



## ACCELERATOR USER GUIDE

Accelerator is a third-party add-on providing an integration between Outlook and Sage CRM. You can create Companies, People, Opportunities, and Cases, as well as file emails, attachments, log call information, and tag outbound emails. Accelerator is a great tool that provides an alternative to the standard Sage CRM Outlook Plugin.

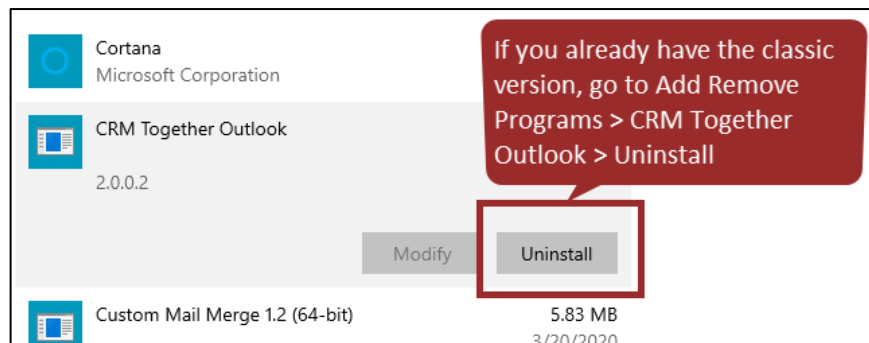
[Click here for Accelerator Training Videos](#)

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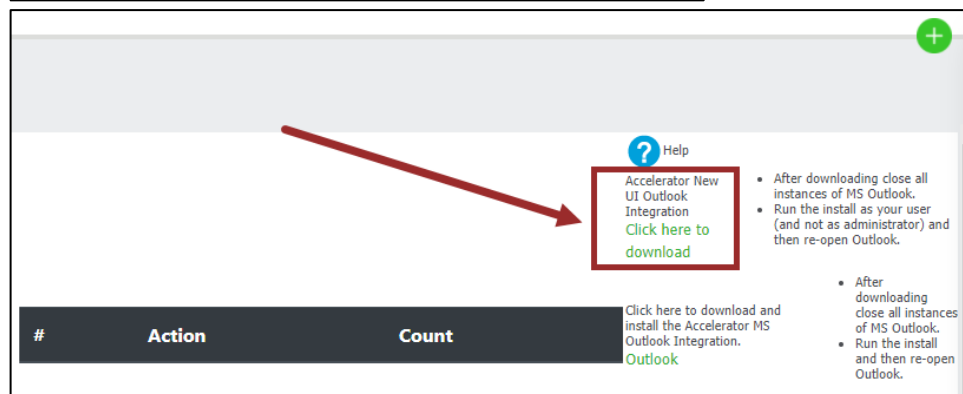
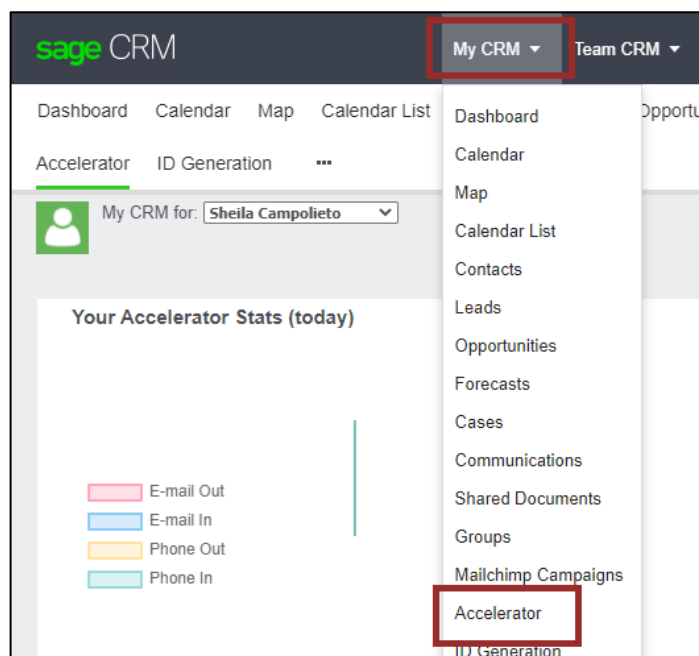
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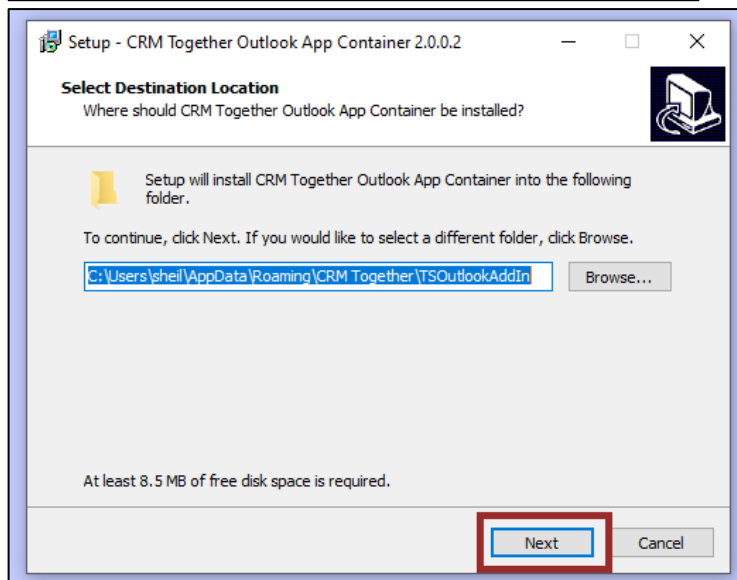
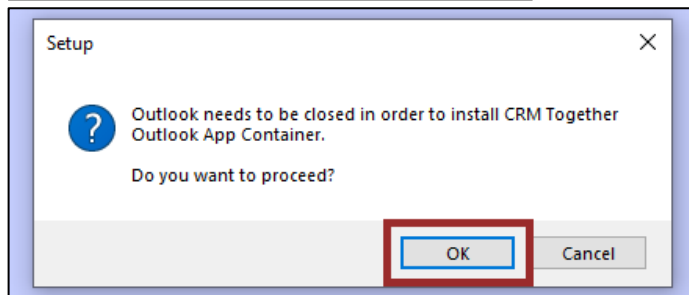
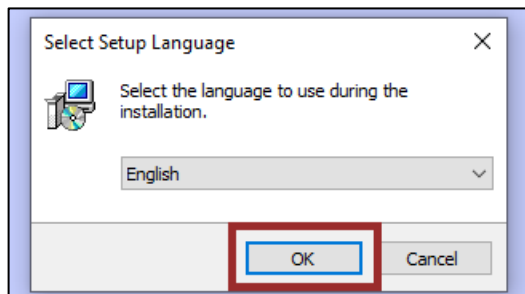
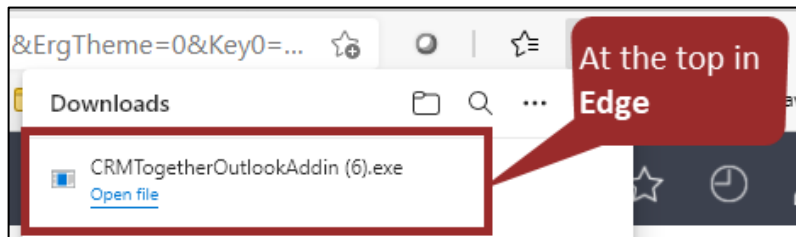
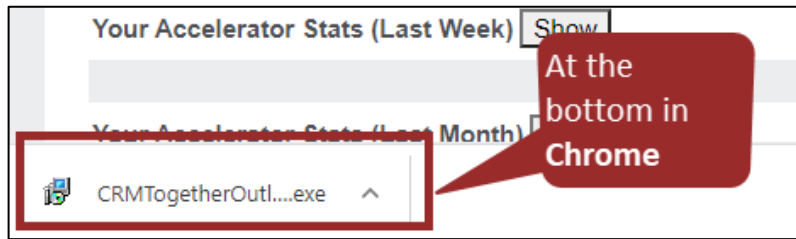
## Install Accelerator

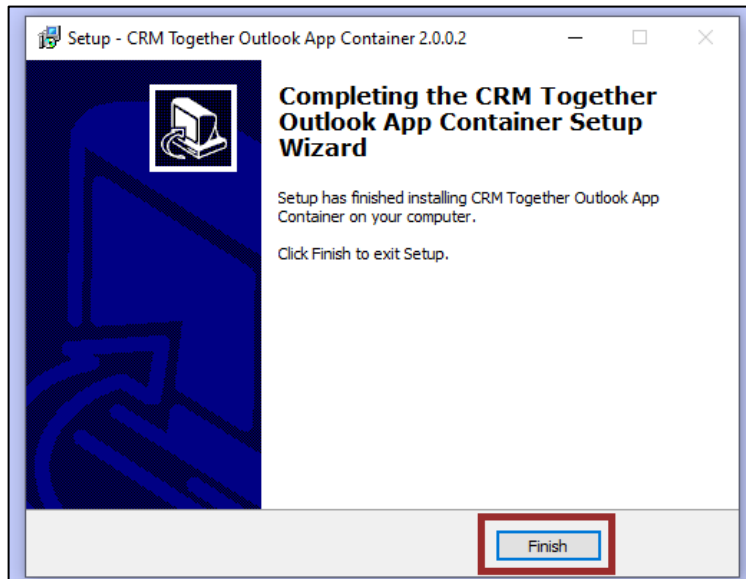
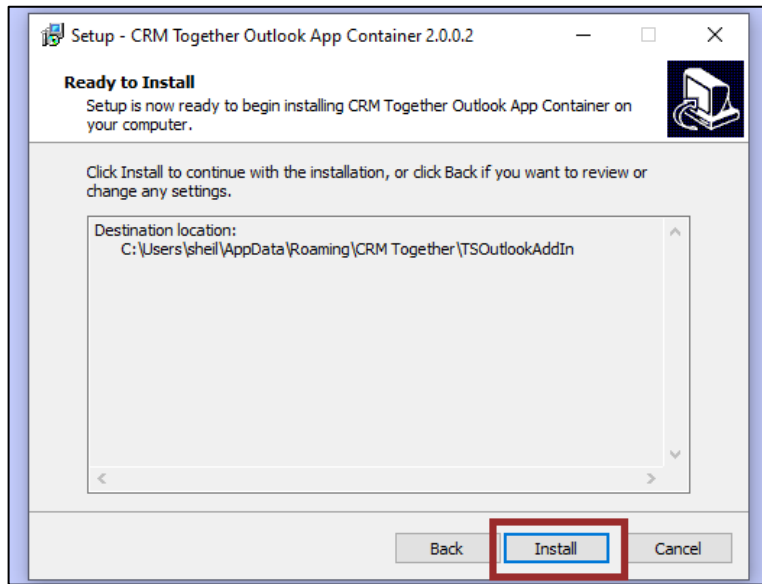
1. If you already have a version of Accelerator, first uninstall the existing version under Add or Remove Programs



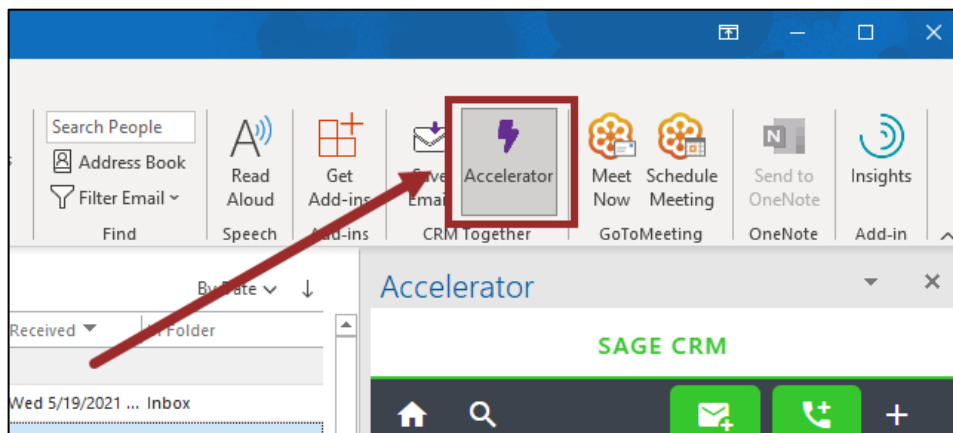
2. Close Outlook
3. Log into Sage CRM and click My CRM → Accelerator
4. Scroll down and select **Click here to download**, then follow the instructions to install the program





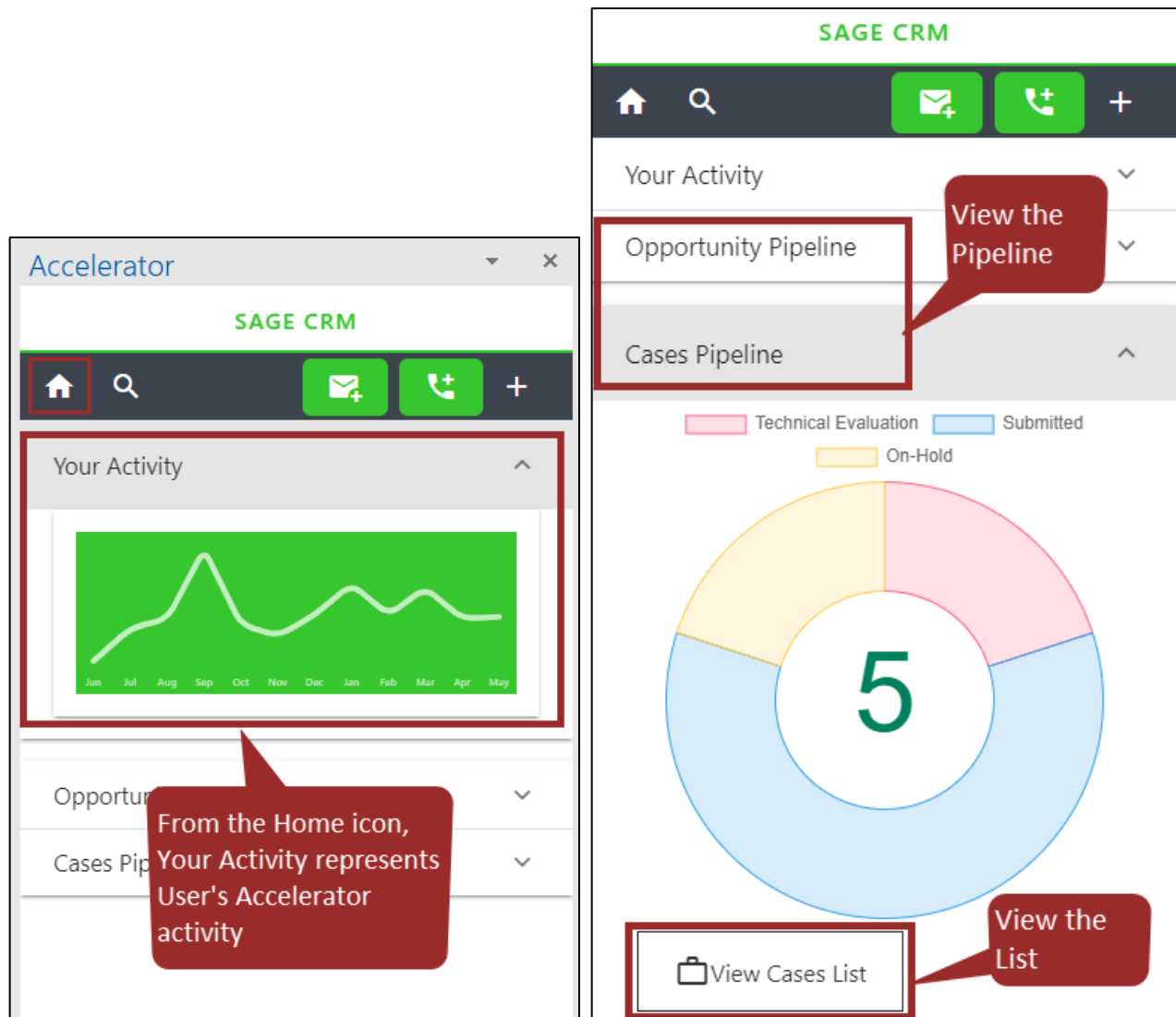


- Once the installation is finished, open Outlook and find the Accelerator icon in the top right corner of the Home tab to open the Accelerator pane (this icon also closes the Accelerator pane)

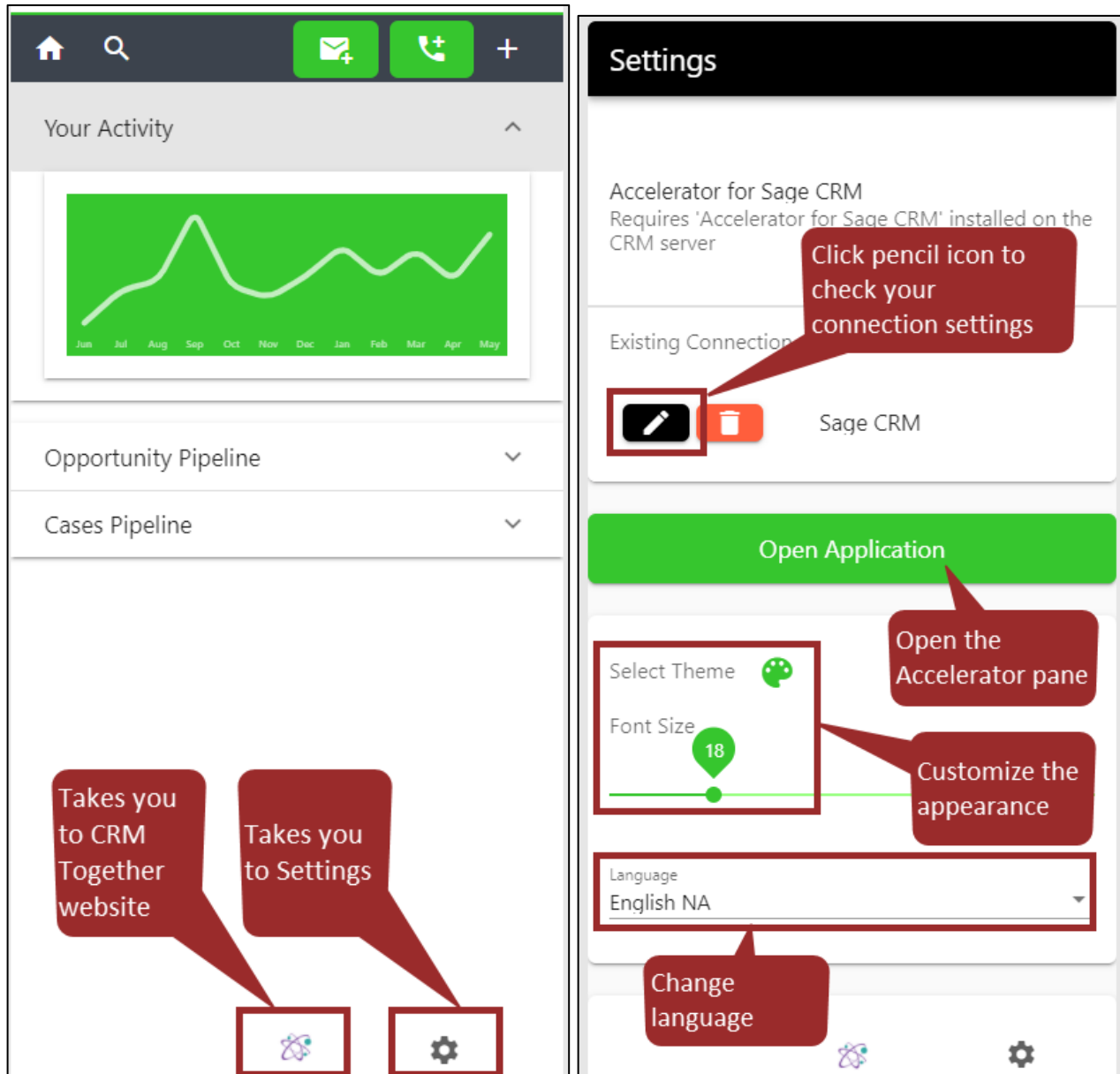


## Home Page & Settings

1. Home page gives you a quick glimpse into your Accelerator Activity, Case, and Opportunity Pipeline



2. Settings allow you to check or update your connection, change the theme, and go back to the Accelerator pane



**Accelerator for Sage CRM**  
Requires 'Accelerator for Sage CRM' installed on the CRM server

**Existing Connection**

**Open Application**

**Select Theme**

**Font Size** 18

**Language**  
English NA

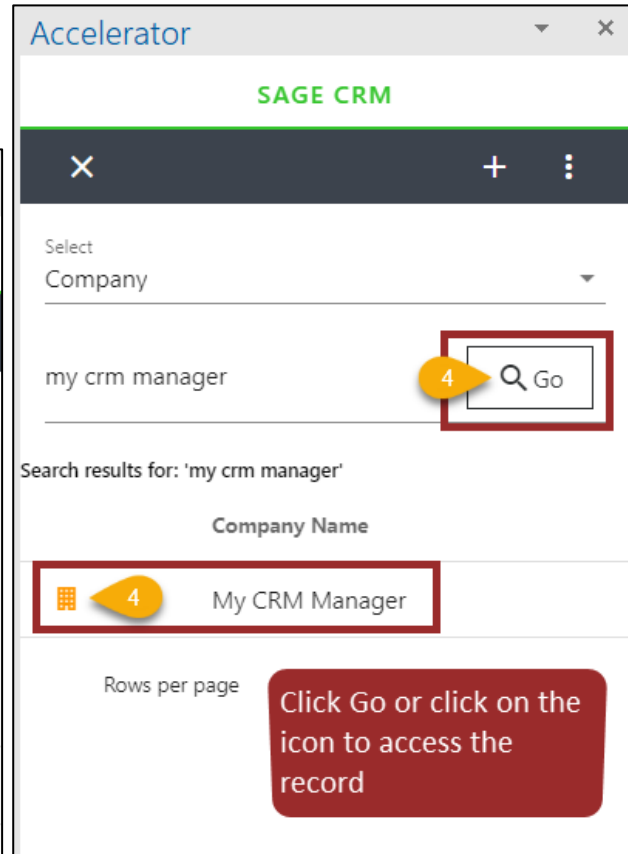
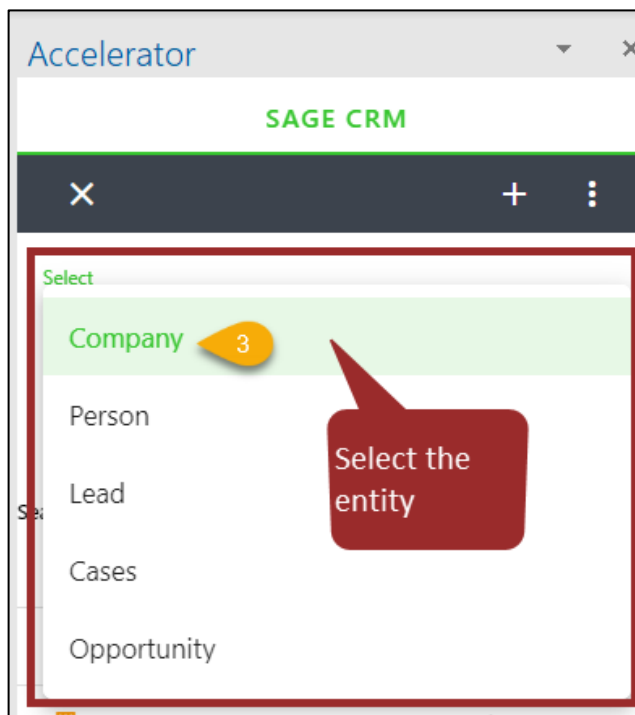
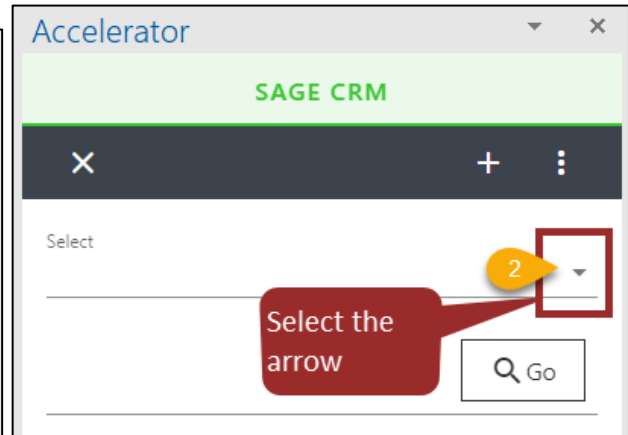
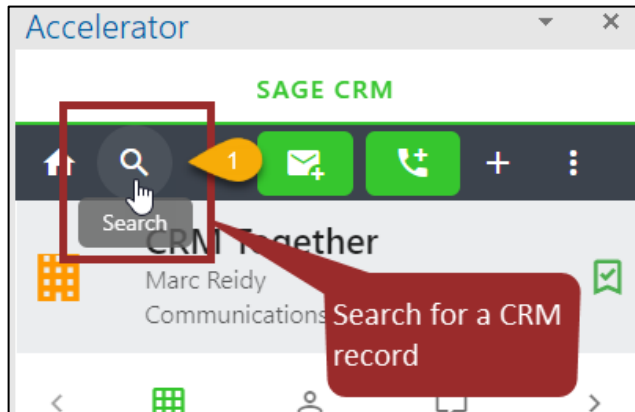
**Callouts:**

- Takes you to CRM Together website (points to the Accelerator icon in the bottom navigation bar)
- Takes you to Settings (points to the Settings icon in the bottom navigation bar)
- Click pencil icon to check your connection settings (points to the pencil icon in the Existing Connection section)
- Open the Accelerator pane (points to the Open Application button)
- Customize the appearance (points to the Font Size slider)
- Change language (points to the Language dropdown menu)

## Accelerator Menu Buttons

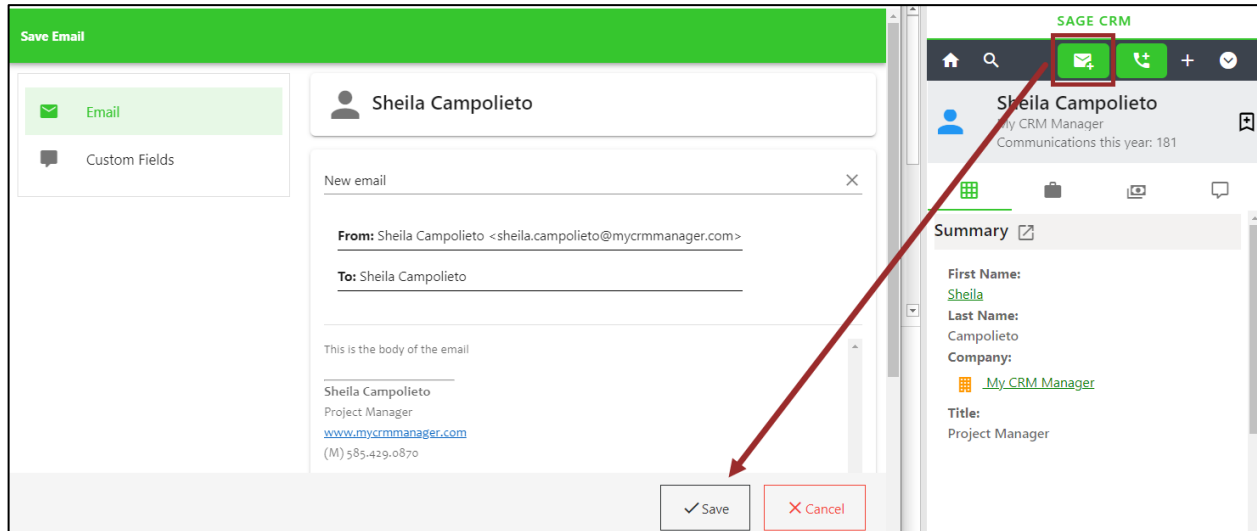
By default, when you select an email, Accelerator will attempt to find a Person match in CRM using the email address in the 'From' field. If there is no match, Accelerator will start to create a Company record by parsing the email. You can continue to create the new Company and Person record, or search for and select an existing record.

1. Search Entities
  - a. Allows you to search for a CRM record



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- b. From the record you can save an email, log a phone call, see the CRM lists, or choose additional options
- i. Saving an email saves it as a Communication 'Email In' against the current record (see Saving Emails under [Incoming Emails](#) for more details)



**Save Email**

Email

Custom Fields

Sheila Campolieto

New email

From: Sheila Campolieto <sheila.campolieto@mycrmmanager.com>

To: Sheila Campolieto

This is the body of the email

Sheila Campolieto  
Project Manager  
[www.mycrmmanager.com](http://www.mycrmmanager.com)  
(M) 585.429.0870

✓ Save X Cancel

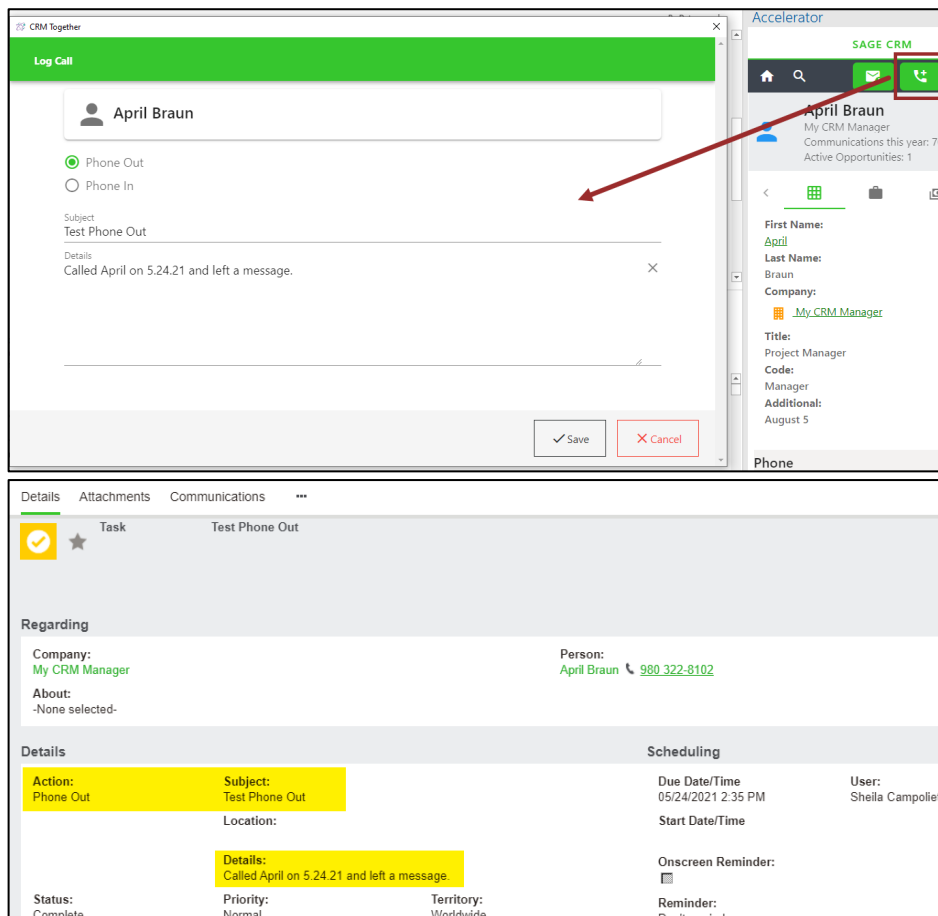
**SAGE CRM**

Sheila Campolieto  
My CRM Manager  
Communications this year: 181

Summary

First Name: Sheila  
Last Name: Campolieto  
Company: My CRM Manager  
Title: Project Manager

- ii. The phone icon allows you to enter a call and save it as a Communication record against the current record by selecting Phone Out or Phone In, filling in the details of the call, then clicking Save



**CRM Together**

**Log Call**

April Braun

Phone Out  
Phone In

Subject: Test Phone Out

Details: Called April on 5/24/21 and left a message.

✓ Save X Cancel

**Accelerator**

**SAGE CRM**

April Braun  
My CRM Manager  
Communications this year: 70  
Active Opportunities: 1

First Name: April  
Last Name: Braun  
Company: My CRM Manager  
Title: Project Manager  
Code: Manager  
Additional: August 5

**Phone**

Details Attachments Communications

Task Test Phone Out

Regarding

Company: My CRM Manager  
About: -None selected-

Person: April Braun 980 322-8102

Details

Action: Phone Out  
Subject: Test Phone Out  
Location:

Scheduling

Due Date/Time: 05/24/2021 2:35 PM  
Start Date/Time:  
User: Sheila Campolieto

Details: Called April on 5/24/21 and left a message.

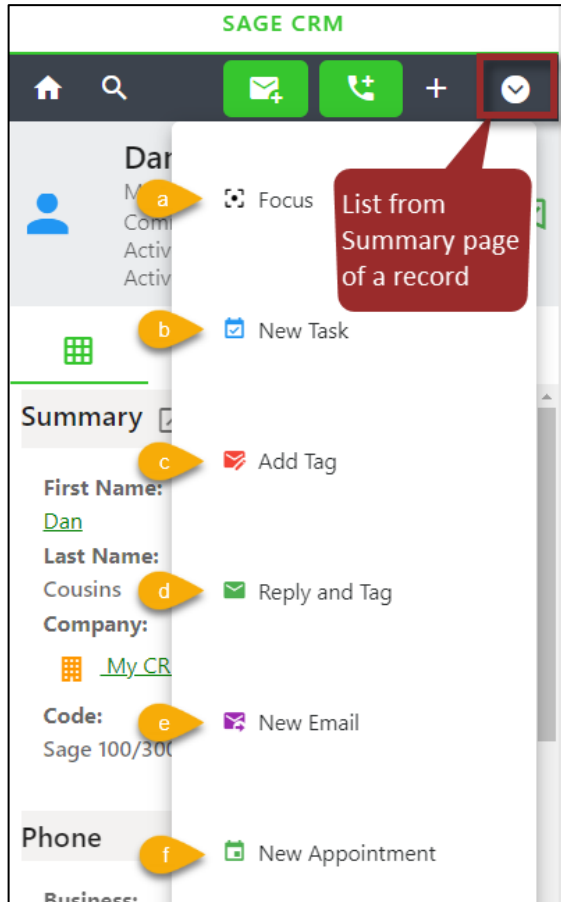
Status: Complete  
Priority: Normal  
Territory: Worldwide

Onscreen Reminder:  
Reminder: Don't remind me



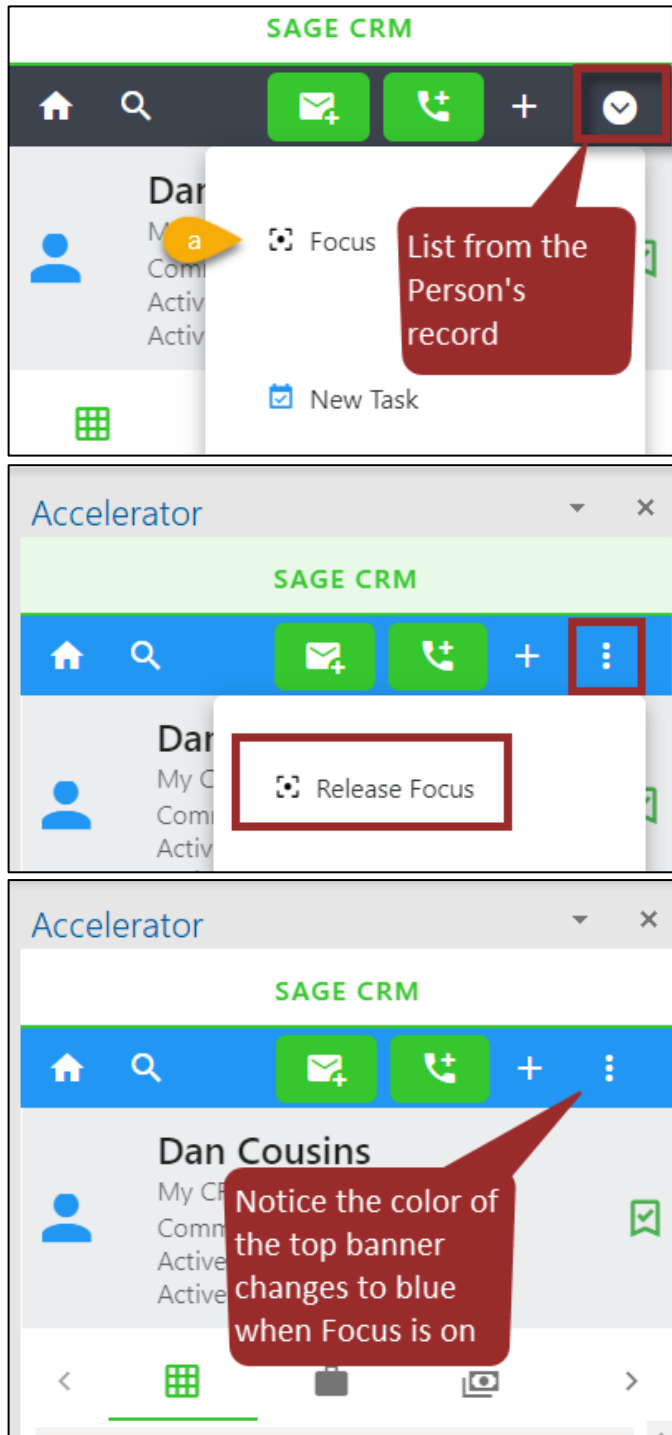
## 2. Record Menu

From the context of a selected record on the Accelerator pane, you can use Focus, New Task, Add Tag, Reply and Tag, New Email, and New Appointment (see below for details about each)



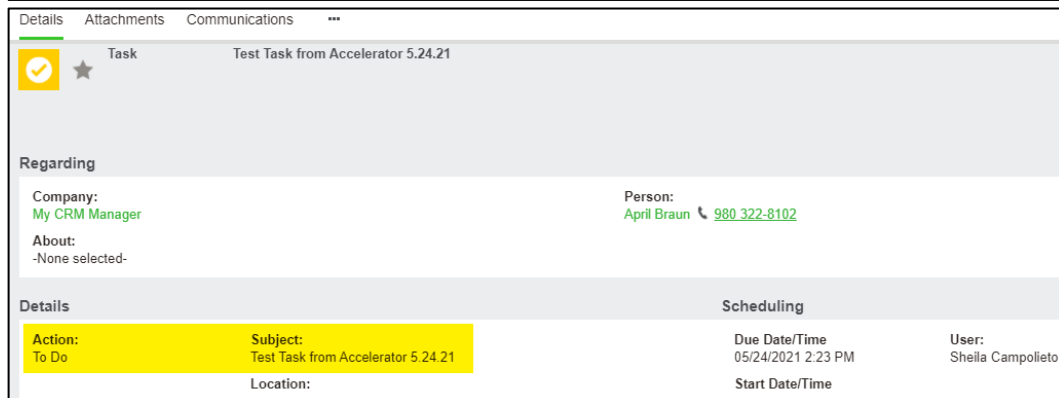
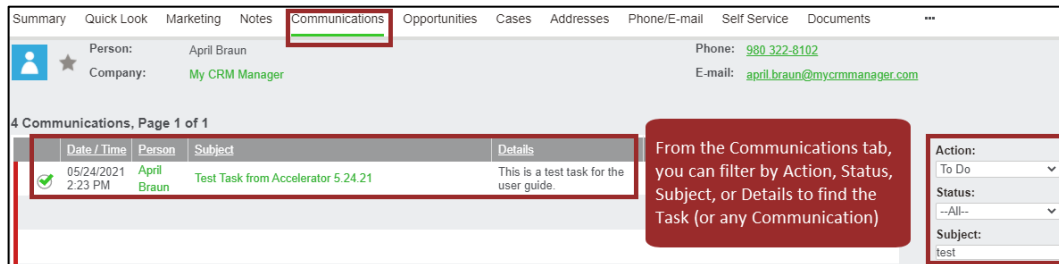
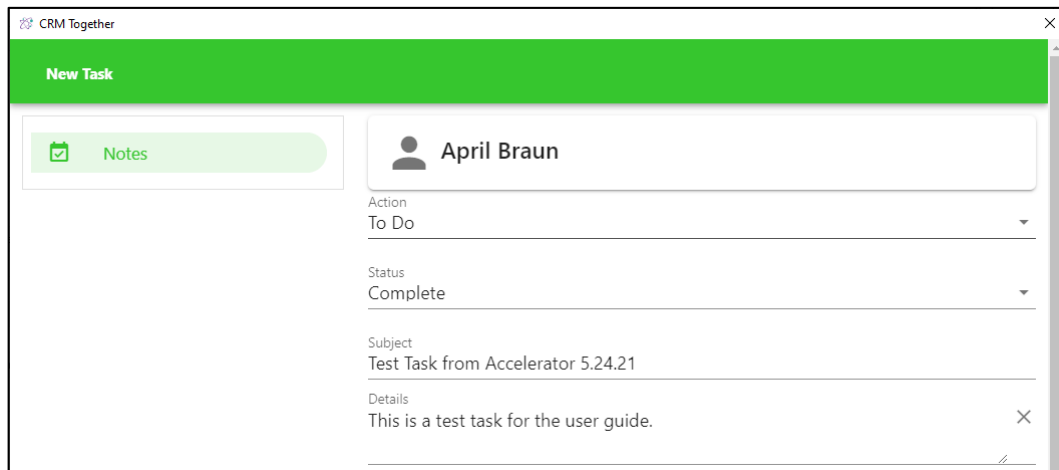
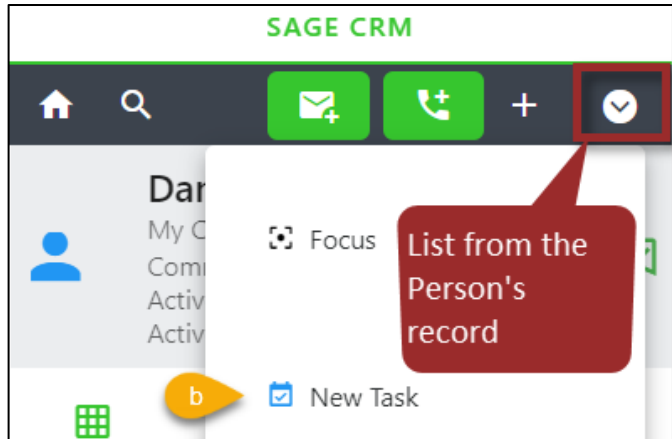
a. Focus

Focus freezes the Accelerator Pane on a specific record. This is practical because you can then assign multiple email messages to that CRM record without the pane changing during the automatic CRM search after each selected email. Focus is indicated by a blue bar at the top. It must be manually released by selecting **Release Focus**.



## b. New Task

New Task creates a Communication under the record that is displayed in the Accelerator pane.

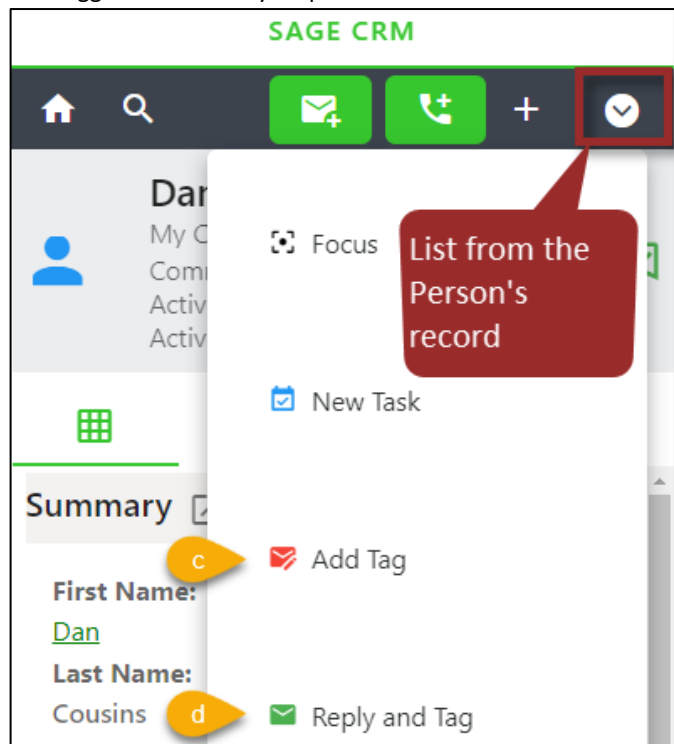


c. Add Tag

Add Tag adds a reference number at the bottom of the email; the top banner of the Accelerator record turns yellow and the Accelerator pane opens up each time you highlight the tagged email, and all responses; this can be a Case ID or a randomly assigned number in the absence of a Case (i.e.: you receive an email that needs to reference an existing CRM Case → search for the Company, select the Case icon, find the Case, click on the small Case icon, click Tag Email; the Case ID will be referenced)

d. Reply and Tag

Reply and Tag adds a reference number at the bottom of the email and replies to everyone on the email; the top banner of the Accelerator record turns yellow and the Accelerator pane opens up each time you select the tagged email or any responses



**From:** Sheila Campolieto <[sheila.campolieto@mycrmmanager.com](mailto:sheila.campolieto@mycrmmanager.com)>  
**Sent:** Tuesday, May 18, 2021 12:08 PM  
**To:** Dan Cousins <[dan.cousins@mycrmmanager.com](mailto:dan.cousins@mycrmmanager.com)>; April Braun <[april.braun@mycrmmanager.com](mailto:april.braun@mycrmmanager.com)>  
**Subject:** Test email

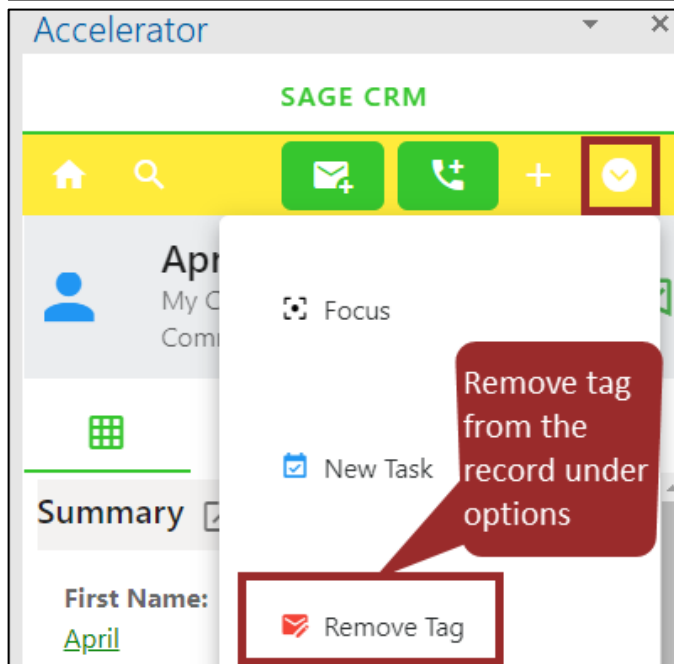
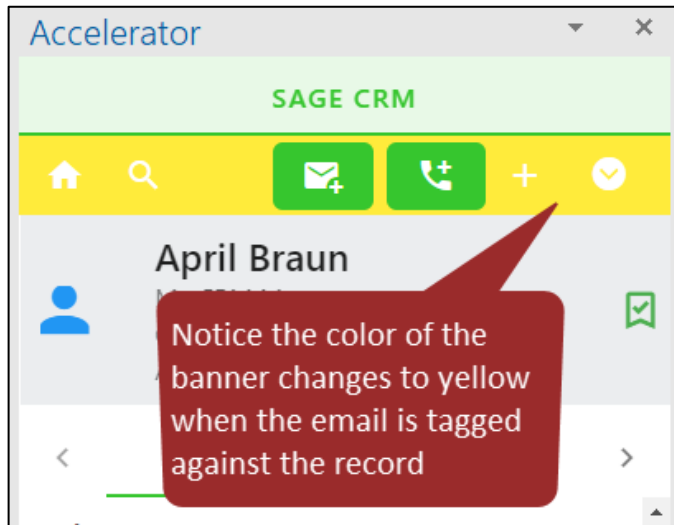
Test email with tag. Refer to the bottom of the email.

Sheila Campolieto  
 Project Manager  
[www.mycrmmanager.com](http://www.mycrmmanager.com)  
 (M) 585.429.0870



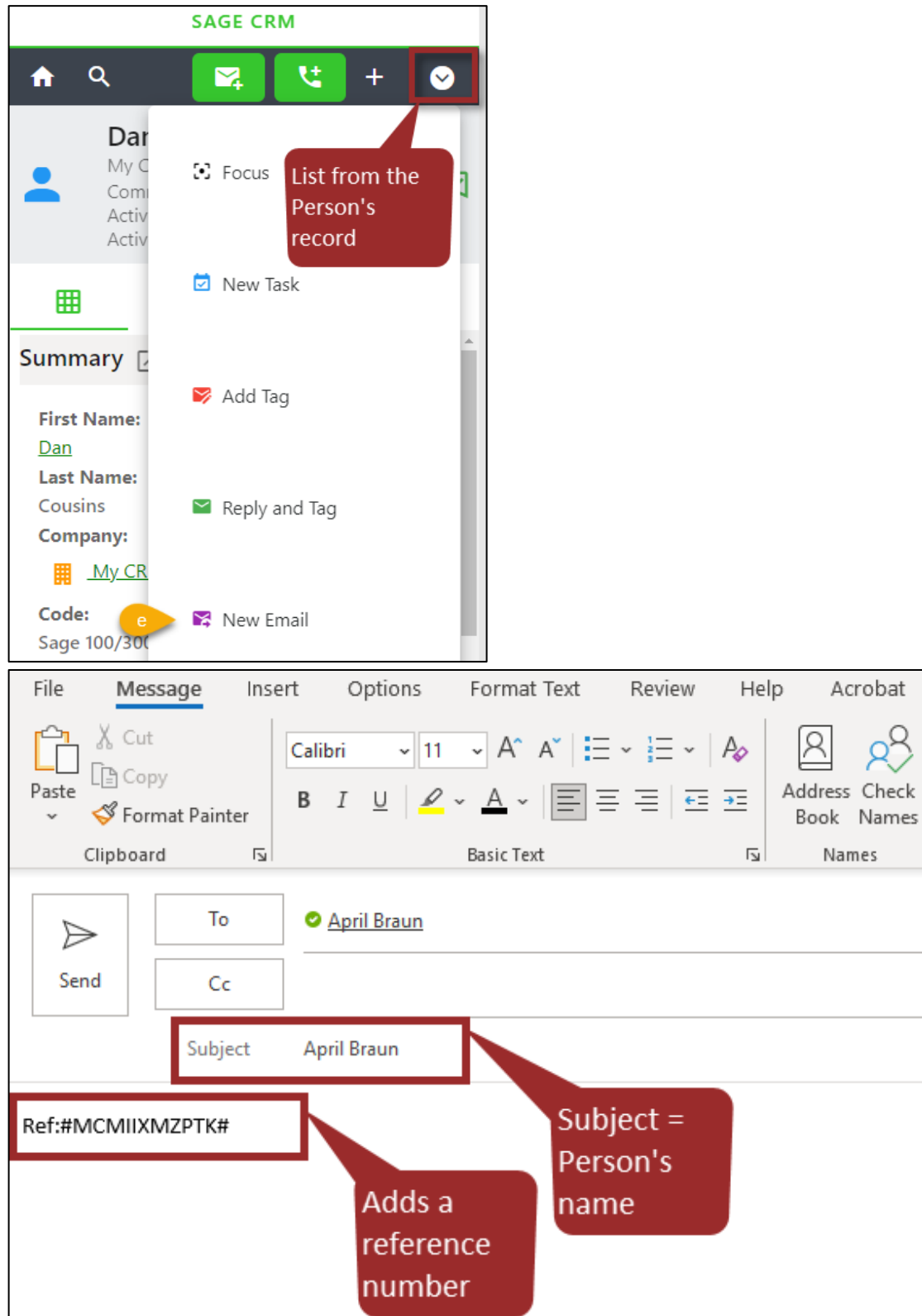
Ref:#MCMIIIXMZPTK#

Tag is at the  
bottom of the  
email



e. New Email

New Email opens a new email using the email address on the record you have open in Accelerator, removes the default signature if there is one, adds a tag to the body, adds the person's name to the Subject



The screenshot illustrates the 'New Email' process in SAGE CRM. The top panel shows a person's record for 'Dan' with fields for First Name, Last Name, Company, and Code. A red callout points to the 'New Email' button. The bottom panel shows the email composition window with fields for To, Cc, Subject, and Ref. Red callouts explain the 'Subject' and 'Ref' fields.

**Top Panel (Person's Record):**

- First Name:** Dan
- Last Name:** Cousins
- Company:** My CR
- Code:** Sage 100/300
- Buttons:** Focus, New Task, Add Tag, Reply and Tag, New Email

**Bottom Panel (Email Composition):**

- To:** April Braun
- Cc:**
- Subject:** April Braun
- Ref:** #MCMIIIXMZPTK#

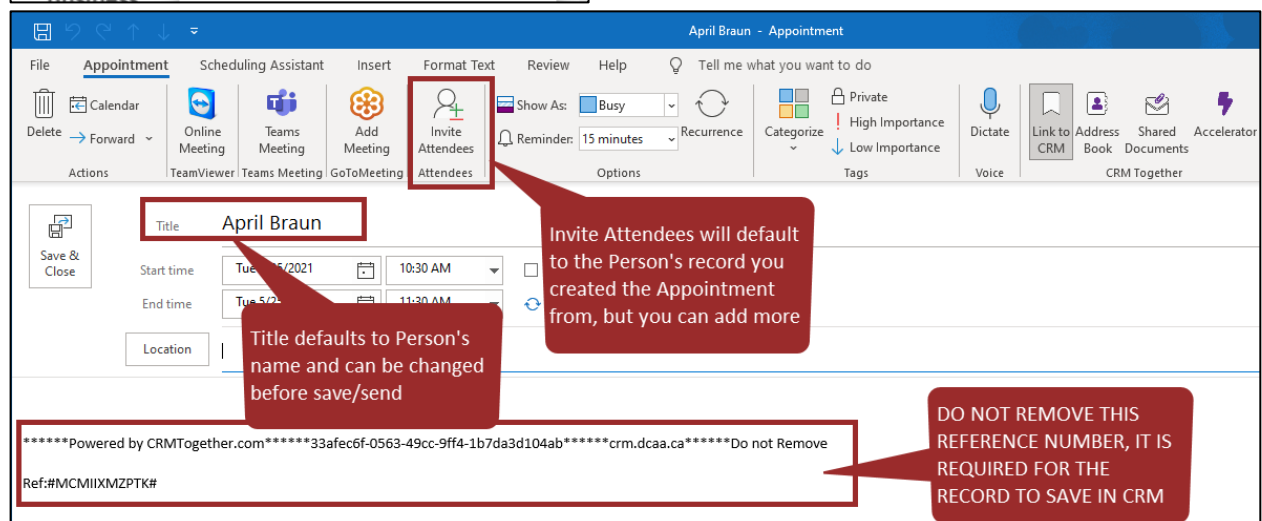
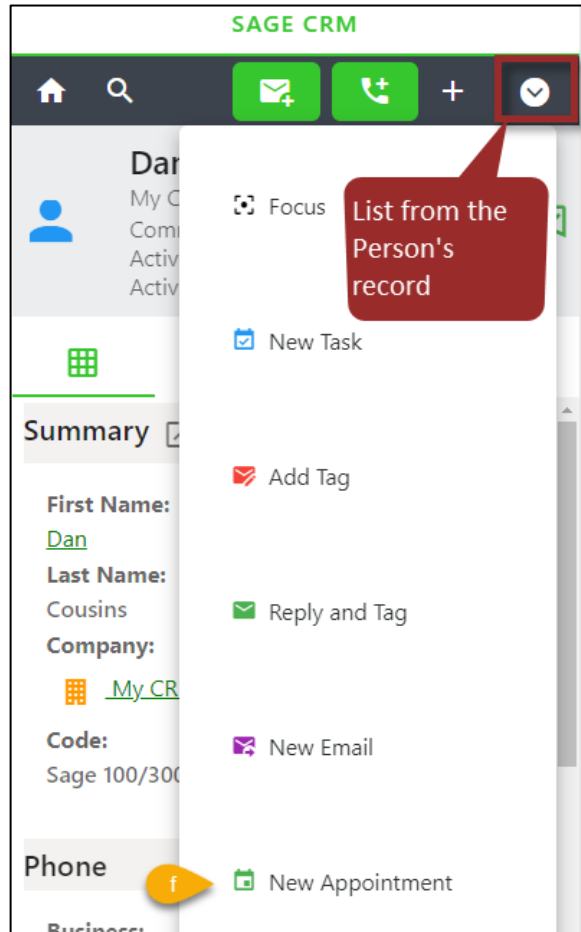
**Callouts:**

- List from the Person's record:** Points to the 'New Email' button.
- Subject = Person's name:** Points to the 'Subject' field.
- Adds a reference number:** Points to the 'Ref' field.

## f. New Appointment

New Appointment must be created from the Person's record on the Accelerator pane in order for it to save to your CRM Calendar and under the Communications tab of the Person's record

If you do not create the appointment from Accelerator, and just use the New Appointment button from Outlook, you can use the 'Link to CRM' button on the calendar item and it will still show up under your CRM Calendar, but will not be linked to a CRM record



You can attach a document from CRM to a New Appointment by following these steps:

Click Accelerator icon > click the Options icon > click Attach File

\*\*\*\*\*Powered by CRMTogether.com\*\*\*\*\*b0b5a448-6ed4-4c9f-b269-7aa2179

Ref:#MCMIXMZFLP#

CRM Together

### Attach Documents

Select documents to attach and click okay

invoice

File	Description
SMITH31 Sage CRM service invoice Jan 3.2020.pdf	
SMITH30 Sage CRM service invoice Dec 3.2019.pdf	

Enter the key word(s) into the search bar and click the magnifying glass

10 1-2 of 2

Click the paper clip to preview the document

Highlight the document you want to attached to the New Appointment

SMITH31 Sage CRM service invoice Jan 3.2020.pdf 68 KB

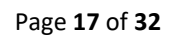
SMITH31 Sage CRM...pdf [Open File](#)

Close

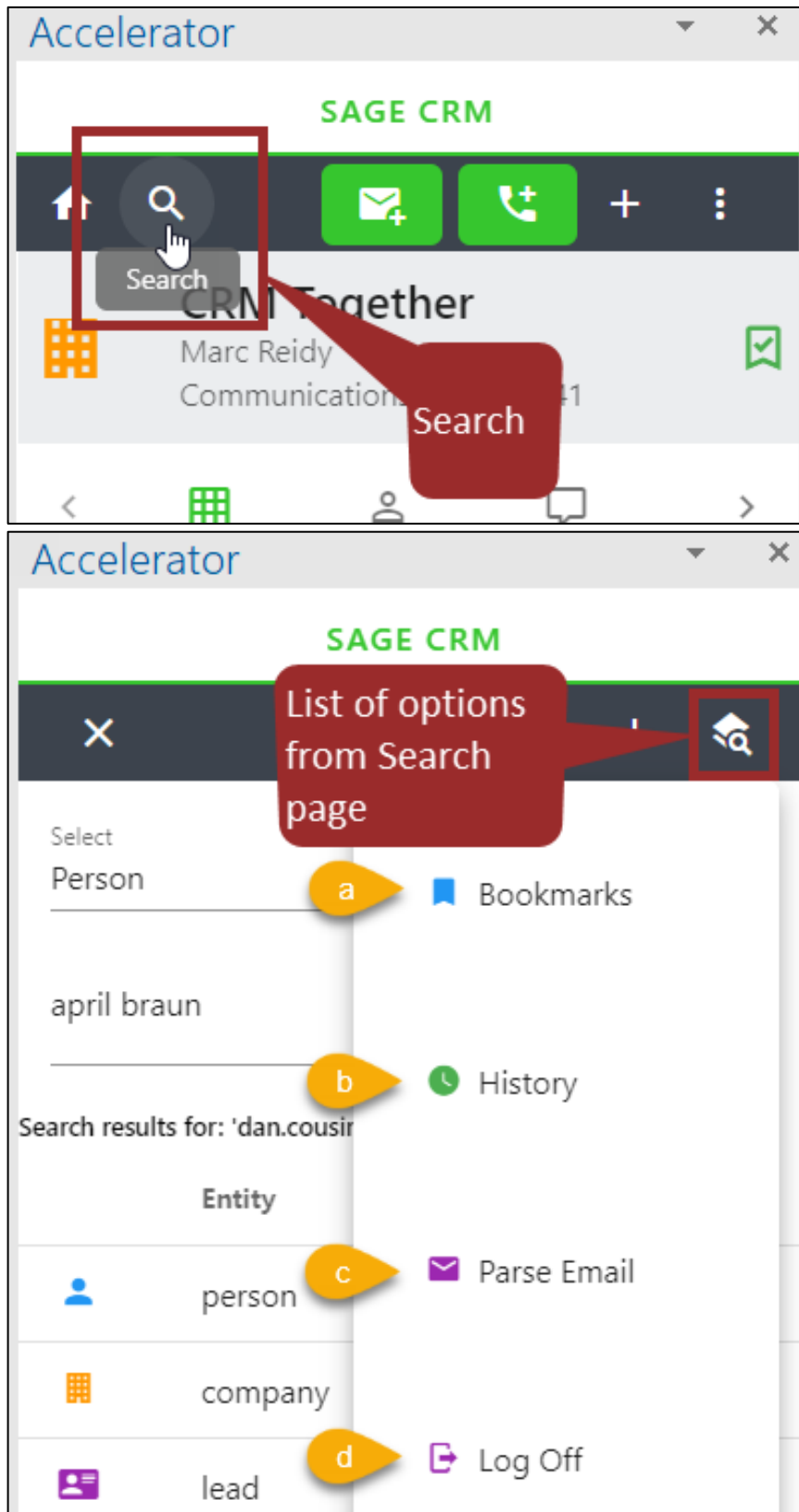


**My CRM Manager**  
 Dan Cousins  
 Communications this year: 489  
 Active Cases: 8  
 Active Opportunities: 3

Navigation bar icons: Summary (grid), People (person), Comms (speech bubble), More (arrow).

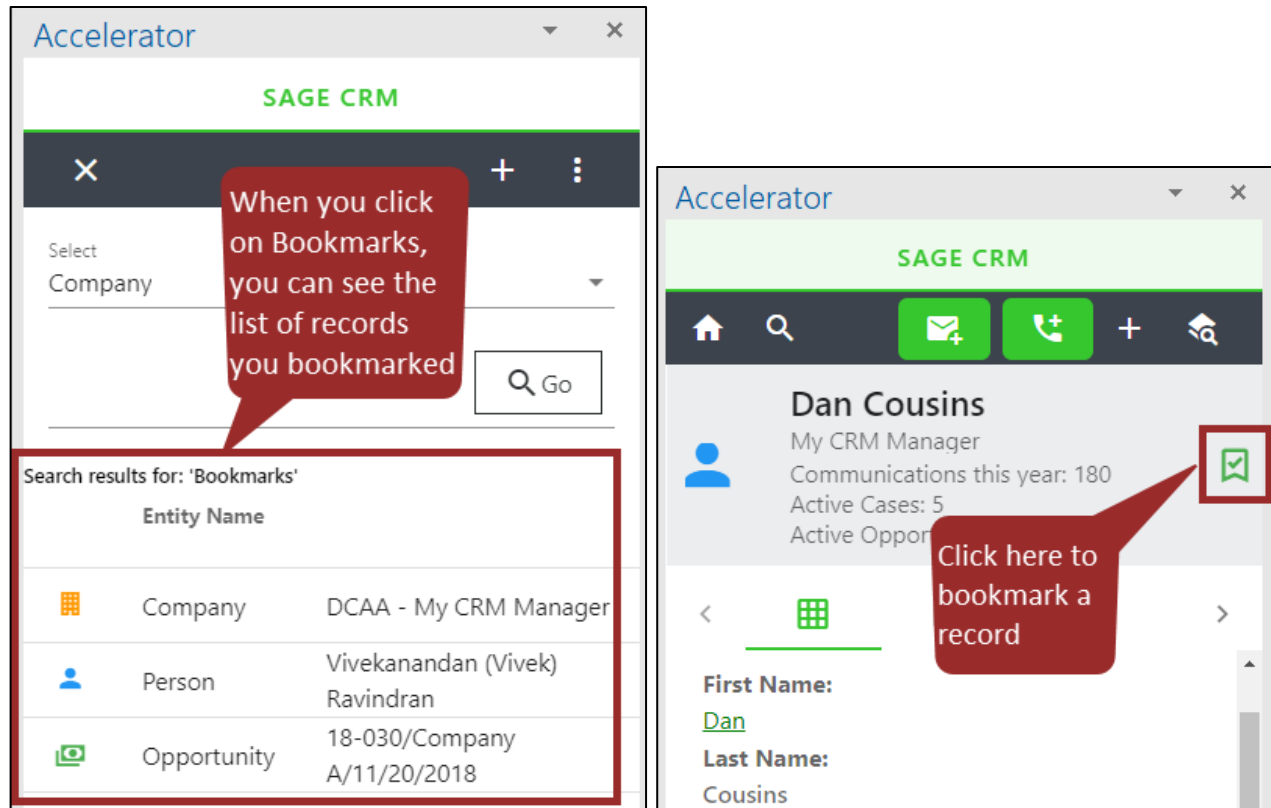


#### 4. Additional Search Options






#### a. Bookmarks

Bookmarks list all the records that have been bookmarked

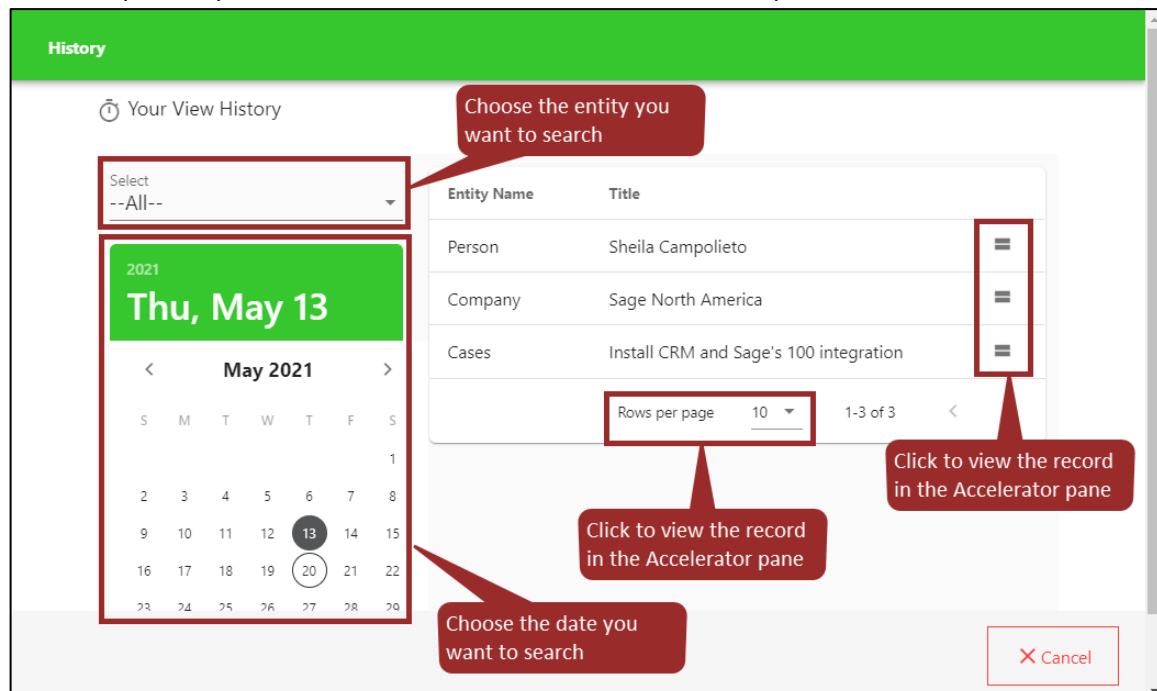


**Search results for: 'Bookmarks'**

	Entity Name	
	Company	DCAA - My CRM Manager
	Person	Vivekanandan (Vivek) Ravindran
	Opportunity	18-030/Company A/11/20/2018

#### b. History

History allows you to search for and select a record based on entity and date



**History**

Your View History

Select --All--

2021  
Thu, May 13

May 2021

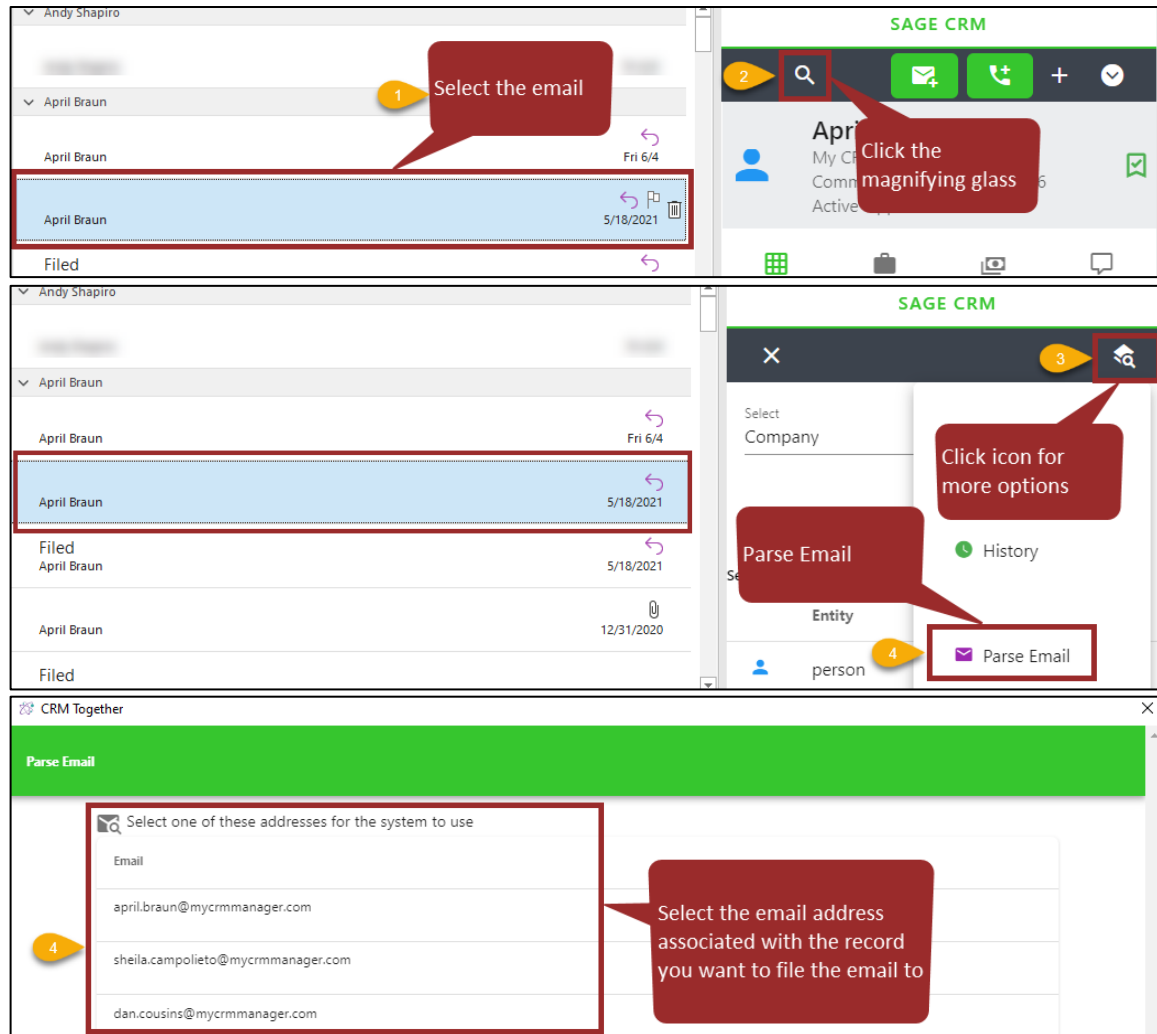
Entity Name	Title
Person	Sheila Campolieto
Company	Sage North America
Cases	Install CRM and Sage's 100 integration

Rows per page 10 1-3 of 3

Cancel

### c. Parse Search

Parse Search searches all email addresses associated with the selected email



1 Select the email

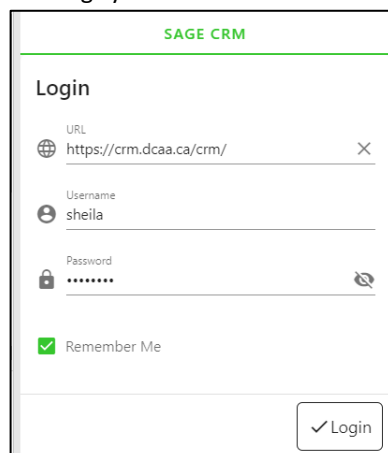
2 Click the magnifying glass

3 Click icon for more options

4 Select the email address associated with the record you want to file the email to

### d. Log Off

Logs you out of Accelerator



SAGE CRM

Login

URL  
https://crm.dcaa.ca/crm/

Username  
sheila

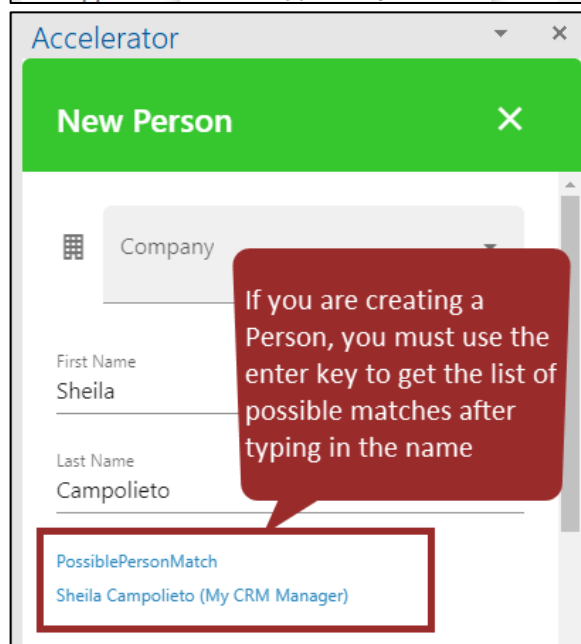
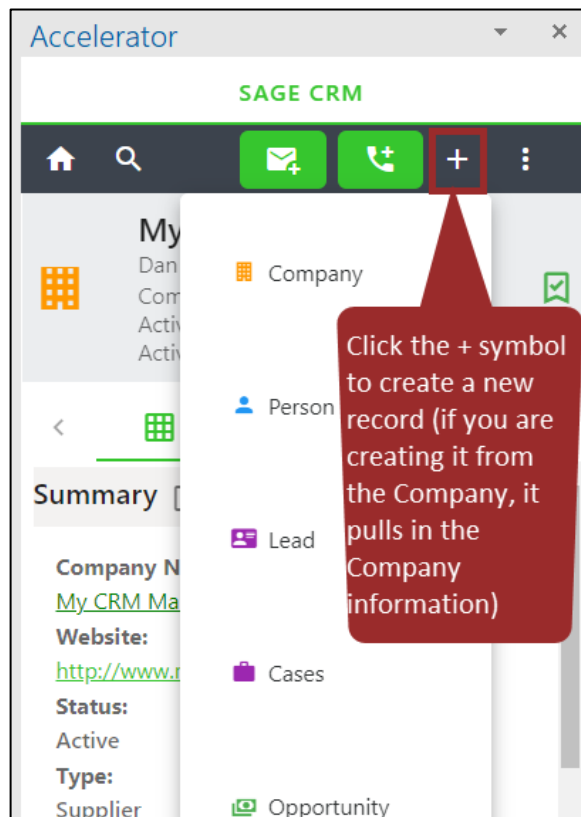
Password  
\*\*\*\*\*

☒ Remember Me

Login

## 5. Create New Records

- The plus symbol allows you to create a new record based on the data in the email (a best practice for new Person, Opportunity, or Case is to first go to the appropriate Company record and then create the new record)
- You can also create a new Company, regardless of the email you have highlighted, and remove all of the pre-populated information



## Incoming Emails

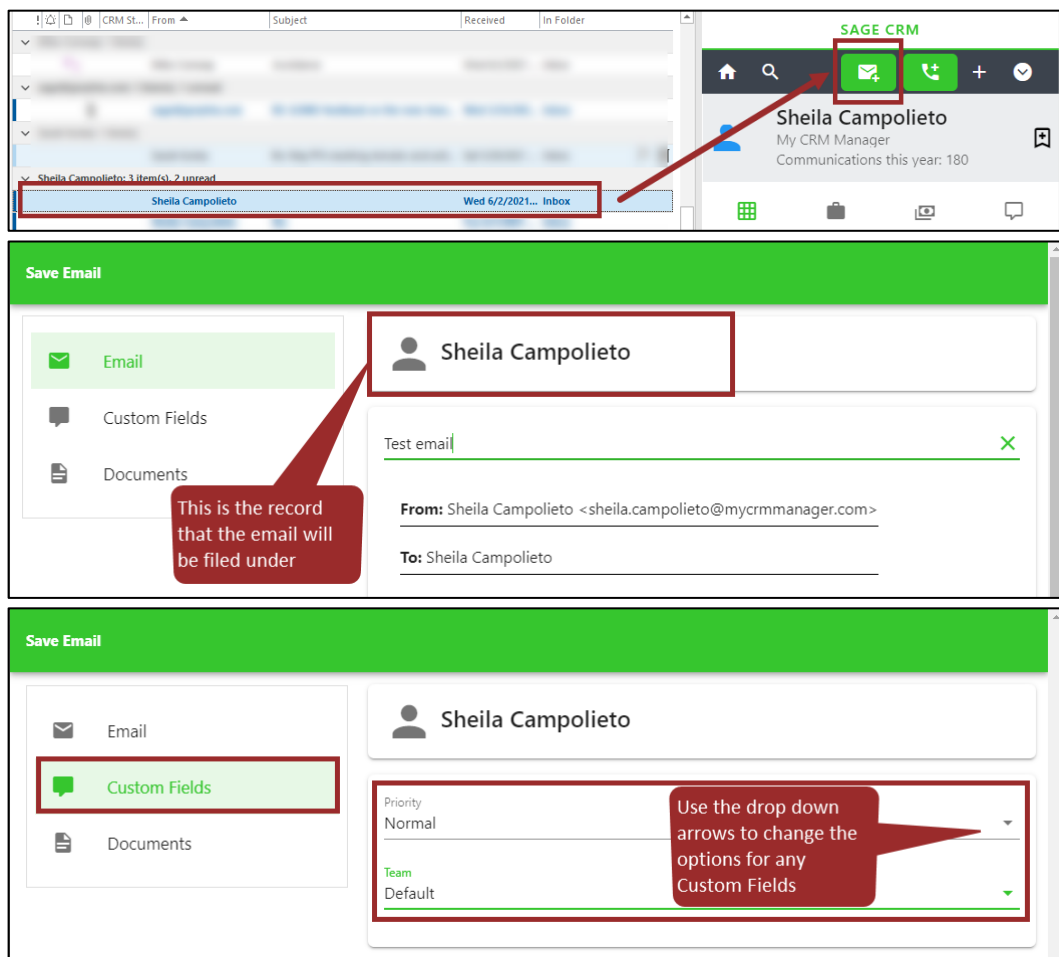
### 1. Email Matching

When an email is received, Accelerator will search CRM based on a tag reference, or the email address in the 'From' field, and display the Person record in the Accelerator pane. Accelerator attempts to match the email in the following order:

- Tag – checks for a tag and if there is, searches CRM based on the tag
- Person Email – checks for a Person record with a matching email address
- Company Email – checks for a Company record with matching domain
- Lead Email – checks for a Lead record with a matching email address
- If no match is found – checks for a matching domain under a Person record, if there is a single match, Accelerator shows that Person's Company

### 2. Saving Emails

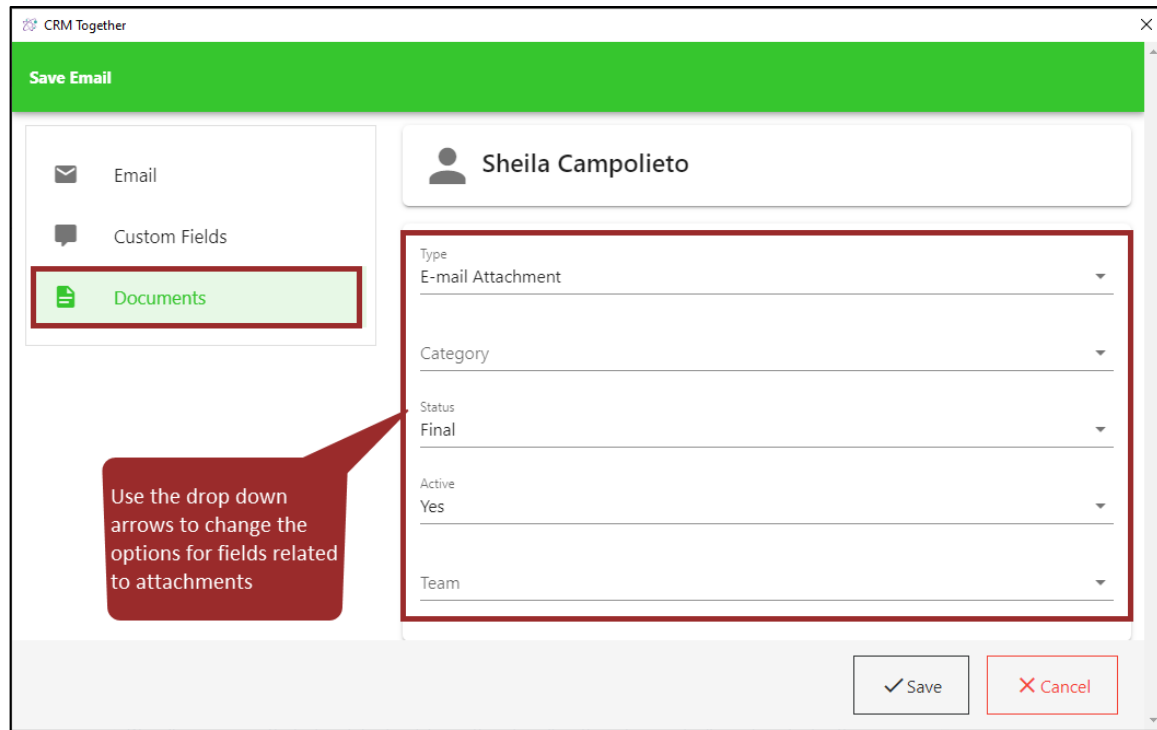
- From your Inbox, click on the email you want to file (do not open it)
- Confirm the record in the Accelerator Pane is correct
- Select Save Email button
  - If you save to a Person, it also saves to the Company that the Person is under
  - If you save to a Company, Case, or Opp, it also saves to a Person record that has an exact match to the email address in the 'From' field



The screenshot illustrates the workflow for saving an incoming email to a CRM record. It is divided into three main sections:

- Top Section (Inbox View):** Shows an email list with a highlighted entry for "Sheila Campolieto" dated "Wed 6/2/2021...". A red box highlights the "Save" icon (a green envelope with a checkmark) in the top right of the interface.
- Middle Section (Save Email Dialog):** A dialog box titled "Save Email" is shown. On the left, there are three options: "Email", "Custom Fields", and "Documents". The "Email" option is selected. On the right, the record for "Sheila Campolieto" is displayed, including her name, a "Test email" field, and the "From" and "To" fields. A red callout bubble points to the "Email" option with the text: "This is the record that the email will be filed under".
- Bottom Section (Save Email Dialog - Custom Fields):** This section shows the same "Save Email" dialog, but with the "Custom Fields" option selected. It displays fields for "Priority" (set to "Normal") and "Team" (set to "Default"). A red callout bubble points to the "Priority" and "Team" fields with the text: "Use the drop down arrows to change the options for any Custom Fields".

- iii. Documents – allows you to specify the Communication record attributes (the fields displayed here can be customized to your CRM documents)



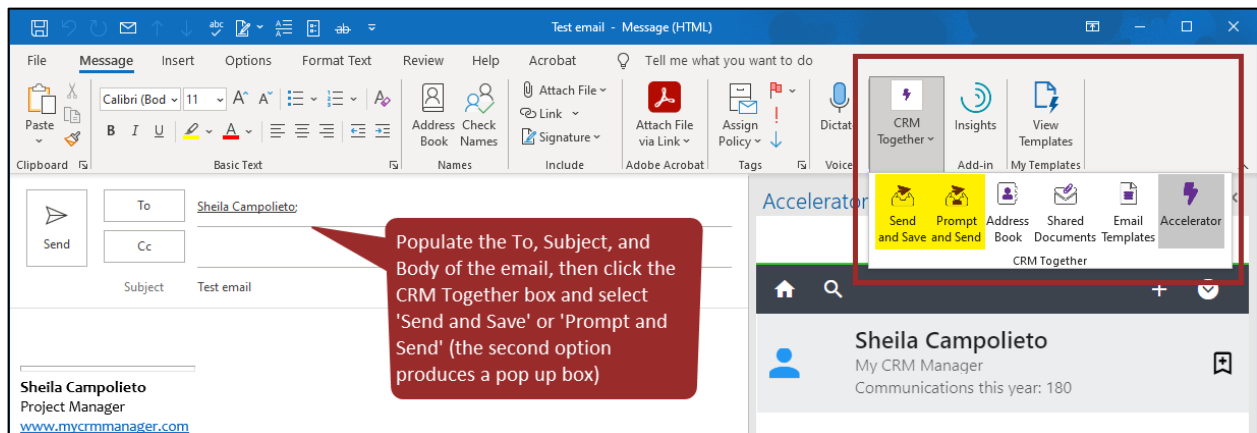
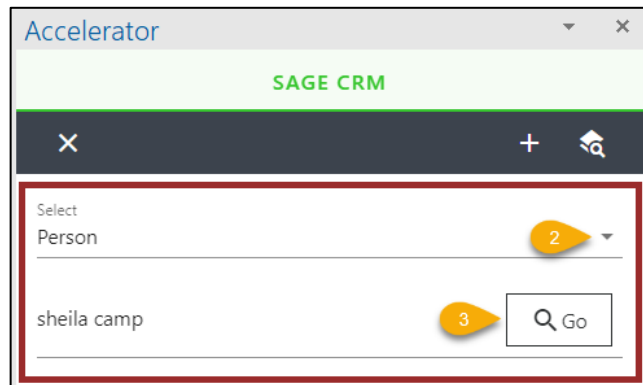
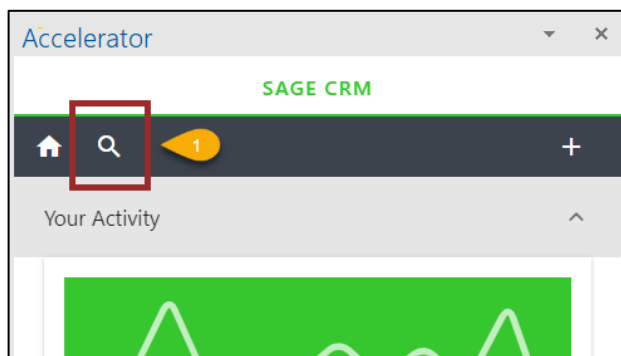
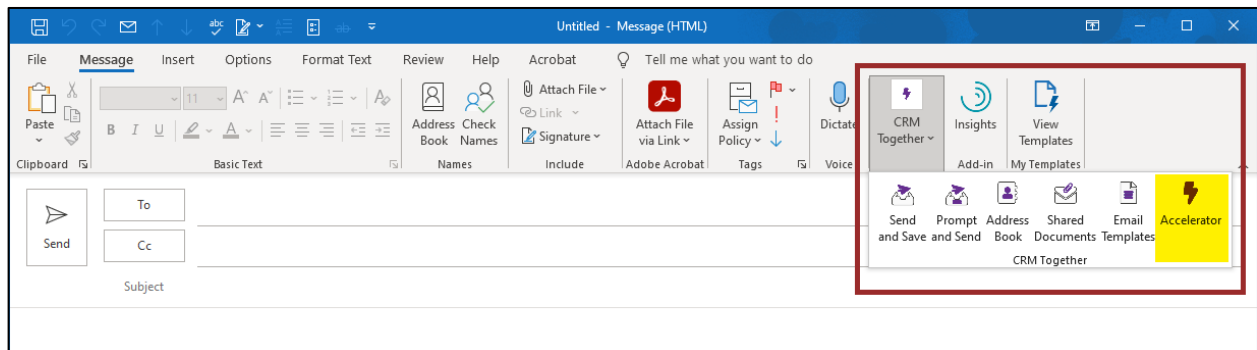
The screenshot shows the 'Save Email' window in CRM Together. On the left, there is a sidebar with three options: 'Email', 'Custom Fields', and 'Documents'. The 'Documents' option is highlighted with a green background and a red border. A red callout box points to the 'Documents' tab with the text: 'Use the drop down arrows to change the options for fields related to attachments'. The main area of the window shows the 'Documents' tab with a red border. It contains several fields with drop-down arrows: 'Type' (set to 'E-mail Attachment'), 'Category', 'Status' (set to 'Final'), 'Active' (set to 'Yes'), and 'Team'. At the bottom right, there are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with an 'X' icon).

## Outgoing Emails

### 1. New Email using the Accelerator pane

- You can open the Accelerator pane from a new email to search for and select the record you want to file the email under before using Send and Save or Prompt and Sent
- If you are using an email template with merge fields, you must first select the record for the merge to work (i.e. pull in the Person's first name)

From the new email, click on the CRM Together icon → Accelerator → Search → Select → Person (or Company) → enter name of Person (or Company) → Go (click icon to select record if there is more than one result)





## 2. New Email without the Accelerator pane

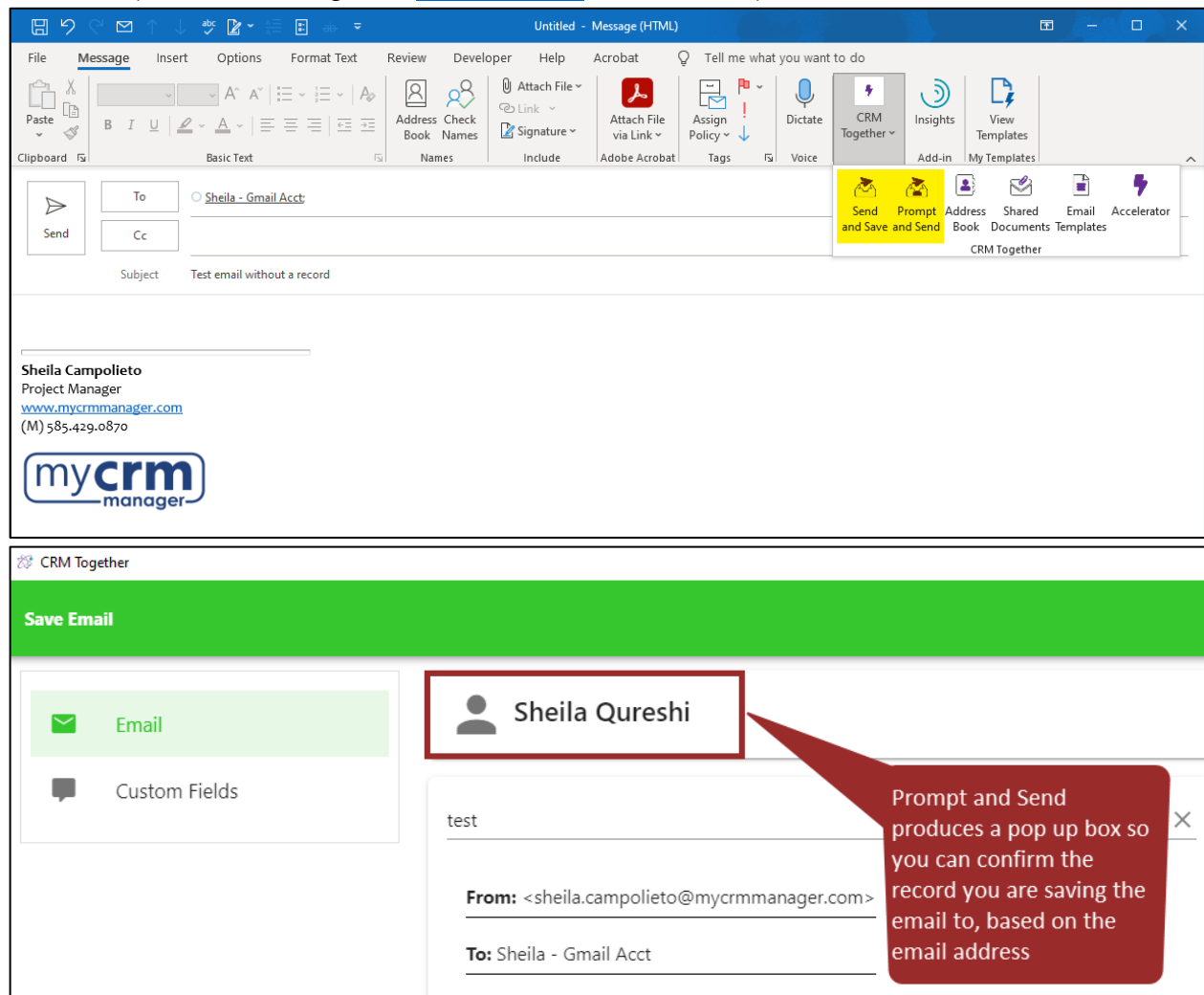
You can use the Accelerator buttons from an email without opening the Accelerator pane

### a. Send and File

Send and File sends the email and files it to CRM if the email address in the To field matches an email address in CRM (see Email Matching under [Incoming Emails](#) for more details)

### b. Prompt and Send

Prompt and Send sends the email and files it to CRM if the email address in the To field matches an email address in CRM (see Email Matching under [Incoming Emails](#) for more details)



The screenshot shows a Microsoft Word window titled "Untitled - Message (HTML)". The ribbon includes tabs for File, Message, Insert, Options, Format Text, Review, Developer, Help, and Acrobat. The Message tab is active, showing fields for To (Sheila - Gmail Acct), Cc, and Subject (Test email without a record). The body of the email contains the contact information for Sheila Campolieto, Project Manager, with a phone number and a mycrm manager logo.

Below the Word window, the CRM Together interface is shown. A green banner at the top reads "Save Email". On the left, there are buttons for "Email" and "Custom Fields". On the right, a red box highlights the name "Sheila Qureshi". A red callout box points to this name with the text: "Prompt and Send produces a pop up box so you can confirm the record you are saving the email to, based on the email address". Below the name, the email details are displayed: "test" as the subject, "From: <sheila.campolieto@mycrmmanager.com>", and "To: Sheila - Gmail Acct".

**NOTE:** If there is no email address match in CRM, and you use Send and File, the email will not be filed to a specific record and there will be no 'warning' message letting you know. The email will instead be saved as an orphaned email (i.e. not saved under any Company or Person).

You can find orphaned emails under Find → Communication and use the search fields, such as 'Created Date', 'Created By', or the 'Email Address'.

Find: Communication

Find

Type: --All--

Action: --All--

Status: --All--

Company Name:

Name:

First Name:

Subject:

Date / Time:

Between And

Created By:

Sheila Campolieto

Created Date:

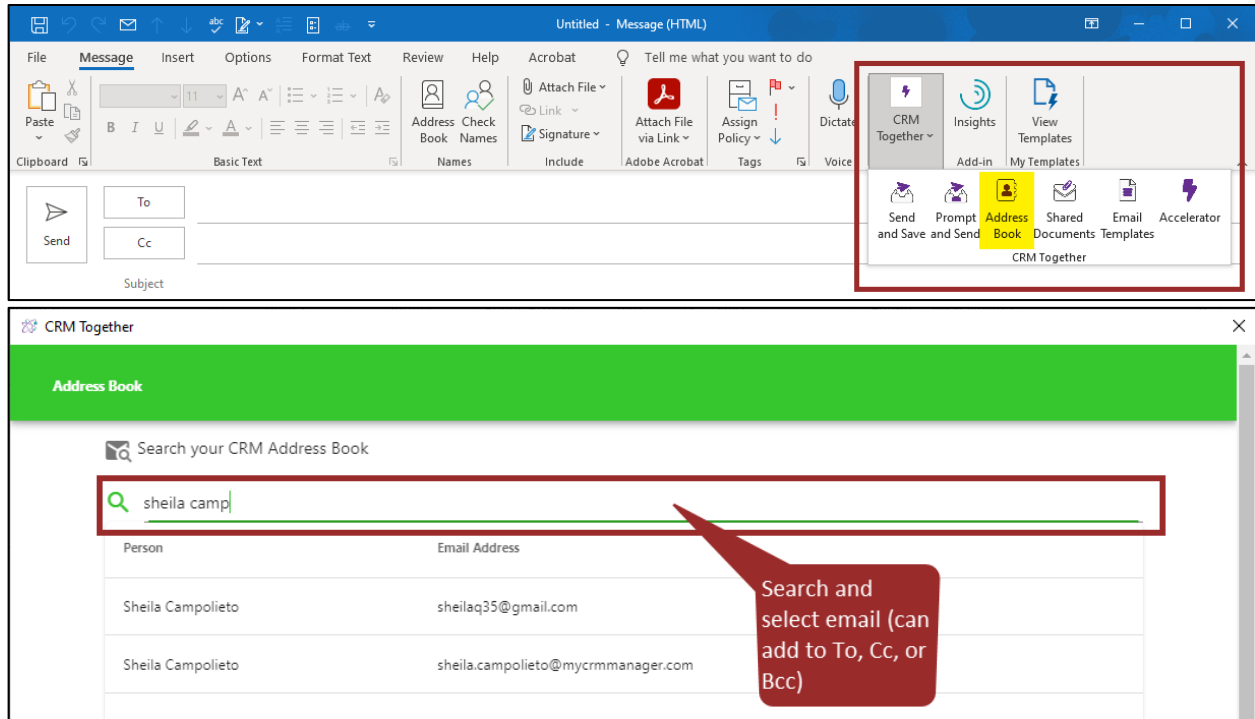
Between 03/23/2021 And 03/23/2021

2 Related communications, Page 1 of 1

	Date / Time	Person	Company Name	Action	Subject	Created Date	Territory
	03/23/2021 3:18 PM			E-mail Out	test	03/23/2021 3:19 PM	Worldwide
	03/23/2021 3:35 PM			E-mail Out	2nd test	03/23/2021 3:35 PM	Worldwide

### c. Address Book

You can use your CRM data to find email addresses by filter

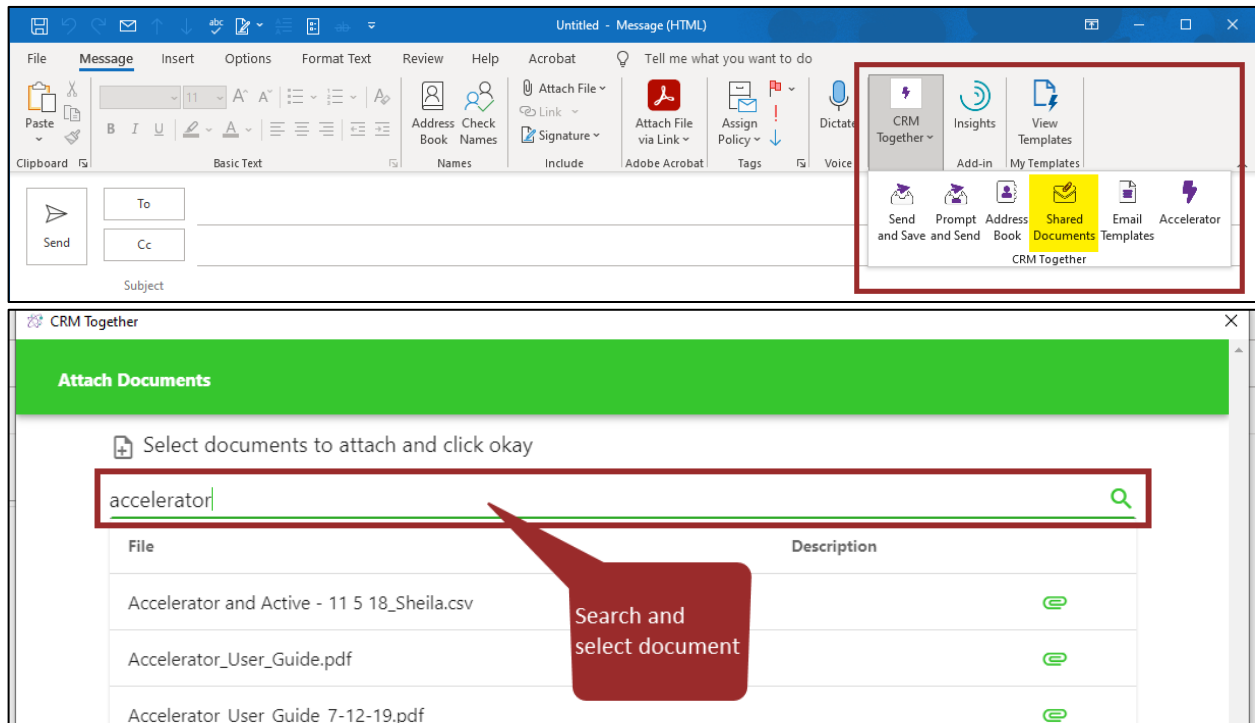


The screenshot shows the CRM Together interface with the Address Book search functionality. The top bar is green and labeled "Address Book". Below it, there is a search bar with the text "sheila camp". A red box highlights the search bar and the "Address Book" button in the CRM Together menu. A red callout box points to the search results table with the text "Search and select email (can add to To, Cc, or Bcc)".

Person	Email Address
Sheila Campolieto	sheilaq35@gmail.com
Sheila Campolieto	sheila.campolieto@mycrmmanager.com

### d. Shared Documents

You can select Shared Documents that are saved in CRM and attach them to an outgoing email

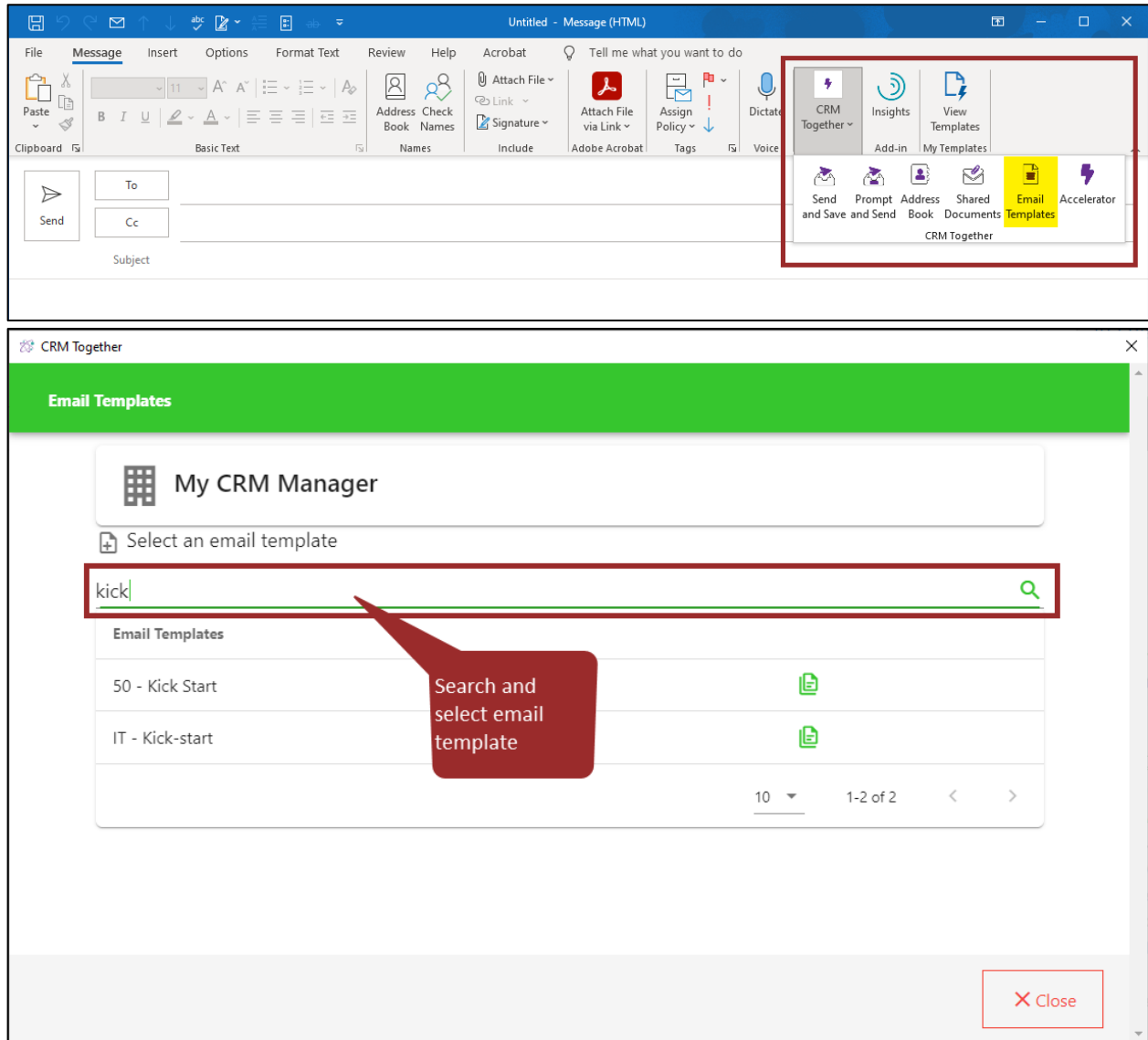


The screenshot shows the CRM Together interface with the Shared Documents search functionality. The top bar is green and labeled "Attach Documents". Below it, there is a search bar with the text "accelerator". A red box highlights the search bar and the "Shared Documents" button in the CRM Together menu. A red callout box points to the search results table with the text "Search and select document".

File	Description
Accelerator and Active - 11 5 18_Sheila.csv	
Accelerator_User_Guide.pdf	
Accelerator_User_Guide_7-12-19.pdf	

## e. Email Templates

You can access email templates saved in CRM, with saved attachment(s) if applicable; allows you to select and send from Outlook (if there are merge fields, you must first select the appropriate entity and record – see [New Email](#) under [Outgoing Emails](#) for more details)

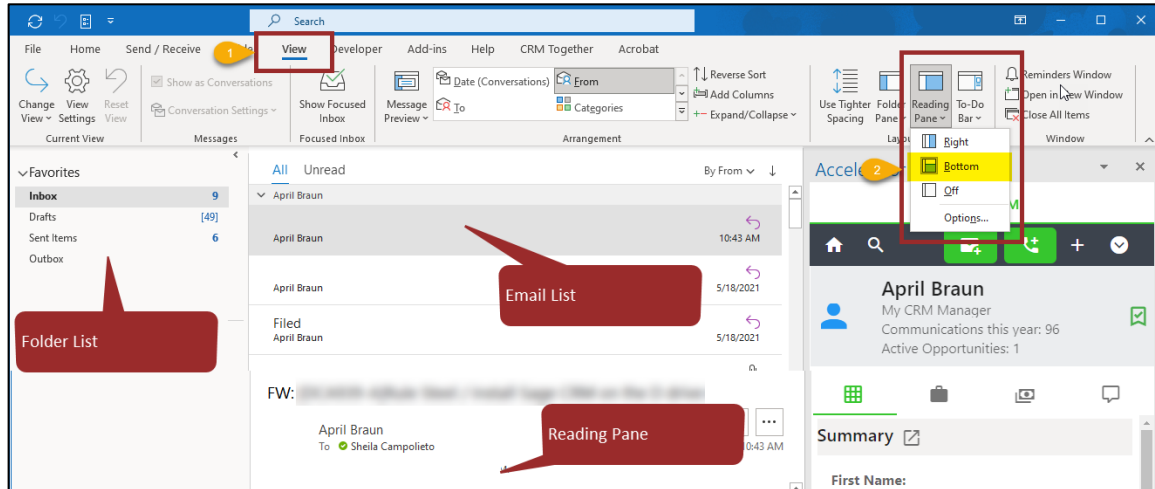


The screenshot shows the Outlook interface with the CRM Together add-in. The CRM Together ribbon is visible, and the 'Email Templates' button is highlighted. Below the Outlook window, the CRM Together 'Email Templates' dialog is open, showing a search bar with the text 'kick' and a list of templates: '50 - Kick Start' and 'IT - Kick-start'. A red callout box points to the search bar with the text 'Search and select email template'. The dialog also includes a 'Close' button at the bottom right.

## Viewing Accelerator on the Outlook Screen

### 1. Outlook Layout

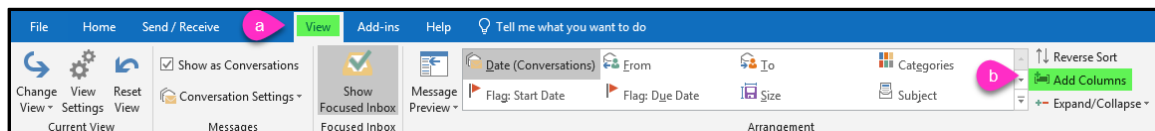
To change the layout of the Outlook screen to accommodate the addition of the new Accelerator Pane (which opens on the right side), select the **View** tab and click on **Reading Pane** and choose **Bottom**



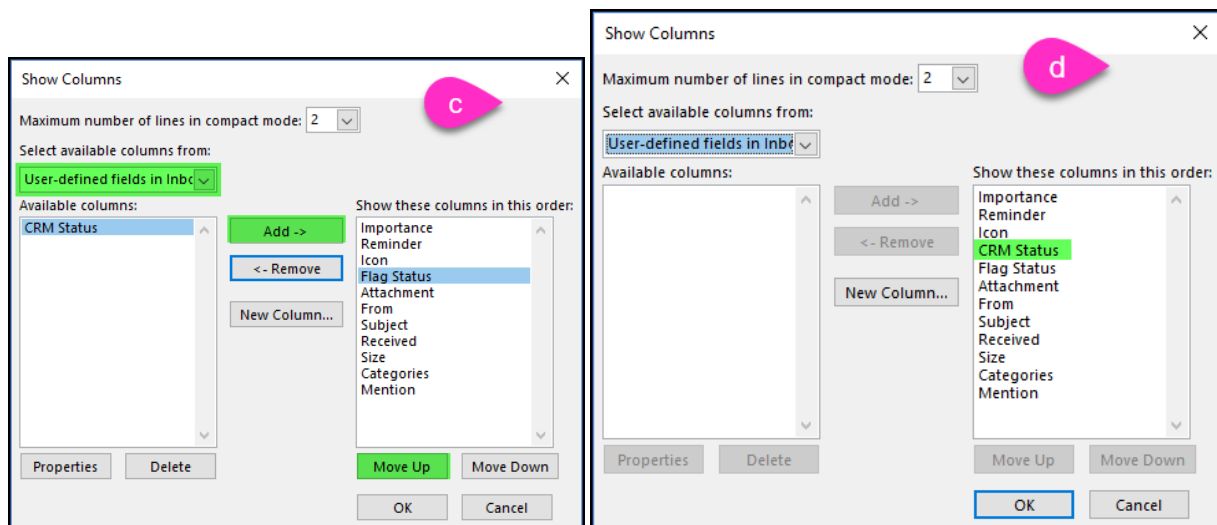
### 2. CRM Status for Inbox

**NOTE:** This status field is only displayed *after* the first email has been saved/stored in CRM  
To display the CRM Status column (if an email has already been filed using Accelerator):

- Select the **View** tab
- Click on **Add Columns**:



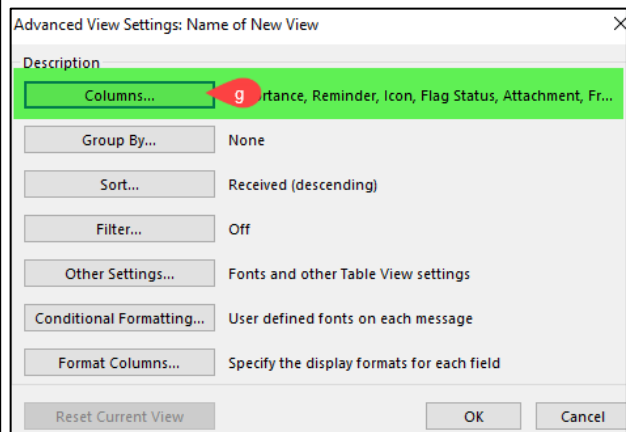
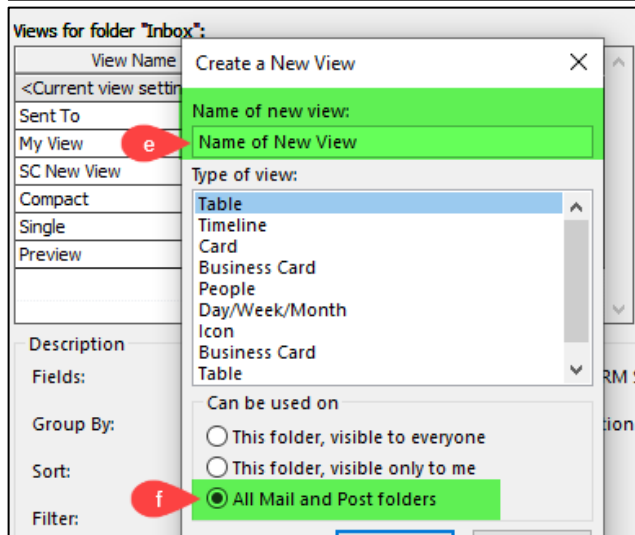
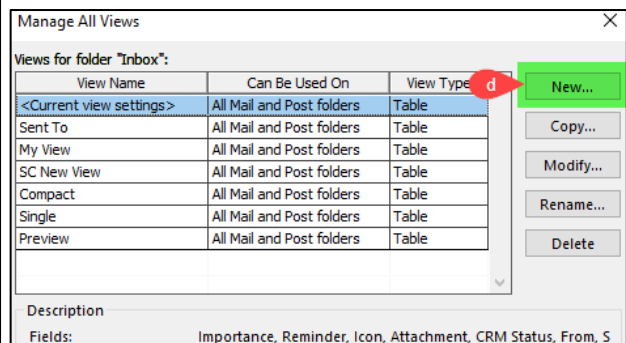
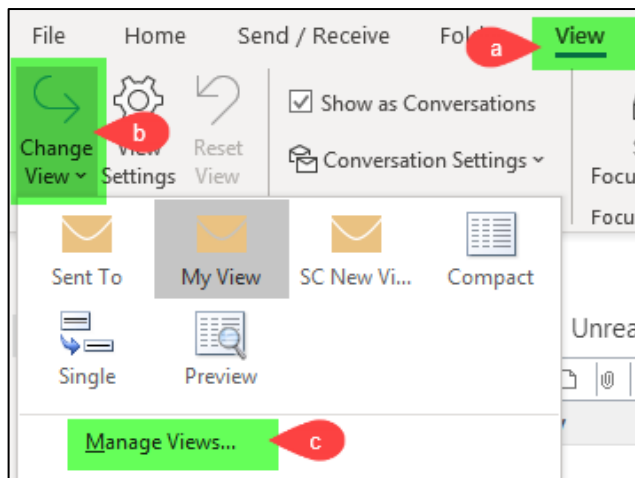
- Choose **User-defined fields in Inbox** from the available columns drop-down and select CRM Status
- Select **Add** and then move the **CRM Status** field toward the top of the list



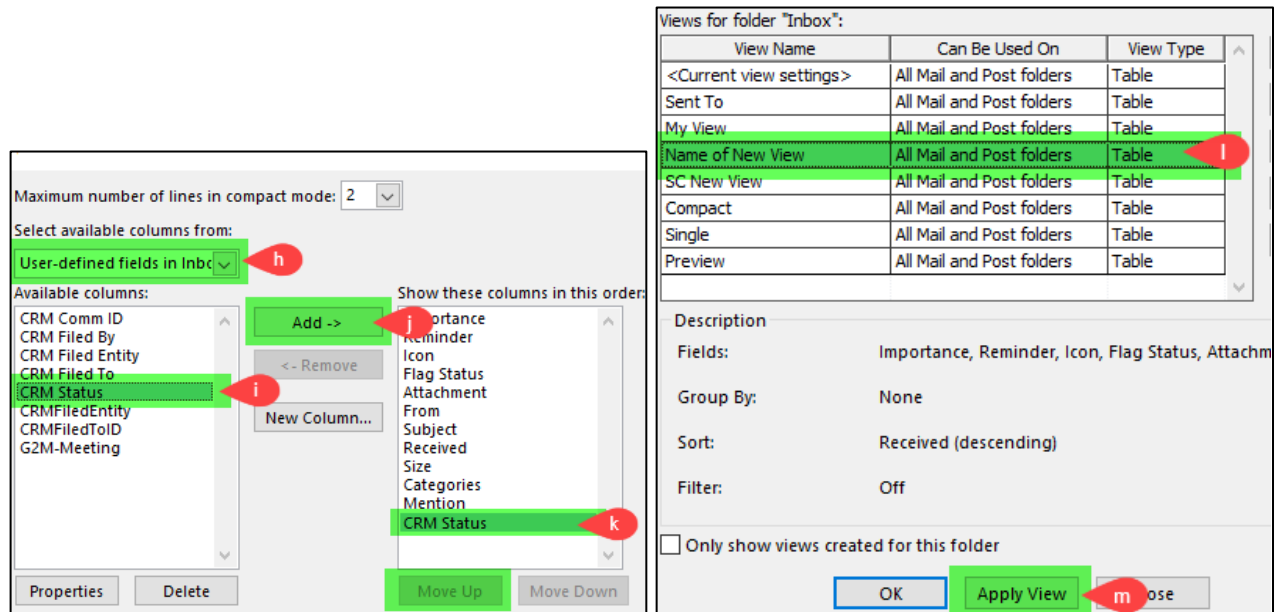
### 3. CRM Status for Subfolders

You can add CRM Status column to each subfolder individually or create a new view that adds the status field to all subfolders already created. To create a new view:

- Click View tab
- Change View
- Manage Views
- New
- Enter a name for new view
- Check the box for All Mail and Post folders → OK
- Columns



- h. Scroll down to User-defined fields in Inbox
- i. Select CRM Status
- j. Add
- k. Select CRM Status and click Move Up to place the CRM Status column where you choose → OK
- l. Select the new view just created
- m. Apply View (this applies the view to the highlighted folder, continue to next steps to apply view to all)



Views for folder "Inbox":

View Name	Can Be Used On	View Type
<Current view settings>	All Mail and Post folders	Table
Sent To	All Mail and Post folders	Table
My View	All Mail and Post folders	Table
Name of New View	All Mail and Post folders	Table
SC New View	All Mail and Post folders	Table
Compact	All Mail and Post folders	Table
Single	All Mail and Post folders	Table
Preview	All Mail and Post folders	Table

Description

Fields: Importance, Reminder, Icon, Flag Status, Attachment, From, Subject, Received, Size, Categories, Mention, CRM Status

Group By: None

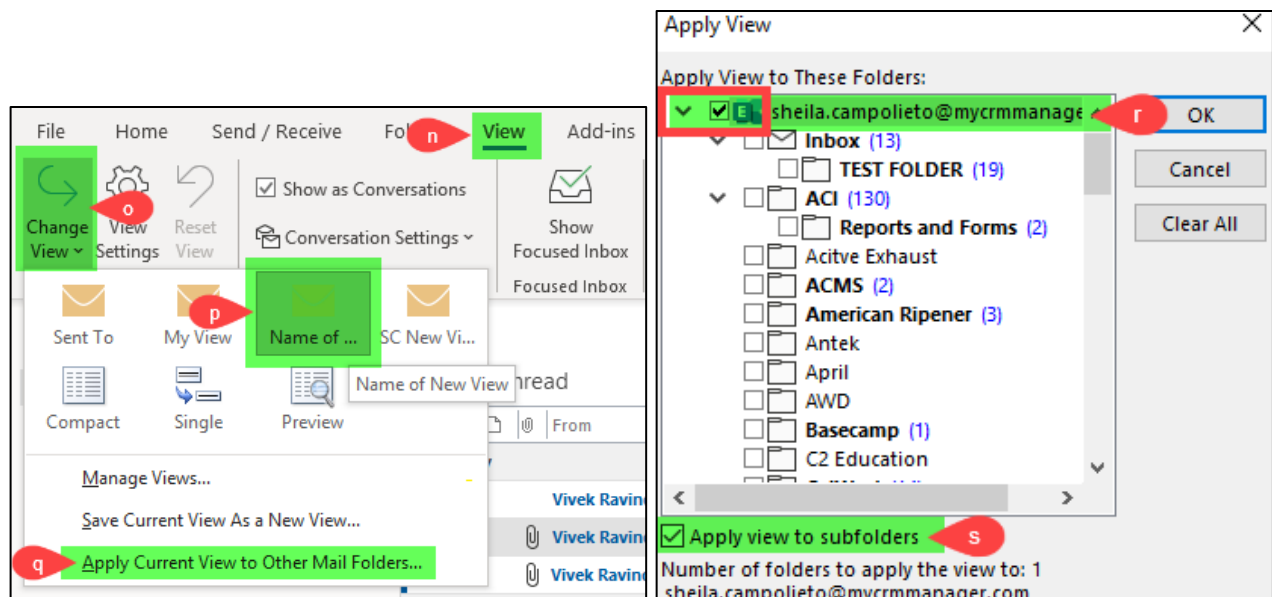
Sort: Received (descending)

Filter: Off

☐ Only show views created for this folder

OK Apply View Close

- n. View tab
- o. Change View
- p. Select new view
- q. Apply Current View to Other Mail Folders
- r. Check the box for the main folder
- s. Check the box for Apply view to subfolders → OK (all folders and subfolders should now have the CRM Status column visible)



Apply View

Apply View to These Folders:

- ☒ sheila.campolieto@mycrmmanager.com
- ☐ Inbox (13)
- ☐ TEST FOLDER (19)
- ☐ ACI (130)
- ☐ Reports and Forms (2)
- ☐ Active Exhaust
- ☐ ACMS (2)
- ☐ American Ripener (3)
- ☐ Antek
- ☐ April
- ☐ AWD
- ☐ Basecamp (1)
- ☐ C2 Education

☒ Apply view to subfolders

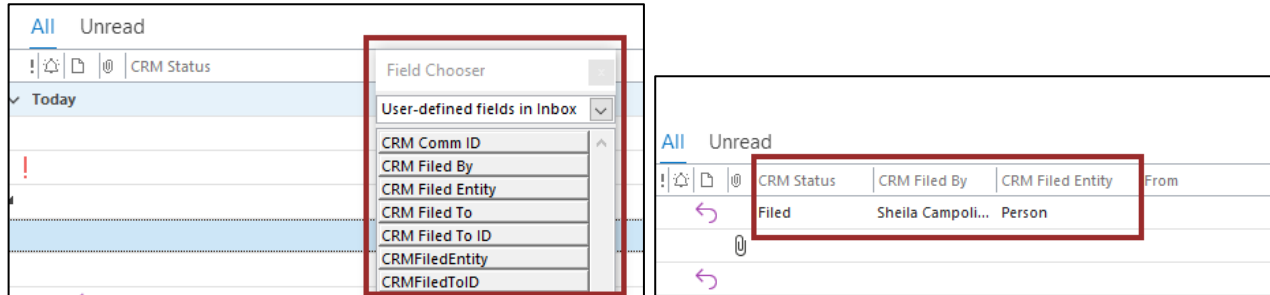
Number of folders to apply the view to: 1

sheila.campolieto@mycrmmanager.com

OK Cancel Clear All

If you later create a new folder, you can apply your new view to by selecting the new folder and completing steps n, o, and p from above.

Additional information about filed emails available in Outlook (hover over the columns then right click -> Field Chooser -> user-defined fields in Inbox -> scroll and select)



## Contact Us

Please contact your Project Manager if you have questions as you begin utilizing the integration. Be sure to include details and a screen shot of the question/issue so we can quickly investigate a resolution.

[dan.cousins@mycrmmanager.com](mailto:dan.cousins@mycrmmanager.com) | [april.braun@mycrmmanager.com](mailto:april.braun@mycrmmanager.com) | [sheila.campolieto@mycrmmanager.com](mailto:sheila.campolieto@mycrmmanager.com)