



ACCELERATOR USER GUIDE

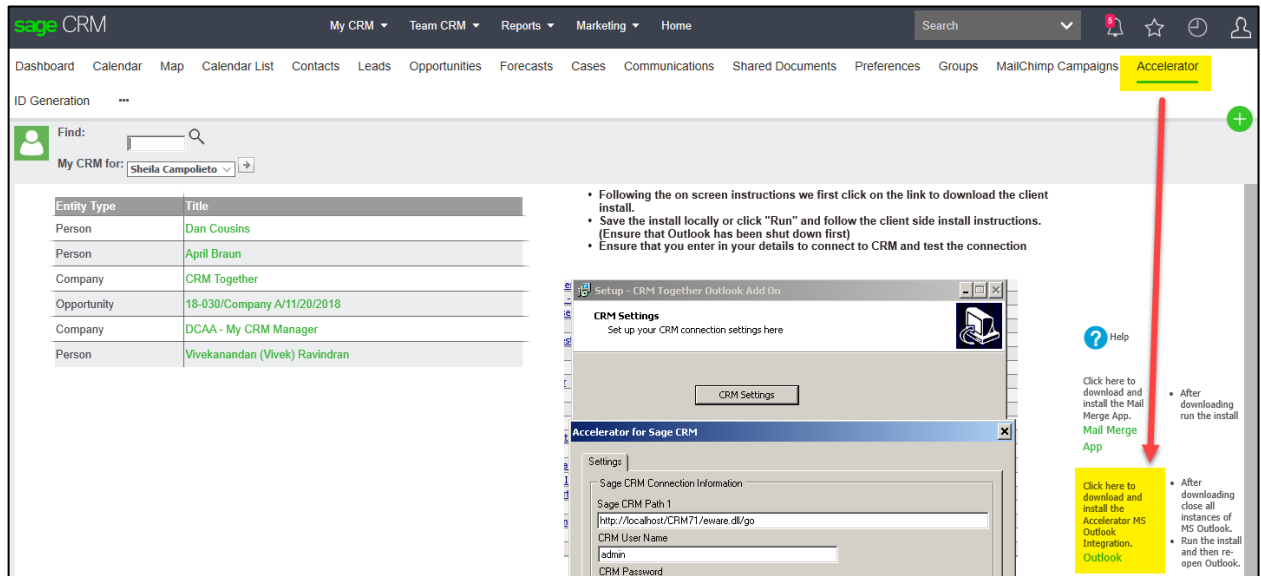
Accelerator is a third-party add-in providing an integration between Outlook and Sage CRM. You can update CRM data from Outlook: convert emails to companies, contacts, sales and cases. With Accelerator, you can file emails, attachments and log call information as well as tag outbound emails to customer 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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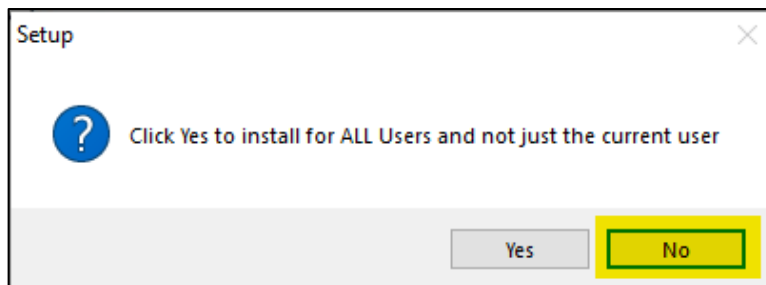
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Install Accelerator

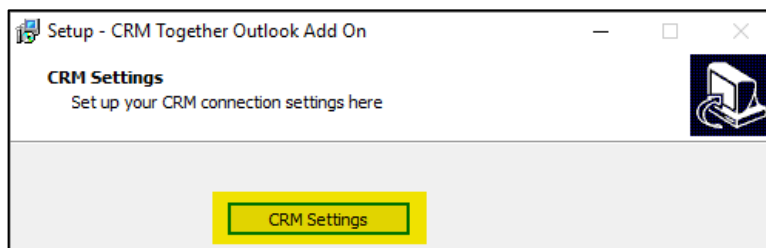
1. Close Outlook
2. Log into Sage CRM and click on the **Accelerator** tab (or My CRM > Accelerator)
3. Scroll down and select **Outlook** to download and install the integration



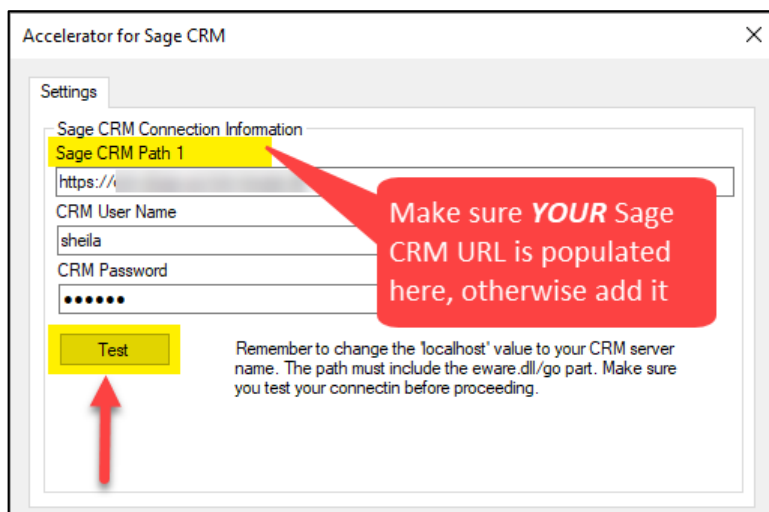
4. Click **Run** and follow the install instructions
5. When asked if you want to install for all users, click **No**



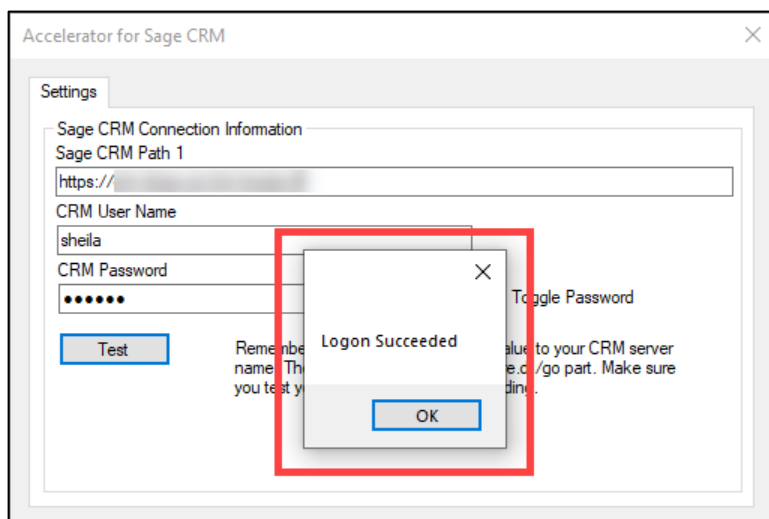
6. Select **CRM Settings**



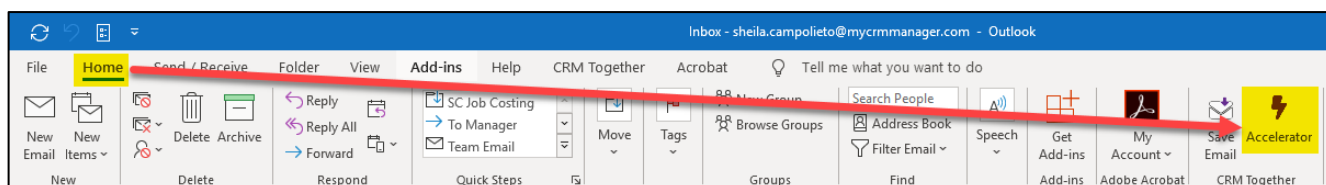
- Confirm your CRM path and user/password appear (if the Sage CRM Path 1 field doesn't default with your Sage CRM URL, you must update it before testing) then click **Test**



- If all settings are correct, you will receive a Logon Succeeded message, then click **OK**

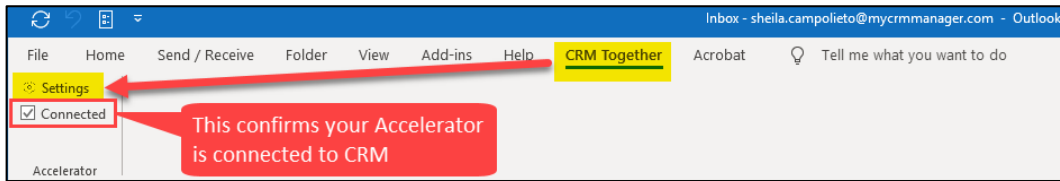


- Once the installation is finished, open Outlook and find the Accelerator icon in the top right corner of the Home tab (the checkbox confirms Accelerator has successfully connected to Sage CRM):

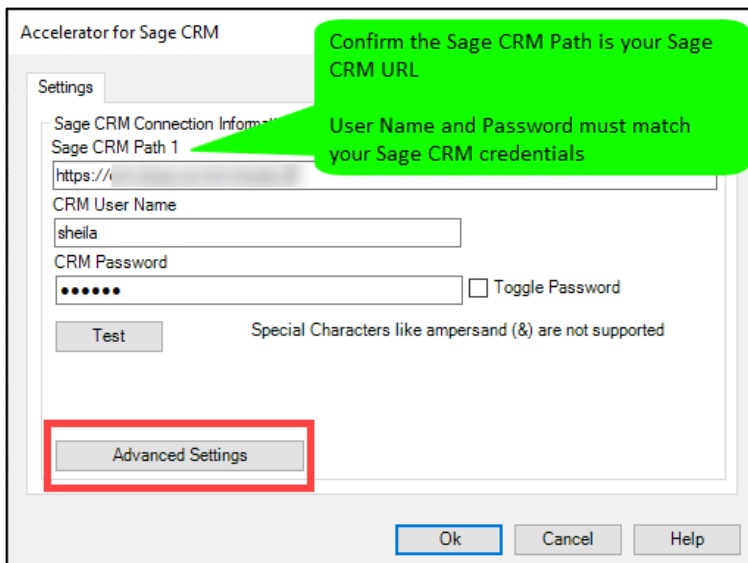


Accelerator Settings

1. CRM Together tab



2. Advanced Settings

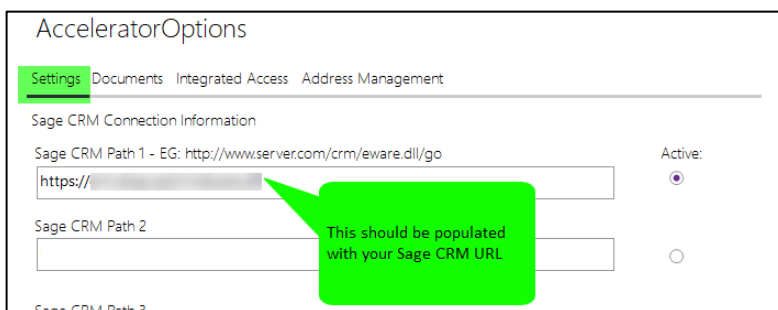


NOTE: If your corporate policies allow the use of Microsoft Outlook via the Internet and your Sage CRM instance is publicly accessible (i.e. accessible outside of your network), it is recommended to use the external URL (see below for examples of internal vs. external).

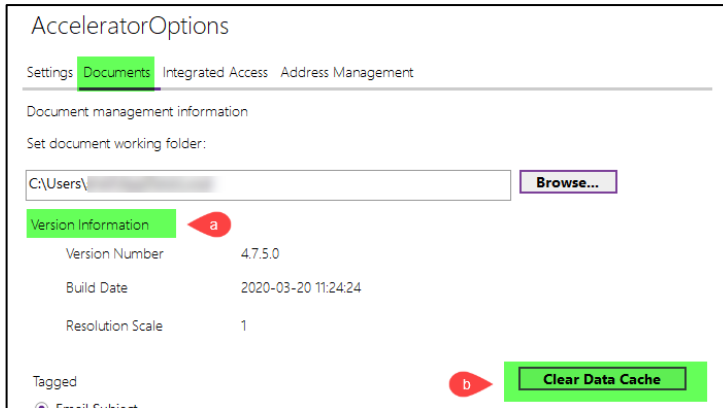
INTERNAL: <http://yourCRMServerName/crm/eware.dll/go>

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

3. Settings



4. Documents



AcceleratorOptions

Settings **Documents** Integrated Access Address Management

Document management information

Set document working folder:

C:\Users\ [redacted] **Browse...**

Version Information a

Version Number 4.7.5.0

Build Date 2020-03-20 11:24:24

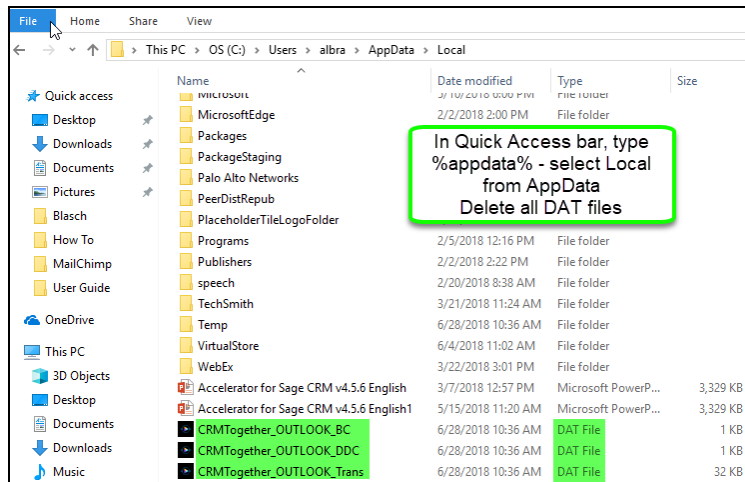
Resolution Scale 1

Tagged

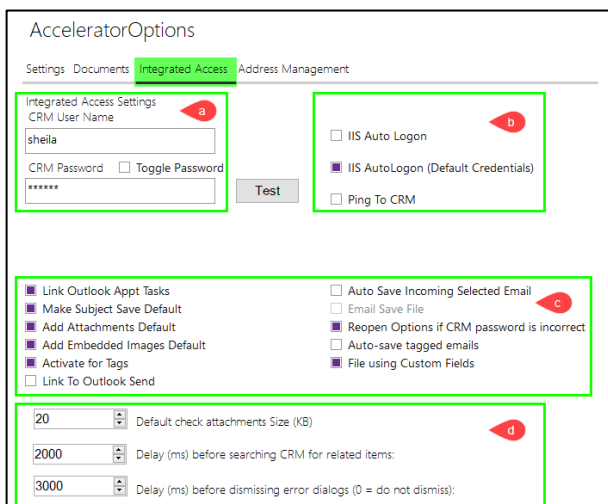
Clear Data Cache b

- a. Version Information
- b. Clear Data Cache

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



5. Integrated Access (recommended settings)



AcceleratorOptions

Settings Documents **Integrated Access** Address Management

Integrated Access Settings

CRM User Name a

CRM Password ☐ Toggle Password

Test

☐ IIS Auto Logon b

☒ IIS AutoLogon (Default Credentials)

☐ Ping To CRM

☒ Link Outlook Appt Tasks

☒ Make Subject Save Default

☒ Add Attachments Default

☒ Add Embedded Images Default

☒ Activate for Tags

☐ Link To Outlook Send

☐ Auto Save Incoming Selected Email c

☐ Email Save File

☒ Reopen Options if CRM password is incorrect

☐ Auto-save tagged emails

☒ File using Custom Fields

20 Default check attachments Size (KB) d

2000 Delay (ms) before searching CRM for related items:

3000 Delay (ms) before dismissing error dialogs (0 = do not dismiss):

a. Integrated Access Settings

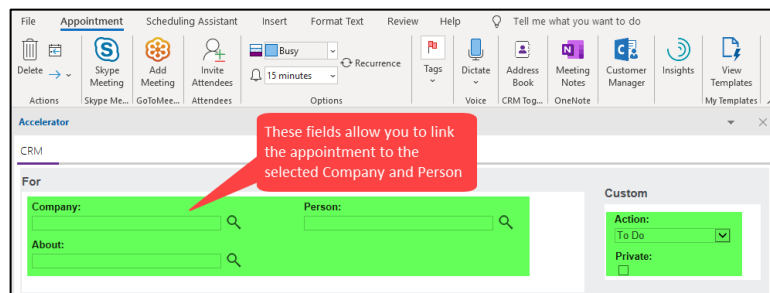
CRM User Name/Password = user's Sage CRM login credentials

b. Logon Credentials

Use **IIS AutoLogon (Default Credentials)**

c. Email Options

Link Outlook Appt Tasks – extends the MS Outlook appointment and task function by linking it to a CRM Company, Person and Action (this function must be previously activated and set up on the server by our technicians)



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

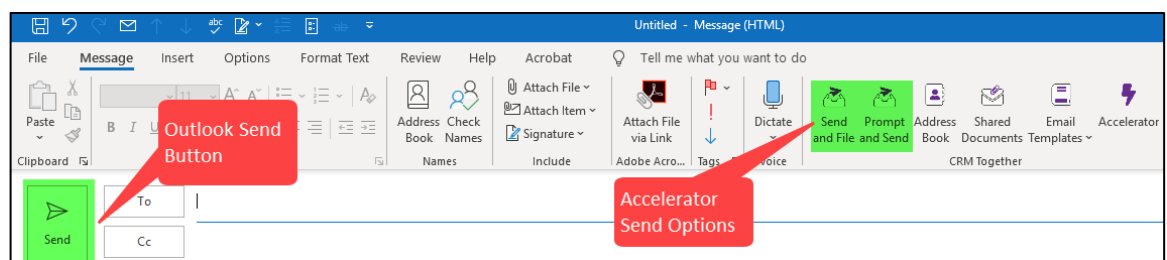
	Date / Time	Person	Subject	Details
Checked displays the subject under Details			Test Subject	Test Subject
Not checked displays the body under Details			Test Subject	This is the body of the email. Sheila CampolietoProject Managerwww.mycrmmanager.com <http://www.mycrmmanager.com/> (M) 585.429.0870

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 – saves embedded images within the email

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

Link To Out Send – links the *standard* Outlook Send button to Accelerator



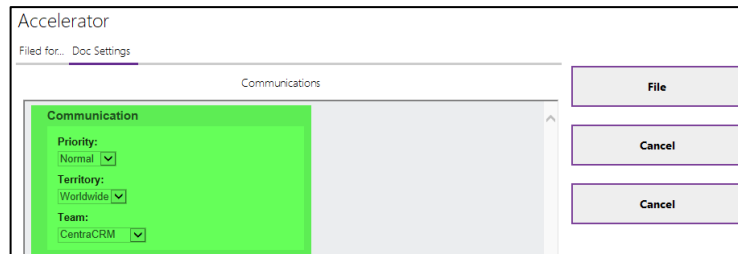
Auto Save Incoming Selected Email – automatically saves selected incoming emails from Outlook to CRM without using "Save Email" (if the email address exists in CRM)

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)

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

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

File using Custom Fields – enables editing of custom fields before filing email to CRM



d. Other Settings

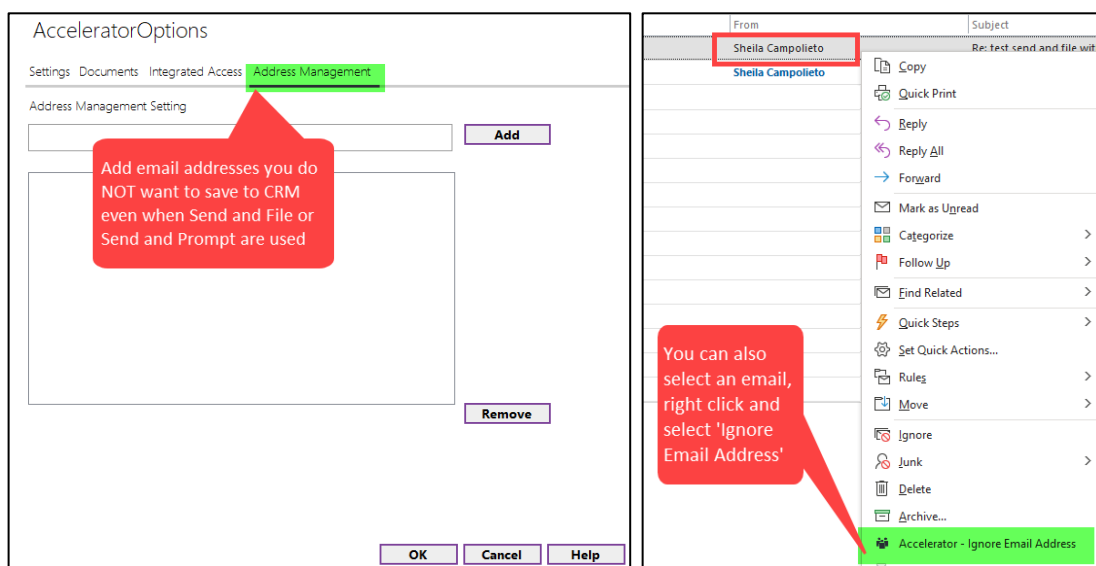
Default check attachments Size (KB) – indicates a minimum size of attachment that will be saved . . . some email signatures contain logo files you don't want to file

Delay (ms) before searching CRM for related items – delays 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)

6. Address Management

Specifies for which email recipients automatic CRM save and automatic storage dialog box should **not** be enabled
Address Management settings are tied to all three send options (Send and File, Prompt and Send, Outlook Send)

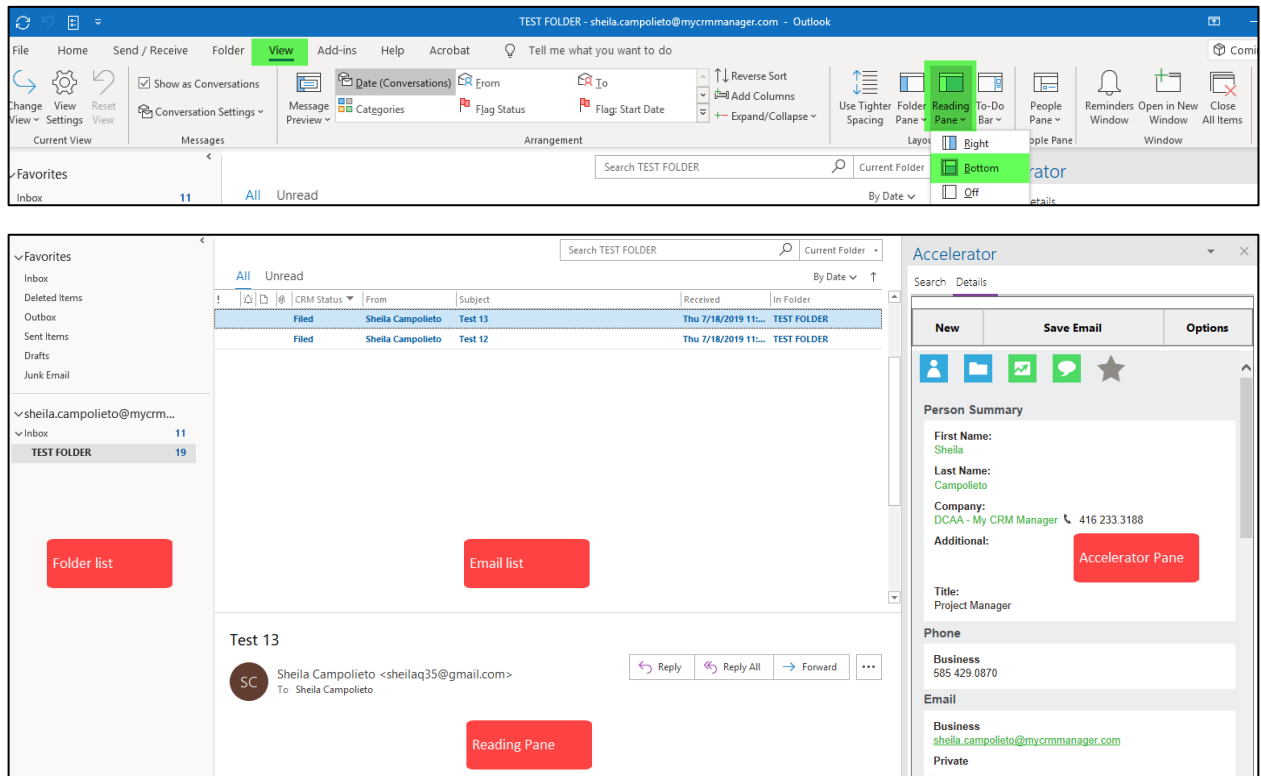


NOTE: The list of excluded recipients can easily be expanded to include additional recipients by right-clicking on an email. Use the function: **Ignore Email Address**.

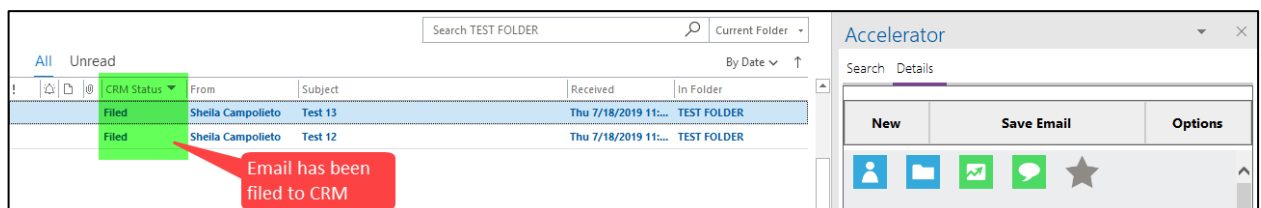
Viewing Accelerator on the Outlook Screen

1. Layout

To change the layout of the Outlook screen to accommodate the addition of the new Accelerator Pane (which opens on the right side), select the **View** tab and click on **Reading Pane** and choose **Bottom**



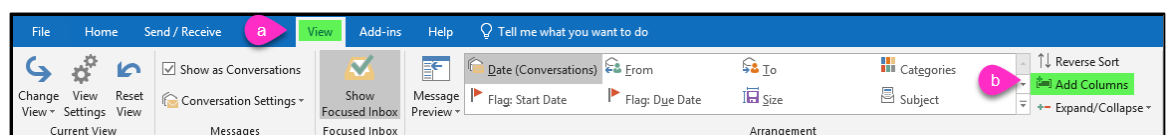
2. CRM Status for Inbox



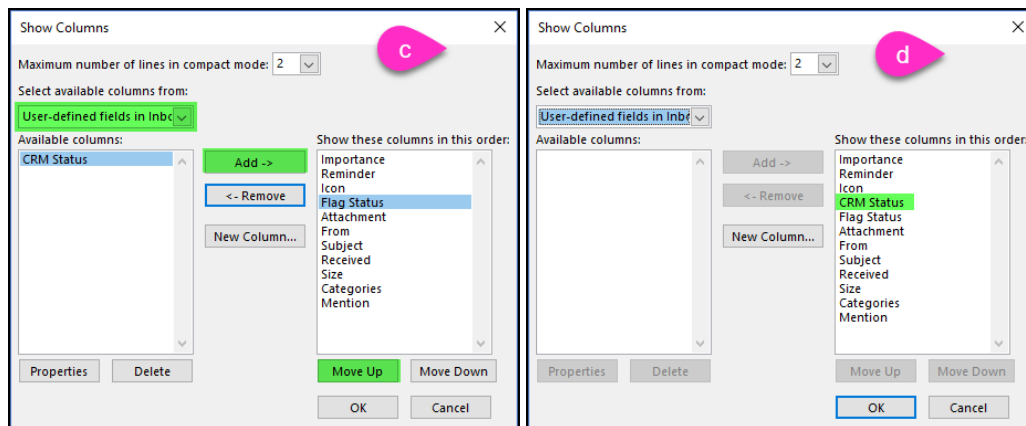
NOTE: This status field is only displayed after the first email has been saved/stored in CRM

To display the CRM Status column (if an email has already been filed using Accelerator):

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



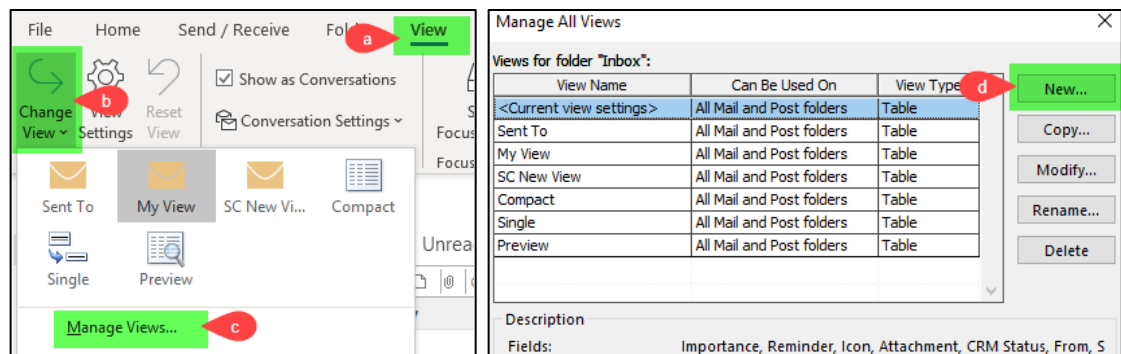
- c. Choose **User-defined fields in Inbox** from the available columns drop-down and select CRM Status
- d. Select **Add** and then move the **CRM Status** field toward the top of the list



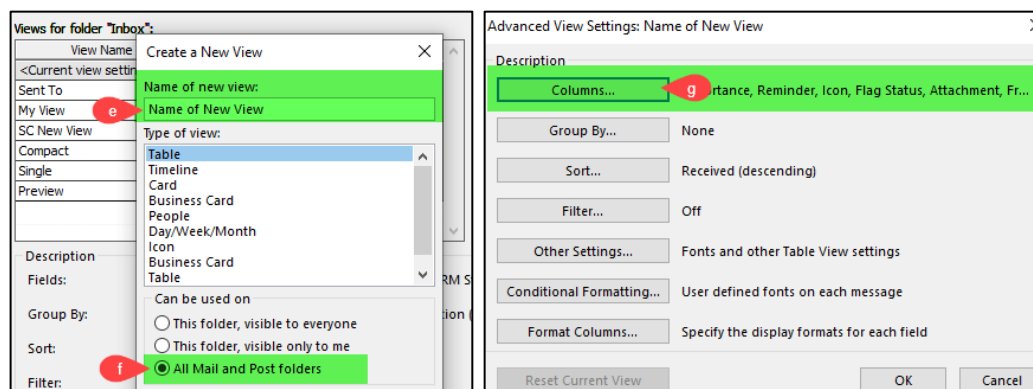
3. CRM Status for Subfolders

You can add CRM Status column to each subfolder individually or create a new view that adds the status field to all subfolders already created. To create a new view:

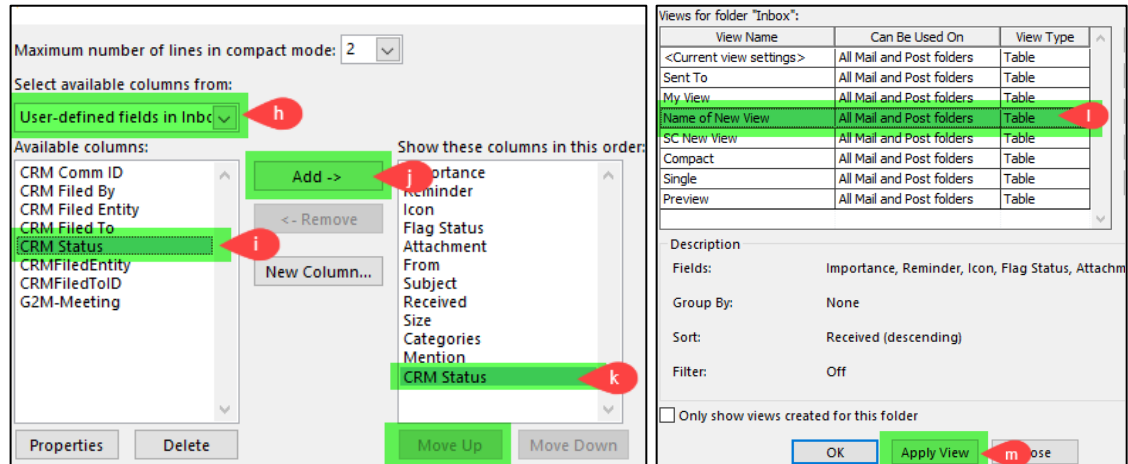
- a. Click View tab
- b. Change View
- c. Manage Views
- d. New



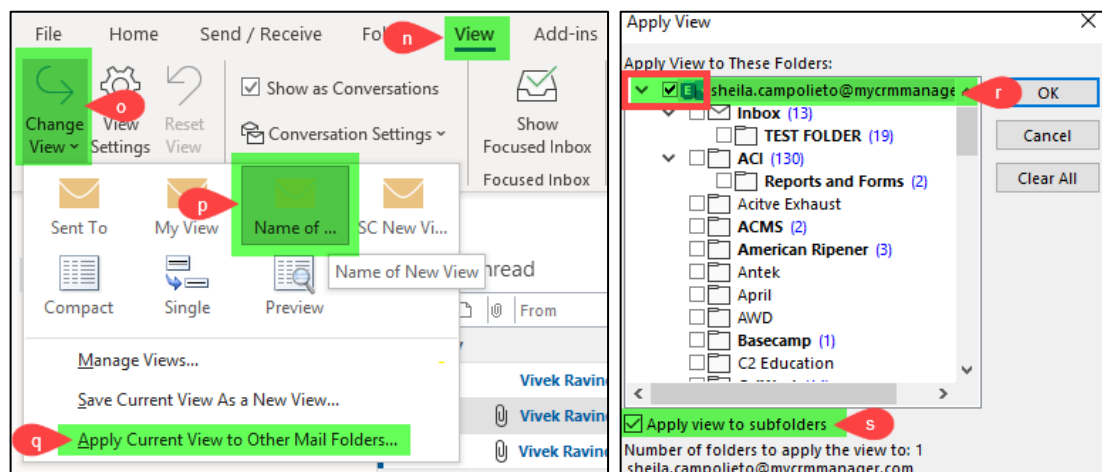
- e. Enter a name for new view
- f. Check the box for All Mail and Post folders > OK
- g. Columns



- h. Scroll down to User-defined fields in Inbox
- i. Select CRM Status
- j. Add
- k. Select CRM Status and click Move Up to place the CRM Status column where you choose > OK
- l. Select the new view just created
- m. Apply View (this applies the view to the highlighted folder, continue to next steps to apply view to all)



- n. View tab
- o. Change View
- p. Select new view
- q. Apply Current View to Other Mail Folders
- r. Check the box for the main folder
- s. Check the box for Apply view to subfolders > OK (all folders should now have CRM Status column visible)



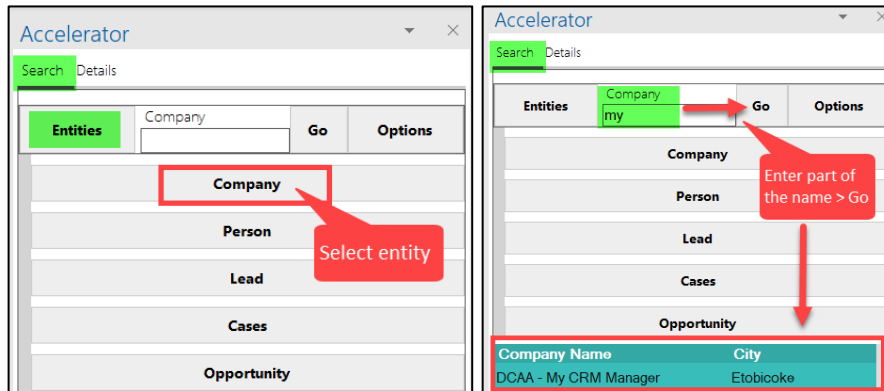
If you later create a new folder, you can apply your new view to by selecting the new folder and completing steps n, o, and p from above.

Accelerator Menu Buttons

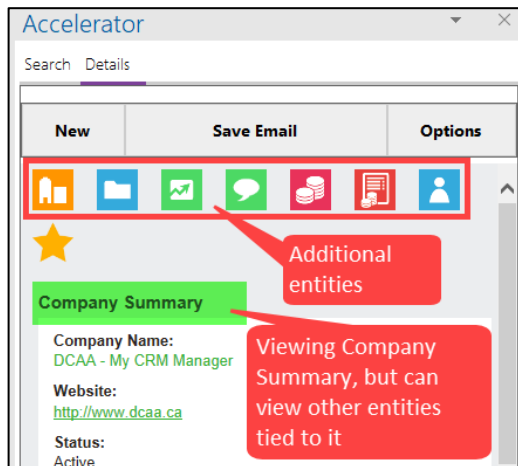
By default, when you select an email, Accelerator will attempt to find a Person match in CRM using the email address in the 'From' field. If there is no match, Accelerator will start to create a Company record by parsing the email. You can continue to create the new Company and Person record, or search for a record.

1. Search Entities

Allows you to search for an entity and save an email against any existing record

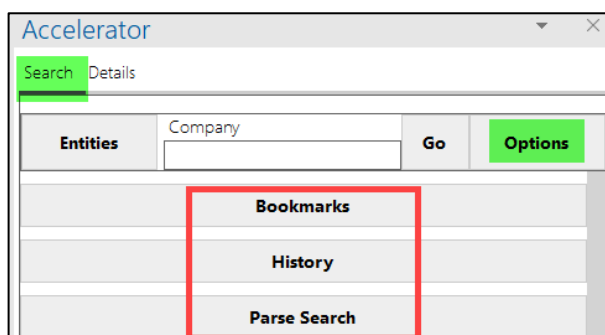


To view the record from the Accelerator Pane double click on the line item, this will open the **Details** tab and show you the entity page as well as access additional entities tied to that record



2. Search Options

Allows you to search by bookmarks, history, or email address



- a. Bookmarks – lists all the records that have been bookmarked

Accelerator	
Search Details	
Entities	Company
Go	Options
Dan Cousins	person
April Braun	person
CRM Together	company
18-030/Company A/11/20/2018	opportunity
Vivekanandan (Vivek) Ravindran	person

- b. History – allows you to search for and select a record based on entity and date

CRM History

1

Select All or a specific entity

2

Select a specific date (or click month then year or use arrows to quickly get to a different date)

3

Highlight the appropriate record, then click Select

Select

Close

- c. Parse Search – searches all email addresses associated with the selected email

Select an email address

sheila.campolito@mycrmmanager.com

vivek@mycrmmanager.com

dan.cousins@mycrmmanager.com

april.braun@mycrmmanager.com

OK

3. Details

Allows you to create a new record, save an email, or choose from a list of options

- a. New – allows you to create a new entity based on the data in the email (a best practice is to first go to the appropriate Company record and then create a new Person, Opportunity, or Case from there)
- b. Save Email – allows you to save the email as a Communication 'Email In' against the current record (see [Saving Emails](#) under [Incoming Emails](#) for more details)

Accelerator

Search Details

New Save Email Options

Company

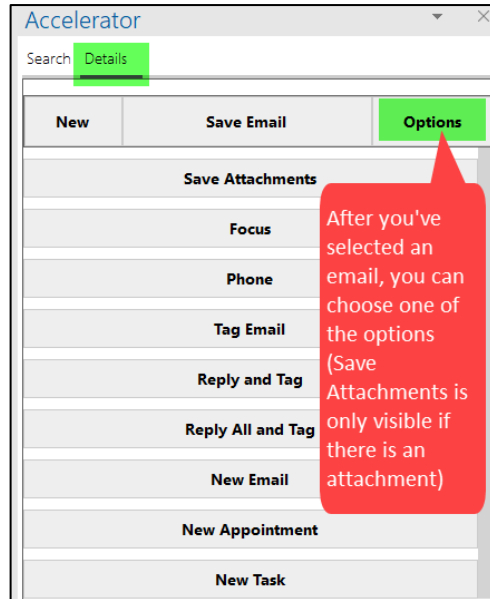
Person

Lead

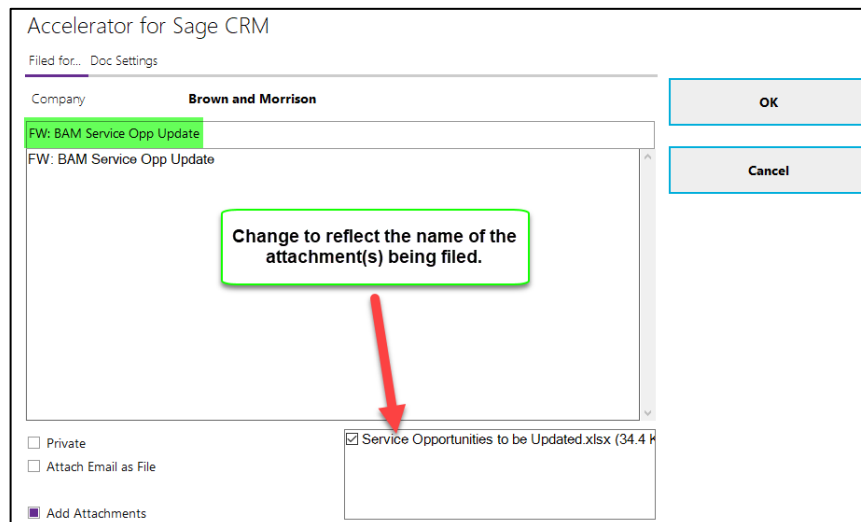
Cases

Opportunity

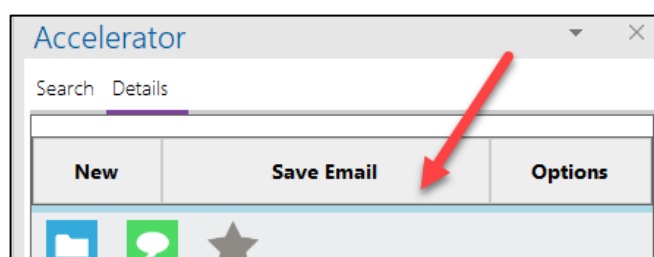
- c. Options – applies the selected option to the highlighted email



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)



Focus – freezes the Accelerator Pane on a specific record. This is practical because you can then assign multiple email messages to that CRM record without the pane 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 **Focus**



Phone – displays the phone information and allows you to enter incoming/outgoing calls, then added to CRM as a communication record (calls can be made if the "callto:" function is supported by your CTI system, such as Skype)

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

Phone Dialog

Business: 416 233.3188
 Fax: 416 233.3188
 Fax: 416 239.7880
 Home: 416 233.7487
 Mobile: 647 204.3188
 Toll_Free: 877 233.3188

If your system is configured, double clicking on the phone number will call this number.

Type Phone In notes

Type Phone Out notes

Notes Dialog

Filed for: Doc Settings

Person Dan Cousins

OK

Enter notes from the call here.

Cancel

Tag Email – after you select the correct entity, select Tag Email from Options to add a reference number to the subject line which serves to create and open the associated reference in case of incoming emails from the reference; this can be a Case ID or a randomly assigned number in the absence of a Case (i.e.: You receive an email that needs to reference an existing CRM Case > search for the Company, select the Case icon, find the Case, click on the small Case icon, click Tag Email; the Case ID will be referenced.)

Yellow line indicates the email was tagged

Tagging email from the Case assigns the Case Id as the reference in the Subject line


Person Mapping Ref.#Cases,40-11779#

Refid: 40-11779

Company:

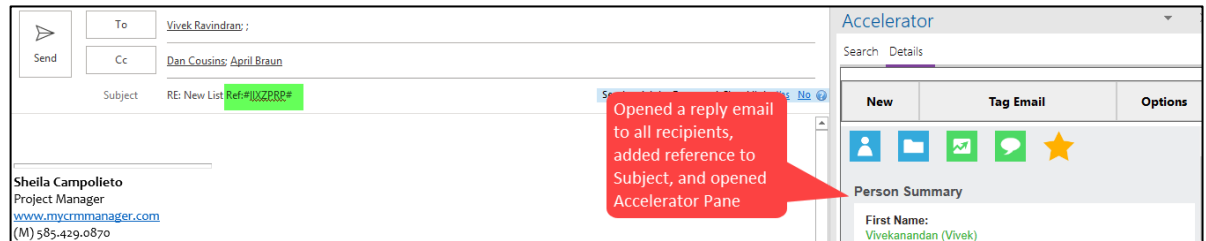
The screenshot shows an Outlook email client. The email subject is "CRM design (v2) Ref.#IIXMKDDR#". A red callout box highlights the reference code "#IIXMKDDR#" and contains the text: "Tagging email from the Person record assigns a random reference in the Subject line". The email body shows the start of a message from "To: Sheila Campolieto: Dan Cousins".

Reply and Tag – after you select the correct entity, select Reply and Tag from Options to create a new reply email to original sender, open the Accelerator Pane within the email, and add a reference ID (tag) to the subject line; this serves to create and open the associated record (Company, Person, or Case) in case of incoming emails from the reference and for other users within the organization.



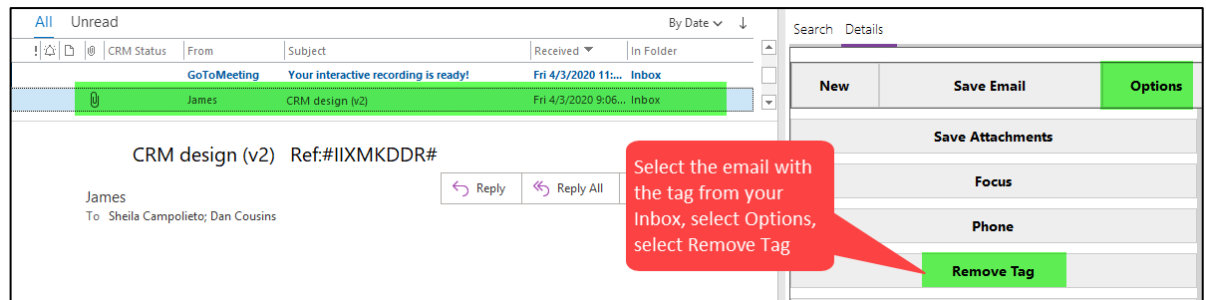
The screenshot shows an Outlook email window. The email is from Marc Beidy to Sheila Campolieto. The subject is "RE: Graphs" with a reference "#IXZDKP#" highlighted in green. A red callout bubble points to the subject line, stating: "Opened a reply email, added reference to Subject, and opened Accelerator Pane". The Accelerator Pane is open on the right, showing icons for New, Tag Email, and Options, along with a Person Summary section.

Reply All and Tag – after you select the correct entity, select Reply All and Tag from Options to create a new reply email to all recipients, open the Accelerator Pane within the email, and add a reference ID (tag) to the subject line; this serves to create and open the associated record (Company, Person, or Case) in case of incoming emails from the reference and for other users within the organization.



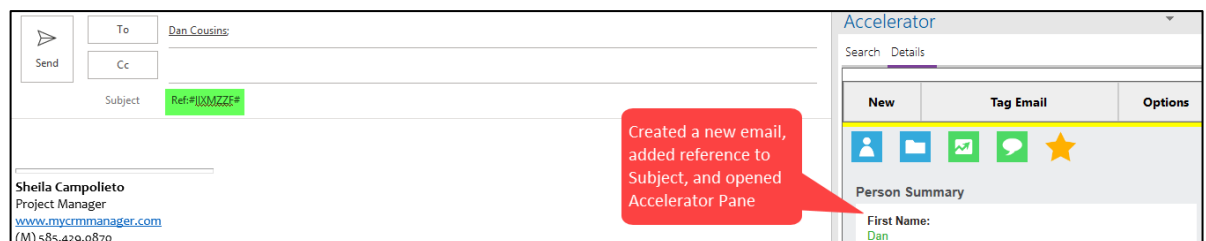
Opened a reply email to all recipients, added reference to Subject, and opened Accelerator Pane

Remove Tag – allows to you remove a tag from an email



Select the email with the tag from your Inbox, select Options, select Remove Tag

New Email – after you select the correct entity, select New Email from Options, this creates a new email to Person selected, opens the Accelerator Pane within the email, and adds a reference ID (tag) to the subject line; this serves to create and open the associated Person record in case of incoming emails from the reference and for other users within the organization.



Created a new email, added reference to Subject, and opened Accelerator Pane

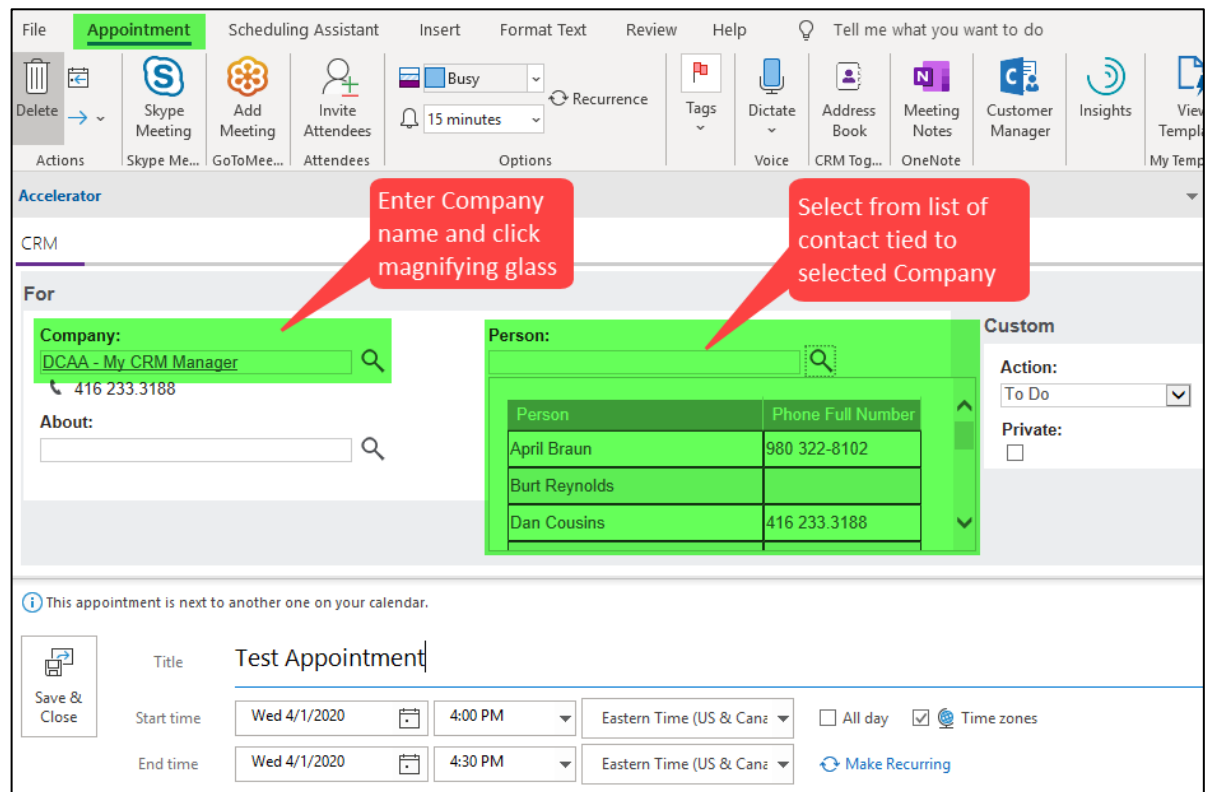
New Appointment – allows you to create a calendar Appointment linked to the selected entity

New Task – allows you to create a Task linked to the selected entity

The Outlook entry screen is extended with Sage CRM fields that are preset with entity data from the context screen for Appointments and Tasks.

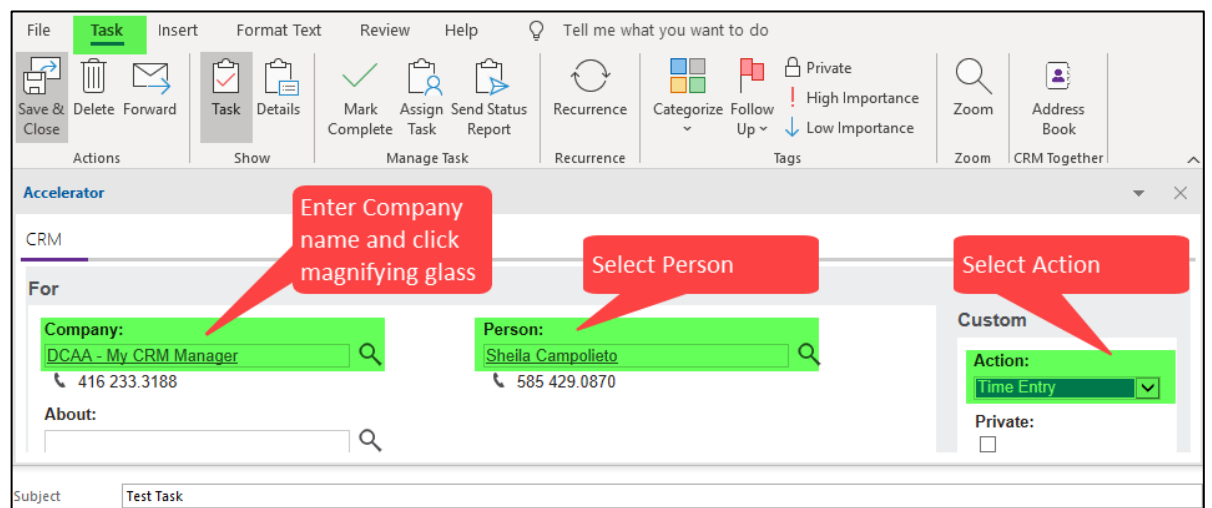
This function must be previously set up and activated for Accelerator on the Sage CRM server as well as in the user settings. The parameters for appointment/task synchronization must be set correctly in the Sage CRM server settings!

Fill in CRM fields, search for entity the appointment/task is relevant to > Save & Close or Save & Send



Appointment Form Fields:

- Company:** DCAA - My CRM Manager (with magnifying glass icon)
- Person:** (with magnifying glass icon)
- Title:** Test Appointment
- Start time:** Wed 4/1/2020, 4:00 PM, Eastern Time (US & Canz)
- End time:** Wed 4/1/2020, 4:30 PM, Eastern Time (US & Canz)
- Custom:** Action: To Do, Private: ☐



Task Form Fields:

- Company:** DCAA - My CRM Manager (with magnifying glass icon)
- Person:** Sheila Campolieto (with magnifying glass icon)
- Action:** Time Entry (with dropdown arrow)
- Subject:** Test Task

Incoming Emails

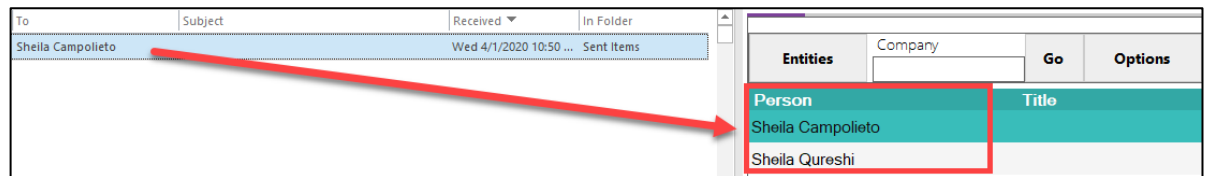
1. Email Matching

When an email is received, Accelerator will search based on the email address in the From field 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
- Person Email – check for Person with same full email address
- Company Email – check for a Company with matching email domain

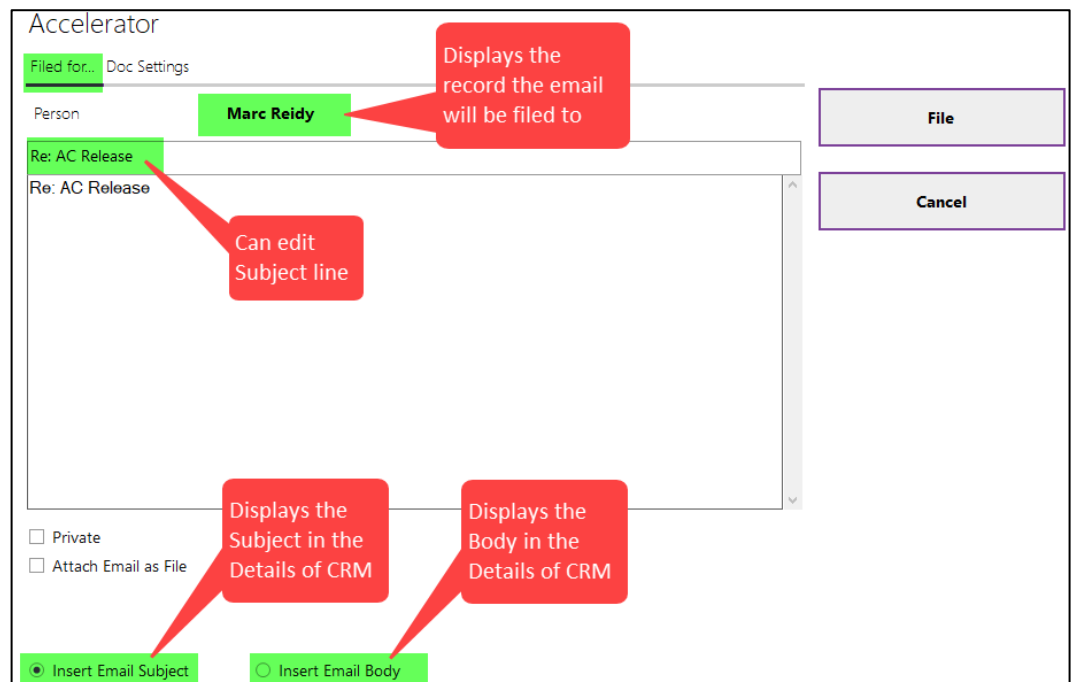
2. Saving Emails

- From your Inbox, click on the email you want to file (do not open it)
- Confirm the entity in the Accelerator Pane is correct
- When there is more than one Person/Company associated with an email address, Accelerator will prompt you to choose the applicable record
- Select Save Email button (if you save to a Company, it also saves to the default contact Person, if you save to a Person, it also saves to the Company, if you save to an Opportunity or Case, it also saves to the Company)

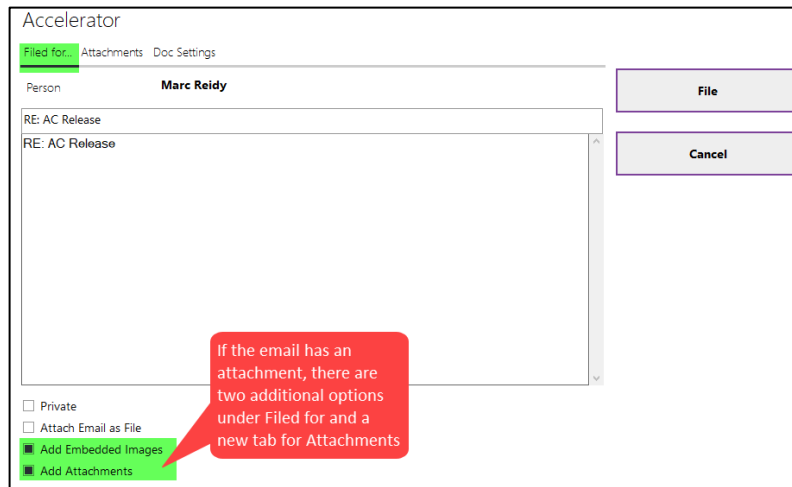


i. Filed For

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)



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



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

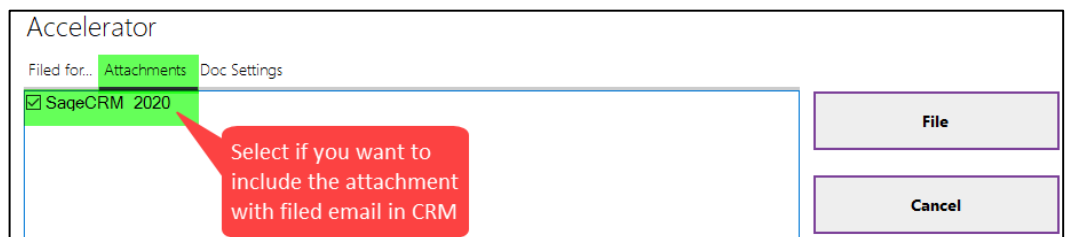
Attach Email as File – click to save the entire email as a .msg document in CRM

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

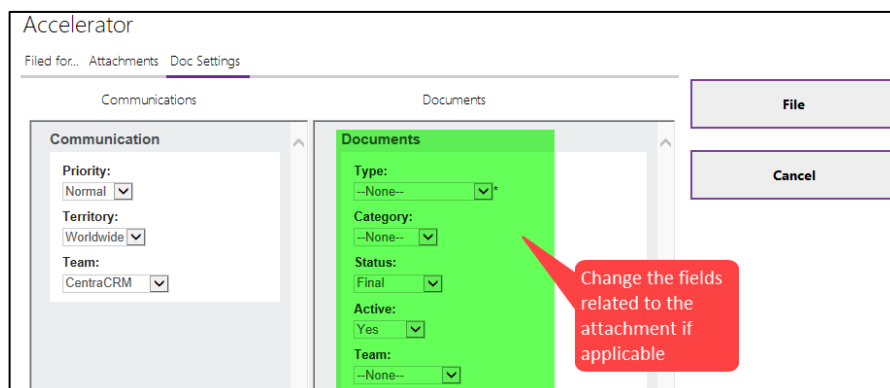
Insert Email Subject – displays the Subject under Details in CRM (this is the default setting)

Insert Email Body – displays the body of the email under Details and will be saved



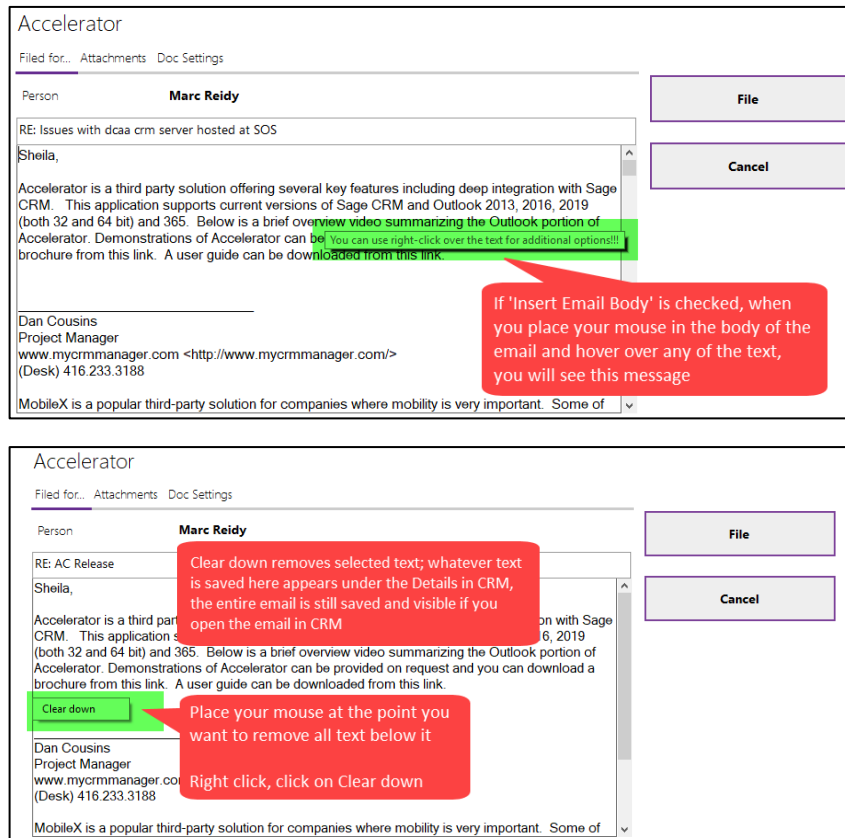
- ii. **Doc Settings** – allows you to specify the Communication record attributes (the fields displayed here can be customized to your CRM documents)

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



Clear down – if previous emails have been saved in the thread, Clear down is used to truncate the text below the chosen point. Access Clear down by placing your mouse at the beginning of the text you want to truncate and right click – any text below that point is then truncated and not displayed under Details in CRM:

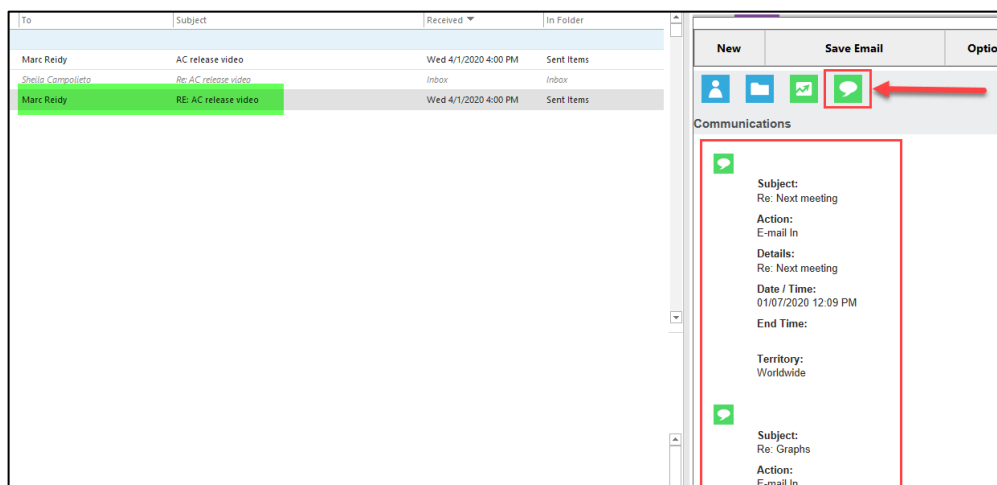
<https://www.screencast.com/t/VRjoWdipi>



3. Finding & Displaying Stored Emails

The Accelerator quote icon displays the list of Communications associated with the selected email address

NOTE: Clicking on the Communications symbol to the left of the summary opens the Sage CRM record.

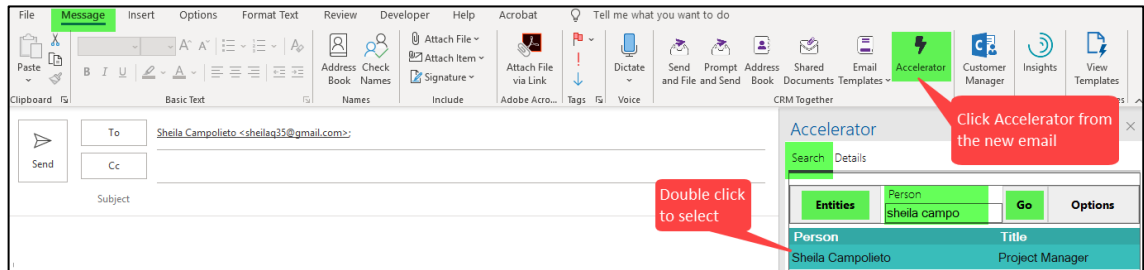


Outgoing Emails

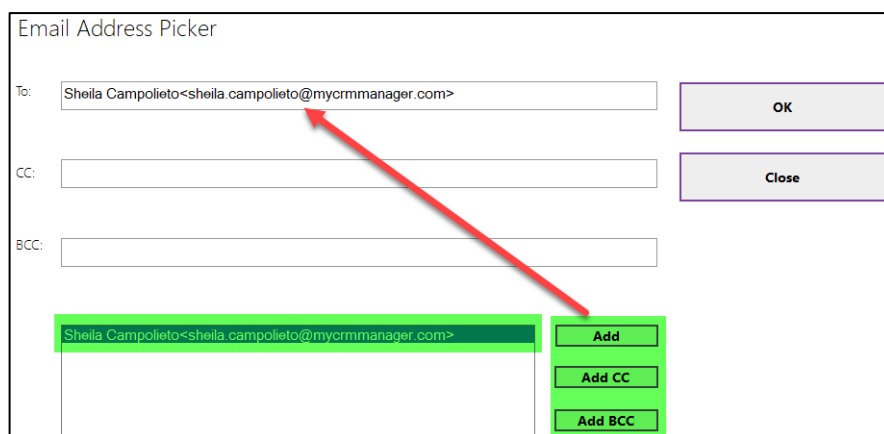
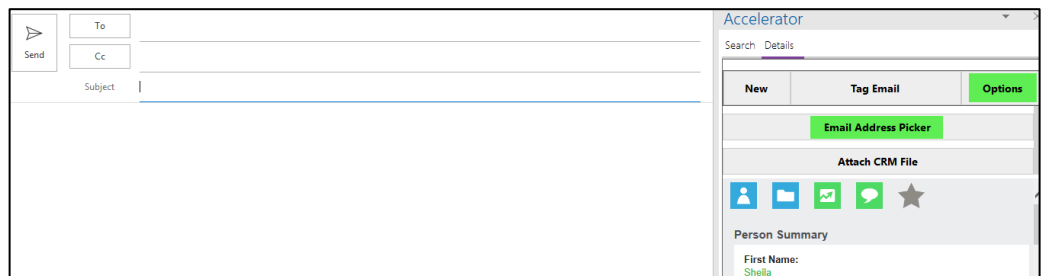
1. New Email

- a. Allows you to search for and select an entity in CRM before using Send and File or selecting an Email Template with merged fields

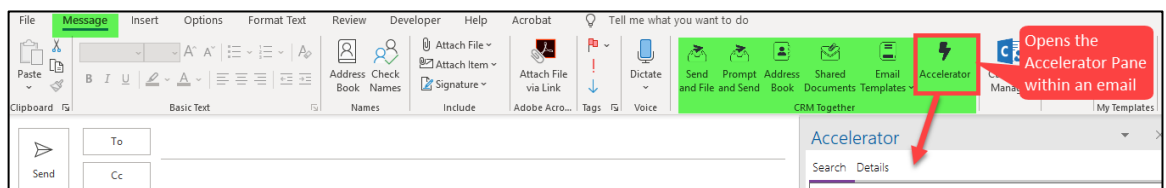
From the new email, click on the Accelerator icon > Search > Entities > Person (or Company) > enter name of Person (or Company) > Go > double click to select entity



- b. Email Address Picker – allows you to search for and select an email address saved in CRM from the selected entity
 - i. Select the appropriate Person record > Options > Email Address Picker
 - ii. select the email address > Add/Add CC/Add BCC > OK



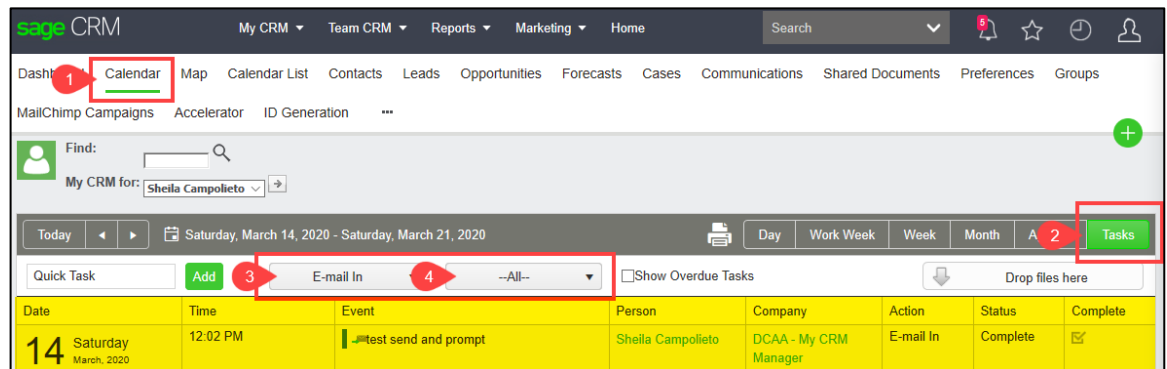
- c. Accelerator Ribbon



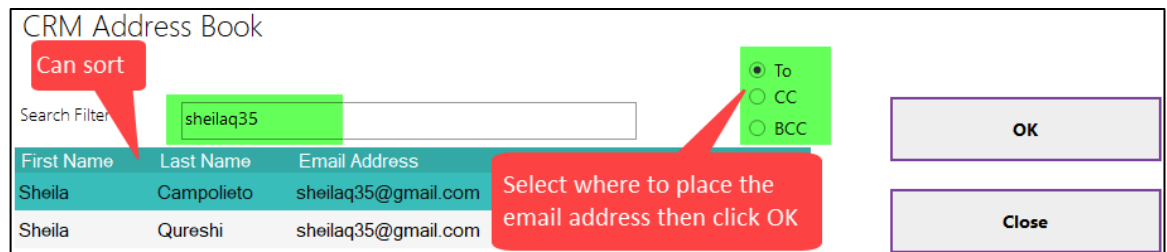
Send and File – sends the email and files it to CRM if the email address in the To field matches an email address in CRM (see [Email Matching](#) under [Incoming Emails](#) for more details)

NOTE: If there is no email address match in CRM, and you use Send and File, the email will not be filed to a specific record and there will be no ‘warning’ message letting you know. The email will instead be saved to the User’s Tasks and can be found here:

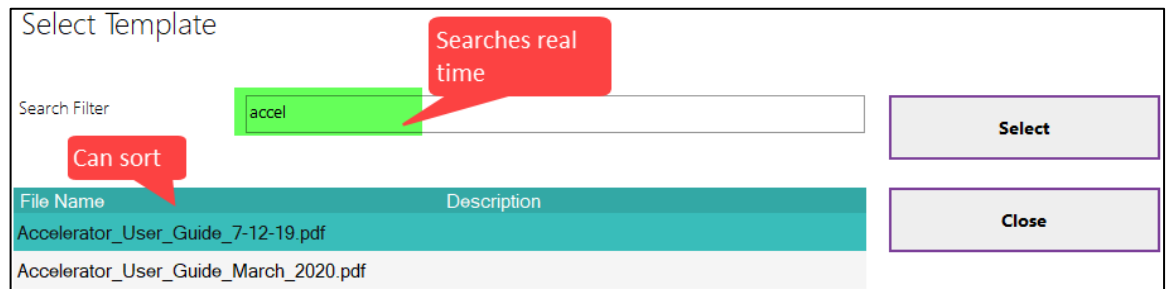
Calendar > Select Tasks > Select Email In > Select All



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

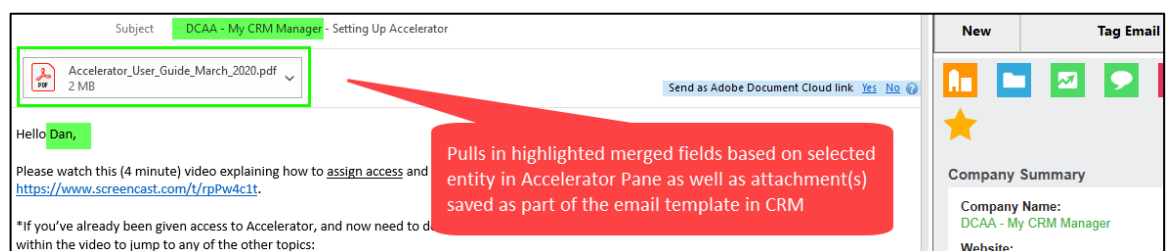
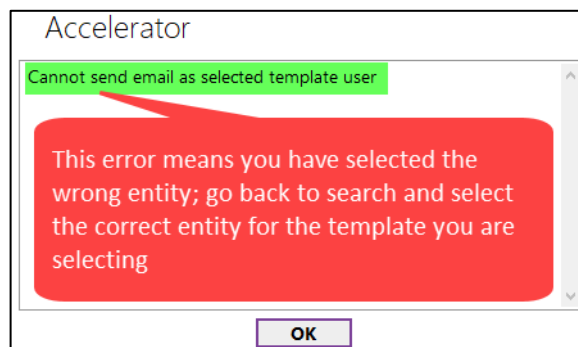
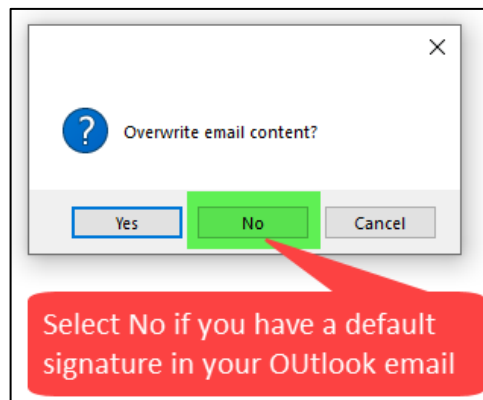
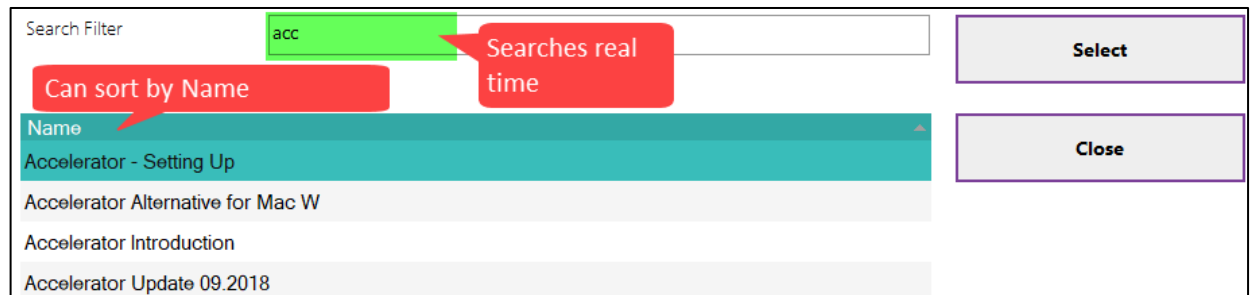
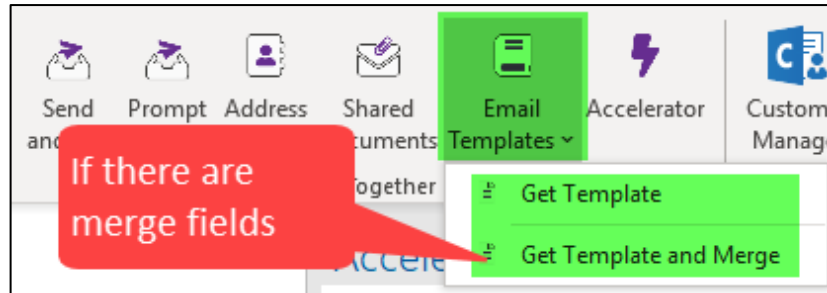


Shared Documents – allows you to attach a Shared Document where there are CRM documents associated with a specific entity, they can be accessed from here and attached to an outgoing email



Email Templates – accesses email templates saved in CRM, with saved attachment(s) if applicable, and allows you to select and send from Outlook so you can efficiently run your business and streamline communications (if there are merge fields, you must first select the appropriate entity – see [New Email](#) under [Outgoing Emails](#) for more details)

Email Templates continued...

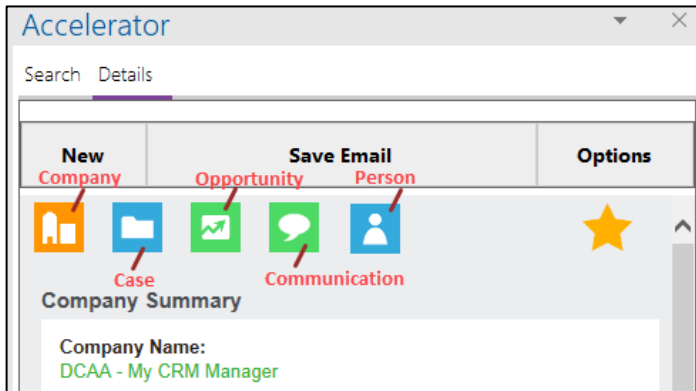


Accelerator Information Menu

1. Context-Specific Information

The icons shown in the Accelerator Pane match those used in Sage CRM

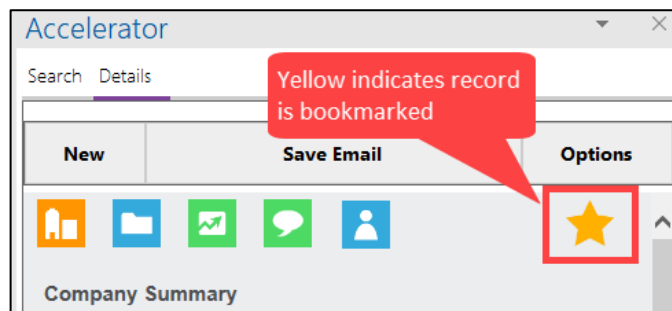
From one record, you can select and view other records tied to it. For example, from the Company record, select the Person icon to see a list of Persons associated with the Company. Then, click on the small Person icon from the list to see the Person Summary.



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

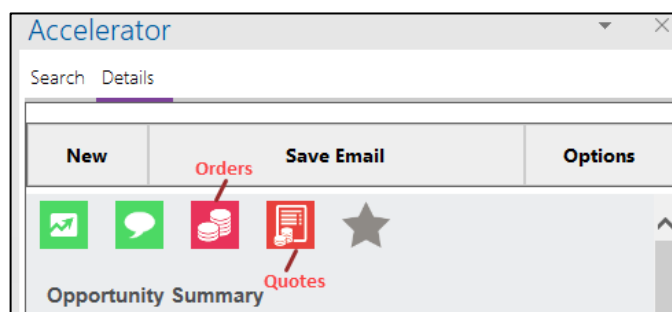
a. Bookmarks

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



b. Quotes and Orders

The information offered is extended to include Quotes and Orders, if applicable, from the corresponding Opportunity. Click on the Quote or Order icon to see the details.





[Contents](#)

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 details and 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://crmttogether.com/products/accelerator/>.