

Sage CRM

Sage CRM 2016 R1

Twitter

Add-On Guide

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Chapter 1: About this guide

This guide is for Users and System Administrators, who want to install and work with the Sage CRM Twitter Add-on.

The Twitter add-on embeds Twitter timelines into My CRM, customer records, and marketing campaigns – and lets you tweet directly from all these key customer interaction points.

The Twitter Add-on has been updated to support Twitter 1.1 API and also includes the following enhancements:

- See how many times a Tweet has been re-tweeted.
- Select links within tweets, and they will open in a new window.
- Select a hashtag (e.g. #SageCRM) to browse results on the right hand-side.

Note: Some features described, for example Campaign Management, are not available in all editions of Sage CRM. Please refer to the Editions Matrix in the in-product help for more information.

We assume that:

- Users are familiar with Sage CRM and Twitter.
- System Administrators are fully conversant with the User Guide and System Administrator Guide.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Setting up the Twitter add-on (page 2-1)	How to install and uninstall the Twitter Add-On.
Working with the Twitter add-on (page 3-1)	How to work with the Twitter from My CRM, Company, Person, and Campaign contexts.

Terms & Conditions and Licensing information

By installing this component (add-on) you understand and agree that we will use technology to track your usage of this application (on an anonymous basis). You also agree that we may contact you for the purpose of gathering your feedback on this component. For more information please read our privacy policy (<https://www.sagecrm.com/ireland/privacypolicy/>)

Disclaimer

This software component (add-on) is licensed by us to you on a non-exclusive "as is" basis, which means that we do not offer you any assurances in respect of it. By installing and using this software

component you expressly understand and agree that you do so at your own discretion and risk. You are solely responsible for any loss or damage that you suffer as a result of you downloading, installing and using this software component. We (or our licensors) own all of the intellectual property rights to this software component. You must not use this component in any way that would adversely affect or that is inconsistent with our rights under applicable law. You will indemnify us against all losses, claims and damages which arise out of your breach of our (or our licensor's) intellectual property rights, unauthorized use of the component or any breach by you of this notice.

Chapter 2: Setting up the Twitter add-on

In this chapter you will learn how to:

- "Installing the Twitter add-on" below
- "Uninstalling the Twitter add-on" below

Installing the Twitter add-on

1. Click <My Profile> | Administration | Add-ons.
2. Click **Install** on the Twitter panel.

When the add-on is installed, **Install** changes to **Uninstall**.

Uninstalling the Twitter add-on

1. Click <My Profile> | Administration | Add-ons.
2. Click **Uninstall** on the Twitter panel.

When the add-on is uninstalled, **Uninstall** changes to **Install**.

Saved Tweets remain in the Company and Person Notes tabs.

Chapter 3: Working with the Twitter add-on

In this chapter you will learn how to:

- "Associating a Twitter account with your Sage CRM logon" below
- "Navigating the My Twitter tab" below
- "Following a company's Tweets " on the next page
- "Following a person's Tweets " on the next page
- "Tracking campaign tweets" on the next page

Associating a Twitter account with your Sage CRM logon

1. Click the **My Twitter** tab on the Main menu.
2. Click **Continue**. A Twitter window is displayed.
3. Enter your Twitter logon details to authorize Sage CRM to use your Twitter account.
4. Click **Authorize App**.

You can start working with Twitter from Sage CRM.

To stop Sage CRM using your Twitter account at any time, click **Revoke Access** from the Apps section of your Twitter profile page.

Navigating the My Twitter tab

Once you've associated a Twitter account with your Sage CRM logon, there is lots you can do from the **My Twitter** tab available on the Main Menu.

- **Post a new Tweet** to your Twitter account from the status box, **What's happening?**. The Twitter account this will come from is shown at the top of the status box.
- **Change the Twitter account** associated with your Sage CRM logon by clicking on the **pencil icon** at the top of the status box next to where your current Twitter account name is displayed.
- **View Tweets** posted or by any Twitter users you follow from the **Timeline**.
- **Search Twitter** by entering keywords and hashtags. Select the **Remember Search** check box to have Sage CRM present this particular search the next time you visit the My Twitter tab.
- **Refresh** the timeline or search results by selecting the refresh icon at the top of those panels.
- **Reply to a Tweet** by highlighting the Tweet you want to reply to, and click Reply.

Following a company's Tweets

"I've got someone from Sage Technologies on the phone for you..."

To view the Tweets from the Twitter "handle" of a company in Sage CRM:

1. Search for and then open a company record, for example, Sage Technologies.
2. Select the **Twitter** tab and then enter and save the Twitter handle, for example, **@wwwsagecrmcom**. Recent Tweets from the selected Twitter handle are displayed.

Once the Twitter handle is associated with a company, the most recent Tweets will display every time you or any other Sage CRM user view the Twitter tab of that company.

The search box works in the same way as the one on the My Twitter tab, except when you select the Remember Search check box, the search is saved against the company you are viewing.

Tweets displayed on the Company Twitter tab can be saved as a note against the company. To do this:

- Highlight the Tweet and select **Save As Note**.

Following a person's Tweets

To view the Tweets from the Twitter "handle" of a person in Sage CRM:

1. Search for and then open a person record.
2. Select the **Twitter** tab and then enter and save the Twitter handle. Recent Tweets from the selected Twitter handle are displayed.

Once the Twitter handle is associated with a person, the most recent Tweets will display every time you or any other Sage CRM user view the Twitter tab of that person.

The search box works in the same way as the one on the My Twitter tab, except when you select the Remember Search check box, the search is saved against the person you are viewing.

Tweets displayed on the Person Twitter tab can be saved as a note against the person. Just highlight the Tweet and select **Save As Note**.

Tracking campaign tweets

To track Tweets associated with a marketing campaign:

1. Click **Marketing** on the Main Menu, and open an existing campaign.
2. Click the **Twitter** tab.
3. Enter the Twitter logon details for the account associated with this campaign.
4. Click **Authorize App**. You can start working with Twitter from within the campaign.

Note: Once the Twitter account is associated with the campaign, all users with access to the campaign also have access to post Tweets on the associated Twitter account.

