



ACCELERATOR USER GUIDE

Accelerator is a third-party add-in providing an integration between Outlook and Sage CRM. You can update CRM data from Outlook: convert emails to companies, contacts, sales and cases. With Accelerator, you can file emails, attachments and log call information as well as tag outbound emails to customer service issues, jobs or opportunities. Accelerator is a great tool that provides an alternative to the standard Sage CRM Outlook Plugin.

Contents

Install Accelerator	3
Accelerator Settings	5
1. Settings	5
2. Documents	6
a. Version Information	6
b. Browser	6
c. Tagged	6
d. Clear Data Cache	7
3. Integrated Access	7
a. Integrated Access Settings	8
b. Logon Credentials	8
c. Default Options	8
d. Other Settings	9
4. Address Management	9
Viewing Accelerator on the Outlook Screen	10
1. Layout	10
2. CRM Status – Filed (Display in Outlook)	10
Accelerator Menu Buttons	11
1. Search Results	11
2. Details	12
a. New	12
b. Save Email	12
c. Options	13
Incoming Emails	18

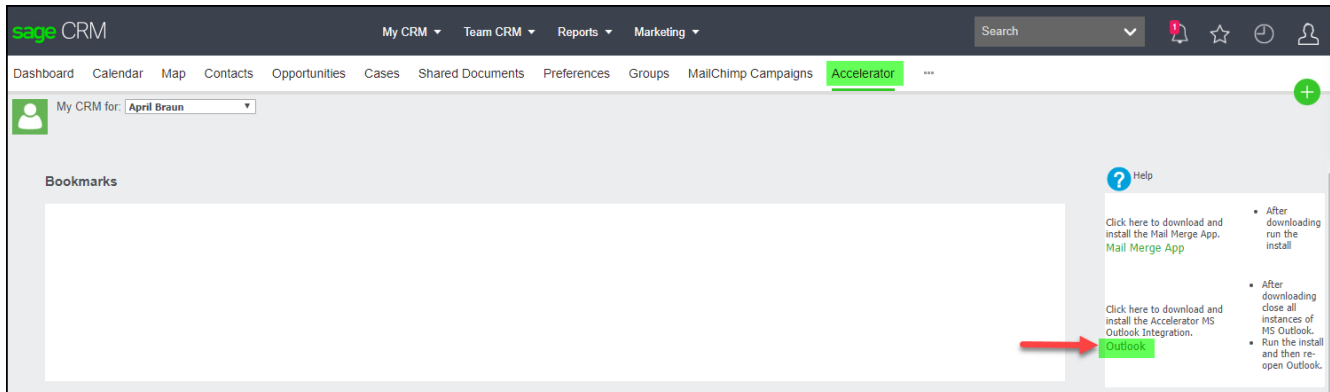


1. Email matching.....	18
2. Saving Emails.....	18
a. Filed For.....	19
b. Doc Settings.....	20
3. Finding & Displaying Stored Emails.....	21
Outgoing Emails.....	22
1. Assigning Sent Emails in CRM.....	22
2. New Email.....	22
a. CRM Search	22
b. Accelerator Ribbon.....	22
Accelerator Information Menu	24
1. Context-Specific Information	24
2. Bookmarks.....	25
Contact Us.....	26

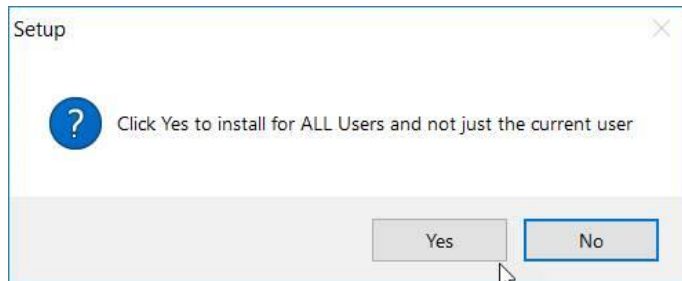
Install Accelerator

Please watch this video which explains steps 1-8: <https://www.screencast.com/t/C17CCHOHXIPd>

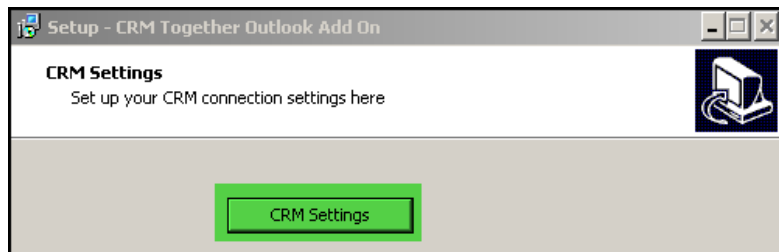
1. Close Outlook.
2. Log on to Sage CRM and click on the **Accelerator** tab.
3. Select **Outlook** to download and install the integration.



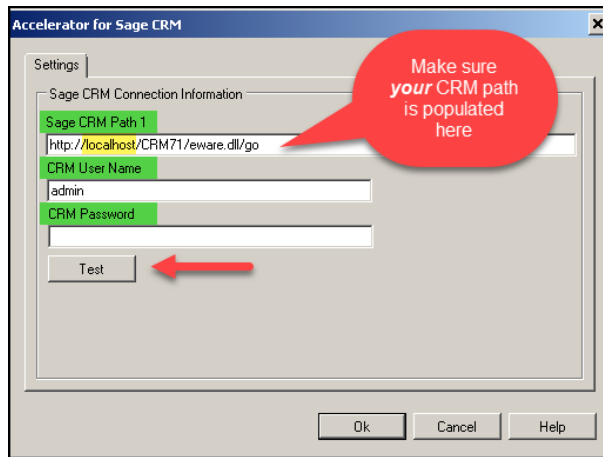
4. Click **Run** and follow the install instructions.
5. When asked if you want to install for all users, click **No**.



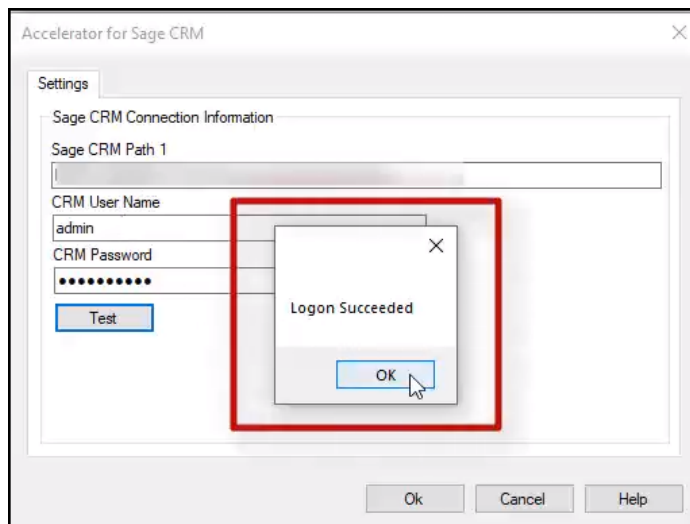
6. Select **CRM Settings**



- Confirm your CRM path and user/password (these should default into the fields). Select **Test**.

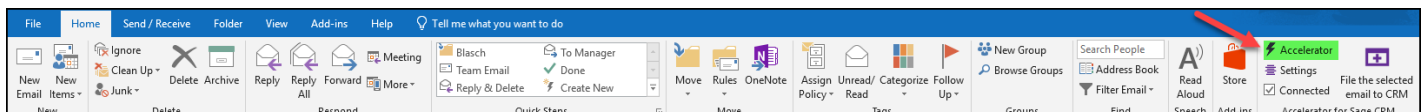


- If all settings are correct, you will receive a Logon Succeeded message.



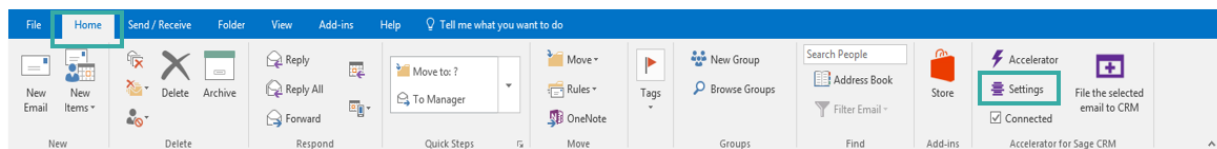
Click **Ok**.

- Once the installation is finished, open Outlook. The Accelerator icon will be in the top right corner of the Home tab:

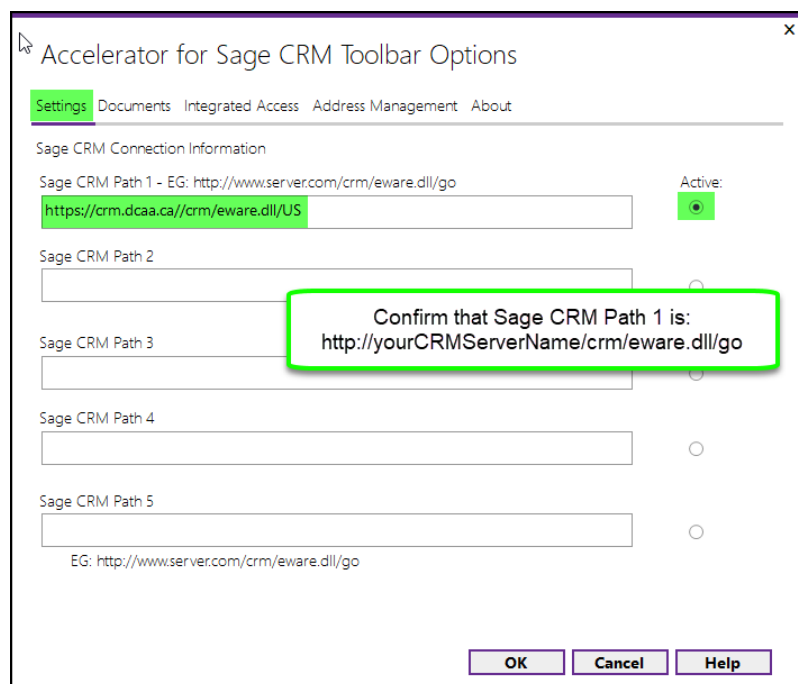


Accelerator Settings

Click **Settings** in the **Home** tab



1. Settings



Accelerator for Sage CRM Toolbar Options

Settings Documents Integrated Access Address Management About

Sage CRM Connection Information

Sage CRM Path 1 - EG: <http://www.server.com/crm/eware.dll/go> Active: ☒

<https://crm.dcaa.ca/crm/eware.dll/US>

Sage CRM Path 2

Sage CRM Path 3

Sage CRM Path 4

Sage CRM Path 5

EG: <http://www.server.com/crm/eware.dll/go>

OK Cancel Help

Confirm that Sage CRM Path 1 is:
<http://yourCRMServerName/crm/eware.dll/go>

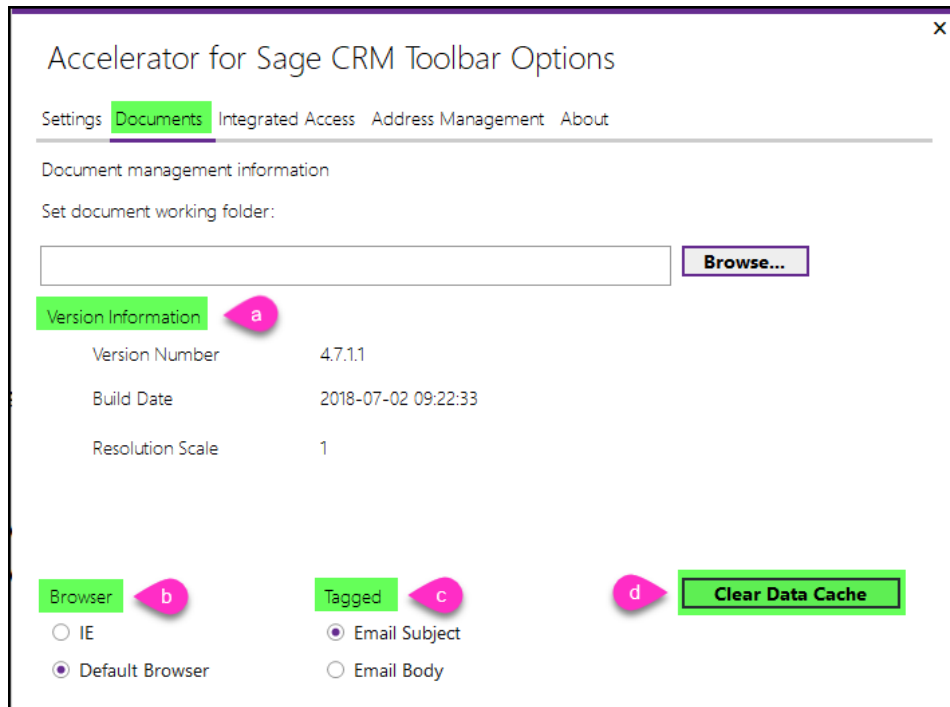
Please note:

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>

2. Documents



- a. Version Information
- b. Browser

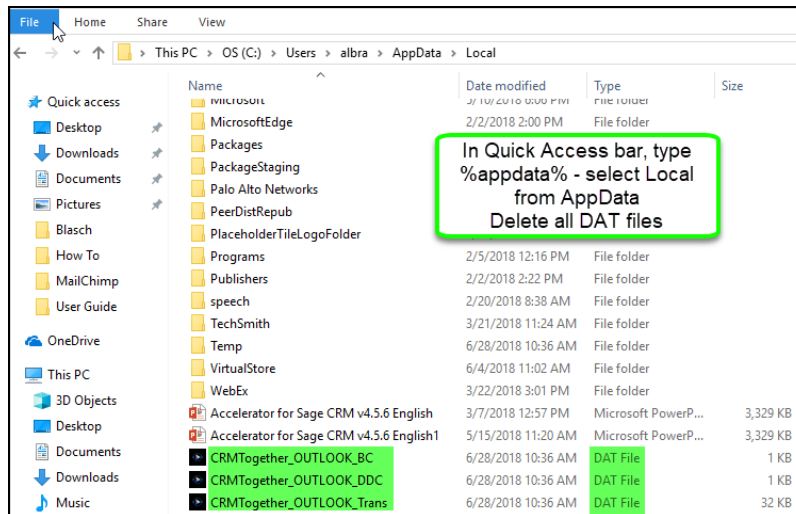
The default setting is for IE, but if you use a different browser, you can change this by selecting 'Default Browser'

- c. Tagged

The default setting is for tags to be inserted into the email subject. You also have the option to add the tag to the email body instead of the subject. (See **Accelerator Menu Buttons – Options** for more details.)

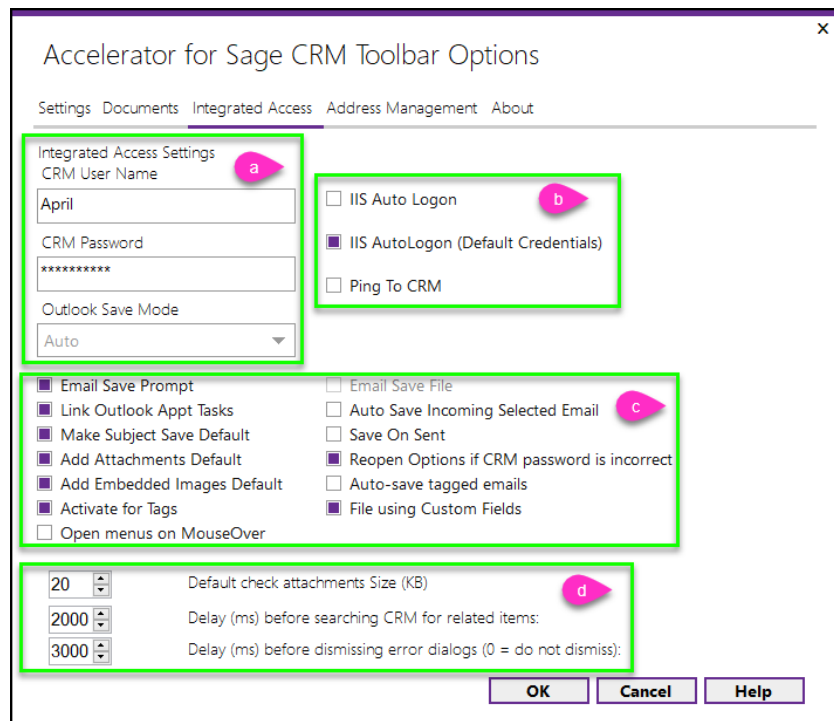
d. Clear Data Cache

Occasionally, the data cache needs to be cleared for troubleshooting purposes. If the clear fails, it can be cleared manually:



3. Integrated Access

Recommended user settings:



a. Integrated Access Settings

CRM User Name/Password = Your Sage CRM login username and password

Outlook Save Mode = determines whether Accelerator automatically prompts the user to file outgoing emails in CRM or if the filing in CRM takes place manually

b. Logon Credentials

Use IIS AutoLogon (Default Credentials)

c. Default Options

Email Save Prompt = determines whether the storage dialog box is used when saving emails

Link Outlook Appt Tasks = extends the MS 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 by our technicians.)

Make Subject Save Default = determine whether only the email message subject or the message subject *and* message content is saved as a suggestion in the dialog box

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

Add Embedded Images Default = allows the user to specify whether they save embedded images within the email

Activate for Tags = opens the Accelerator pane (if closed) when a tagged email is selected

Open Menus on MouseOver = opens the menus on mouseover instead of having to click

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)

Auto Save Incoming Selected Email = automatically saves incoming emails in CRM upon first reading without use of the storage dialogue box

Save on Sent = automatically saves sent emails in CRM upon sending without use of the storage dialogue box

Reopen Options if CRM password is incorrect = dialog box prompting the entry of login information in case of unsuccessful connection to the CRM system

Auto-save Tagged Emails = automatically save selected email if it is tagged

File using Custom Fields = enables editing custom fields before filing mail to CRM

d. Other Settings

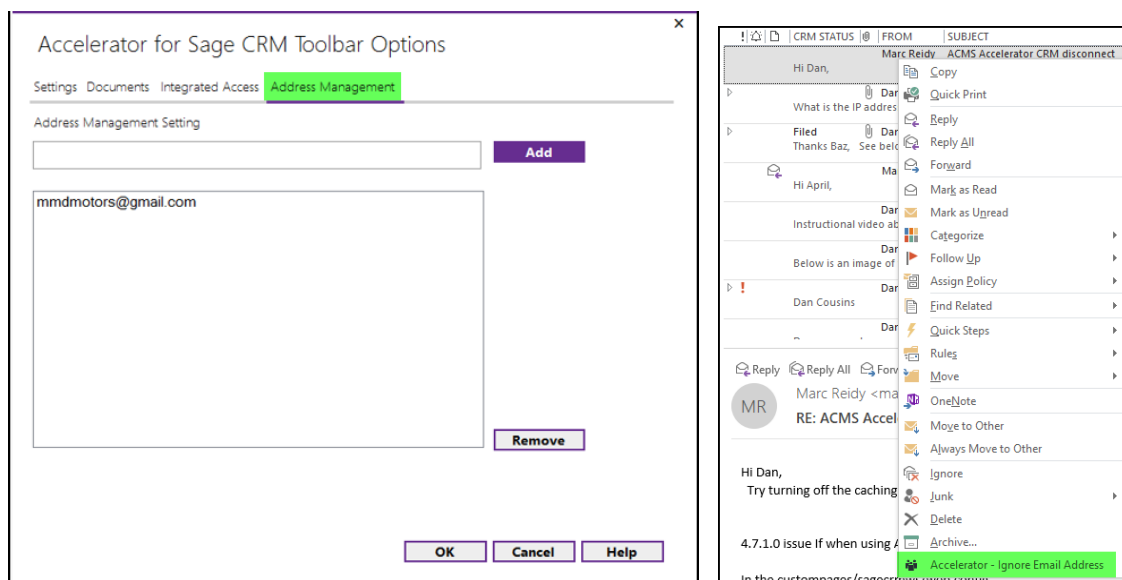
Default check attachments Size (KB) – indicates a minimum size of attachment that will be saved . . . some email signatures contain logo files you don't want to file

Delay (ms) before searching 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 email clicks; 0 = disabled)

Delay (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)

4. Address Management

Specifies for which email recipients automatic CRM storage and the automatic storage dialog box should **not** be enabled.

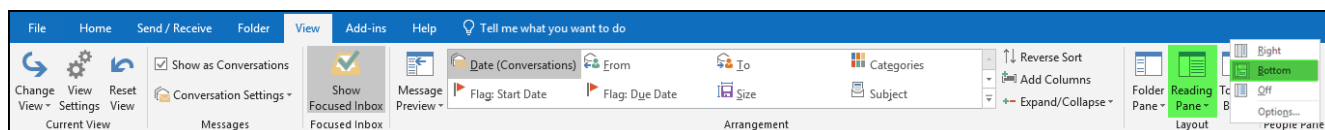


Please note: the list of excluded recipients can easily be expanded to include additional recipients by right-clicking on an email. Use the function: **Ignore Email Address**.

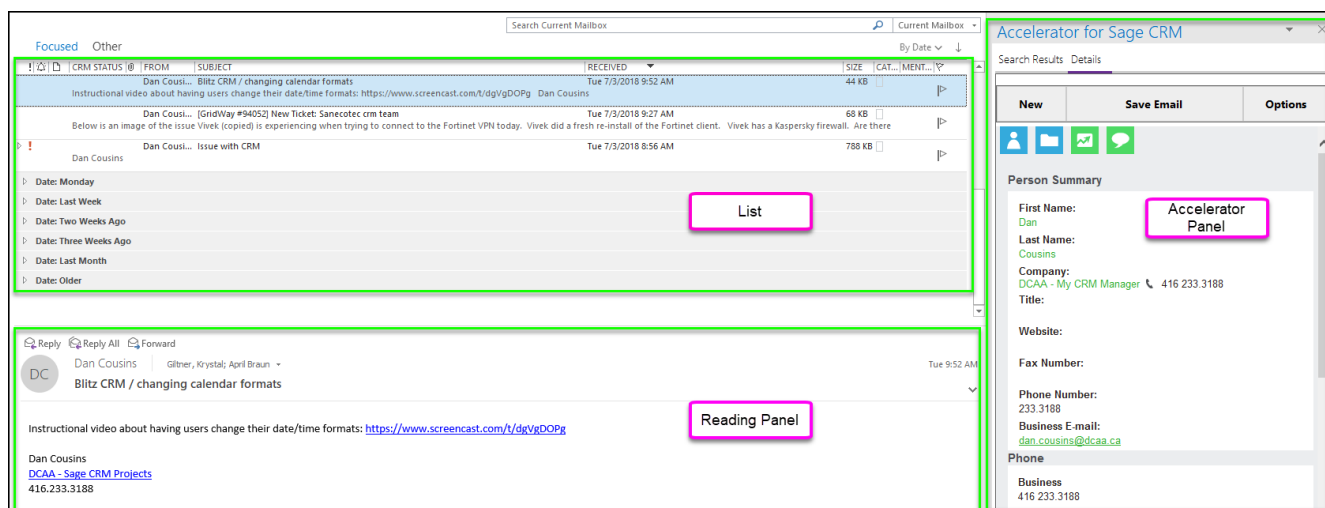
Viewing Accelerator on the Outlook Screen

1. Layout

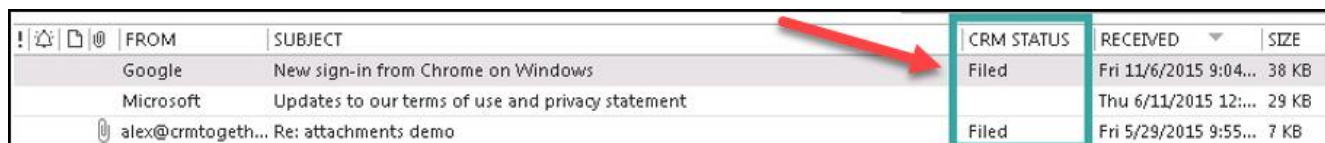
To change the layout of the Outlook screen to accommodate the addition of the new Accelerator panel, select the **View** tab and click on **Reading Pane** and choose **Bottom**



Sample Outlook Layout:



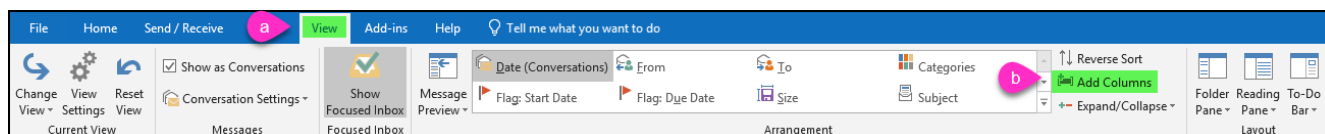
2. CRM Status – Filed (Display in Outlook)



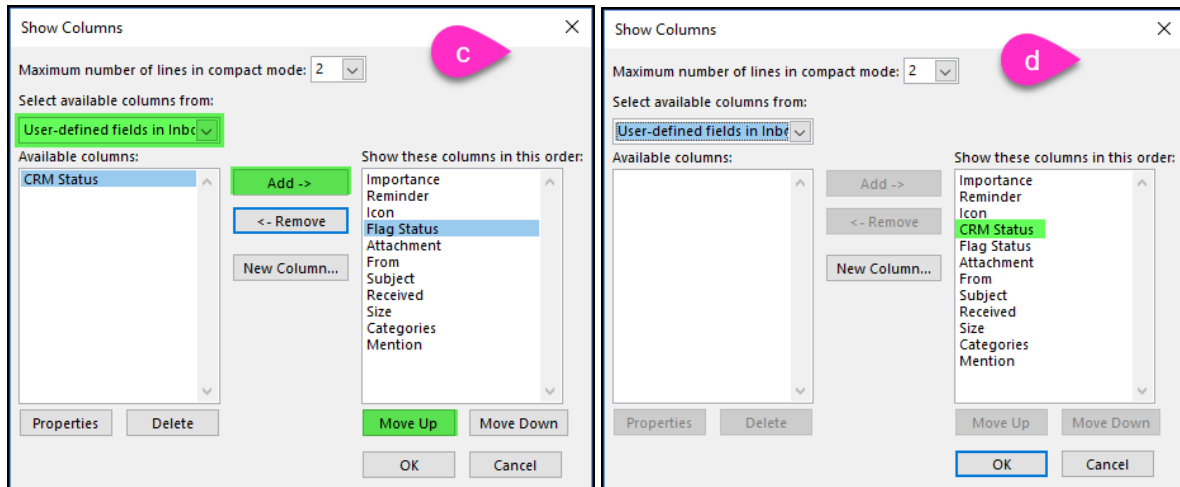
To display if the email has been filed using Accelerator:

Note: This status field is only displayed *after* the first email has been saved/stored in CRM and is then available for setup as described above.

- Select the **View** tab
- Click on **Add Columns**:



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



Note: this has to be done for each saved folder (ie. Inbox, Sent Items, etc). To create a new view that allows the status field to display in *all* subfolders, please watch:

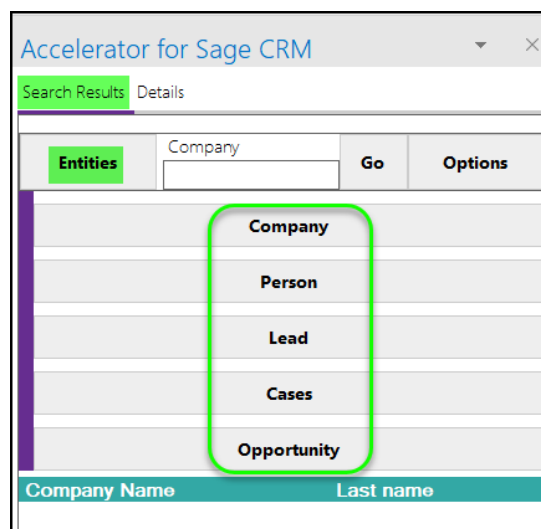
<https://www.screencast.com/t/EXBvb11iK>.

Accelerator Menu Buttons

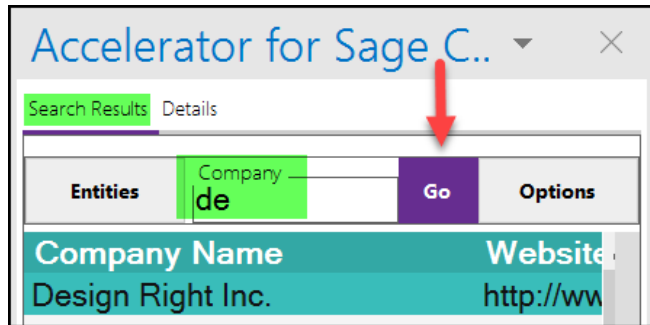
1. Search Results

Allows you to search for an entity or use your bookmarks and save any email against any existing record.

Entities – choose the entity



Enter part of entity description in the search box and select **Go**.



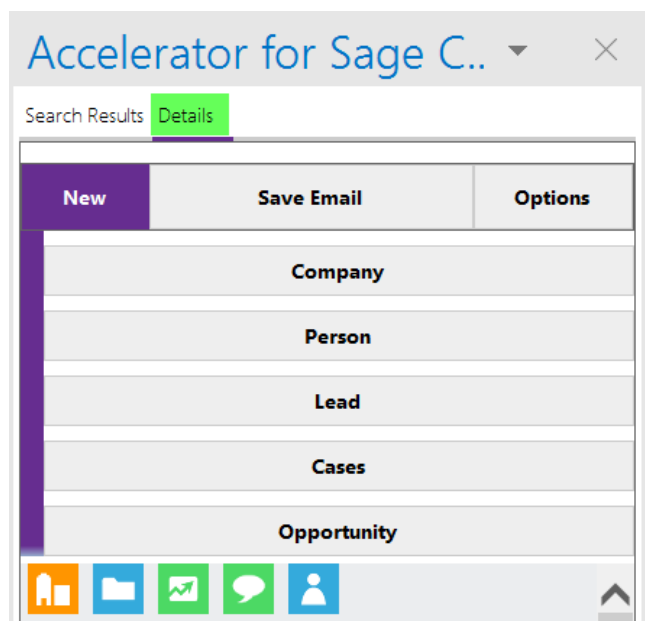
To view the record from the grid just double click on the line item. This will then open the **Details** tab and show you the entity page.

2. Details

a. New

Option allows you to create a new Entity based on the data in the email

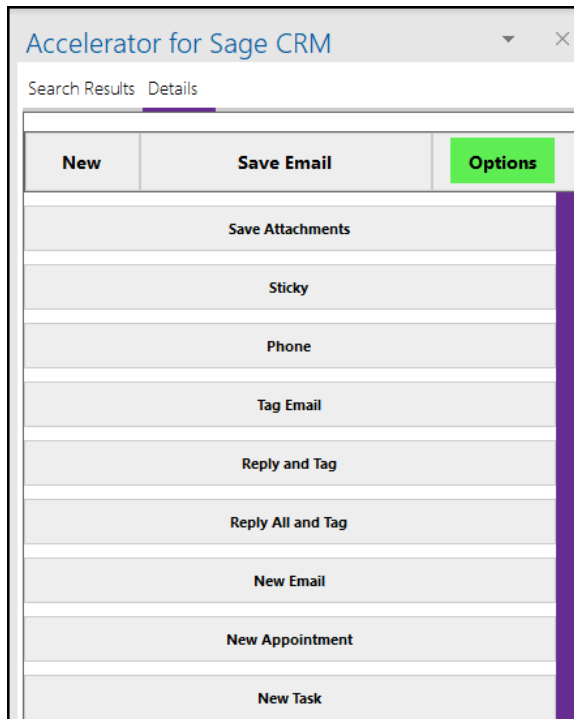
Note: while you can create a new case, person or opportunity from here, a best practice is to first go to the correct company or person record.



b. Save Email

Allows you to save the email as a communication 'Email In' against the current record . . . see *Incoming Emails*

c. Options



Accelerator for Sage CRM

Search Results Details

New Save Email Options

Save Attachments

Sticky

Phone

Tag Email

Reply and Tag

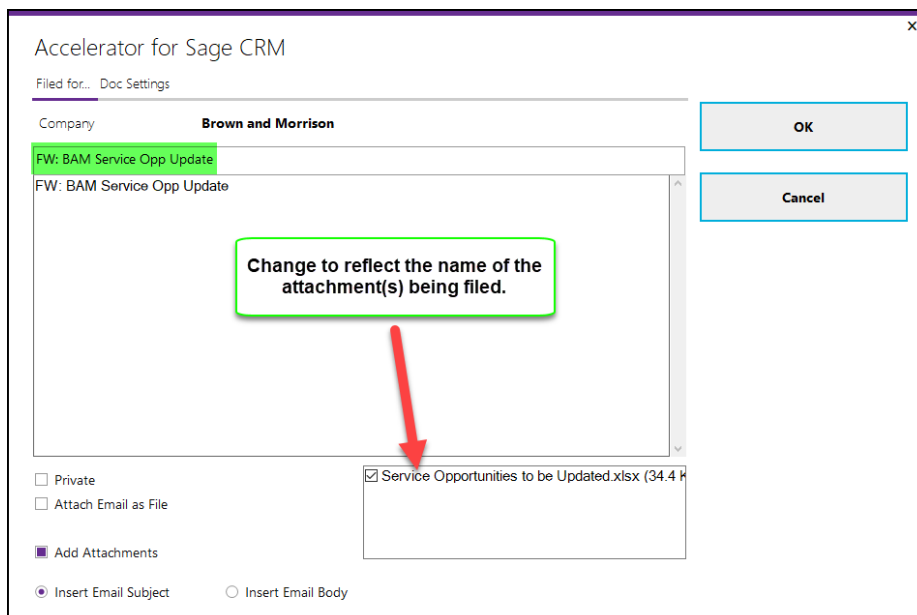
Reply All and Tag

New Email

New Appointment

New Task

Save Attachments – allows you to save only the attachments and not the email. Be sure to change the Document Description accordingly as it defaults with the email subject.



Accelerator for Sage CRM

Filed for... Doc Settings

Company Brown and Morrison

FW: BAM Service Opp Update

FW: BAM Service Opp Update

Change to reflect the name of the attachment(s) being filed.

☐ Private

☐ Attach Email as File

☒ Add Attachments

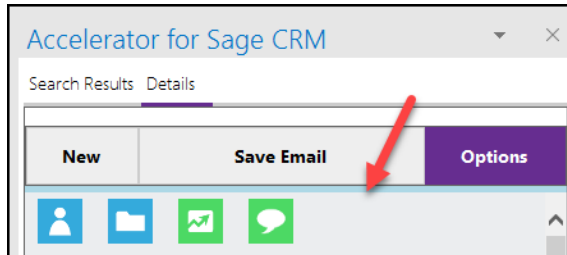
☒ Insert Email Subject ☐ Insert Email Body

☒ Service Opportunities to be Updated.xlsx (34.4 K)

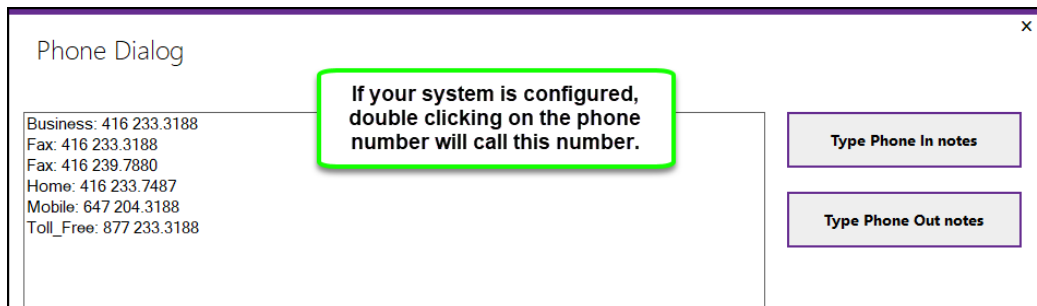
OK

Cancel

Sticky – freeze the Accelerator panel on a record. This is practical because you can then assign multiple email messages to that CRM context without the panel 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 **Sticky**.

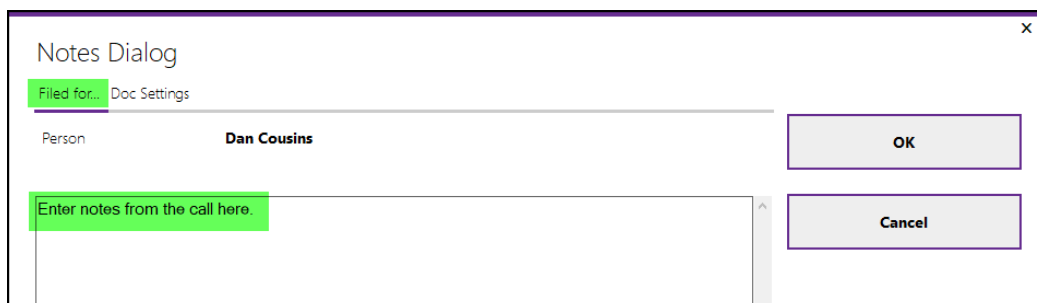


Phone – view the phone information and enter incoming/outgoing calls (added to CRM as a communication record)

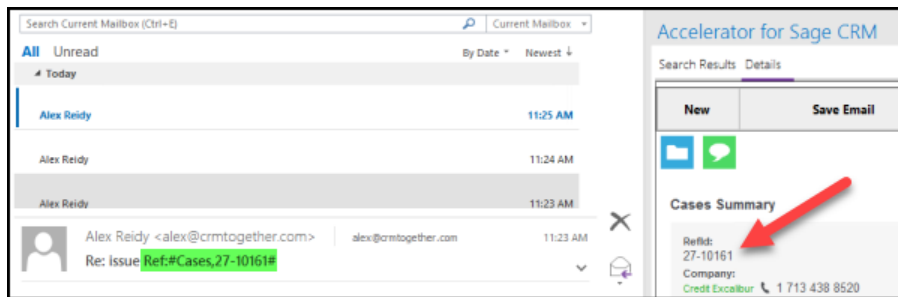


Note: Calls can be made if the "callto:" function is supported by your CTI system (Ex. Skype).

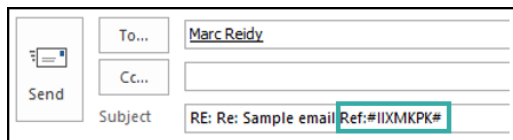
To record a communication, click on 'Type Phone In notes' or 'Type Phone Out notes' button and fill in the details of the call.



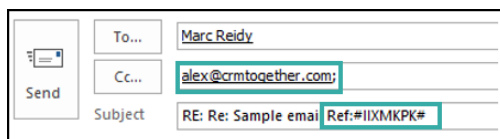
Tag Email – adds a reference number to the subject line which serves to create and open the associated reference in case of incoming emails from the reference (Example: you receive an email that needs to reference an existing CRM case. Search for the company and then select the Case icon. Find the case and then click on Tag Email. The case number will be referenced in the email subject line.)



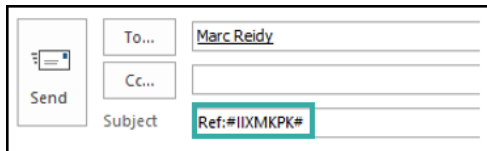
Reply and Tag - opens the Outlook dialog box for replying to an email. The Accelerator pane will already be open in the dialog box for the reply email and display the reference context from the main screen. The reference ID (tag) is added to the subject line, which serves to create and open the associated reference in case of incoming emails from the reference and for other users within the organization.



Reply All and Tag - opens the Outlook dialog box for replying all to an email. The Accelerator pane will already be open in the dialog box for the reply email and display the reference context from the main screen. The reference ID (tag) is added to the subject line, which serves to create and open the associated reference in case of incoming emails from the reference and for other users within the organization.

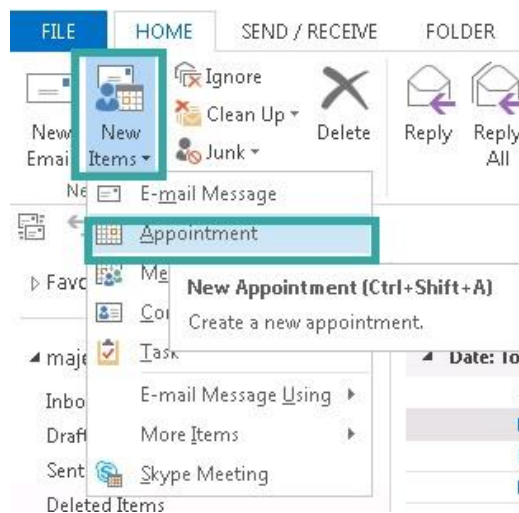


New Email – opens the Outlook dialog box for creating a new email. The Accelerator pane will already be open in the dialog box for the new email and display the reference context from the main screen. The reference ID (tag) is added to the subject line, which serves to create and open the associated reference in case of incoming emails from the reference and for other users within the organization.

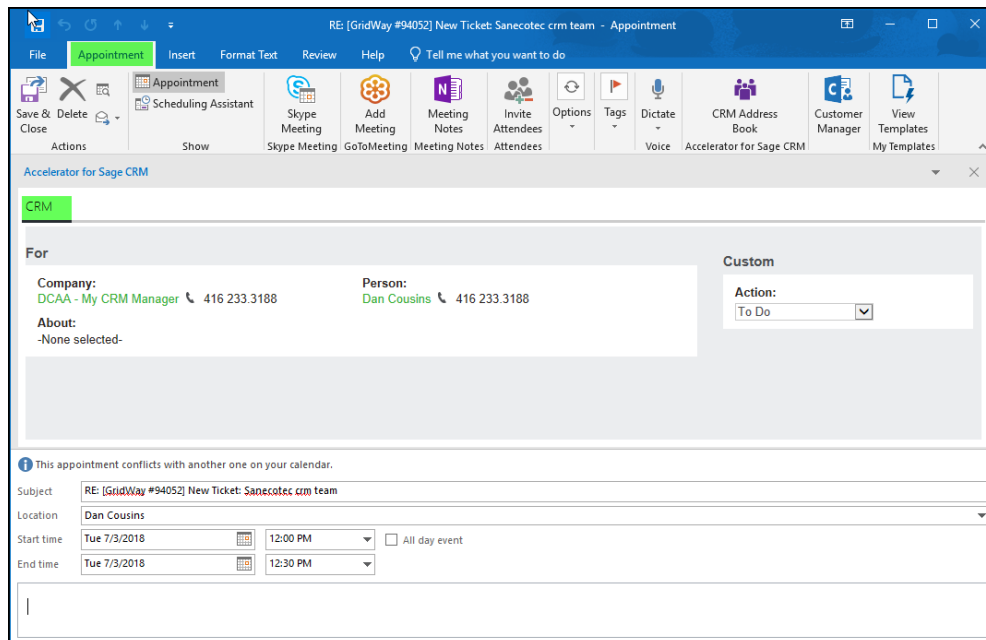


New Appointments

From Outlook menu bar: New Appointment or New Task



The Outlook entry screen is extended with Sage CRM fields that are preset with entity data from the context screen:

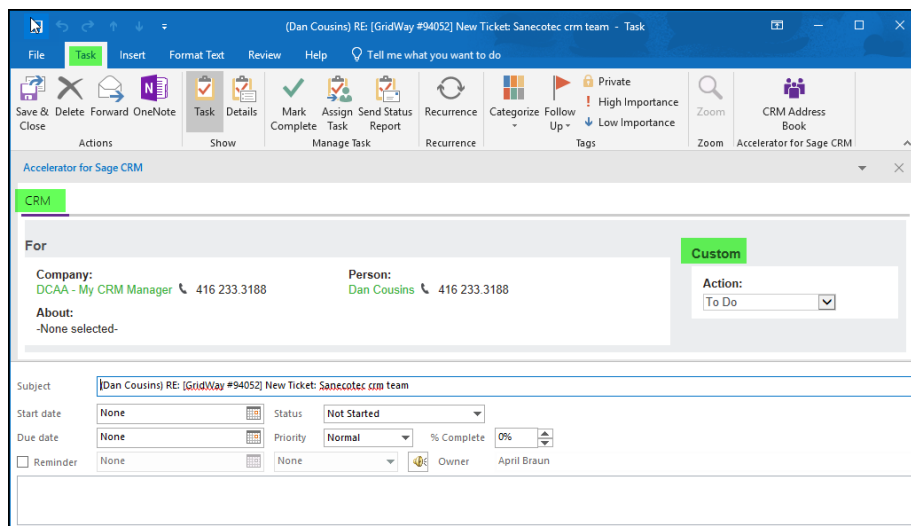


Fill in the CRM fields, search for the entity the appointment/task is relevant to and save.

Accelerator menu button: New appointment/task

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



Incoming Emails

1. Email matching

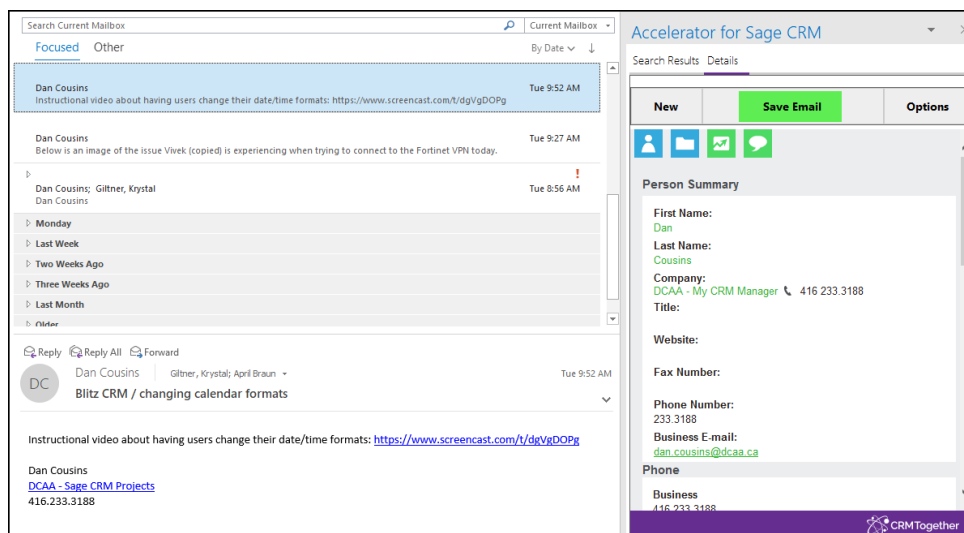
When an email is received, Accelerator will search on the email and display the person details.

Accelerator attempts to match the email in the following order:

- Tag match – check that there is a tag and if so, search CRM based on that.
- Email Person – check for person with same full email address
- Email Company – check for a company with matching email domain

2. Saving Emails

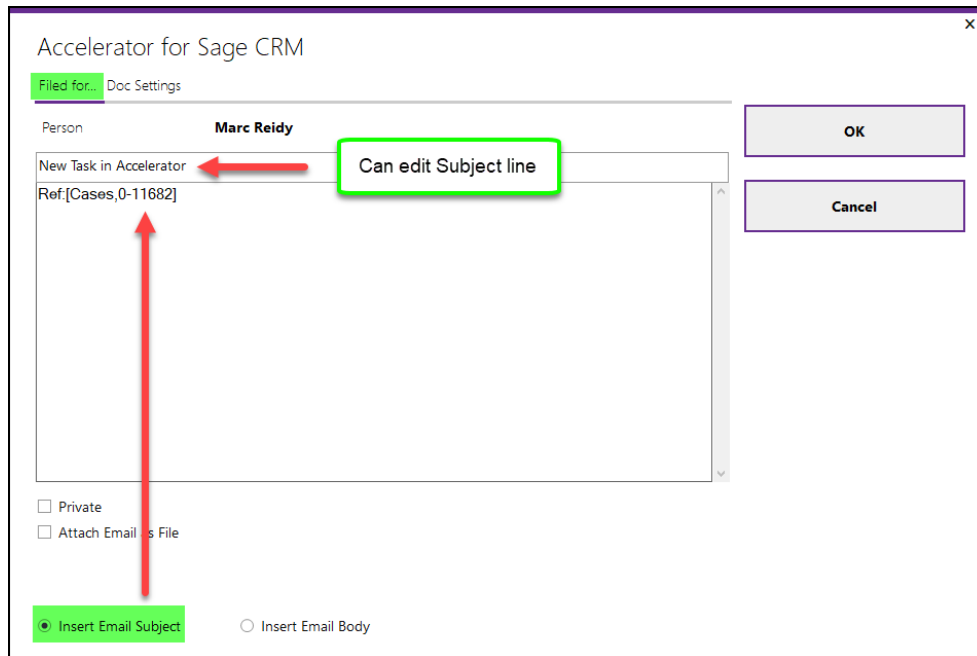
- Click email to select
- Confirm the context is correct
- Select Save Email button on Accelerator menu bar



If the Email Save Prompt default option is selected, the dialog box appears. There are 2 tabs in the dialog box: **Filed for** and **Doc Settings**.

a. Filed For

Filed For tells the system how you want the communication record to display in CRM (default parameters for the information shown here are maintained in Settings)



Accelerator for Sage CRM

Filed for... Doc Settings

Person **Marc Reidy**

New Task in Accelerator **Ref:[Cases,0-11682]** Can edit Subject line

Ref:[Cases,0-11682]

☐ Private

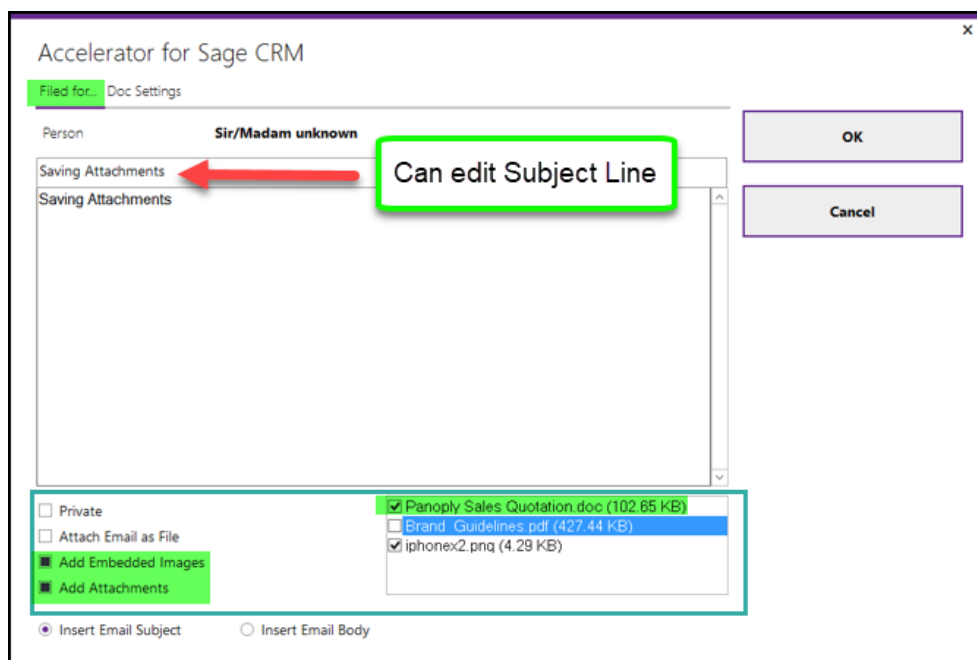
☐ Attach Email as File

☒ Insert Email Subject ☐ Insert Email Body

OK

Cancel

If the email has attachments, the screen will change as follows:



Accelerator for Sage CRM

Filed for... Doc Settings

Person **Sir/Madam unknown**

New Task in Accelerator **Saving Attachments** Can edit Subject Line

Saving Attachments

☐ Private

☐ Attach Email as File

☒ Add Embedded Images

☒ Add Attachments

☒ Insert Email Subject ☐ Insert Email Body

Attachments:

- ☒ Panoply Sales Quotation.doc (102.65 KB)
- ☐ Brand Guidelines.pdf (427.44 KB)
- ☒ iphonex2.png (4.29 KB)

OK

Cancel

Private - sets the record to be private (only the user who filed it can view in CRM)

Attach Email as File - click to save the entire email as a .msg document in CRM

Add Embedded Images - option to file embedded images to CRM

Add Attachments - a list of attachments from the email is displayed – select the document(s) to be stored in CRM

Insert Email Subject - default in Settings, but can be changed for each instance

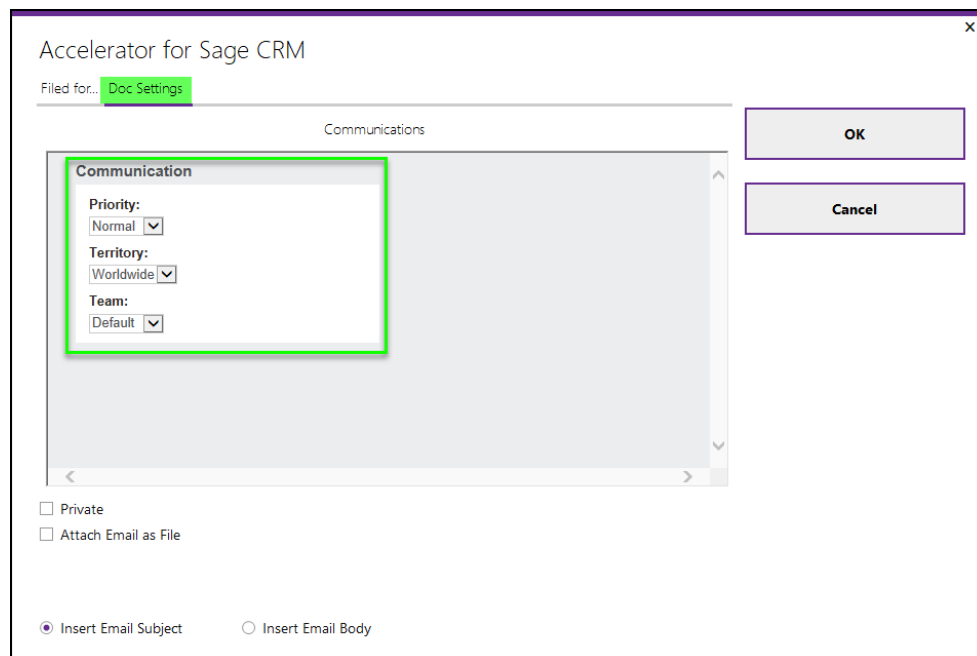
Insert Email Body - the full thread of the communication is displayed and will be saved

Clear down - if previous emails have been saved in the thread, clear down is used to clean the text below the chosen point. Access clear down by right clicking – any text below that point is then truncated to display on the communication note record:

<https://www.screencast.com/t/VRjoWdipi>

b. Doc Settings

Doc Settings allows you to specify the communication record attributes



Accelerator for Sage CRM

Filed for... **Doc Settings**

Communications

Communication

Priority:

Territory:

Team:

☐ Private

☐ Attach Email as File

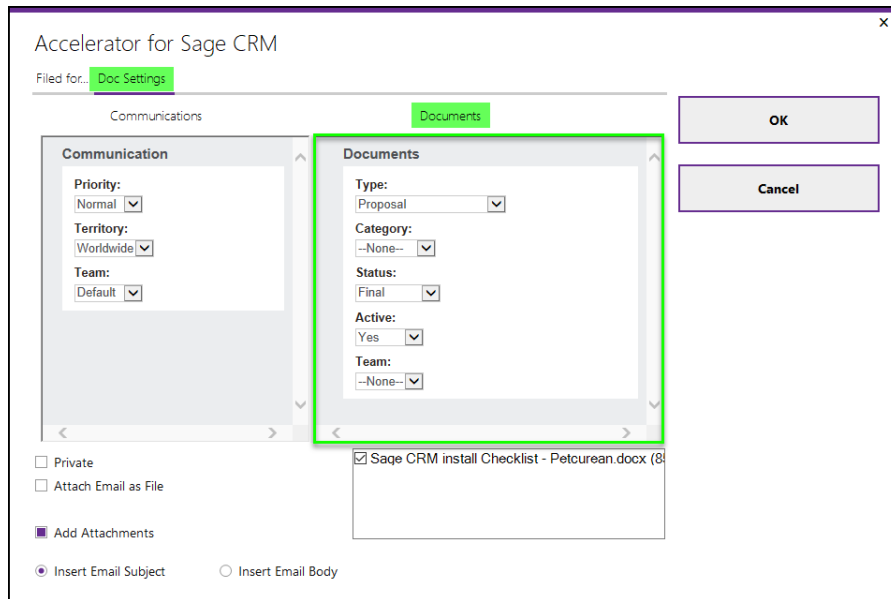
☒ Insert Email Subject ☐ Insert Email Body

OK

Cancel

Note: *File using Custom Fields* must be selected in Settings for this tab to be populated.

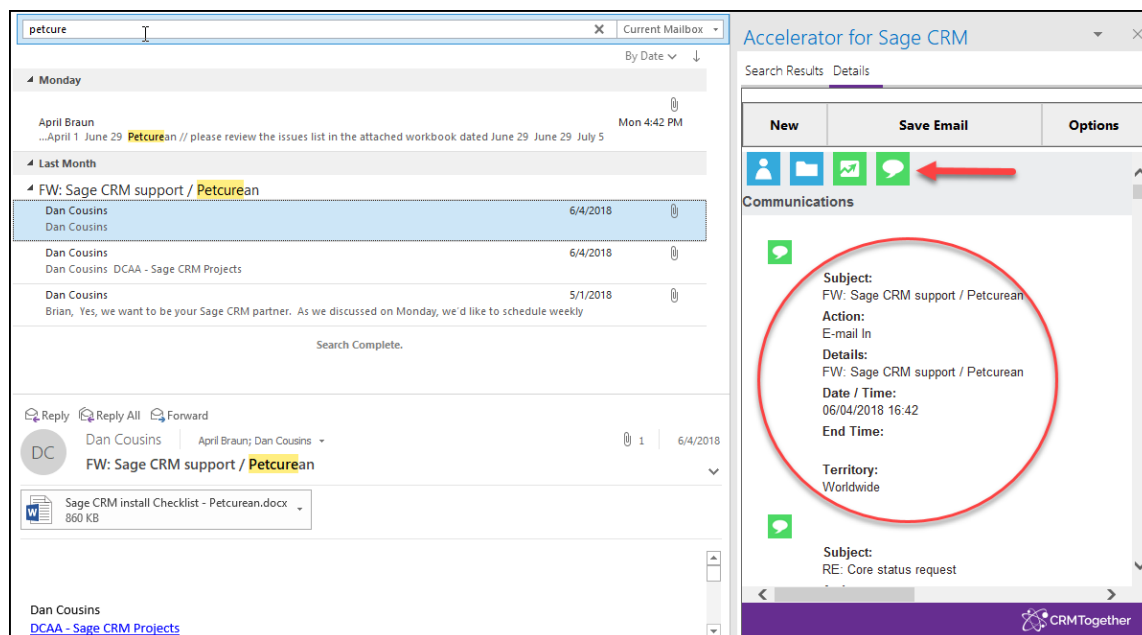
If the email has attachments, the screen will change as follows:



The fields displayed here can be customized to your CRM documents.

3. Finding & Displaying Stored Emails

The Accelerator quote bubble displays all communications associated with the email:



Note: clicking on the communications symbol to the left of the summary will open the record in Sage CRM.

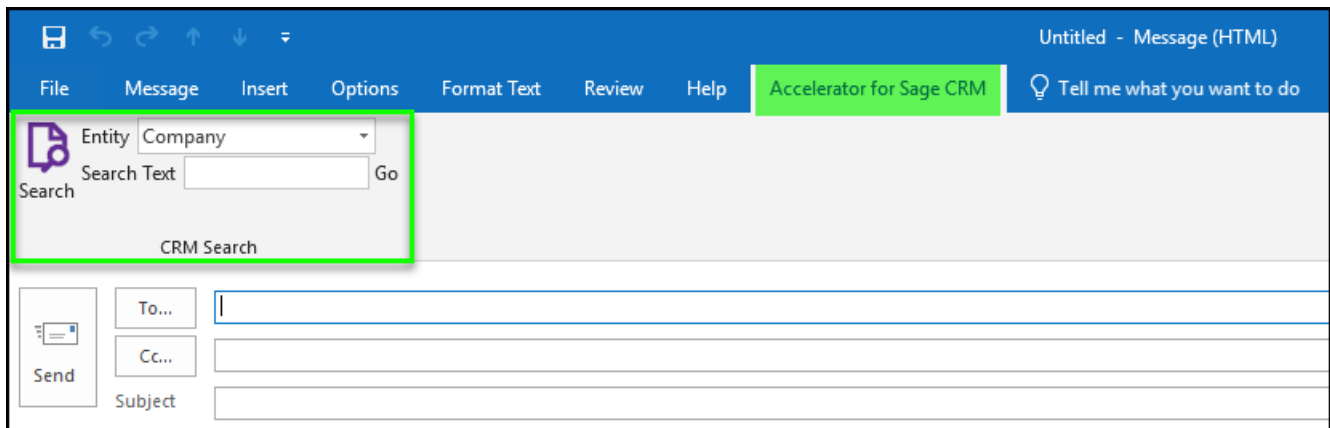
Outgoing Emails

1. Assigning Sent Emails in CRM

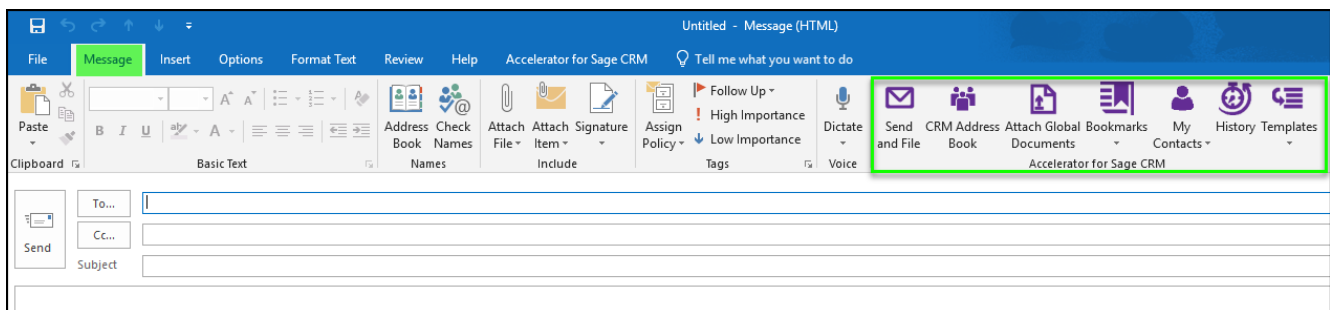
When there is more than one Person/Company associated with an email address, Accelerator will prompt you to choose the applicable record

2. New Email

a. CRM Search

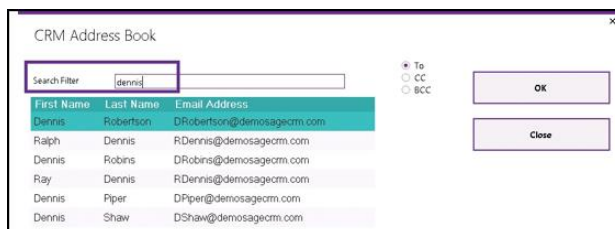


b. Accelerator Ribbon



Send and File – this button will complete the same function as the standard Outlook Send button, but it will also file the sent email to CRM

CRM Address Book – use your CRM data to find email addresses by filter

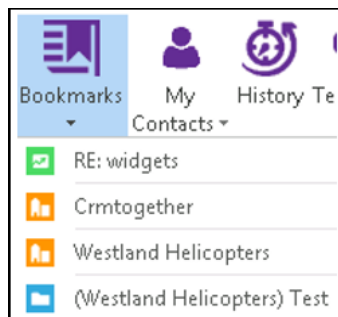


First Name	Last Name	Email Address
Dennis	Robertson	DRobertson@demomagecrm.com
Ralph	Dennis	RDennis@demomagecrm.com
Dennis	Robins	DRobins@demomagecrm.com
Ray	Dennis	RDennis@demomagecrm.com
Dennis	Piper	DPiper@demomagecrm.com
Dennis	Shaw	DShaw@demomagecrm.com

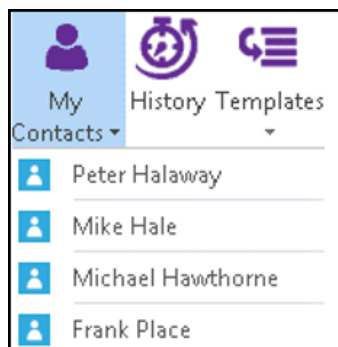
Attach Global Documents – where there are CRM documents associated with a specific entity, they can be accessed from here and attached to an outgoing email



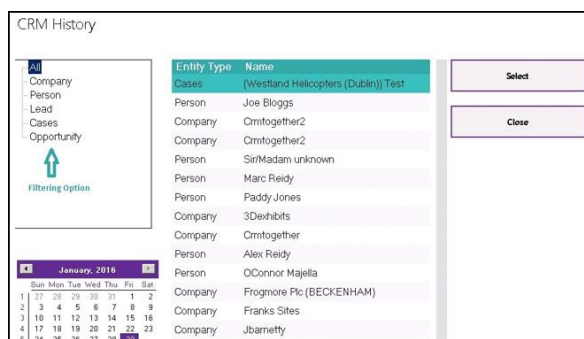
Bookmarks – a selection of entities that have been favorited that can be used to dictate the context of an email and display the Accelerator pane within a new email



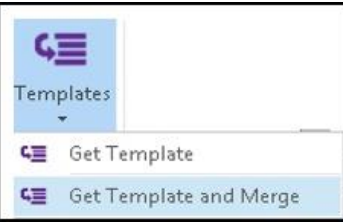
My Contacts – accesses the same information that the **My CRM – Contacts** area contains



History – calendar based record of your recent list in CRM for easy navigation




Templates – access the template you need to run your business and streamline communications



Select Template

Name
Standard Email
Email Reminder
Active Directory Welcome Email Template
Send Email Quote
Send Email Order
Lead email
Sale Email

Subject: Accelerator / integration between Sage CRM and MS Outlook

Attached:  Accelerator for Sage CRM v4.5.6 English.pptx 3 MB

Accelerator: While Sage CRM comes bundled with an Outlook Plugin which allows you to file emails from Outlook into CRM, a more robust Outlook integration is available from a third party developer. This utility is published by [CRM Together](#), a Sage CRM development partner that we have worked extensively with in the past. The cost for this add-on is \$160/user/year.


- Here is a 2-minute video overview of this solution: <https://www.youtube.com/watch?v=NM9dGzVDfmk&t=3s>
- The help files for Accelerator can be found from this link: https://accelerator.crmtogether.com/index.php?title=Main_Page
- A user guide has been attached to this email.


Dan Cousins
DCAA - Sage CRM Projects
416.233.3188


Accelerator Information Menu


1. Context-Specific Information


New
Save Email
Options


[Company](#)


[Cases](#)


[Opportunities](#)


[Communications](#)


[People](#)

Company Summary

Company Name:
[DCAA - My CRM Manager](#)

Website:
<http://www.dcaa.ca>

Source:

Status:
Active

Type:
Supplier

Number:
233.3188

Fax Number:

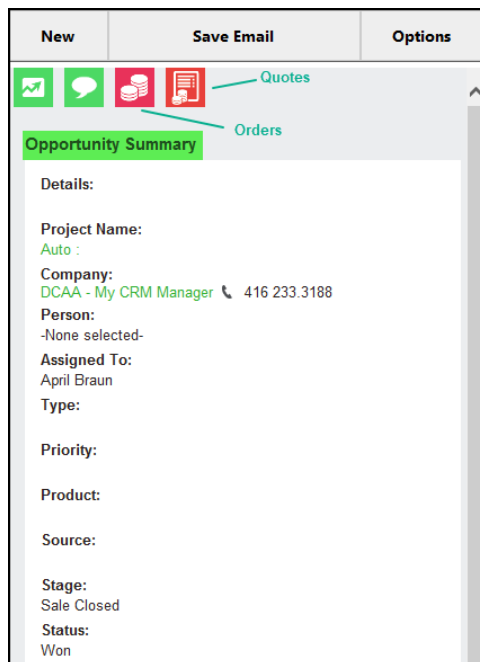
Business E-mail:
dan.cousins@dcaa.ca

Green lettering denotes a hyperlink

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

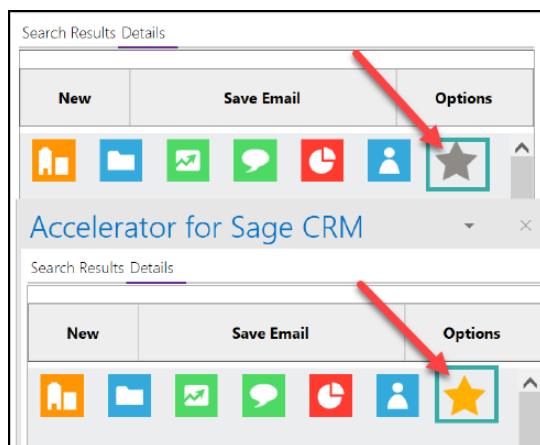
For example, by selecting the Person icon, a list of persons associated with this company appears. Click on the person icon for a contact and that person's profile summary displays.

By clicking on an opportunity in the list of opportunities, the Sales Opportunity Summary with all applicable details is displayed:



The information offered is extended to include possible quotes and orders. By clicking on the corresponding icon, the overview list opens and the details are displayed.

2. Bookmarks



With this option turned on, you can add/remove bookmarks. Click on the star icon to add/remove from your list. If there is no star icon, this feature is not enabled.



Contact Us

As you install Accelerator and begin utilizing the integration, questions may arise. Please contact us via inquiries@mycrmmanager.com and we will promptly respond. Be sure to include a screen shot of the question/issue so we can get a jump on the resolution.

You can also contact the publisher directly at <https://crmtogether.com/products/accelerator/>.