click on the Preferences tab.
- 3 Select the Install CRM Outlook Integration button.

Follow the on-screen instructions to install the plugin.

When you restart Outlook, you should see new CRM Synchronization buttons on the toolbar. Tasks and Appointments less than seven days old, and those with a future date specified, get synchronized automatically when you select the Sync button in Outlook. Use the Contacts tab in CRM to select contacts for synchronization with Outlook.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Marketing user.

If you are interested in going into more detail on the basic contact management areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Moving Around
- Finding Information
- Working with Lists
- Adding Customer Information
- Doing Your Work
- Working with MS Outlook
- Managing Documents
- Dashboard
- Preferences

Chapter 2

Marketing

With CRM Marketing you can:

- Set up marketing campaigns and track their costs, effectiveness, and measure leads that turned into real business
- Set up dynamic sets of prospect profiling data
- Perform e-mail blasts to your prospect database
- Import and qualify raw lead data from your Web site or purchased contact lists
- Use outbound call lists for repetitive high volume phone-based campaigns

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

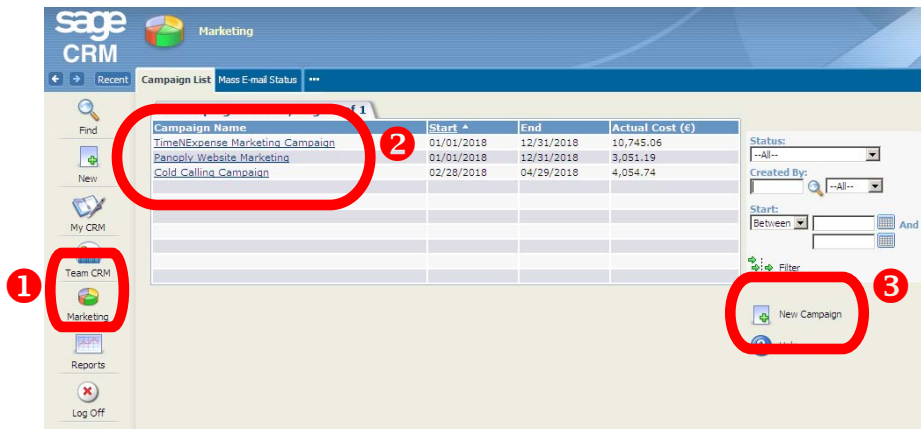
For this chapter, you can log onto CRM as:

Name	User Name	Profile
Dave Montana	montanad	Marketing Manager

This user does not require a password.

Where is the control hub of Marketing?

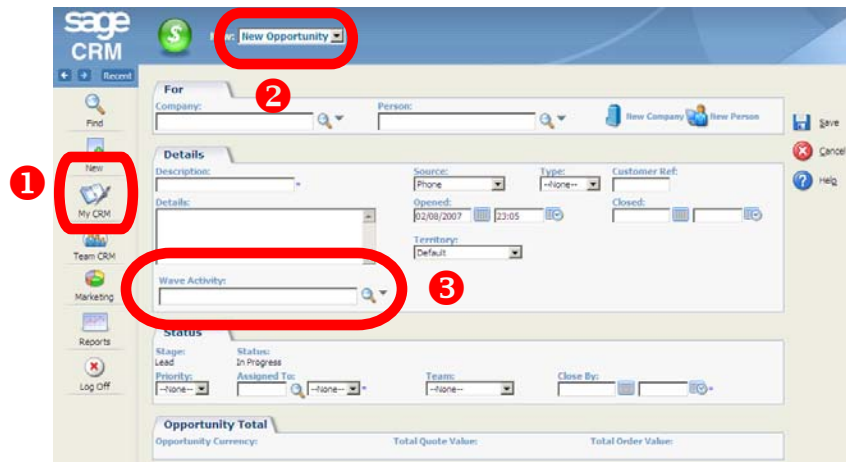
As a Marketing Manager, you will be responsible for setting up campaigns and performing database selections for those campaigns.



- 1 Click on the Marketing menu button.
- 2 The Campaign List tab shows you a list of all campaigns. They are all hyperlinked for you to drill down on the different phases or "Waves" and "Wave Activities".
- 3 You can add a new campaign, with associated Waves and Wave Activities by clicking on the New Campaign action button.

What are Wave Activities good for?

Linking wave activities to leads, sales opportunities, and general customer interactions is key to tracking the effectiveness of your marketing efforts.



- 1** Click on the My CRM button, and select the Opportunities tab.
- 2** Clicking on the New Opportunity action button on the right-hand side of the screen displays the New Opportunity page.
- 3** The Wave Activity field allows you to link a sales opportunity to a specific phase of a Marketing campaign.

The ability to link sales opportunities like this one, and also individual communications such as callbacks, and leads, to a phase or wave of a campaign persists throughout CRM. This means you can track every success or failure during the course of your campaign.

How can I measure the success of a Campaign?

Use one of the existing reports to see how you can track a campaign's effectiveness.



- 1 Click on the Reports menu button.

Select Campaigns from the list of report categories on the Reports page.

- 2 Click on the hyperlink of the report called "Campaign Results Report".

You can select your report output to be on-screen in CRM, or in PDF, MS Excel, or CSV format.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Sales user.

If you are interested in going into more detail on the Marketing areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Lead Management
- Outbound Call Handling
- Running Reports and Writing Reports
- Campaign Management
- Groups

We also recommend checking out the following chapters of the *System Administrator Guide*:

- Key Attribute Profiling

Chapter 3

Sales

With CRM Sales you can:

- Track opportunities as they move through the sales cycle
- Create Quotes and Orders and link line items to them
- Assign opportunities and tasks to colleagues for team selling
- Report and analyze sales progress, forecasts, and lists

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

For this chapter, you can log onto CRM as:

Name	User Name	Profile
Susan Maye	mayer	Sales Manager

This user does not require a password.

What's in my Pipeline?

You can view a graphical and list representation of Susan Maye's current sales pipeline.

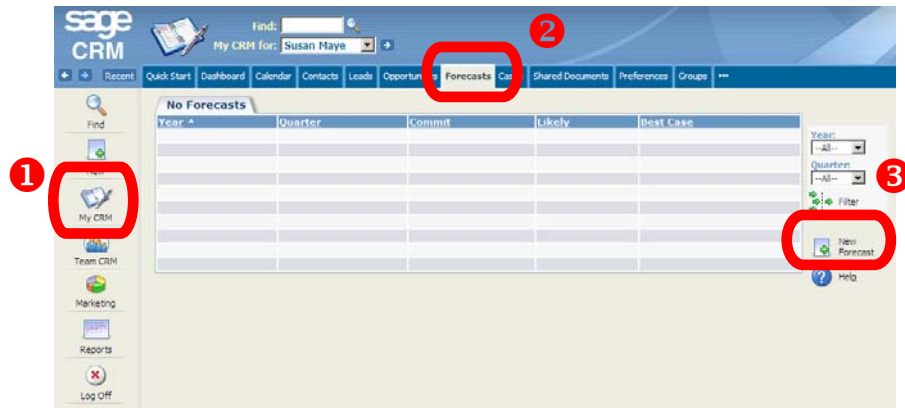
1 Select My CRM.

2 Click on the Opportunities tab.

3 Click on a segment to toggle the drill down view.

My manager needs my forecast!

You can create and submit a new sales forecast.

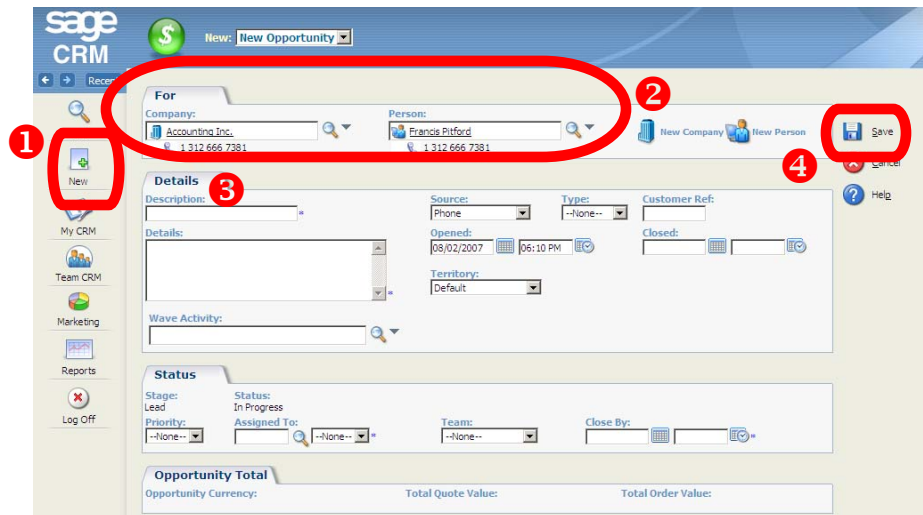


- 1 Select My CRM.
- 2 Click on the Forecasts tab.
- 3 Click on the New Forecast button.

Note: To work with forecasting, the System Administrator must give you rights to access the Forecasts tab.

How do I capture a new Sales Opportunity?

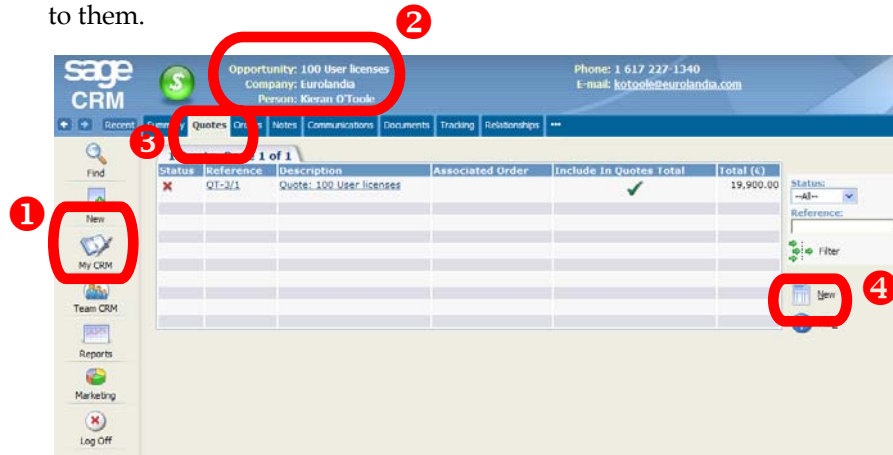
One of your existing customers, Francis Pitford from the company Accounting Inc., has a serious interest in your latest product.



- 1 Right-click on the New menu button, and select New Opportunity.
- 2 Use the search select advanced buttons to set the For panel to link to Francis Pitford at Accounting Inc.
- 3 Fill in the Opportunity details.
- 4 Click on the Save button.

How do I create a Quote and turn it into an Order?

You can generate Quotes and Orders for your Opportunities, and link line items to them.

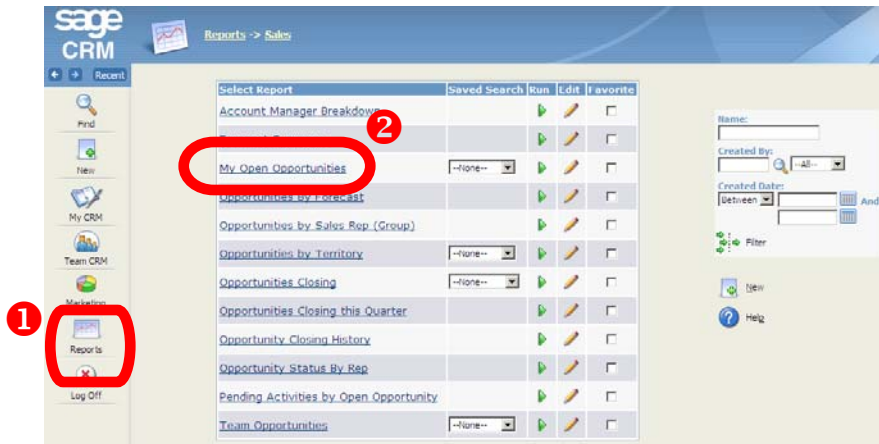


- 1 Click on the My CRM button, then select the Opportunities tab.
- 2 Click on the hyperlink of the "100 User Licenses" sales opportunity with Eurolandia.
- 3 Click on the Quotes tab.
- 4 Click on the New action button on the right-hand side of the screen to create a Quotation. You can then enter Quote summary information, add line items, and select Next.

A number of action buttons become available, giving you the options to convert the Quotation to an Order, or create a printed version of the Quotation.

How can I get an overview of my progress?

Would you like to see a report of Susan Maye's current sales opportunities?



1 Click on the Reports button.

Select Sales from the list of report categories on the Reports page.

2 Click on the hyperlink of the My Open Opportunities report.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Customer Service users.

If you are interested in going into more detail on the Sales areas touched on in this chapter, we suggest you check out the following chapters of the *CRM User Guide*:

- Lead Management
- Closing A Sale
- Sales Forecasting
- Running Reports
- Adding Customer Information

Chapter 4

Customer Service

With CRM Customer Service you can:

- Log customer service calls
- Track customer service issues as they progress through to resolution
- Monitor Service Level Agreement adherence
- Publish solutions and key word searches of a solutions database
- Escalate overdue cases

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

For this chapter, you can log onto CRM as:

Name	User Name	Profile
Kylie Ward	wardk	Customer Service Manager

This user does not require a password.

Where is my list of current Customer Service Issues?

All Kylie Ward's Customer Service Cases that she is currently working on are accessed from the My CRM work area.

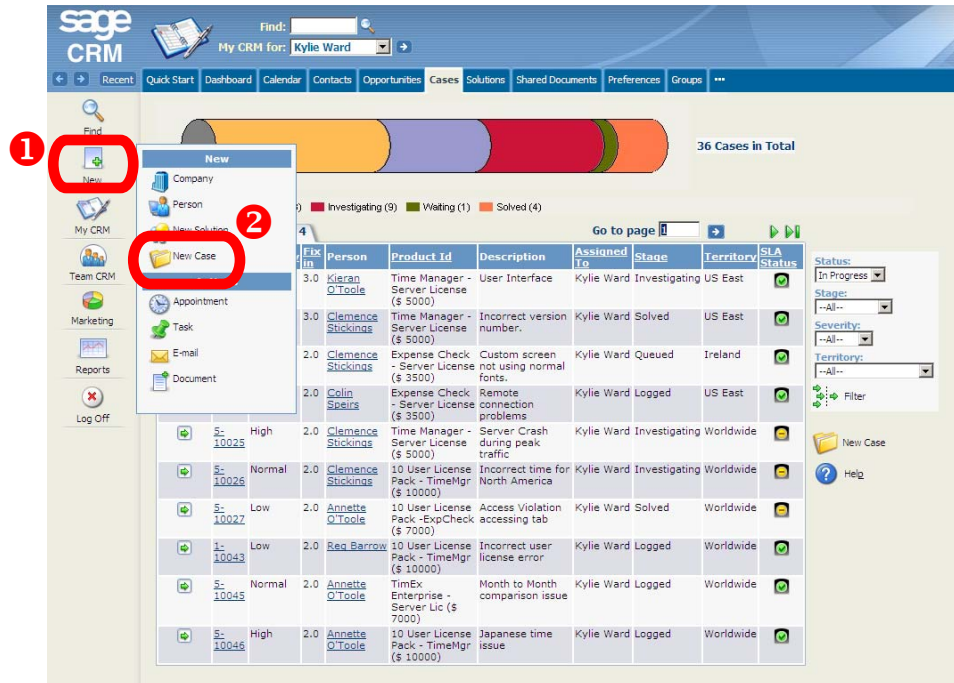
The screenshot shows the Sage CRM interface. At the top, there is a navigation bar with tabs: Quick Start, Dashboard, Calendar, Contacts, Opportunities, Cases, and Solutions. The 'Cases' tab is highlighted with a red circle labeled '2'. On the left sidebar, the 'My CRM' button is highlighted with a red circle labeled '1'. Below the navigation bar, there is a progress bar showing 36 Cases in Total, broken down by status: Logged (14), Queued (8), Investigating (9), Waiting (1), and Solved (4). Below this is a table of cases. The table has columns: Status, RefId, Severity, Effort, Person, Product Id, Description, Assigned To, Stage, Territory, and SLA Status. The 'SLA Status' column is highlighted with a red circle labeled '3'. The table contains 10 rows of case data.

Status	RefId	Severity	Effort	Person	Product Id	Description	Assigned To	Stage	Territory	SLA Status
Investigating	5-2	Normal	3.0	Kieran O'Toole	Time Manager - Server License (\$ 5000)	User Interface	Kylie Ward	Investigating	US East	On Track
Solved	5-3	Normal	3.0	Clemence Stickings	Time Manager - Server License (\$ 5000)	Incorrect version number.	Kylie Ward	Solved	US East	On Track
Queued	1-7	Normal	2.0	Clemence Stickings	Expense Check - Server License (\$ 3500)	Custom screen not using normal fonts.	Kylie Ward	Queued	Ireland	On Track
Logged	1-8	Normal	2.0	Colin Speirs	Expense Check - Server License (\$ 3500)	Remote connection problems.	Kylie Ward	Logged	US East	On Track
Investigating	5-10025	High	2.0	Clemence Stickings	Time Manager - Server License (\$ 5000)	Server Crash during peak traffic	Kylie Ward	Investigating	Worldwide	On Track
Investigating	5-10026	Normal	2.0	Clemence Stickings	10 User License Pack - TimeMgr (\$ 10000)	Incorrect time for North America	Kylie Ward	Investigating	Worldwide	On Track
Solved	5-10027	Low	2.0	Annette O'Toole	10 User License Pack - ExpCheck (\$ 7000)	Access Violation accessing tab	Kylie Ward	Solved	Worldwide	On Track
Logged	1-10043	Low	2.0	Reg Barrow	10 User License Pack - TimeMgr (\$ 10000)	Incorrect user license error	Kylie Ward	Logged	Worldwide	On Track
Logged	5-10045	Normal	2.0	Annette O'Toole	TimEx Enterprise - Server Lic (\$ 7000)	Month to Month comparison issue	Kylie Ward	Logged	Worldwide	On Track
Logged	5-10046	High	2.0	Annette O'Toole	10 User License Pack - TimeMgr (\$ 10000)	Japanese time issue	Kylie Ward	Logged	Worldwide	On Track

- 1 Select My CRM.
- 2 Click on the Cases tab.
- 3 The SLA Status column shows which cases are within, approaching, or breaching the Service Level Agreement (SLA) with the customer.

How do I log a new Customer Service Case?

Kylie doesn't have to go far to add a new case.

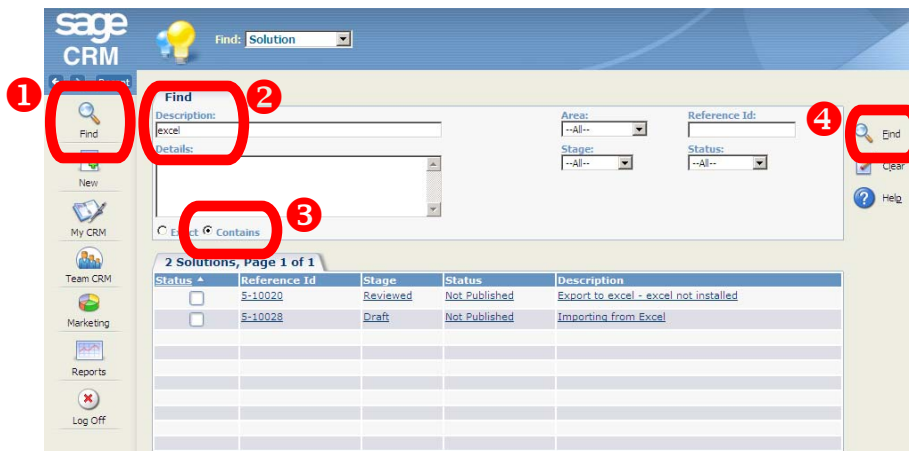


- 1 Right-click on the New menu button.
- 2 Select New Case from the Pop Out list.

Fill in the For panel on the New Case page to link the case to a customer record.

This one sounds familiar—how do I search the Knowledge Base?

If you think you might already have the answer to a Customer Service case, search your existing knowledge base of solutions first.

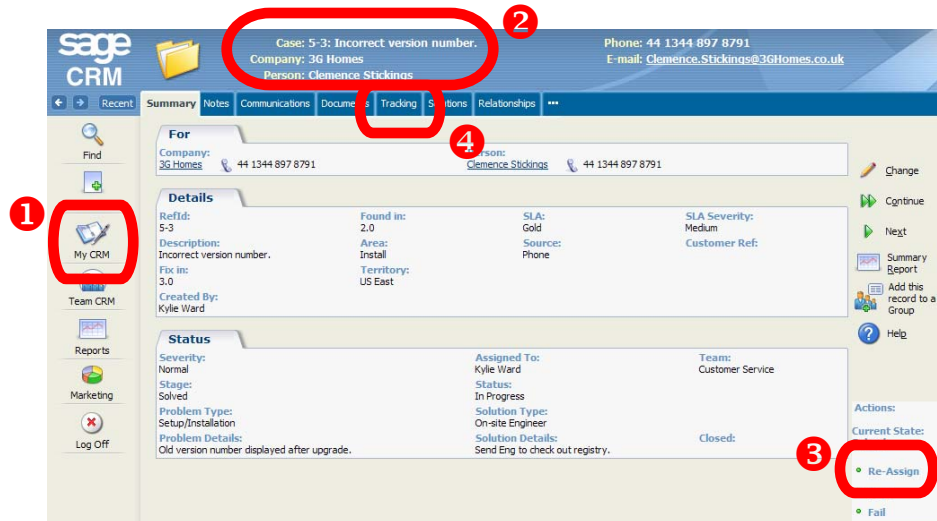


- 1 Right-click on the Find menu button, and select Solution.
- 2 Type a key word in the Description field. For example, **excel**.
- 3 Select the Contains button.
- 4 Click the Find action button.

A list of all matching Solutions in the Knowledge Base is displayed. Click on the hyperlink of the Solution for more detail.

How do I update the Status of a Case?

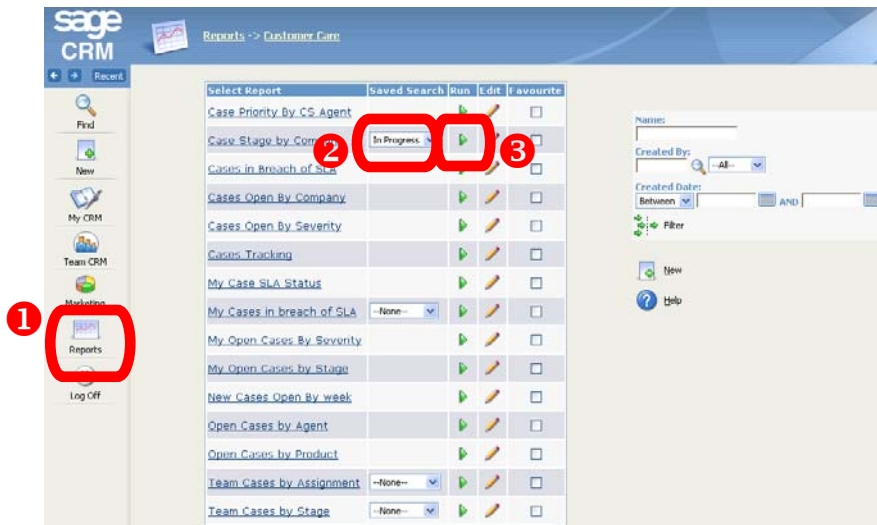
I've made progress, but I need an expert to test my resolution.



- 1 Select My CRM.
- 2 Select the Cases tab, and click on the hyperlink of any case with a stage of "Solved". The case should be displayed at the top of the screen.
- 3 Click on the Re-Assign workflow bullet to pass this case on to a colleague.
- 4 All changes made to the case can be audited from the Tracking tab.

Which customer has the most open Customer Service issues?

A simple report can give you an overview.



1 Click on the Reports menu button.

Select Customer Service from the list of report categories on the Reports page.

2 Select the In Progress saved search next to the Case Stage By Company report.

3 Click on the Run button.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Administrator users.

If you are interested in going into more detail on the Customer Service areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Providing Customer Service
- Knowledge Base
- Running Reports

Chapter 5

Administration

With CRM Administration you can:

- Customize field, screen, and list layouts
- Modify reports and document templates
- Design and update business workflow processes
- Change user setup and security access settings
- Import data from MS Excel spreadsheets
- Set up business calendars and Service Level Agreements

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

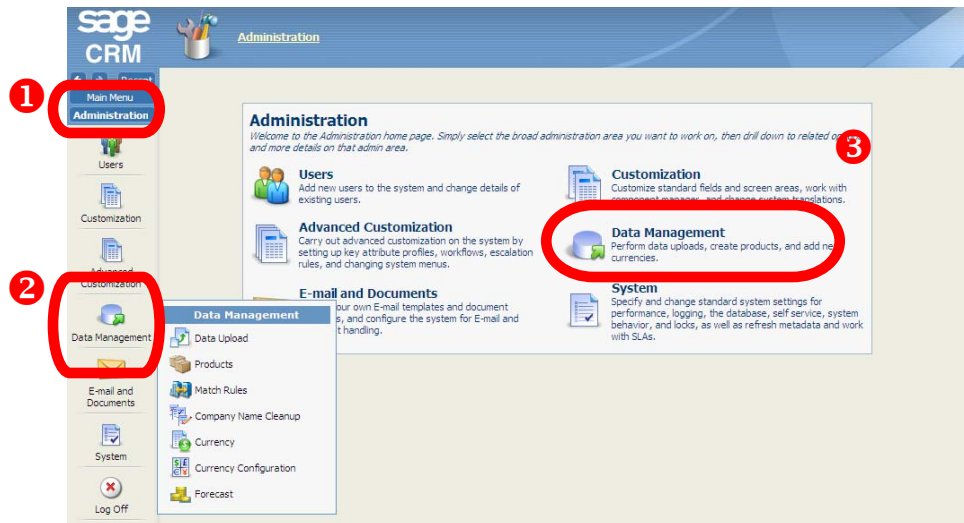
For this chapter, you can log onto CRM as:

Name	User Name	Profile
System Administrator	admin	System Administrator

This user does not require a password.

How do I access the Administration area?

The Administration button is the gateway for all system administration tasks in CRM.



- 1 Select the Administration button to access the Administration menu and display the Administration home page.
- 2 Right-click on any of the Administration menu options, and select an item from the pop out list to drill down to the administration area you want to work on.
- 3 Alternatively, select an option from the Administration home page to drill down to that option's home page. For example, selecting Data Management brings you to the Data Management home page.

How do I create a new User?

As an Administrator, you can create new users in CRM. You can create a user from a blank page, or you can create a user based on a User Template.

To create a new user:

- 1 Select Administration | Users | New User.
- 2 The New User Setup procedure can consist of up to three steps. In the first step, enter the new user's details. You can select a User Template on this page if you wish. If you would like to save just these settings, click on the Save button. They may be all you need, especially if you have based the user on a template.

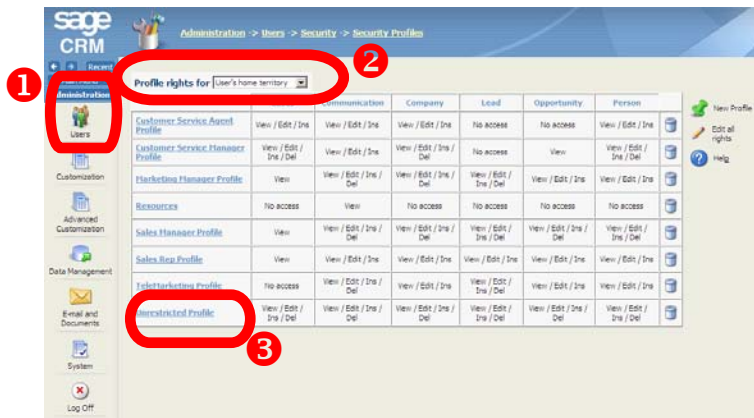
To move to the second step, click on the Continue button.

In Step 2 you can enter further user details, and enter user Security Profile Settings.

In Step 3 you can set user Login and Session Preferences, Date/Time Preferences, Number Preferences, and Reminder Preferences.

How can I edit a User's Security Profile?

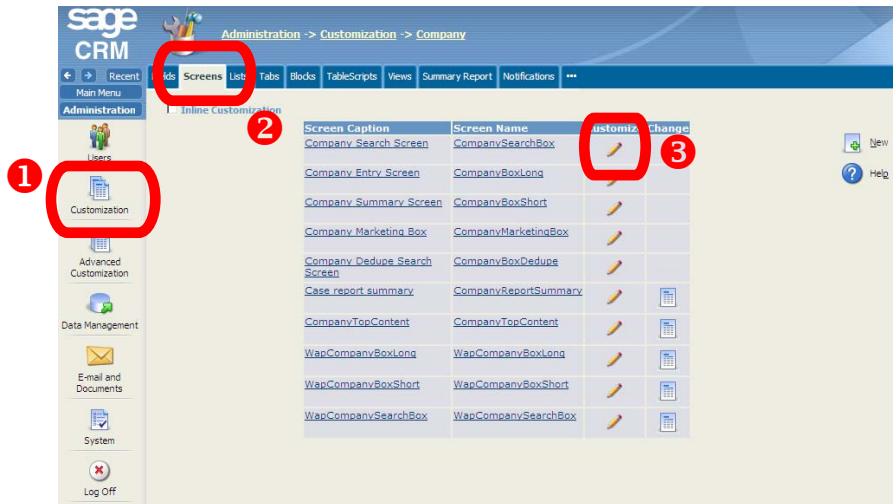
CRM allows you to set up permissions for users for accessing information stored in CRM. For example, a US user may only have access to sales information in their region.



- 1 Select Administration | Users | Security | Security Profiles.
- 2 Select User's Home Territory from the Profile Rights For drop-down list.
- 3 Select the profile you want to edit. This will show the access rights in edit mode, as well as all the users associated with this profile.

How do I change the Company Search screen layout?

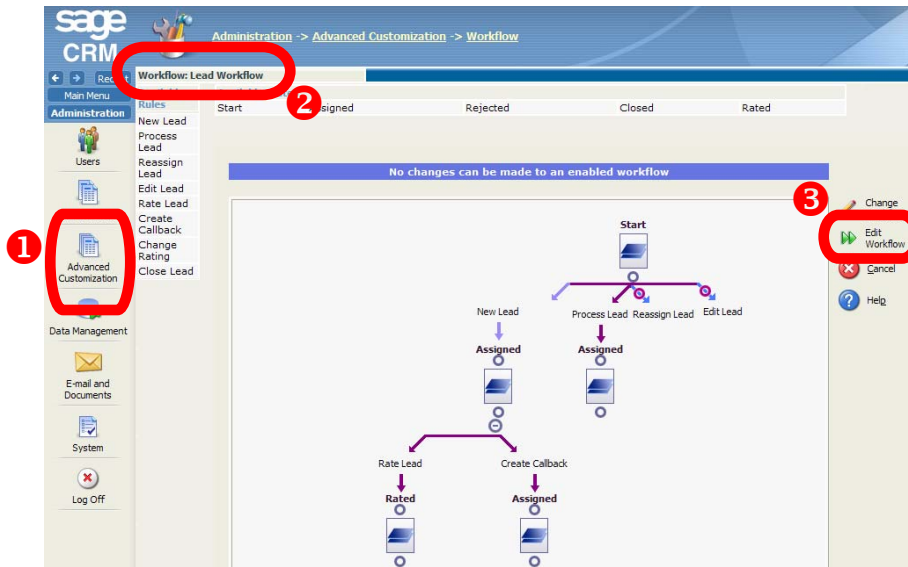
Want to switch the order of the fields on one of the screens?



- 1 Select Administration, then right-click on the Customization menu button and select Company.
- 2 Select the Screens tab.
- 3 Click on the Customize button next to the Company Search Screen.

How can I review the Lead Workflow design?

You can view, edit, and create new graphical workflows.



- 1 Select Administration, then right-click on Advanced Customization and select Workflow.
- 2 Click on the hyperlink of the Lead Workflow.
- 3 Click on the Edit Workflow button.

What can I do next?

If you are interested in going into more detail on the Administrator areas touched on in this chapter, we suggest you check out the following chapters of the *System Administrator Guide*. The chapters that most budding Administrators go for straight away are:

- User Setup
- Field Customization
- Screen Customization
- Workflow Customization
- Data Upload
- Document and Report Configuration
- Document Templates

