

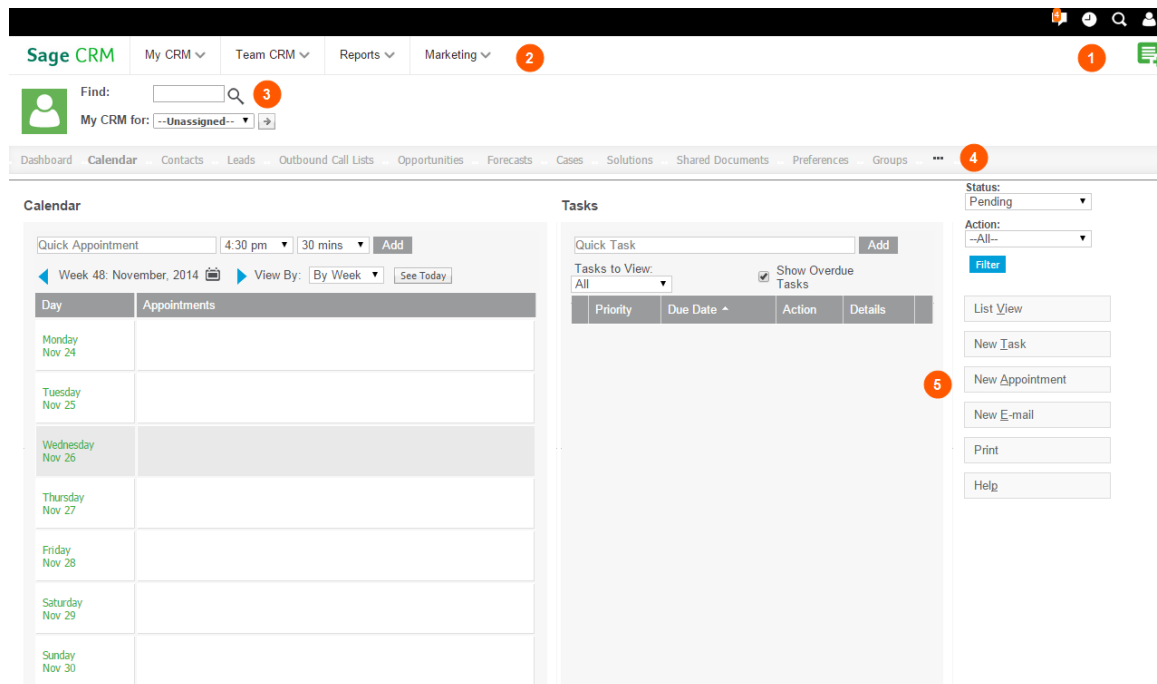
Sage CRM 7.3

Contemporary Theme

Introduction

The **Contemporary Theme** is an optional User Interface theme for existing Sage CRM customers and the default theme for new Sage CRM customers. The theme has been designed to help you be more productive and access the information you need more easily. In the sections below, we introduce what's different in this theme and explain how to take advantage of new features such as your user profile and horizontal navigation.

The Contemporary theme differs from the default Sage CRM theme in several ways.



1. [Top Bar](#) icons and buttons let you quickly view your notifications, recently viewed records, and your profile area. You can also easily return to your home page, and find and create new records.
2. [Main Menu](#) drop-down lists let you access all Main Menu options, including My CRM and Team CRM options, from anywhere in Sage CRM.
3. The **Find** field lets you quickly search for other Sage CRM users, so you can switch from **My CRM Mode** to the My CRM Mode of a colleague. You can also switch from your **Team CRM Mode** to the Team CRM Mode of another team. Your System Administrator must grant you permission to do this.
4. Horizontal tabs allow you to easily navigate through all subpages of an existing record.
5. Restyled action, workflow, and Help buttons are located on the right-hand side of each screen so you always know where to find them.
6. The Administration area has new icons and a new background color to match the look and feel of the Contemporary Theme UI.

Changing the default theme at a system level

As a System Administrator, you can apply the new Contemporary theme across the Sage CRM system. However, if a user has already selected a preferred theme, your system change won't affect that user's preference.

1. Click **Administration | System | System Behavior**. The System Behavior page is displayed.
2. Click **Change**.
3. Choose **Contemporary** from **Default System Theme** and click **Save**. The new theme is displayed the next time you log on.

Changing the default theme at a user level

As a user, you can set the new Contemporary theme as your preferred theme.

1. Click **My CRM | Preferences**.
2. Click **Change**.
3. Choose **Contemporary** from **Preferred Theme** and click **Save**. You must log off and log on again to see the new theme.

Top Bar



Use the Top Bar to quickly


1. Navigate to your homepage
2. Manage your notifications
3. Return to recently viewed records
4. Search existing records
5. Access your profile
6. Create new records and communications

Navigating to your home page

Sage CRM


Click the Sage CRM logo on the left side of the Top Bar to return to your preconfigured home screen. You can configure your home screen in **<My Profile> | Preferences | Log me Into.**

Managing your notifications

Click **Notifications**  on the Top Bar to display a list of outstanding notifications.


- Notifications are usually reminders for tasks or appointments, but can also be system alerts set up by you or your System Administrator.
- The number of notifications you have is displayed above the **Notifications** icon.
- Click a notification in the list and click **View Original** to open the record, appointment or task it relates to on the main screen.
- To clear a single notification reminder, click **X** beside the notification. To dismiss all notifications, click **Clear All**.
- To snooze a single notification reminder, click **Snooze for** beside the notification and choose a snooze duration.
- To snooze all reminders, click **Snooze all for** at the top of the list and choose a duration.
- To close your Notifications list, click **Notifications**.

Returning to recently viewed records

Click **Recent**  on the Top Bar to quickly find and return to the records you were most recently dealing with.

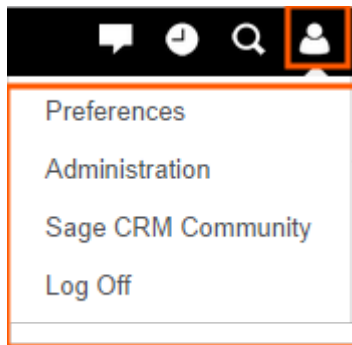
- Company, Person, Opportunity, Quote, Order, Lead, Case, Solution, Campaign, and Group records are saved in the Recent list. The list displays a limit of 10 records per entity.
- Click a record name to open it on the main screen.
- Click an entity icon to open the entity's Find screen.
- To empty your Recent list, click **Clear** at the bottom of the list.
- To change the maximum number of records in your Recent list, contact your System Administrator. The default maximum number is 40 records.

Searching existing records

Click **Find**  on the Top Bar to quickly search for Sage CRM records in three ways.

- Using Find screens: To perform a search across a particular Sage CRM entity, click **Find** and click the entity type from the list. For example, to search across all Company records, click **Find | Company**.
- Using Advanced Find: To perform a complex database search across Sage CRM entities, click **Find | Advanced Find**. For more information, see *Using Advanced Find* in the User Guide.
- Using Keyword Search: To perform a search across all main Sage CRM entities at once, click **Find | Keyword Search**. For more information, see *Searching Using Keyword Search* in the User Guide.


Accessing your user profile



Click **<My Profile>**  on the Top Bar to:

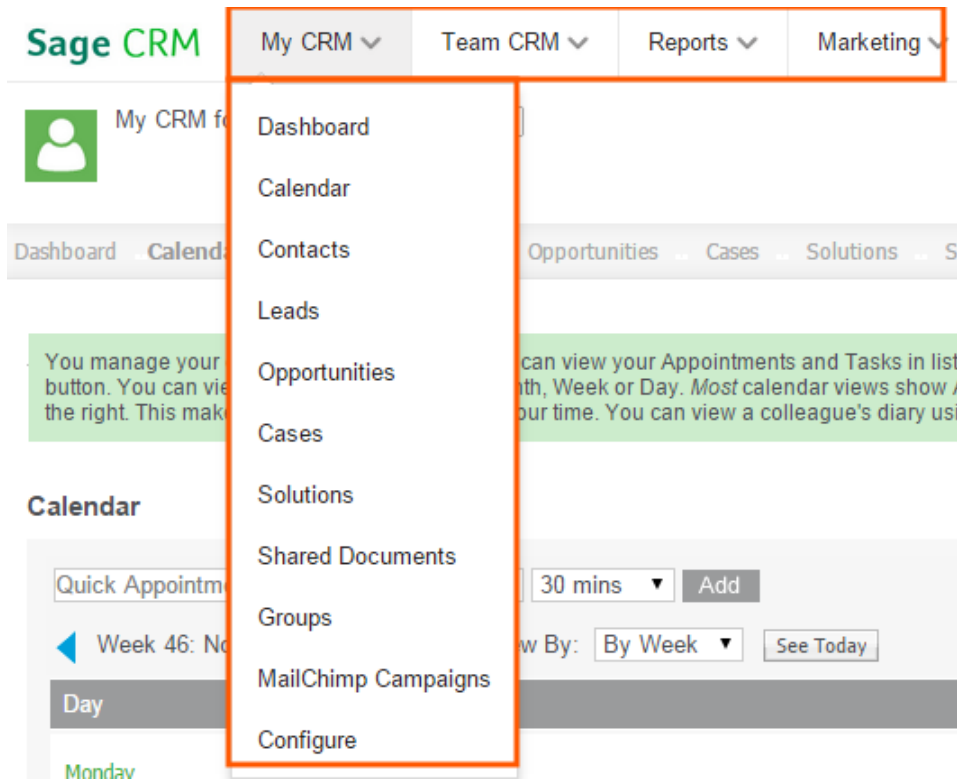
- Access and edit your **Preferences**.
- Go to the **Administration** area if you've got Administrator rights.
- Navigate to the [Sage CRM Community](#). You'll find blog articles, additional PDFs, white papers, customer stories, and user forums.
- **Log off** Sage CRM.

Creating a new record or communication

Click **New**  on the Top Bar to create a new record, task, appointment or email from any area in Sage CRM. You can also perform a mail merge from here.

- To add a new record or communication in the context of the record that's currently open, click **New**.
- To create a mail merge that exports to a PDF document, click **Merge to PDF**.
- To create a mail merge that exports to a Word document, click **Merge to Word**. The availability of this option depends on your system settings.

Main Menu



Use the Main menu options to navigate to commonly used areas in Sage CRM. These include your Dashboard, your Calendar, and primary entities that you work with such as People, Companies, and Opportunities, as well as any entities created with the Advanced Customization wizard. The Contemporary Theme allows you to access the Main Menu options from anywhere in Sage CRM. The options are grouped into four drop-down lists that are always displayed at the top of the UI, regardless of the context you're in.

- To open a Main Menu option, click the relevant drop-down list and choose a menu option. For example, to open your Dashboard, click **My CRM | Dashboard**.
- You can easily configure the tabs that are included in the **My CRM**, **Team CRM**, and **Reports** drop-down lists. Just click **<list name> | Configure**. Select the tabs you want to include and click **Save**.
- For more information about Main Menu options, see the *User Guide*.

Drop-down list	Main Menu options
My CRM	<ul style="list-style-type: none"> • Dashboard • Calendar • Contacts • Leads • Opportunities • Cases • Shared Documents • Groups • MailChimp Campaigns
Team CRM	<ul style="list-style-type: none"> • Calendar • Leads • Opportunities • Cases • Solutions
Reports	<ul style="list-style-type: none"> • My Favorite Reports • Activity Reports • Campaigns • Communications • Customer Service • General • Lead Reports • Marketing • Sales • Outbound Calls • Administrator Reports • All Report Categories
Marketing	<ul style="list-style-type: none"> • Campaign List • E-Marketing • Mass Email Status

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Document version code: THM-USE-ENG-730-1.0
