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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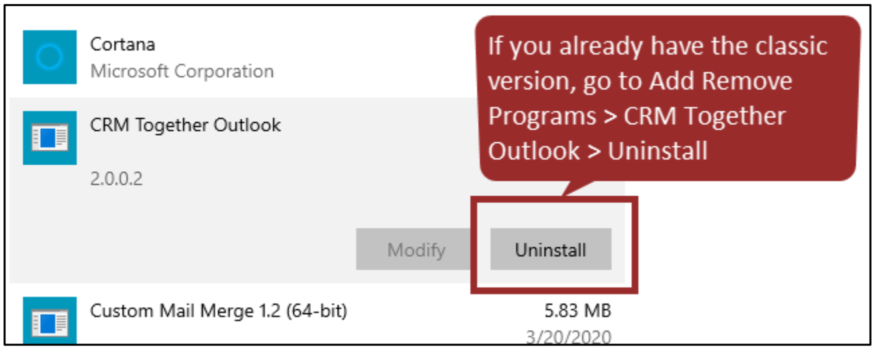
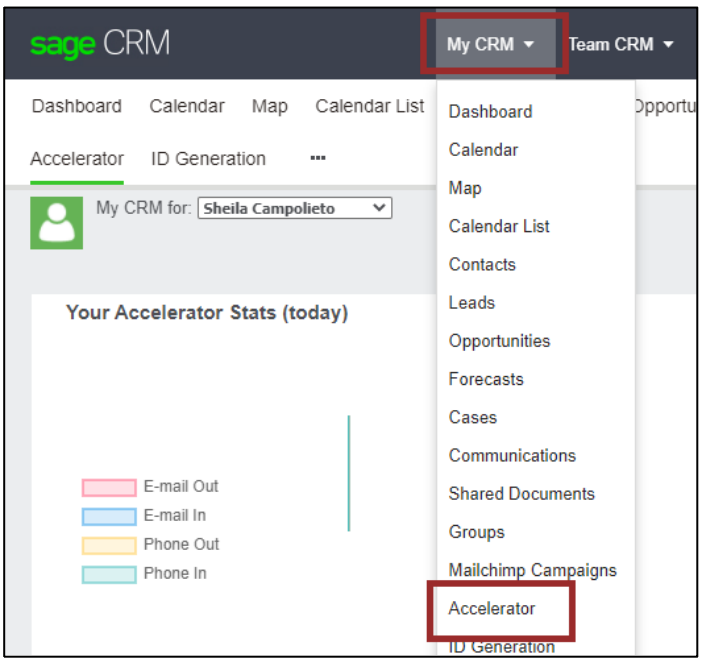
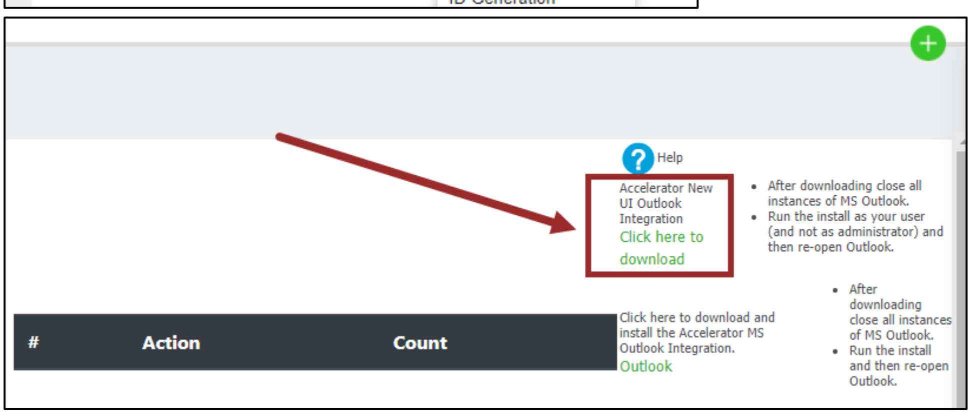
Install Accelerator

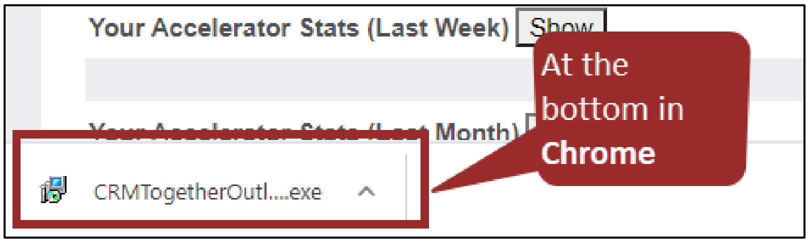
1. If you already have a version of Accelerator, first uninstall the existing version under Add or Remove Programs

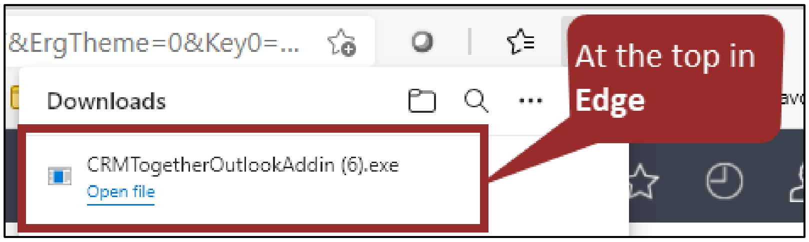


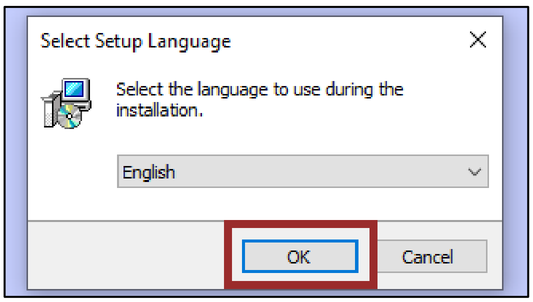
2. Close Outlook
3. Log into Sage CRM and click My CRM –> Accelerator
4. Scroll down and select **Click here to download**, then follow the instructions to install the program

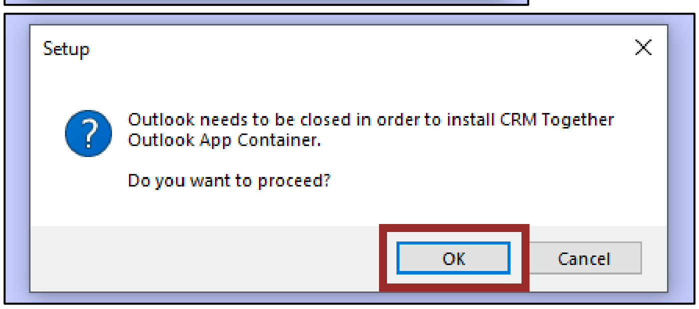


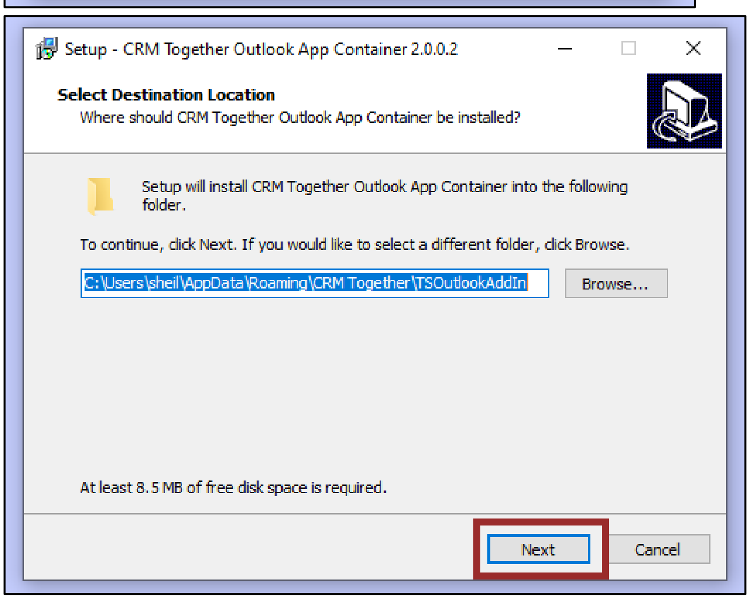



Your Accelerator Stats (Last Week) Show
At the bottom in Chrome
CRMTogetherOutl....exe


&ErgTheme=0&Key0=...
Downloads
At the top in Edge
CRMTogetherOutlookAddin (6).exe
Open file


Select Setup Language
Select the language to use during the installation.
English
OK
Cancel


Setup
Outlook needs to be closed in order to install CRM Together Outlook App Container.
Do you want to proceed?
OK
Cancel


Setup - CRM Together Outlook App Container 2.0.0.2
Select Destination Location
Where should CRM Together Outlook App Container be installed?
Setup will install CRM Together Outlook App Container into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Users\sheil\AppData\Roaming\CRM Together\TSOutlookAddIn
Browse...
At least 8.5 MB of free disk space is required.
Next
Cancel

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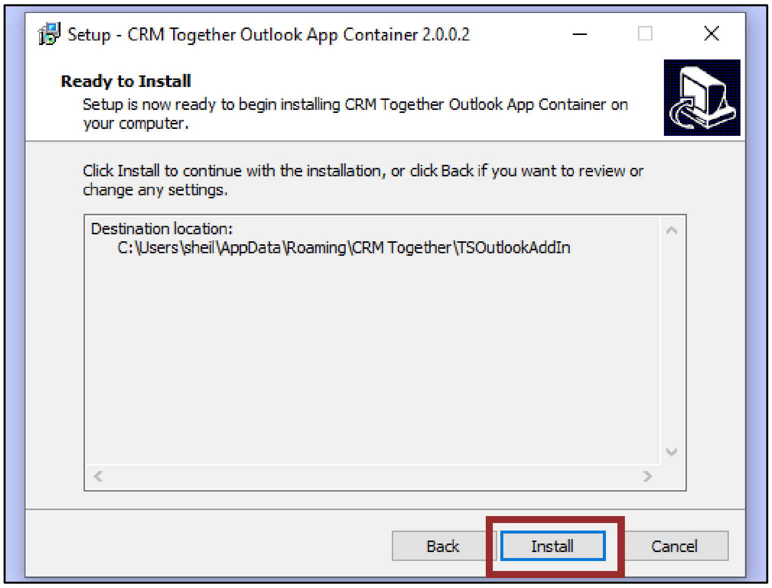
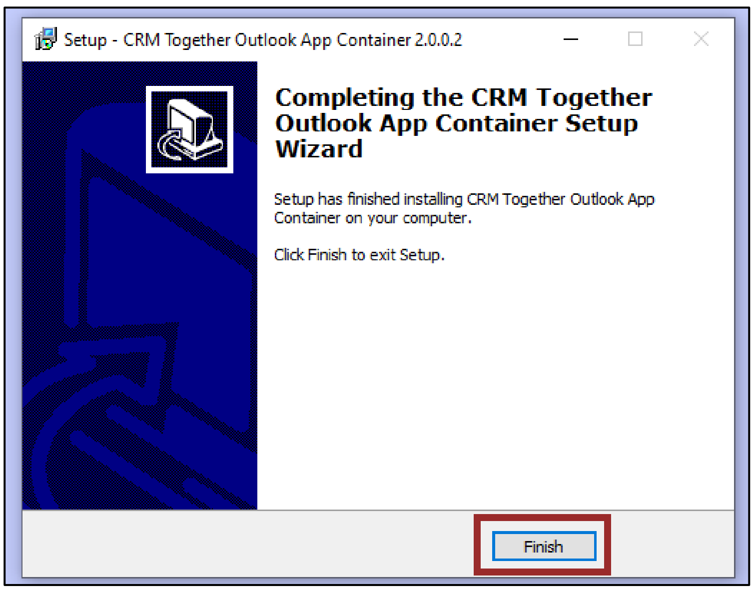
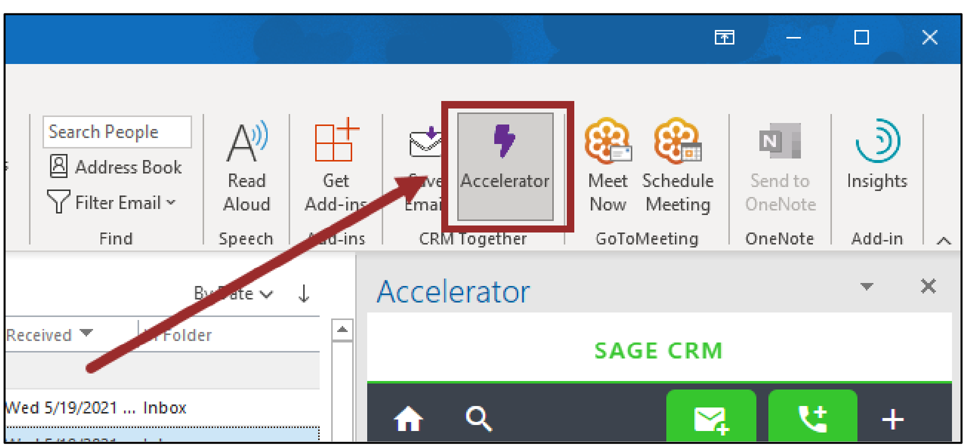




5. Once the installation is finished, open Outlook and find the Accelerator icon in the top right corner of the Home tab to open the Accelerator pane (this icon also closes the Accelerator pane)



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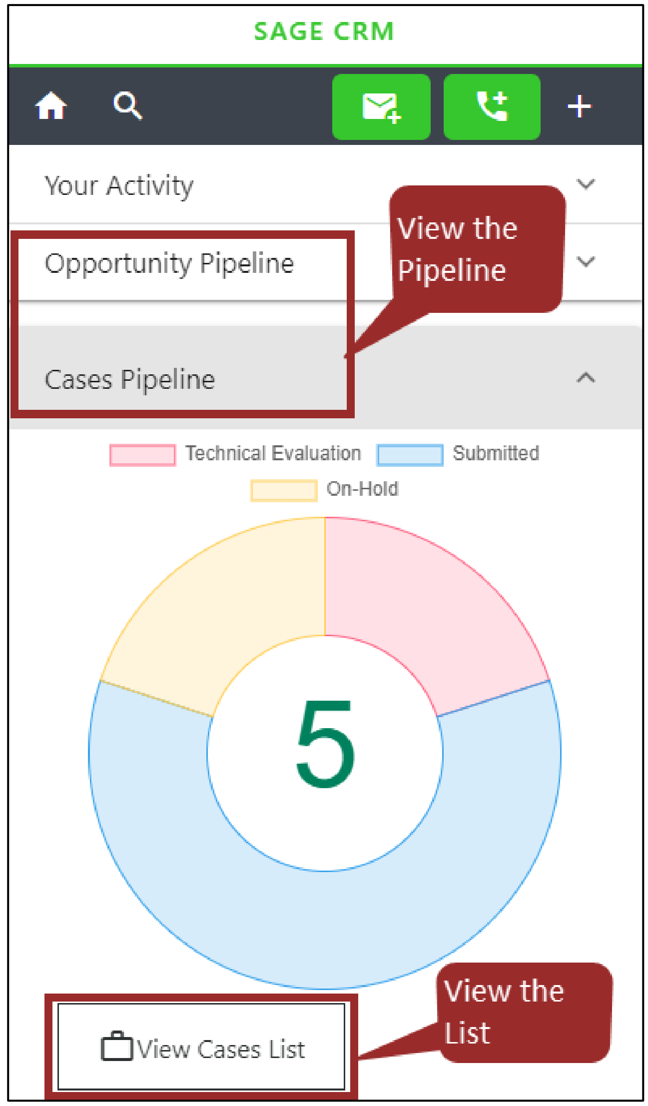
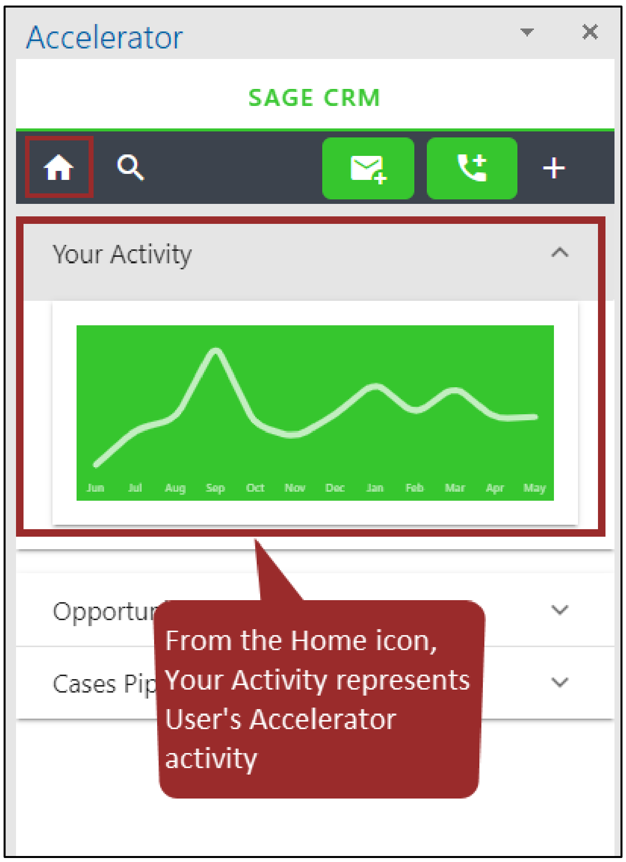
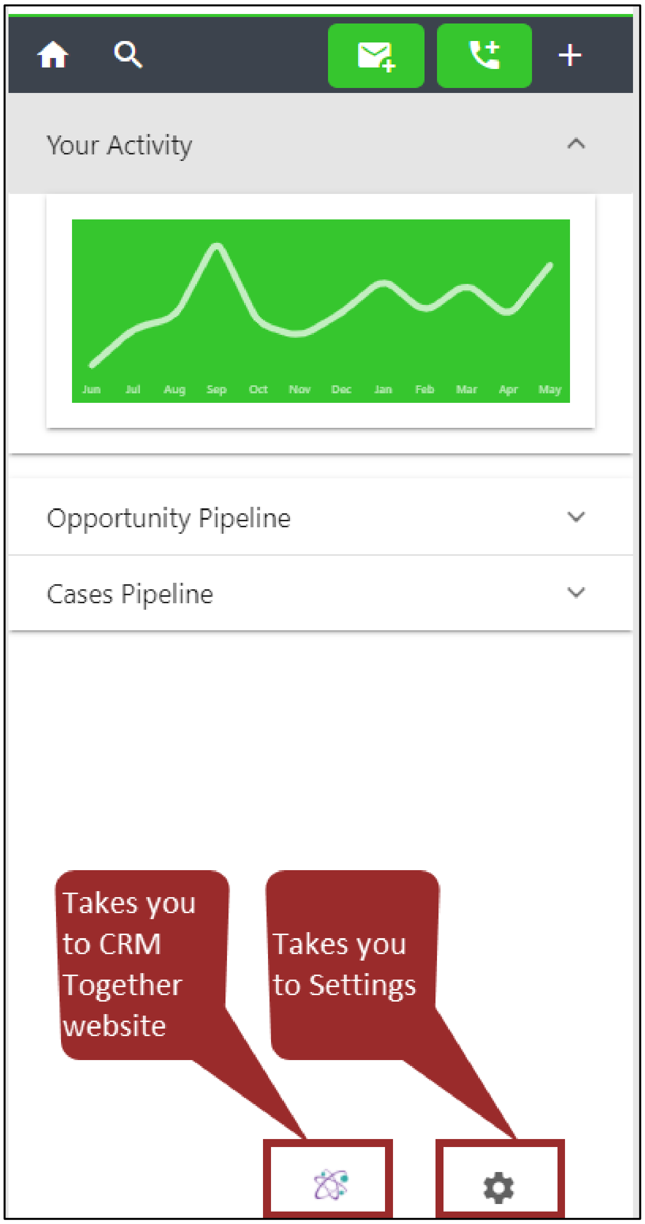
Home Page & Settings

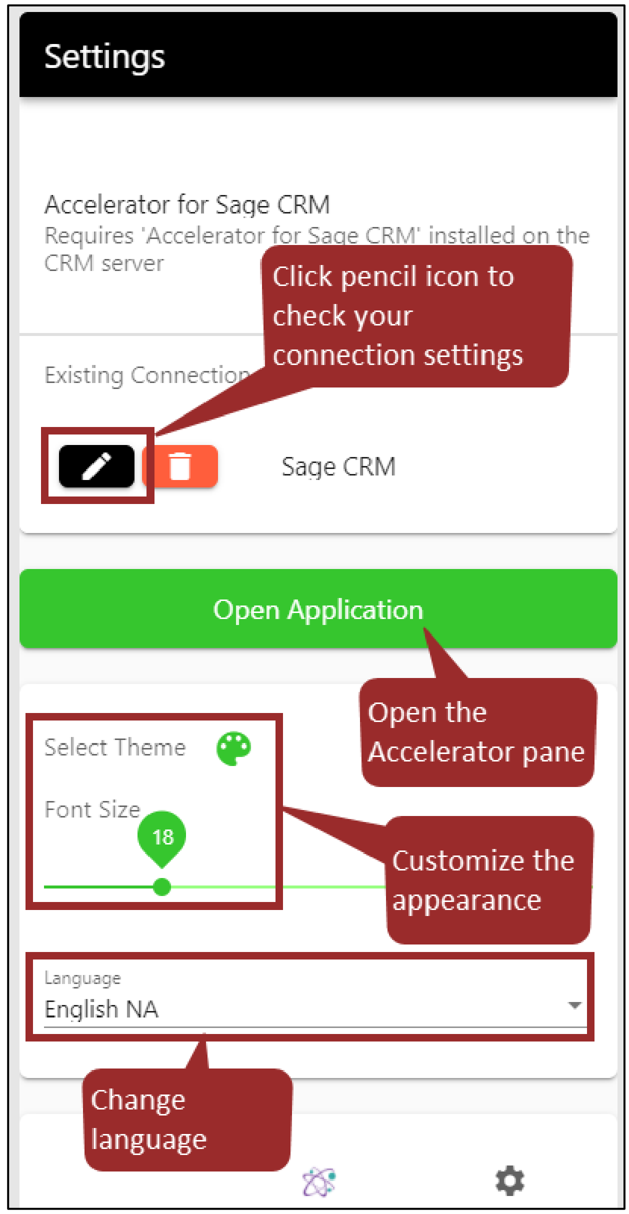
1. Home page gives you a quick glimpse into your Accelerator Activity, Case, and Opportunity Pipeline





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

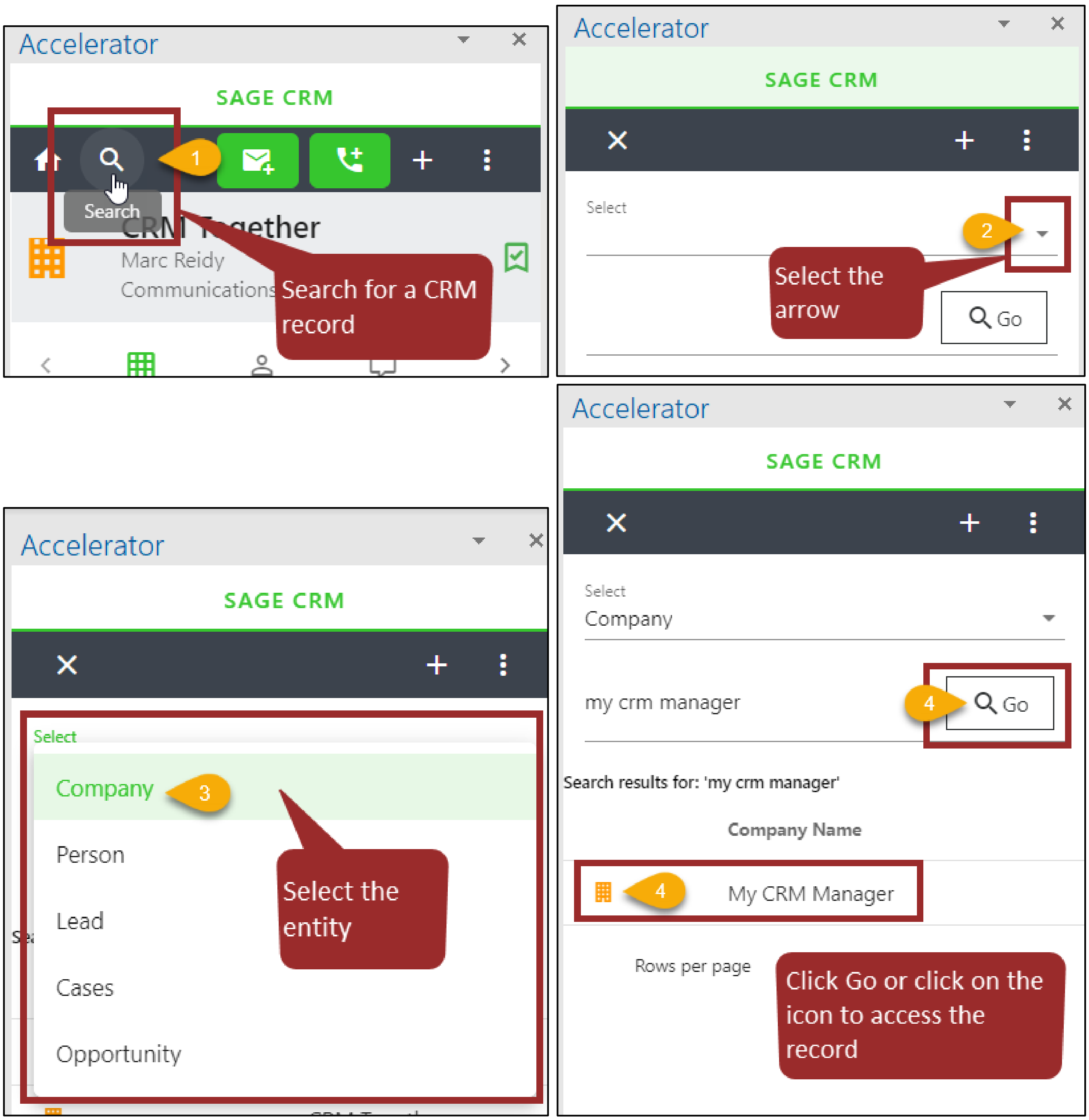




Accelerator Menu Buttons

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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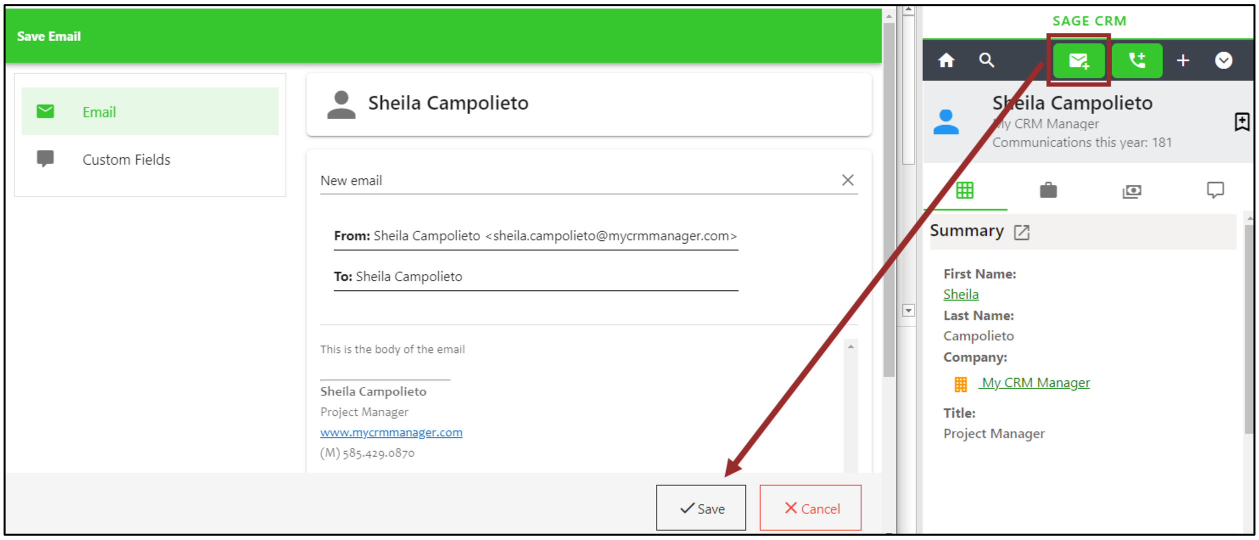
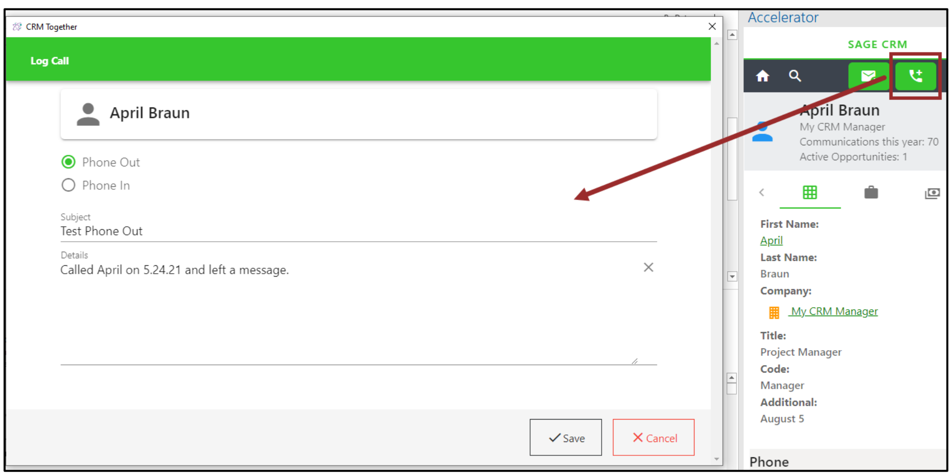
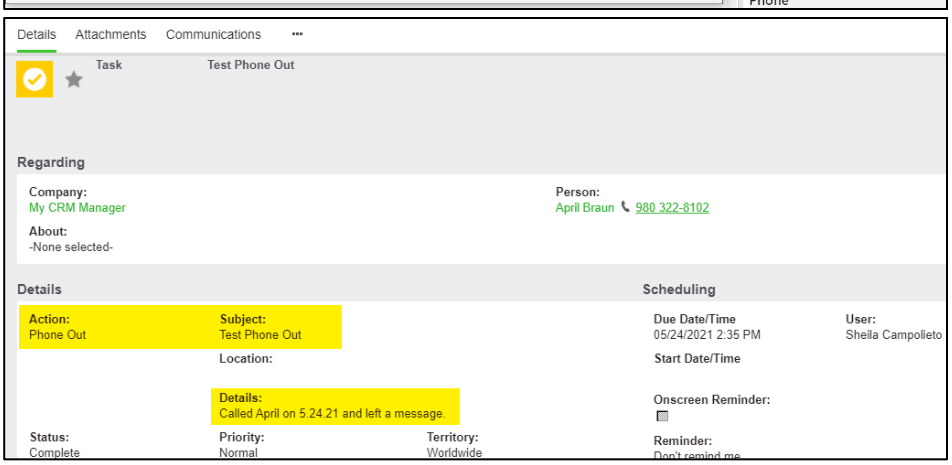
b. From the record you can save an email, log a phone call, see the CRM lists, or choose additional options

i. Saving an email saves it as a Communication 'Email In' against the current record (see Saving Emails under Incoming Emails for more details)



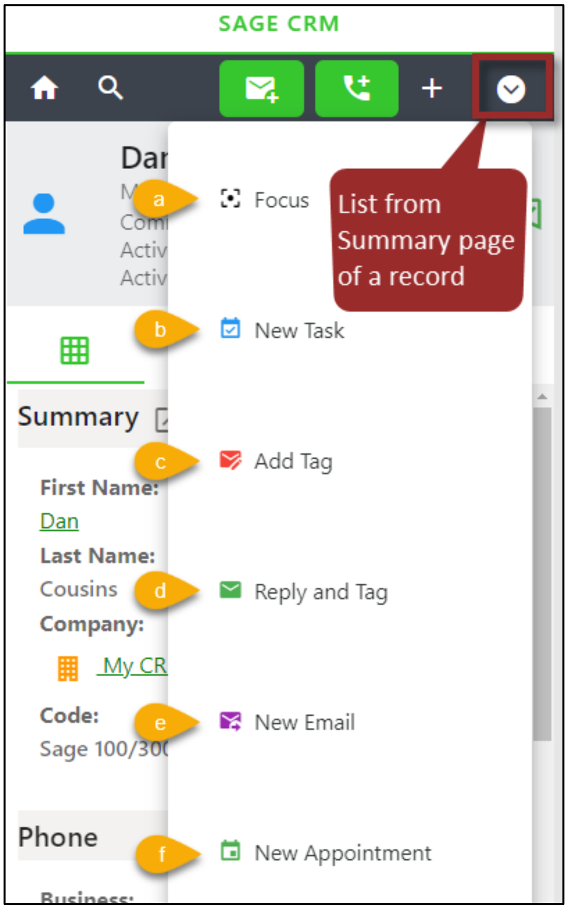
ii. The phone icon allows you to enter a call and save it as a Communication record against the current record by selecting Phone Out or Phone In, filling in the details of the call, then clicking Save





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)



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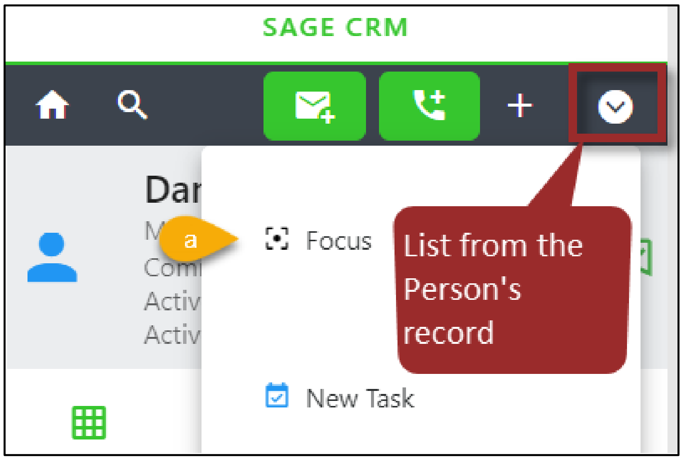
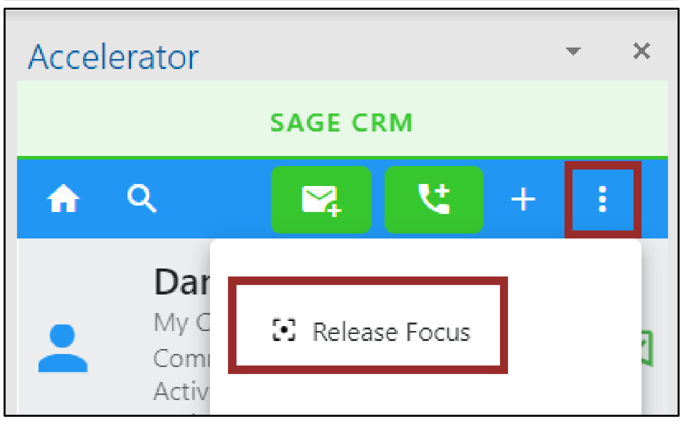
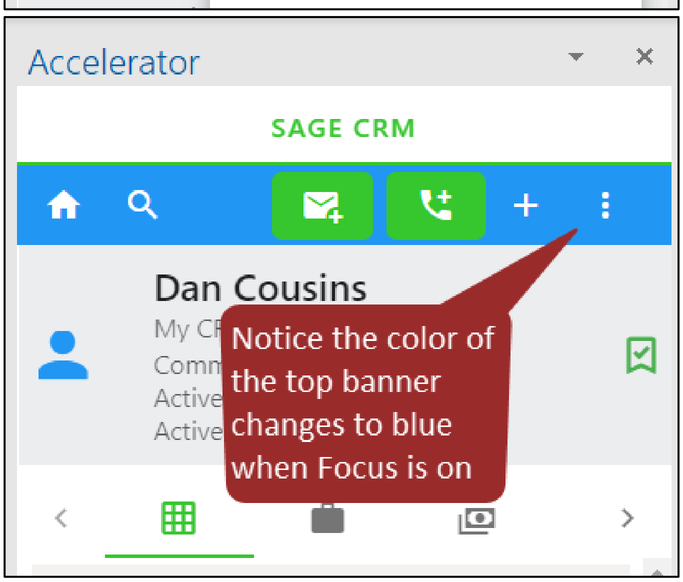
a. Focus

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.**







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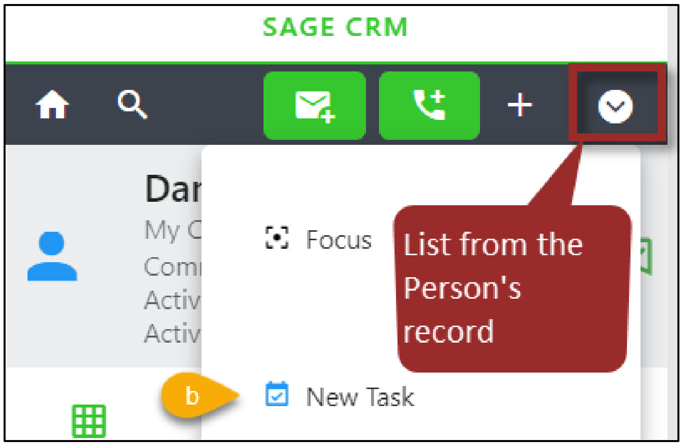
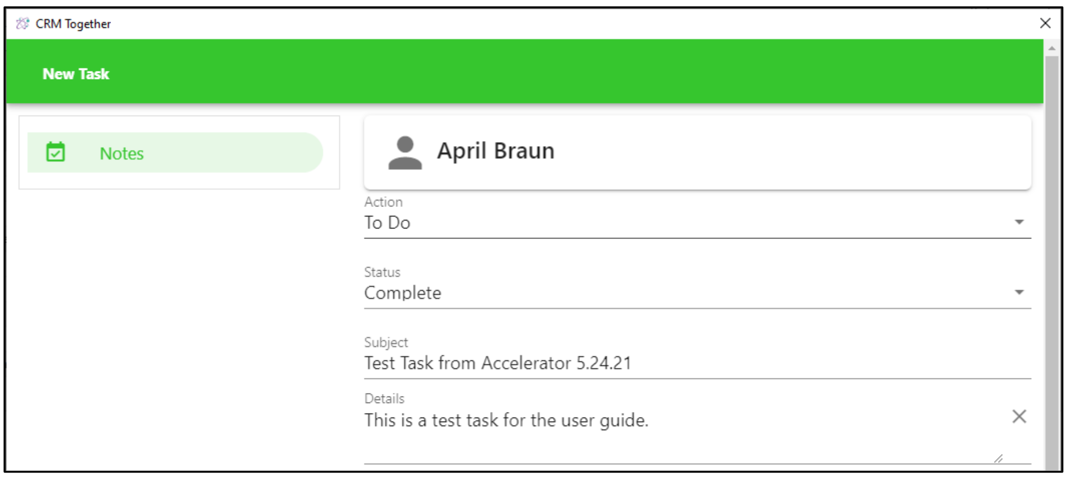
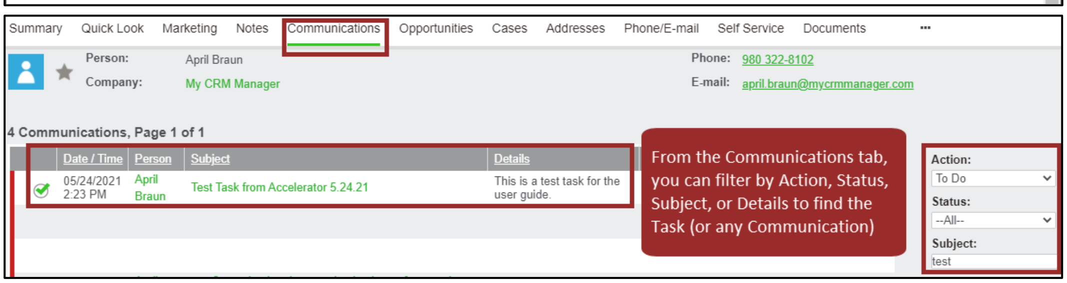
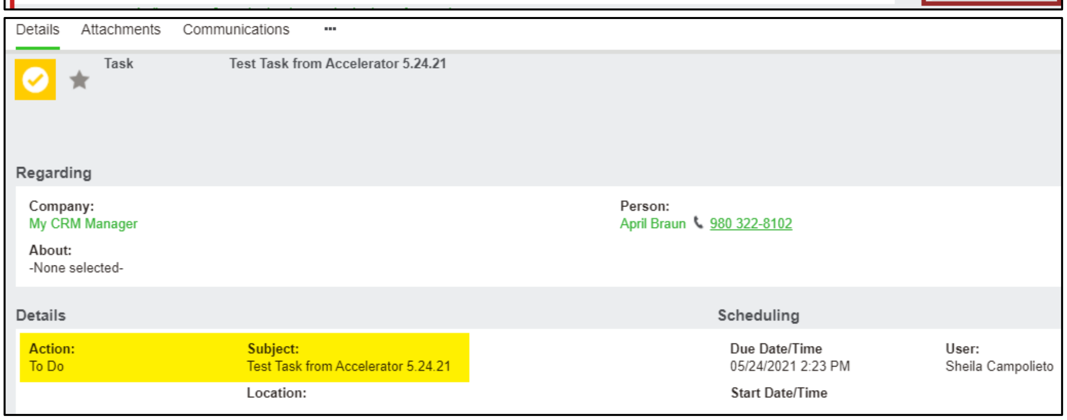
b. New Task

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









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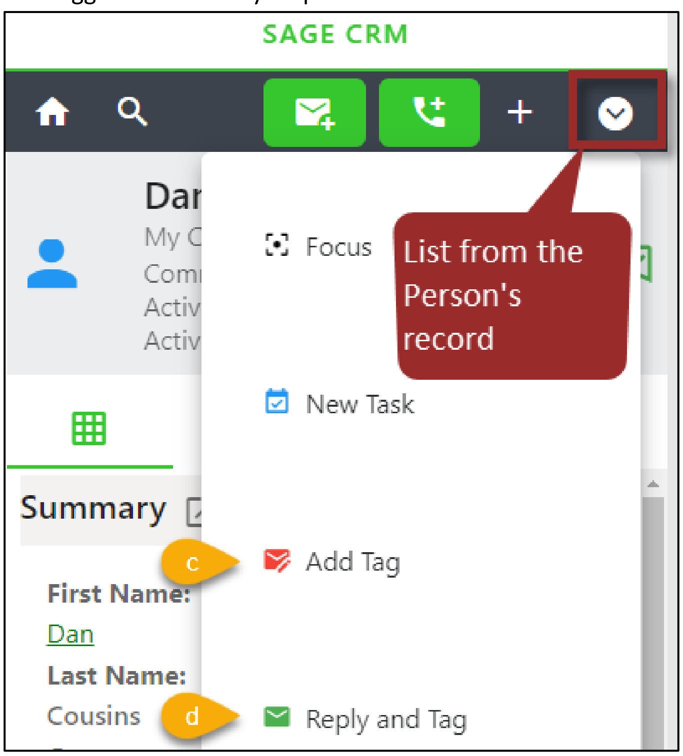
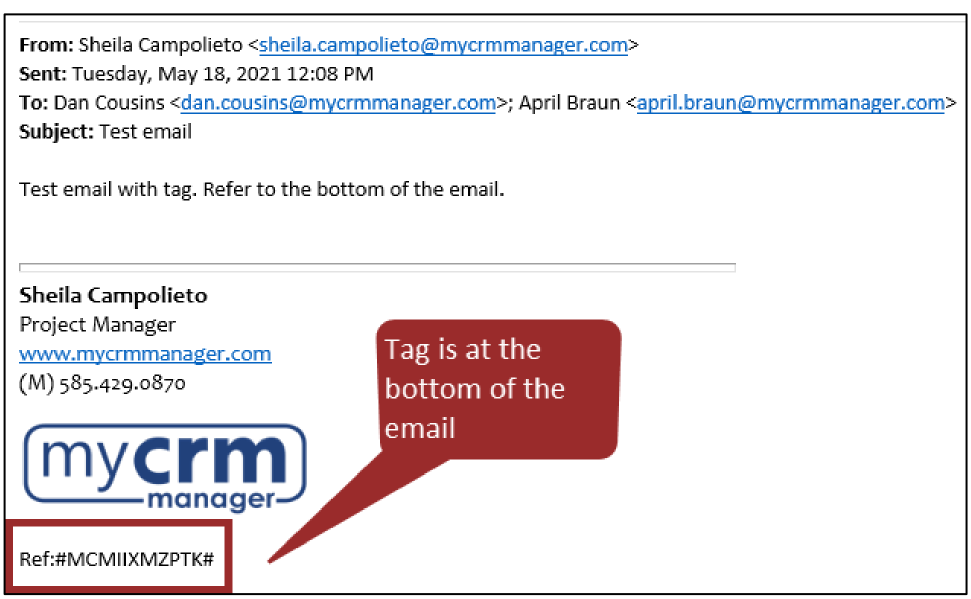
c. Add Tag

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





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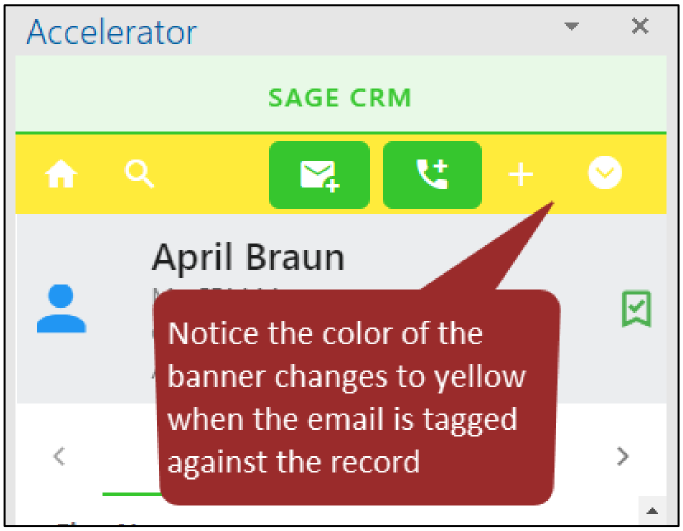

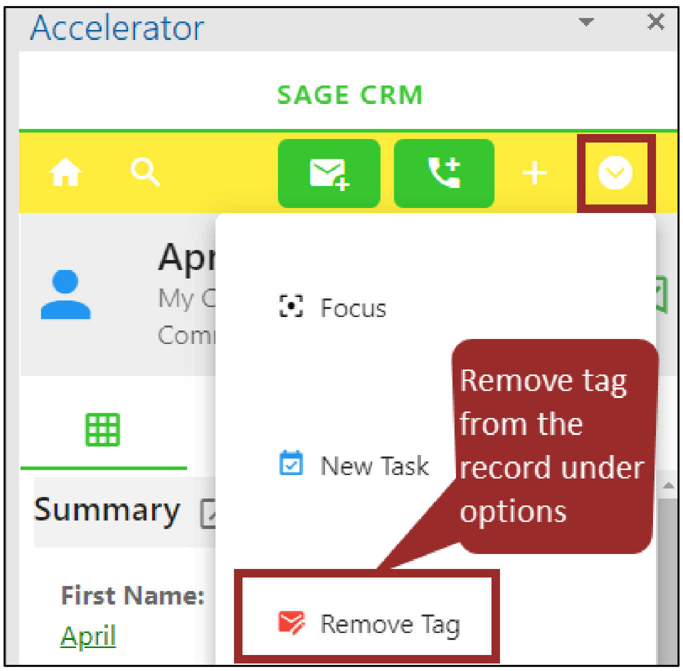

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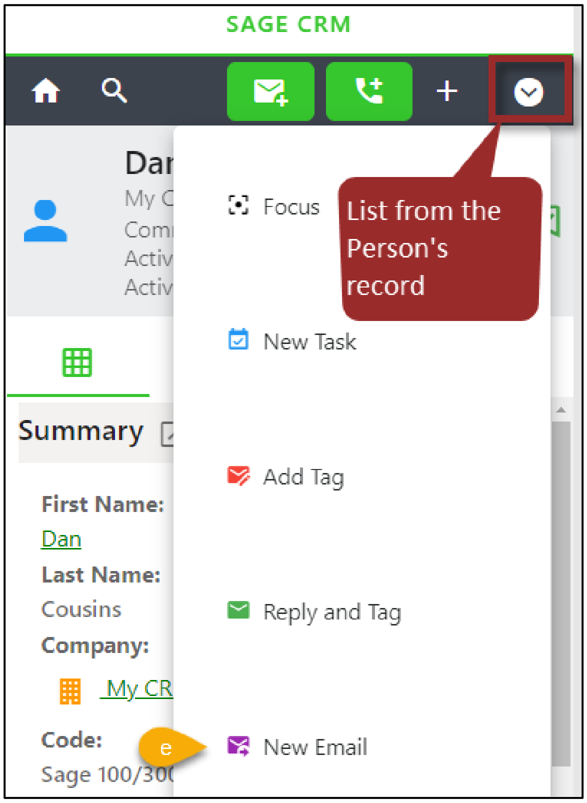
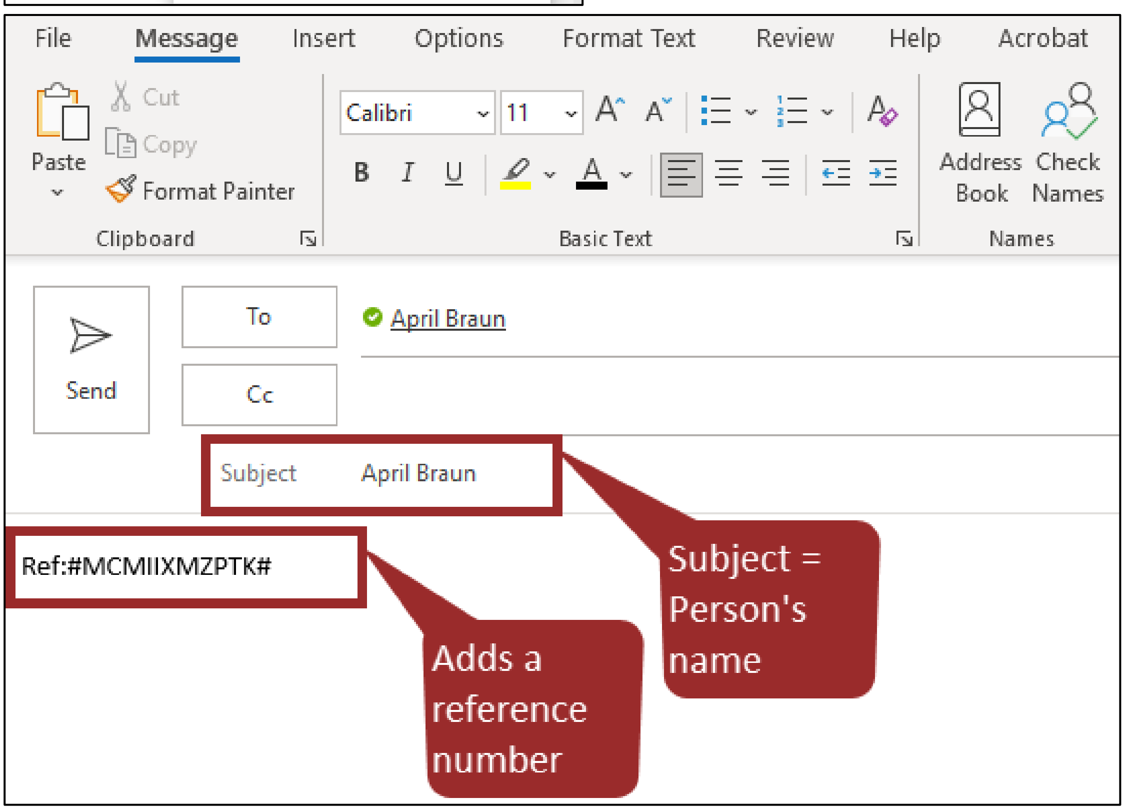
e. New Email

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





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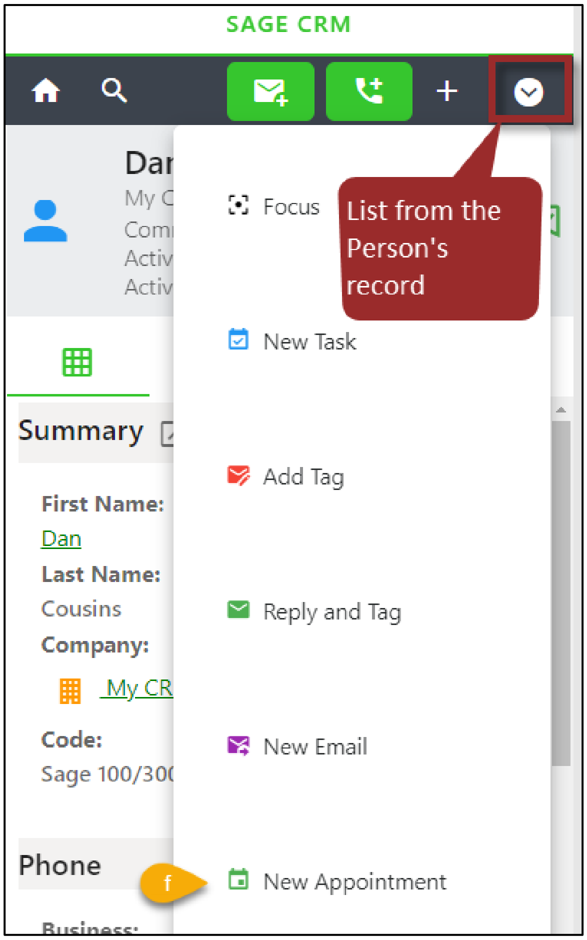
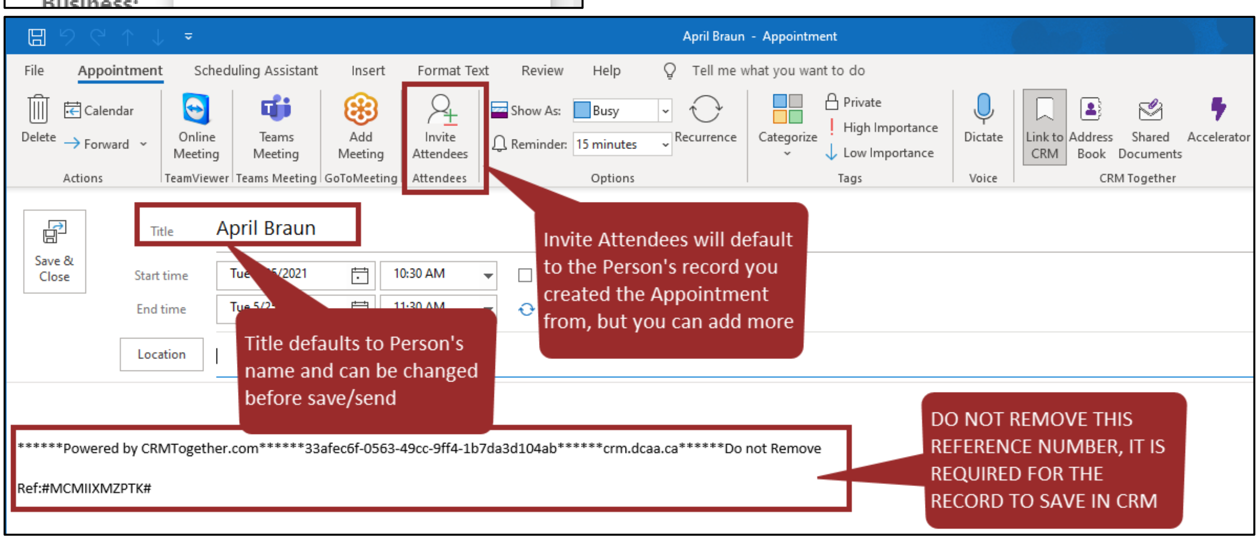
f. New Appointment

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





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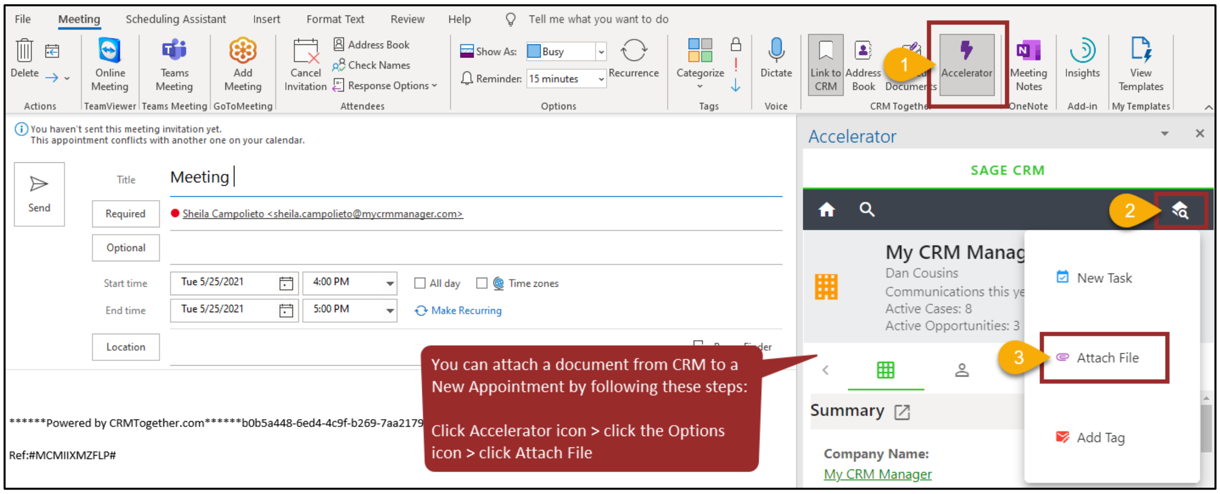
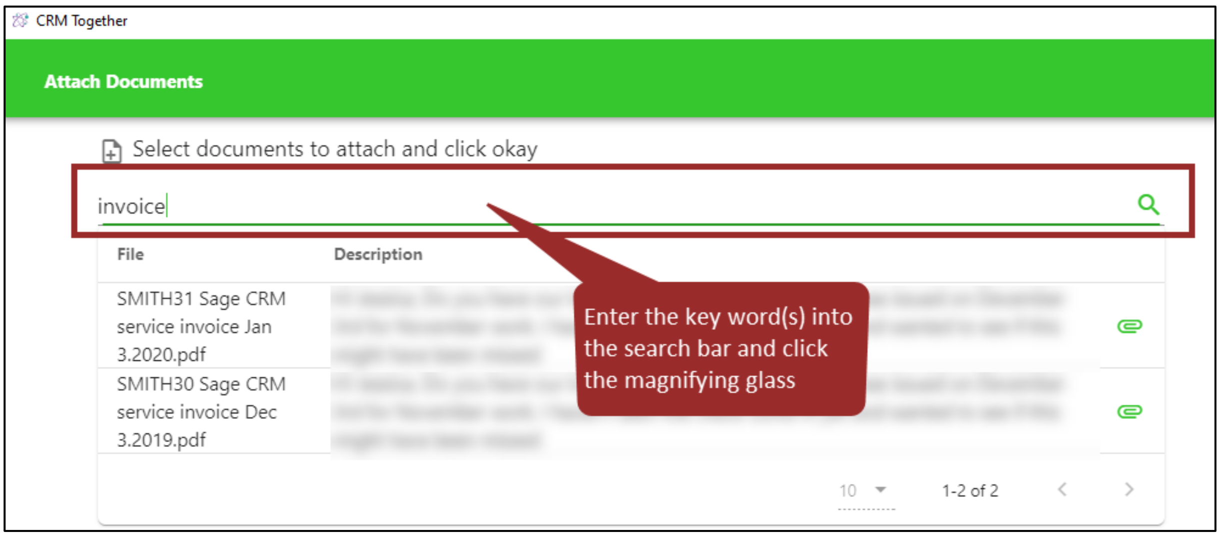
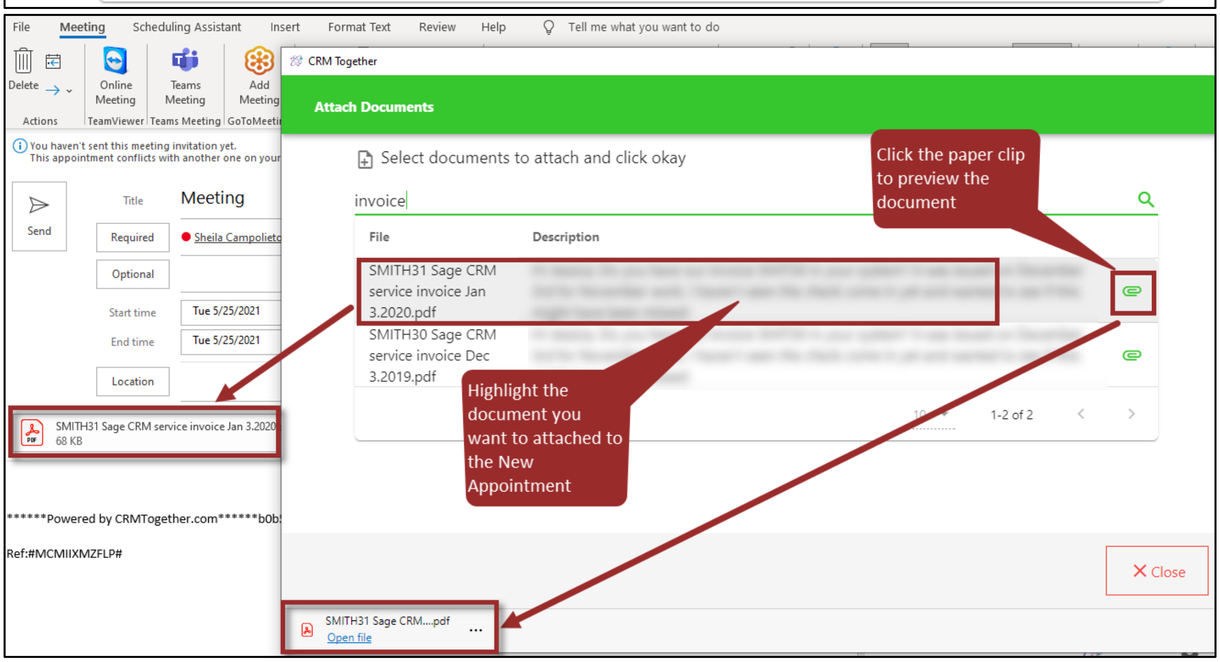
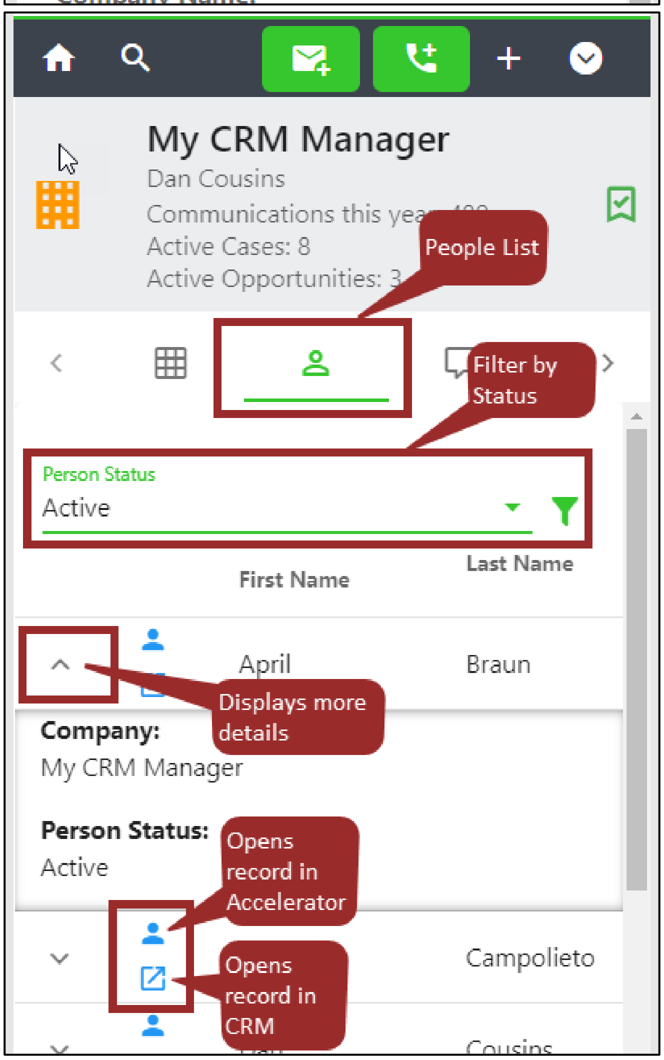




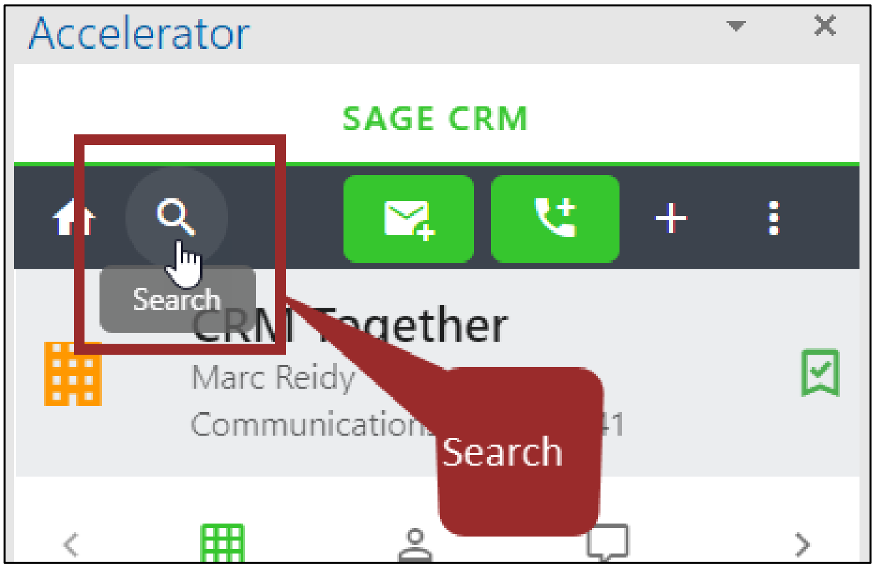


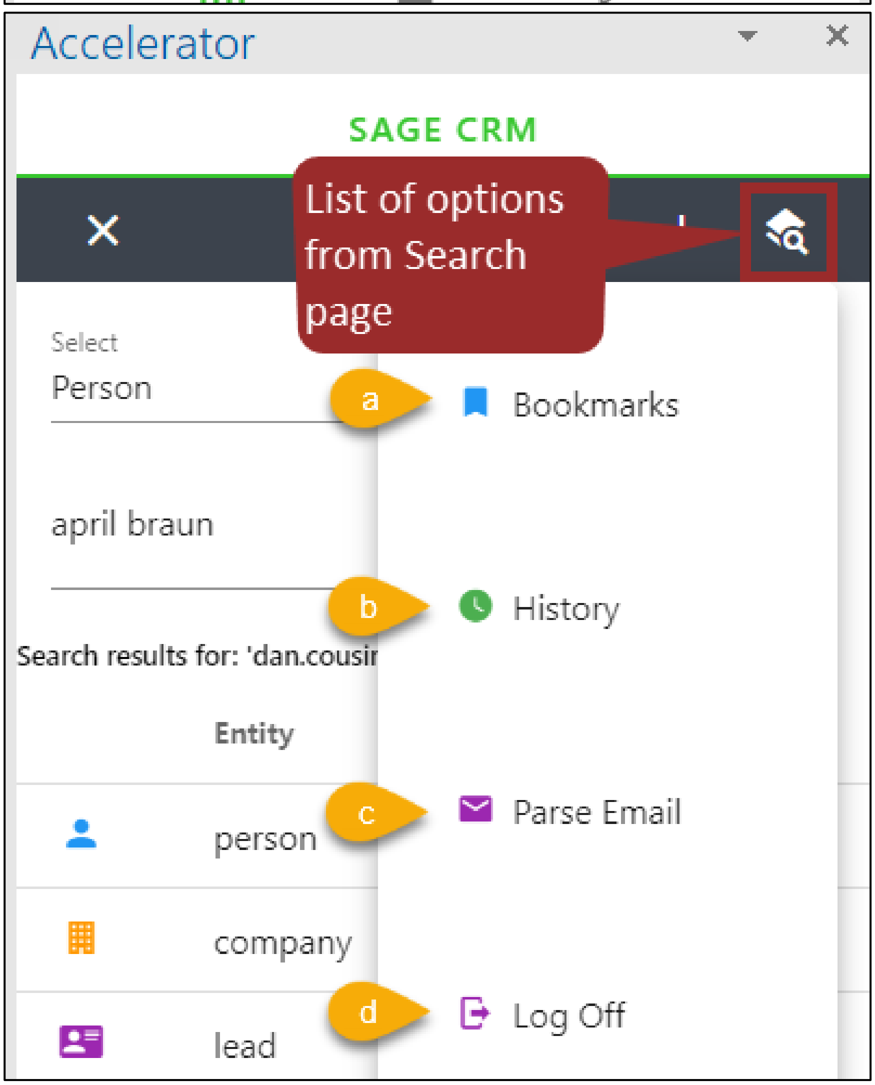
3. The Accelerator Icons

   The Accelerator icons display the CRM lists under the selected record. For example, you can see the list of People, Communications, or Cases under a Company record.



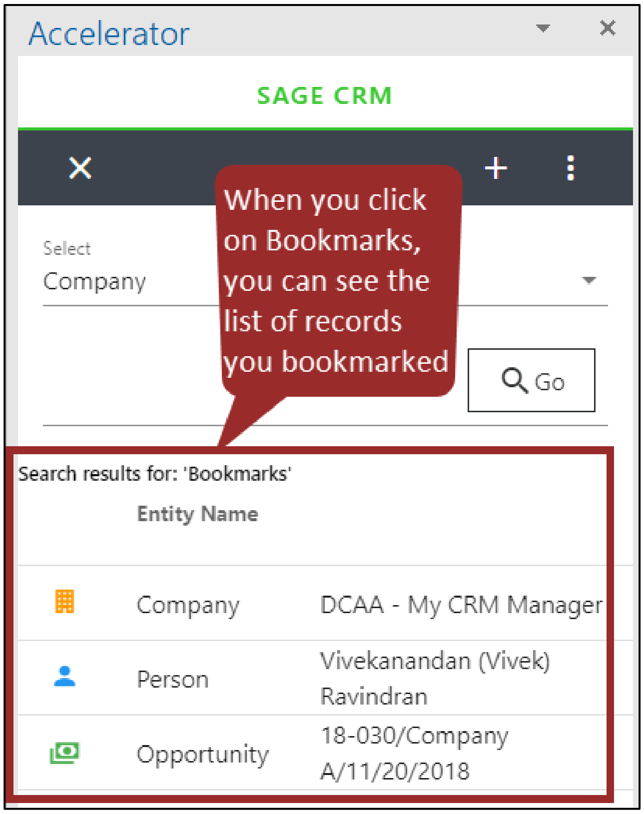
4. Additional Search Options

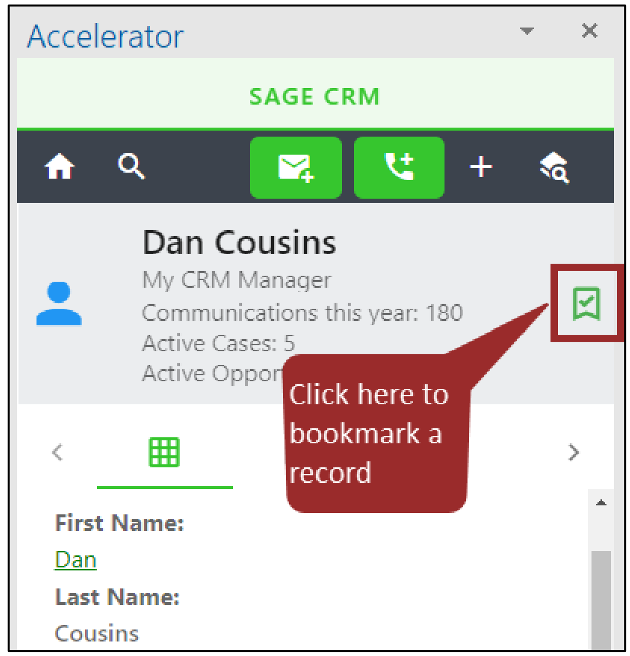




a. Bookmarks

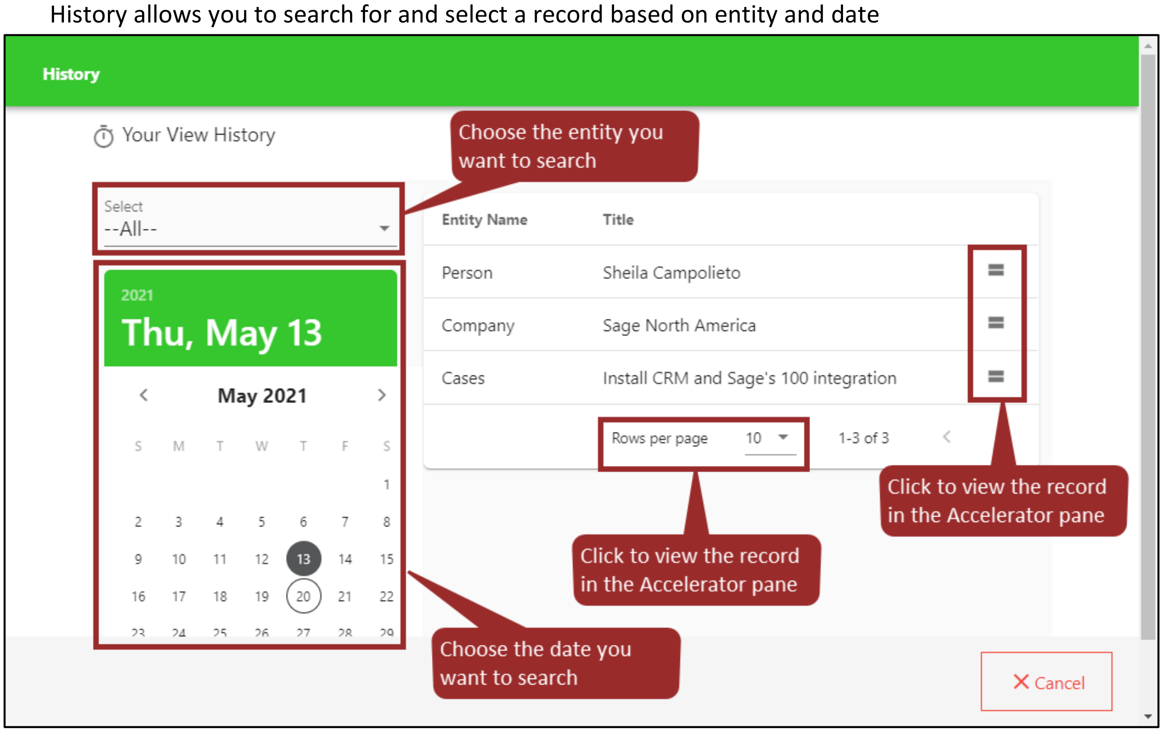
Bookmarks list all the records that have been bookmarked





b. History

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



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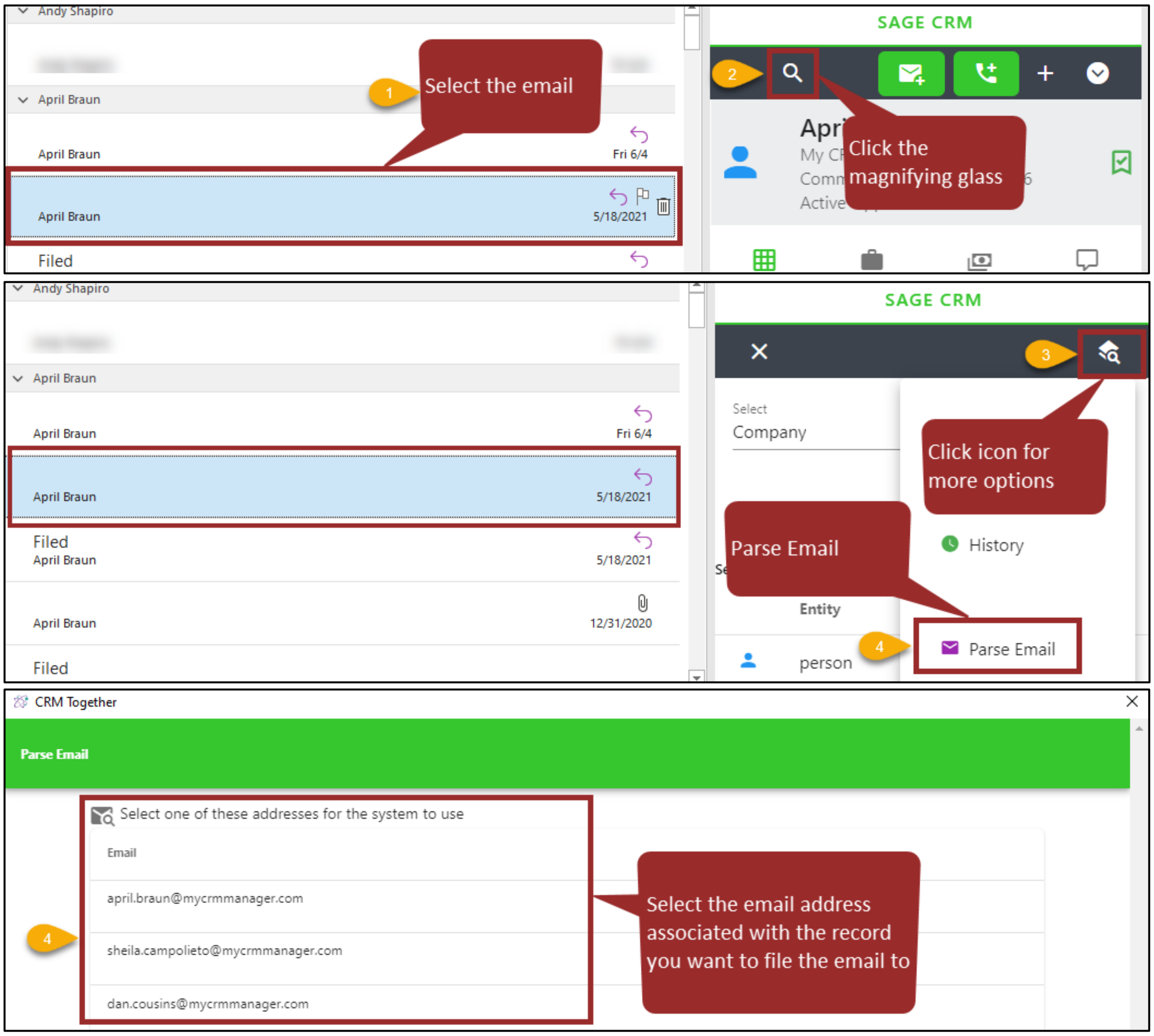
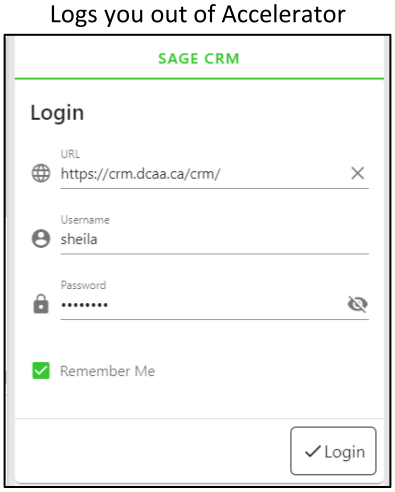
c. Parse Search

Parse Search searches all email addresses associated with the selected email



d. Log Off

Logs you out of Accelerator



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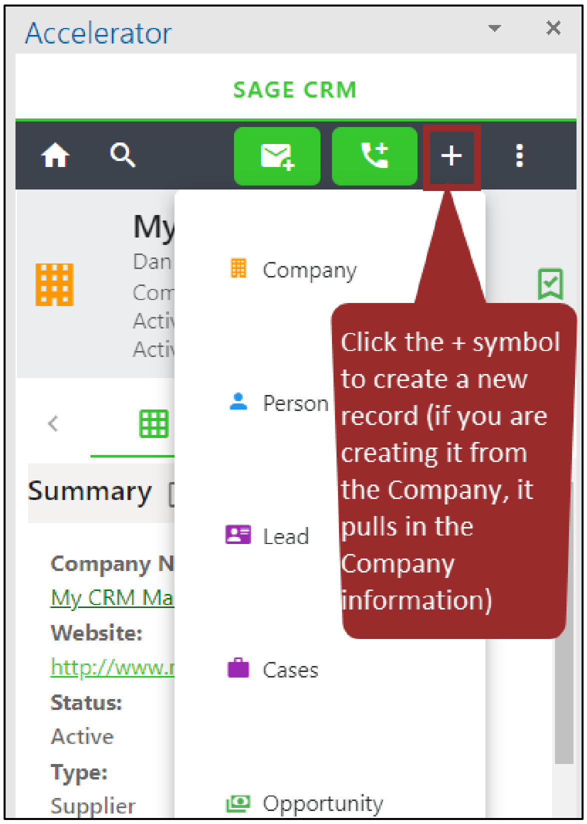
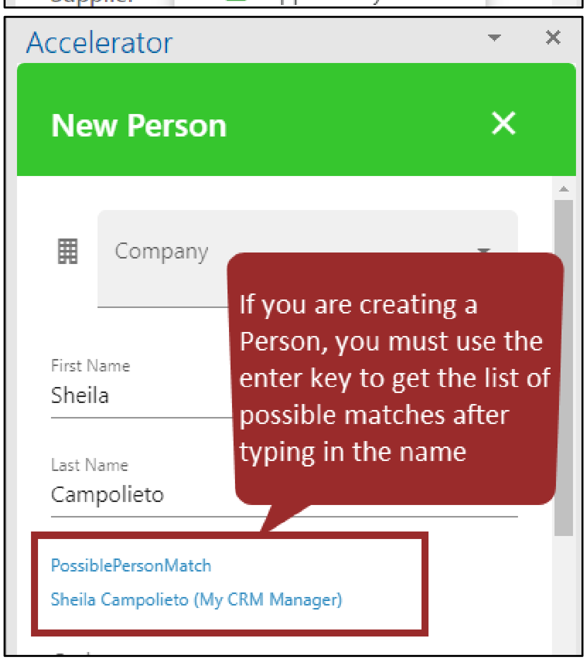
5. Create New Records

   a. 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)

   b. You can also create a new Company, regardless of the email you have highlighted, and remove all of the pre-populated informaiton





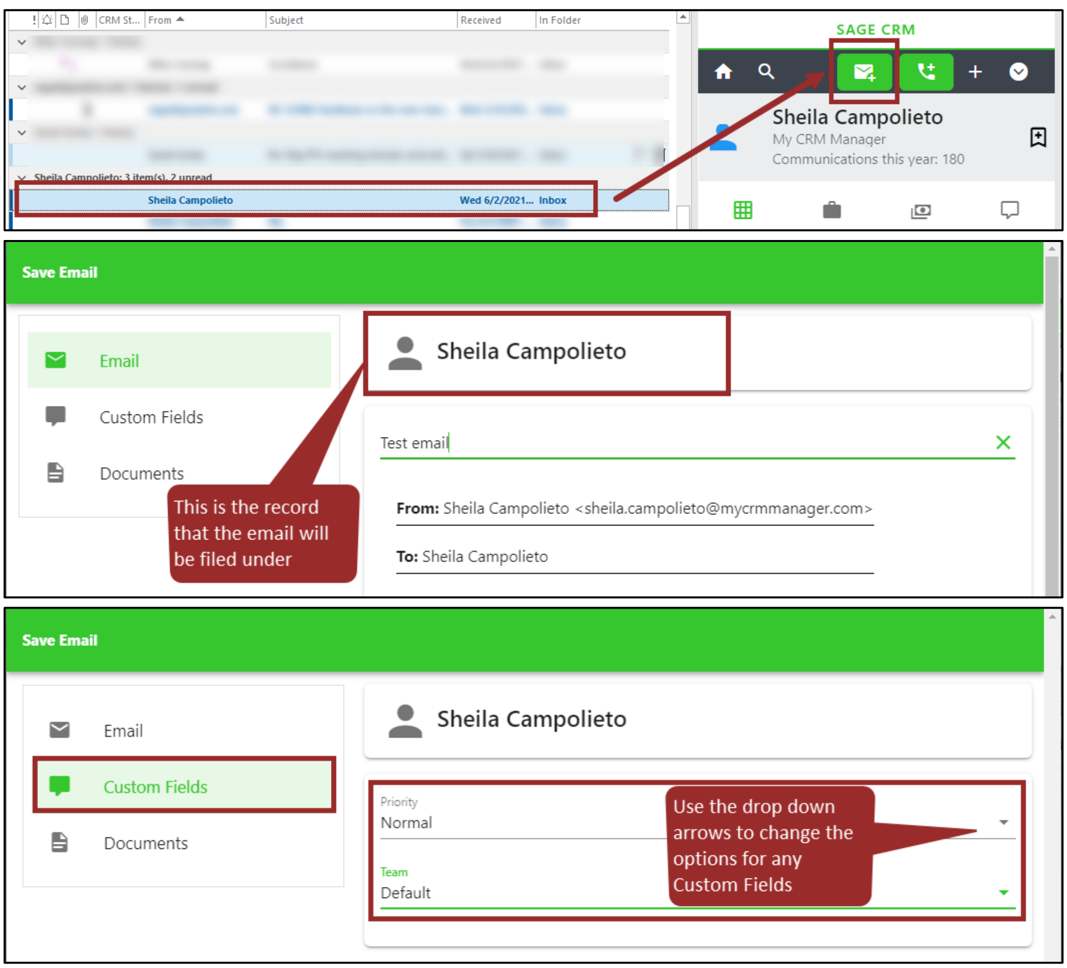
Incoming Emails

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:

   a. Tag – checks for a tag and if there is, searches CRM based on the tag
   b. Person Email – checks for a Person record with a matching email address
   c. Company Email – checks for a Company record with matching domain
   d. Lead Email – checks for a Lead record with a matching email address
   e. 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
   a. From your Inbox, click on the email you want to file (do not open it)
   b. Confirm the record in the Accelerator Pane is correct
   c. Select Save Email button
      i. If you save to a Person, it also saves to the Company that the Person is under
      ii. If you save to a Company, Case, or Oppo, it also saves to a Person record that has an exact match to the email address in the 'From' field



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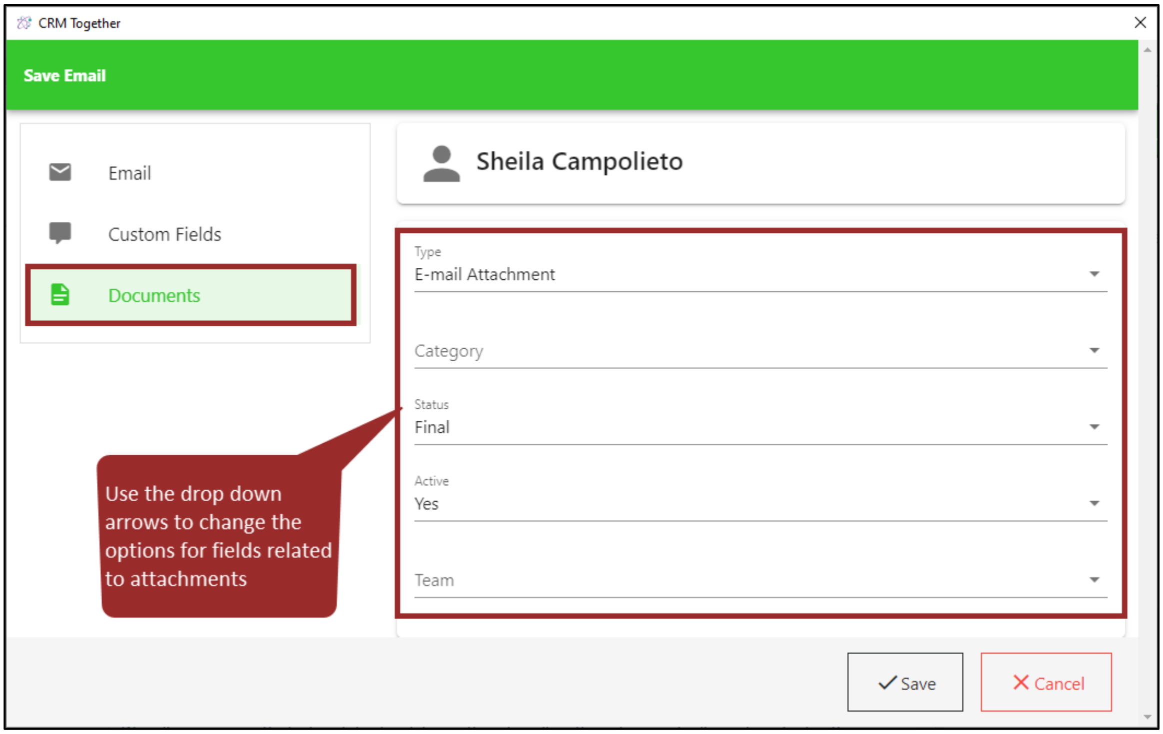
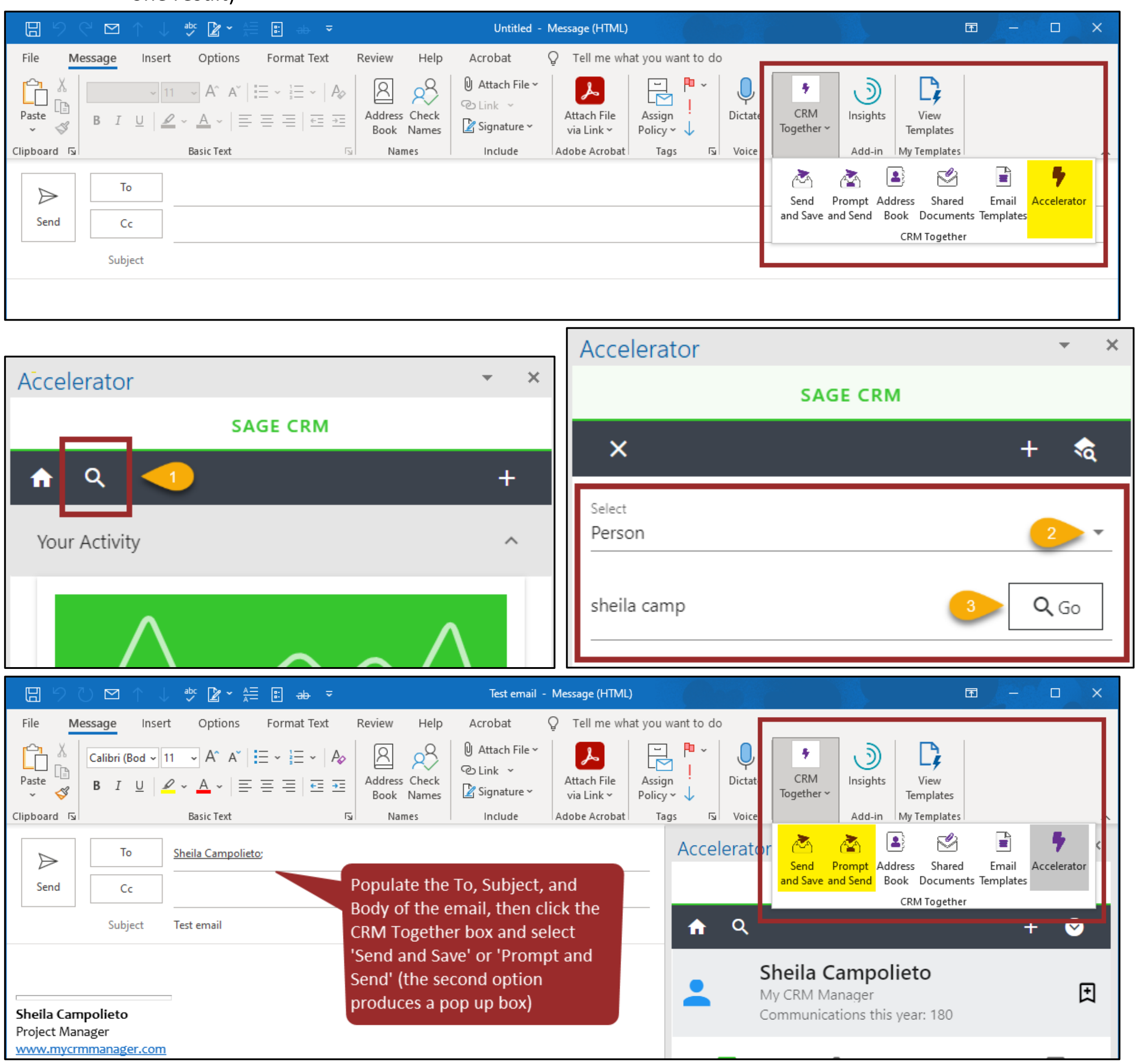
iii. Documents – allows you to specify the Communication record attributes (the fields displayed here can be customized to your CRM documents)



Outgoing Emails

1. New Email using the Accelerator pane
    a. 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
    b. 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

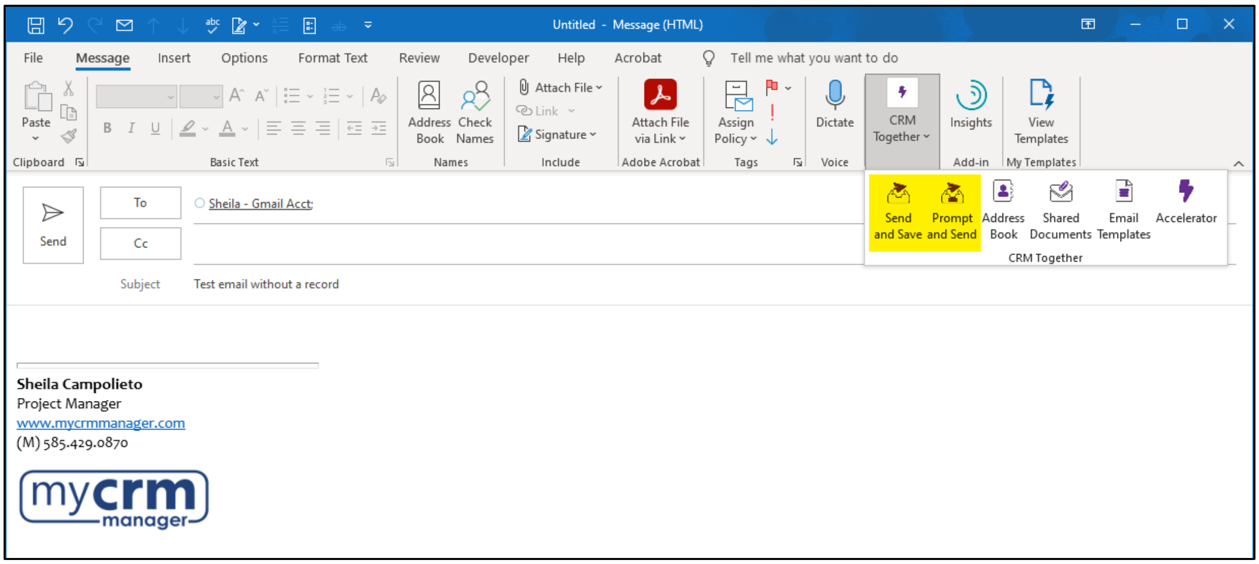
   You can use the Accelerator buttons from an email without opening the Accelerator pane

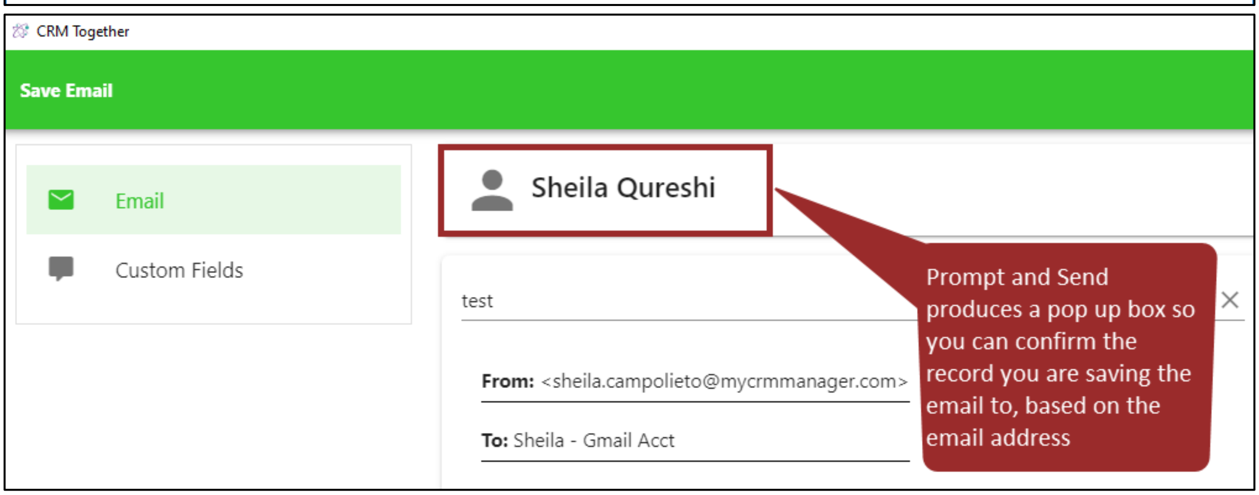
a. Send and File

   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)





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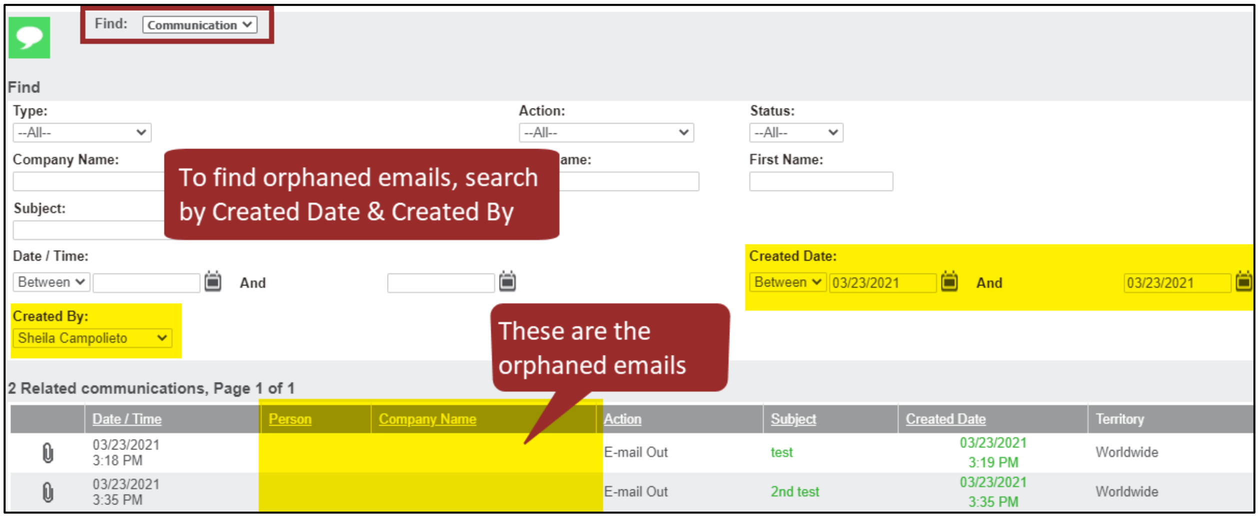
NOTE*: If there is no email address match in CRM, and you use Send and File, the email will not be filed to a specific record and there will be no 'warning' message letting you know. The email will instead be saved as an orphaned email (i.e. not saved under any Company or Person).*

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



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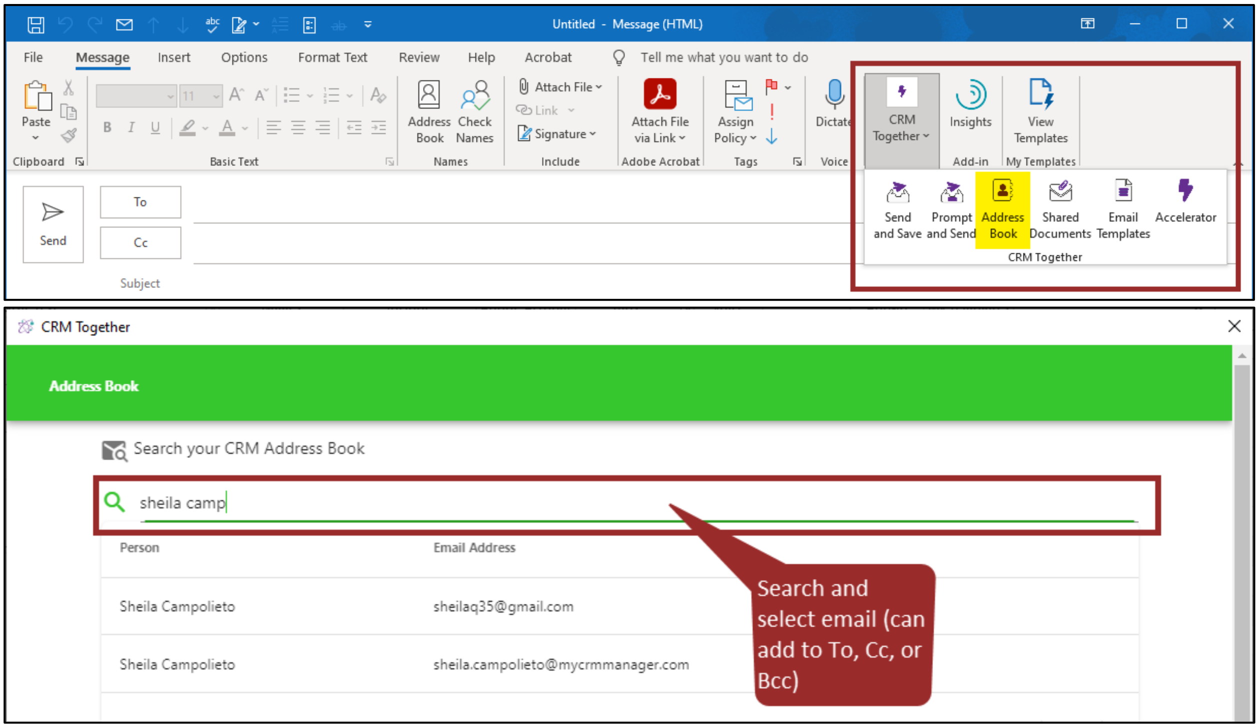
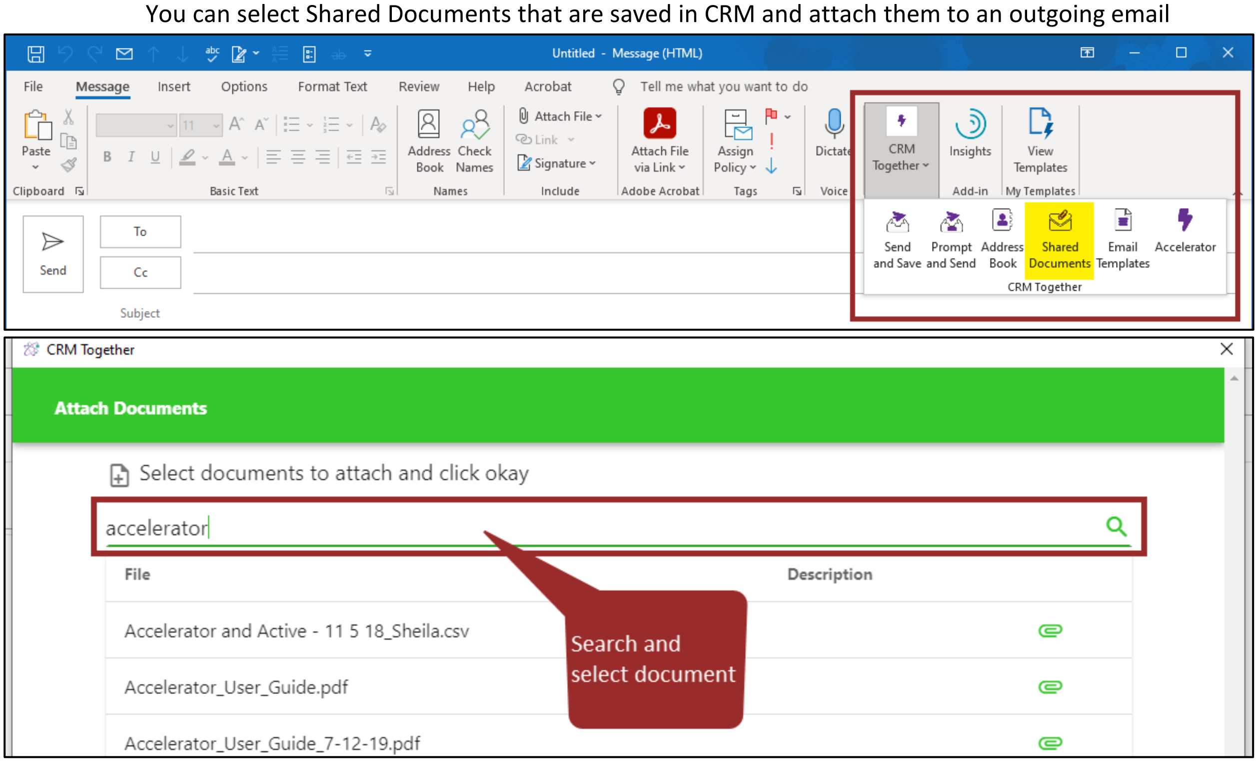
c. Address Book

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



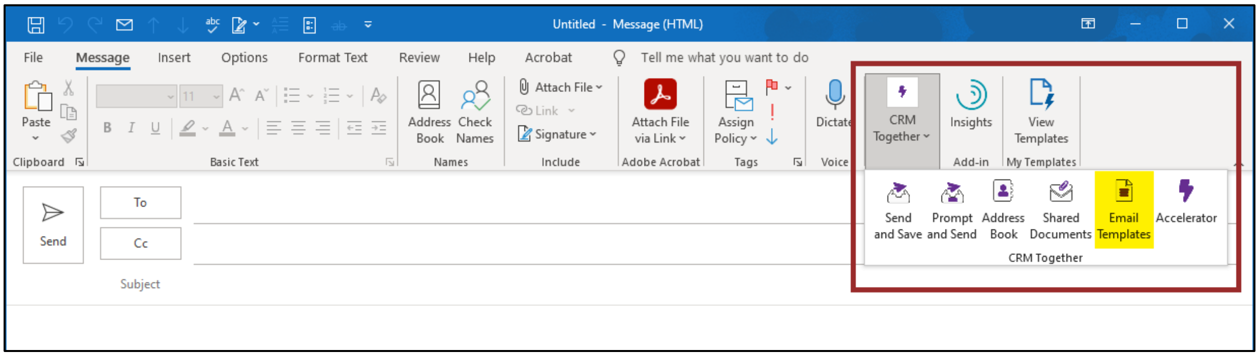
d. Shared Documents

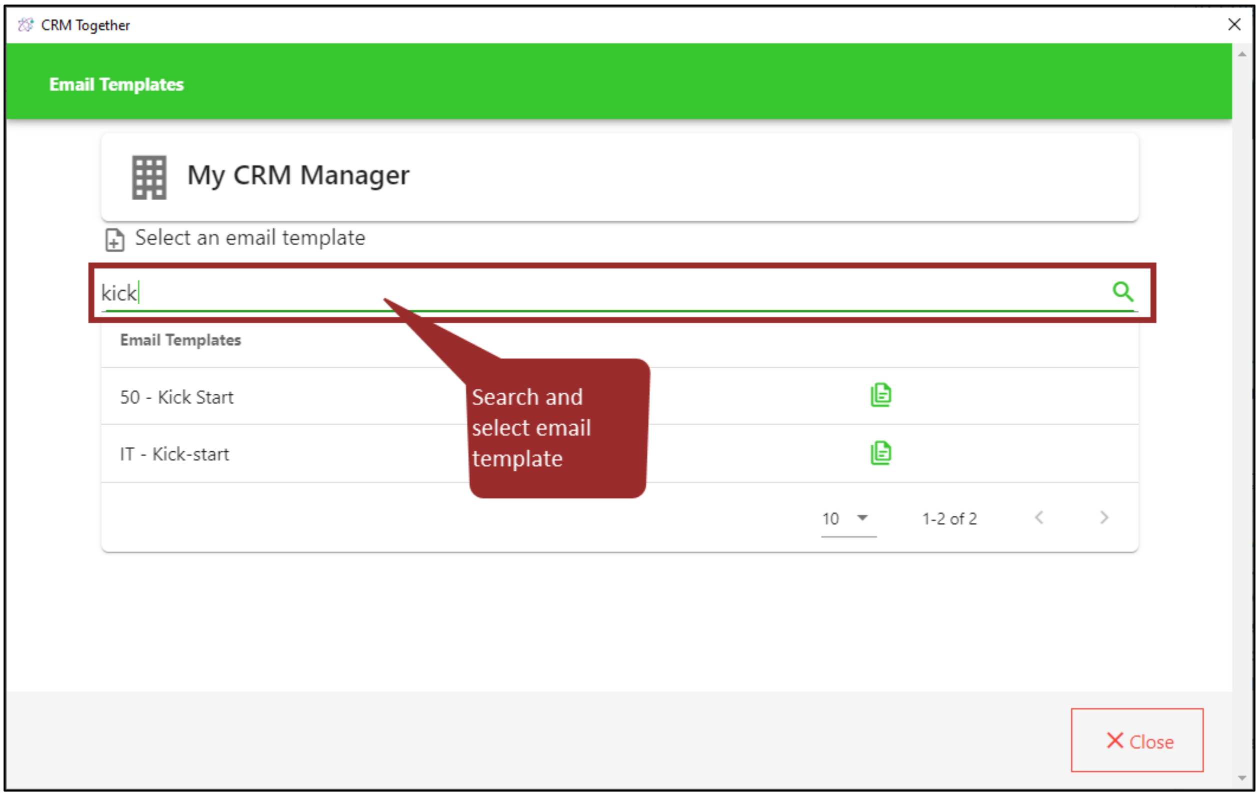
You can select Shared Documents that are saved in CRM and attach them to an outgoing email



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)





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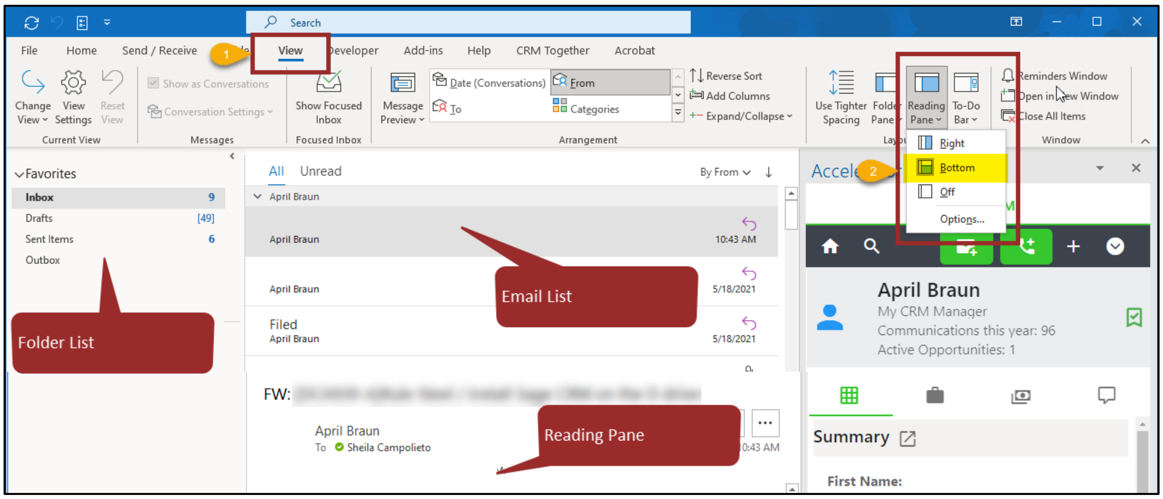
Viewing Accelerator on the Outlook Screen

1. Outlook Layout

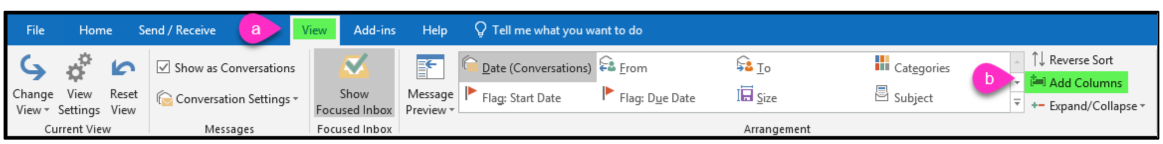
   To change the layout of the Outlook screen to accommodate the addition of the new Accelerator Pane (which opens on the right side), select the **View** tab and click on **Reading Pane** and choose **Bottom**



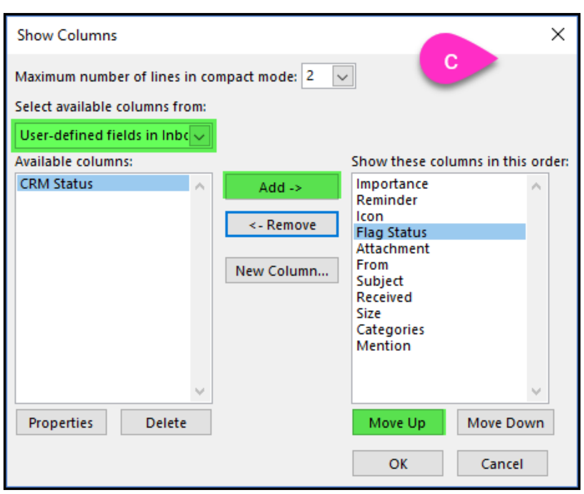
2. CRM Status for Inbox

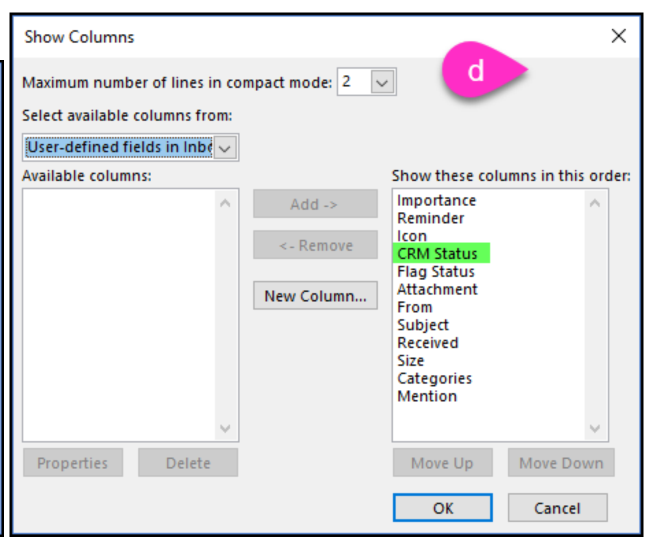
   NOTE: This status field is only displayed *after* the first email has been saved/stored in CRM
   To display the CRM Status column (if an email has already been filed using Accelerator):

   a. Select the **View** tab
   b. Click on **Add Columns**:



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





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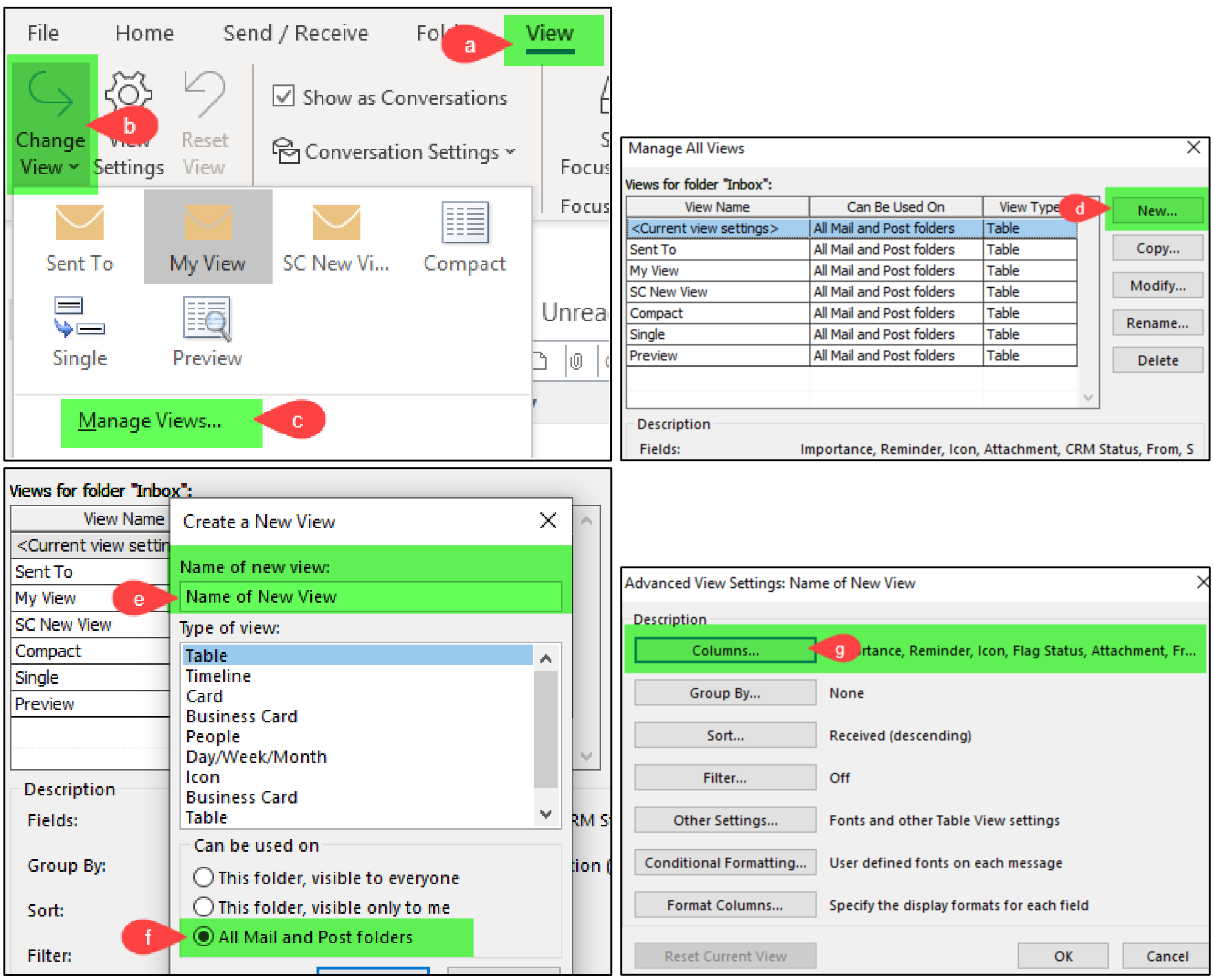
3. CRM Status for Subfolders

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:

a. Click View tab
b. Change View
c. Manage Views
d. New
e. Enter a name for new view
f. Check the box for All Mail and Post folders –> OK
g. Columns



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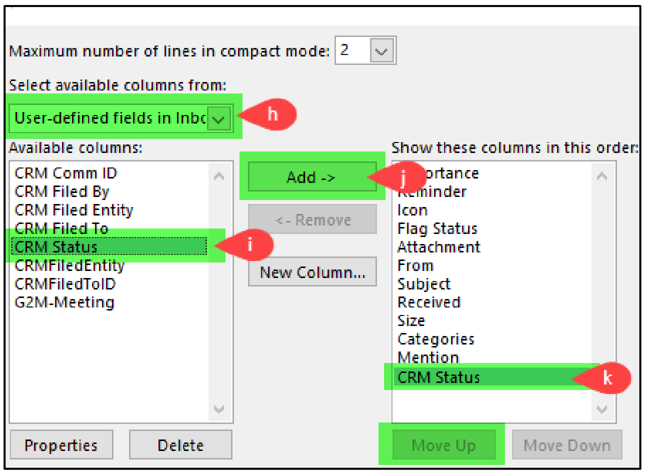
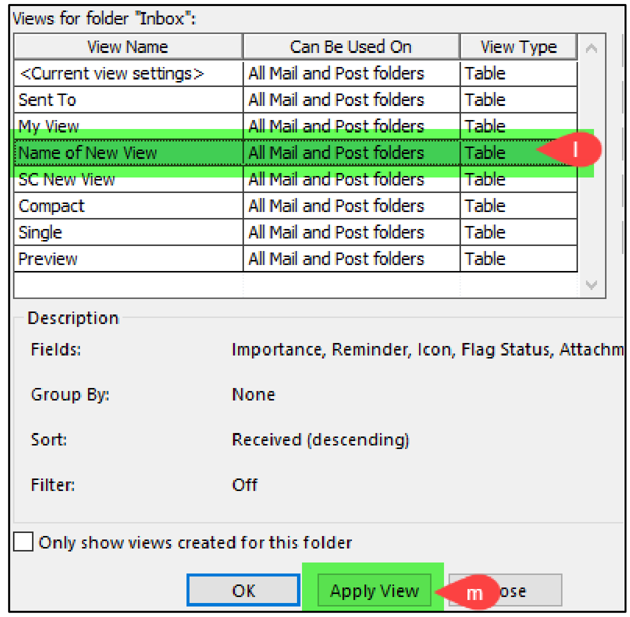
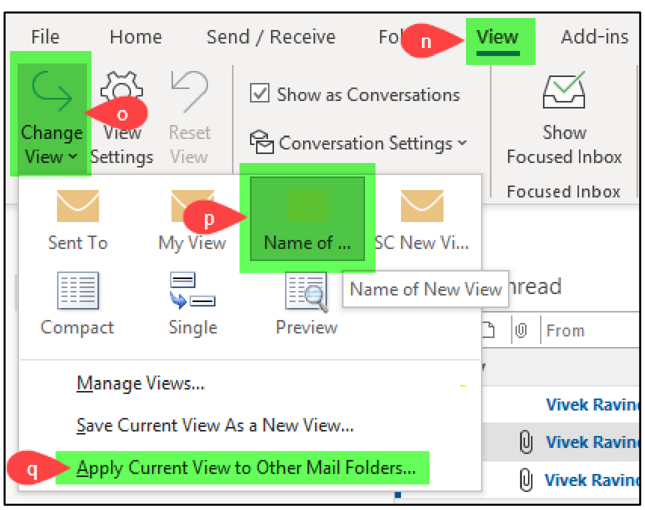
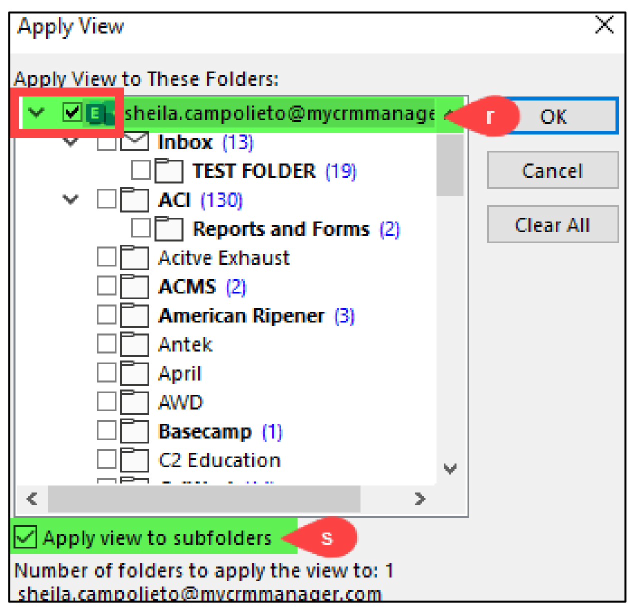
h. Scroll down to User-defined fields in Inbox
i. Select CRM Status
j. Add
k. Select CRM Status and click Move Up to place the CRM Status column where you choose –> OK
l. Select the new view just created
m. Apply View (this applies the view to the highlighted folder, continue to next steps to apply view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





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)





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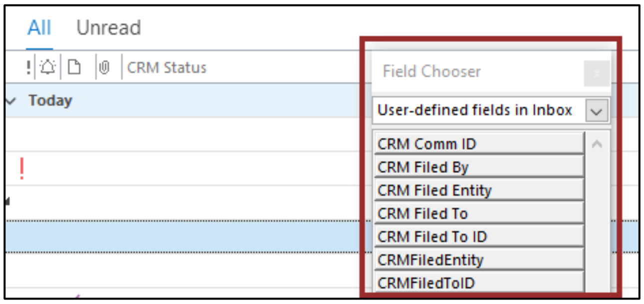
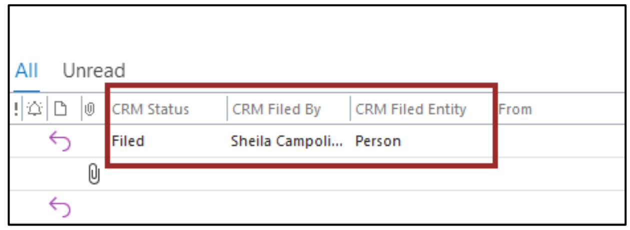
If you later create a new folder, you can apply your new view to by selecting the new folder and completing steps n, o, and p from above.

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.

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