POWER TO RUN YOUR BUSINESS

sage

SageCRM

SageCRM 5.7

Quick Start Guide

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Chapter 1
Getting Started

Introduction

This guide gives you a quick start to core SageCRM functionality – Basic skills, Sales, Marketing, Customer Care, and Administration.

Basic SageCRM

With the functionality of basic SageCRM you can:

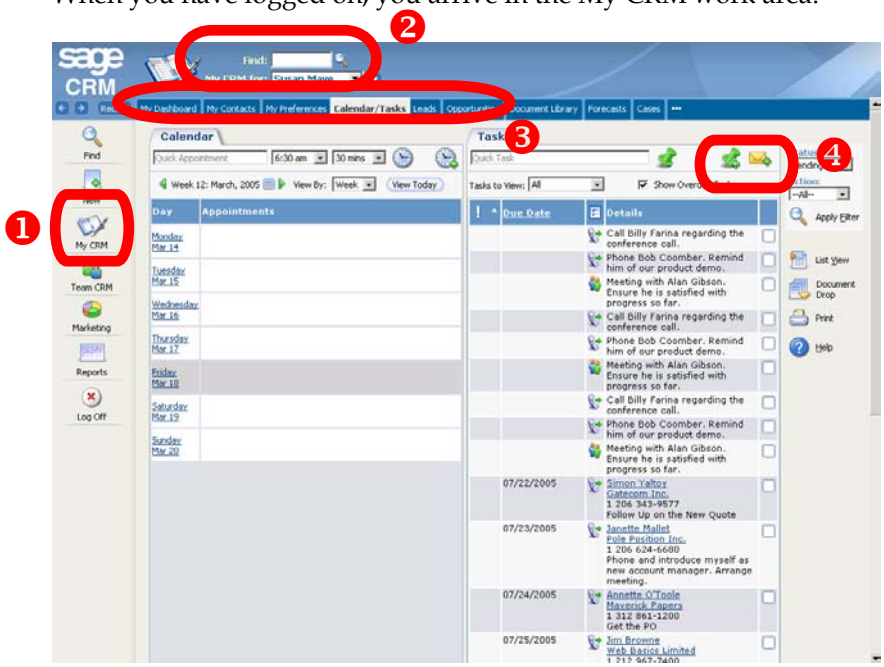
- Browse Customer Information
- Manage Your Time
- Track All Customer Interactions

This chapter takes you through a brief snapshot of some of the key tasks.

Each of the following chapters takes you through a brief snapshot of key tasks performed by various types of user.

Where's my stuff?

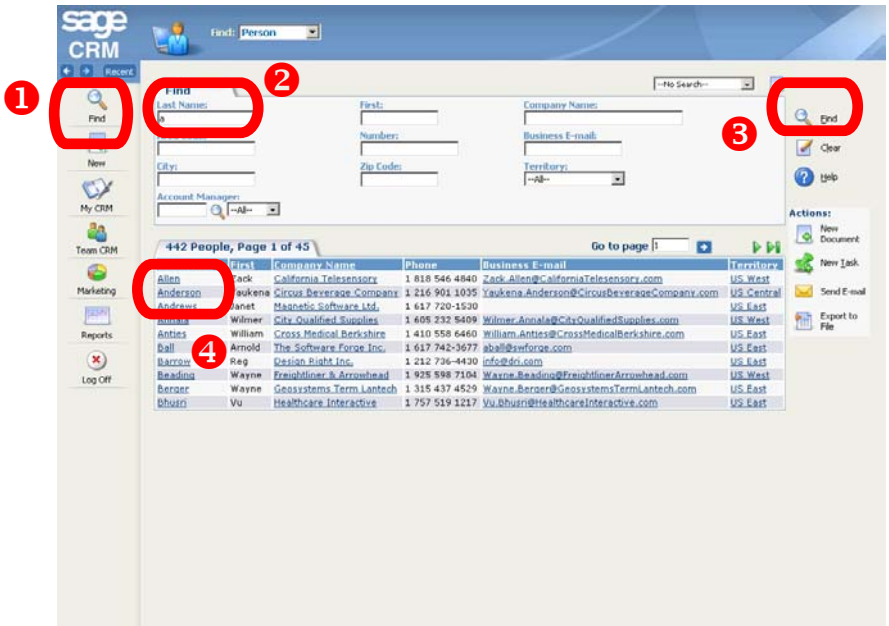
When you have logged on, you arrive in the My CRM work area.



1. Click on My CRM to get to your personal work area.
2. You can see whose work area it is from the name at the top of the screen.
3. Click on the different tabs to see what current appointments, opportunities, and personal settings you have.
4. Use the buttons at the top of the Calendar/Tasks tab to get busy and start filling up your diary.

Where's the rest of the stuff?

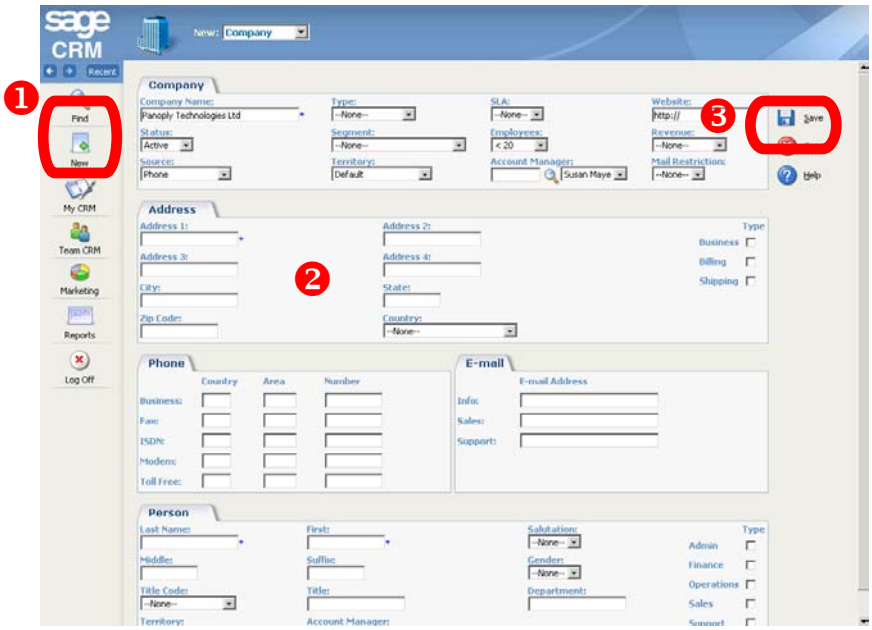
Say, for example, you are looking for a person.



1. Right-click on the Find menu button, and select the type of search from the Pop Out list. For example, Person.
2. Type in one or more search criteria if you want to—or leave these fields blank to see all the customer information.
3. Click on the Find action button to start the search.
4. Click on any one of the hyperlinks to drill down on the customer information.

How do I add my own real customer?

Have you got a real or imaginary business card there? Well go ahead, add it in!



1. Right-click on the New menu button, and select Company from the Pop Out list.

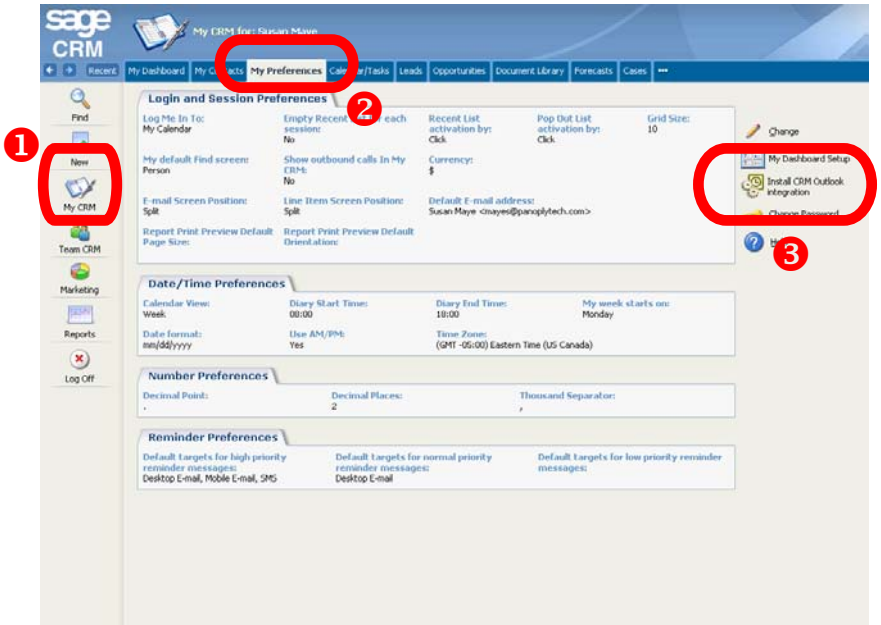
   You'll go through an initial "deduplication" screen—just type in the company name and click on the Enter Company Details button to proceed.

2. Then go ahead and add in the company, address, and main contact details.

3. Click on the Save button to add all the details into CRM.

How can I synchronize data with MS Outlook?

All you have to do is download the MS Outlook Plugin. Shutdown Outlook before you download the Plugin from CRM:



1. Select My CRM.
2. Click on the My Preferences tab.
3. Select the Install CRM Outlook Integration button.

   Verify and accept the security prompts and dialog boxes, then restart Outlook.

   When you restart Outlook, you should see new CRM Synchronization buttons on the toolbar. Tasks and Appointments less than seven days old, and those with a future date specified, automatically get synchronized when you select the Sync button in Outlook. Use the My Contacts tab in CRM to select contacts for synchronization with Outlook.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Marketing user.

If you are interested in going into more detail on the basic contact management areas touched on in this chapter, we suggest you check out the following sections of the SageCRM.com *User Online Help:*

- Getting Started
- Finding Information
- Working with Lists
- Adding Customer Information
- Appointments and Tasks
- MS Outlook Integration
- Managing Documents
- My Dashboard
- My Preferences

Chapter 2
Marketing

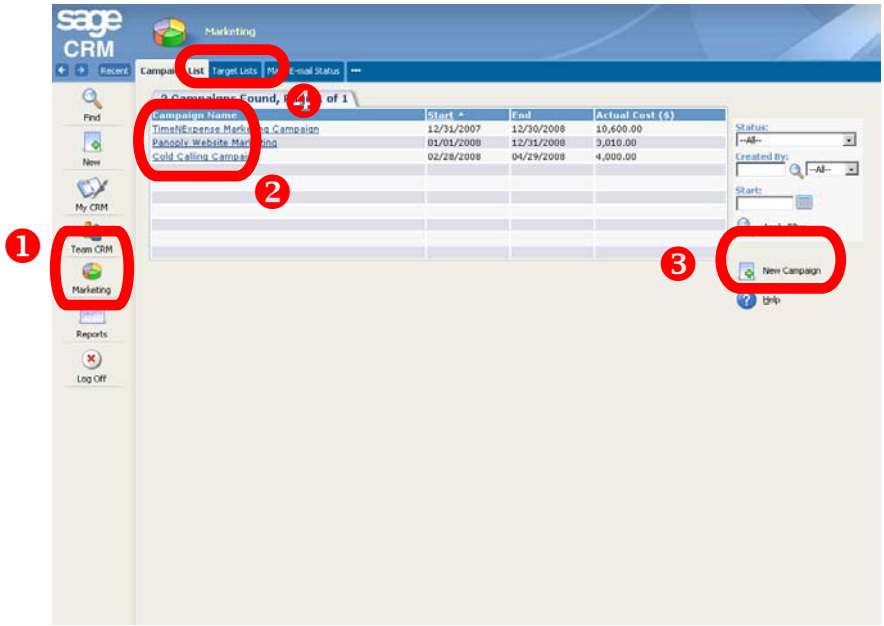
With SageCRM Marketing you can:

- Set up marketing campaigns and track their costs, effectiveness, and measure leads that turned into real business
- Set up dynamic sets of prospect profiling data
- Perform e-mail blasts to your prospect database
- Import and qualify raw lead data from your Web site or purchased contact lists
- Use outbound call lists for repetitive high volume phone-based campaigns

This chapter takes you through a brief snapshot of some of the key tasks.

Where is the control hub of Marketing?

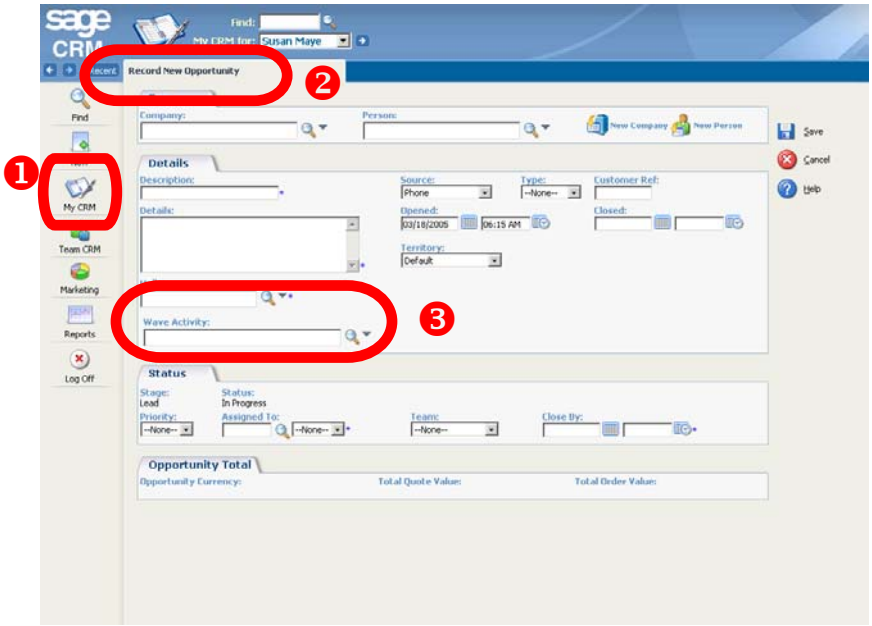
As a Marketing Manager, you will be responsible for setting up campaigns and performing database selections for those campaigns.



1. Click on the Marketing menu button.
2. The Campaign List tab shows you a list of all campaigns. They are all hyperlinked for you to drill down on the different phases or “Waves” and “Wave Activities”.
3. You can add a new campaign, with associated Waves and Wave Activities by clicking on the New Campaign action button.
4. The Target Lists tab allows you to make selections of data in the system and perform marketing actions against those lists.

What are Wave Activities good for?

Linking wave activities to leads, sales opportunities, and general customer interactions are key to tracking the effectiveness of your marketing efforts.

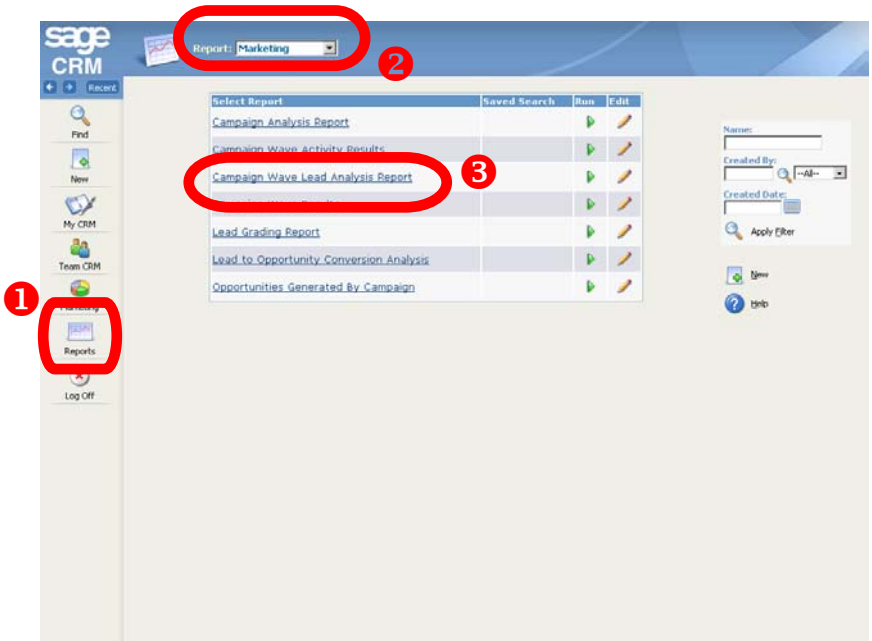


1. Click on the My CRM button, and select the Opportunities tab.
2. Clicking on the New Opportunity action button on the right-hand side of the screen displays the Record New Opportunity page.
3. The Wave Activity field allows you to link a sales opportunity to a specific phase of a Marketing campaign.

   The ability to link sales opportunities like this one, and also individual communications such as callbacks, and leads, to a phase or wave of a campaign persists throughout CRM. This means you can track every success or failure during the course of your campaign.

How can I measure the success of a Campaign?

Use one of the existing reports to see how you can track a campaign's effectiveness.



1. Click on the Reports menu button.
2. Select Marketing from the list in the context area of the screen.
3. Click on the hyperlink of the report called "Campaign Wave Lead Analysis Report".

   In the search criteria, set the Campaign Wave Name to contain "TimeNExpense", and run the report.

   This produces a report showing leads generated from the campaign wave and their current rating and status.

   You can select your report output to be on-screen in CRM, or in PDF or CSV format.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Sales user.

If you are interested in going into more detail on the Marketing areas touched on in this chapter, we suggest you check out the following sections of the SageCRM *User Online Help*:

- Leads
- Outbound Call Handling
- Running Reports and Writing Reports
- Campaign Management
- Target Lists

We also recommend checking out the following sections of the SageCRM *System Administrator Online Help:*

- Key Attribute Profiling

Chapter 3
Sales

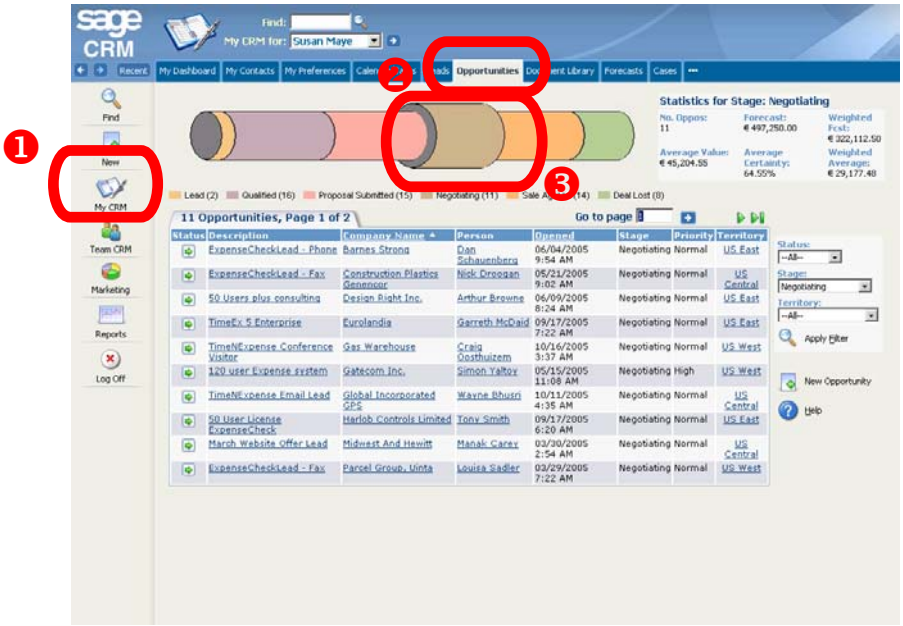
With SageCRM Sales you can:

- Track opportunities as they move through the sales cycle
- Create Quotes and Orders and link line items to them
- Assign opportunities and tasks to colleagues for team selling
- Report and analyze sales progress, forecasts, and lists

This chapter takes you through a brief snapshot of some of the key tasks.

What's in my Pipeline?

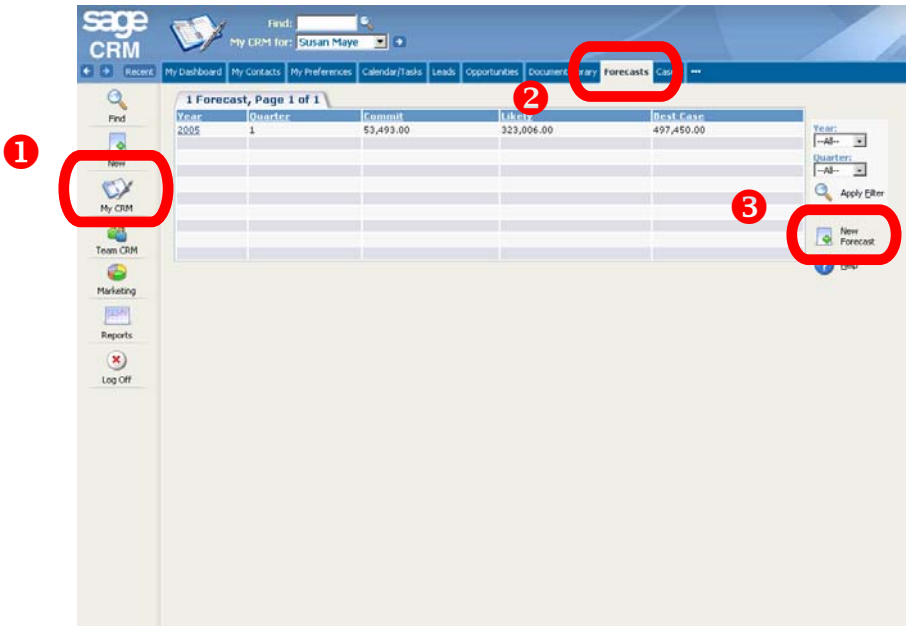
You can view a graphical and list representation of an individual's current sales pipeline.



1. Select My CRM.
2. Click on the Opportunities tab.
3. Click on a segment to toggle the drill down view.

My manager needs my forecast!

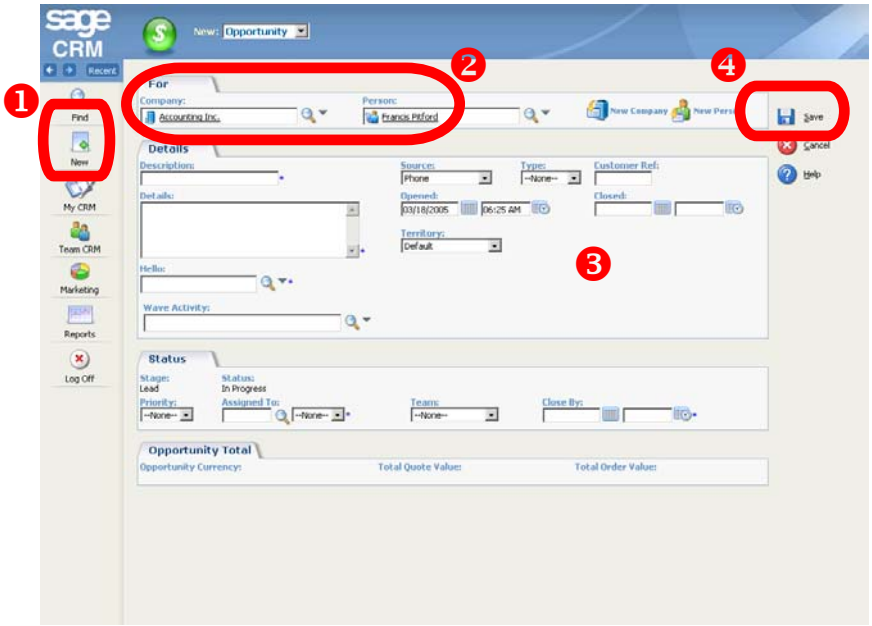
You can create and submit a new sales forecast.



1. Select My CRM.
2. Click on the Forecasts tab.
3. Click on the New Forecast button.

How do I capture a new Sales Opportunity?

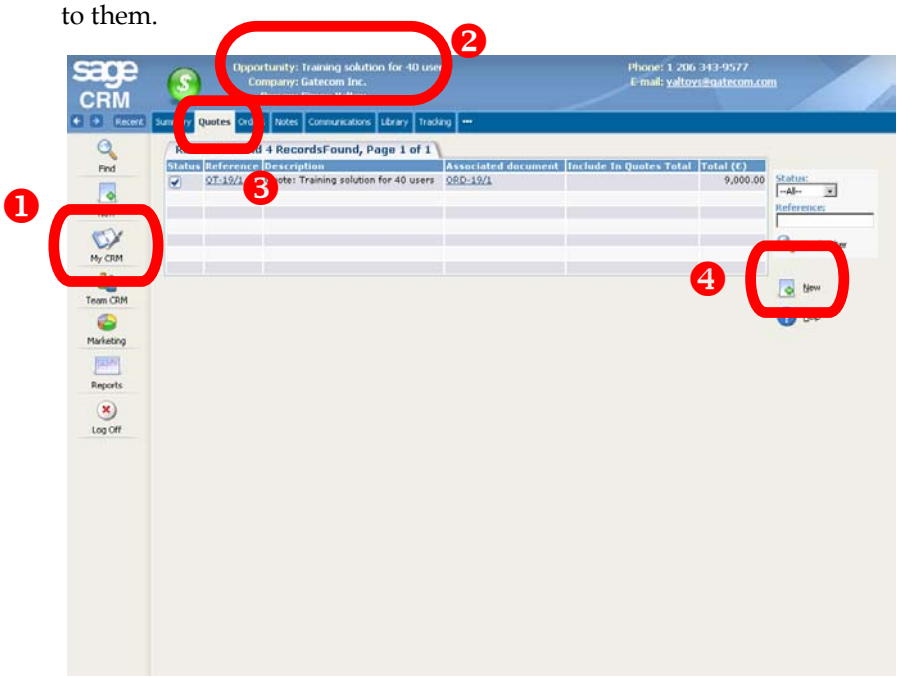
Say, for example, that one of your existing customers has a serious interest in your latest product.



1. Right-click on the New menu button, and select Opportunity.
2. Use the advanced search select buttons to set the For panel to link to the interested customer.
3. Fill in the Opportunity details.
4. Click on the Save button.

How do I create a Quote and turn it into an Order?

You can generate Quotes and Orders for your Opportunities, and link line items to them.

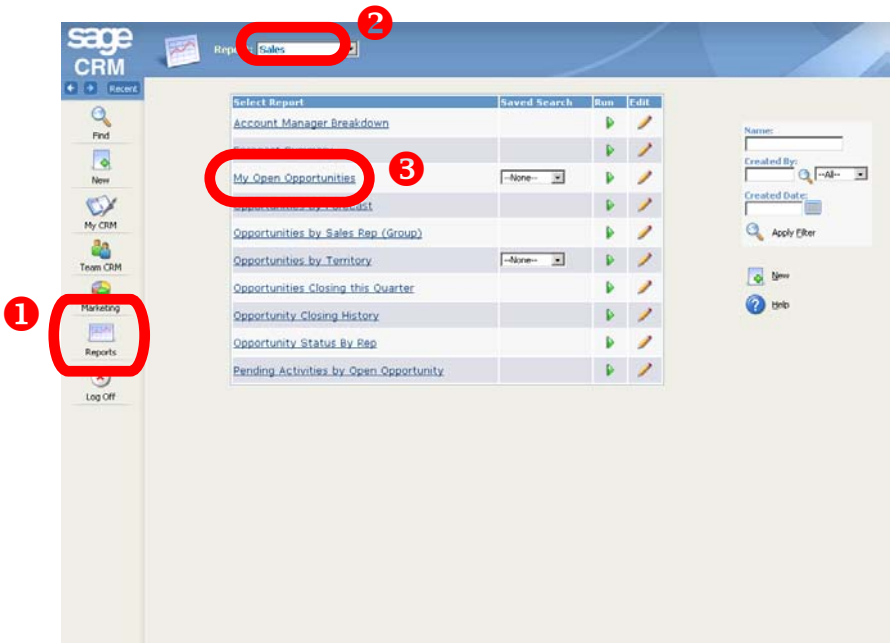


1. Click on the My CRM button, then select the Opportunities tab.
2. Click on the hyperlink of the relevant opportunity.
3. Click on the Quotes tab.
4. Click on the New action button on the right-hand side of the screen to create a Quotation. You can then enter Quote summary information, add line items, and select Next.

   A number of action buttons become available, giving you the option to promote the Quotation to an Order, create a printed version of the Quotation, and so on.

How can I get an overview of my progress?

Say, for example, you want to see a report of your current sales opportunities.



1. Click on the Reports button.
2. Select Sales at the top of the screen.
3. Click on the hyperlink of the My Open Opportunities report.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Customer Care users.

If you are interested in going into more detail on the Sales areas touched on in this chapter, we suggest you check out the following sections of the SageCRM *User Online Help*:

- Leads
- Sales Opportunities
- Sales Forecasting
- Running Reports and Writing Reports

Chapter 4
Customer Care

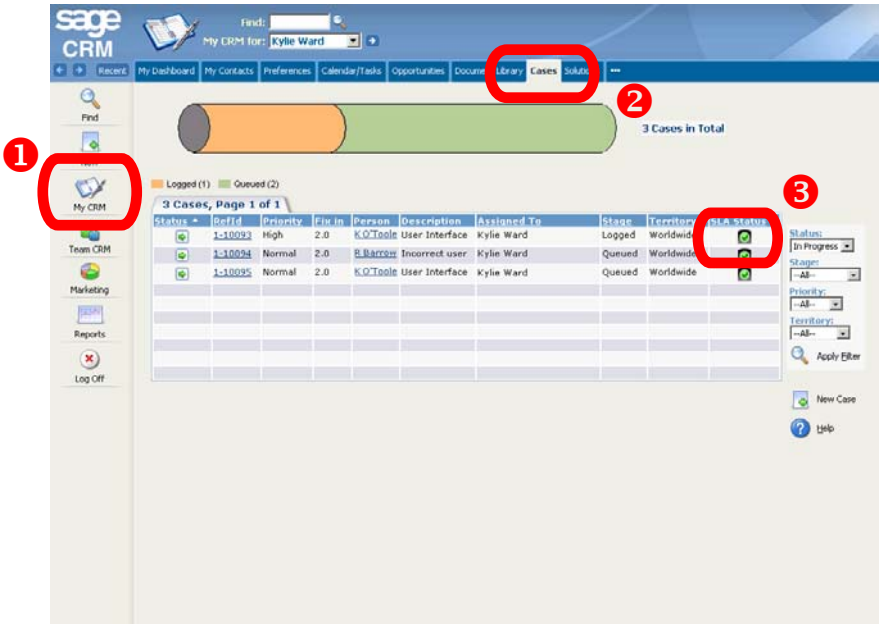
With SageCRM Customer Care you can:

- Log customer care calls
- Track customer care issues as they progress through to resolution
- Monitor Service Level Agreement adherence
- Publish solutions and perform key word searches of a solutions database
- Escalate overdue cases

This chapter takes you through a brief snapshot of some of the key tasks.

Where is my list of current Customer Care Issues?

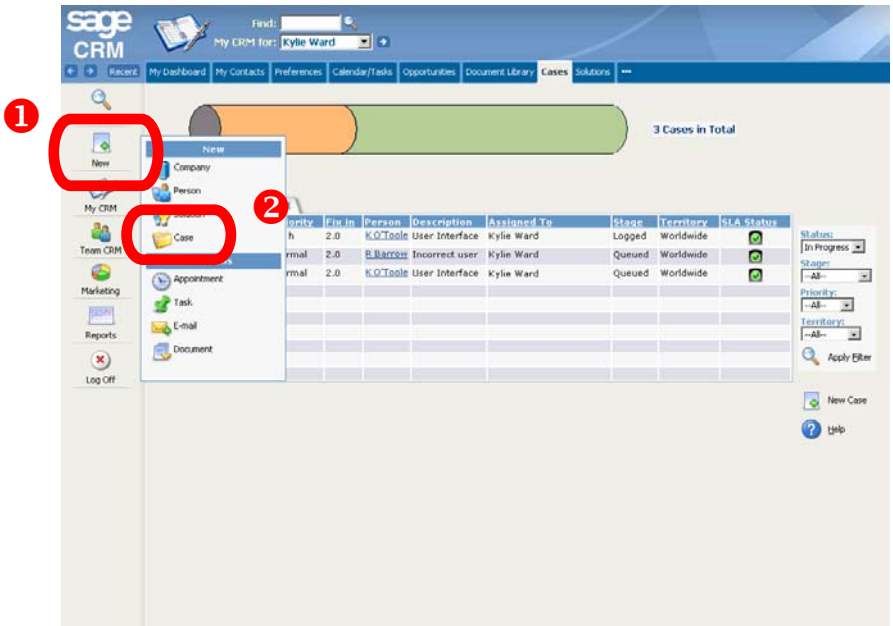
All of the Customer Care Cases that you are currently working on are accessed from the My CRM work area.



1. Select My CRM.
2. Click on the Cases tab.
3. The SLA Status column shows which cases are within, approaching, or breaching the Service Level Agreement (SLA) with the customer.

How do I log a new Customer Care Case?

You don't have to go far to add a new case.

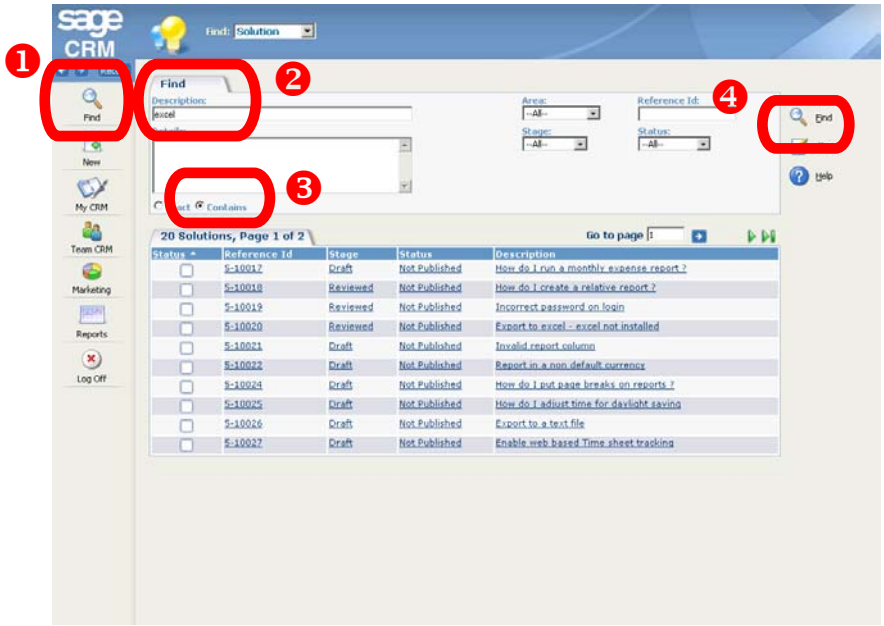


1. Right-click on the New menu button.
2. Select Case from the Pop Out list.

   Fill in the For panel on the New Case page to link the case to a customer record.

This one sounds familiar—how do I search the Knowledge Base?

If you think you might already have the answer to a customer care case, search your existing knowledge base of solutions first.

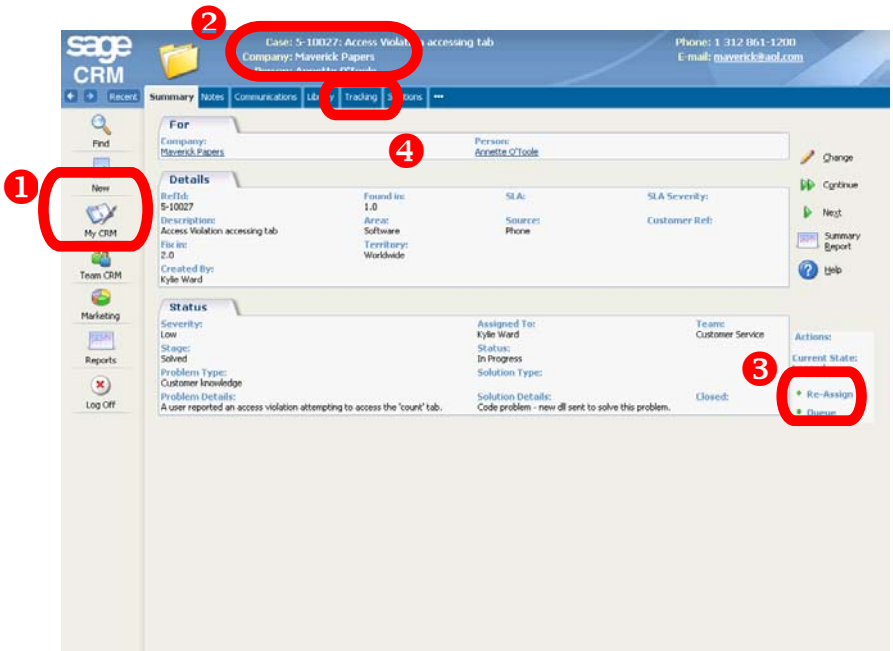


1. Right-click on the Find menu button, and select Solution.
2. Type a key word in the Description field. For example, **excel**.
3. Click the Contains button.
4. Click the Find action button.

   A list of all matching Solutions in the Knowledge Base is displayed. Click on the hyperlink of the Solution for more detail.

How do I update the Status of a Case?

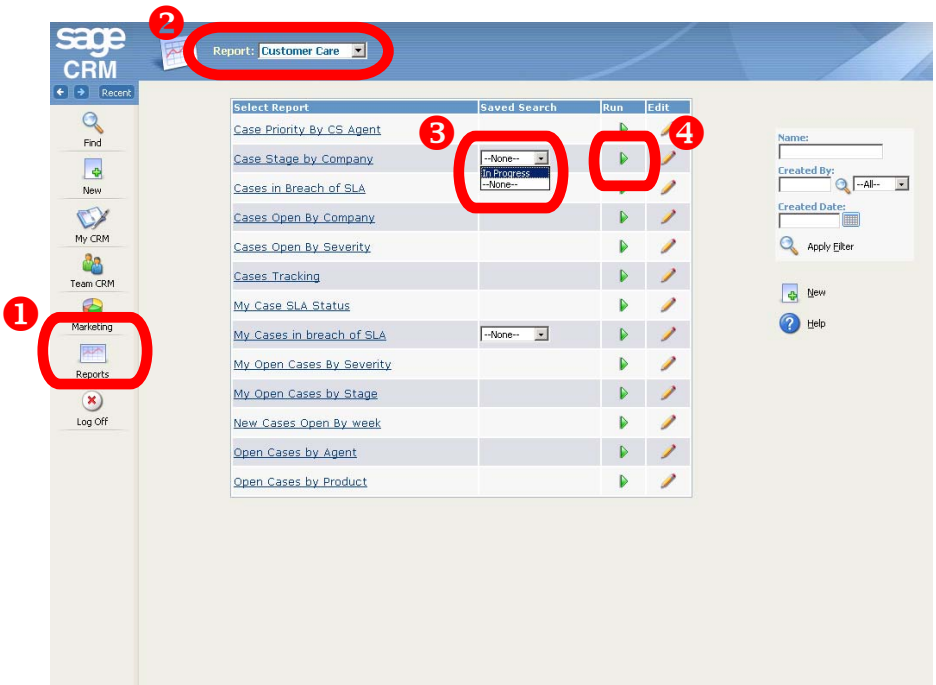
I've made progress, but I need an expert to test my resolution.



1. Select My CRM.
2. Select the Cases tab, and click on the hyperlink of any case with a status of "Solved". The case should be displayed at the top of the screen.
3. Click on the Re-Assign workflow bullet to pass this case on to a colleague.
4. All changes made to the case can be audited from the Tracking tab.

Which customer has the most open customer care issues?

A simple report can give you an overview.



1. Click on the Reports button.
2. Select Customer Care at the top of the screen.
3. For the Case Stage by Company report, select the In Progress saved search.
4. Click on the Run button.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Administrator users.

If you are interested in going into more detail on the Customer Care areas touched on in this chapter, we suggest you check out the following sections of the SageCRM *User Online Help:*

- Cases
- Knowledge Base
- Running Reports and Writing Reports

Chapter 5
Administration

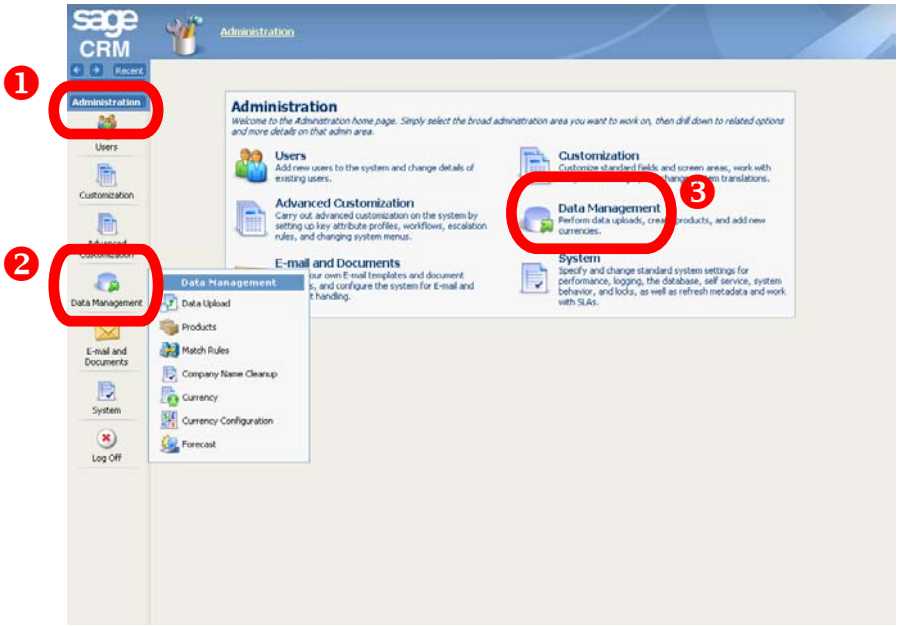
With SageCRM Administration you can:

- Customize field, screen, and list layout.
- Modify reports and document templates.
- Design and update business workflow processes.
- Change user setup and security access settings.
- Import data from CSV files.
- Set up business calendars and Service Level Agreements.

This chapter takes you through a brief snapshot of some of the key Administrator tasks.

How do I access the Administration area?

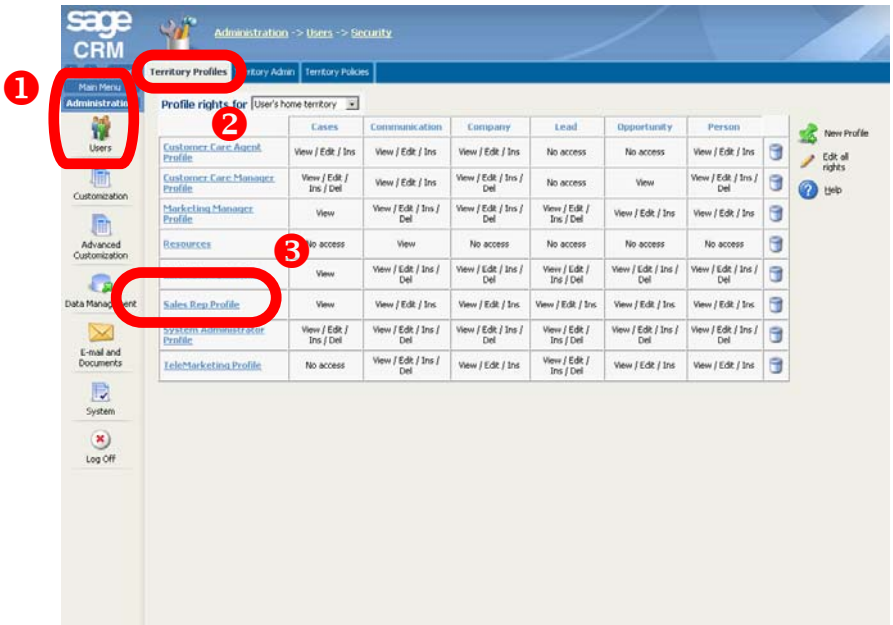
The Administration button is the gateway for all system administration tasks in CRM.



1. Select the Administration button to access the Administration menu and display the Administration home page.
2. Right-click on any of the Administration menu options and select an item from the pop out list to drill down to the administration area you want to work on.
3. Alternatively, select an option from the Administration home page to drill down to that option's home page. For example, selecting Data Management brings you to the Data Management home page.

How can I edit a User's Security Profile?

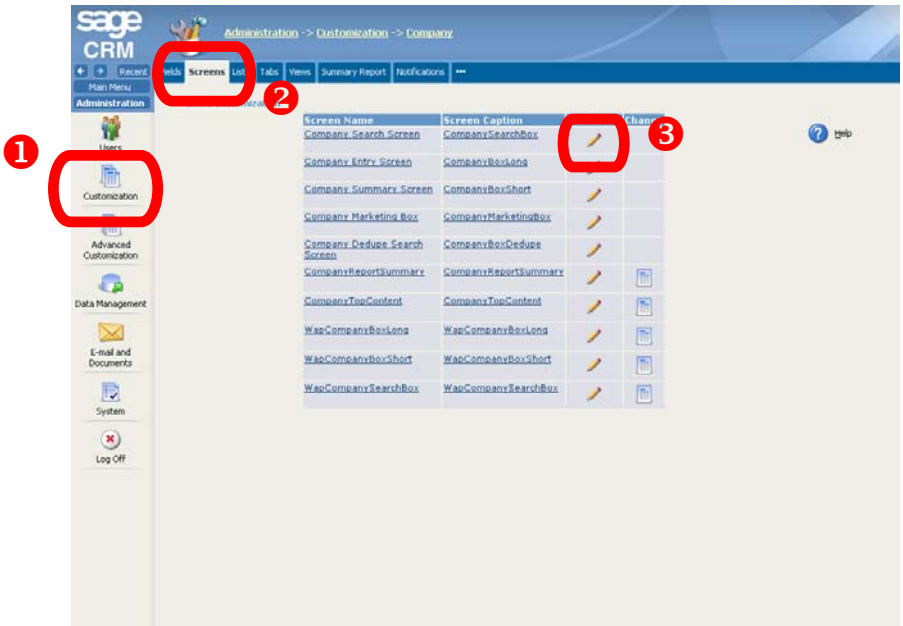
SageCRM allows you to set up permissions for users for accessing information stored in CRM. For example, a US user may only have access to sales information in their region.



1. Select Administration, then right-click on the Users menu button and select Security.
2. Select the Territory Profiles tab.
3. Select the profile you want to edit. This will show the access rights in edit mode, as well as all the users associated with this profile.

How do I change the Company Search screen layout?

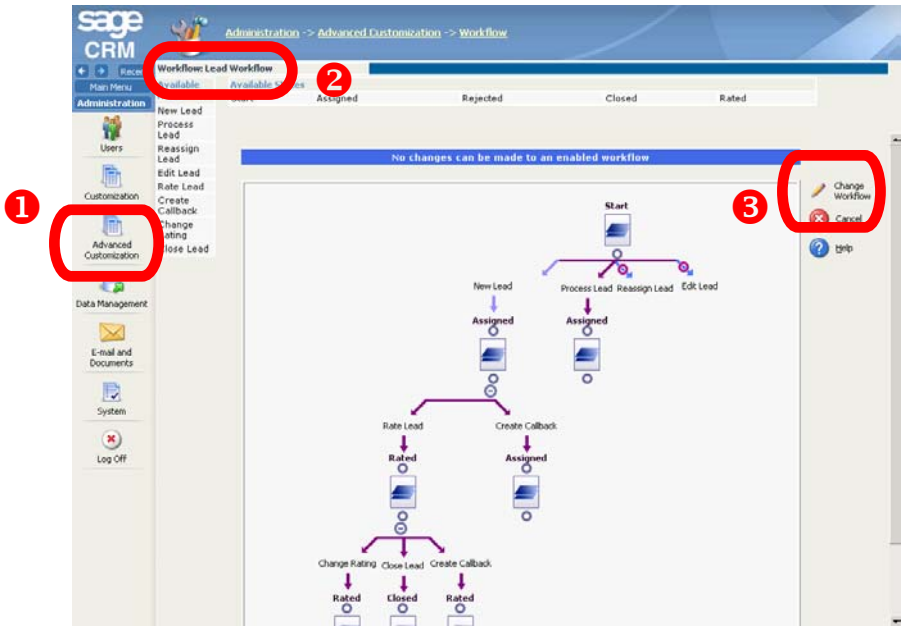
Want to switch the order of the fields on one of the screens?



1. Select Administration, then right-click on the Customization menu button and select Company.
2. Select the Screens tab.
3. Click on the Customize button next to the Company Search Screen.

How can I review the Lead Workflow design?

You can view, edit, and create new graphical workflows.



1. Select Administration, then right-click on Advanced Customization and select Workflow.
2. Click on the hyperlink of the Lead Workflow.
3. Click on the Change Workflow button.

What can I do next?

If you are interested in going into more detail on the Administrator areas touched on in this chapter, we suggest you check out the following sections of the SageCRM *System Administrator Online Help*. The sections that most budding Administrators go for straight away are:

- User Administration
- Field Customization
- Screen Customization
- Workflow Customization
- Data Upload
- Document Templates