



Sage CRM User Guide

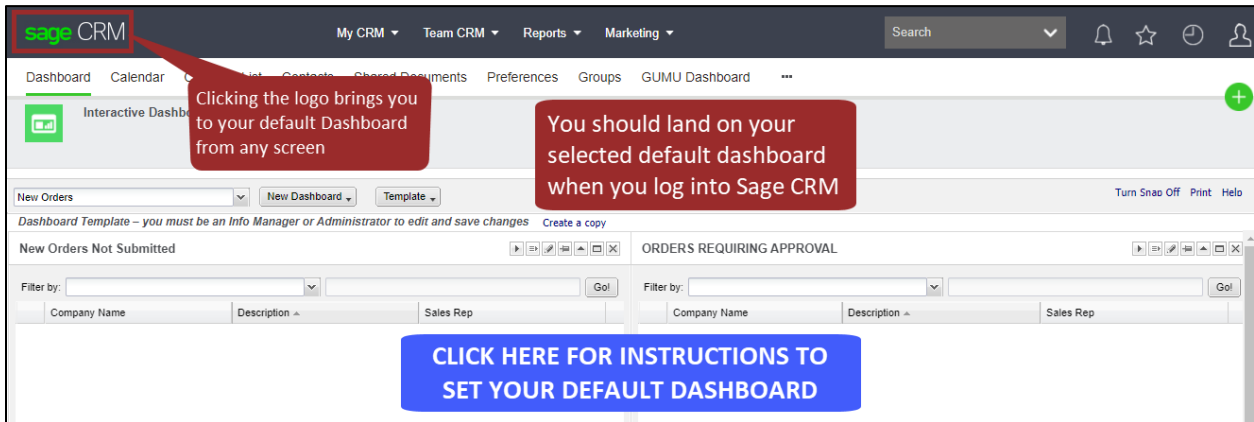
This document shows the ways in which Sage CRM will be used. While certain sections may not directly apply to your responsibilities within the organization, it is important that you understand the functionality and purpose of Sage CRM and how it will be used by all departments.

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Accessing Sage CRM

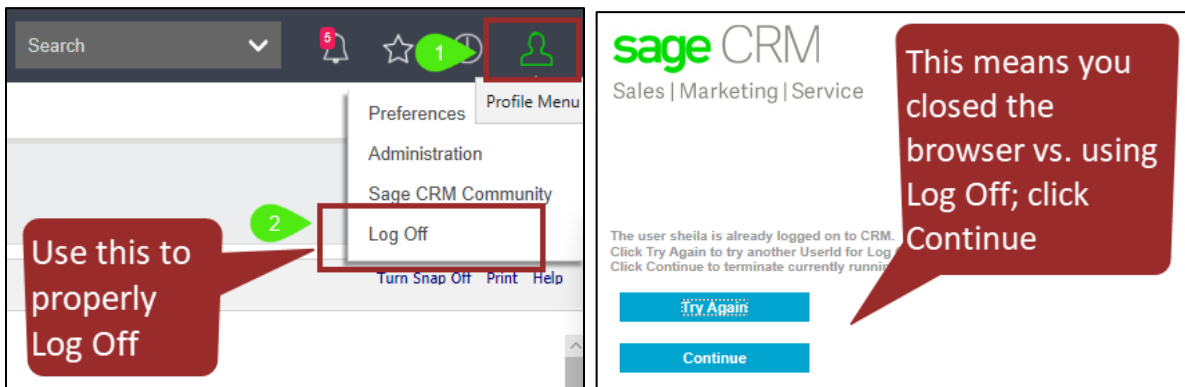
- **URL:** **INSERT**
- **User Name:** usually your first name – *not* case sensitive (confirm with your System Admin)
- **Password:** will be sent to you via email – *is* case sensitive (confirm with your System Admin)



Clicking the logo brings you to your default Dashboard from any screen

You should land on your selected default dashboard when you log into Sage CRM

CLICK HERE FOR INSTRUCTIONS TO SET YOUR DEFAULT DASHBOARD



Use this to properly Log Off

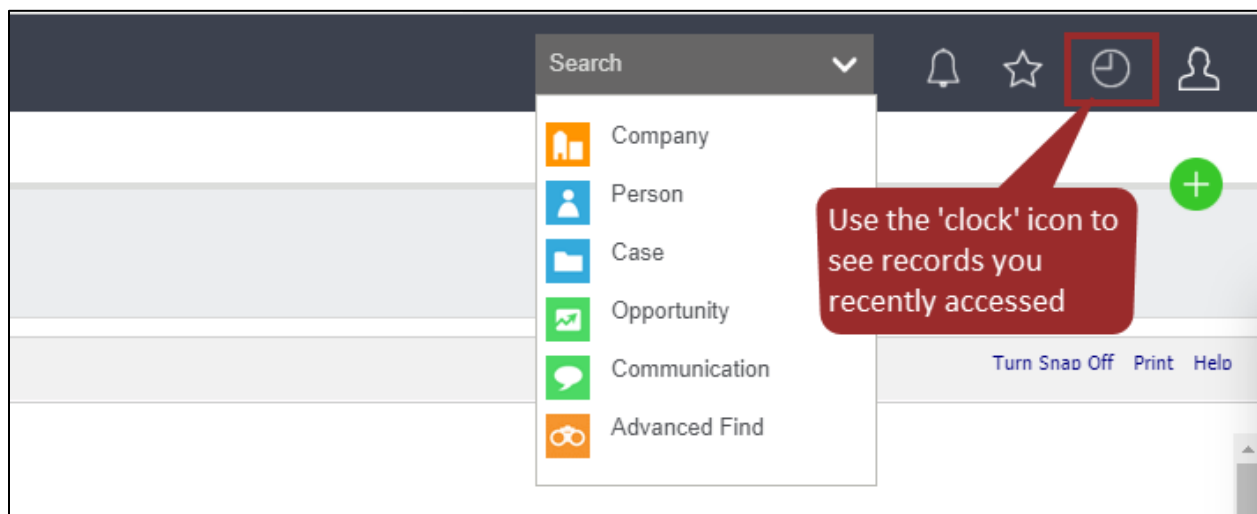
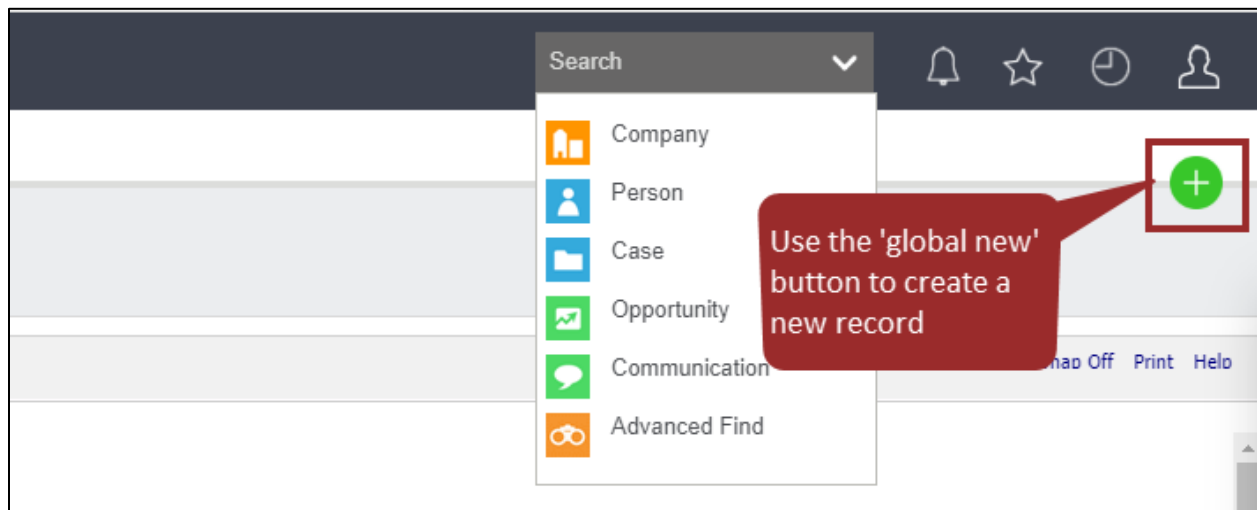
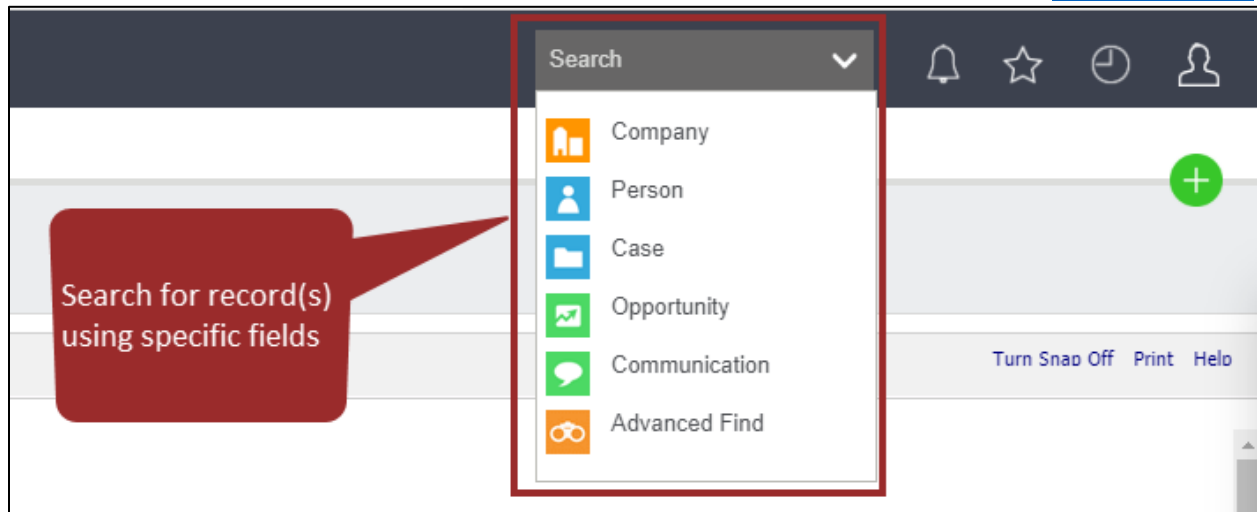
This means you closed the browser vs. using Log Off; click Continue



- Click check box for Change Password

- You will have to enter your old password and new password

- If you are using Accelerator or MobileX, be sure to change the password for each to match your new CRM password



Sage CRM Terminology

The below terms are standard in Sage CRM. Becoming familiar with them will help new users make the connection to the terms you currently use in your business. Most of these terms can be changed, as you begin to customize your system, to match your internal terminology.

Primary Entities

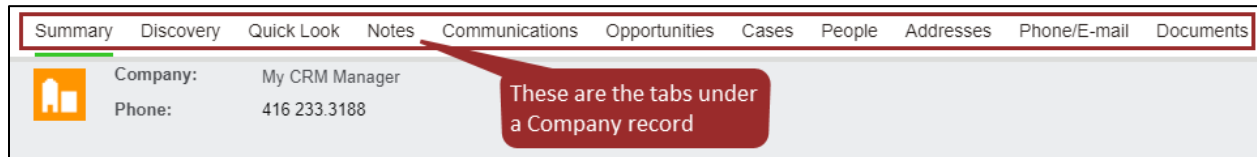
- **Company**
 - Company records are Prospects, Customers (i.e. linked to your accounting system), Vendors, Suppliers (or other types of organizations your Company interacts with)
- **Person**
 - Person records are the Contacts under Company records (if requested, they can be created without a link to a Company record)
- **Communication**
 - Communication records are Emails, Appointments, Tasks and can be further categorized by Actions (i.e. Meeting, Phone Out, Email In, etc)
 - Communication statistics provide a quick glimpse of total number of communications, date of last communication, and days since last communication for each record
- **Lead** (*if used*)
 - Lead records are for new business and not yet linked to a Company or Opportunity, but both can be created from a Lead (can be linked to workflow)
- **Opportunity** (*if used*)
 - Opportunity records are for Sales deals (can be linked to workflow)
- **Case** (*if used*)
 - Case records are for Customer Service issues, Jobs, Tickets, or other transactions your Company tracks (can be linked to workflow)

Secondary Entities

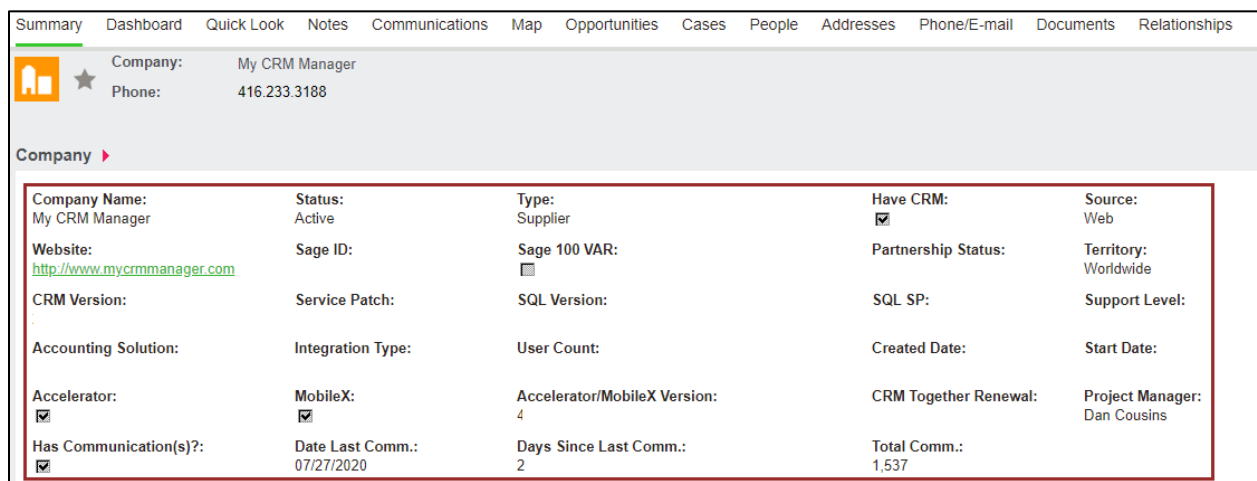
- **Address**
 - Addresses are created under Company and Person records; the 'default Address' is the primary Address that appears on the Summary page
- **Note** (do not confuse Notes with Communications!)
 - Notes allow you document miscellaneous information such as customer preferences, birthdays, anniversaries, hobbies, odd work hours, etc.
- **Document**
 - You can attach proposals, drawings, applications, images or any other type of document
- **User**
 - Users are the people in your Company who will be logging in and using Sage CRM

Screens & Lists

- **Tabs** are the various entities linked to each record and visible from any screen
 - The Summary tab is the primary screen you land on when going to a record

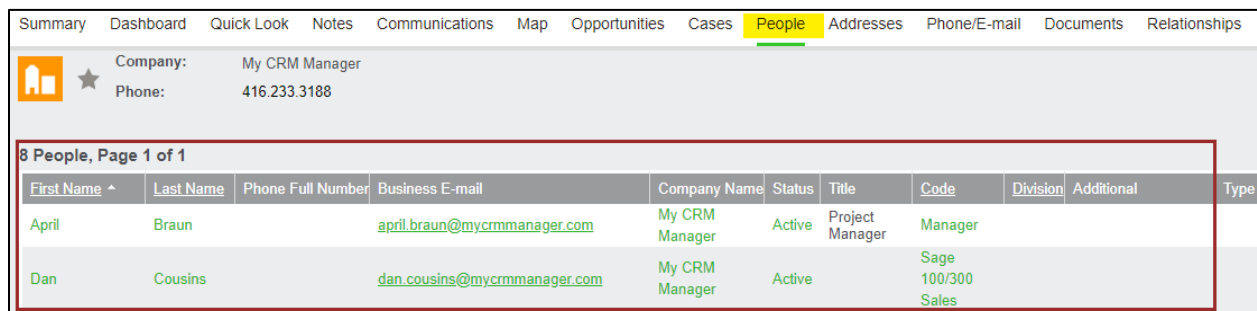


- **Fields** hold the data on each of the screens and are customizable for each entity (can be required, read-only, inherit data, and can be text, date/time, checkbox, selection, multiselect)



| | | | | |
|-----------------------------------------------------------------------------------|-------------------------------------------------|-------------------------------------------|--------------------------------------------------|---------------------------------|
| Company Name: My CRM Manager | Status: Active | Type: Supplier | Have CRM: <input checked="" type="checkbox"/> | Source: Web |
| Website: http://www.mycrmmanager.com | Sage ID: | Sage 100 VAR: <input type="checkbox"/> | Partnership Status: | Territory: Worldwide |
| CRM Version: | Service Patch: | SQL Version: | SQL SP: | Support Level: |
| Accounting Solution: | Integration Type: | User Count: | Created Date: | Start Date: |
| Accelerator: <input checked="" type="checkbox"/> | MobileX: <input checked="" type="checkbox"/> | Accelerator/MobileX Version: 4 | CRM Together Renewal: | Project Manager: Dan Cousins |
| Has Communication(s)?: <input checked="" type="checkbox"/> | Date Last Comm.: 07/27/2020 | Days Since Last Comm.: 2 | Total Comm.: 1,537 | |

- **Lists** refer to the line items under a tab and linked to the active record



| First Name | Last Name | Phone Full Number | Business E-mail | Company Name | Status | Title | Code | Division | Additional | Type |
|------------|-----------|-------------------|--------------------------------------------------------------------------------|----------------|--------|-----------------|--------------------|----------|------------|------|
| April | Braun | | april.braun@mycrmmanager.com | My CRM Manager | Active | Project Manager | Manager | | | |
| Dan | Cousins | | dan.cousins@mycrmmanager.com | My CRM Manager | Active | | Sage 100/300 Sales | | | |

[Back to Contents](#)

- **Find screens** allow you to find records for a specific entity based on the search criteria entered
 - % is the wildcard

Find:

Find

Company Name: Status: Type:

Accounting Solution: Integration Type: User Count:

Created Date: Created By:

Start Date: Project Manager:

21 Companies, Page 1 of 2

| Company Name ^ | Type | Status | Partnership Status | Sage 100 VAR | City | CRM Version | User Count | Source |
|----------------|----------|--------|--------------------|--------------|-----------|-------------|------------|--------|
| My CRM Manager | Supplier | Active | | | Etobicoke | 2020 | 20 | Web |
| My Bookkeeper | Prospect | Closed | | | | | 0 | Web |

- **Grids** refer to the list of results of a search on the Find screen

Find:

Find

Company Name: Status: Type:

Accounting Solution: Integration Type: User Count:

Created Date: Created By:

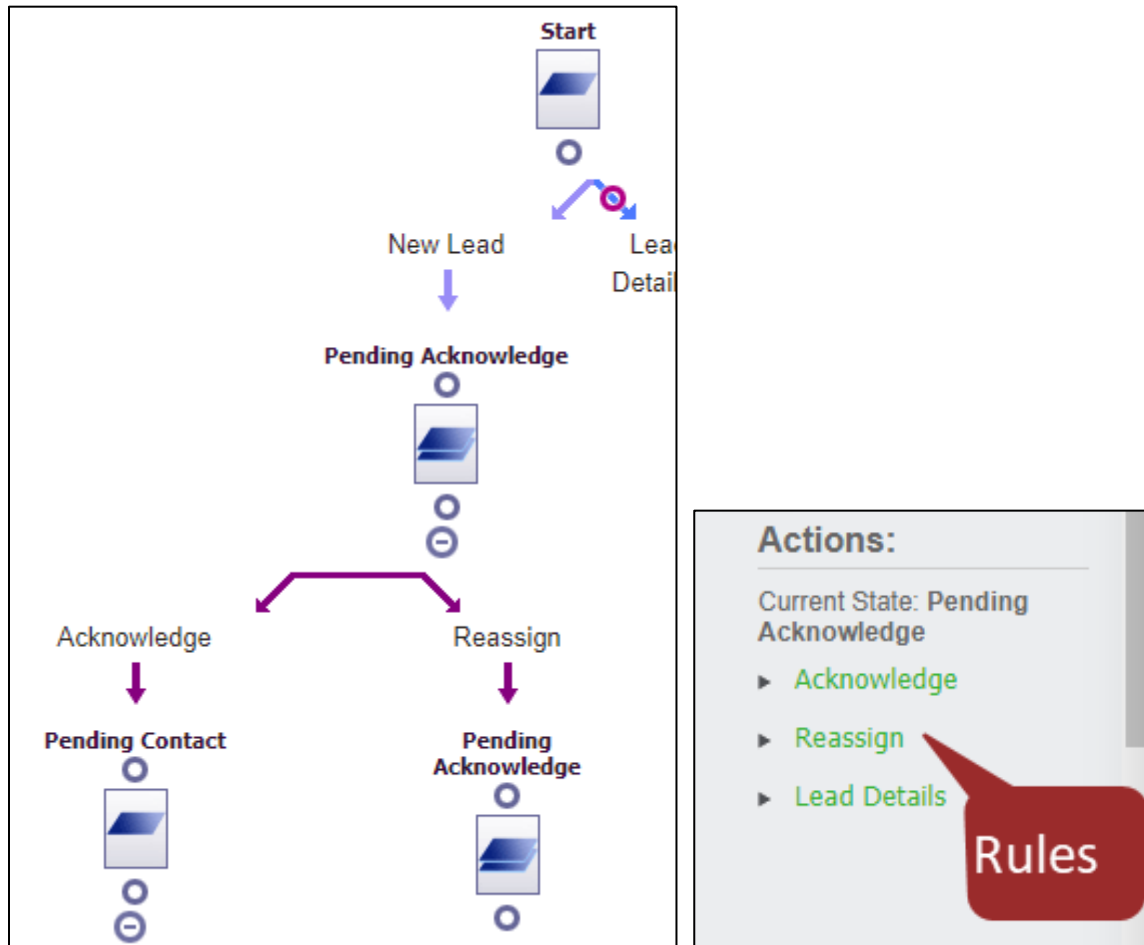
Start Date: Project Manager:

21 Companies, Page 1 of 2

| Company Name ^ | Type | Status | Partnership Status | Sage 100 VAR | City | CRM Version | User Count | Source |
|----------------|----------|--------|--------------------|--------------|-----------|-------------|------------|--------|
| My CRM Manager | Supplier | Active | | | Etobicoke | 2020 | 20 | Web |
| My Bookkeeper | Prospect | Closed | | | | | 0 | Web |

Workflow

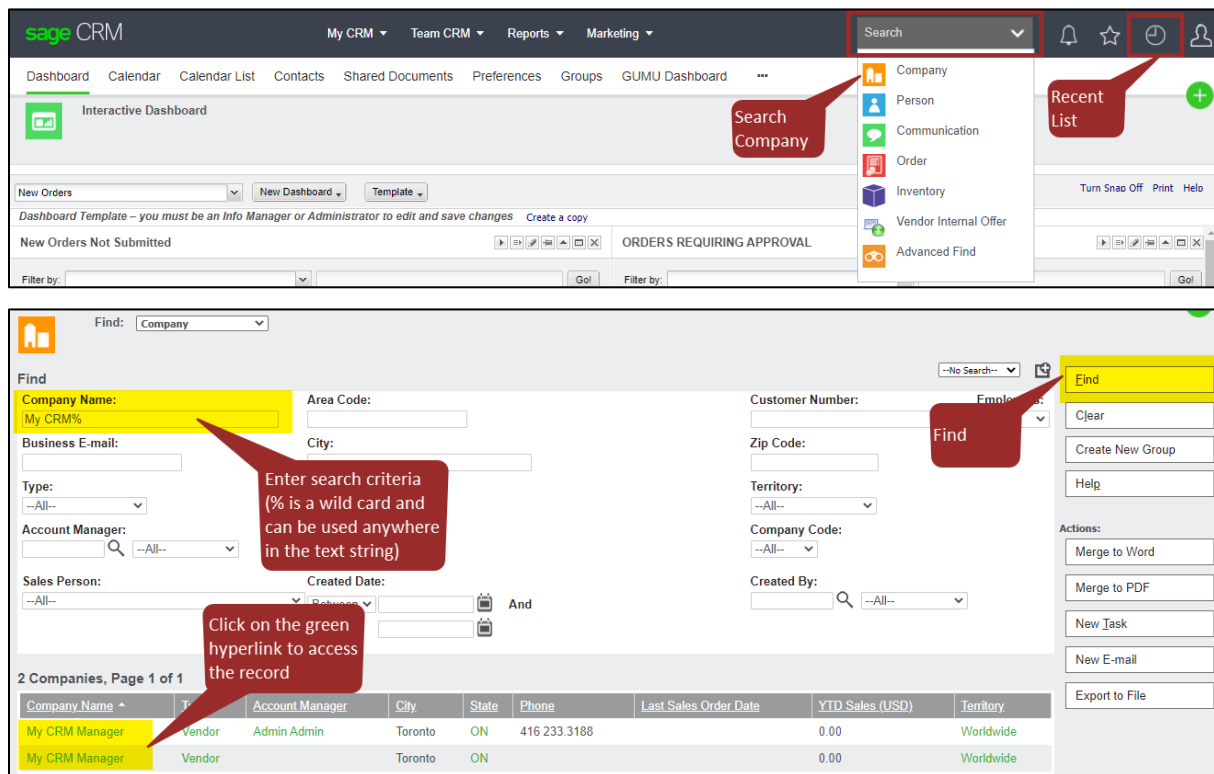
- Workflow can be used for Leads, Cases, and Opportunities and force user behavior to progress the entity from start to finish via the workflow rules/actions and allow tracking of the various stages
- Additional content related to Workflow can be found on this page [Process Controls within Sage CRM – My CRM Manager](#).



Key Entities of Sage CRM

Company

- A Company record is prospective customer, prospective vendor, customer, or vendor.
- Sage CRM is integrated with Sage 100, your accounting system. The integration occurs at the Company level in Sage CRM and the Sage 100 fields are read only (not editable).
- To access a Company record, use the Search > Find screen or Recent list.



Search > Find

Find

Find: Company

Company Name: My CRM%
 Business E-mail:
 Type: --All--
 Account Manager: --All--
 Sales Person: --All--
 Area Code:
 City:
 Customer Number:
 Zip Code:
 Territory: --All--
 Company Code: --All--
 Created By: --All--

Enter search criteria (% is a wild card and can be used anywhere in the text string)

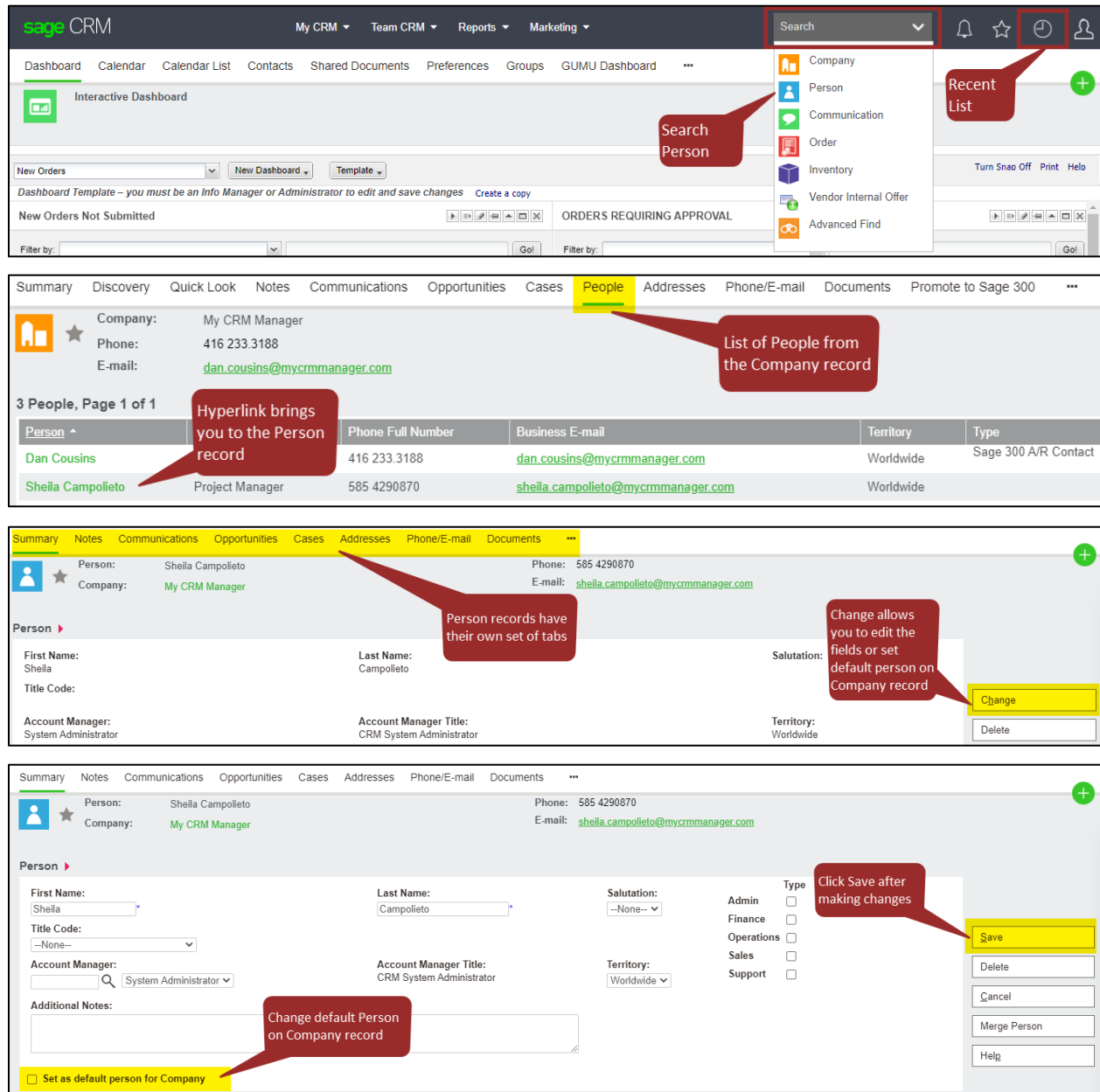
Click on the green hyperlink to access the record

2 Companies, Page 1 of 1

| Company Name | Type | Account Manager | City | State | Phone | Last Sales Order Date | YTD Sales (USD) | Territory |
|----------------|--------|-----------------|---------|-------|--------------|-----------------------|-----------------|-----------|
| My CRM Manager | Vendor | Admin Admin | Toronto | ON | 416 233 3188 | | 0.00 | Worldwide |
| My CRM Manager | Vendor | | Toronto | ON | | | 0.00 | Worldwide |

Person

- A Person record is a contact associated with a Company record.
- To access a Person record, use the Search > Find screen or Recent list.



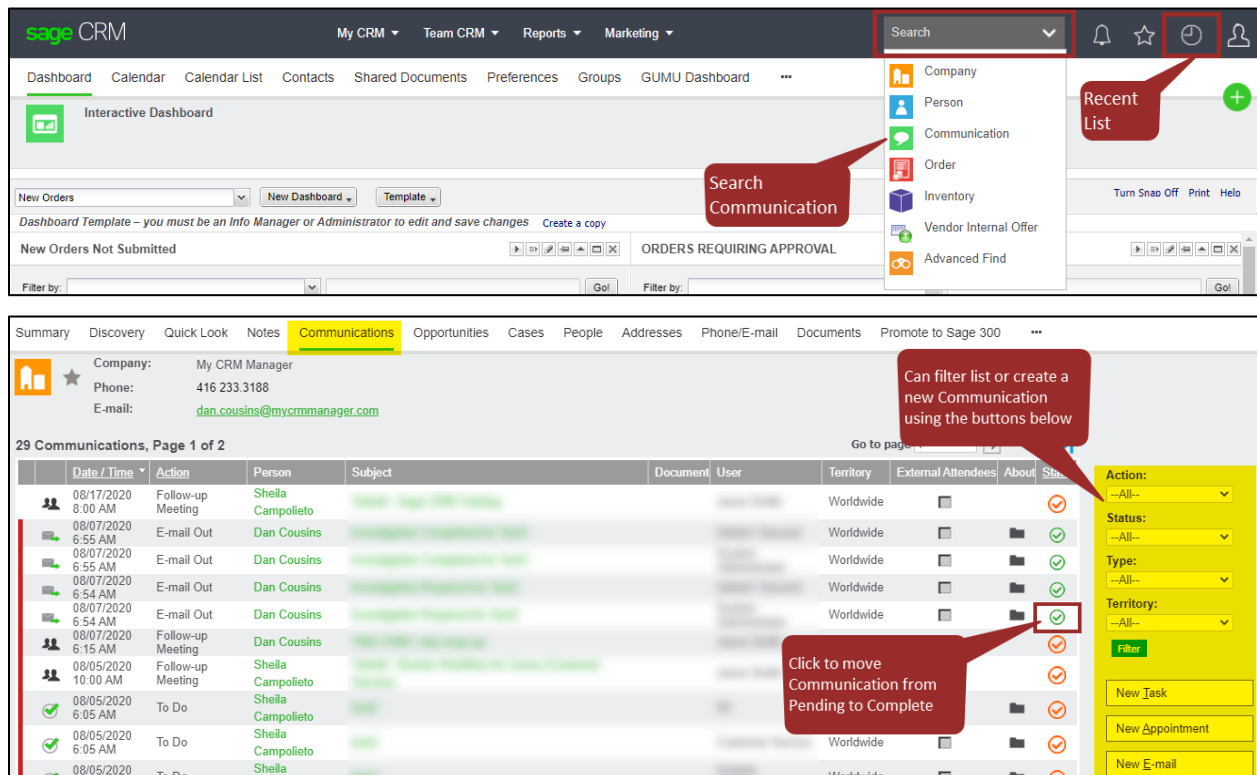
The screenshot illustrates the process of finding and editing a Person record in Sage CRM. It is divided into three main sections:

- Search Interface:** The top section shows the 'Search' dropdown menu with options like Company, Person, Communication, Order, Inventory, Vendor Internal Offer, and Advanced Find. A 'Recent List' button is also visible.
- Person List:** The middle section displays a list of people associated with the company 'My CRM Manager'. The list includes columns for Name, Phone Full Number, Business E-mail, Territory, and Type. A callout indicates that a 'Hyperlink brings you to the Person record'.
- Person Detail View:** The bottom section shows the details for 'Sheila Campolieto'. It includes fields for First Name, Last Name, Title Code, Account Manager, and Account Manager Title. A callout notes that 'Person records have their own set of tabs'. Another callout points to the 'Change' button, stating 'Change allows you to edit the fields or set default person on Company record'.

At the bottom, the 'Save' button is highlighted with a callout: 'Click Save after making changes'. Below the 'Save' button are buttons for 'Delete', 'Cancel', 'Merge Person', and 'Help'.

Communications

- A Communication is a date stamped record, such as an email, phone call, or meeting created as Emails, Tasks, and Appointments associated with a Company and/or Person.
- To access a Communication record, use the Search > Find screen OR go directly to the Communications tab under the corresponding record
- A complete breakdown of Communications, including instructional videos, can be found on this page [Communication Tracking – My CRM Manager](#).

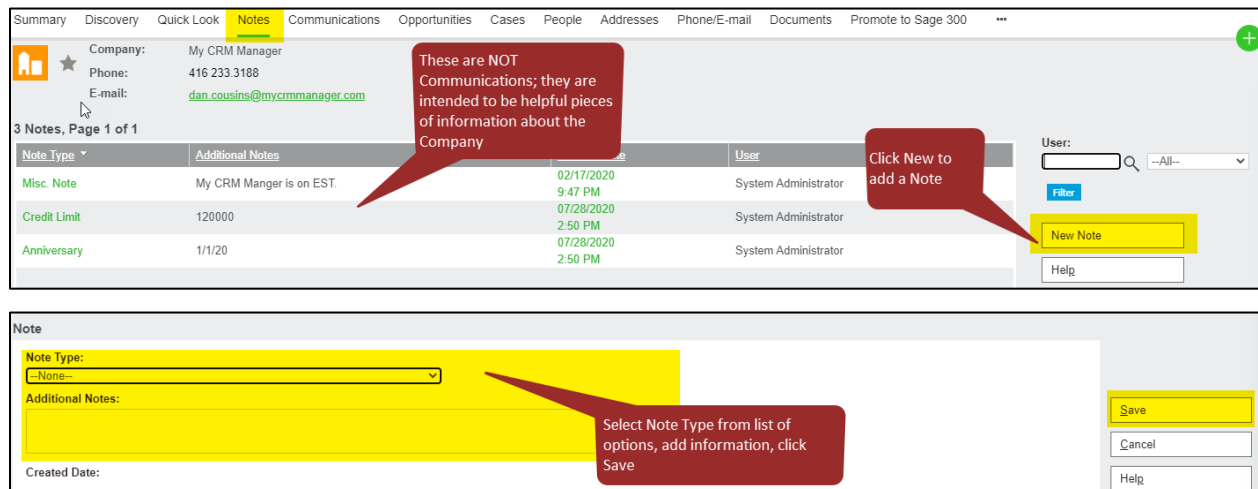


The screenshot displays the Sage CRM interface. The top navigation bar includes 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. A search bar is highlighted with a red box and a callout 'Search Communication'. The 'Communications' tab is selected, showing a list of 29 communications. A callout points to the 'Filter' button on the right, stating 'Can filter list or create a new Communication using the buttons below'. Another callout points to the 'Status' column, stating 'Click to move Communication from Pending to Complete'.

| Date / Time | Action | Person | Subject | Document | User | Territory | External Attendees | About | Status |
|---------------------|-------------------|-------------------|---------|----------|------|-----------|--------------------|-------|--------|
| 08/17/2020 8:00 AM | Follow-up Meeting | Sheila Campolieto | | | | Worldwide | | | ✓ |
| 08/07/2020 6:55 AM | E-mail Out | Dan Cousins | | | | Worldwide | | | ✓ |
| 08/07/2020 6:55 AM | E-mail Out | Dan Cousins | | | | Worldwide | | | ✓ |
| 08/07/2020 6:54 AM | E-mail Out | Dan Cousins | | | | Worldwide | | | ✓ |
| 08/07/2020 6:54 AM | E-mail Out | Dan Cousins | | | | Worldwide | | | ✓ |
| 08/07/2020 6:15 AM | Follow-up Meeting | Dan Cousins | | | | Worldwide | | | ✓ |
| 08/05/2020 10:00 AM | Follow-up Meeting | Sheila Campolieto | | | | Worldwide | | | ✓ |
| 08/05/2020 6:05 AM | To Do | Sheila Campolieto | | | | Worldwide | | | ✓ |
| 08/05/2020 6:05 AM | To Do | Sheila Campolieto | | | | Worldwide | | | ✓ |
| 08/05/2020 | To Do | Sheila Campolieto | | | | Worldwide | | | ✓ |

Notes

- A Note is information related to the specific entity (i.e. Company or Person); separate from Communication records.
- Notes are not reportable or searchable.



The screenshot displays the 'Notes' tab in the myCRM Manager interface. The top navigation bar includes 'Summary', 'Discovery', 'Quick Look', 'Notes' (highlighted), 'Communications', 'Opportunities', 'Cases', 'People', 'Addresses', 'Phone/E-mail', 'Documents', and 'Promote to Sage 300'. The left sidebar shows the company details for 'My CRM Manager' (Phone: 416 233.3188, E-mail: dan.cousins@mycrmmanager.com) and indicates '3 Notes, Page 1 of 1'.

The main content area shows a table of notes:

| Note Type | Additional Notes | Date | User |
|--------------|--------------------------|--------------------|----------------------|
| Misc. Note | My CRM Manger is on EST. | 02/17/2020 9:47 PM | System Administrator |
| Credit Limit | 120000 | 07/28/2020 2:50 PM | System Administrator |
| Anniversary | 1/1/20 | 07/28/2020 2:50 PM | System Administrator |

Annotations on the screenshot include:

- A red callout pointing to the table: "These are NOT Communications; they are intended to be helpful pieces of information about the Company".
- A red callout pointing to the 'New Note' button: "Click New to add a Note".
- A red callout pointing to the 'Note Type' dropdown in the 'Add Note' form: "Select Note Type from list of options, add information, click Save".

The 'Add Note' form includes a 'Note Type' dropdown (set to 'None'), a text area for 'Additional Notes', and a 'Created Date' field. Buttons for 'Save', 'Cancel', and 'Help' are visible on the right.

Documents

- A Document can be attached to any entity.
- Documents are not reportable or searchable.

Summary Discovery Quick Look Notes Communications Opportunities Cases People Addresses Phone/E-mail **Documents** A/R Inquiry Customer O/E Inquiry Linked Cont

Company: My CRM Manager. Sage 300 Customer Number: MYCRMMANAGER
Phone: 416 233.3188 Sage 300 Company Name: 26. OHSERASE MFG. LLC
E-mail: dan_cousins@mycrmmanager.com

7 Documents Found, Page 1 of 1

| Created Date | File | Type | Owner | Description | Status |
|---------------------|-------------------------------------------------------------|--------------------|----------------------|--------------------------------------|--------|
| 09/18/2020 4:01 AM | contract(1).txt | Proposal | System Administrator | My CRM Manager - Tobacco - 9/18/2020 | Final |
| 09/18/2020 3:56 AM | contract.txt | Proposal | System Administrator | My CRM Manager - Tobacco - 9/18/2020 | Final |
| 09/16/2020 3:48 PM | Blank_Resume.docx | Proposal | Admin1 Second | | Final |
| 09/09/2020 1:54 PM | Sage_CRM_Proposal_for_Kam's_Grower_Supply_August_3_2020.pdf | Proposal | System Administrator | | Final |
| 09/09/2020 1:37 PM | Application_Form.docx | Location-Front/Ext | System Administrator | | Final |
| 08/28/2020 11:30 AM | Check-In_Form.docx | Proposal | System Administrator | My CRM Manager - Tobacco - 8/28/2020 | Final |

Displays Type selected when Document was attached

To attach a Document from any entity, go to the Documents tab and click Add File

Owner: --All--
Filter
Merge to Word
Merge to PDF
Add File

For

Company: My CRM Manager
Phone: 416 233.3188
Regarding:

Person: Dan Cousins
Phone: 416 233.3188

Select a Type and click Save; other fields are not required
NOTE: if Type = Product Photo under Vendor Offer, the image will appear under the Summary page of the Vendor Offer and in the Notify Sales & Customer Offer email

Details

Type: --None--
Category: Sales
Status: Final
Owner: System Administrator
Team: --None--

Description:

Action: To Do
Territory: Worldwide

Create Communication and save merged document

File(s)

| File Name | Type | Size (KB) |
|------------------------|------|-----------|
| Test Order 7.26.21.doc | doc | 47KB |

Note that the file name appears at the bottom

Summary Notes Communications **Documents** ...

Orders: ORD-110/1: A.C. of Miami, Inc.- 7.14.2021
Opportunity: Auto : A.C. of Miami, Inc.- 7.14.2021
Company: USP McCreary

Person: Don Peace
Phone: 606 3547250
E-mail: DPEACE@BO

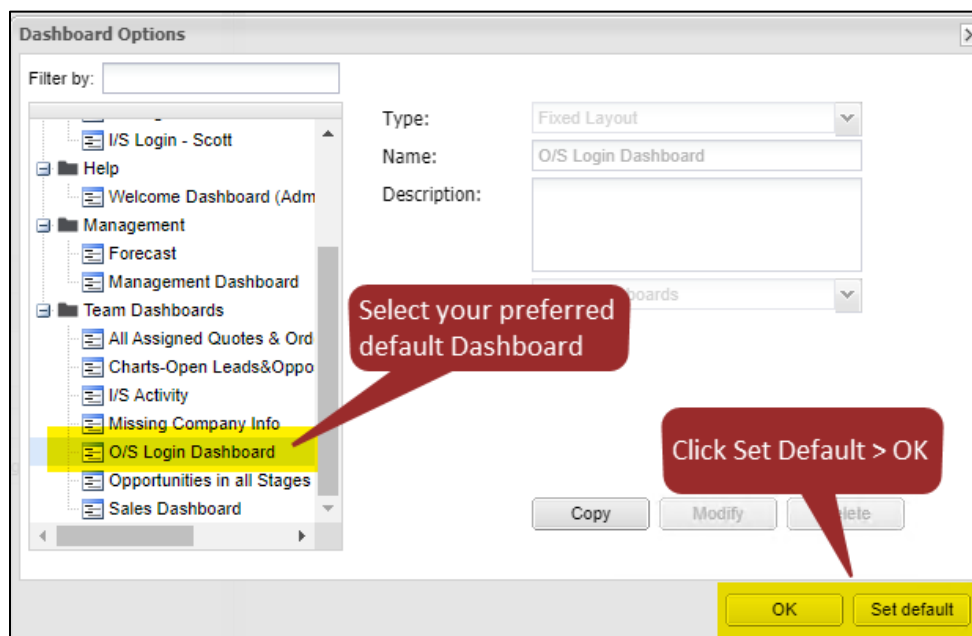
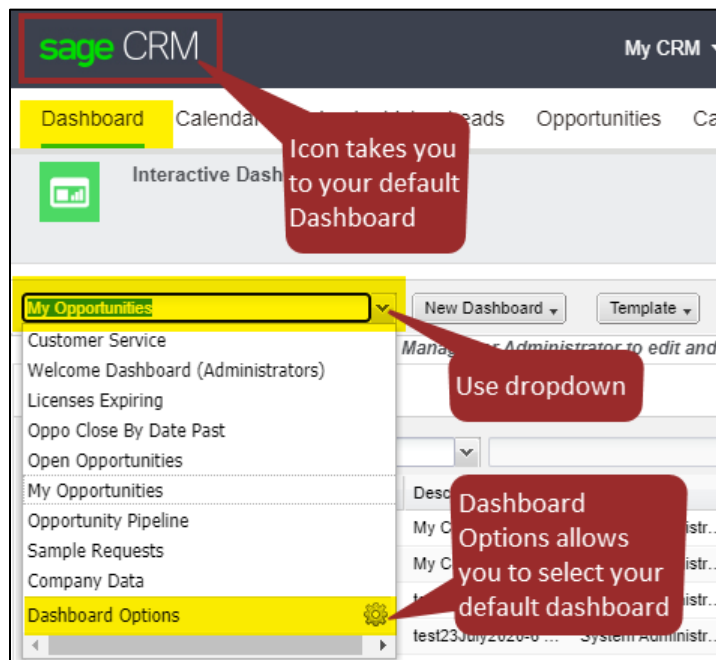
1 Documents Found, Page 1 of 1

| Updated | File | Type | Description | Status |
|-------------|------------------------|-------|-------------|--------|
| Today 13:57 | Test_Order_7.26.21.doc | Order | | Final |

Go to the Documents tab > click on the paper clip or the File to open the Order document

Dashboards and Gadgets

- **Dashboards** are created from Reports and allow users to get a quick glimpse of information such as Types of Communications created last month, Open Opportunities, Inactive Companies; they can be lists or graphs
 - Each User can set their own default Dashboard (i.e. the one you land on when you log in) by following the below steps.
- **Gadgets** are the individual blocks that display the information on the Dashboard



Project Manager Dashboard New Dashboard Template

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)

All Open Cases

Filter by: None Status Stage Company Name Description Priority Go

You can use the 'Filter by' drop down to filter the list by any of the fields except Team and User fields

| Status | Team | Stage | Company Name | Description | Required By | Priority | Updated By | U |
|-------------|----------------|-------------------|--------------|-------------|-------------|---------------|-------------|---|
| In Progress | My CRM Manager | Submitted | | | | | April Braun | 0 |
| In Progress | Greytrix | Solved - Deployed | | | 07/21/2021 | 2 - Important | April Braun | 0 |

Project Manager Dashboard New Dashboard Template

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)

All Open Cases

Filter by: Company Name acms Go

Select the Filter by > enter search criteria > click Go

| Status | Team | Stage | Company Name | Description | Required By | Priority | Updated By | U |
|-------------|----------------|-------------------|-----------------|--------------------------|-------------|-----------------|-------------|---|
| In Progress | My CRM Manager | Logged | | | 07/30/2021 | 4 - Not Defined | April Braun | 0 |
| In Progress | My CRM Manager | Logged | | | 07/30/2021 | 4 | | 0 |
| In Progress | My CRM Manager | Logged | | | 07/30/2021 | 4 | | 0 |
| In Progress | My CRM Manager | Submitted | | | 07/30/2021 | 4 | | 0 |
| In Progress | Greytrix | Solved - Deployed | JLW Instruments | JLW Instruments/Fix s... | 07/21/2021 | 2 - Important | April Braun | 0 |

Project Manager Dashboard New Dashboard Template

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)

All Open Cases

Filter by: Company Name acms Go

Now your list displays the filtered search criteria only

| Status | Team | Stage | Company Name | Description | Required By | Priority | Updated By | U |
|-------------|----------------|--------|--------------|-------------------------|-------------|-----------------|-------------|---|
| In Progress | My CRM Manager | Logged | ACMS | ACMS/Customize Acce... | 07/30/2021 | 4 - Not Defined | April Braun | 0 |
| In Progress | CRM Together | Logged | ACMS | ACMS/Disable case no... | | 3 - Not Urgent | April Braun | 0 |
| In Progress | My CRM Manager | Logged | ACMS | ACMS/Customize Acce... | | 2 - Important | April Braun | 1 |

Project Manager Dashboard New Dashboard Template

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)

All Open Cases

Filter by: Company Name Go

You click on the name of the field in the header to sort by that field, except Team and User fields

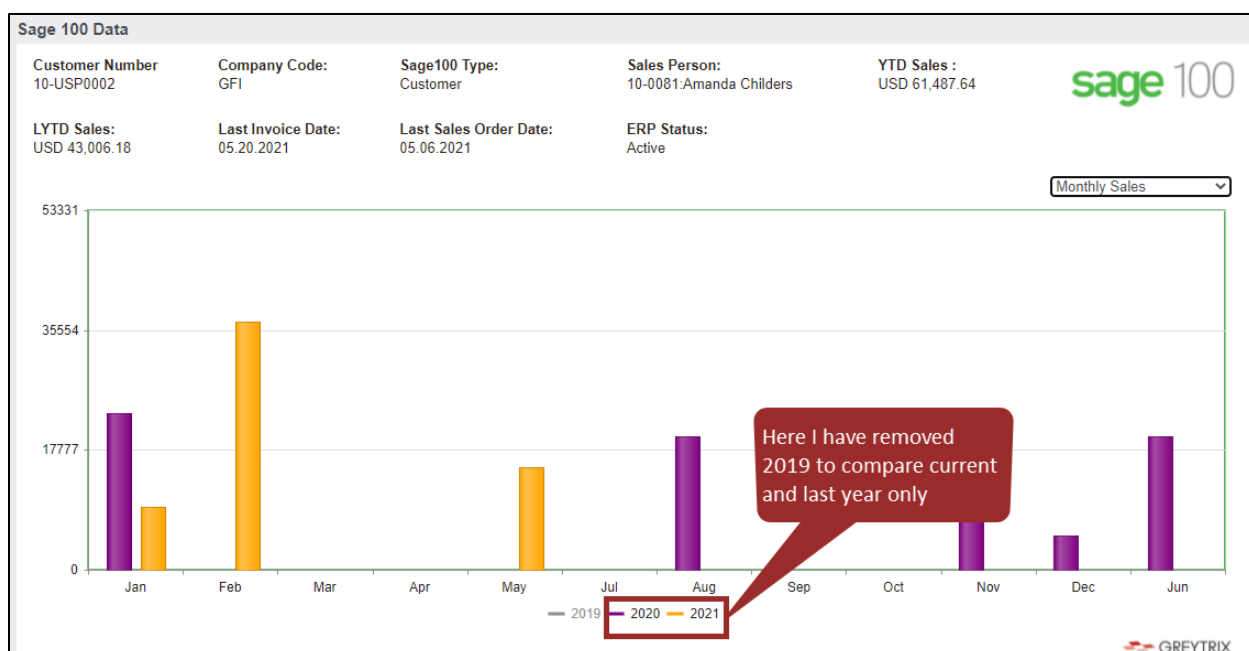
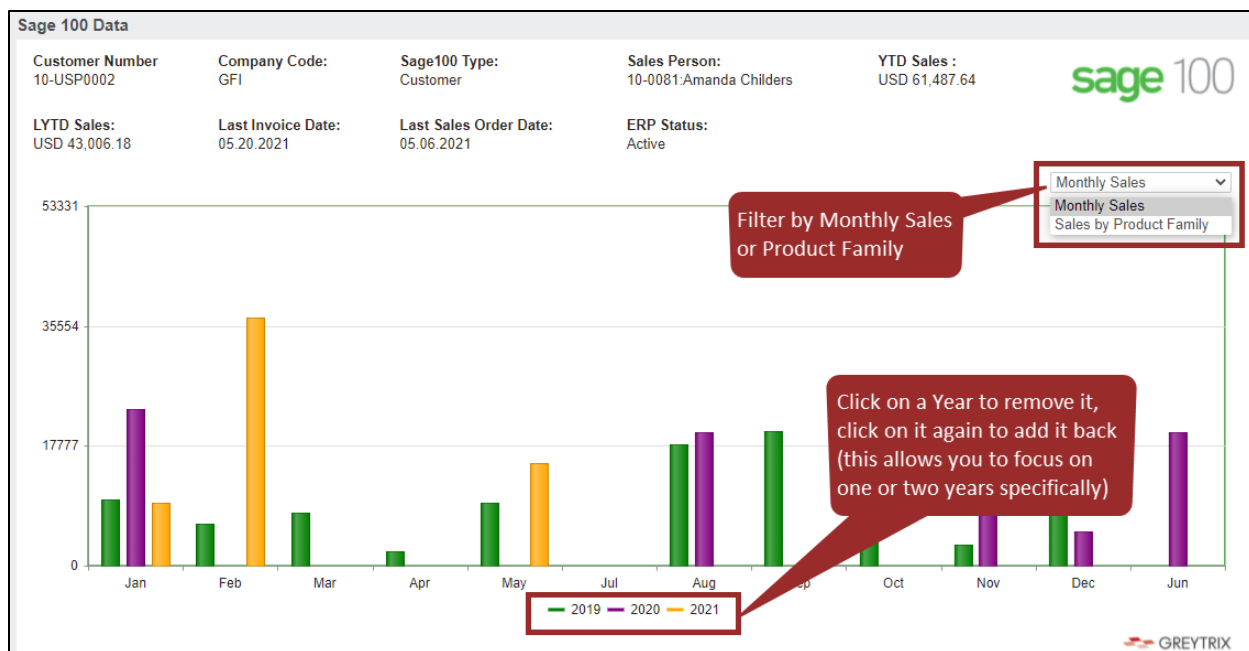
| Status | Team | Stage | Company Name | Description | Required By | Priority | Updated By | U |
|-------------|----------------|-----------|--------------|-------------|-------------|----------------|-------------|---|
| In Progress | Greytrix | Submitted | AC | | 07/07/2021 | 3 - Not Urgent | Dan Cousins | 0 |
| In Progress | Greytrix | Submitted | AC | | 07/07/2021 | 3 - Not Urgent | Dan Cousins | 0 |
| In Progress | CRM Together | Logged | ACMS | | | 3 - Not Urgent | April Braun | 0 |
| In Progress | My CRM Manager | Logged | ACMS | | | 2 - Important | April Braun | 1 |

Sage 100

The Sage 100 tabs only appear if the Company record is a Customer or a Vendor and linked to a Sage 100 Customer or Vendor record. The data that appears under each Sage 100 tab is pulled directly from Sage 100. You can view Receipts, Invoices, Orders and accounting information under a Customer.



- Customer records display a graph to view Sales totals by Month or Product Family
- Vendor records do not include the sales graph

Customer Graphs



Customer Data

| | | | | | | | | | | | |
|---------|-----------|-------|----------------|--------|-----------|--------------|-----------|-----------------|-----------------|----------------------|-----|
| Summary | Dashboard | Notes | Communications | People | Addresses | Phone/E-mail | Documents | Customer Offers | Customer Orders | View ERP Data | ... |
|---------|-----------|-------|----------------|--------|-----------|--------------|-----------|-----------------|-----------------|----------------------|-----|



Company: USP Big Sandy
Phone: 606 4332400x1150



View Real Time Information From ERP

| | | | |
|------------------------------|------------------------------|-------------------------------|------------------------------------|
| A/R Invoices | Sales Orders | Sales Summary | Item Sales History |
|------------------------------|------------------------------|-------------------------------|------------------------------------|

| | | |
|-----------------------------------|--------------------------------|--------------------------------------|
| YTD Sales Details | Credit History | Customer Information |
|-----------------------------------|--------------------------------|--------------------------------------|

Vendor Data

| | | | | | | | | | | | |
|---------|-----------|-------|----------------|--------|-----------|--------------|-----------|---------------|---------------|-----------------|------------------------|
| Summary | Dashboard | Notes | Communications | People | Addresses | Phone/E-mail | Documents | Vendor Offers | Vendor Orders | Customer Offers | Sage 100 Vendor |
|---------|-----------|-------|----------------|--------|-----------|--------------|-----------|---------------|---------------|-----------------|------------------------|



Company: Con Agra Foods ***
Phone: 870 7938618
E-mail: ar.domesticcash@conagrafoods.com

Main

| | | |
|-------------------|----------------------|------------------------------|
| AP Division 00 | Vendor No CON0003 | Terms Code 05:Net 20 Days |
|-------------------|----------------------|------------------------------|

Additional

| | | |
|---------|-------------------------|---------------------|
| Comment | Vendor Status Active | Vendor Type None |
| Sort | G/L Account | |

Statistics

| | | |
|------------------------------------|-------------------------------|-----------------------------|
| Last Purchase Date 7/15/2021 | Last Payment Date 7/8/2021 | Last Check Number E00826 |
| Avg Day to Pay 13 | Avg Days Overdue 10 | Balance Due USD 5,880.00 |
| Last Check Amount USD 12,128.92 | | |

Accelerator

- The interface between Sage CRM and MS Outlook, which allows users to create and view records from Outlook.
- Your Accelerator password is the same as your Sage CRM password, so if you change your Sage CRM password, you must change your Accelerator password as well.
 - NOTE: Accelerator does not accept & or % characters in the Password, as Sage CRM webservices do not support this.
- Your Sage CRM Administrator should have the Accelerator User Guide if you have not already received
- Videos related to using Accelerator can be found on this page [Outlook Integration \(Accelerator 2021\) – My CRM Manager](#).

Training & Support

- For questions related to Sage CRM, please contact the Sage CRM Administrator, **NAME**, at **EMAIL**.
- If **NAME** cannot answer the question, **s/he** will reach out to the Project Manager at My CRM Manager.
- The expectation is that all Users will complete the initial training with My CRM Manager, use the system, and refer to the User Guide. If needed, **COMPANY** can request additional training from My CRM Manager.