



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.

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Install Accelerator

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

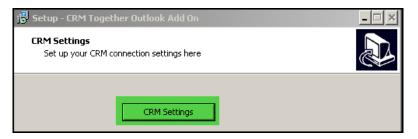
- 1. Close Outlook.
- 2. Log on to Sage CRM and click on the Accelerator tab.
- 3. Select **Outlook** to download and install the integration.

sage CRM	Му	CRM - Team CRM	▼ Reports ▼	Marketin	g 🕶		Search	~	!]	☆	Θ	പ്പ
Dashboard Calendar Map Conta	cts Opportunities Cases	Shared Documents	Preferences	Groups	MailChimp Campaigns	Accelerator						
My CRM for: April Braun Bookmarks	•							? Help				
								Click here t install the M Mail Merg	1ail Merge A		 After down run th instal 	loading ne
							-	Click here t install the A Outlook Int Outlook	ccelerator M	and 4S	 After downlo close a instand MS Ou Run th and th open C 	ll tes of tlook. e install

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

etup				
? c	lick Ves to in	stall for ALL Use	rs and not just tl	he current user
	lick res to in.	Stan for ALL ODE	is and not just a	
	ick res to m.		is and not just i	

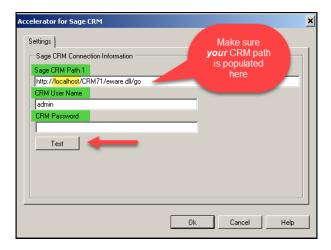
6. Select CRM Settings







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



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

Sage CRM Connection Info	mation	
Sage CRM Path 1		
1		
CRM User Name		
admin		
CRM Password	×	
Test	Logon Succeeded	
	OK	

Click Ok.

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

File Ho	me Send / Receive Folder	View Add-ins Help 🖓	Tell me what you want to do								
New New Email Items *	Clean Up Delete Archive	Reply Reply Forward In More +	Image: Section of the section of	∧ v v v	Nove Rules OneNote	Assign Unread/ Categorize Follow Policy * Read * Up *	New Group P Browse Groups	Search People Address Book	A)) Read Aloud	Store	✓ Accelerator
New	Delete	Respond	Quick Steps	G	Move	Tags	Groups	Find	Speech /	Add-ins	Accelerator for Sage CRM





Accelerator Settings

Click Settings in the Home tab



1. Settings

✤ Accelerator for Sag	e CRM Toolbar Options	×
Settings Documents Integrated	Access Address Management About	
Sage CRM Connection Informatio	n	
Sage CRM Path 1 - EG: http://www	w.server.com/crm/eware.dll/go	Active:
https://crm.dcaa.ca//crm/eware	.dll/US	
Sage CRM Path 2		
Sage CRM Path 3	Confirm that Sage CRM Pat http://yourCRMServerName/crm/e	
Sage CRM Path 4		0
Sage CRM Path 5		Ŭ
		0
EG: http://www.server.com/cr	m/eware.dll/go	0
	OK Cance	el Help

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

Accelerator for S	age CRM Toolbar Options	×									
Settings Documents Integra	ted Access Address Management About										
Document management infor	Document management information										
Set document working folder:											
	Br	rowse									
Version Information											
Version Number	4.7.1.1										
Build Date	2018-07-02 09:22:33										
Resolution Scale	1										
Browser b	Tagged C	Clear Data Cache									
⊖ IE	 Email Subject 										
 Default Browser 	Email Body										

- 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.)





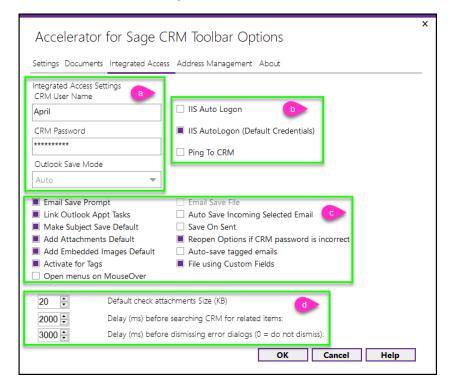
d. Clear Data Cache

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

> -> 🛧 📙 > Thi	s PC > OS (C:) > Users > albra > AppDa	ta → Local		
📌 Quick access	Name	Date modified	Type rile tolder File folder	Size
Desktop Downloads Documents Pictures Blasch	Packages PackageStaging Palo Alto Networks PeerDistRepub PlaceholderTileLogoFolder	In Quick Acce %appdata% - from Ap Delete all [
How To MailChimp User Guide	Programs Publishers speech	2/5/2018 12:16 PM 2/2/2018 2:22 PM 2/20/2018 8:38 AM 3/21/2018 11:24 AM	File folder File folder File folder File folder	
OneDrive This PC 3D Objects	Temp VirtualStore WebEx	6/28/2018 11:02 AM 6/4/2018 11:02 AM 3/22/2018 3:01 PM	File folder File folder File folder	
Desktop	Accelerator for Sage CRM v4.5.6 English Accelerator for Sage CRM v4.5.6 English CRMTogether_OUTLOOK_BC		Microsoft PowerP Microsoft PowerP DAT File	3,329 KB 3,329 KB 1 KB
Downloads Music	 CRMTogether_OUTLOOK_DDC CRMTogether_OUTLOOK_Trans 	6/28/2018 10:36 AM 6/28/2018 10:36 AM	DAT File DAT File	1 KB 32 KB

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.

	×					
Accelerator for Sage CRM Toolbar Options	~	<u> </u> \$	CRM STATUS		SUBJECT idy ACMS Accelerator CRM disco	anad
			Hi Dan,			nnect
Settings Documents Integrated Access Address Management		₽	0 [ar 🧾	Quick Print	
Address Management Setting			What is the IP add	R	Reply	
reenes management setting		Þ	Filed 🛛 🕅 🕻 Thanks Baz, See b	ar elc 🗣	Reply <u>A</u> ll	26
	Add				For <u>w</u> ard	-
	_	-•	Hi April,		Mar <u>k</u> as Read	
mmdmotors@gmail.com			Instructional video	ar 🔁	Mark as U <u>n</u> read	ts
					Categorize	- + E
			Below is an image	of 🕨	Follow <u>U</u> p	۲ ۲
		▶ !		ar 🔠	Assign <u>P</u> olicy	•
			Dan Cousins		Eind Related	×
			- · ·	oar 🧲	Quick Steps	► <u>"</u>
		O Bank	Reply All	1-1	Rule <u>s</u>	
		L-2 Keply				
		MR	Marc Reidy <r RE: ACMS Acc</r 	d		15
	Remove		RE. ACIVIS ACC	F	Mo <u>v</u> e to Other	
	Keniove				Always Move to Other	
		Hi Dan, Tor tu	, irning off the cachi	R	<u>lg</u> nore	
		nytu	inning on the cachi			•
					Delete	
ок	Cancel Help	4.7.1.0	issue If when usin			18
		In the d	custompages/sage		Accelerator - Ignore Email Addr web.com/	ess

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**

File	Home	Se	nd / Receive	Folder	View Add-in	s Help	💡 Tell me what you w	vant to do					
4	¢	_	☑ Show as C	onversations		F	Date (Conversations)	Erom	ۻ <u>T</u> o	Cat <u>eg</u> ories	 ↓ Reverse Sort → i Add Columns 		Bight Bottom
	View Settings		🔁 Conversat	ion Settings •	Show Focused Inbo	Message Preview *	Flag: Start Date	Flag: Due Date	I 🖬 Size	🖻 Subject	∓ +- Expand/Collapse ∗	Reading Pane *	Tc Dff
	urrent View		Mess	ages	Focused Inbo				Arrangement			Layout	Options People Parie

Sample Outlook Layout:

		Search Current Mailbox		🔎 Current Mailbox 🔹	Accelerato	or for Sage CRM	• ×
Focused Other				By Date ∽ 🛛 ↓		5	
! ② D CRM STATUS @ FROM	SUBJECT	RECEIVED	SIZE	CAT MENT 🕅	Search Results	Details	
	Blitz CRM / changing calendar formats ng users change their date/time formats: https://www.screencast.com/t/dgV		44 KE	[₿] ⊳	New	Save Email	Options
Below is an image of the issue	[GridWay #94052] New Ticket: Sanecotec crm team Vivek (copied) is experiencing when trying to connect to the Fortinet VPN to			e there			options
Dan Cousi Dan Cousins	Issue with CRM	Tue 7/3/2018 8:56 AM	788 K	KB ⊵			î
Date: Monday					Person Sur	nmary	
 Date: Last Week Date: Two Weeks Ago 			List		First Name Dan	Accelerato Panel	ר
Date: Three Weeks Ago					Last Name		
Date: Last Month					Cousins		
Date: Older					Company: DCAA - My Title:	r CRM Manager 📞 416 233.3188	
Reply Reply All Reply All					Website:		
Dan Cousins Gitner,	Krystal; April Braun 👻			Tue 9:52 AM	Fax Numb	er:	
DC Blitz CRM / changing c	calendar formats	_		~	Phone Nur 233.3188	mber:	
ll °	ers change their date/time formats: <u>https://www.screencast.com</u>	/t/dgVgDOPg	eading Panel		Business E dan.cousin		
Dan Cousins DCAA - Sage CRM Projects 416.233.3188					Business 416 233.31	88	

2. CRM Status – Filed (Display in Outlook)

· 谷 凸 0	FROM	SUBJECT	CRM STATUS	RECEIVED 🔻	SIZE
	Google	New sign-in from Chrome on Windows	Filed	Fri 11/6/2015 9:04	38 KB
	Microsoft	Updates to our terms of use and privacy statement		Thu 6/11/2015 12:	29 KB
U	alex@crmtogeth.	Re: attachments demo	Filed	Fri 5/29/2015 9:55	7 KB

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.

- a. Select the View tab
- b. Click on Add Columns:

F	ile Ho	me	Send / Receive	a	/iew Add-ins	Help	🔉 Tell me what you v	want to do				
Cha Vie	→ ¢ inge View w • Setting	Reset View	Conversati	onversations on Settings +	Show Focused Inbox	Message Preview *	Date (Conversations) Flag: Start Date) 🔁 From Flag: Due Date	⊊a <u>I</u> o I⊟ <u>S</u> ize	Cat <u>e</u> gories	↑↓ Reverse Sort ▶ Imit Add Columns ▼ *- Expand/Collapse *	Folder Reading To-Do Pane + Pane + Bar +
	Current Vi	ew	Mess	ages	Focused Inbox				Arrangement			Layout





- 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.

Show Columns ×	Show Columns X
Maximum number of lines in compact mode: 2	Maximum number of lines in compact mode: 2 🔍 d
Select available columns from: User-defined fields in Inbo	Select available columns from: User-defined fields in Inbé
Available columns: Show these columns in this order: CRM Status Add -> Importance	Available columns: Show these columns in this order: Add -> Importance A
Kulus Reminder licon Konner Flag Status Attachment Attachment New Column Subject Received Size Categories Mention	Reminder Icon CRM Status Flag Status Flag Status Rew Column New Column Reminder CRM Status Flag Status Subject Received Size Categories Mention
Properties Delete Move Up Move Down	Properties Delete Move Up Move Down
OK Cancel	OK Cancel

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

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

Accelerator fo	Accelerator for Sage CRM \bullet ×					
Search Results Detail						
Entities	ompany	Go	Options			
	Company					
	Person					
	Lead					
	Cases					
Opportunity						
Company Name	Company Name Last name					





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

Acceler	Accelerator for Sage C \bullet \times					
Search Results Details						
Entities	Company		Go	Optio	ons	
Company		Webs	site			
Design Ri		http://v				

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.

Accele	Accelerator for Sage C 🔹 🚿				
Search Results	Search Results Details				
New	Save Email	Options			
	Company				
	Person				
	Lead				
	Cases				
Opportunity					
<u>. </u>	h 🖿 🖾 🗩 👗 🔷 🔺				

b. Save Email

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

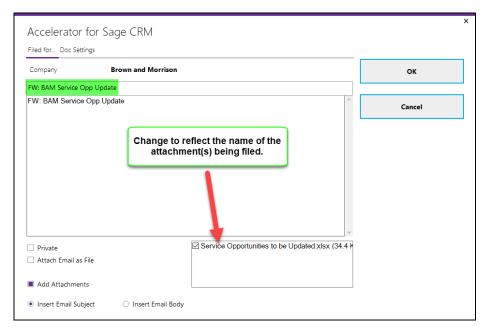




c. Options

Accelerat	Accelerator for Sage CRM 🔹 👻						
Search Results	Details		_				
New	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.



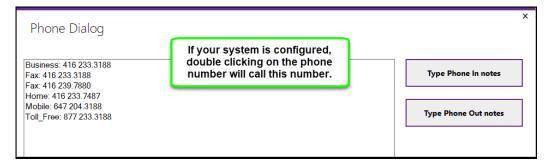




Sticky – freeze the Accelerator panel on a record. This is practical because you can then assign multiple email messages to that CRM context without the panel changing during the automatic CRM search after each selected email. Freezing is indicated by a blue frame around the context screen and must be manually released by re-selecting *Sticky*.

Accelerat	Accelerator for Sage CRM - ×						
Search Results	Search Results Details						
New	New Save Email Options						
	Z	^					

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.

Notes Dialog			×
Person	Dan Cousins		ок
Enter notes from t	he call here.	^	Cancel





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.)

Search Current Mailbox (Ctri+E) All Unread	Current Mailbox * By Date * Newest	Accelerator for Sage CRM
A Today Alex Reidy	11:25 AM	New Save Email
Alex Reidy	11:24 AM	
Alex Reidy	11:23 AM	Cases Summary
Alex Reidy <alex@crmtogether.com> alex@crmtogether.com> Re: Issue Ref:#Cases,27-10161#</alex@crmtogether.com>	11:23 AM ¥	Refld: 27-10161 Company: Credt Excalbur

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.

	То	Marc Reidy
Send	Сс	
	Subject	RE: Re: Sample email Ref:#IIXMKPK#

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.

۳ == Send	То	Marc Reidy
	Cc	alex@crmtogether.com;
	Subject	RE: Re: Sample emai Ref:#IIXMKPK#



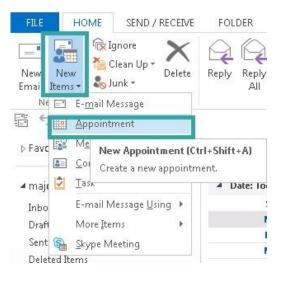


New Email – opens the Outlook dialog box for creating a new email. The Accelerator pane will already be open in the dialog box for the new email and display the reference context from the main screen. The reference ID (tag) is added to the subject line, which serves to create and open the associated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

	То	Marc Reidy
Send	Сс	
Jena	Subject	Ref:#IIXMKPK#

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:

<mark>ها</mark> ا		RE: [Grid	Way #94052] New Ticke	t: Sanecotec crm team	- Appointment		E – D	×
File	Appointment Insert Form	at Text Review H	elp 🛛 🖓 Tell me what	t you want to do				
Save & Dele Close Action		Neeting Me	Add Meeting Notes Meeting Meeting Notes	Invite Attendees Attendees	Tags Dictate	CRM Address Book ccelerator for Sage CRM	Customer Manager My Templates	~
Accelerator	r for Sage CRM						~	\times
CRM								
For						Custom		
Compa			erson:			Action:		
DCAA - About:	- My CRM Manager 📞 416 233	.3188 E	an Cousins 💺 416 2	33.3188		To Do	~	
	selected-							
								_
-	ointment conflicts with another one							
Subject	RE: [GridWay #94052] New Ticket:	Sanecotec con team						
Location	Dan Cousins		1 -					*
Start time	Tue 7/3/2018							
Endtime	Tue 7/3/2018	12:30 PM	r					
T								

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

<u></u>				(Dan Co	ousins) RE: [GridWa	y #94052] New 1	ïcket: Sanecotec cr	rm team - Task		b – (⊐ ×
File	Task	Insert For	mat Text	Review Hel	lp 🛛 🖓 Tell me v	vhat you want to	do				
Save & I Close	Delete Forw	ard OneNote	Task Det	Complete	Assign Send Statu Task Report Janage Task	s Recurrence Recurrence	Categorize Follov v Up v	 Private I High Importance ↓ Low Importance Tags 	Zoom Zoom	CRM Address Book Accelerator for Sage CRM	^
Acceler	rator for Sag	CRM									- ×
CRM											
	-									_	
For									Custo	m	
	npany: AA - Mv CR	M Manager 🐧	416 233.	3188	Person: Dan Cousin	s 📞 416 233.	3188		Actio		
Abo	out:								To D	• 🗸	
-Noi	ne selected										
Subject	(Da	n Cousins) RE:	[GridWay #94	4052] New Ticket:	Sanecotec crm team						
Start dat	e No	ne		Status	Not Started	•					
Due date	No	ne		Priority	Normal 🔫	• % Complete	0%				
🗌 Remi	nder No	ne		None	-	Owner	April Braun				





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:

- a. Tag match check that there is a tag and if so, search CRM based on that.
- b. Email Person check for person with same full email address
- c. Email Company check for a company with matching email domain
- 2. Saving Emails
 - a. Click email to select
 - b. Confirm the context is correct
 - c. Select Save Email button on Accelerator menu bar

Search Current Mailbox	Current Mailbox	•	Accelerator for Sage CRM
Focused Other	By Date ∽ ↓		Search Results Details
Dan Cousins Instructional video about having users change their date/time formats: https://www.screencast.com/t/dgVgDOPg	Tue 9:52 AM	•	New Save Email Options
Dan Cousins Below is an image of the issue Vivek (copied) is experiencing when trying to connect to the Fortinet VPN today.	Tue 9:27 AM		
Þ Dan Cousins; Giltner, Krystal Dan Cousins	! Tue 8:56 AM		Person Summary
D Monday			First Name: Dan
D Last Week			Last Name:
D Two Weeks Ago			Cousins
D Three Weeks Ago			Company: DCAA - My CRM Manager & 416 233.3188
D Last Month			Title:
b Older		*	
Reply Reply All C Forward			Website:
Dan Cousins Giltner, Krystal; April Braun 👻	Tue 9:52	AM	Fax Number:
DC Blitz CRM / changing calendar formats		~	Phone Number: 233.3188
Instructional video about having users change their date/time formats: https://www.screencast.con	1/t/dgVgDOPg		Business E-mail: dan.cousins@dcaa.ca
Dan Cousins			Phone
DCAA - Sage CRM Projects 416.233.3188			Business 416 233 3188
			CRM Together

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			ок	
New Task in Accelerator	Can edit Subject line			
Ref:[Cases,0-11682]		^	Cancel	
1 T				
		~		
Private				
Attach Email s File				
Insert Email Subject Insert Email	Body			

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

Accelerator for	Sage CRM				
Filed for Doc Settings					
Person	Sir/Madam unknown			ок	
Saving Attachments 🧹		Can edit Subject Line			
Saving Attachments			^	Cancel	
					_
			~	_	
Private		Panoply Sales Quotation.doc (102.65 KE	3)	1	
Attach Email as File	_	■ Brand Guidelines.pdf (427.44 KB) ✓ iphonex2.png (4.29 KB)			
 Add Embedded Image Add Attachments 	25				
Add Attachments]	
Insert Email Subject	Insert Email Body				

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/VRjoWdipj

b. Doc Settings

Doc Settings allows you to specify the communication record attributes

Accelerator for Sage CRM	×
Filed for Doc Settings	
Communications	ок
Communication	
Priority: Normal V Territory:	Cancel
Worldwide V Team: Default V	
<pre></pre>	
Private Attach Email as File	
Insert Email Subject Insert Email Body	

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





iled for Doc Settings					
Communications		_	Documents	ок	
Communication	~		Documents	~	
Priority:			Type: Proposal	Cancel	
Territory:		L .	Category:		
Worldwide 🔽		L .	None 💌		
Team: Default		L .	Status:		
		L .	Final Active:		
		L .	Yes V		
		L .	Team:		
		L .	None 🗸		
	×			\sim	
<	>	<	>		
Private			Sage CRM install Checklist - Petcurean.doc:	x (8	
Attach Email as File					

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:

petcure T X	Current Ma	ilbox 🔹	Accelera	tor for Sage CRM	• >
·	By Date 🗸	\downarrow		3	
4 Monday			Search Result	ts Details	
April Braun April 1 June 29 Petcurean // please review the issues list in the attached workbook dated June 29 June 29 July 5	() Mon 4:42 PN	4	New	Save Email	Options
▲ Last Month					,
FW: Sage CRM support / Petcurean			Communica		
Dan Cousins 6/4/201 Dan Cousins	з ()		Communica	ations	
Dan Cousins DCAA - Sage CRM Projects 6/4/201	3 ()			Subject:	
Dan Cousins 5/1/201 Brian, Yes, we want to be your Sage CRM partner. As we discussed on Monday, we'd like to schedule weekly	3 ()			FW: Sage CRM support / Petcurean Action:	
Search Complete.			(E-mail In Details: FW: Sage CRM support / Petcurean Date / Time:	
C Reply Reply All C Forward				06/04/2018 16:42	
Dan Cousins April Braun; Dan Cousins +	0 1	6/4/2018		End Time:	/
DC FW: Sage CRM support / Petcurean		~		Territory: Worldwide	
Sage CRM install Checklist - Petcurean.docx - 860 KB				i ondinae	
		^		Subject: RE: Core status request	,
Dan Cousins DCAA - Sage CRM Projects		¥	<	ద	CRMTogether

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

H	५ २ ५	.↓						Untitled - Message (HTML)
File	Message	Insert	Options	Format Text	Review	Help	Accelerator for Sage CRM	${igodoldsymbol Q}$ Tell me what you want to do
	Entity Compan Gearch Text CRM So		Go					
ت= Send	Cc Subject							

b. Accelerator Ribbon

) ¢ ↑	↓ =			Untitled - Message (HTML)												
File	Message	Insert	Options	Format Text	Review	Help	Accel	erator fo	or Sage CR	M S	Tell me what you wa	ant to do					
Paste	BI	u alz -	A - ≡	⊑ -	Address	• @	File 🐐 I	tem -			Low Importance	Dictate *	Send and File	s Attach Global Documents	-	Contacts -	Cemplates
Clipboard	Gi .	Ba	isic Text	G.	Nan	nes		Include			Tags	Voice		Accelerat	or for Sage (RM	
ت= Send	To	 															

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

			· To	
Search Filter	dennis		O CC O BCC	OK
First Name	Last Name	Email Address		
Dennis	Robertson	DRobertson@demosagecrm.com	ſ	1.00
Ralph	Dennis	RDennis@demosagecrm.com		Close
Dennis	Robins	DRobins@demosagecrm.com		
Ray	Dennis	RDennis@demosagecrm.com		
Dennis	Piper	DPiper@demosagecrm.com		
Dennis	Shaw	DShaw@demosagecrm.com		





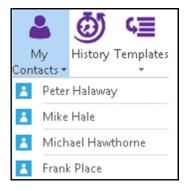
Attach Global Documents – where there are CRM documents associated with a specific entity, they can be accessed from here and attached to an outgoing email

Select Templa	te				
Search Filter	l				Select
File Name	Туре	Category	Description	St	
GN_1.5.doc	Contr.	Sales	Standard Contract	Final	
Supporting Docu	Email	Support	Support Document	Final	Cancel
process-summary	Report	Finance	Process summary	Final	

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

Bookmarks		My Contacts	History Te	
2	RE: widgets			
Au	Crmtogether			
A	Westland Helicopters			
	(Westland Helicopters) Test			

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

All Company	Entity Type Cases	Name (Westland Helicopters (Dublin)) Test	Select
Person	Person	Joe Bloggs	
-Lead -Cases	Company	Crmtogether2	Close
Opportunity	Company	Crmtogether2	
Û	Person	Sir/Madam unknown	
	Person	Marc Reidy	
Filtering Option	Person	Paddy Jones	
	Company	3Dexhibits	
	Company	Crmtogether	
	Person	Alex Reidy	
	Person	OConnor Majella	
Sun Mon Tue Wed Thu Fri S. 27 28 29 30 31 1	Company	Frogmore Plc (BECKENHAM)	
3 4 5 6 7 8	9 Company	Franks Sites	
17 18 19 20 21 22 2		Jbarnetty	
24 25 26 27 28 29	Orantest	0	



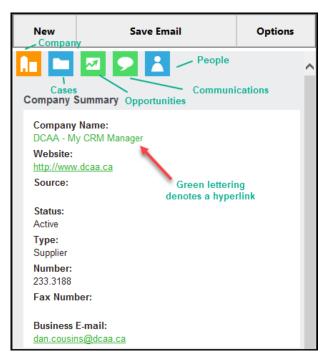


Templates – access the template you need to run your business and streamline communications

	Select Template
c=	Name Standard Email
	Email Reminder
Templates	Active Directory Welcome Email Template
	Send Email Quote
4 ≣ Get Template	Send Email Order
- occrempiace	Lead email
4 Get Template and Merge	Sale Email
Subject Accelerator / integration between Sage CRM and Mt Attached Accelerator for Sage CRM v4.5.6 English.pp	
Together, a Sage CRM development partner that we have worked Here is a 2-minute video overview of this solution: https://	igin 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 <u>CRM</u> extensively with in the past. The cost for this add-on is \$160/user/year. www.youtube.com/watch?v=NM9dGzVDfmk&t=3s tps://accelerator.crmtogether.com/index.php?title=Main_Pag
Dan Cousins	

Accelerator Information Menu

1. Context-Specific Information



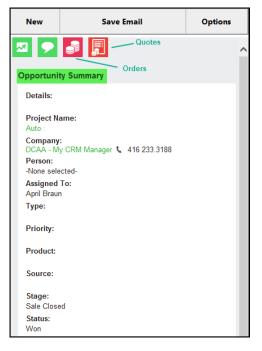
Note: Data fields in green lettering indicate a hyperlink to either an executable function (e.g., website, email, phone call) or the corresponding entry in Sage CRM.





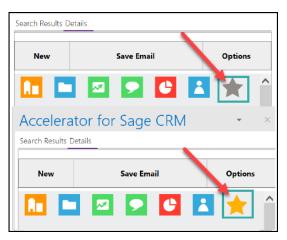
For example, by selecting the Person icon, a list of persons associated with this company appears. Click on the person icon for a contact and that person's profile summary displays.

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 <u>inquiries@mycrmmanager.com</u> 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 <u>https://crmtogether.com/products/accelerator/</u>.