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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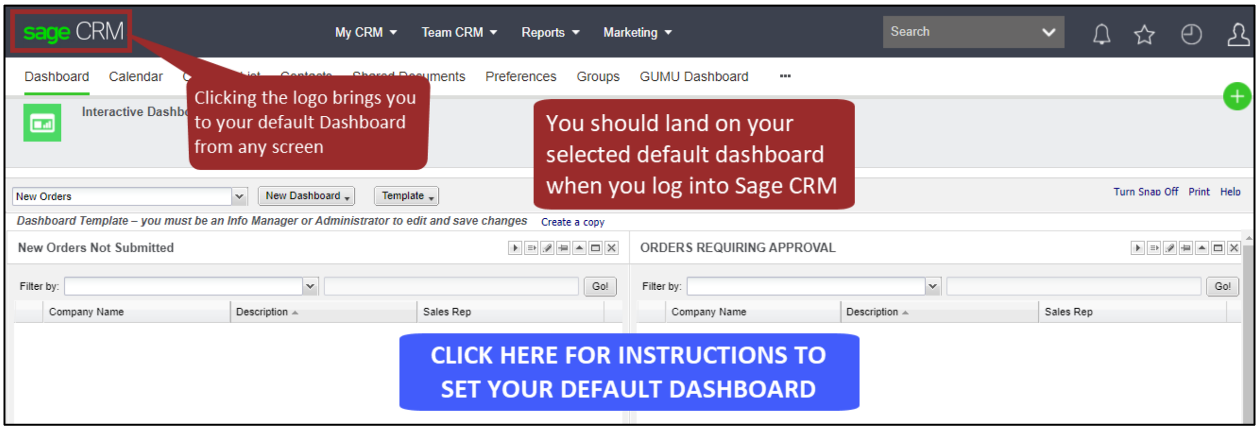
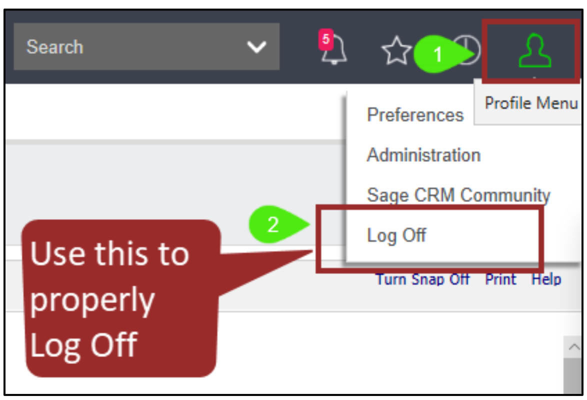
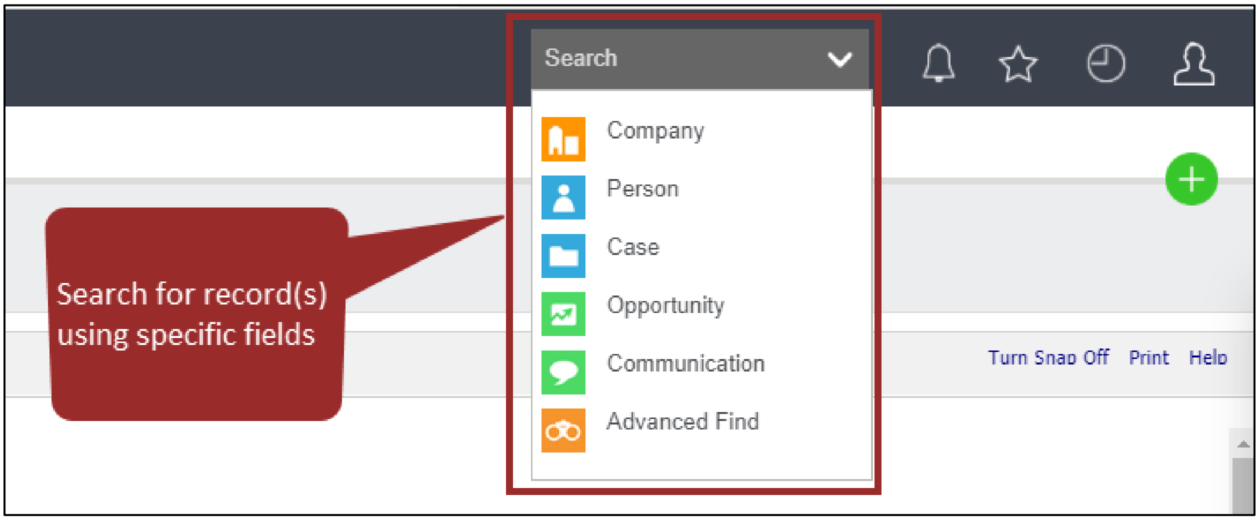
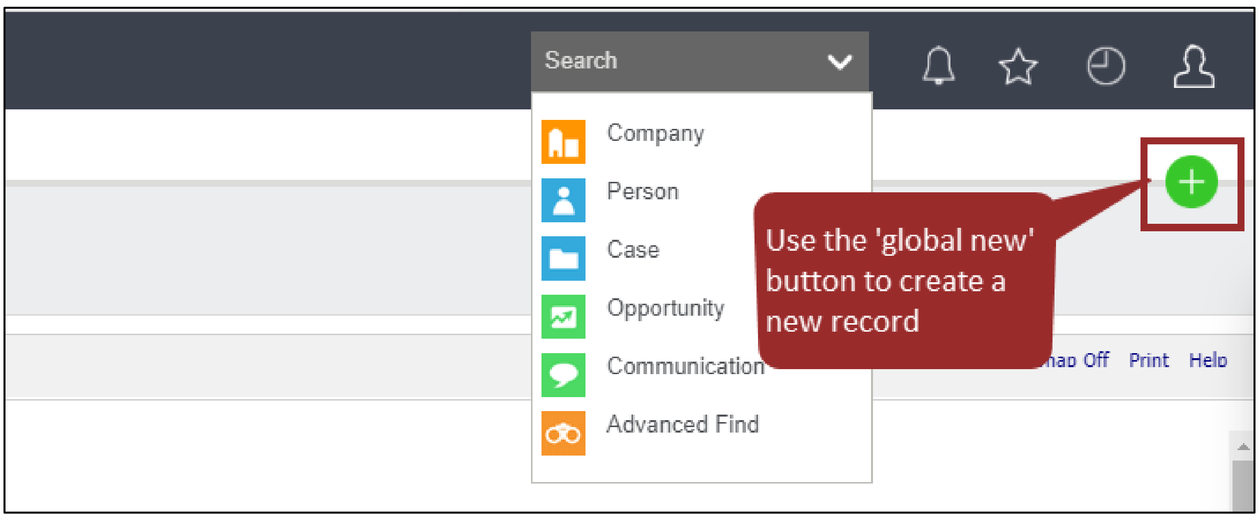
Accessing Sage CRM

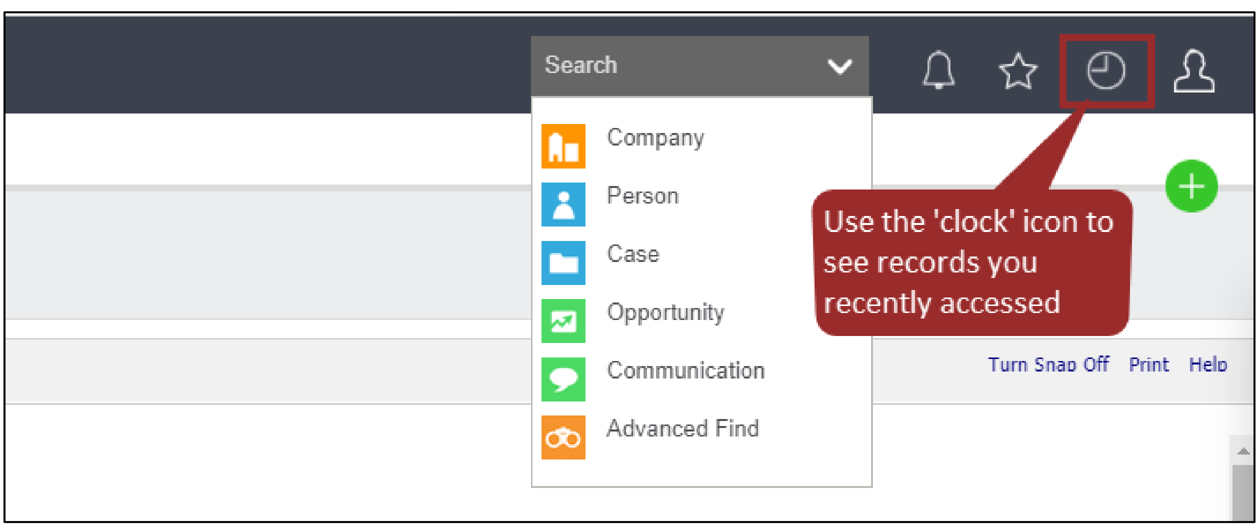
- **URL**: INSERT
- **User Name**: usually your first name – *not* case sensitive (confirm with your System Admin)
- **Password**: will be sent to you via email – *is* case sensitive (confirm with your System Admin)






Search
Company
Person
Case
Opportunity
Communication
Advanced Find
Search for record(s) using specific fields
Turn Snap Off
Print
Help


Search
Company
Person
Case
Opportunity
Communication
Advanced Find
Use the 'global new' button to create a new record
Print
Help


Search
Company
Person
Case
Opportunity
Communication
Advanced Find
Use the 'clock' icon to see records you recently accessed
Turn Snap Off
Print
Help

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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

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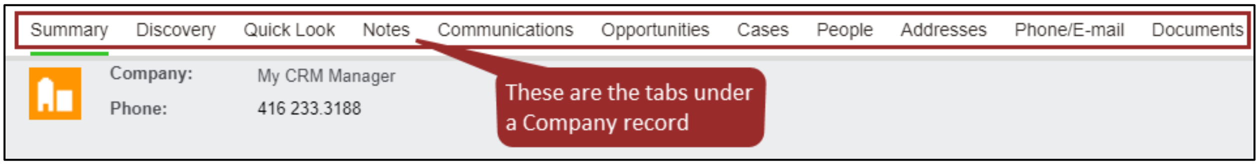
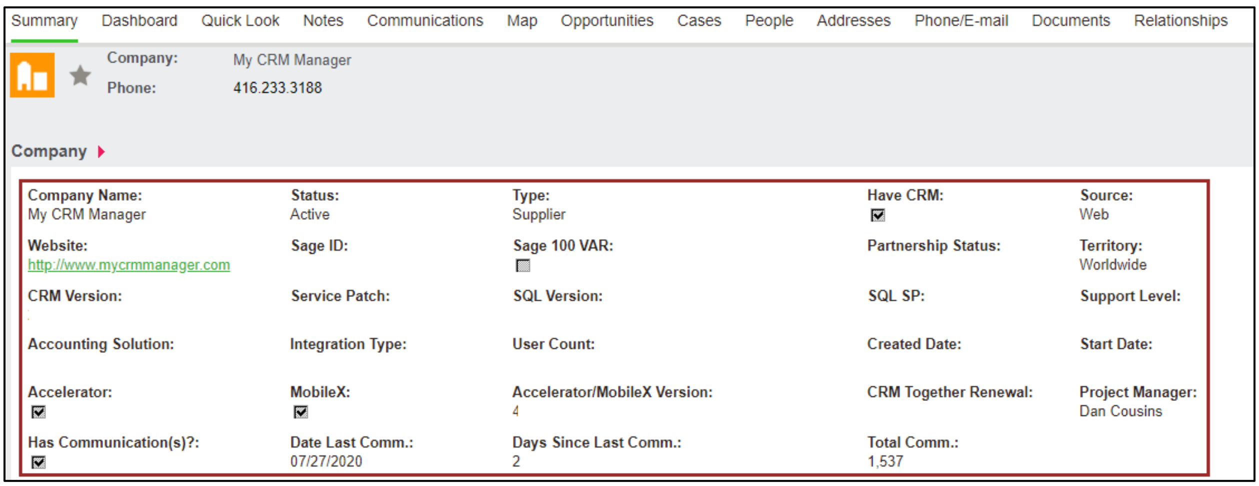
Screens & Lists

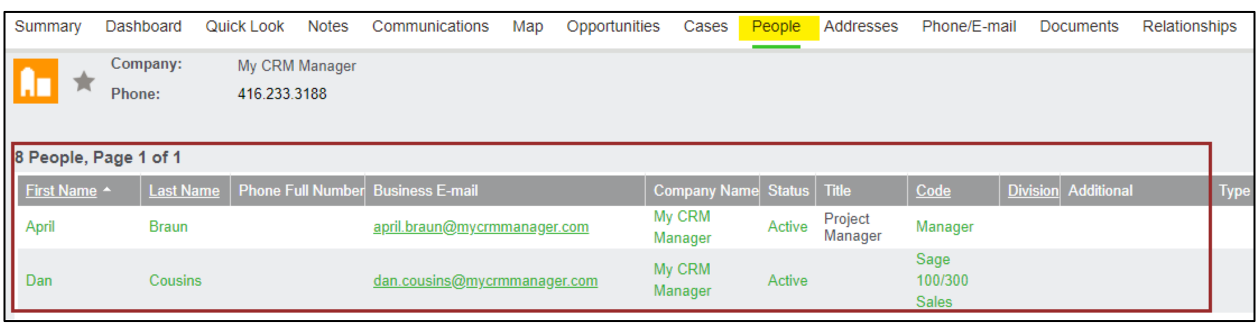
- **Tabs** are the various entities linked to each record and visible from any screen
  - The Summary tab is the primary screen you land on when going to a record



- **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)



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



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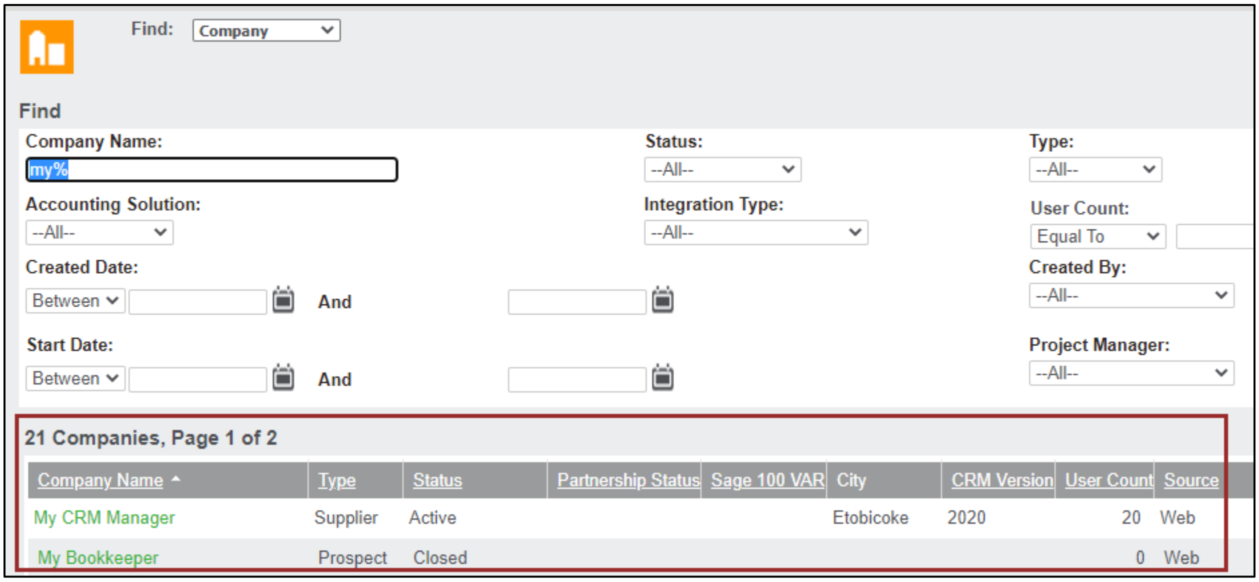
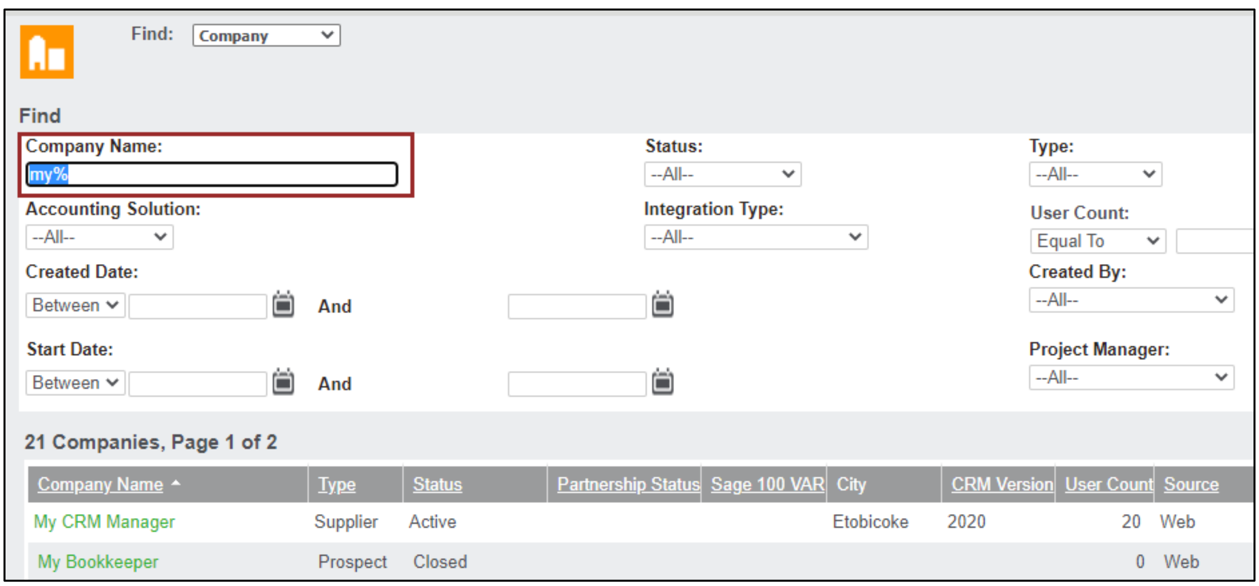
- **Find screens** allow you to find records for a specific entity based on the search criteria entered
  - **%** is the wildcard

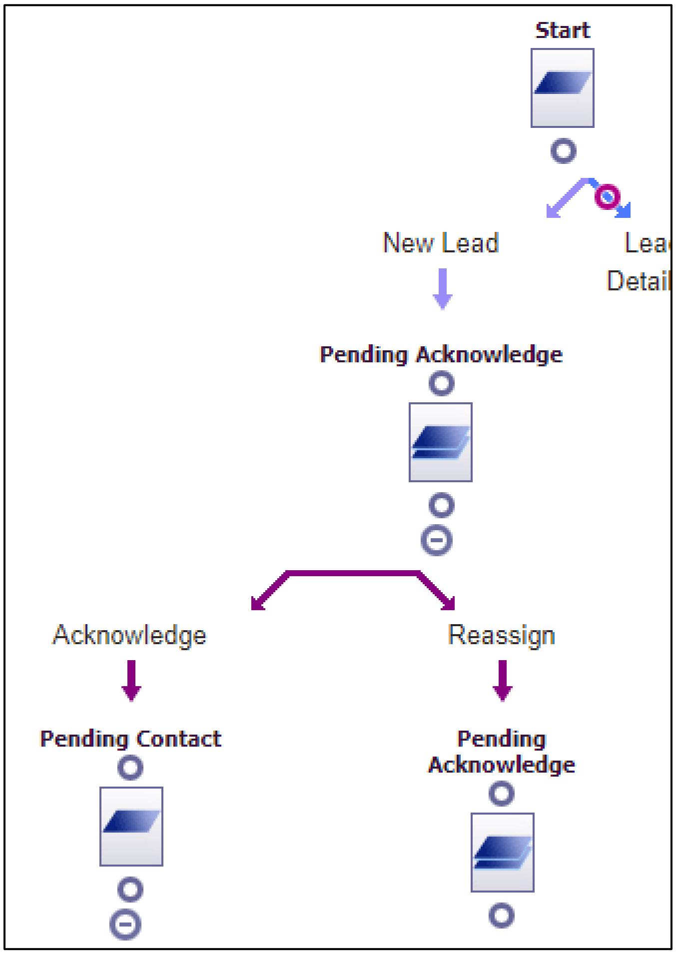


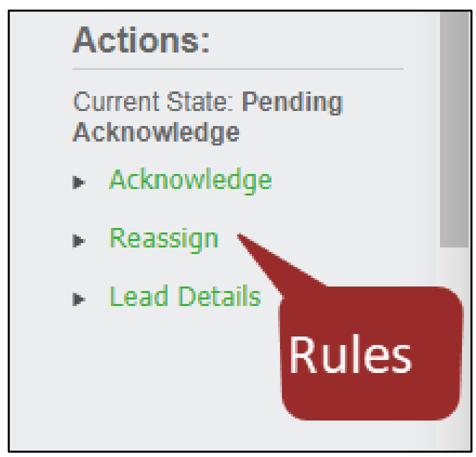
- **Grids** refer to the list of results of a search on the Find screen



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](#).

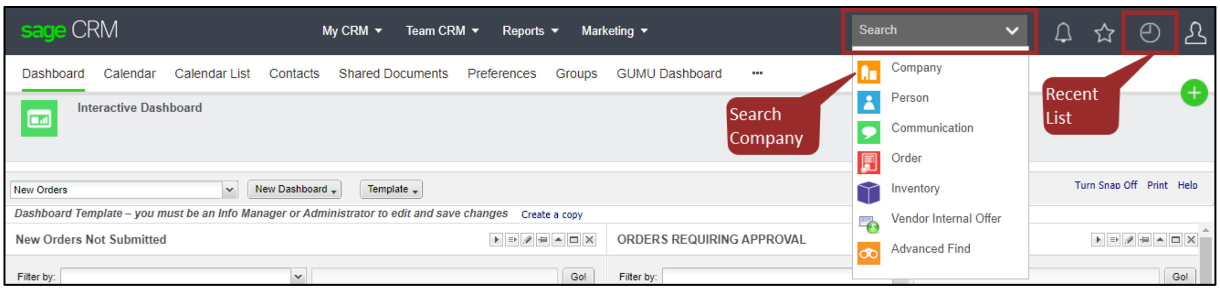


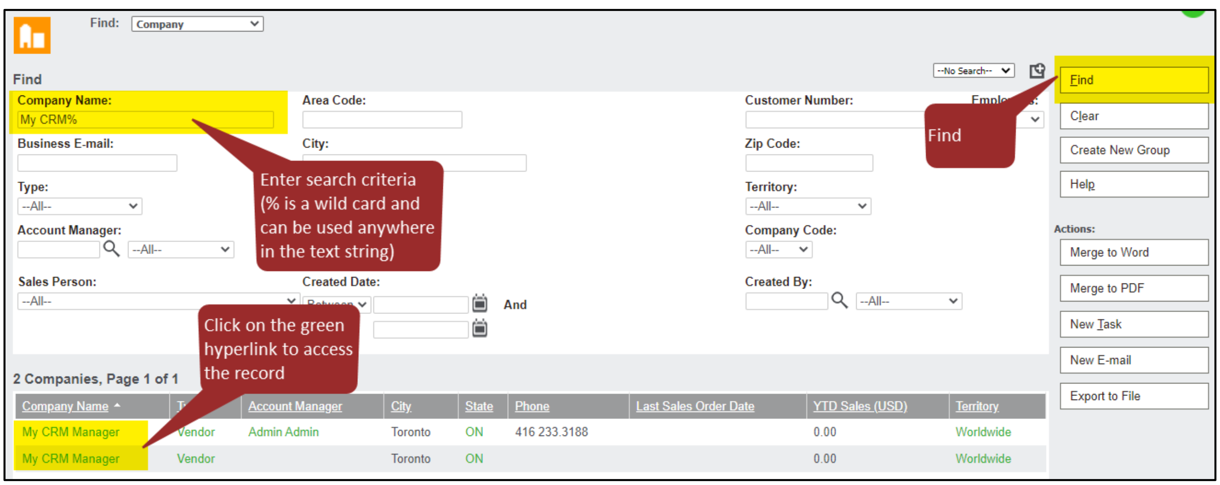


Key Entities of Sage CRM

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.





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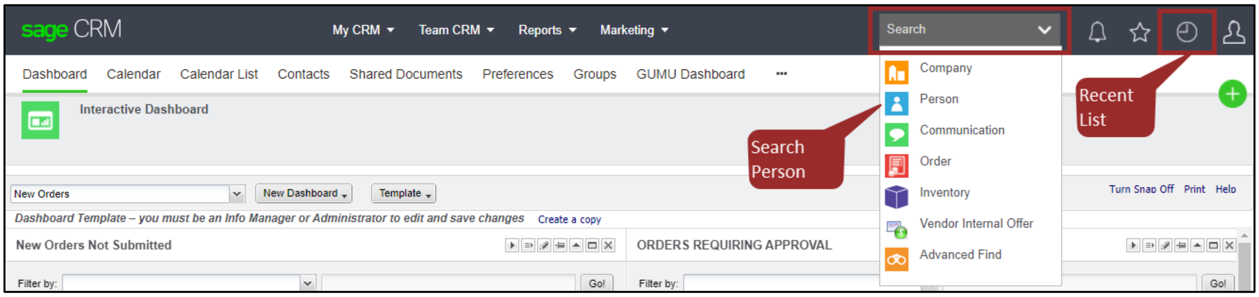
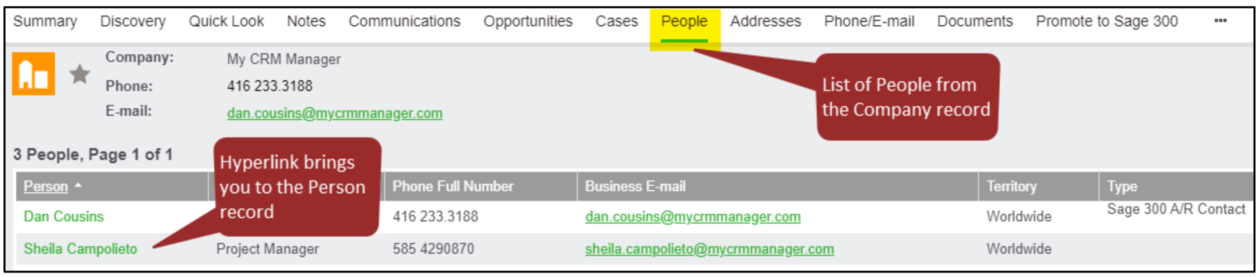
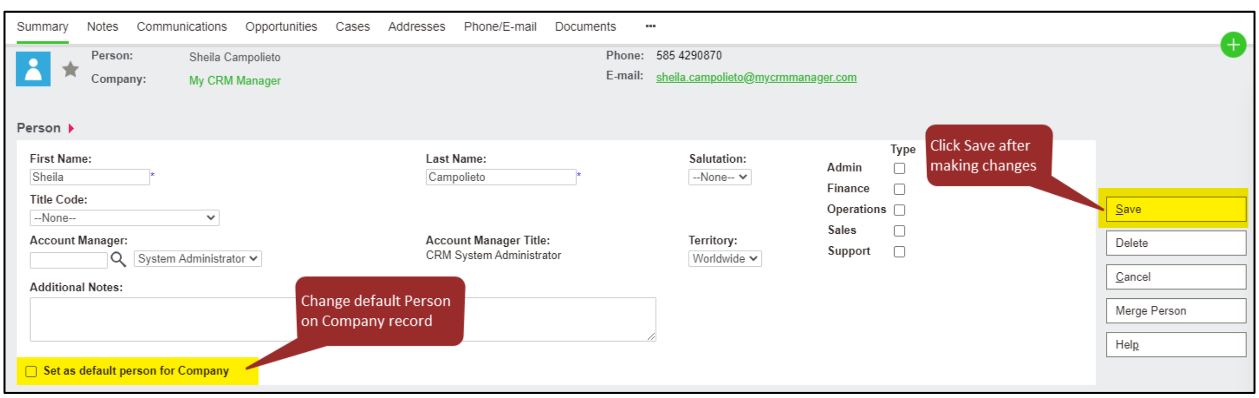
Person

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







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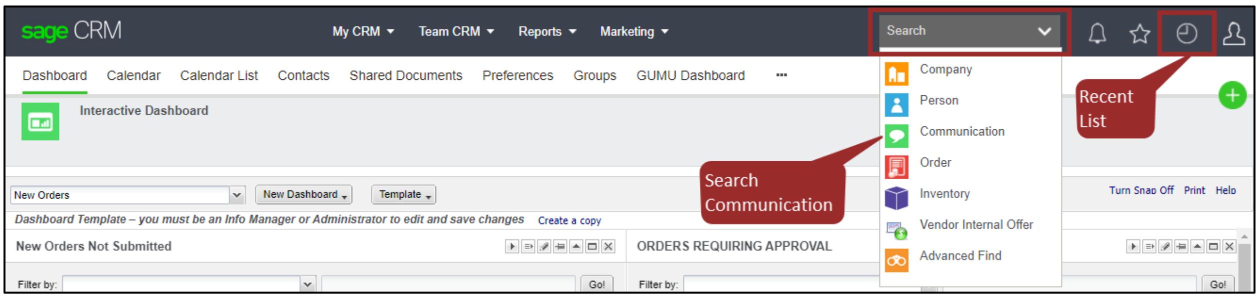
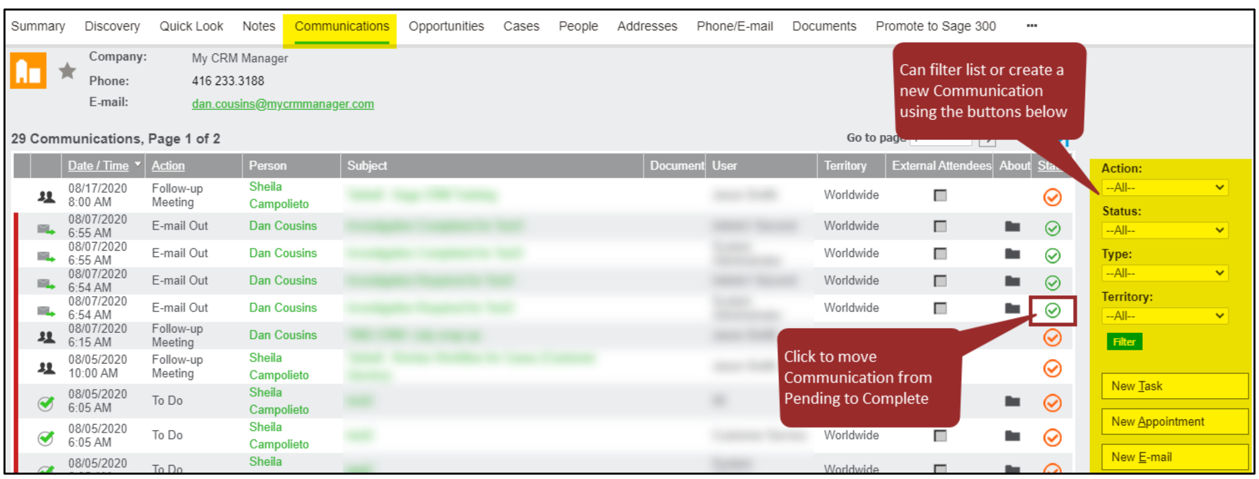
Communications

- 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](#).





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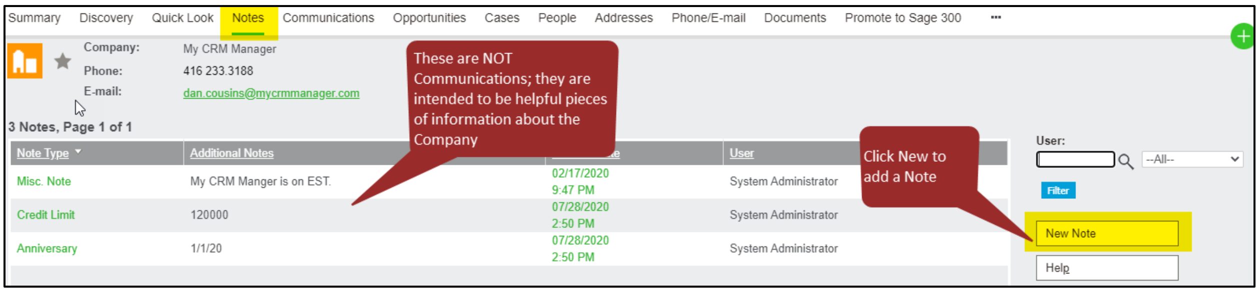
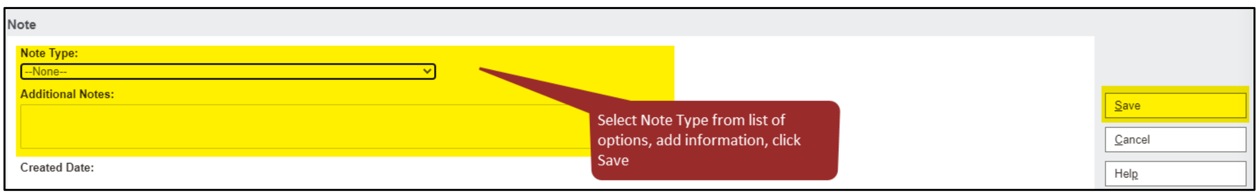
Notes

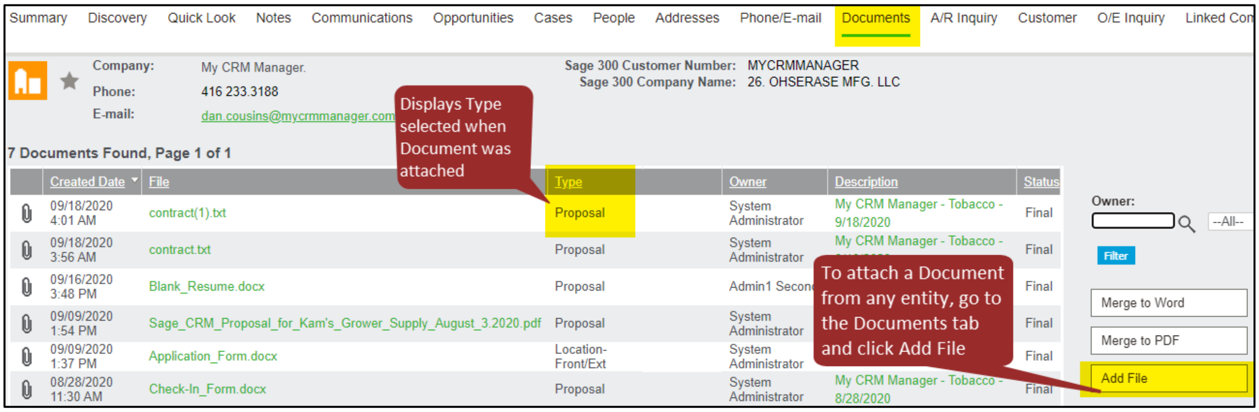
- A Note is information related to the specific entity (i.e. Company or Person); separate from Communication records.
- Notes are not reportable or searchable.

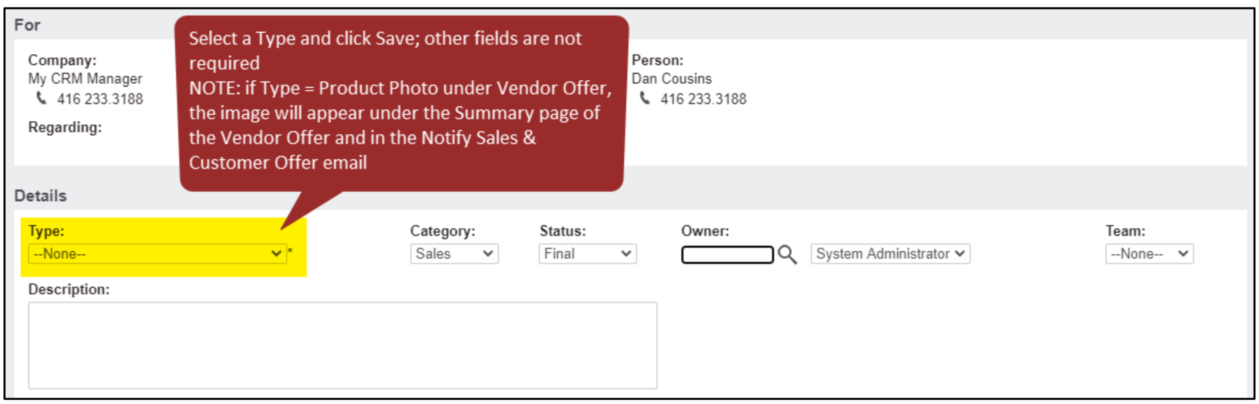


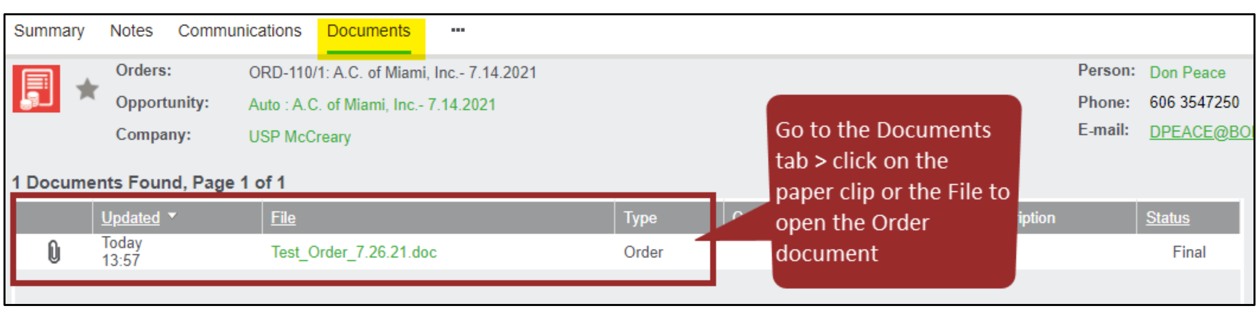


Documents

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







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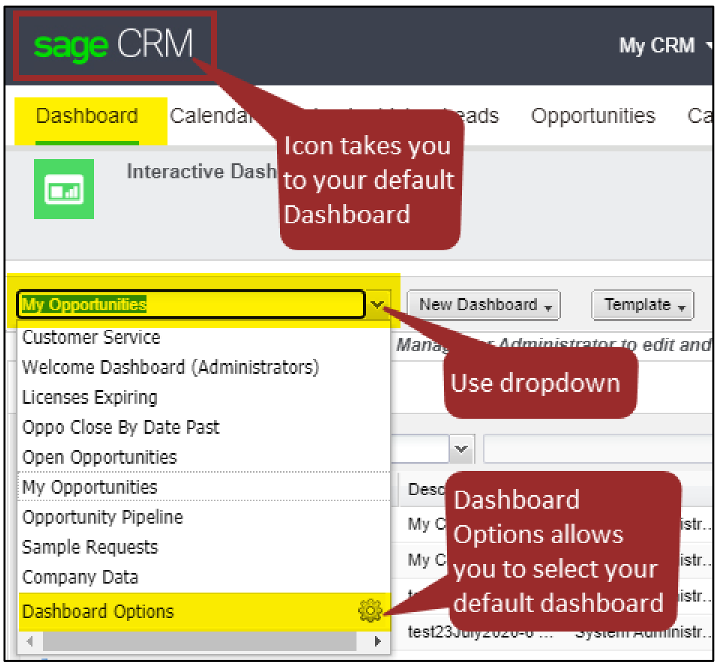
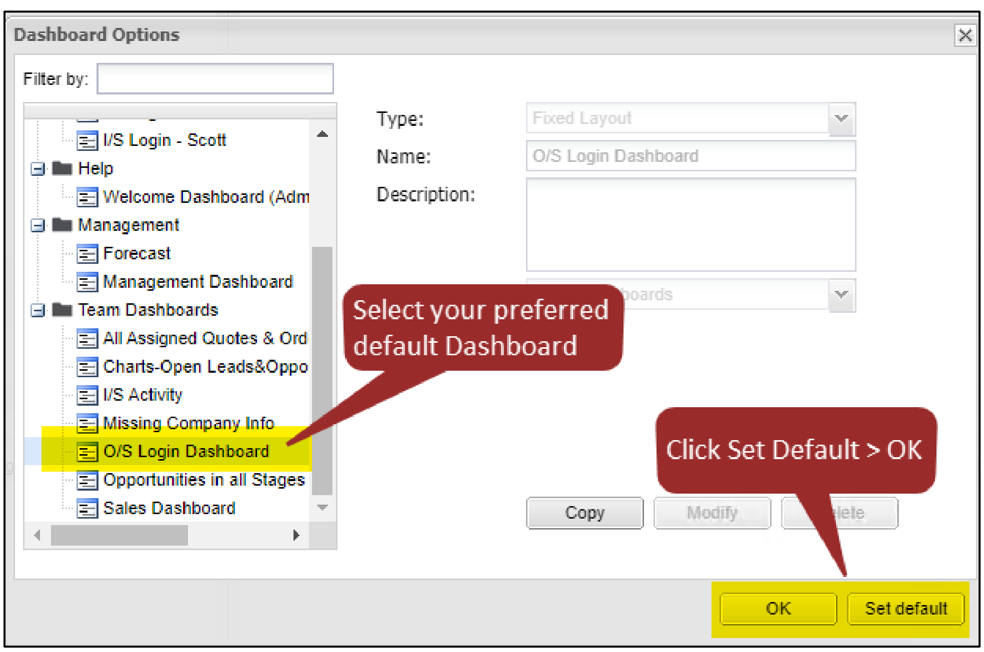
Dashboards and Gadgets

- **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





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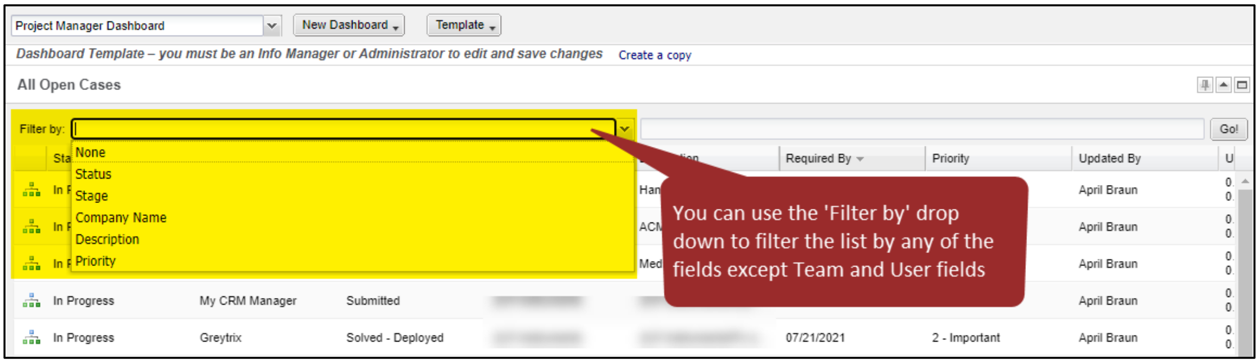

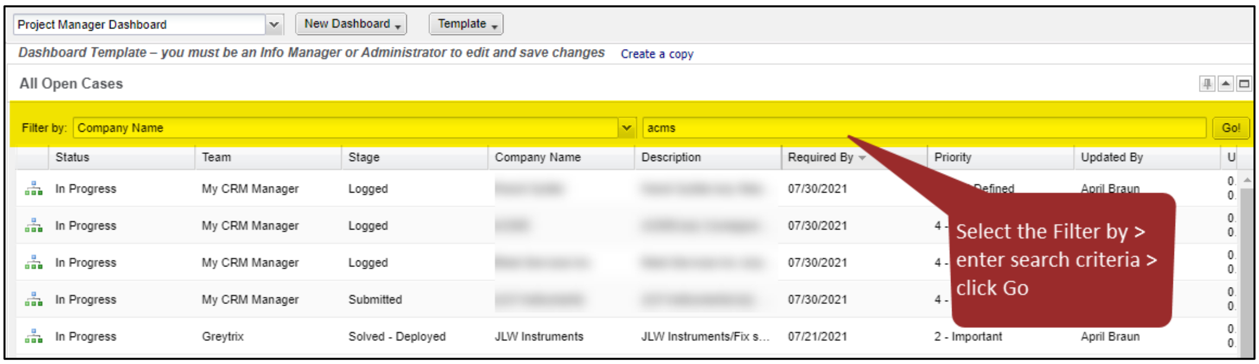

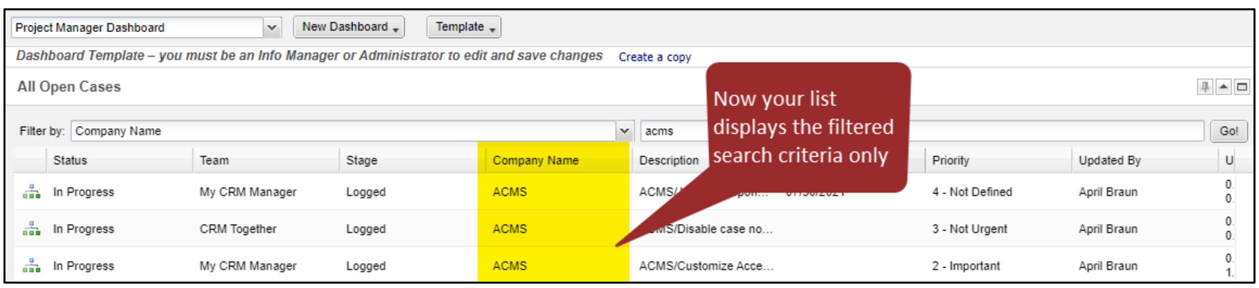

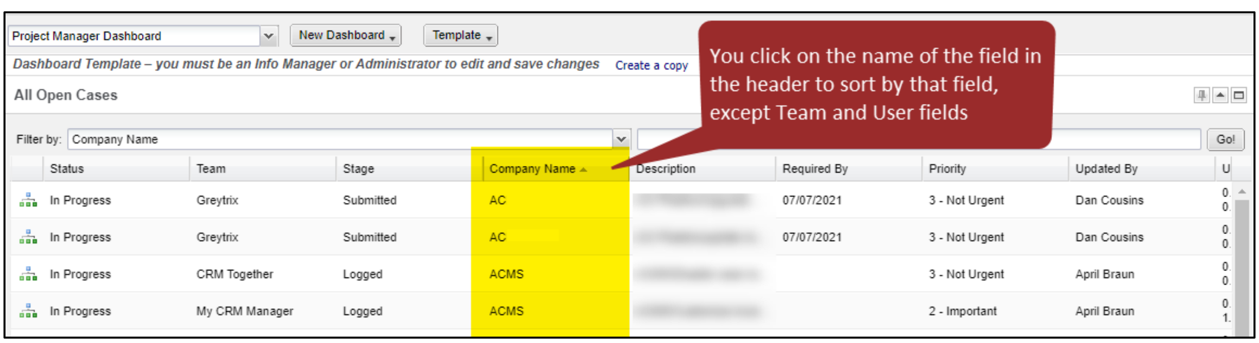

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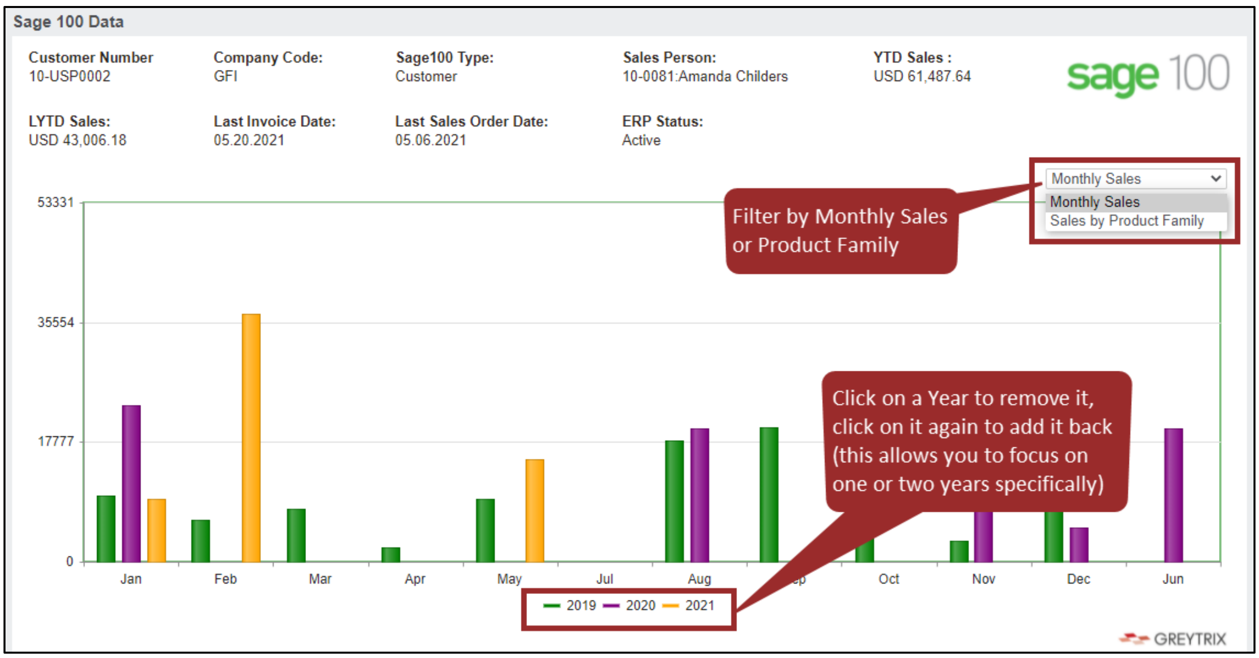
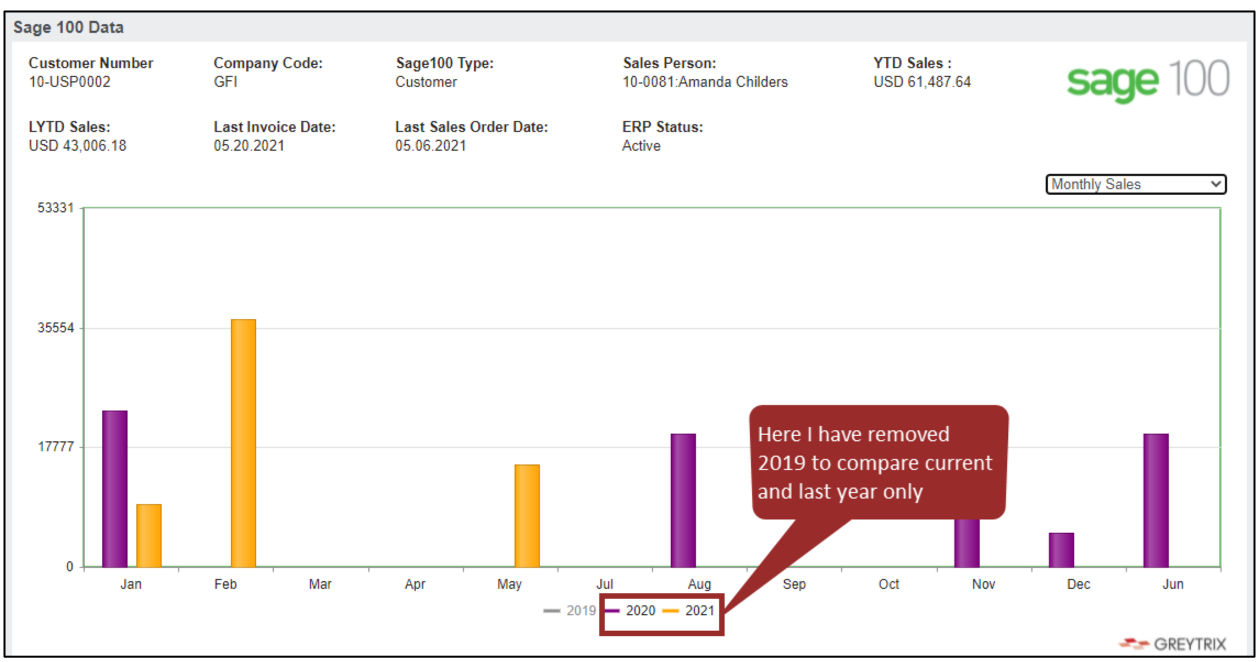
Sage 100

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





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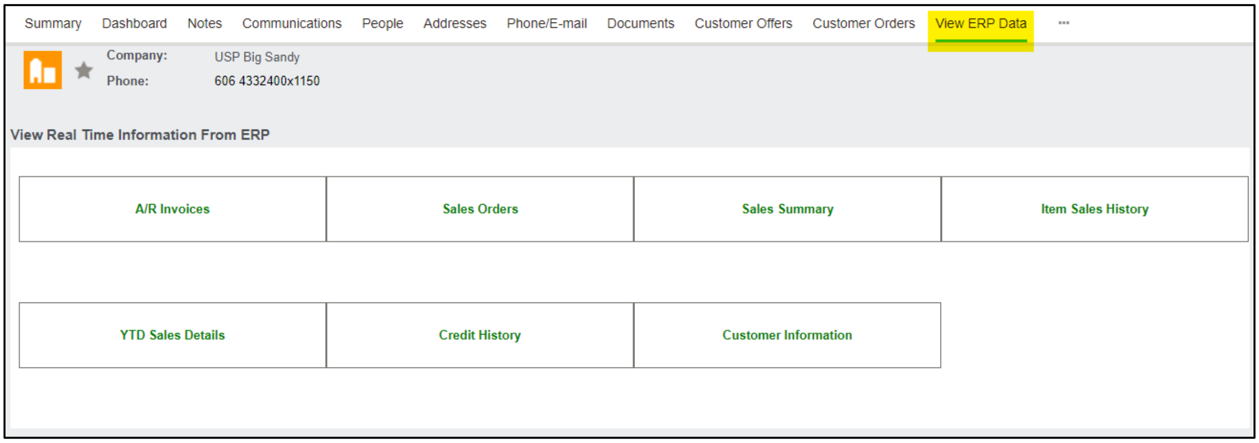
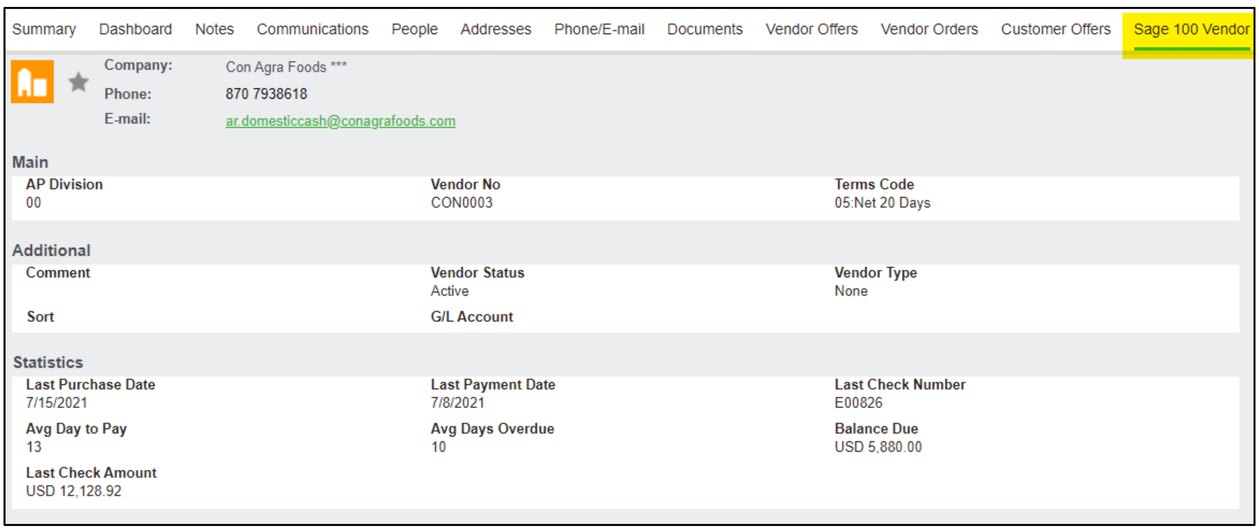
Customer Data



Vendor Data



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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.