CRMTogether

Accelerator for Sage CRM 4.7.5.4

User Manual

Technical Help file available at http://accelerator.crmtogether.com

Support Email: sagecrm@crmtogether.com
CRM TOGETHER Dublin, Ireland

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ACCELERATOR TASK PANE

When working in Outlook, at any time you can switch on the task pane to view your Sage CRM Data by selecting the Accelerator Lightening button from the Home Ribbon. In this scenario Accelerator is matching with the persons email ‘Marc Reidy’.

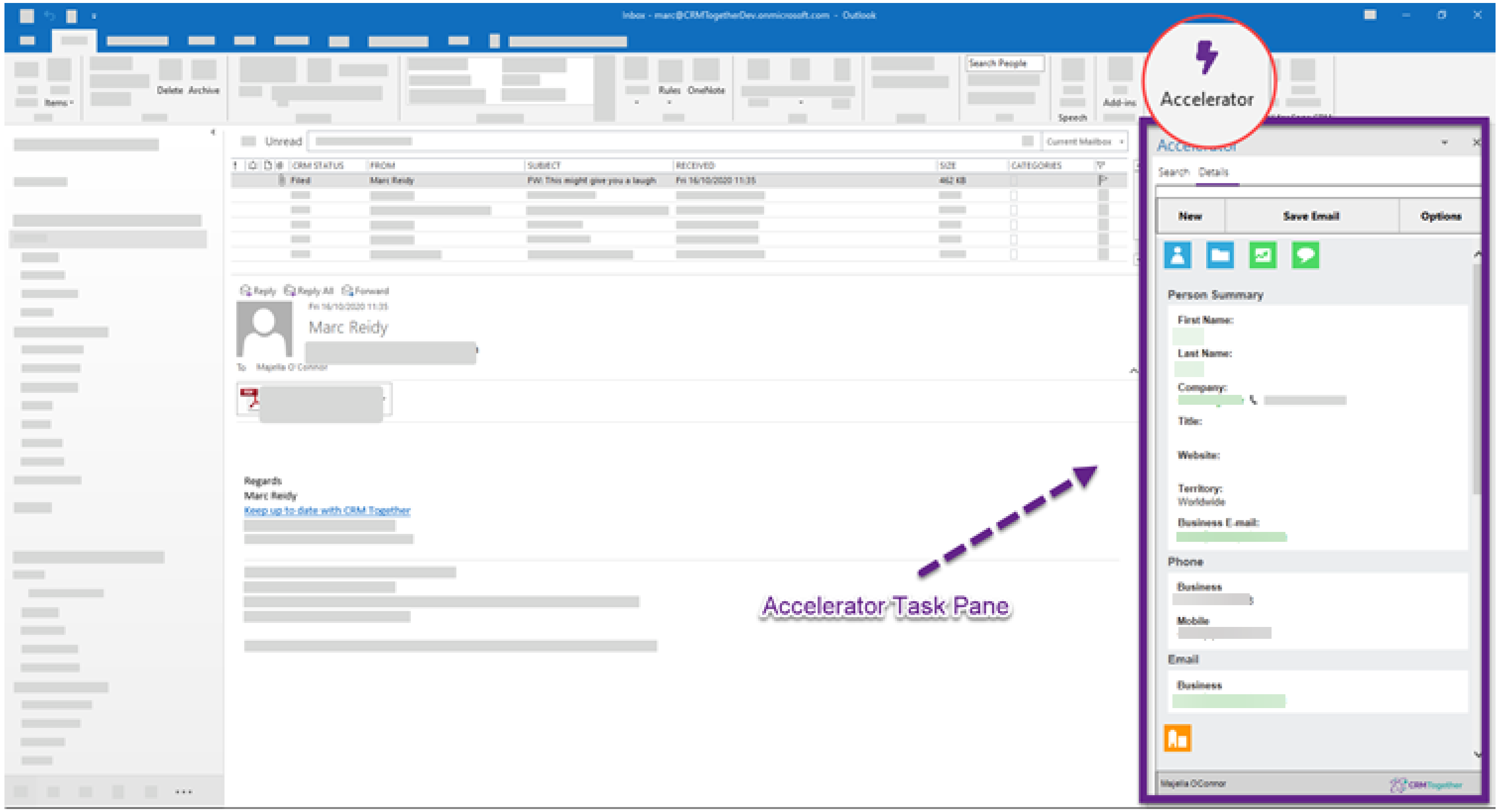

Figure 1 - Accelerator Task Pane

SAGE CRM CONTEXT

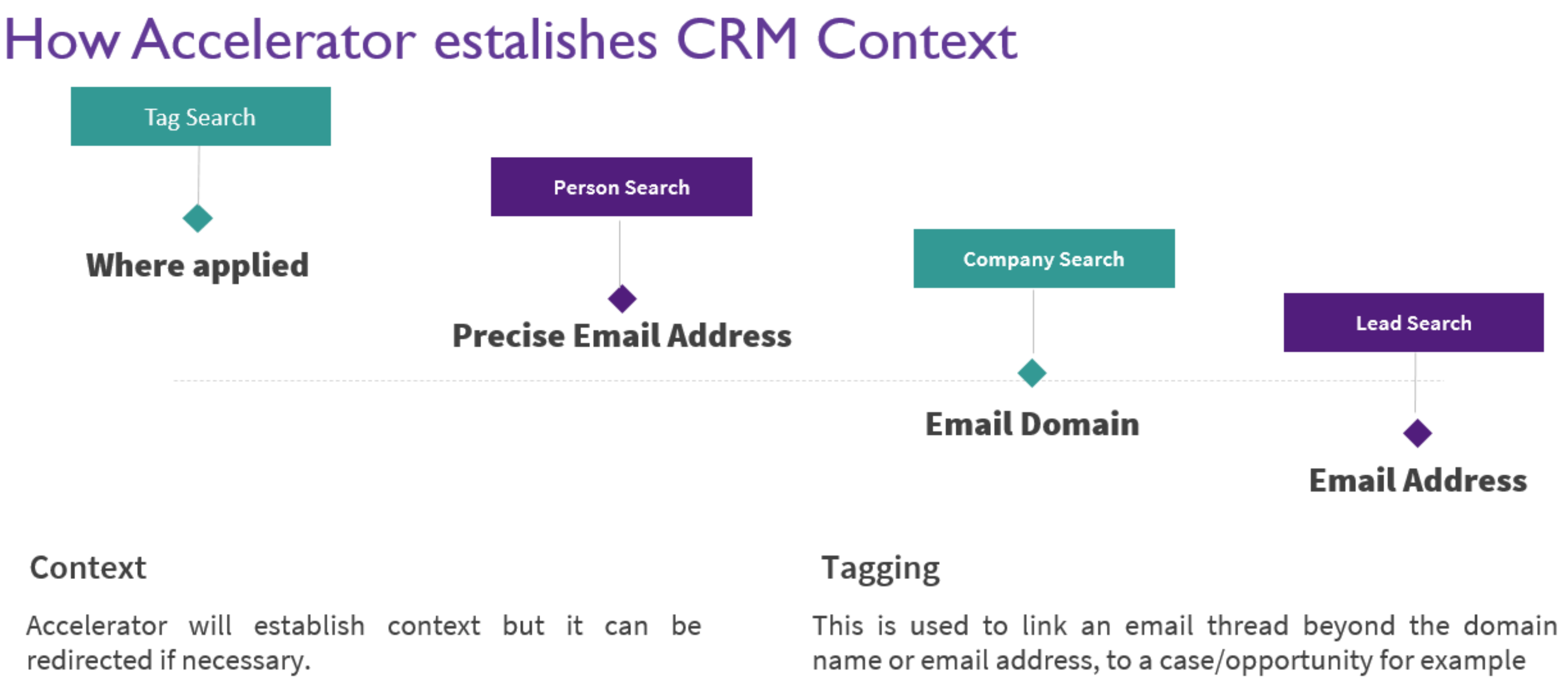

Figure 2 - Accelerator Context

CONTEXT BEHAVIOUR

When the Accelerator pane is turned on

- **Context** will be established by the email highlighted unless the search function of Accelerator is used.
  - Context can also be changed by navigating around your emails in any folder.
- **New** If a person's email is clicked on and Accelerator does not match the email address, it is possible to then select **New** and create a new person record in Sage CRM.
- **No Match:** If an email highlighted does not exist in the Sage CRM database at all, the Accelerator Task Pane will present an 'Add New Company Screen' automatically
- **Tags** If a tag is in use, Accelerator will display the record associated with the tag be that a case/opportunity/custom entity.

The proper storage of emails is essential to the efficient and productive use of your CRM data.

STRUCTURE

Within the Accelerator Task Pane there are 3 buttons with distinct functions – New, Save Email & Options

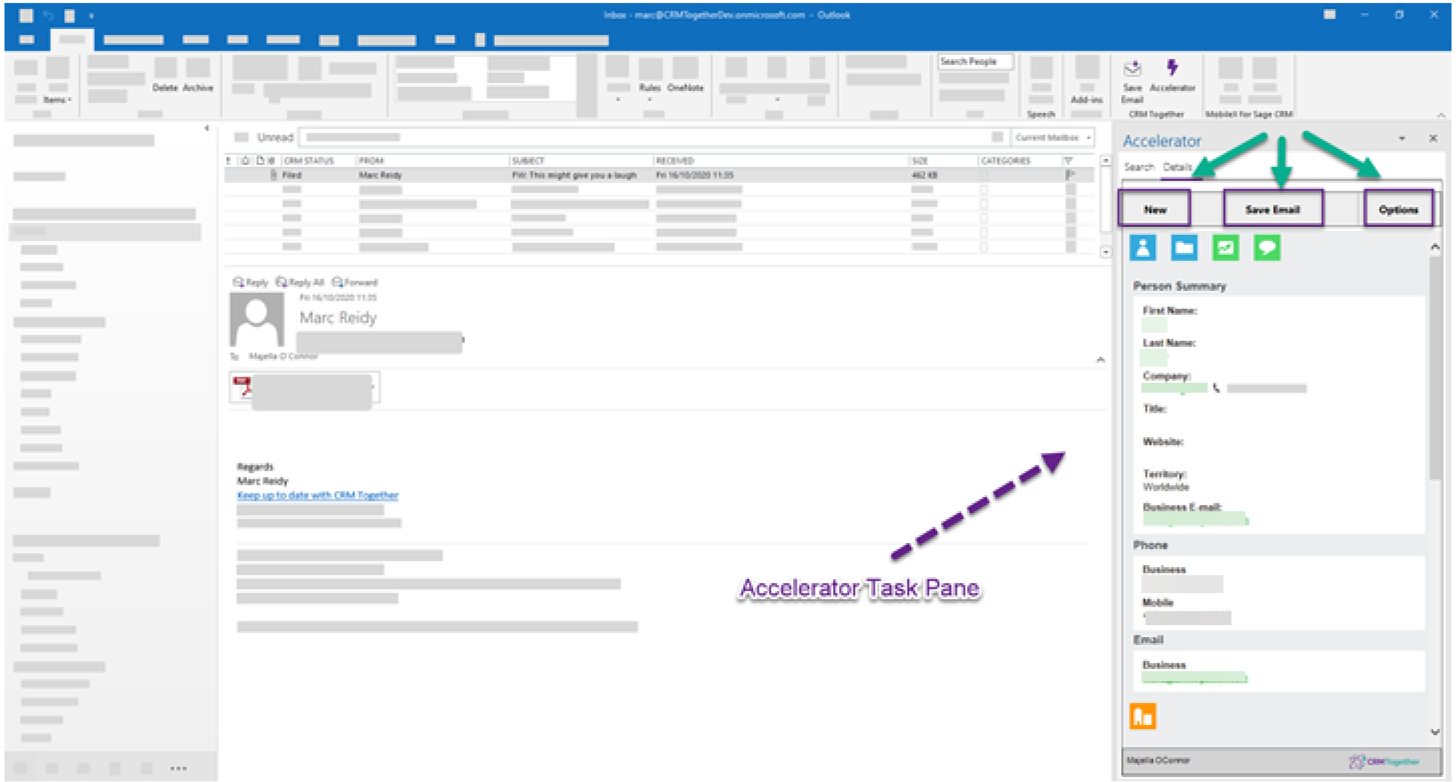

Figure 3 - Accelerator Task Pane Menus

DISPLAYING ADDITIONAL OUTLOOK FIELDS RELATED TO CRM

Figure 4 - CRM Fields Displayed

- Additional fields can be added to provide CRM context as indicated
- To add these field follow the instructions below
- Right-click the Menu headings, e.g. From/Subject select view settings
- Select columns to view those already visible
- On the dropdown select user defined fields
- Add any fields of interest e.g CRM Filed By
- Change the order as you deem necessary using, Move Up or Move Down buttons on the right side

Please note: This status field is only displayed in the Microsoft Outlook Pro email folder after the first email has been saved/stored in CRM and is then available for setup as described above. The column setup must be done manually for each desired email folder. The status information is also shared with others within your organization who have received the stored email. This also applies to those within your organization who have been forwarded a stored email.

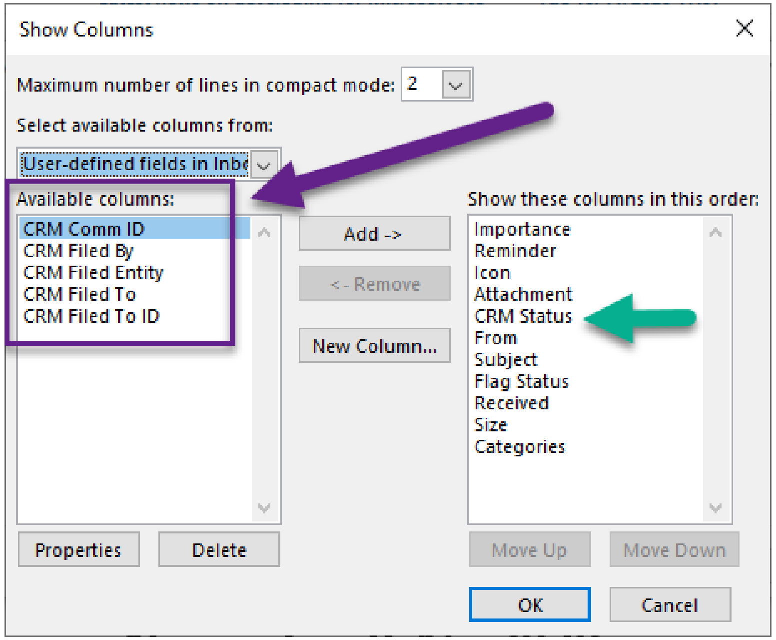

Figure 5 - New Column displaying CRM Status

NAVIGATING THE ACCELERATOR TASK PANE

Context Specific Information Displayed

Depending on the selected entity, various information menus are available. (**These menus are customizable**)

The Accelerator information icons display related information within Accelerator and offer interactive functionality without having to exit MS Outlook.

Data fields in green lettering indicate a hyperlink to an executable function (e.g., website, email, phone call) or the corresponding entry in Sage CRM.

In the example shown here, we have selected the entity **Company** and can see the CRM screen: Company Summary.

Additional information can be navigated against the company as follows

- Company Cases
- Company Opportunities
- Company Communications
- Company Personnel

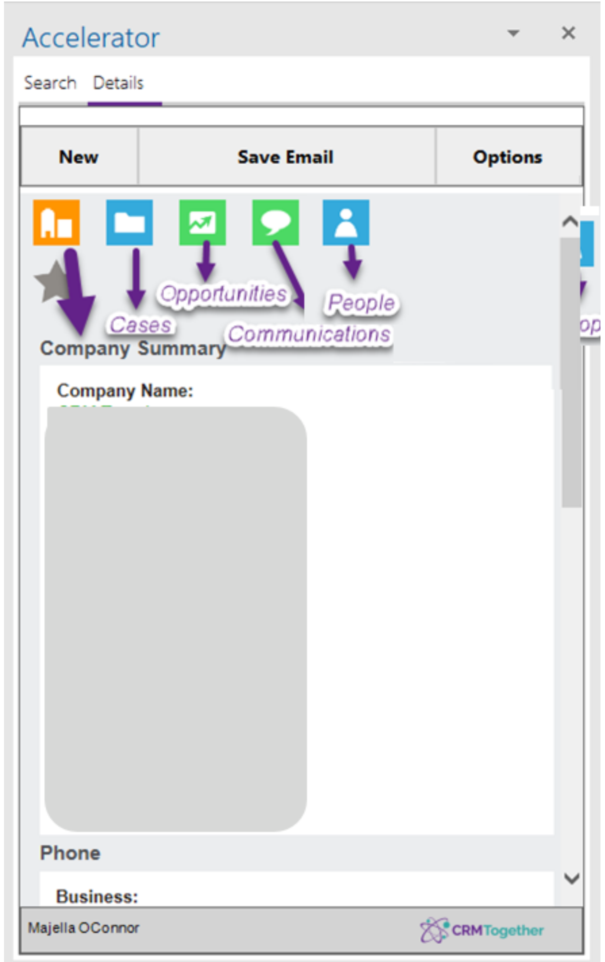

Figure 6 - Company Information

By selecting the icon: People, a list of persons associated with a company appears as per Figure 7.

When a person is selected by clicking the person icon, the display screen switches to the Person Summary and the appropriate information is displayed accordingly.

In our example, the CRM context is now the selected person Joe Bloggs at Company CRM Together

The icons displayed will now reflect any cases, opportunities or communications associated with Joe Bloggs.

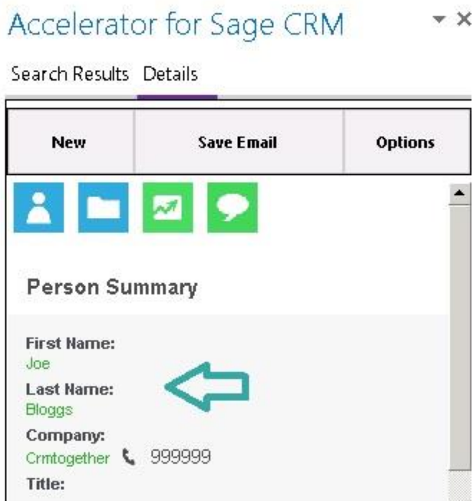

Figure 8 - Person Details

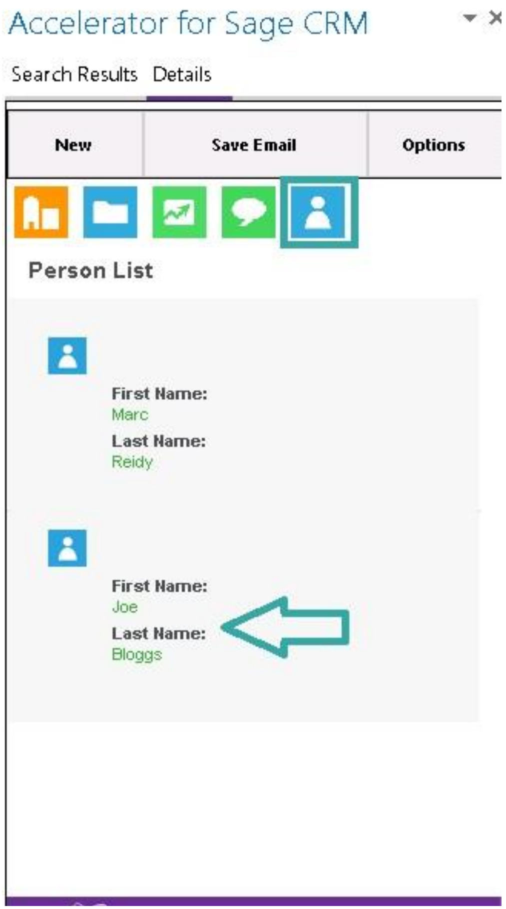

Figure 7 - Viewing People Associated with a Company

NEW

This Menu can be customised. Out of the box Accelerator ships with all standard Sage CRM entities

- New Company
- New Person
- New Lead
- New Case
- New Opportunity

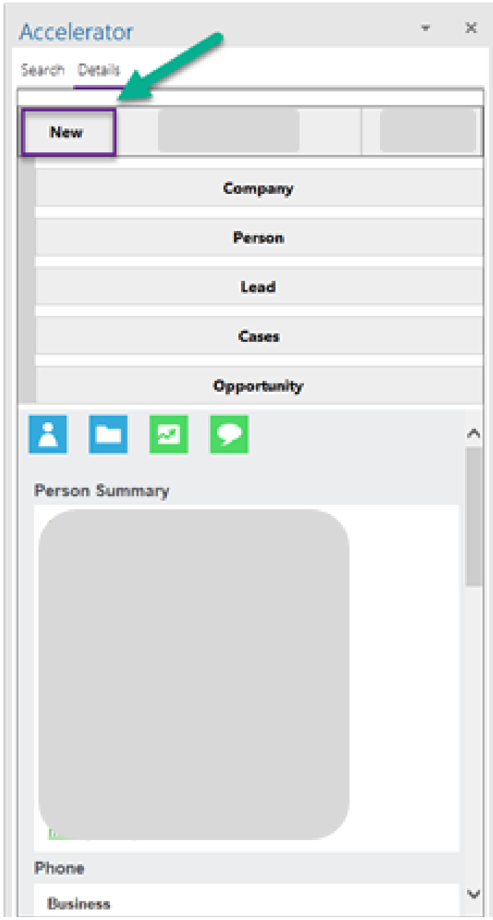

Figure 9 - Accelerator 'New Menu' Options

COMPANY

If the new company being entered is based upon an email, Accelerator will endeavour to screen scrape as much info as it can i.e.

- Company Name (Based upon the email domain)
- Website (Based upon the email domain)
- First Name (Based upon the email address)
- Last Name (Based upon the email address)
- Phone Number & Postal Address (if there is one in the body of the email)
- Email Address (based upon the email selected)

All fields can be edited if screen scraped incorrectly or if it is a new company not actually relevant to an email selected All other Sage CRM fields will be fed from the relevant Company screen/fields in Sage CRM, but the appearance can be customised within Accelerator

PERSON

If the new person being entered is based upon an email, Accelerator will endeavour to screen scrape as much info as it can i.e.

- Company Name (has already been recognised from the email domain name)
- Website (Based upon the email domain)
- First Name (Based upon the email address)
- Last Name (Based upon the email address)
- Phone Number (if there is one in the body of the email)
- Email Address (based upon the email selected)
- Postal Address (if there is one in the body of the email)

All fields can be edited if screen scraped incorrectly

All other Sage CRM fields will be fed from the relevant Person screen/fields in Sage CRM, but the appearance can be customised within Accelerator

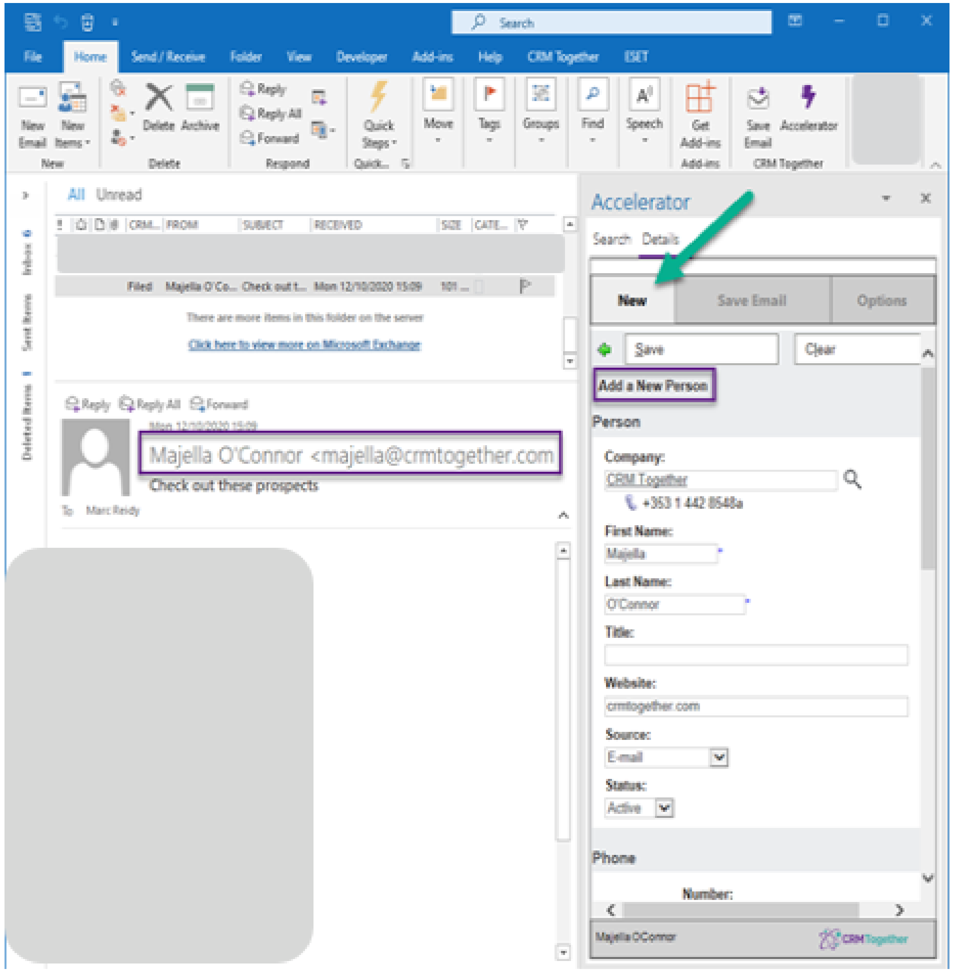

Figure 10 - Accelerator - Create New Person Record

LEAD

If the new lead being entered is based upon an email, Accelerator will endeavour to screen scrape as much info as it can i.e.

- Company Name (has already been recognised from the email domain name)
- Lead Description (populated from the email subject)
- Lead Details (populated from the body of the email
- Website (Based upon the email domain)
- First Name (Based upon the email address)
- Last Name (Based upon the email address)
- Email Address (based upon the email selected)

All fields can be edited if screen scraped incorrectly

All other Sage CRM fields will be fed from the relevant Lead screen/fields in Sage CRM, but the appearance can be customised within Accelerator

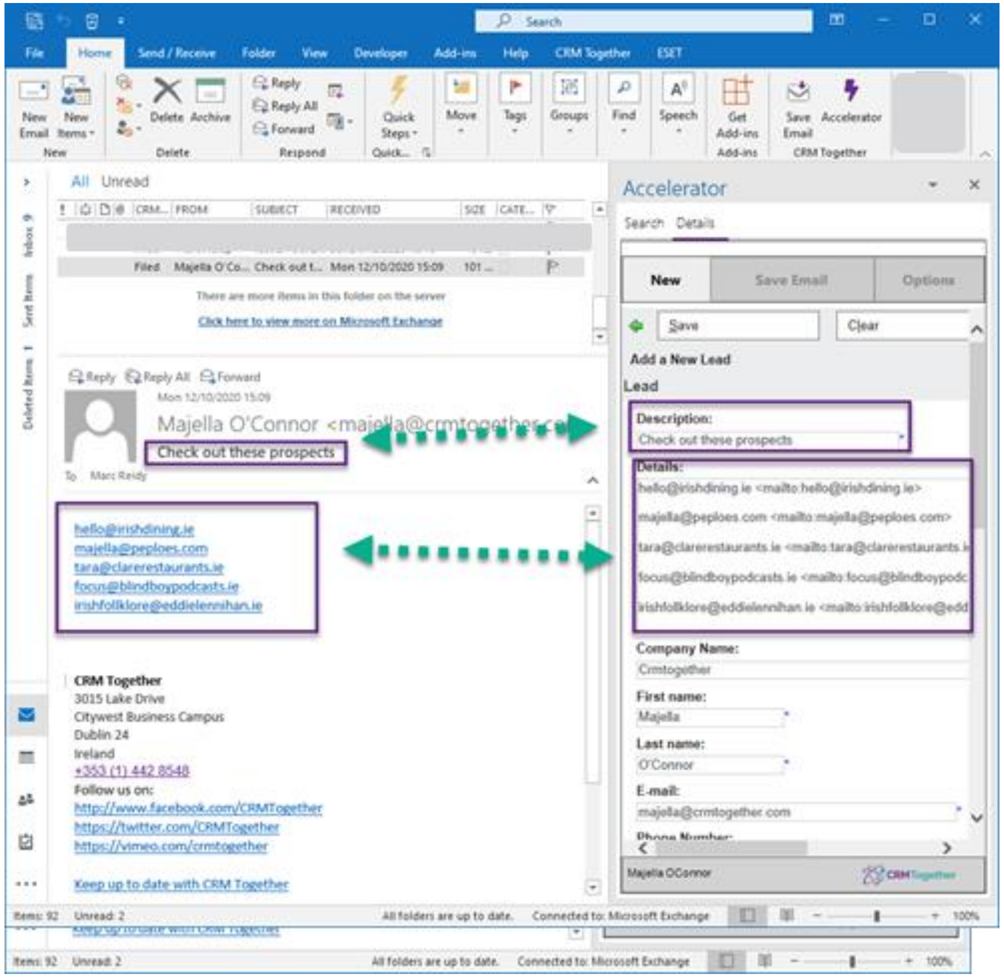

Figure 11 - Accelerator New Lead

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OPPORTUNITY

If the new opportunity being entered is based upon an email, Accelerator will endeavour to screen scrape as much info as it can i.e.

- Company Name (has already been recognised from the email domain name)
- Opportunity Description (populated from the email subject)
- Opportunity Details (populated from the body of the email
- Website (Based upon the email domain)
- First Name (Based upon the email address)
- Last Name (Based upon the email address)
- Email Address (based upon the email selected)

All fields can be edited if screen scraped incorrectly

All other Sage CRM fields will be fed from the relevant Opportunity screen/fields in Sage CRM, but the appearance can be customised within Accelerator

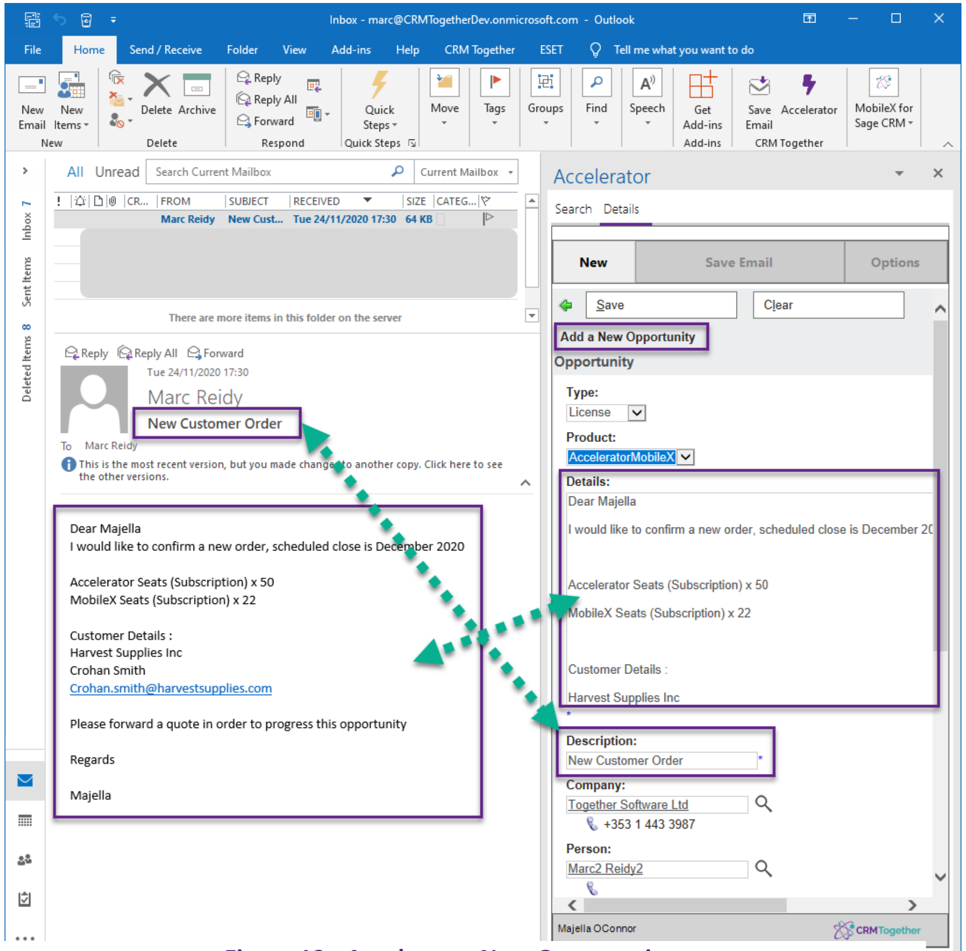


Figure 12 - Accelerator New Opportunity

CASE

If the new case being entered is based upon an email, Accelerator will endeavour to screen scrape as much info as it can i.e.

- Company Name (has already been recognised from the email domain name)
- Case Description (populated from the email subject)
- Problem Details (populated from the body of the email
- First Name (Based upon the email address)
- Last Name (Based upon the email address)
- Email Address (based upon the email selected)

All fields can be edited if screen scraped incorrectly

All other Sage CRM fields will be fed from the relevant Case screen/fields in Sage CRM, but the appearance can be customised within Accelerator

CUSTOM ENTITY

If a custom entity is in play, it will assume the same process of a 'New' Screen with matching fields from the Sage CRM instance used.

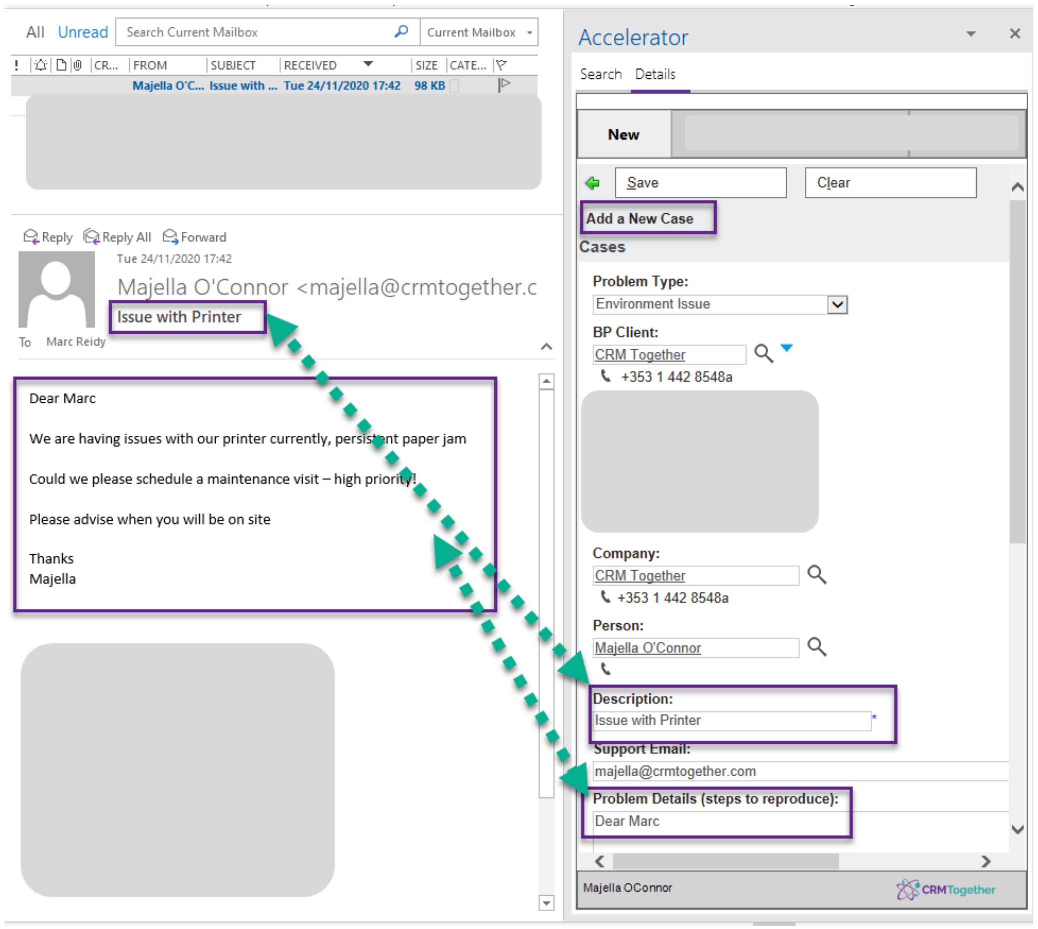


Figure 13 - Accelerator New Case

SAVE EMAIL

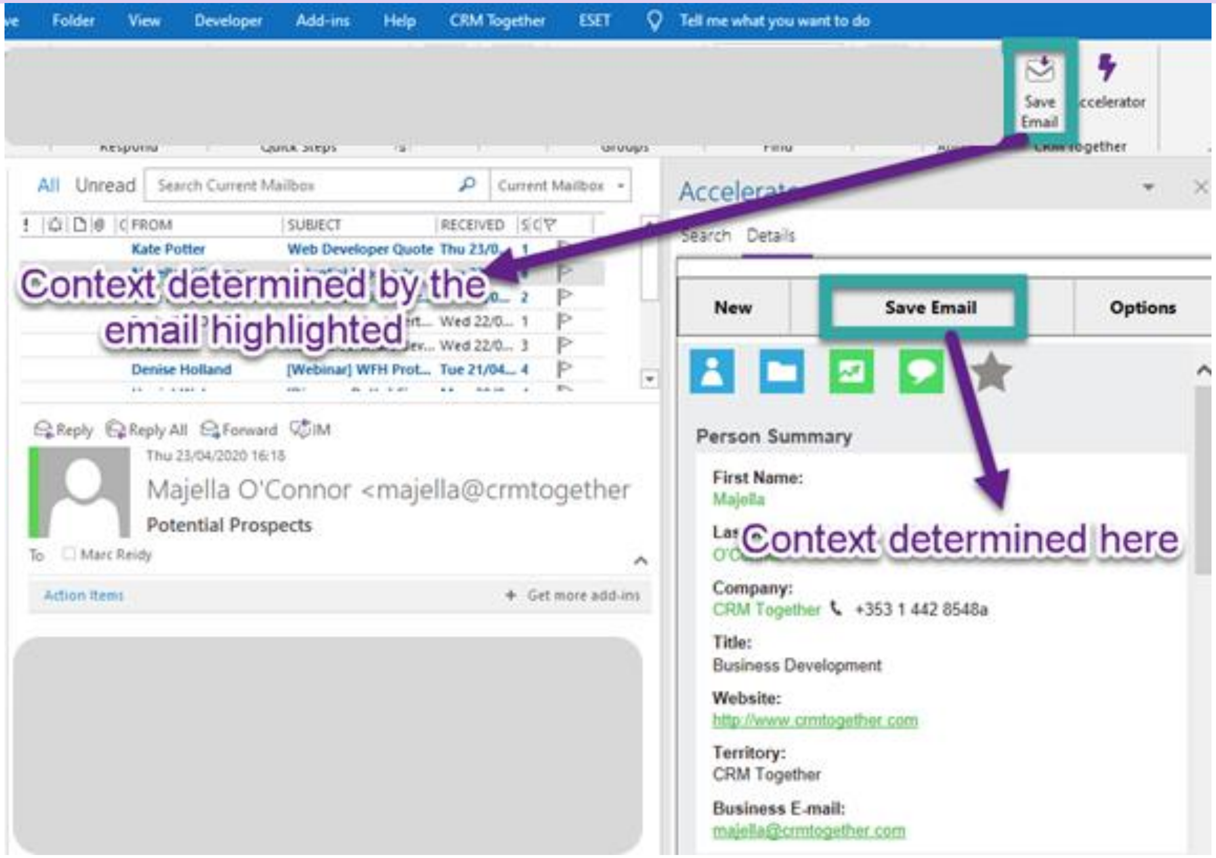


Figure 14 - Save Email Options

OPTION 1 – HOME RIBBON 'SAVE EMAIL'

To select 'Save Email' from the ribbon will save based upon the context of the email selected at the time e.g.

- Against a person if the email is in CRM
- Against a company if the email domain is recognised but not the person
- If there is a tag in play against the entity specified i.e. case or opportunity
- If no context is established against the user who is logged in at the time

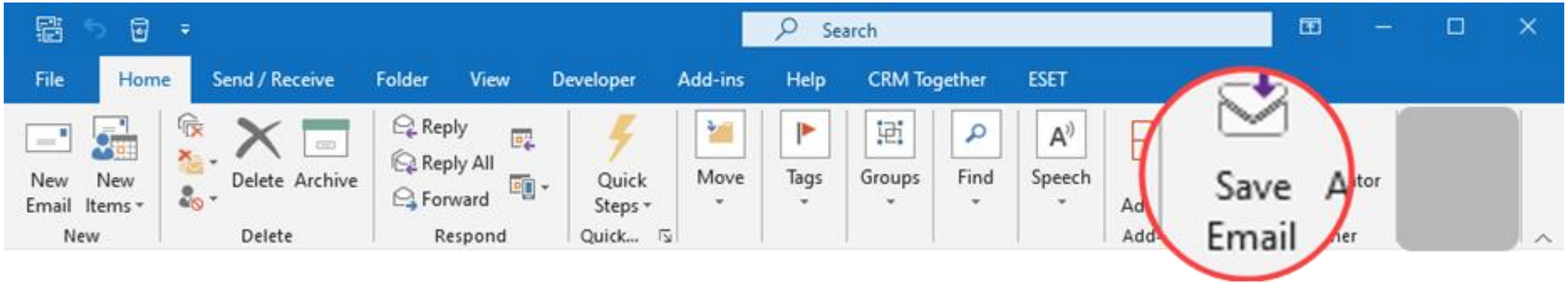


Figure 15 - Accelerator Home Ribbon

In settings, the 'email save prompt' is turned on by default, this will confirm where the email will be filed as below

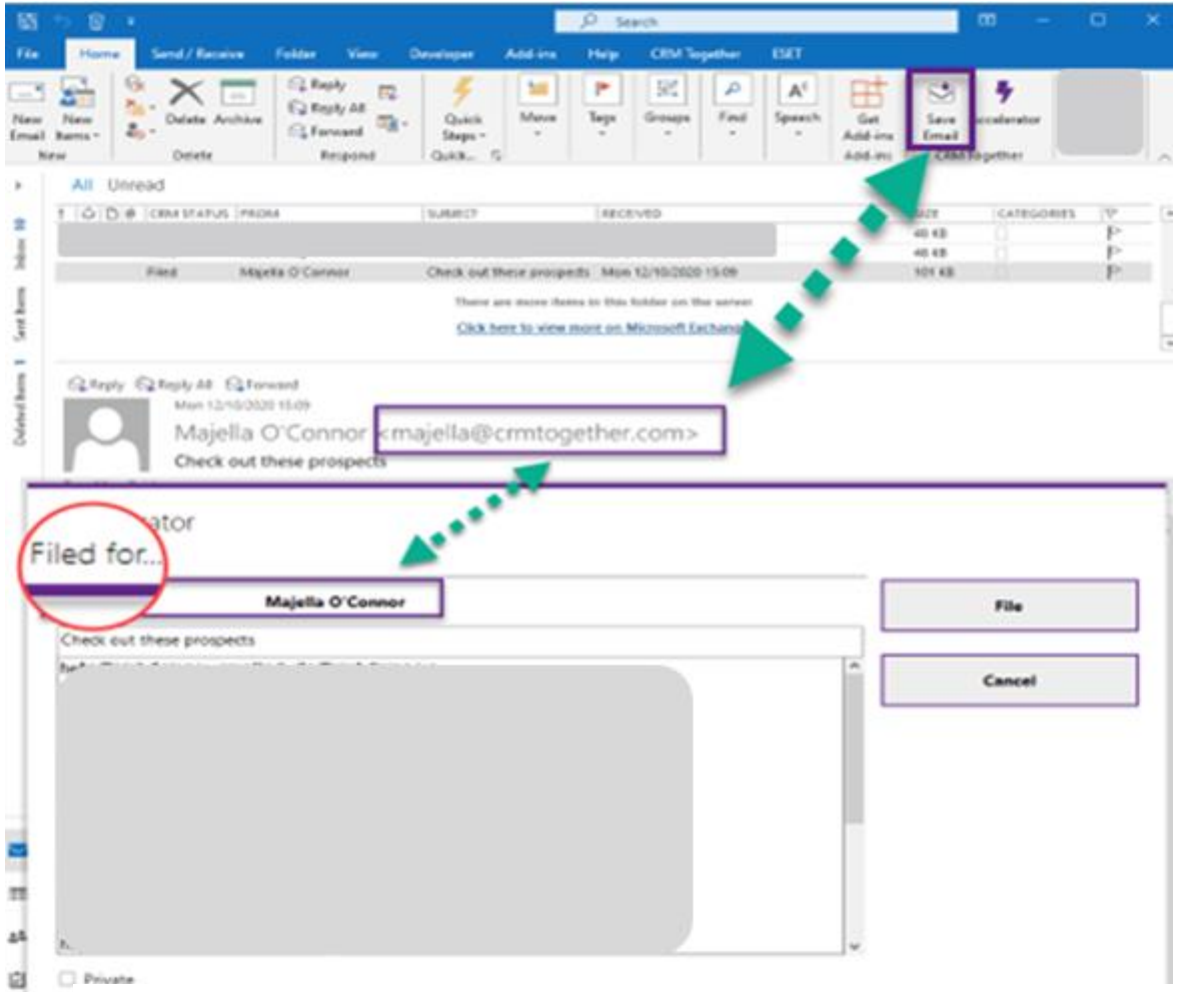


Figure 16 - Accelerator Ribbon - Save Email

OPTION 2 – TASK PANE 'SAVE EMAIL'

Using the 'Save Email' Button within the task pane will save an email to **whatever entity is being viewed within the task pane** at that moment

In this scenario, the task pane is showing the Company 'CRM Together' and so the email will be saved in the context of CRM Together rather than the person majella@crmtogether.com

In settings, the 'email save prompt' is turned on by default, this will confirm where the email will be filed as per the image on the right.

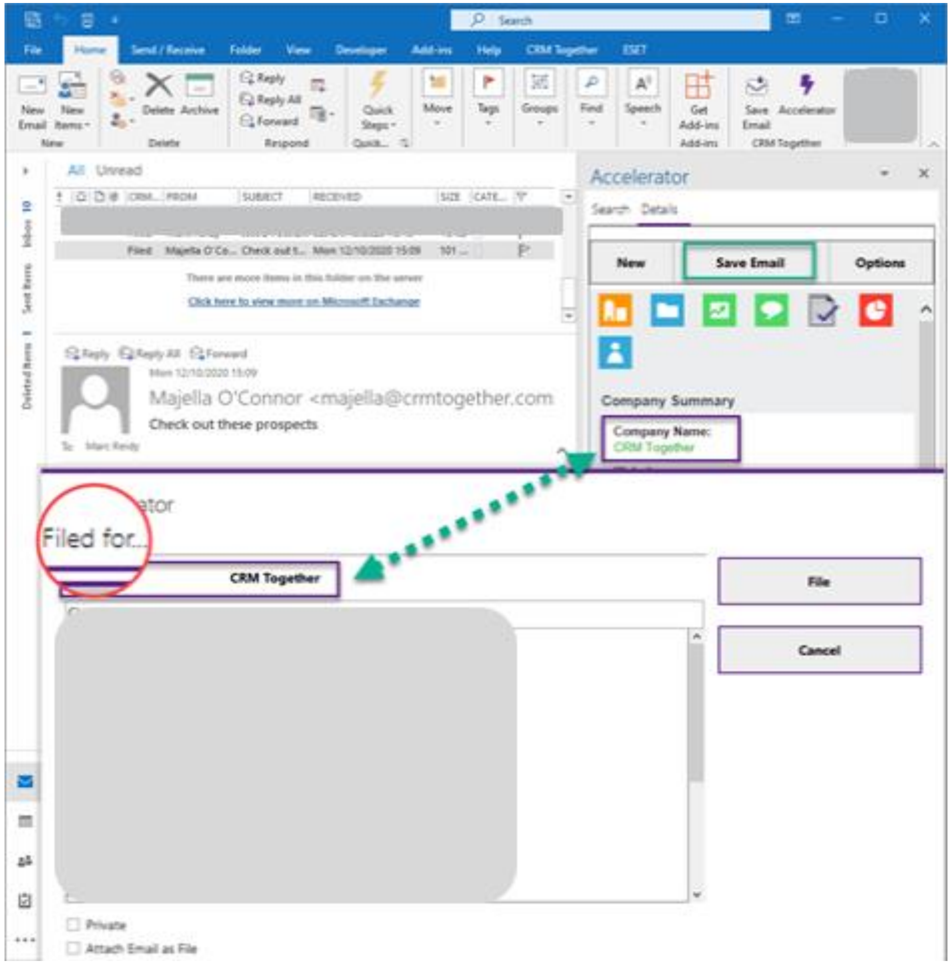


Figure 17- Accelerator Task Pane - Save Email

SAVE EMAIL OPTIONS

In the **Settings**, default parameters are set for options

- **Private** – Sets the record to be private in CRM
- **Attach Email as File** – Saves the entire email as a .msg file in CRM
- **Insert Email Subject** – Email Subject is saved and displayed
- **Insert Email Body** – Full thread of communication is saved and displayed

Advanced Settings are dealt with in more detail later in this training document

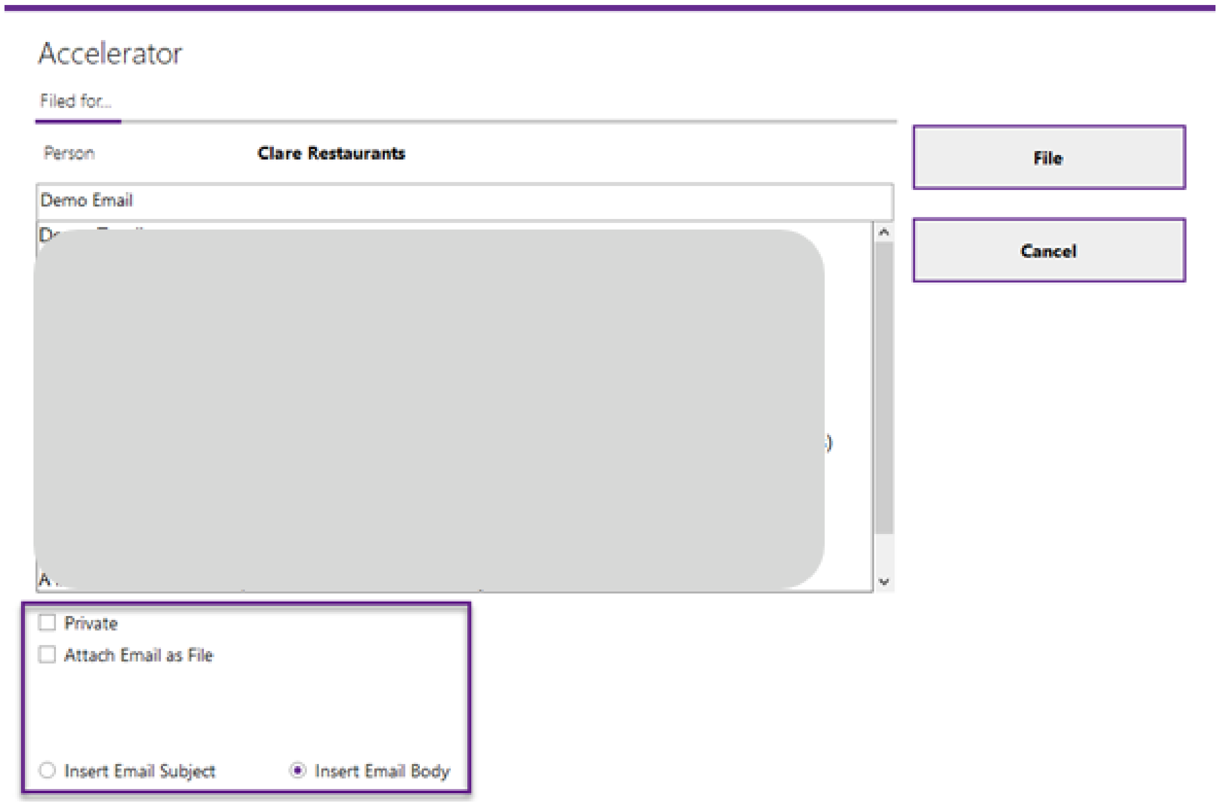


Figure 18 - Save Email Options

OPTIONS

The Options Menu will display as 'New', 'Save Email' & 'Options'

If the task pane is stretched, additional headings will appear e.g. 'Phone' with subheadings under options as demonstrated below

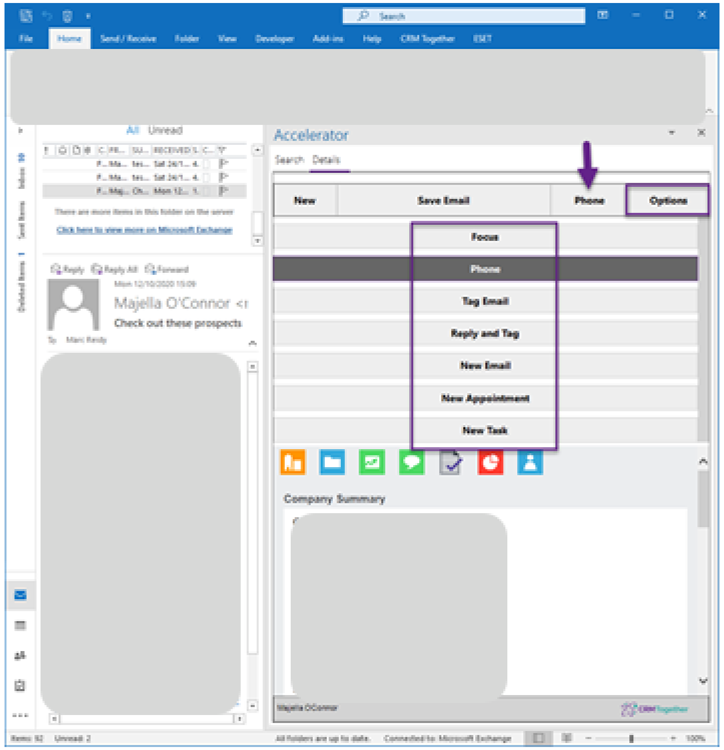


Figure 19 - Accelerator Task Pane Menu Options

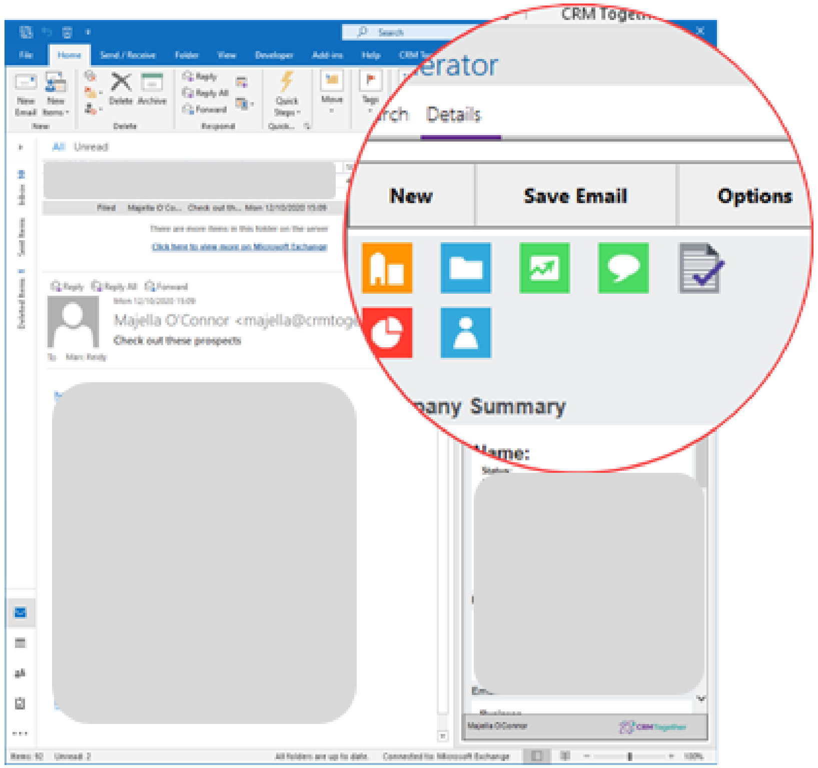


Figure 20 - Accelerator Task Pane Menu Options Extended

FOCUS

With this function, you can freeze the Accelerator task pane to display a fixed result.

This allows you to assign multiple email messages to this CRM context without the context screen changing during the automatic CRM search after each selected email.

Freezing is indicated by a blue frame around the context screen and must be manually released by re-selecting the function: 'Focus'

PHONE

Enter incoming and outgoing calls with the Accelerator Button - Options - Phone

With just a few clicks, you can add your conversation memo to the corresponding CRM reference highlighting the contact number used.

If the entity being viewed has more than one number, all will be displayed with the choice to indicate if it was a phone call made or received

Upon saving, the corresponding communication entry: including task, incoming/outgoing call with subject and time-stamped comments, is automatically created in Sage CRM.

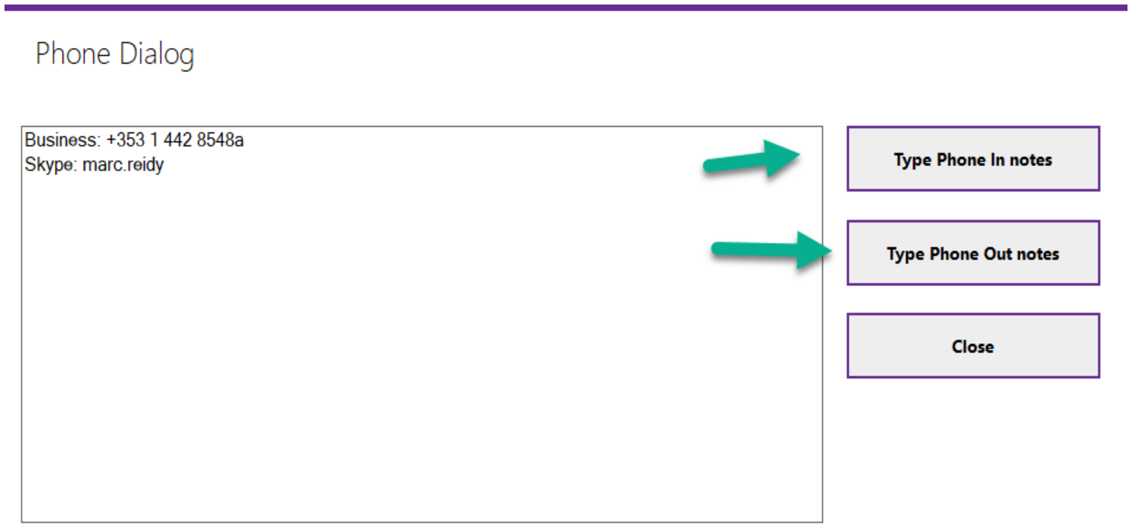


Figure 21 - Logging a Phone Call

TAGGING

This feature allows you to give context to an email thread

Tagging imposes a reference on the thread that means the context will show the case in this example relevant to the tag rather than reading the email address if you click off the email and back again.

- Select an email message
- Activate the Accelerator task pane
- Navigate to the entity you want e.g, Case/Opportunity
- Using the Options Menu, select the button Tag Email/Reply & Tag (*Reply all and Tag only appears where there are mulitple recipients*)
- Tagging imposes a reference on the thread that means the context will show the case in this example relevant to the tag rather than reading the email address if you click off the email and back again.
- This also means in Sage CRM, the email will be filed specifically against the case or opportunity rather than having to search through all company communications.
- Remove Tag will appear as a menu choice if a tag is in play, this means, if a commuication thread changes, it can be retagged against a new case/opportunity
- In settings there is an option to tag in the email body or the email subject line
- In the image an email is already tagged and associated with a case

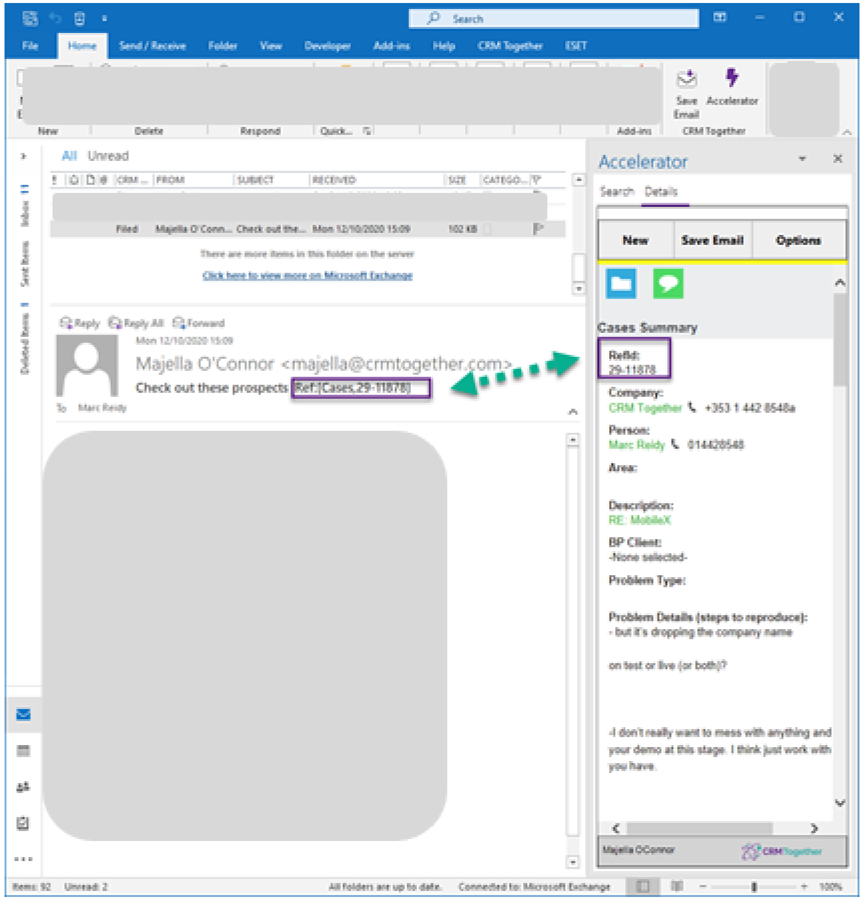
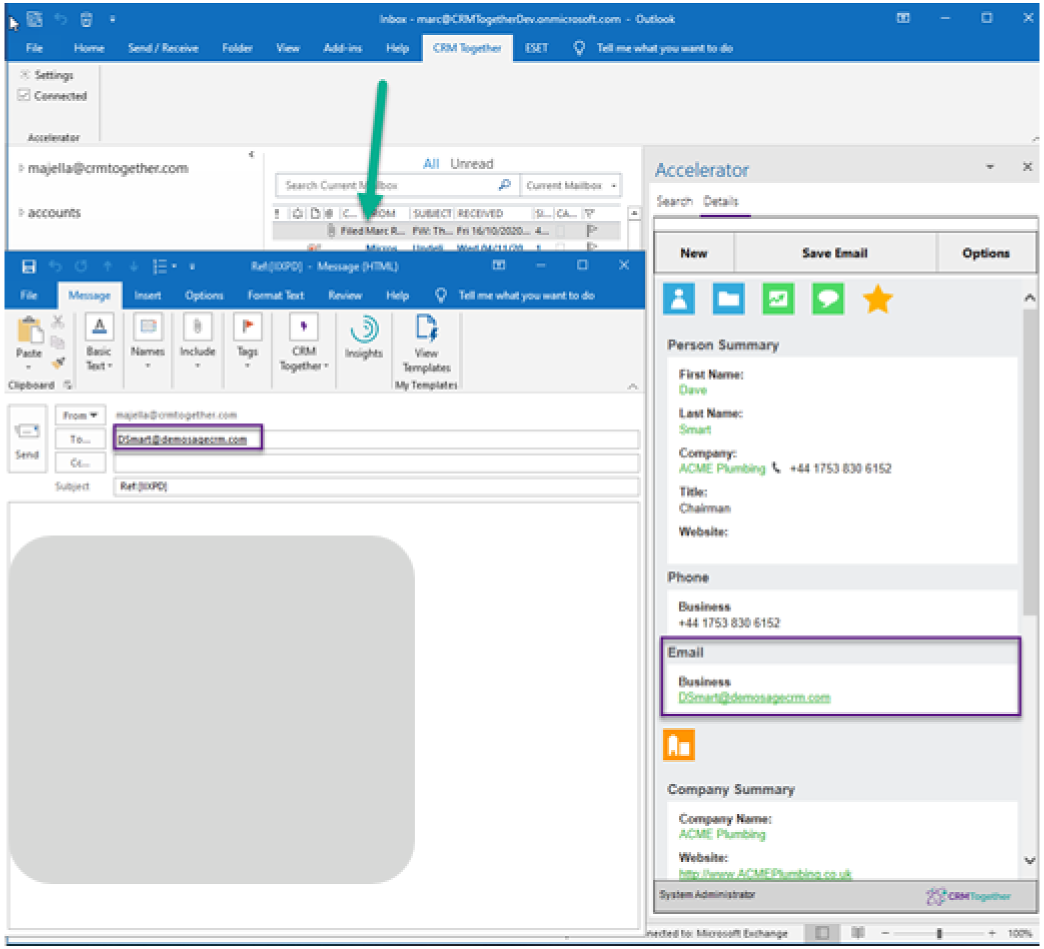


Figure 22 - Tagging Emails



REPLY & TAG

Reply & Tag will be used if it only the sent email you want tagged to the case

(*Reply all and Tag only appears where there are mulitple recipients*)

REMOVE TAG

If an email thread is associated with a case but the email exchange moves on to a new subject. It is possible to remove the tag so that the email thread is then saved against the person or tagged against a new case for example

NEW EMAIL

If the Accelerator Task Pane is used to navigate to a person or Company other than the email highlighted, the Options – New Email will take that context and populate the 'to' field in Outlook

Figure 23 - New Email Context from the Accelerator Task Pane

NEW APPOINTMENT

- The Outlook entry screen is extended with Sage CRM fields.
- **Important:** This function must be previously set up and activated for Accelerator on the Sage CRM server as well as in the user settings. The parameters for appointment/task synchronization must be set correctly in the Sage CRM server settings!

NEW TASK

- The Outlook entry screen is extended with Sage CRM fields.

This format follows that of a Figure 17 allowing a task to be created against the entity being view at the time in the task pane.

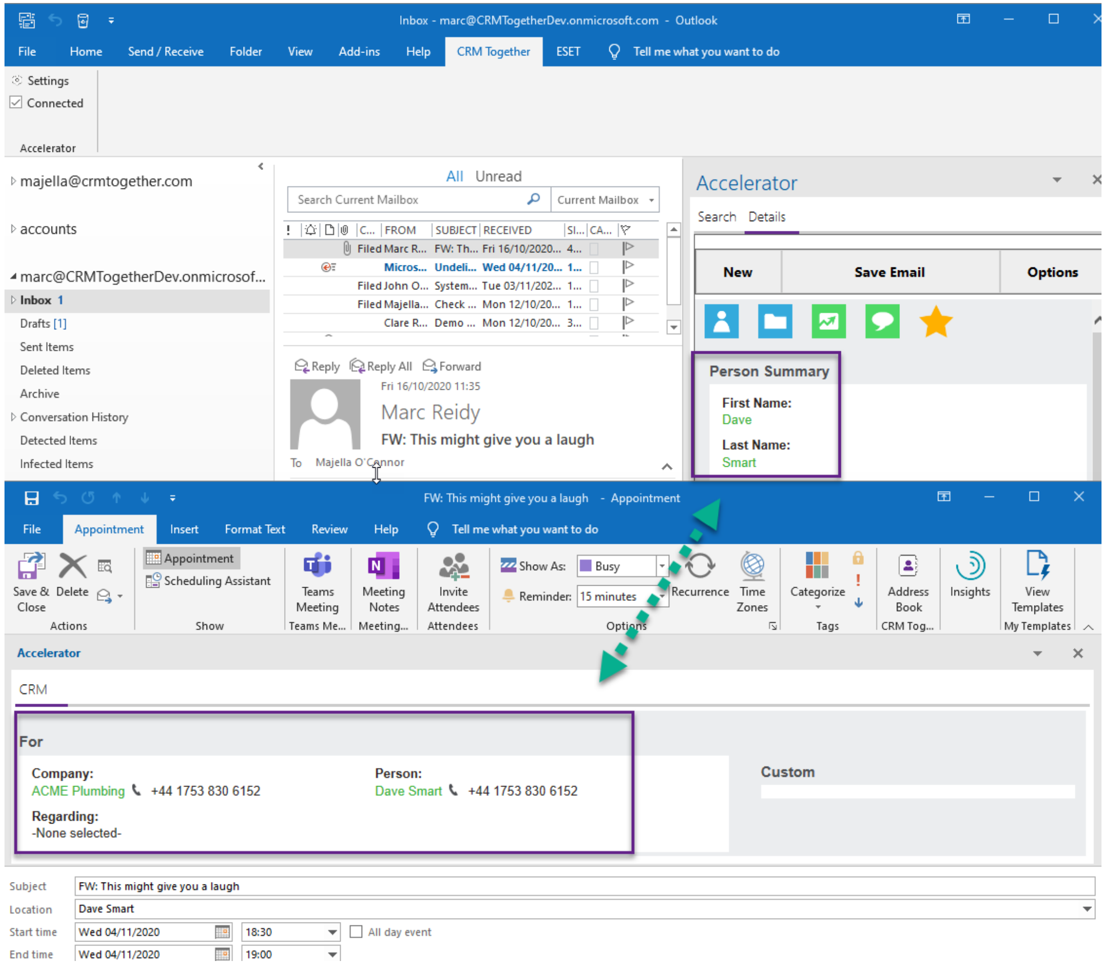


Figure 24 - Options - New Appointment

SAVE ATTACHMENTS

If an email is highlighted with an attachment, the Options Menu will expose a 'Save Attachments' button in the Options Menu

This can be used to save the attachment to the documents folder associated with the entity rather than the full email as a communication

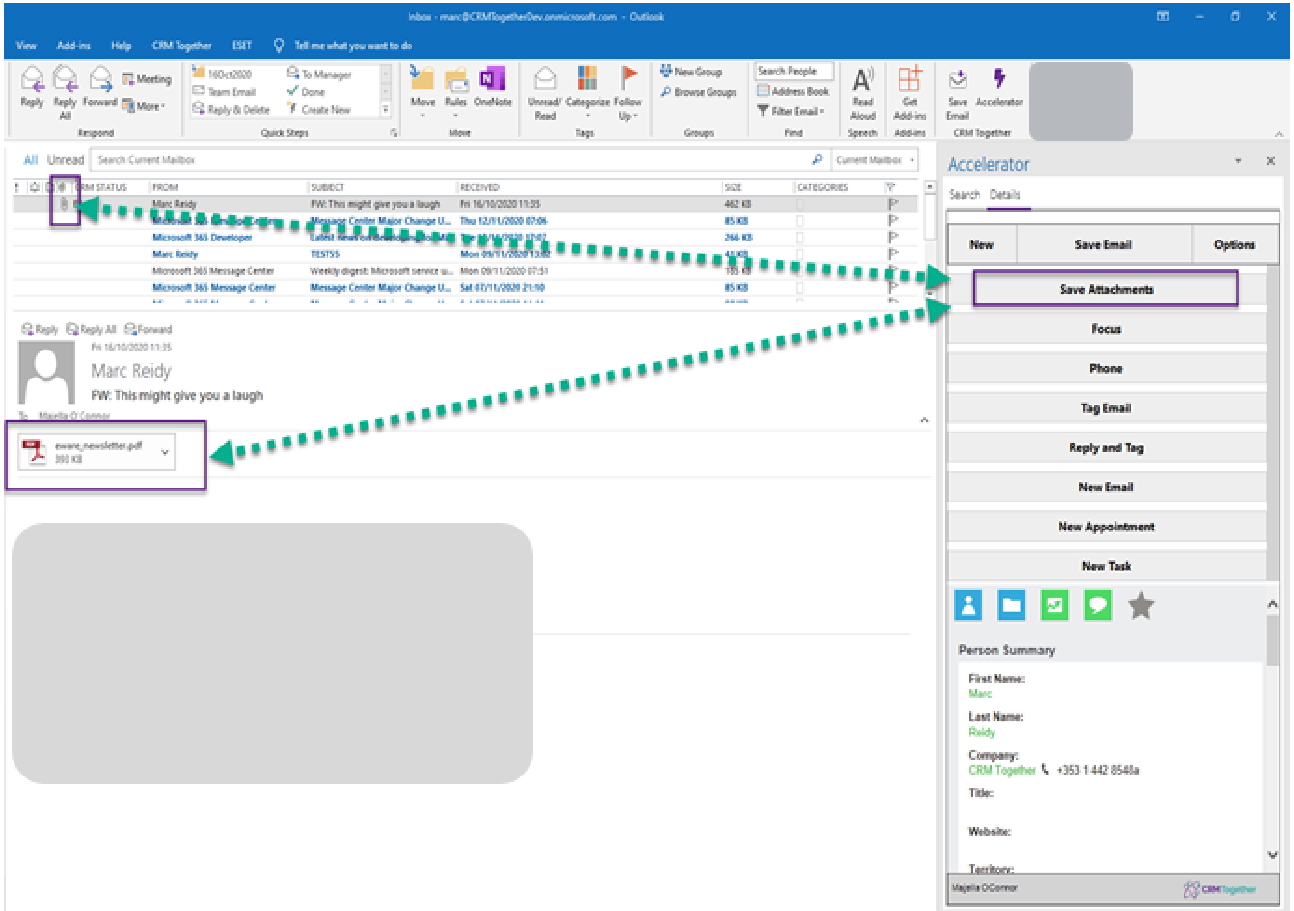


Figure 25 - Save Attachments

CHOOSE ATTACHMENTS TO SAVE

Where an email contains attachments you can choose what to file to CRM

Add Attachments

A list of all attachments is displayed, you can check those documents you want stored in CRM from here

Confirm saving / storing by clicking **FILE**

Within [Settings]() the default is set to nothing less than 25kb to eliminate items such as signture images. This is why in this case the notes attachment is not checked, simply ticking it will override the system and the notes will be saved as as document against the record.

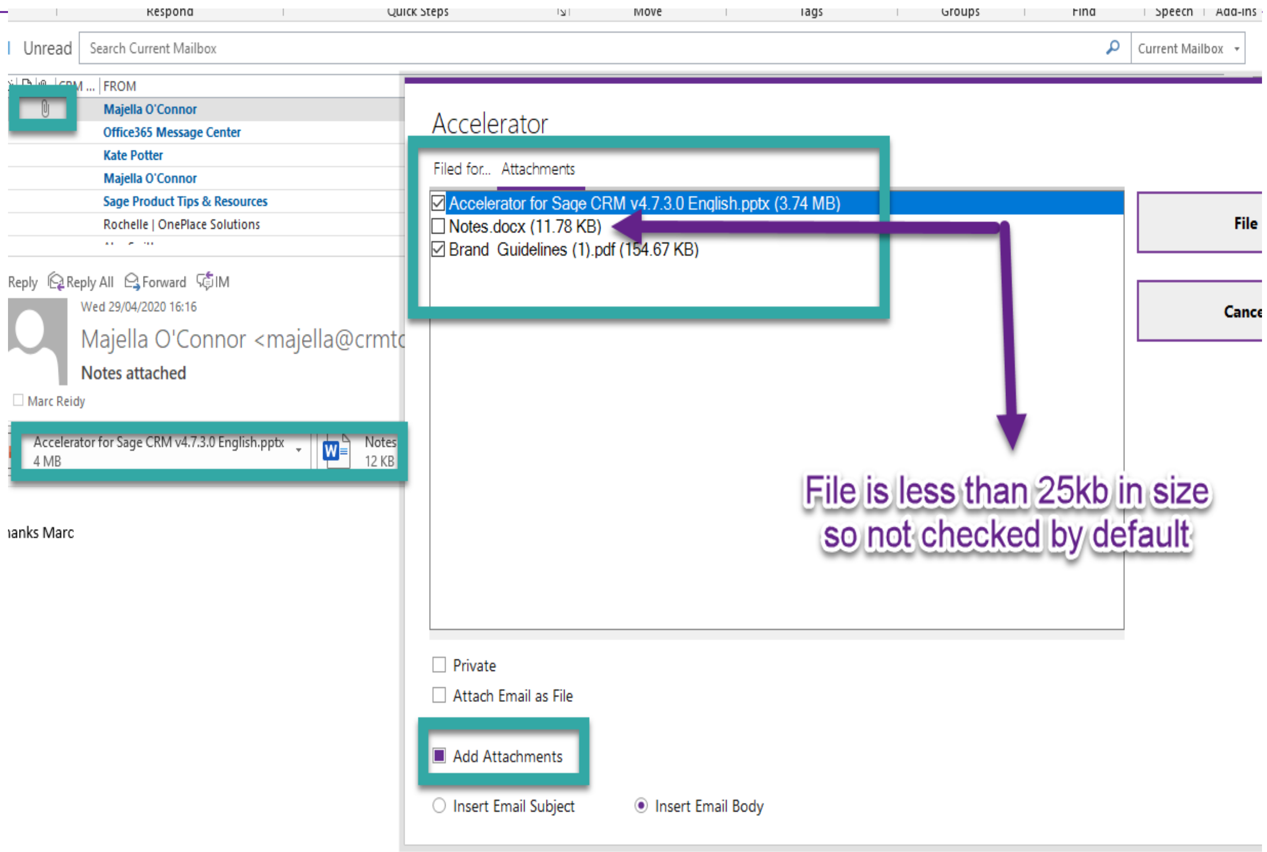


Figure 26 - Choosing Attachments to Save

DATA SEARCH OPTIONS

Accelerator can be used to search Sage CRM data from withing outlook. This means the user doesn't have to navigate to their browser to access data for use in outlook.

The 'Search' tab is located to the left of the 'Details' tab as highlighted in green

BY ENTITY

It is necessary to specify the entity type to search on, then enter the characters in the search box.

As highlighted in purple the search is for the Company Acme, results will be delivered when the button 'Go' is clicked on.

Entering additional characters will streamline the search results.

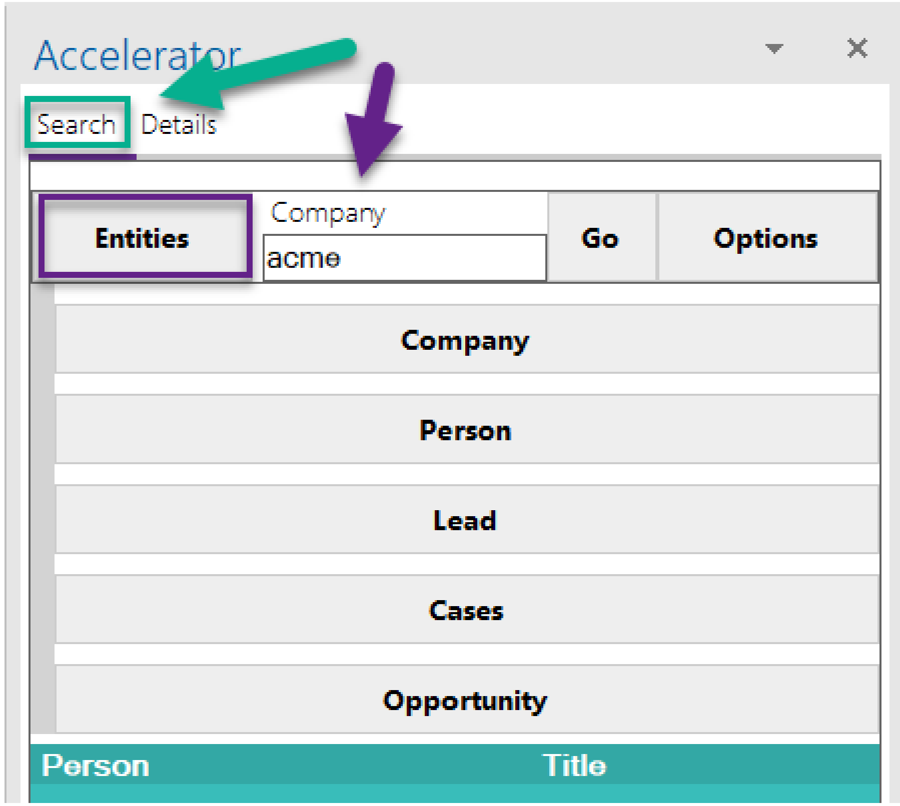


Figure 27 - Search Functions

OPTIONS

A menu is available from within the search tab allowing you to access data through a number of means

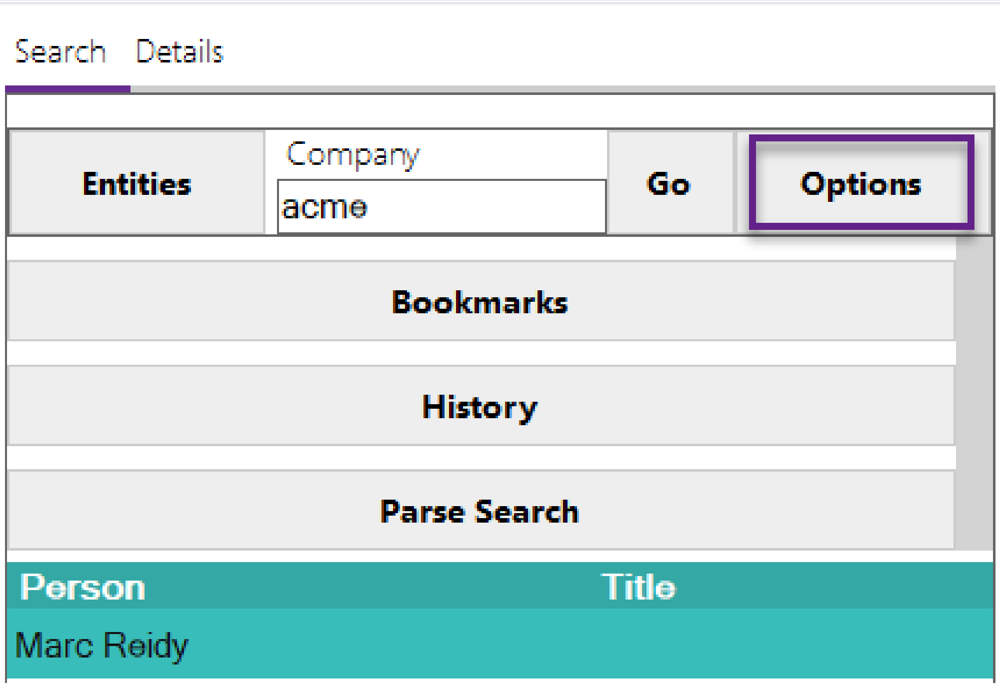


Figure 28 - Search Options

* BOOKMARKS

These are items you have assigned a bookmark to so that you can easily access them. It works similarly to favourites in your browser

(not enabled by default)

Must be requested at setup stage.

HISTORY

A calendar-based record of your journey through CRM using Accelerator

This can be filtered by entity type for easy navigation

PARSE SEARCH

This feature as seen in Figure 22 allows you to sweep an email exchange and extract any email addresses within the text.

You might use this function if a customer was mentioned in an email exchange and you wanted to check if they are already entered into CRM.

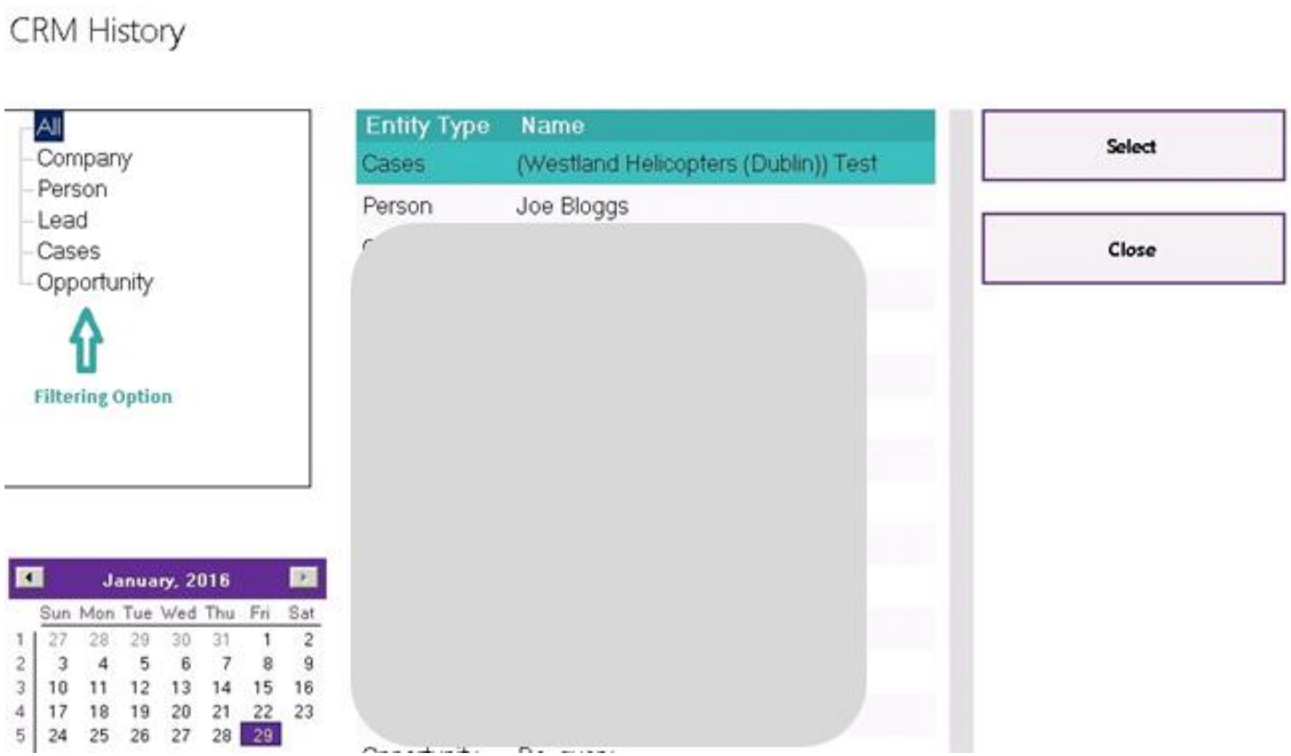


Figure 29 - Accelerator Navigation History

NEW EMAIL – ACCELERATOR RIBBON

When in a new email, a ribbon presents allowing you to access your Sage CRM data as needed.

The standard Outlook send button works as normal, but if you wish to save to CRM you use the buttons featured on the Accelerator Ribbon

It is possible to link the Outlook Send button to Accelerator if you wish every email sent to be filed to CRM.

This is covered in Settings later in this document

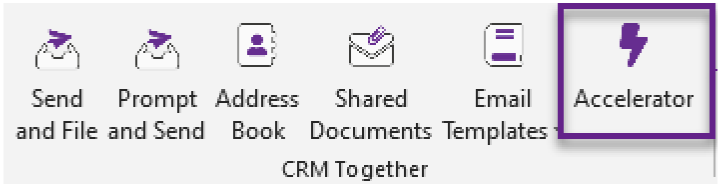


Figure 30 - New Email Ribbon

ACCELERATOR TASK PANE

Clicking on the Accelerator Lightening button will switch on the task pane to view your Sage CRM Data

SEND AND FILE

If you are sending an email and wish to save it to CRM you use the Send and File Button which will automatically file the email against the sender in CRM.

If the sender is not in CRM, the email will be saved against the logged in user

PROMPT AND SEND

If you are sending an email and wish to save it to CRM, but want the system to prompt you on the proposed location to save to, you use the Prompt and Send button from the ribbon which will prompt first and if you accept the proposed location, then save the email in CRM.

If you are unhappy with the context, you choose the option to **send email only** or click cancel, then open the Accelerator Task Pane, navigate to the location you want and save the email there

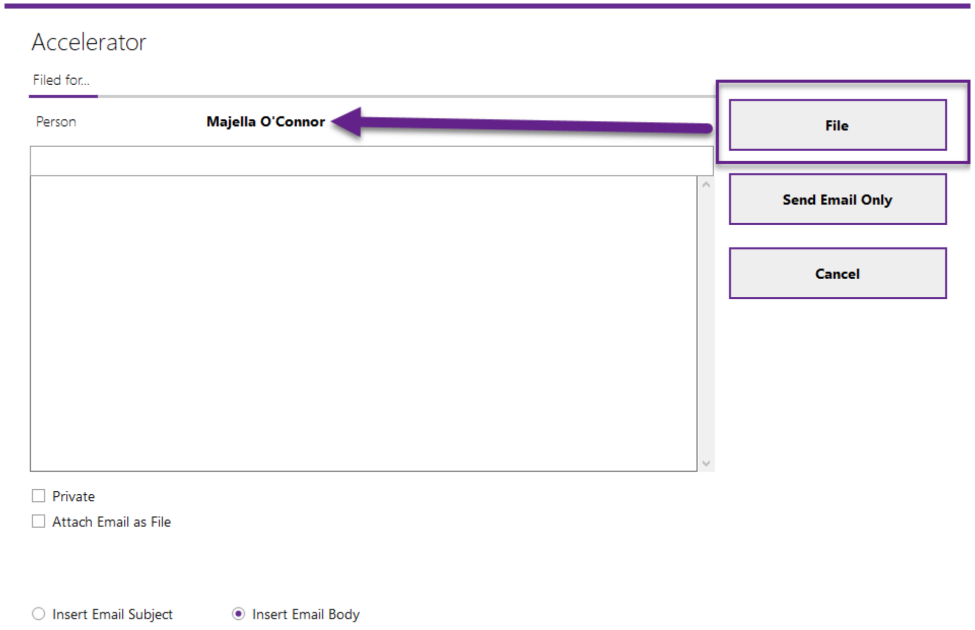


Figure 31 - Prompt and File

CRM ADDRESS BOOK

When drafting a new email, you can use Sage CRM as an address book, easily navigating to a person's details and choosing to populate the to: CC: or BCC fields

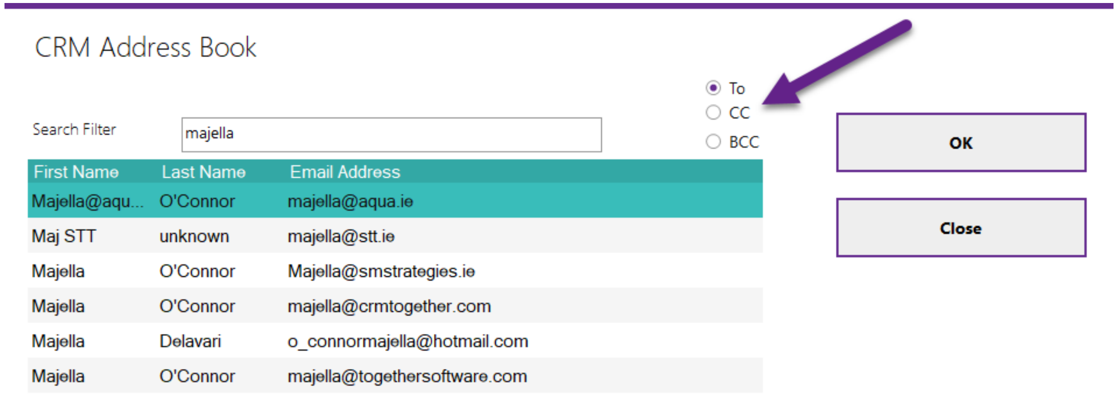


Figure 32 - CRM Address Book

SHARED DOCUMENTS

When drafting a new email, it is possible to access the shared global documents stored within Sage CRM and attach them to an email from within outlook using the Accelerator ribbon available in a new email window

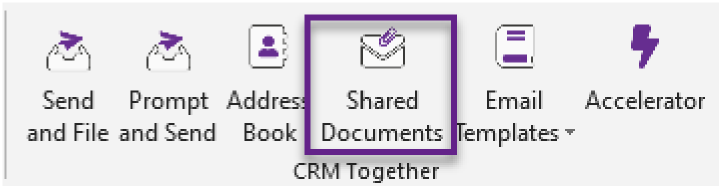


Figure 34 - Accessing Shared Documents

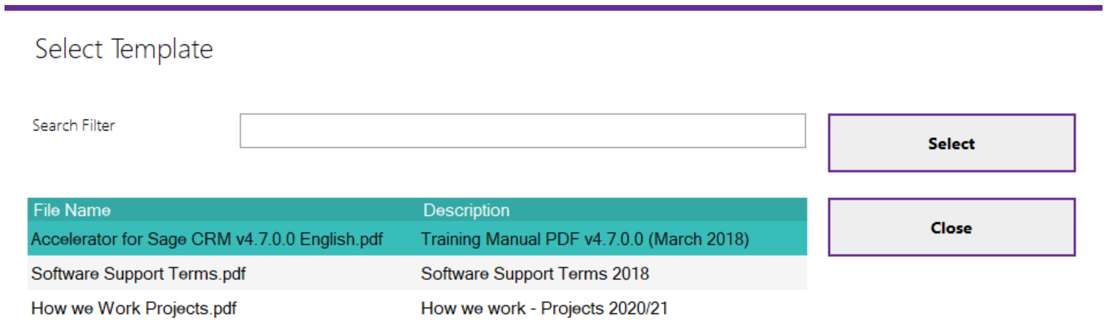


Figure 33 - Choosing a shared Document from the CRM Library

EMAIL TEMPLATES

It is possible to create templates in Sage CRM to use within email

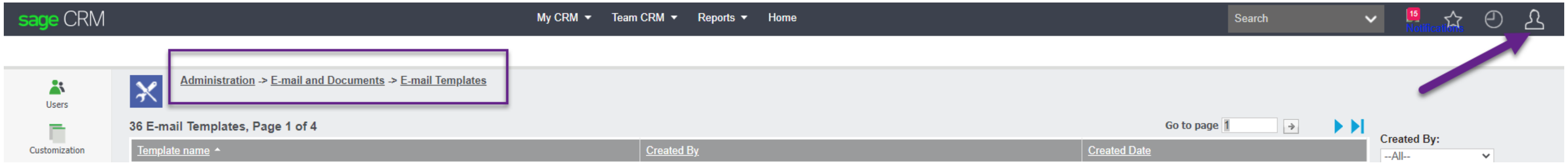


Figure 35 - Sage CRM Template Setup

GET TEMPLATE

Access the template you need to and open it in CRM for editing.

GET TEMPLATE & MERGE

Open the Accelerator Task Pane and search the entity you wish to merge data with, then choose your template from CRM to complete a merge in context

In the example the merged email is for Majella O'Connor as dictated by the Accelerator Task Pane.

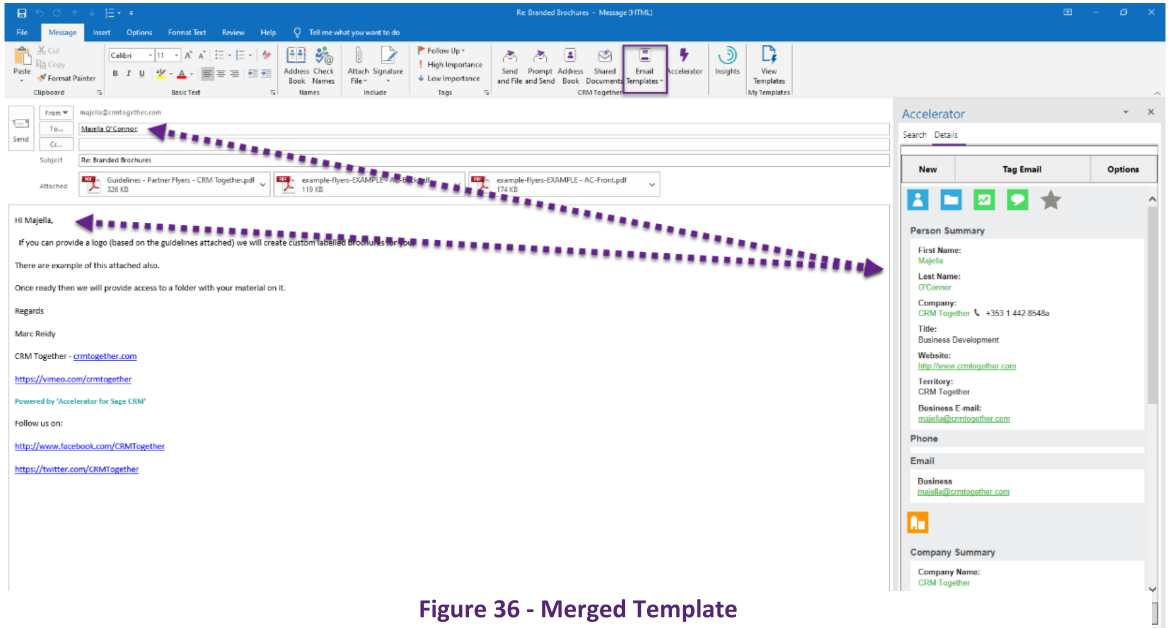


Figure 36 - Merged Template

OPTIONAL ADD ON'S AVAILABLE

Accelerator can be customised, to find out more, talk to your Sage Business Partner

* MAIL MERGE

The mail merge application is available for download from the Accelerator page on My CRM.

This application only runs on windows and requires Microsoft word to be installed on the client.

Default state = Not installed

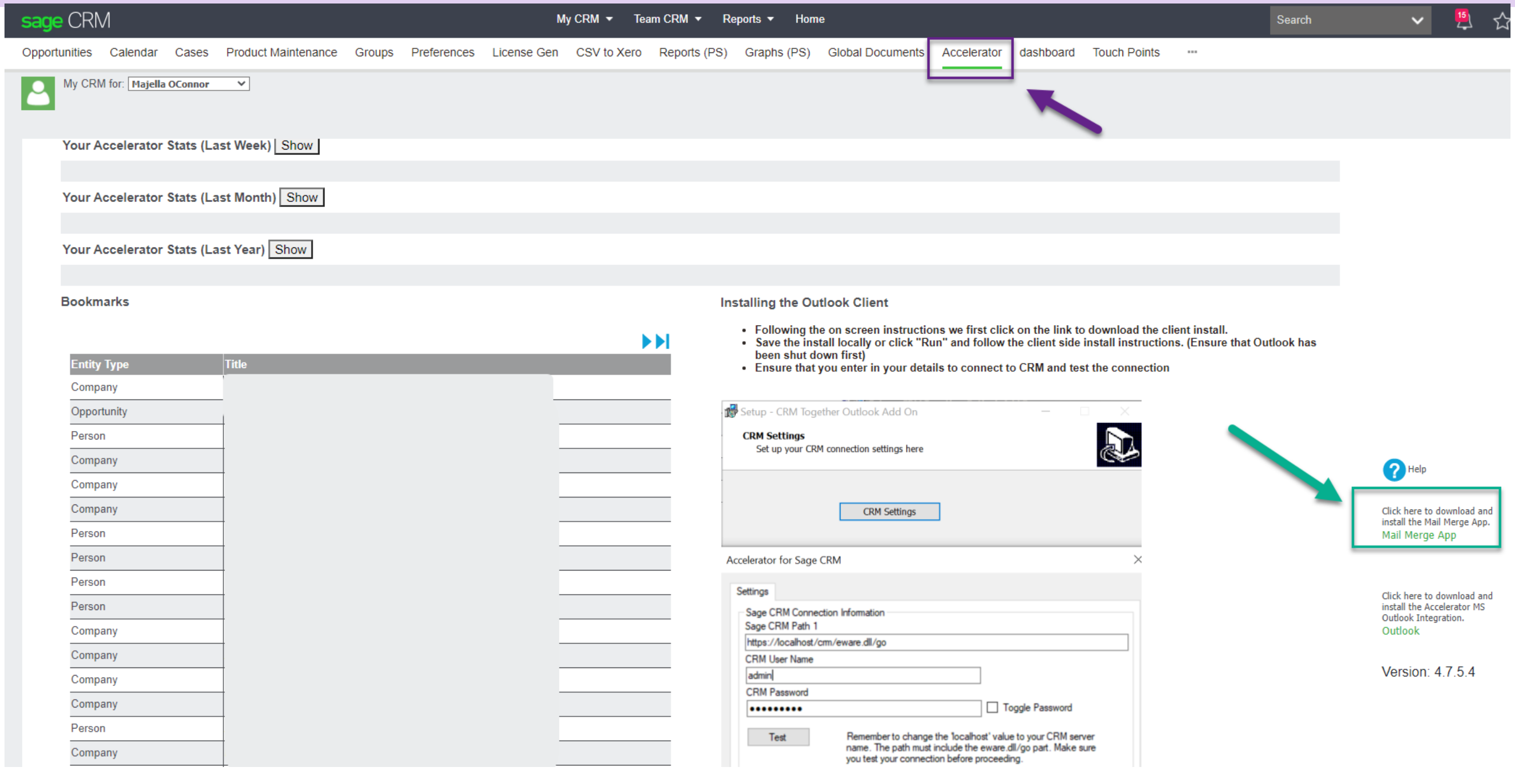


Figure 37 - Mail Merge App

Word & Excel

The Mail Merge Application incorporates features such as:

- Edit/merge an existing document in Excel or Word and re-upload this (as a new record) into CRM
- "Email Document" - Immediately process without the option to edit opening an email and embedding the document
- "Email Mail Merge Attachment" - Completes the mail merge and opens an email attaching a PDF of the merged document
- "Print Document" - Immediately print without the option to edit.
- "Download Merge Data" - Allows you to save the data from a view to use when building a new Mail Merge document

Demo Video available at https://vimeo.com/201688906

For setup, please talk to your Sage Business Partner

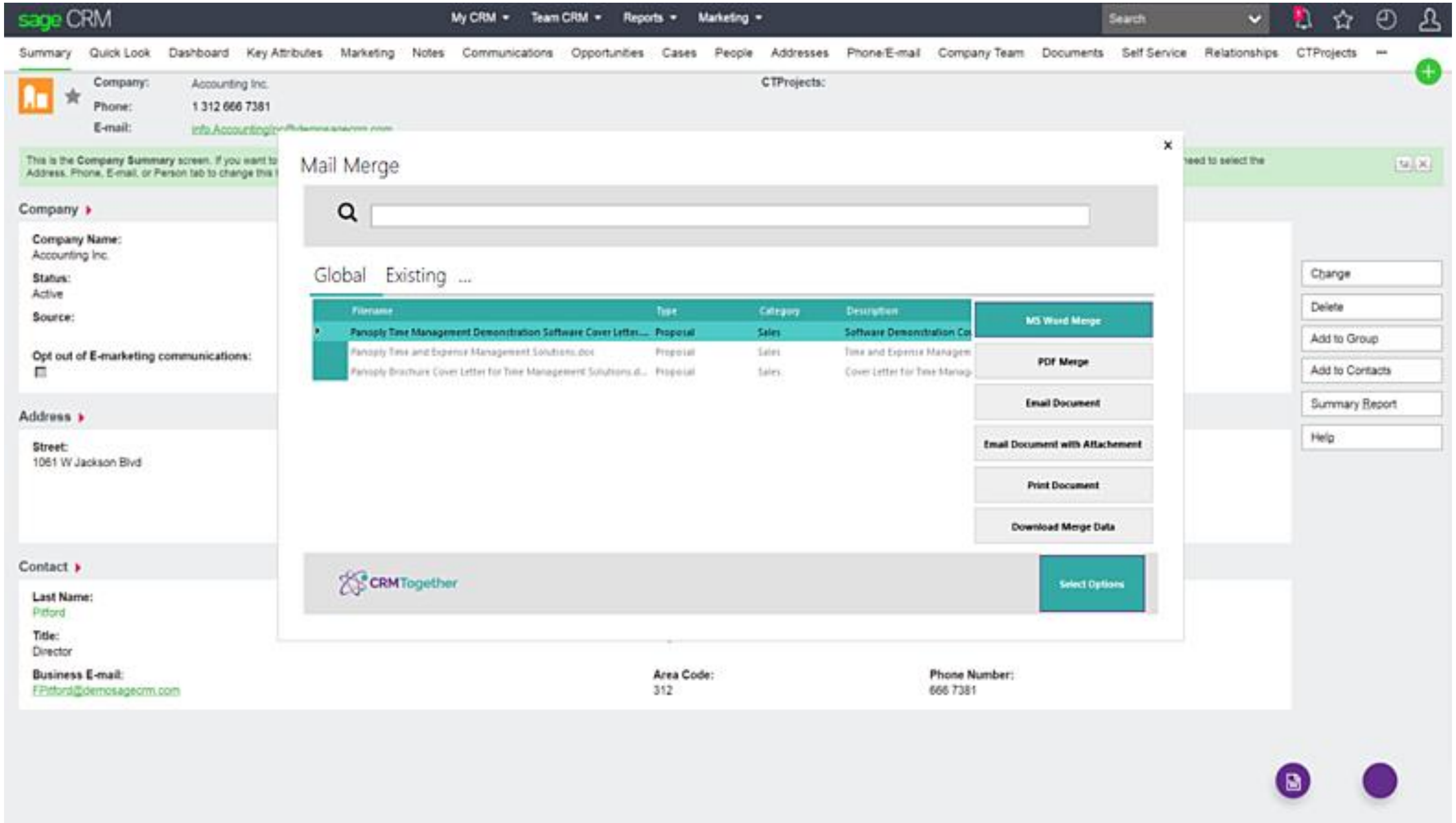


Figure 38 - Mail Merge App

ACCELERATOR SETTINGS

Any features of Accelerator that must be switched on at server level is indicated with an Asterix.

Otherwise there are a number of settings that can be changed at user level as detailed below

Settings are accessed via a CRM Together Tab in Outlook, whereas to switch on Accelerator, this is done via the Home Tab

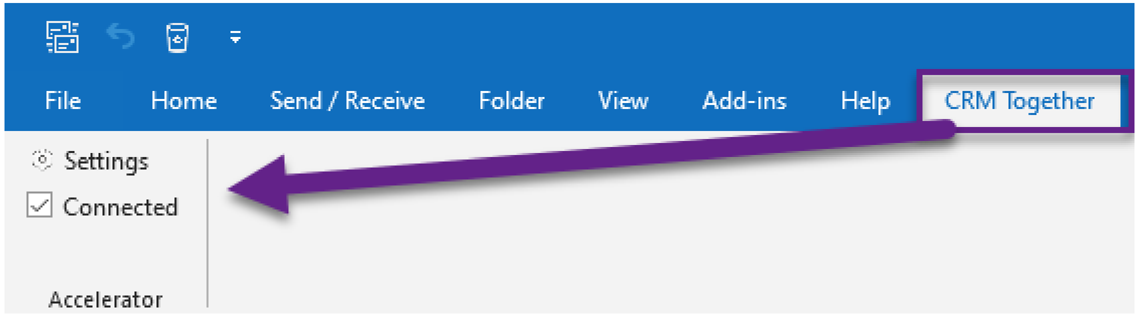


Figure 39 - Settings Location

CONNECTED CHECKBOX

If a user wishes to disconnect Accelerator temporarily this setting can be unchecked.

This might be used if broadband is not available or if CRM is not a priority at a given time.

SETTINGS

Most default settings work for users, but changes that can be made are detailed below

CONNECTION SETTINGS

This is where at setup the Sage CRM Path is set with the user's login details

The Sage CRM path must include the local host name followed by /CRM/eware.dll/go

ADVANCED SETTINGS

PLEASE NOTE:

After changing user settings, it is necessary to empty the data cache and restart Microsoft Outlook.

Changed user settings have a direct impact on functionality, handling procedures and performance.

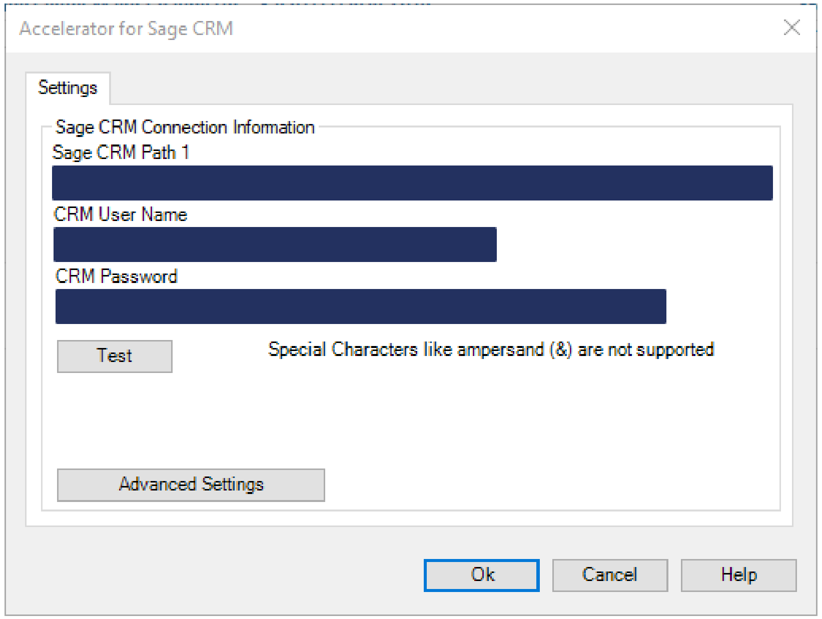


Figure 40 - Login Information

TAB 1: MORE THAN ONE CONNECTION OPTION

There might be occasion where more than one CRM server is accessed in a company.

Please note:

If your corporate policies allow the use of Microsoft Outlook via the Internet and your Sage CRM instance is publicly accessible. It is recommended to use the public launch path for your Sage CRM

INTERNAL: http://yourCRMServerName/crm/eware.dll/go

EXTERNAL: http://crm.yourdomain.com/crm/eware.dll/go

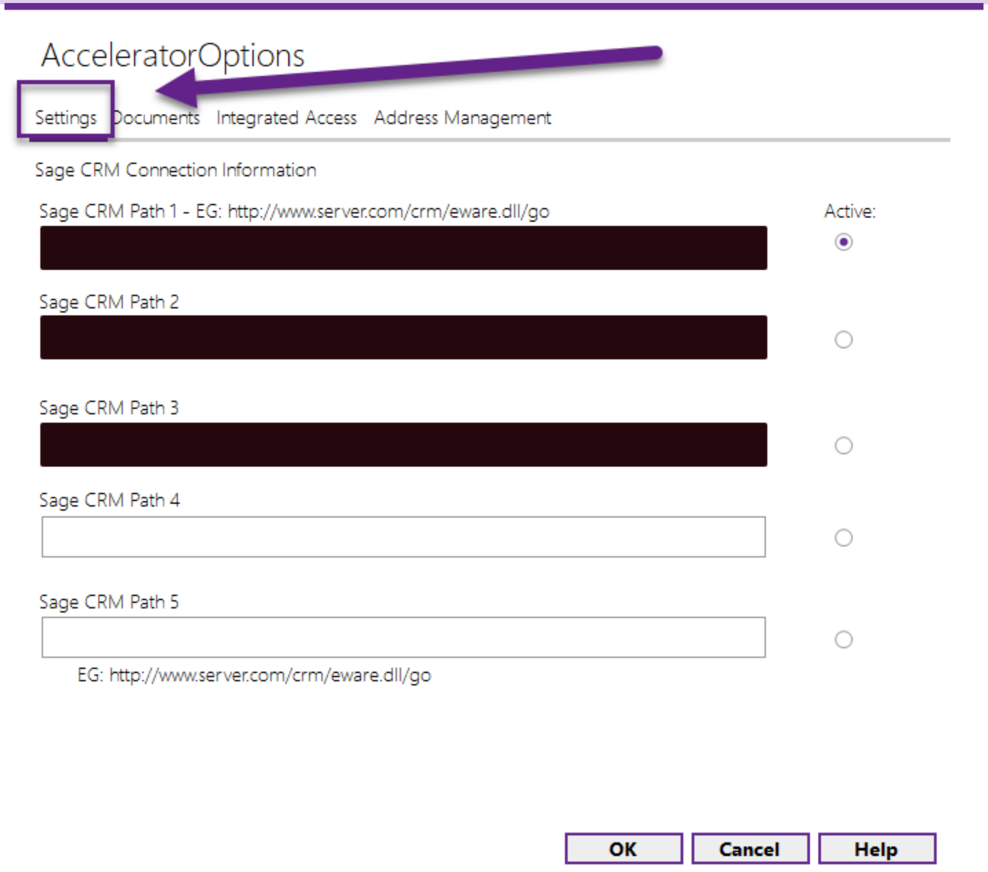


Figure 41 - Settings Tab 1

TAB 2: DOCUMENTS

This tab holds version information, settings related to tagging, and document information

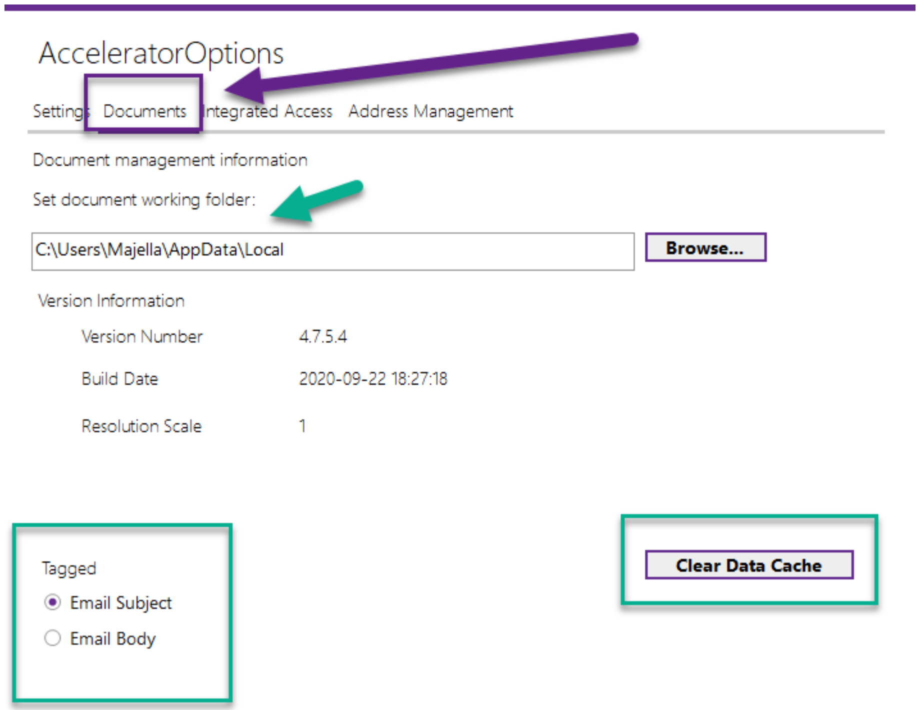


Figure 42 – Settings Tab 2

TAG LOCATION EMAIL SUBJECT/BODY

The default setting is for tags is to be inserted into the email subject.

You can change this to be the body of the email by setting this option

DOCUMENT WORKING FOLDER

Working folders for document filing, mail merging and caching.

Create or select a user-specific working folder in your file system.

Please note: Select a folder for which you have sufficient access rights to create, modify and delete files.

This folder must be available on mobile devices even with a decoupled network.

With remote desktop servers, please ensure that you select a personalized individual user folder.

CLEAR DATA CACHE

After changing the user settings, it is necessary to empty the data cache and restart Microsoft Outlook

TAB 3: INTEGRATED ACCESS

This tab contains login information and would be used to troubleshoot login issues

User Name

Your Sage CRM login username

Password

Your Sage CRM user password

To select toggle will expose the password in use.

To click **'Test'** will test the connection with the login details shown.

IIS

IIS AutoLogon

Use IIS AutoLogon

IIS AutoLogon (Default Credentials)

Use IIS AutoLogon with Default Credentials

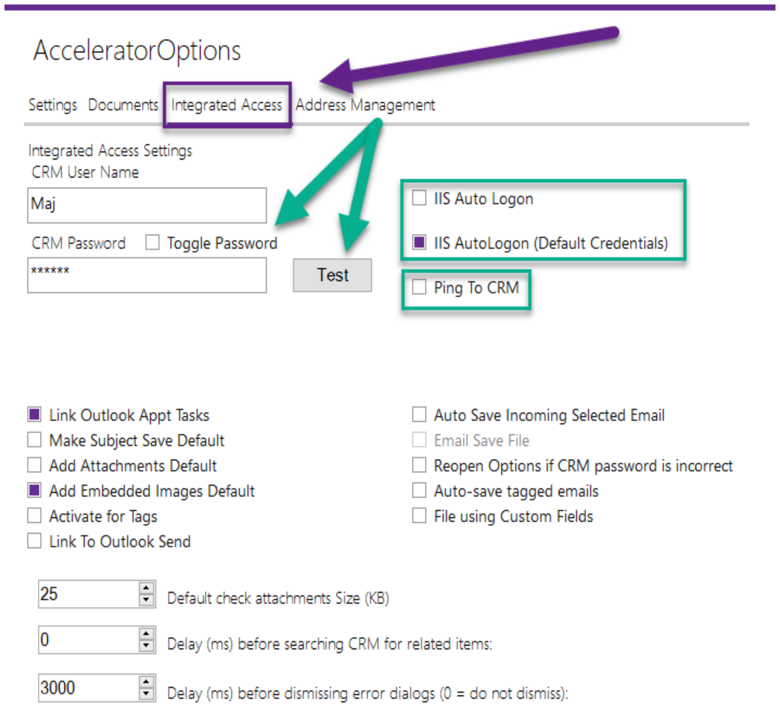


Figure 43 - Settings Tab 3

PING TO CRM

Determines whether a user is connected to the internet by pinging to the CRM server. If there is no response the system is offline.

Default value = disabled.

* LINK OUTLOOK APPT TASKS

Essentially extends the Microsoft Outlook appointment and task function by enabling the option to select, add and link CRM companies, persons and subjects to a process. (This function must be previously activated and set up on the server).

Default value = disabled

MAKE SUBJECT SAVE DEFAULT

Determines whether only the email message subject or the message subject and message content is saved as a suggestion in the dialog box.

Default value = enabled (message subject only)

ADD ATTACHMENTS DEFAULT

Allows the user to store email attachments in the CRM document library and sets the storage of attachments to “active” in the dialog box.

Default value = enabled

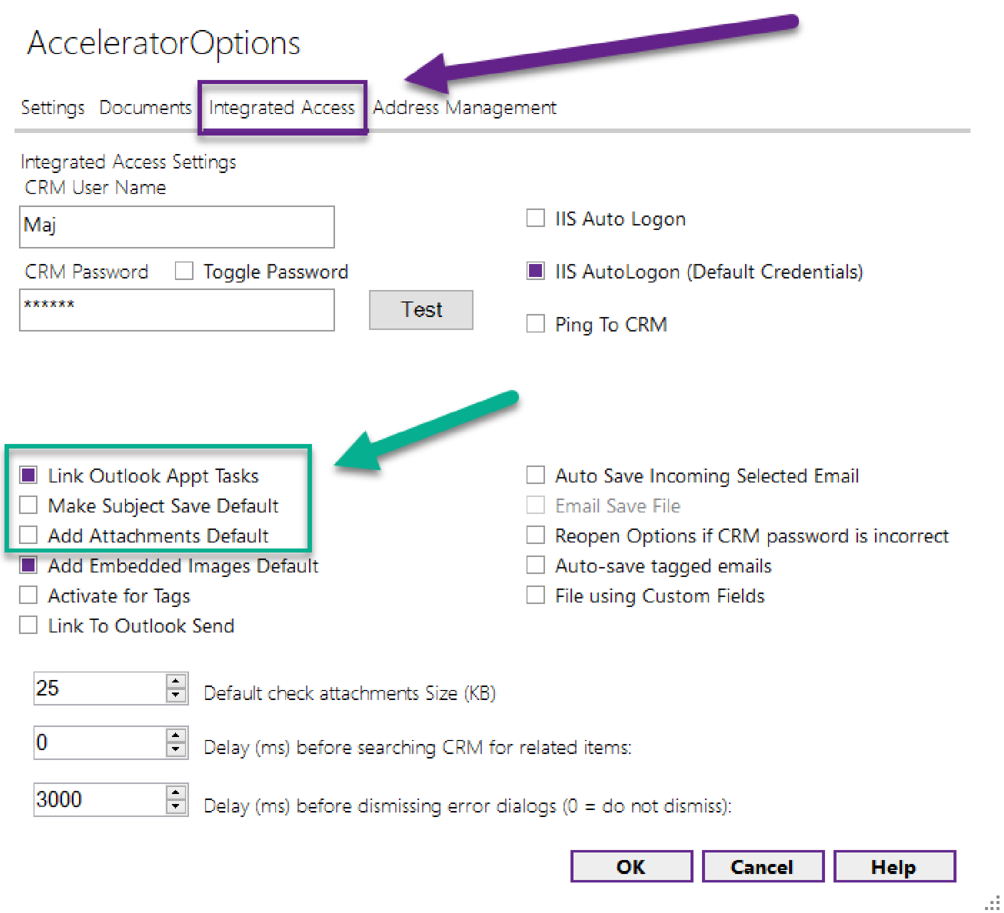


Figure 44 - Settings Tab 3

ADD EMBEDDED IMAGES DEFAULT

Allows the user to specify whether they save embedded images within the email

Default value = enabled

ACTIVATE FOR TAGS

Opens the Accelerator pane (if closed) when a tagged email is selected

Default value = disabled

LINK TO OUTLOOK SEND

Determines whether the standard Outlook send button is linked to save in CRM automatically or if the send options of the Accelerator Ribbon in a new email must be used

AUTO SAVE INCOMING SELECTED EMAILS

Automatically saves Emails in CRM upon first reading without use of the storage dialogue box.

Default value = disabled

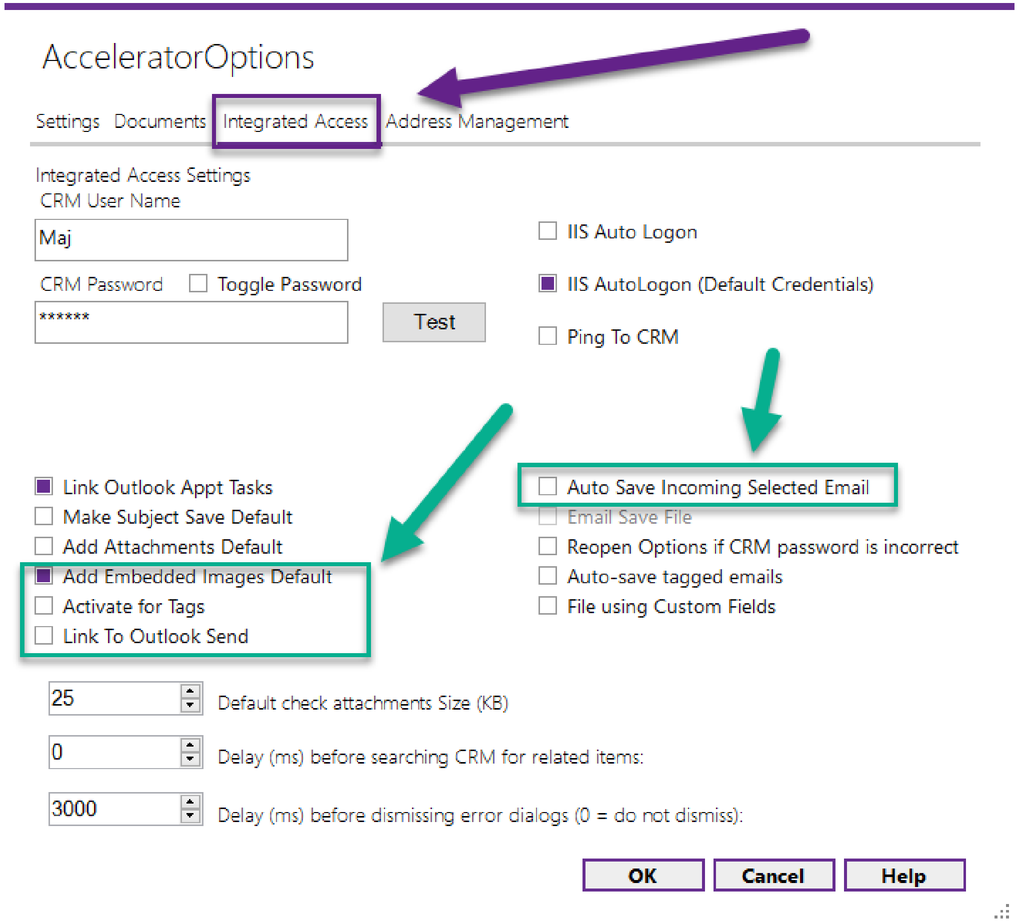


Figure 45 - Settings Tab 3

EMAIL SAVE FILE

Saves the email as a file (*.msg) in CRM. (This function is only available if "Email storage entry" has been previously disabled)

Default value = disabled

REOPEN OPTIONS IF CRM PASSWORD IS WRONG

Dialog box prompting the entry of login information in case of unsuccessful connection to the CRM system.

Default value = enabled

AUTO SAVE TAGGED EMAILS

Automatically saves a selected email if it is tagged

Default value = disabled

FILE USING CUSTOM FIELDS

Enables editing custom fields before filing mail to CRM, this might be used if storing documents needs specific fields associated.

Default value = disabled

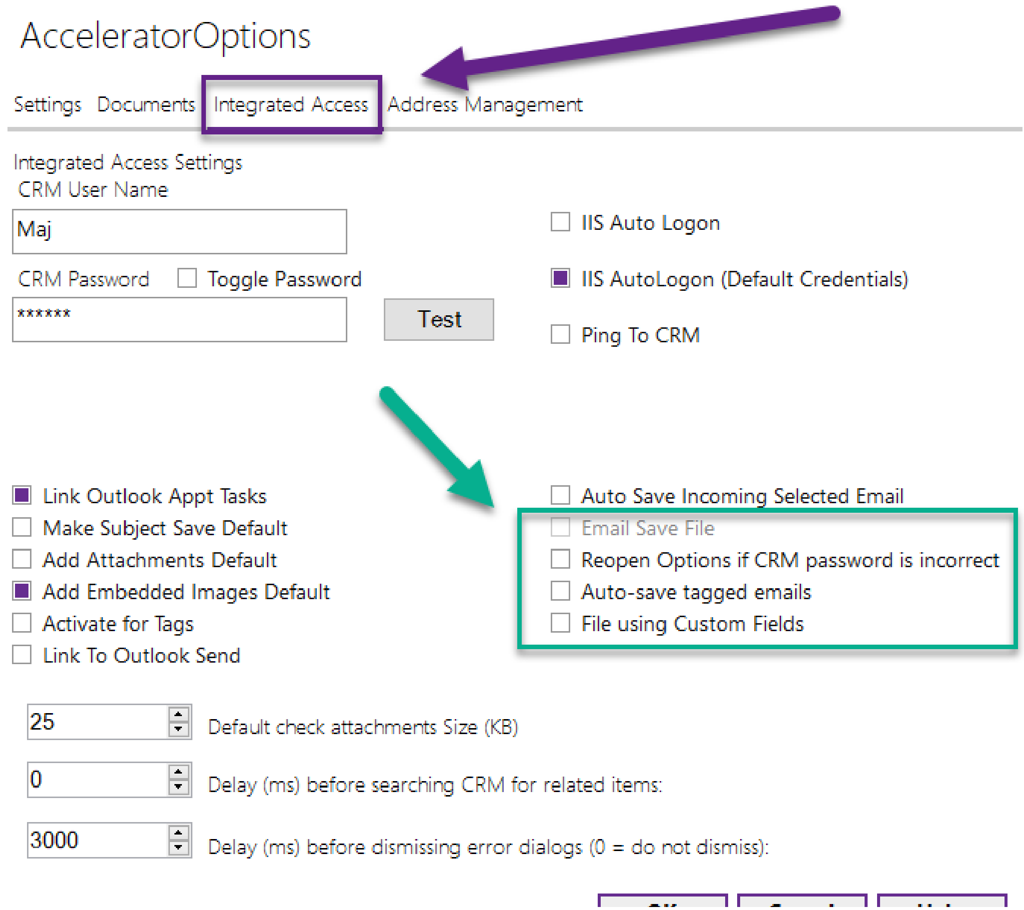


Figure 46 - Settings Tab 3

In the scenaro where **'File using Custom Fields'** is enabled an additional tab appears when saving an email with an attached as per Figure 48 below, this additional Doc Settings tab contains fields from CRM as per Figure 49

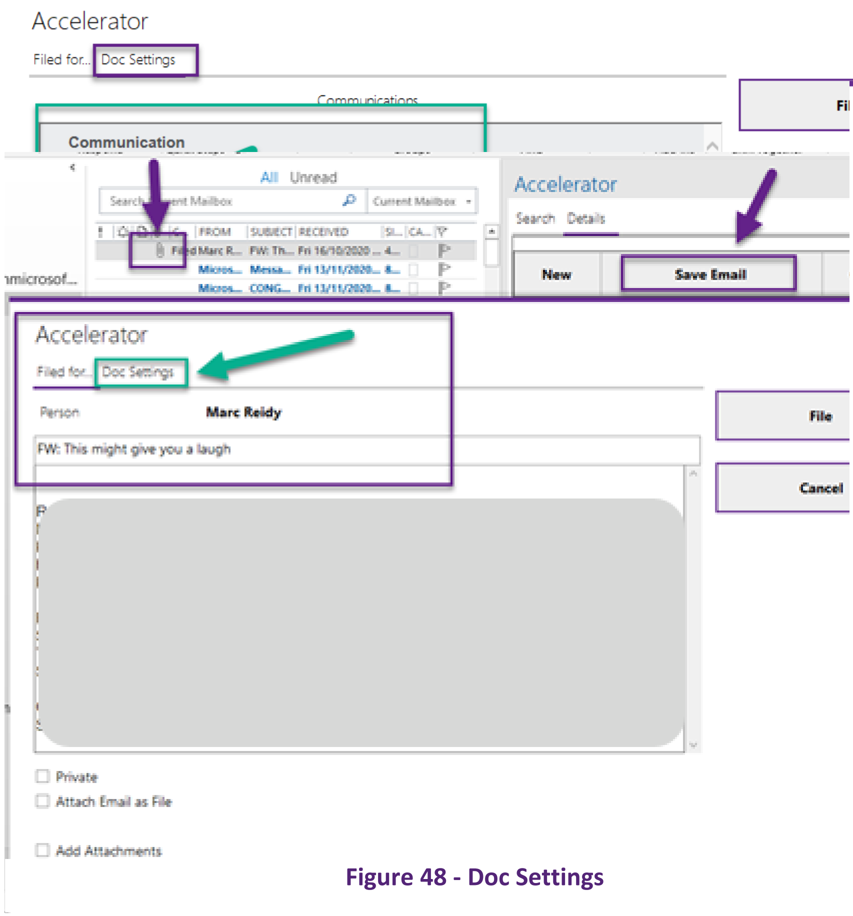


Figure 48 - Doc Settings

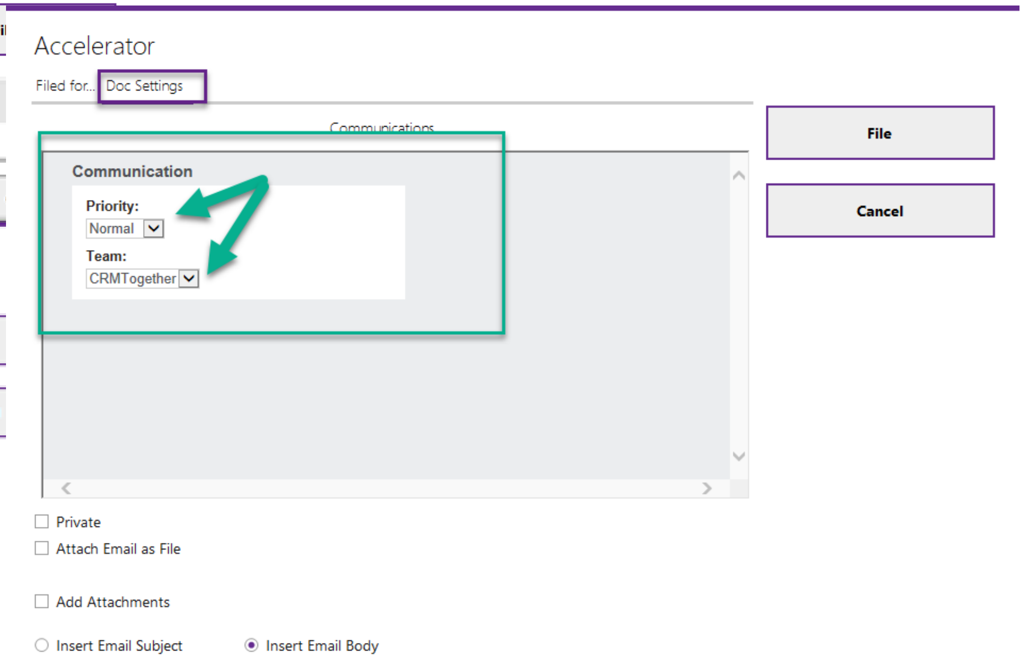


Figure 47 - CRM Fields set for Documents saved

DEFAULT CHECK ATTACHMENTS SIZE

This will indicate a minimum size of attachment that will be saved, some email signatures may contain logo files you wish to have ignored

Value is set at 25 in Figure 41

Default value = 0

DEFAULT (MS) BEFORE CHECKING CRM FOR RELATED ITEMS

Delay of the automatic CRM search.

(This allows the automatic search to be delayed in case of very fast navigation and clicking of emails).

(Value is set at 0 in Figure 41 = disabled)

Default value = 2000

DEFAULT (MS) BEFORE DISMISSING ERROR DIALOGS

Reaction time for error messages and unsuccessful search results.

(0 = no display of unsuccessful search results / display of error messages only)

Default value = 3000

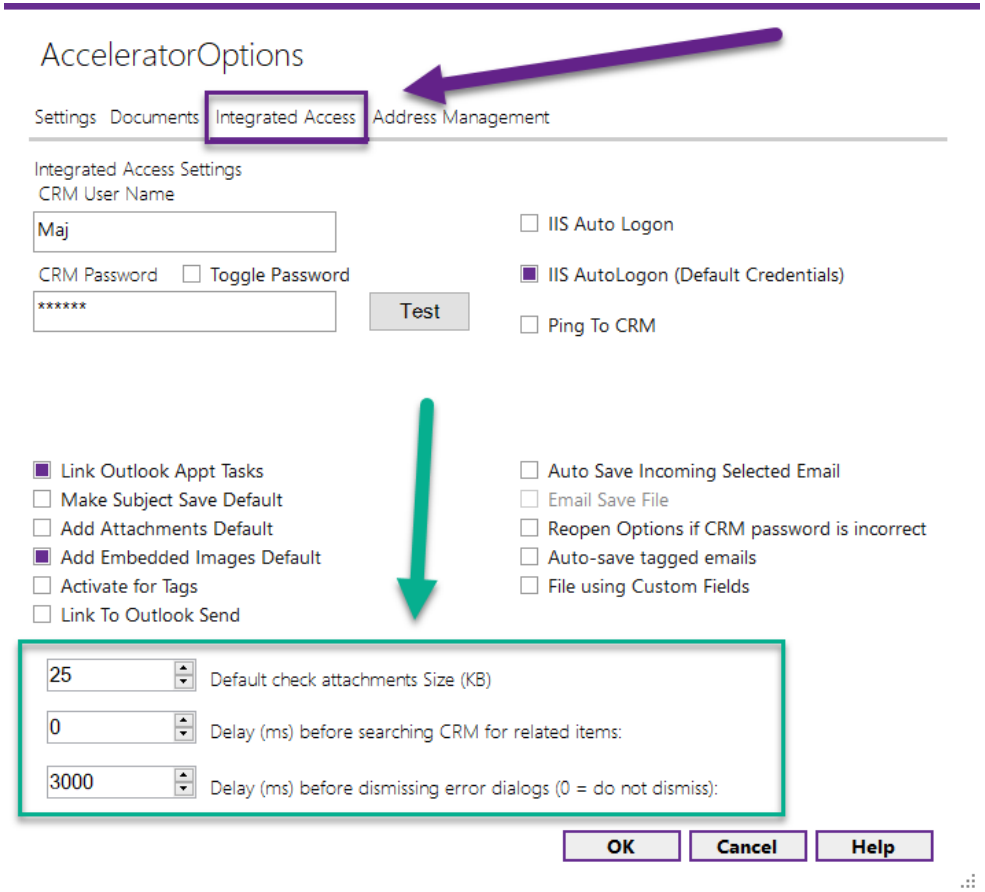
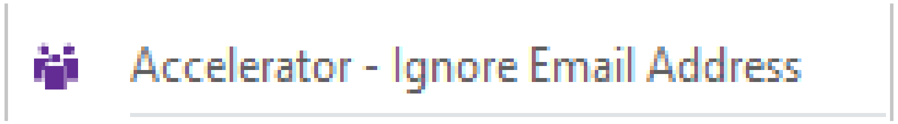


Figure 49 - Settings Tab 3

TAB 4: ADDRESS MANAGEMENT

Specifies for which email recipients automatic CRM storage and the automatic storage dialog box should not be enabled. (Applies to Managing Emails).

Please note: The list of excluded recipients can easily be expanded to inc lude additional recipients by right-clicking on an email. To do this, use the function: *Accelerator Ignore Email Address*.



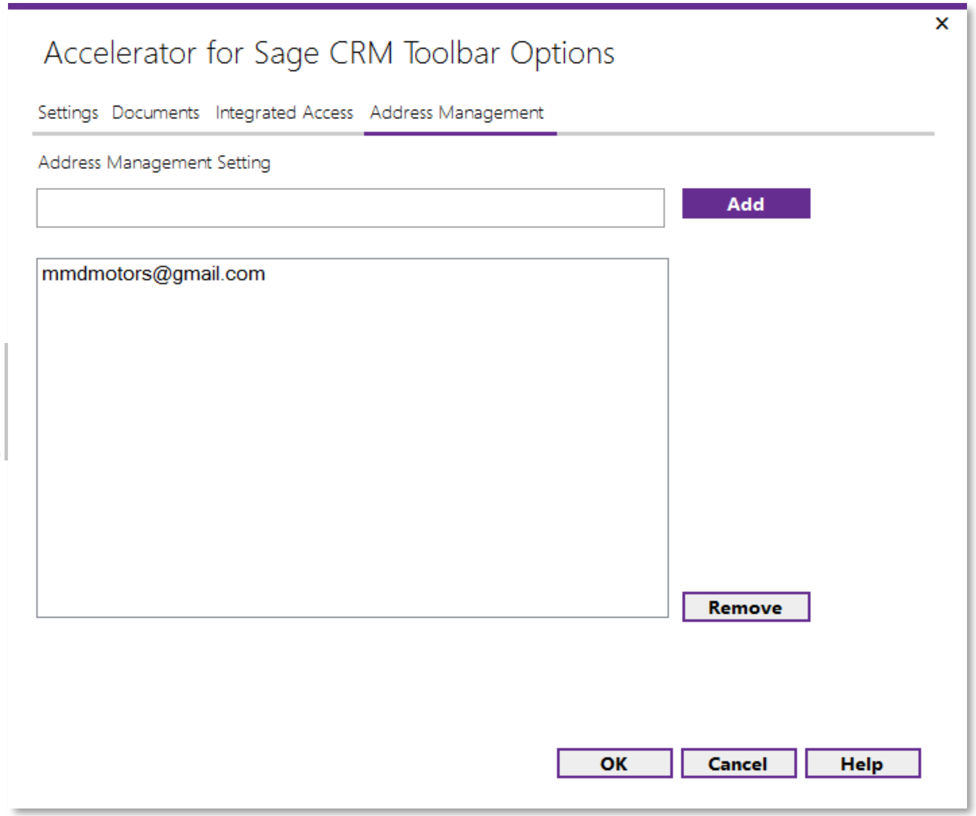


Figure 50 - Settings Tab 4