

Sage CRM 7.3

Overview of Sage CRM Templates for Sage Enterprise Intelligence

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What is Sage Enterprise Intelligence?

Sage Enterprise Intelligence (SEI) is an intuitive Business Intelligence solution that lets you transform complex, fragmented data into meaningful information.

SEI integrates fully with Sage Business Management Solutions (BMS) and Sage CRM. It provides intuitive tools that let you securely access and analyze enterprise data from these systems. For more information, see sei.sagex3.com.

How does SEI work?

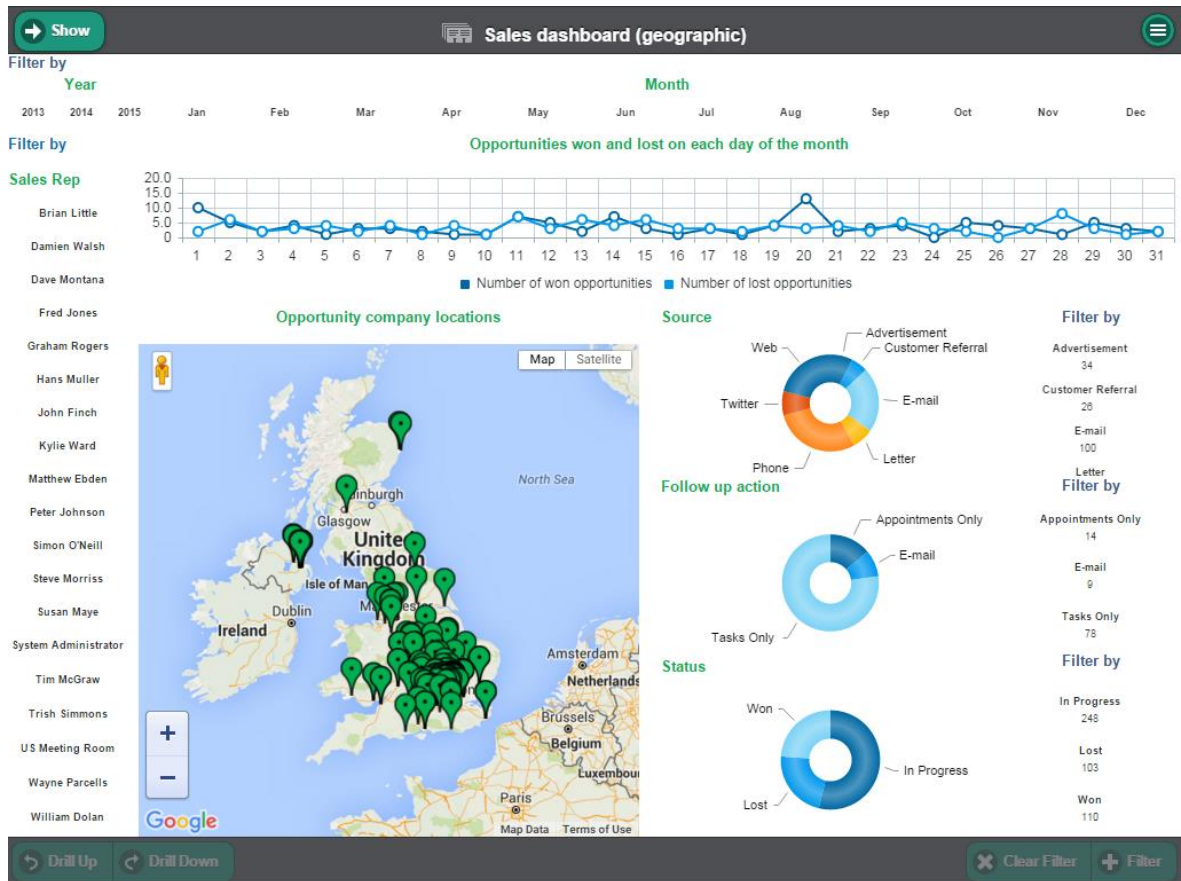
SEI is installed on a server that can access Sage BMS and Sage CRM databases. It uses a system administrator password to access the databases. Real-time data from the databases is surfaced on dashboards in SEI to provide coherent insight on all your enterprise data.

What are Sage CRM templates for SEI?

Sage CRM templates for SEI are prebuilt templates that access the Sage CRM database and surface real-time CRM data on SEI dashboards. There's also a Sage CRM / Sage BMS dashboard template that surfaces data from CRM and BMS databases.

An SEI user can filter data on these dashboards to analyze, slice, and dice the data. The administrator can then schedule reports to be sent to other SEI users so they can also analyze the data. It's also possible to display the reports as gadgets in Sage CRM. For more information, see [Working with Sage CRM and SEI](#).

Sales Dashboard

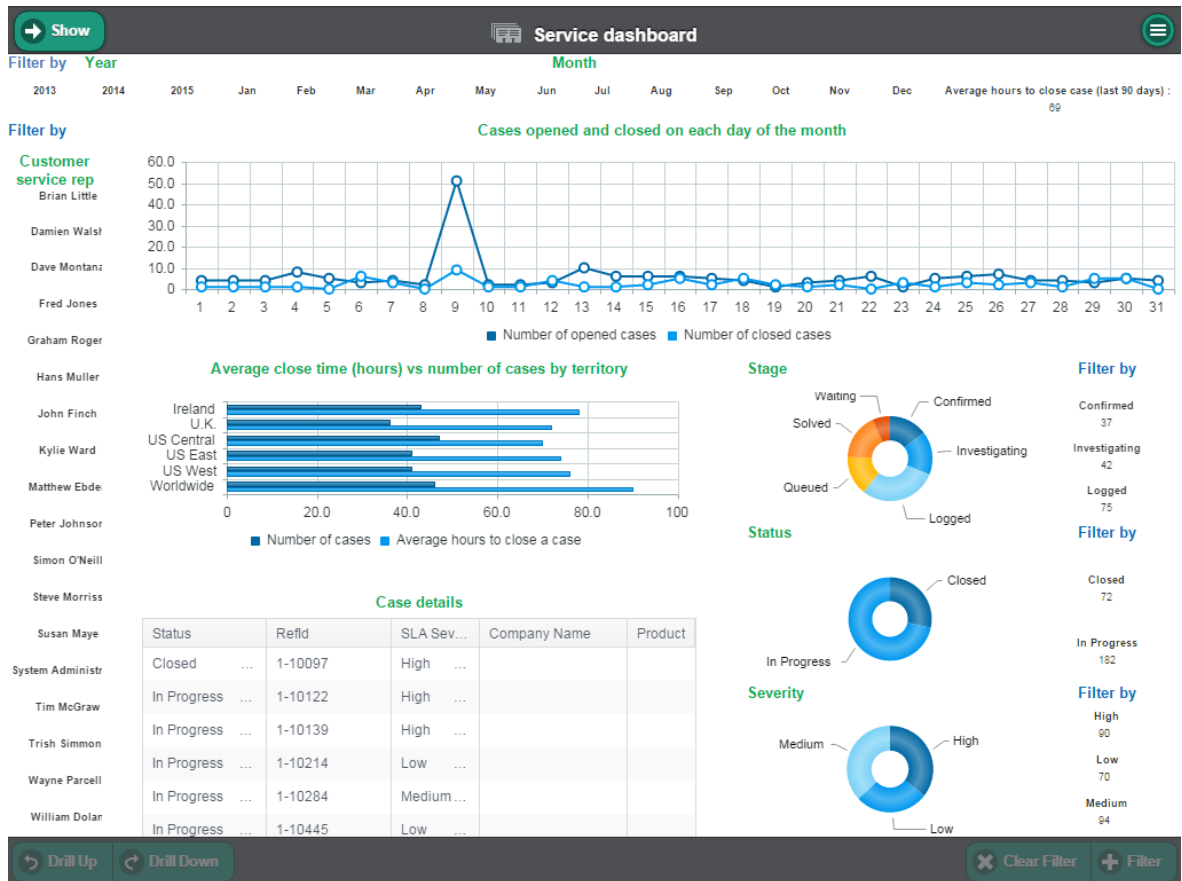


The **Sales dashboard** displays information about opportunities that were won and lost during a specific month. If the mapping component is installed on Sage CRM, the Sales dashboard (geographic) template can be imported to display geographical information with Sales information. It uses longitude and latitude data with Sage CRM data.

You can filter opportunity information by:

- Year and month.
- Sales representative assigned to the opportunity.
- Source of the opportunity.
- Follow-up action taken on the opportunity.
- Current status of the opportunity.

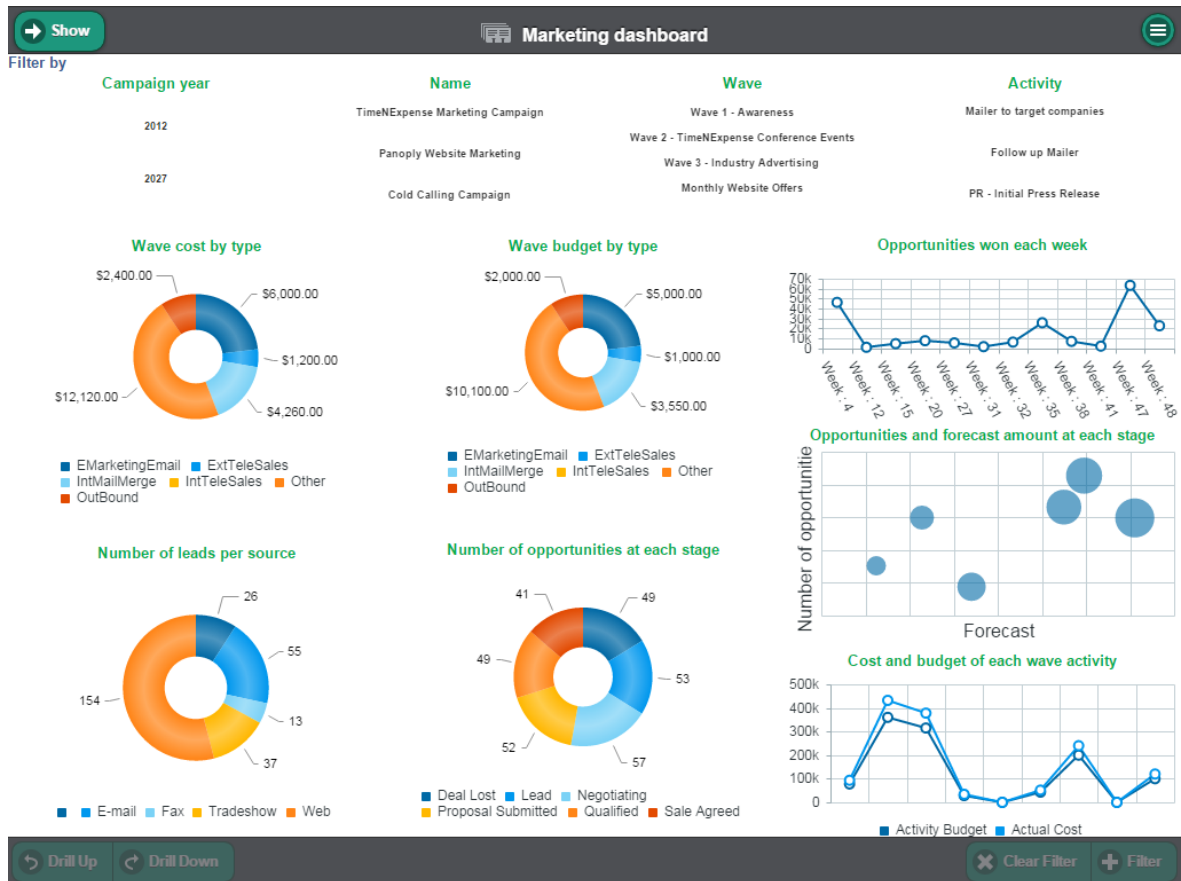
Service Dashboard



The **Service dashboard** displays information about cases that were opened and closed during a specific month. You can filter case information by:

- Year and month.
- Customer service representative assigned to the case.
- Current stage of the case.
- Current status of the case.
- Current severity of the case.

Marketing Dashboard



The **Marketing dashboard** displays information about opportunities, forecasts, and campaign costs for a specific week. You can filter information by:

- Campaign year
- Campaign name
- Wave
- Wave activity

Sage CRM / Sage BMS Dashboard



The **Sage CRM / Sage BMS dashboard** displays information about orders, leads, returns, margins, and forecasts. You can filter information by year and month. This dashboard is an example of how Sage CRM data can be combined with information from any other data source to produce intelligent reports.

Working with Sage CRM and SEI

Working with Sage CRM templates in SEI

- The System Administrator configures the SEI data source environment for Sage CRM, and imports the associated templates into SEI. For more information, see the *SEI Sage CRM Templates Installation Guide*.
- If the Sales dashboard (geographic) template is imported, a view is required to store longitude and latitude data. If this view doesn't exist, it's created using a script when the template is installed.
- Users can filter the data in the dashboards to build reports and send the reports to other people. For more information, see *the SEI User Guide*.

Working with SEI reports in Sage CRM

You can create a web gadget on a dashboard in Sage CRM to display an SEI report.

1. In Sage CRM, click **My CRM | Dashboards** and open the dashboard to which you want to add the gadget.
2. Click **New Gadget | Create Gadget**.
3. Click **Web Site**.
4. Enter the URL of the relevant SEI installation. Use the format `http[s]://www.website.com`.
5. Click **Next**.
6. Add a **Name** and **Description** for the gadget.
7. Click **Finish**.