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About this guide

This guide is for Sage CRM System Administrators who are confident end users of Sage CRM. The navigation instructions in the guide assume that you're using the Contemporary Theme.

This guide refers to *Sage CRM* but your system might have a different brand name, such as *Sage 200 Sales and Marketing*. The system works in the same way regardless of its name. The functionality that's available to you depends on the modules that you're licensed to use.

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- Security management
- Teams
- User activity
- Active Directory users
- User templates
- Standard classic dashboards
Users

- Demonstration users
- Setting up a new user
- Creating an Info Manager
- Editing a user
- Configuring user settings
- Reassigning records and disabling users
- Enabling a disabled user
- Deleting a user
- User fields

Demonstration users

If you’ve installed demonstration data, the following users are created in Sage CRM. These users do not require passwords. If you have not installed demonstration data, only the admin user is created.

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<th>Profile</th>
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<tr>
<td>montanad</td>
<td>Dave Montana</td>
<td>Marketing Manager</td>
</tr>
<tr>
<td>mayes</td>
<td>Susan Maye</td>
<td>Sales</td>
</tr>
<tr>
<td>wardk</td>
<td>Kylie Ward</td>
<td>Customer Care Manager</td>
</tr>
<tr>
<td>admin</td>
<td>Administrator</td>
<td>System Administrator</td>
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Setting up a new user

1. Click <My Profile> | Administration | Users | New User.
2. Complete the User fields and click Continue.
3. Complete the More User Details fields and the Security Profile fields and click Continue.
4. Complete the User Preferences fields. If you haven’t selected a template, the user preferences default to those specified in the Default User Template.
5. Click Save.
   - Alternatively, click Save & New to save the new user and display the user panel so you can add another new user. This is useful if you need to create several new users sequentially.
Or click **Set To System Defaults** to reset user preferences to the default settings from the Default User Template.

## Creating an Info Manager

An Info Manager is a type of power user who can perform some system administration tasks but cannot access the entire administration area. For example, an Info Manager can upload templates, maintain currency conversion rates, and edit Interactive Dashboard templates.

You specify Info Manager access on the user's Security panel. For more information, see Security Profile fields.

When you set **Administration** to **Info Manager**, the following features are available to the user assuming the license and services are enabled for these features.

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You can also assign specific sub-sets of rights from **Info Admin Rights**. You can use **Ctrl + click** to select multiple sets of rights.
### Info Admin Rights

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</tr>
<tr>
<td>Product</td>
<td>&lt;My Profile&gt;</td>
<td>Administration</td>
<td>Data Management</td>
<td>Products</td>
</tr>
<tr>
<td>Timings</td>
<td>&lt;My Profile&gt;</td>
<td>Administration</td>
<td>System</td>
<td>Timings</td>
</tr>
<tr>
<td>Summary Reports</td>
<td>&lt;My Profile&gt;</td>
<td>Administration</td>
<td>Customization</td>
<td>Primary Entities / Secondary Entities</td>
</tr>
<tr>
<td>Key Attribute Profiling</td>
<td>&lt;My Profile&gt;</td>
<td>Administration</td>
<td>Advanced Customization</td>
<td>Key Attributes</td>
</tr>
</tbody>
</table>
An Info Manager can work with:

### User
- My CRM | Groups | Mass Update
- <My Profile> | Administration | Users | New User
- <My Profile> | Administration | Users | Users (view-only access to the Security tab on users)
- <My Profile> | Administration | Users | Security
- <My Profile> | Administration | Users | Import Users
- <My Profile> | Administration | Users | User Templates
- <My Profile> | Administration | Users | Standard Classic Dashboards

### Workflow and Escalation
- <My Profile> | Administration | Advanced Customization | Workflow
- <My Profile> | Administration | Advanced Customization | Escalation
- <My Profile> | Administration | Advanced Customization | Workflow & Escalation Configuration
- <My Profile> | Administration | Customization | Primary Entities /Secondary Entities | <Entity> | Notifications

### Extra
Available with the Extensibility Module only. The user has access to a customized Administration area. You configure this in <My Profile> | Administration | Advanced Customization | System Menus | AdminExtraTabs. For more information about the Extensibility Module, see the Developer Help on the Sage CRM Help Center.

---

**Editing a user**

1. Click <My Profile> | Administration | Users | Users.
2. Enter the user's Last Name and click Find.
3. Click the user hyperlink.
4. To change user details, click Change.
   a. Make your changes to the User fields.
   b. Make your changes to the More User Details fields.
   c. Click Save.
5. To change user preferences, click the User Preferences tab and click Edit.
   a. Make your changes to the User Preferences fields.
   b. Click Save.
6. Users can change their preferences in <My Profile> | Preferences. Updated settings are immediately reflected in <My Profile> | Administration | Users | User Preferences.
7. To change user security profile rights, click the **Security** tab.
   a. Click the profile the user is currently associated with.
   b. Make the changes to the **Security Profile fields** and profile rights.
   c. You can view and navigate to the Security Profile assigned to a user from the Security tab. If the user has direct rights into any territories, you can edit them on this tab.
   d. You can switch a user’s existing profile in **Profile Name** on the **User Details** tab. For example, from Sales Manager to Marketing Manager.
   e. Click **Save**.

### Configuring user settings

User configuration settings apply to all users who work with Sage CRM.

1. Click **<My Profile> | Administration | Users | User Configuration**.
2. Click **Change**.
3. Change the **User Configuration Settings fields**.
4. Click **Save**.

### Reassigning records and disabling users

You can disable a user who is out of the office for a prolonged period of time or who has left your organization. Communications cannot be scheduled for the user, and new opportunities or accounts cannot be assigned to the user. A disabled user doesn’t appear in your user license count. The disabled user still appears in the My CRM user list so that the user’s history can be reviewed, and the user’s name is displayed on customer contact history information such as completed communications and closed opportunities.

You can reassign records from a disabled user to a colleague. You might do this if the user has a large outstanding workload or accounts that need careful management.

1. Click **<My Profile> | Administration | Users | Users**.
2. Enter the user’s **Last Name** and click **Find**.
3. Click the user hyperlink.
4. Click one of the following options:
   - To disable the user without reassigning their records, click **Disable**. The User Details page is displayed with a blue banner showing that the user has been disabled.
   - To reassign the user’s records to a colleague without disabling the user, click **Reassign**. Follow the steps below to reassign the records.
   - To reassign the user’s records to a colleague and disable the user, click **Reassign and Disable**. Follow the steps below to reassign the records.
5. Ensure that the user to whom the records are reassigned has appropriate security rights. For example, the user should have access rights to the disabled user’s territory.
6. Choose the user or team to which the records are reassigned.

7. Select one of the following checkboxes.
   - **Companies** reassigns the Account Manager of the company to the user or team member.
   - **People** reassigns the Account Manager of the person to the user or to team member.
   - **Always reassign the records within the company/person to a single user** reassigns all child records that are related to the reassigned Company or Person records, and owned by the previous user, to the team member. People in the company who were owned by the previous user are reassigned to the team member. People who are owned by a different user are not reassigned to the team member and remain unchanged.

8. Select records and record status in the Reassign Other Records panel. For example, reassign all pending or in progress communications and all in progress opportunities. When you reassign communications, tasks are always reassigned. Appointments and email outs are reassigned only if they don't already exist for the new user.

9. Click Go.

10. Review the reassigned records summary, and click **Continue** to return to the User Details screen.

### Enabling a disabled user

1. Click **<My Profile> | Administration | Users | Users**.
2. Select **Disabled**. A list of all disabled users is displayed.
3. Click the user hyperlink.
4. Click **Enable**.

### Deleting a user

**Warning**: Delete a user with extreme caution and only if you've added a new user by mistake. If a user is no longer with your organization, disable the user instead of deleting the user.

If you must delete a user and the user has any related records, reassign the records first. If you don't reassign the records and then you delete the user, the records remain in Sage CRM with an untranslated code in the user name. This makes it very difficult to keep an accurate customer history.

1. Click **<My Profile> | Administration | Users | Users**.
2. Enter the user's **Last Name** and click **Find**.
3. Click the user hyperlink.
4. Click **Delete** and then click **Confirm Delete**.
## User fields

- User fields
- Security Profile fields
- More User Details fields
- User Preferences fields
- CSV input/output matrix
- User Configuration Settings fields

### User fields

The table below explains the standard fields on the User panel.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>User's first name. For example, Susan.</td>
</tr>
<tr>
<td>Last Name</td>
<td>User's last name. For example, Maye.</td>
</tr>
<tr>
<td>Email</td>
<td>Work email address.</td>
</tr>
<tr>
<td>User Name</td>
<td>User's logon ID. A user name entered with a leading or trailing space is</td>
</tr>
<tr>
<td></td>
<td>trimmed automatically to remove these.</td>
</tr>
<tr>
<td>Password</td>
<td>User logon password. The password is encrypted in the database after the</td>
</tr>
<tr>
<td></td>
<td>first password change. A minimum password length can be defined within the</td>
</tr>
<tr>
<td></td>
<td>Configuration settings. For more information, see User Configuration Settings</td>
</tr>
<tr>
<td>Administration</td>
<td>Sets the administration rights of a user. Choose from: No Admin Rights—</td>
</tr>
<tr>
<td></td>
<td>for a basic user with no access to Administration. Info Manager—has the</td>
</tr>
<tr>
<td></td>
<td>rights to edit existing reports and add new ones, and has rights to the</td>
</tr>
<tr>
<td></td>
<td>Marketing button. Also has limited access to Administration. The choices</td>
</tr>
<tr>
<td></td>
<td>available in the Administration context area are dependent on the Info Admin</td>
</tr>
<tr>
<td></td>
<td>Rights defined in Info Admin Rights field. For more information, see Creating</td>
</tr>
<tr>
<td></td>
<td>an Info Manager. System Admin—has full access to Administration. From</td>
</tr>
<tr>
<td></td>
<td>Template—assigns the administration rights set in the template selected from</td>
</tr>
<tr>
<td></td>
<td>the User Template drop-down list.</td>
</tr>
<tr>
<td>User Template</td>
<td>Select a predefined user template from the list of existing templates. When</td>
</tr>
<tr>
<td></td>
<td>you select a template, all fields you specified when you created the</td>
</tr>
<tr>
<td></td>
<td>template are applied to the current user.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Primary Team</td>
<td>The default team that's displayed when the user clicks Team CRM. It's also the only team that's displayed if no teams have been selected in the Display Teams field.</td>
</tr>
<tr>
<td>Home Territory</td>
<td>Security territory of the user. For example, USA. A user with a Home Territory of USA can access records in the USA territory, and records in subordinate territories—for example, West, East, Mid-West, South, North. If no security territories are set up, this defaults to the World Wide territory. The World Wide territory allows access to records in all territories. For more information, see Adding records to a territory.</td>
</tr>
<tr>
<td>Synchronize With Exchange Server</td>
<td>Read-only field available when Exchange Server Integration is enabled. Only visible when the user record is in view mode. When a user’s mailbox has been enabled for synchronization with Exchange, the check box is selected. For more information, see Enabling user mailboxes for synchronization.</td>
</tr>
<tr>
<td>Resource</td>
<td>Set to True, the user exists in the user table and is selectable from all user selection lists in the system. However, the user does not have rights to log into the system (and does not require a user license). This means that, for example, a meeting room resource can be set up as a “user” to facilitate meeting scheduling, without using up a user license.</td>
</tr>
<tr>
<td>E-marketing User</td>
<td>Only available when adding a new user if an E-marketing account has already been set up from Sage CRM. Selecting this check box adds two further steps in the User Setup wizard. The fields are described in E-marketing account and user fields.</td>
</tr>
<tr>
<td>Show Exchange Server Integration Logs</td>
<td>Available when Exchange Server Integration in enabled. Set to Yes to display a new tab, Exchange Integration Logs, in My CRM. This gives the user access to their own logs, which display information on conflicts, skipped items and synchronization, specific to their Exchange mailbox.</td>
</tr>
<tr>
<td>License Type</td>
<td>Only available in installs with Concurrent licensing. Select from Named or Concurrent. Named should be selected for users who require permanent access. For example, System Administrators and permanent staff. Select Concurrent for shift workers, part-time staff, data entry temporary staff etc.</td>
</tr>
<tr>
<td>Disabled</td>
<td>Read-only check box, displayed after a user is saved. Checked when a user is disabled.</td>
</tr>
</tbody>
</table>

**Security Profile fields**

The table below explains the standard fields on the Security Profile panel.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>The security profile assigned to the user. Select from a list of existing profiles. If no profiles are set up, this defaults to the System Administrator's security profile, Profile 1. For more information, see Adding a new security profile.</td>
</tr>
<tr>
<td>Mobile Device Access</td>
<td>Allows access from a mobile device.</td>
</tr>
<tr>
<td>External Logon Allowed</td>
<td>Indicates whether the user can access Sage CRM from a remote location. Only available in systems with the EM (Extensibility Module). A third-party that needs to access the COM interface, must access Sage CRM as a user with this field set to True. For example, a user with this privilege is required for Exchange Server to access Sage CRM for Exchange Synchronization. Similarly, Self Server ASP pages need to access the system in this way.</td>
</tr>
<tr>
<td>Change P/W At Next Logon</td>
<td>The user is required to change their password the next time they log on. Once they have done so, this is automatically set back to False.</td>
</tr>
<tr>
<td>Password Never Expires</td>
<td>The password is only changed when the user wishes, or when the System Administrator resets it.</td>
</tr>
<tr>
<td>Cannot Change P/W</td>
<td>The password can only be changed by the System Administrator.</td>
</tr>
<tr>
<td>Password Expiry Date</td>
<td>Automatically set by the system according to Amount Of Days To Password Expiry on the User tab within the Configuration context.</td>
</tr>
<tr>
<td>My CRM Lists</td>
<td>Sets access to lists in the My CRM area. This can be set so a user sees only their own lists of pending work in the My CRM area list or lists of all other users.</td>
</tr>
<tr>
<td>Team Lists</td>
<td>Sets access to the Team CRM area. This can be set so a user sees their Primary and Display Teams (User's Team), all teams, or none.</td>
</tr>
</tbody>
</table>
| Reports               | **No Reports**: The user has no access to Reports.  
**Personal Reports**: The user can see, run, and edit their own private reports.  
**Enterprise**: The user can see, run, and edit any database stored report unless it is marked as private.  
**Crystal Reports**: The user can see reports in all these categories, as well as all Crystal Reports. Crystal is not currently supported by Sage CRM. This setting remains for backward compatibility for customers who are continuing to use unsupported versions of Crystal. |
<p>| Solutions             | Access levels for Solutions. Security access to Solutions is controlled using this setting only not using Territory Management.                                                                            |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Forecast Rights       | **For All Users In Territory:** Allows a manager to access the forecasts of other users in the same territory (or a territory below their own) by changing the user name in My CRM.  
**For This User Only:** A user can only access their own forecast. |
| Restrict Sensitive Info | Specifies rights for viewing sensitive company information.  
**No Restriction:** The user’s access to sensitive company information in tabs is not dependent on being a member of the Company Team.  
**Must Be On Company Team:** The user is able to view sensitive company information (Quick Look, Notes, Communications, Opportunities, Cases, and Documents tabs) only if the user is a Company Team member for the current company being viewed. However, if the user is the account manager for the current account, the user has unrestricted access to tabs. |
| Restrict Updates       | Specifies rights for updating sensitive company information. The settings work in conjunction with the value in **Company Team**.  
**No Restriction:** The user’s update rights are not dependent on membership of the Company Team. However, territory access rights still apply.  
**Must Be On Company Team:**  
If **Company Team** is set to No Access or View Only, the user is not allowed to update company records. This restriction is implemented by hiding the Change button. This setting is not dependent on team membership or territory access rights.  
If Company Team is set to View Only, Upd/Ins, or Upd/Ins/Del, the user can update company records only when a member of the Company Team for the current company being viewed. However, if the user is the account manager for the current account, update rights are unrestricted, territory access rights permitting. |
| Company Team           | Sets access to the **Company Team** tab.                                                                                                     |
| Merge Persons/Companies | Gives the user rights to deduplicate people and companies using the merge functionality.                                                       |
| Assign Individual To Company | Allows the user to associate a person with a company. Assigning a person to a company also moves all related communications, opportunities, and cases to the company. |
| Allow Web Service Access | Enables the current user for Web Service access.                                                                       |
Field | Description
--- | ---
Administration | Sets the administration rights of a user. There are three types: **No Admin Rights**: A basic user with no access to Administration. **Info Manager**: A user with more rights than the basic user (such as creating Interactive Dashboard templates) and limited access to Administration when combined with the Info Admin Rights field. For more information, see [Creating an Info Manager](#). **System Admin**: A user with full access to Administration.

Info Admin Rights | One or more specific Info Admin rights can be selected, if **Administration** is set to **Info Manager**. For more information, see [Creating an Info Manager](#).

Group Access | Enables the current user to access Groups functionality. Users who have not been granted access cannot view, create, or edit groups.

Mail Merge to Word | Allows the user to perform mail merges that create Microsoft Word documents and also to perform mail merges that create PDFs. If set to **No**, the user can only perform mail merges that create PDFs.

### More User Details fields

The table below explains the fields on the More User Details panel.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Department</td>
</tr>
<tr>
<td>Phone</td>
<td>Work phone number</td>
</tr>
<tr>
<td>Ext.</td>
<td>Work phone number extension</td>
</tr>
<tr>
<td>Display Team</td>
<td>The team queues that the user can view from Team CRM.</td>
</tr>
<tr>
<td>Home Phone</td>
<td>Home phone contact number.</td>
</tr>
<tr>
<td>Fax</td>
<td>Work fax number.</td>
</tr>
<tr>
<td>Mobile</td>
<td>Mobile phone number.</td>
</tr>
<tr>
<td>Language</td>
<td>Preferred language. Each user sees the same underlying data in the database, however the buttons, field names, and captions throughout the application appear in the user's selected language. If no template is selected, this defaults to the language set in the Default User Template.</td>
</tr>
<tr>
<td>Pager</td>
<td>Pager number</td>
</tr>
</tbody>
</table>
User SMS Notification: If SMS features are used and this option is set to True, an SMS notification message is sent to the user's mobile phone when communications are created for the user. Mobile Email Address must be correctly completed for this to work.

Mobile Email Address: Mobile phone email address. If the user's mobile phone email address is different from the user's normal email address, enter it here.

Forecasting - Reports To: Sales manager or direct report, who should have access to the selected user's forecast.

Forecast - Currency: Currency in which the forecast is calculated. If the user enters a forecast value on the Opportunity in a different currency, it's converted to the forecast currency set in Forecast.

Title: Title of the user.

Location: Usual office location of the user.

Desk Location: Desk location or mail stop.

User Preferences fields

Log Me In To: Determines the default first page when you log on. For example, Dashboard, Calendar, Case List, or Opportunity List. It is possible to add a new drop-down entry in <My Profile> | Administration | Customization | Translations to allow users to see a .ASP or .NET page as their first page. The caption family for this drop-down list is DefaultToDo. Enter the custom page name in Caption Code, for example, MYPAGE.ASP. For more information, see Translations list.

Empty Recent List For Each Session: Empties the Recent List each time you log off and back on again. The Recent List remembers the most recent pages you have visited in Sage CRM.

My Default Find Screen: Determines the Find screen that appears at the beginning of a session. The system remembers your last Find, until you change it. This means you can set your default Find screen to be Company. However, as soon as you search by Person, the next time you click Find, the person Find screen is displayed. Advanced Find, which is a feature that allows users to build SQL queries, is also an option.

Show Solutions In My CRM: Makes the Solutions tab available in My CRM.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Outbound Calls In My CRM</td>
<td>Makes the <strong>Outbound Calls Lists</strong> tab available in My CRM.</td>
</tr>
<tr>
<td>Currency</td>
<td>Currency in which monetary fields are displayed to the user. Implementation dependent.</td>
</tr>
<tr>
<td>Show Leads Pipeline</td>
<td>Displays the graphical pipeline of leads on the Leads tab within My CRM and Team CRM.</td>
</tr>
<tr>
<td>Show Opportunities Pipeline</td>
<td>Displays the graphical pipeline of opportunities on the <strong>Opportunities</strong> tab within My CRM, Team CRM, Company and Person contexts.</td>
</tr>
<tr>
<td>Show Cases Pipeline</td>
<td>Displays the cases pipeline on the <strong>Cases</strong> tab within My CRM, Team CRM, Company and Person contexts.</td>
</tr>
<tr>
<td>Grid Size</td>
<td>Determines the default maximum length of lists and grids on a page.</td>
</tr>
<tr>
<td>Email Screen Position</td>
<td>The way in which the New Email screen is displayed. Select from Normal or Popup or Split. The Normal and split options are ignored if you’re working with Sage CRM in Outlook. In this case, a new email is always displayed in a popup window.</td>
</tr>
<tr>
<td>Line Item Screen Position</td>
<td>The way in which the Line Item screen is displayed.</td>
</tr>
<tr>
<td>Report Print Preview Default Page size</td>
<td>The default orientation (Portrait or Landscape) used on the Report Display Options page for producing a report in PDF format.</td>
</tr>
<tr>
<td>Report Print Preview Default Orientation</td>
<td>The default page size used on the Report Display Options page for producing a report in PDF format.</td>
</tr>
<tr>
<td>On-screen Coaching</td>
<td><strong>On</strong>: Turns coaching on for all screens for which it is available. With this setting, the full coaching content is displayed in a panel at the top any screens that have coaching content. <strong>Off</strong>: Turns all coaching off. <strong>Minimized</strong>: The coaching panel does not appear automatically at the top of the screen. Instead, users can click the Maximize On-screen Coaching button to view the full frame for an individual screen. This setting might be employed for users who are familiar with Sage CRM and might need to view coaching only rarely. <strong>Customized</strong>: Allows users to minimize coaching on some screens while leaving it maximized on others.</td>
</tr>
<tr>
<td>Preferred Theme</td>
<td>The Contemporary theme is the only supported theme.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CSV File Export Delimiter</td>
<td>The delimiter that the CSV uses when the user clicks Export to File.</td>
</tr>
<tr>
<td></td>
<td>This setting does not affect the Excel CSV format, which is always tab</td>
</tr>
<tr>
<td></td>
<td>delimited. For more information, see CSV input/output matrix.</td>
</tr>
<tr>
<td></td>
<td>This setting impacts data uploads from CSV files. Ensure the delimiter in</td>
</tr>
<tr>
<td></td>
<td>the import file matches the delimiter set in &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Default Screen for Company</td>
<td>Sets the default tab that's displayed when a user drills into a Company.</td>
</tr>
<tr>
<td>Default Email Template</td>
<td>The default email template used when using the embedded email editor.</td>
</tr>
<tr>
<td>Default Email Address</td>
<td>The default From email address used in the New Email screen. You can</td>
</tr>
<tr>
<td></td>
<td>change your default From address if you have been given permission to</td>
</tr>
<tr>
<td></td>
<td>send emails from other accounts.</td>
</tr>
<tr>
<td>Default Tablet Version</td>
<td>Set to Desktop Version if you want to use the desktop version of Sage</td>
</tr>
<tr>
<td></td>
<td>CRM from a tablet device. Set to Tablet Version is you want to use the</td>
</tr>
<tr>
<td></td>
<td>Tablet theme from a tablet device.</td>
</tr>
<tr>
<td>Calendar View</td>
<td>The default calendar view.</td>
</tr>
<tr>
<td>Calendar Start Time</td>
<td>The start time of the calendar view on communications, and the shaded</td>
</tr>
<tr>
<td></td>
<td>area in the meeting planner.</td>
</tr>
<tr>
<td>Calendar End Time</td>
<td>The end time of the calendar view on communications, and the shaded</td>
</tr>
<tr>
<td></td>
<td>area in the meeting planner.</td>
</tr>
<tr>
<td>My Week Starts On</td>
<td>The first day of the weekly calendar view.</td>
</tr>
<tr>
<td>Date Format</td>
<td>Date format preference. For example, select mm/dd/yyyy to see the date</td>
</tr>
<tr>
<td></td>
<td>in Month/Day/Year format.</td>
</tr>
<tr>
<td>Use AM/PM</td>
<td>Yes: Uses AM/PM time format. No: Uses 24hr format.</td>
</tr>
</tbody>
</table>
Each individual user’s time zone can be set. There are 75 time zones to select from. The one you select defines what daylight settings are used, so you must be careful in selecting the correct zone. The zone you select also needs to correspond exactly to your computer setting. All times are relative to the logged on user. For example, a meeting made at 09:00 GMT... by one user appears at 10:00 to users in +1:00 GMT.... The time zone of the server is set by the System Administrator. If Automatic Daylight Saving Time is checked on the server machine, it affects all users, even if they have not selected this option themselves in their time zone settings.

If you need to add a new time zone to the list, this can be done via <My Profile> | Administration | Translations. For one new time zone, three new entries should be added - one for each of the caption families TimeZoneDelta, TimeZoneDeltaJava, and TimeZoneDeltaUTC. Follow the exact format of the existing entries. This ensures that functionality dependent on the time zone setting remains fully functional.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone</td>
<td>Each individual user’s time zone can be set. There are 75 time zones to select from. The one you select defines what daylight settings are used, so you must be careful in selecting the correct zone. The zone you select also needs to correspond exactly to your computer setting. All times are relative to the logged on user. For example, a meeting made at 09:00 GMT... by one user appears at 10:00 to users in +1:00 GMT.... The time zone of the server is set by the System Administrator. If Automatic Daylight Saving Time is checked on the server machine, it affects all users, even if they have not selected this option themselves in their time zone settings. If you need to add a new time zone to the list, this can be done via &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Decimal Point</td>
<td>The preferred way to view decimal point. For example, period [.] or comma [,].</td>
</tr>
<tr>
<td>Decimal Places</td>
<td>The preferred number of decimal places to be displayed. For example, 2. The maximum number of decimal places that can be set is 9.</td>
</tr>
<tr>
<td>Thousand Separator</td>
<td>The preferred way to view the thousand separator. For example, period [.] or comma [,].</td>
</tr>
<tr>
<td>Default Targets For High Priority Reminder Messages</td>
<td>The way in which the reminder is sent out for a high priority Communication, if the Send Reminder Message check box was checked.</td>
</tr>
<tr>
<td>Default Targets For Normal Priority Reminder Messages</td>
<td>The way in which the reminder is sent out for a normal priority Communication, if the Send Reminder Message check box has been checked.</td>
</tr>
<tr>
<td>Default Targets For Low Priority Reminder Messages</td>
<td>The way in which the reminder is sent out for a low priority Communication, if the Send Reminder Message check box was checked.</td>
</tr>
</tbody>
</table>

CSV input/output matrix

This table explains the formatting options when CSV or Excel CSV is selected as the export file format in Sage CRM.
<table>
<thead>
<tr>
<th>Export File Format</th>
<th>User Preferences Delimiter</th>
<th>Contains Extended Characters</th>
<th>Delimiter</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSV</td>
<td>Comma</td>
<td>No</td>
<td>Comma</td>
</tr>
<tr>
<td>CSV</td>
<td>Semicolon</td>
<td>No</td>
<td>Semicolon</td>
</tr>
<tr>
<td>CSV</td>
<td>Tab</td>
<td>No</td>
<td>Tab</td>
</tr>
<tr>
<td>CSV</td>
<td>Comma</td>
<td>Yes</td>
<td>Comma</td>
</tr>
<tr>
<td>CSV</td>
<td>Semicolon</td>
<td>Yes</td>
<td>Semicolon</td>
</tr>
<tr>
<td>CSV</td>
<td>Tab</td>
<td>Yes</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Comma</td>
<td>No</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Semicolon</td>
<td>No</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Tab</td>
<td>No</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Comma</td>
<td>Yes</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Semicolon</td>
<td>Yes</td>
<td>Tab</td>
</tr>
<tr>
<td>Excel CSV</td>
<td>Tab</td>
<td>Yes</td>
<td>Tab</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Encoding</th>
<th>Padding</th>
<th>Renders correctly in Excel</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTF-8</td>
<td>No</td>
<td>No</td>
<td>Test 01,00001,&quot;Test, 02&quot; &lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-8</td>
<td>No</td>
<td>No</td>
<td>Test 01;00001;Test, 02&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-8</td>
<td>No</td>
<td>No</td>
<td>Test 01&lt;Tab&gt;00001&lt;Tab&gt;Test, 02&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-8</td>
<td>No</td>
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<td>Test 01,00001,&quot;Test, 02&quot; &lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-8</td>
<td>No</td>
<td>No</td>
<td>Test 01;00001;Test, 02&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-8</td>
<td>No</td>
<td>No</td>
<td>Test 01&lt;Tab&gt;00001&lt;Tab&gt;Test, 02&lt;CR LF&gt;</td>
</tr>
</tbody>
</table>
Output

<table>
<thead>
<tr>
<th>Encoding</th>
<th>Padding</th>
<th>Renders correctly in Excel</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTF-16 LE</td>
<td>Yes</td>
<td>Yes</td>
<td>&quot;Test 01&quot;&lt;Tab&gt;=&quot;00001&quot;&lt;Tab&gt;=&quot;Test, 02&quot;&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-16 LE</td>
<td>Yes</td>
<td>Yes</td>
<td>&quot;Test 01&quot;&lt;Tab&gt;=&quot;00001&quot;&lt;Tab&gt;=&quot;Test, 02&quot;&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-16 LE</td>
<td>Yes</td>
<td>Yes</td>
<td>&quot;Test 01&quot;&lt;Tab&gt;=&quot;00001&quot;&lt;Tab&gt;=&quot;Test, 02&quot;&lt;CR LF&gt;</td>
</tr>
<tr>
<td>UTF-16 LE</td>
<td>Yes</td>
<td>Yes</td>
<td>&quot;Test 01&quot;&lt;Tab&gt;=&quot;00001&quot;&lt;Tab&gt;=&quot;Test, 02&quot;&lt;CR LF&gt;</td>
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<td>&quot;Test 01&quot;&lt;Tab&gt;=&quot;00001&quot;&lt;Tab&gt;=&quot;Test, 02&quot;&lt;CR LF&gt;</td>
</tr>
</tbody>
</table>

**Tip:** For Excel CSV, if a field contains <tab> or <CR LF> these characters are not present in the exported file.

**User Configuration Settings fields**

The table below explains the fields on the User Configuration Settings screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount of days to password expiring</td>
<td>Specifies the maximum Sage CRM user password age in days. When this period expires, the user must change their Sage CRM password. The default password age is 50 days.</td>
</tr>
<tr>
<td>Allow User Preferences</td>
<td>Specifies whether Sage CRM users are allowed to access &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account Lockout Threshold</td>
<td>Specifies the number of times a user is allowed to enter an incorrect password when logging on to Sage CRM. When this number is exceeded, the user’s account is locked out in Sage CRM. The system administrator can unlock the account or the user can wait until the account lockout period (if any) expires.</td>
</tr>
<tr>
<td>Account Lockout Duration (Mins)</td>
<td>The number of minutes a locked-out user has to wait before trying to log on to Sage CRM again.</td>
</tr>
<tr>
<td>User Inactivity Timeout (Mins)</td>
<td>The inactivity period (in minutes) after which a user is automatically logged out of Sage CRM. Sage CRM uses the value in this field only if it is less than the value in <strong>Idle Time-out (minutes)</strong> specified for the Sage CRM application pool in Microsoft Web Server (IIS). The default idle time-out value in IIS is 20 minutes.</td>
</tr>
<tr>
<td>Use IIS Auto Login</td>
<td><strong>Yes.</strong> Enables automatic login to Sage CRM for authenticated Windows users. Users are authenticated by Web Server (IIS) and don't need to enter Sage CRM credentials when accessing Sage CRM. <strong>No.</strong> Disables automatic login. For the IIS automatic login to work, ensure that:</td>
</tr>
<tr>
<td></td>
<td>1. The user names in Sage CRM and in Active Directory are identical. Once a user is authenticated via IIS using their Active Directory user name and password, that user is looked up in the Sage CRM user table. If the user is not found in that table, that user is denied access to Sage CRM.</td>
</tr>
<tr>
<td></td>
<td>2. You have enabled Windows Authentication and disabled Anonymous Authentication for the Sage CRM virtual directory in Web Server (IIS).</td>
</tr>
<tr>
<td></td>
<td>3. You have added users’ Active Directory domain to trusted sites.</td>
</tr>
<tr>
<td></td>
<td>The IIS Auto Login feature has been tested with Microsoft Internet Explorer only. However, this feature may also work with other web browsers.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Default Domain For IIS Login</td>
<td>Specifies the NetBIOS name of the Active Directory domain whose users are automatically authenticated when Use IIS Auto Login is set to Yes. Allows you to prevent unauthorized external access to Sage CRM. If you leave this field blank, Sage CRM users are matched to their Windows user accounts using their complete domain\user name combination. For example, a user called Susan Maye with Windows user account mayes in the domain sage, has a Sage CRM account name sage\mayes. If you have only one domain, enter the domain name in this field. For example, if sage is your only domain, enter sage in this field and the Sage CRM logon ID for Susan Maye is mayes.</td>
</tr>
<tr>
<td>Plugin Version</td>
<td>The path and name of the current Sage CRM Plugin file. The current Sage CRM Plugin resides on the Sage CRM server and is downloaded if the client-side value does not match the value specified in this field.</td>
</tr>
<tr>
<td>Outlook Plugin Version</td>
<td>Specifies the Classic Outlook Plugin version. Use this field to manually update the Outlook Plugin version after installing an Outlook Plugin patch.</td>
</tr>
</tbody>
</table>
| Outlook Integration Options   | • **Classic Outlook Integration.** Displays a button that lets the user install the Classic Outlook Plugin and use Classic Outlook Integration.  
  • **Lite Outlook Integration.** Displays a button that lets the user install the Lite Outlook Plugin and use Lite Outlook Integration. If Exchange Integration is enabled, the Lite Outlook plugin provides additional functionality to the Exchange Integration.  
  • **Both.** Displays both the Classic Outlook button and the Lite Outlook button on a 32-bit system. It displays only the Lite Outlook button on a 64-bit system. Only one plugin can be installed.  
  • **None.** Prevents the user installing the Classic Outlook Plugin or the Lite Outlook Plugin because no plugin buttons are displayed.                                                                                                                                                                                                                                                                                               |
| One Way Synchronization       | Specifies the direction in which data is synchronized between Outlook and Sage CRM in Classic Outlook Integration.  
  • **No.** Data is synchronized bidirectionally, from Sage CRM to Outlook and from Outlook to Sage CRM.  
  • **From Outlook to CRM only.** Data is synchronized from Outlook to Sage CRM only.  
  • **From CRM to Outlook only.** Data is synchronized from Sage CRM to Outlook only.  
  When you change this value, users must restart their Sage CRM session in Outlook and initiate synchronization for the change to take effect.                                                                                                                                                                                                                                                                                                       |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synchronize Outlook Deletions</td>
<td>Specifies whether to delete appointments, tasks, and contacts in Sage CRM when they're deleted in Outlook. The items are deleted in Sage CRM during Outlook synchronization.</td>
</tr>
</tbody>
</table>
|                                          | - **Yes.** Deletes appointments, tasks, and contacts in Sage CRM if the user has rights to delete them.  
- **No.** Leaves appointments, tasks, and contacts intact in Sage CRM.                                                                                                                                                                                                        |
| Manage CRM and Outlook Updates           | Specifies how to resolve data conflicts between Outlook and Sage CRM when bidirectional synchronization is enabled (One Way Synchronization is set to No). To view conflicts, use the View Conflict Log in Outlook.                                                                                                               |
|                                          | - **Outlook Updates Win.** The changes made to Outlook will appear in both Outlook and Sage CRM. This is the recommended option for organizations that use Outlook as their primary appointment scheduling tool. The default for new installations is Outlook Updates Win.                                                                 |
|                                          | - **Organizer Updates Win.** This applies to appointments only. This is the recommended option for organizations that mainly rely on Sage CRM for their customer interaction management and have a number of users who use Outlook to organize and update meetings.                                                                                     |
|                                          | When the appointment organizer (the person who created the appointment in Outlook) initiates synchronization, changes made in Outlook overwrite any conflicting data in Sage CRM.                                                                                            |
|                                          | When any other user initiates synchronization, changes made in Sage CRM overwrite any conflicting data in Outlook.                                                                                                                                                                                                                      |
|                                          | - **CRM Updates Win.** Changes made to Sage CRM appear in both Outlook and Sage CRM. This is the recommended option for organizations that use Sage CRM as their primary appointment scheduling tool.                                                                                                                  |
| Synchronize Outlook Contacts             | Enables or disables the synchronization of contacts between Outlook and Sage CRM.                                                                                                                                                                                                                                                        |
|                                          | - **Yes.** Enables the synchronization of contacts.  
- **No.** Disables the synchronization of contacts.                                                                                                                                                                                                                         |
| Synchronize Outlook Appointments         | Enables or disables the synchronization of appointments between Outlook and Sage CRM.                                                                                                                                                                                                                                                |
|                                          | - **Yes.** Enables the synchronization of appointments.  
- **No.** Disables the synchronization of appointments.                                                                                                                                                                                                                  |
### Security management

- **Introduction to security management**
- **Security profiles**
- **Territories**
- **Security policies**
- **Password policies**

### Introduction to security management

You can manage security access rights across the organization by setting up security profiles and territories. Users don't belong to either profiles or territories. Profiles and territories are set up to reflect the structure of your organization. Users are then assigned a profile and home territory depending on their position in the organization.

- **Security profile**: A profile is a way of grouping users when defining access rights to view, update, insert, and delete Sage CRM records. For example, you can create a profile called Sales with rights...
to view, update, and insert company, person, communication, and opportunity records and with view only rights to cases. You can assign this profile to all sales users. Any changes that you make to the profile automatically apply to all users assigned to it.

- **Territory**: You can divide user rights by territory. For example, you may want users in the Europe territory to view all opportunities within the USA territory, but not to be able to update them. Territories act as a silent filter over existing security profiles. For example, if a security profile doesn't include view rights to opportunities, a user with that profile can't see any opportunities, no matter what territory they belong to. Territories affect searching, reporting, and groups generation. To switch off the influence of territories on groups, click `<My Profile> | Administration | User Configuration` and set `Enable Security for Groups` to `No`.

- **Security policy**: You can set up additional security rights to handle complex inter-territory situations and exceptions. When settings on the Security Policies screen are enabled, additional options are available on the Security Profiles screen. Security policies act as logical ORs to existing security profile and territory settings.

### Security profiles

- Adding a new security profile
- Assigning a security profile to a user
- Deleting a security profile

### Adding a new security profile

When setting up profiles and territories, it's a good idea to add view rights into the territory one level above the territory of the majority of your users. For example, in the Sales Profile, which includes users with home territories of Germany, UK, and Ireland, you add view rights into companies and people in the Europe territory. Then, when the Sales Manager, whose home territory is Europe, creates a new company in the Europe territory, he can create tasks for his team against that company and they can view the task or company. When adding new companies and people into the stem, the manager’s team can carry out more effective deduplication by comparing against companies created in the territory above them.

1. Click `<My Profile> | Administration | Users | Security`.
2. Click Security Profiles. A list of existing profiles is displayed. An unrestricted profile is created for the System Administrator when Sage CRM is installed. If the unrestricted profile is changed or deleted, the System Administrator bypasses all security rights and has global access to the system.
3. Click New Profile.
4. Enter the name of the new profile in Description.
5. Click Save. By default, the new profile cannot access primary entities.
6. Click the new profile link to define the security profile’s access rights to primary entities. Alternatively, click **Edit all rights** to edit all existing profile rights at once.
7. Select the View, Edit, Insert, Delete check boxes as required. You can specify rights according to profile and territory. For example, a user assigned to a Sales profile could have rights to view, edit,
insert, and delete cases in their home territory of US East, but be restricted to viewing and editing cases in the territory of US West.

8. Click Save.

A user must have edit rights on an entity to add or edit address, phone and email, notes, and library records for that entity. For example, a user with view rights only on a company, cannot edit or add information in the Addresses or Phone and Email tabs of that company. Similarly, a user with view rights only on cases, cannot edit or add notes or library items on an existing case.

Assigning a security profile to a user

2. Click the profile hyperlink in the Security Profile table.
3. Click Move user into this profile.
4. Select the user and click Save.

Alternatively

1. Click <My Profile> | Administration | Users | Users.
2. Click the user hyperlink.
3. Click Edit and select the profile from Profile Name.
4. Click Save.

To get an overview of security rights currently applied to the user, click <My Profile> | Administration | Users. Click the user link and click the Security tab.

Deleting a security profile

2. Click Delete beside the profile you want to delete.
3. Click OK.

Territories

- Adding a new territory
- Assigning a territory to a user
- Adding records to a territory
- Editing a territory
- Deleting a territory
- Merging territories
• Moving a territory
• Rebalancing the territory tree

Adding a new territory

The *Worldwide* territory is the default, highest level territory and cannot be deleted. All new territories are subordinated to the Worldwide territory.

The standard capacity for a territory structure is 16 child territories on each territory, and five territory levels deep. A complex territory structure may require the expansion of the standard capacity. If you try to add more territories than the standard capacity, you’re prompted to rebalance the territory structure. Rebalancing updates the territory hierarchy and associated security rights, and allows you to continue adding territories. For more information, see Rebalancing the territory tree.

2. Click New Territory.
3. Select the parent territory from the list of the existing territories. This is the hierarchical parent of the new territory.
4. Enter the name of the territory in New Territory Name.
5. Click Save.

Assigning a territory to a user

When you assign a territory to a user, the user can use the access rights of their profile in that territory and in all territories subordinate to that territory.

1. Click *<My Profile>* | Administration | Users | Users.
2. Enter the user’s Last Name and click Find.
3. Click the user hyperlink.
4. Click Change and select a territory from Home Territory.
5. Click Save.

Adding records to a territory

A Territory field is displayed on the summary screen of each primary entity, on most filter boxes, and on list column headings. This field shows the user’s assigned home territory and all subordinated territories. When a user inserts a new record, Territory defaults to a territory called Default, which acts as a placeholder until the user selects a territory. If a user doesn’t select a territory, or doesn’t have insert rights into their own home territory, the system follows Territory rules to decide which territory to save the record in. These rules apply to territories when security policies are in use and also when security policies are not in use.
When a record is inserted in the context of ... and no Territory entry has been selected by the user, when the user saves the new record, the Territory field of the new record defaults to the territory of [1].

If the user does NOT have INSERT RIGHTS in the territory of [1], the Territory field of the new record defaults to the territory of [2].

If the user does NOT have INSERT RIGHTS in the territory of [2], the Territory field of the new record defaults to the territory of [3].

If the user does NOT have INSERT RIGHTS in the territory of [3], the Territory field of the new record will defaults to the territory of [4].

<table>
<thead>
<tr>
<th></th>
<th>[1]</th>
<th>[2]</th>
<th>[3]</th>
<th>[4]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company and Person</td>
<td>Company</td>
<td>Person</td>
<td>Assigned To (user’s Home Territory)</td>
<td>Created by (user’s Home Territory)</td>
</tr>
<tr>
<td>Person (only)</td>
<td>Person</td>
<td>Assigned To (user’s Home Territory)</td>
<td>Created by (user’s Home Territory)</td>
<td></td>
</tr>
<tr>
<td>Company (only)</td>
<td>Company</td>
<td>Assigned To (user’s Home Territory)</td>
<td>Created by (user’s Home Territory)</td>
<td></td>
</tr>
<tr>
<td>No Company and No Person</td>
<td>Assigned To (user’s Home Territory)</td>
<td>Created by (user’s Home Territory)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Assigned To</td>
<td>Created by (user’s Home Territory)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Editing a territory**

You can change the name of an existing territory.

1. Click **<My Profile> | Administration | Users | Security.**
2. Click **Edit Territory** and choose the territory you want to modify from the list of territories.
3. Enter the new name in **Modified Territory Name.**
4. Click **Save.**
Deleting a territory

You can delete a territory that's not involved in current transactions or does not contain sub-territories. You can't delete a territory that has records assigned to it, and you can't delete the Worldwide territory.

1. Click <My Profile> | Administration | Users | Security.
2. Click Edit Territory and choose the territory you want to delete.
3. Click Delete. The territory and its child territories are deleted.

Merging territories

You can merge territories, and the information and rights associated with those territories. You might want to do this to reflect changes in your organization. Before you merge territories, ensure there are no users logged on to Sage CRM, and that you've backed up the Sage CRM database.

1. Click <My Profile> | Administration | Users | Security.
2. Click Merge Territory.
3. Choose the source territory that you want to move and click Next.
4. Choose the target territory.
5. Select the checkbox to move users and user rights associated with the source territory into the target territory.
6. Click Next to proceed through the screens.
7. Click Continue.
8. Rebalance the territory tree. For more information, see Rebalancing the territory tree.

Moving a territory

Moving a territory to a new position in the tree structure can expand or restrict the rights of users associated with the territory. Before you move a territory, ensure there are no users logged on to Sage CRM, and that you've backed up the Sage CRM database.

1. Click <My Profile> | Administration | Users | Security.
2. Click Move Territory.
3. Choose the source territory that you want to move and click Next.
4. Choose the new parent for the territory.
5. Click Next to proceed through the screens.
6. Click Continue.
7. Rebalance the territory tree structure. For more information, see Rebalancing the territory tree.
Rebalancing the territory tree

When you move or merge territories, or need to add more territories than the standard capacity, you must rebalance the territory tree to update the territory hierarchy and associated security rights.

Warning: You cannot undo rebalancing.

Before rebalancing, back up the Sage CRM database and ensure all users are logged off Sage CRM. Inform users when rebalancing will occur and ask them to remain logged off for the few minutes that rebalancing takes. To check if all users are logged off, open the Current Activity tab. For more information, see Viewing user activity for all users. You can manually force users to log off. For more information, see Locking the system.

1. Click <My Profile> | Administration | Users | Security.
2. Click Rebalance.
3. Click Next. A message is displayed when the rebalancing process has completed.
4. Click Continue. You can now add new territories from the New Territory page.

Security policies

- Working with cross territory situations
- Allowing absolute territories in profiles
- Using sibling territories
- Using a parent territory
- Allowing direct rights in territories

Working with cross territory situations

You can enable security policies to extend profile rights across territories. For example, to allow a user assign opportunities from their own territory to a user in a different territory.

1. Click <My Profile> | Administration | Users | Security.
2. Click Security Policies and click Change.
3. Set Use CreatedBy, AssignedTo, and Team special territories to Yes and click Save.
5. Choose Assigned To from Profile rights for.
6. Click Add Profile to this territory.
7. Select the profile and click Save.
8. Click the profile link. You can't select Insert rights in the Assigned To territory because it's not a true territory. The record must already exist for users to have special rights outside their own territory.
9. Select View and Edit in Assigned To | Opportunity and click Save. All users associated with the Sales profile can now view and edit opportunities in their home territory or child territories and any opportunities assigned to them, unless the opportunity has a company or person assigned to it. If the opportunity has a company or person assigned to it, the user must also have at least view rights on the company or person to be able to see the opportunity.
To edit the Sales user’s Home Territory rights and Assigned To rights, click the Sales profile link. Follow these steps to set up rights where the user’s Primary Team matches the team on the entity, or where the user matches the Created By field on the entity.

Allowing absolute territories in profiles

You can enable security policies to extend existing security profile and territory settings. The following steps give users associated with the Operations profile view only rights to opportunities in Europe.

1. Click <My Profile> | Administration | Users | Security.
2. Click Security Policies and click Edit.
3. Set Allow absolute territories in profiles to Yes and click Save.
5. Select Europe from Profile rights for and click Add Profile to this territory.
6. Select the Operations profile and click Save.
7. Click the Operations profile link. You can now edit the rights for the Operations profile.
9. Click Save. All users associated with the Operations profile can now view opportunities in Europe and child territories. To edit the Operations User’s Home Territory rights and Assigned To rights, click the Operations profile link.

Using sibling territories

You can set up rights in sibling territories. For example, you can set up all users associated with the Sales profile, whose Home Territory is at the lowest level within Europe (Germany, Benelux, UK, or Ireland) to view opportunities at the same level within the territory hierarchy.

1. Click <My Profile> | Administration | Users | Security.
2. Click Security Policies and click Edit.
3. Set Use the user’s sibling territories to Yes and click Save.
5. Select User’s sibling territories from Profile rights for. A list of profiles associated with user’s sibling territories is displayed.
6. Click Add Profile to this territory. This is not a true territory, just a means of displaying access rights to the administrator.
7. Select the Sales profile and click Save.
8. Click the Sales profile link and select View in User’s sibling territories | Opportunity.
9. Click Save. Users associated with the Sales profile, who have Germany, Benelux, UK, or Ireland as their Home Territories, can now view opportunities in any of these territories.

Using a parent territory

You can extend the rights of users associated with a profile to view opportunities in the parent territory. For example, all users associated with the Sales profile and whose Home Territory is at the lowest level within Europe (Germany, Benelux, UK, or Ireland) could view opportunities in Europe.

1. Click <My Profile> | Administration | Users | Security.
2. Click Security Policies and click Edit.
3. Set Use the user's parent territory to Yes and click Save.
5. Select User's parent territory from Profile rights for. A list of profiles associated with user's sibling territories is displayed.
6. Click Add Profile to this territory. This is not a true territory, just a means of displaying access rights to the administrator.
7. Select the Sales profile and click Save.
8. Click the Sales profile link and select View in User's parent territory | Opportunity.
9. Click Save.

Allowing direct rights in territories

You can set up a specific right for a user that extend beyond the rights of the territory to which the user is assigned. The following steps set up delete rights on opportunities for one user.

1. Click <My Profile> | Administration | Users | Security.
2. Click Security Policies and click Change.
3. Set Allow users direct rights in territories to Yes and click Save.
5. Select the territory in which these rights should be applied from User rights for.
6. Click Add user, select the manager, and click Save.
7. Click the manager name link and select Delete in Opportunity.
8. Click Save. Mike Weiss has the same rights as users associated with the Sales profile. In addition, he has rights to delete opportunities in Europe and child territories. Since these rights are specific to an individual user, you can also edit them in <My Profile> | Administration | Users.

Password policies

You can set strength tests on password security, which are invoked whenever a user changes their password. When the user next changes their password, a message is displayed if the password does not
meet the strength tests set up in Password Security Options.

1. Click <My Profile> | Administration | Users | Security.
2. Click Password Policies.
3. Choose the Password Security Profile you want to edit.
   - **Administrators**: Applies to all System Administrator users.
   - **Info Managers**: Applies to all Info Manager users.
   - **Ordinary Users**: Applies to all users with no administrator rights.
   
   **Tip**: To set user profiles, click <My Profile> | Administration | Users | Users | User Details and choose a value in Administration.

4. Make the changes to the Password Security Options.
5. Click Save.

### Password Security Options

The table below explains the fields on the Password Security Options page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Length Of Password</td>
<td>Sets the minimum password length users are required to enter for their login password. All other Password Security Options are disabled if this field is set to zero. The maximum password length is 20.</td>
</tr>
<tr>
<td>Require Complex Password</td>
<td>This requires that the password contains a character from at least three character sets. The character sets are uppercase, lowercase, numbers, and other characters. The first character of the password can only be either a letter or a number with or without this setting enabled.</td>
</tr>
<tr>
<td>Check User Name</td>
<td>Checks that the User Name (Logon ID) and Password are not identical.</td>
</tr>
<tr>
<td>Strong User Name</td>
<td>This checks that the password does not match the reverse of the user name, or the user name with common substitutions. If the DICTIONARY.TXT file exists, the password is checked against words in the dictionary, the reverse of words in the dictionary, and words in the dictionary with common substitutions. The DICTIONARY.TXT file is normally stored in the WWWROOT subdirectory of the Sage CRM install.</td>
</tr>
</tbody>
</table>
Teams

- Creating a new team
- Assigning a user to a team
- Setting user access to Team CRM
- Examples of using teams
- Deleting a team
- Team fields

Creating a new team

A team is a group of users who perform similar roles. In a small organization, all Sales Department users might be part of the Sales Team. In a larger organization, there may be Telesales, Direct Sales, and Field Sales teams.

1. Click <My Profile> | Administration | Users | Teams.
2. Click New and complete the Team fields.
3. Click Save.

Assigning a user to a team

1. Click <My Profile> | Administration | Users | Users.
2. Enter the user’s Last Name and click Find.
3. Click the user hyperlink.
4. Click Change.
5. Choose the team from Primary Team.
6. Choose additional teams that the user can view from Display Team. For example, the Sales Manager may require access to the Direct Sales and Telesales teams.
7. Click Save.

Setting user access to Team CRM

1. Click <My Profile> | Administration | Users | Users.
2. Enter the user’s Last Name and click Find.
3. Click the user hyperlink.
4. Click Change.
5. Select an option from Team List in the Security panel.
   - **All Teams** gives the user access to Team CRM and all team queues.
   - **User's Teams** gives the user access to Team CRM, their own team queues (Primary Team) and all team queues selected from the Display Team list.
   - **None** means Team CRM is not made available to the user.
6. Click Save.

**Examples of using teams**

You can make each user a member of one team and give the user rights to view multiple teams. Communications, opportunities, leads, and cases can be tracked by individual user and by team. You can initially assign communications to a team and later reassign them to an individual.

- **Tracking communications by team.** John Finch is a user in your organization assigned to the Telesales team. Every time John Finch creates a new Communication, the Team field defaults to Telesales. The telesales manager can use Team CRM to view all the activities for John Finch and other members of the Telesales team for the day.
- **Creating tasks for teams.** The customer service manager in your organization can use groups to set up an outbound telephone campaign to the active customer base. By leaving the User field blank, but filling in the Team field in the task details, the calls are scheduled for the whole team.
- **Assigning an opportunity to a team.** Sales opportunities can be assigned to teams. This means that the overall performance of, for example, the Direct Sales vs. the Business Partner team can be compared on a deal-by-deal basis. By tracking team performance on the Opportunity and Communication level, additional information can be extracted to improve future sales performance.
- **Reassigning unresolved cases.** Your company is in the insurance business. Cases are used to handle automobile, home, life, and travel insurance claims. Your customer service teams are set up by type of insurance. The travel claims team is overloaded after the recent holiday season, however the home insurance team has spare resources. Following a team leader meeting, the travel claims team leader clicks **<My Profile>** | **Team CRM** | **Cases** and reassigns half of the unresolved claims to the three available claims handlers in the home insurance team by changing the user name in **Assigned To**.

**Deleting a team**

1. Click **<My Profile>** | **Administration** | **Users** | **Teams**.
2. Enter a **Team Description** and click **Find**.
3. Click the team you want to delete.
4. Click **Delete** and then click **Confirm Delete**. The Team is deleted. Any opportunities, leads, cases, or communications linked to a deleted team remain, but the **Team** field is blank. You can't select the team from the context area of the screen in Team CRM.

## Team fields

The table below explains the standard fields on the Team page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Description</td>
<td>Team Name. For example, Direct Sales. If you change the name of a team after you've created and saved it, you must manually change the translated caption. This caption is displayed in team list drop-down fields. Click `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Broker Rule</td>
<td>The Broker Rule is used when creating a task for a group. If you pick a team and don't explicitly pick a broker rule, the system uses the broker rule from the team if there is one. If there is none, the default is Queue. For more information, see Campaign Management in the <strong>User Guide</strong>. The Broker Rules are explained in Scheduling a Call Back.</td>
</tr>
<tr>
<td>Owner</td>
<td>Not in use</td>
</tr>
</tbody>
</table>

## User activity

- Viewing user activity for all users
- Viewing user activity for an individual user
- Enabling locked out users to log in
- Archiving user activity records
- Running user activity reports

### Viewing user activity for all users

1. Click `<My Profile> | Administration | Users | User Activity`.  
2. To see information for a specific user, click the **Find** icon beside **User** in the Filter panel and choose the user's name. Click **Filter** to view the activity records specific to the selected user.
3. Click a tab to view information.
   - **All User Activity**: Summary information about all user activity. Enter a filter period to display activity records with a log on and log off within that period. If a record has a log on time in the filter period for log ons but the log off time is outside the filter period for log offs, the activity record is not displayed.
     You can further filter user activity records according to how the user logged off and the access method (such as browser type) used.
   - **Currently Logged In Users**: A list of currently logged on users. This tab is useful when you need to ensure that all users are logged out of the system, for example when you are rebalancing the territory tree. For more information, see Rebalancing the territory tree. In such situations, all users except the administrator user should be listed in **Inactive Users** and only the administrator should appear in **Currently Logged In Users**.
   - **Inactive Users**: A list of historical user activity records.
   - **User Summary**: Summary information about user sessions.

**Viewing user activity for an individual user**

1. Click `<My Profile> | Administration | Users | Users`.
2. Enter the user’s Last Name and click Find.
3. Click the user hyperlink.
4. Click the **User Activity History** tab. From here, you can periodically archive the user’s activity history. You can also see:
   - User login and logout time and date.
   - Session duration.
   - Logout method (manual or by automatic timeout).
   - System access method (browser and version).
5. Enter a filter period to display activity records with a log on and log off within that period. If a record has a log on time in the filter period for log ons but the log off time is outside the filter period for log offs, the activity record is not displayed. You can further filter user activity records according to how the user logged off and the access method (such as browser type) used.

**Enabling locked out users to log in**

When setting up user configuration, you can specify the number of times a user can try incorrectly to log on before being locked out of the system. If requested, you can enable the user to log on again.

1. Click `<My Profile> | Administration | Users | Users`.
2. Enter the locked out user’s Last Name and click Find.
3. Click the user hyperlink.
4. Click **Unlock User**. The button disappears, indicating that the user can now try to log on again.
Archiving user activity records

To avoid storing a large number of user activity records, you can archive records of a specific age. Archived files are removed from your All User Activity page and filed to a CSV document, which is stored with the system log files.

1. Click <My Profile> | Administration | Users | User Activity.
2. Click Archive To File.
3. Select the age at which records are to be archived from Records Older Than. You can select One Month, Three Months, Six Months or 12 Months. A message is displayed to tell you how many records will be archived.
4. Click Archive To File. You are returned to the All User Activity page. A message is displayed indicating how many records have been archived and the name of the file to which they have been archived.

Running user activity reports

You can run a set of standard user activity reports. You can also create new reports which use the User Activity view.

The Administrator Reports category is available to System Administrators only. To allow Info Managers access this category, change the properties of the report category in Advanced Customization.

1. Click Reports | Administrator Reports.
2. Click the report you want to run.
3. Set the report display options and search criteria.
4. Click Run. The report output is displayed in a new browser window.

Active Directory users

- Importing users
- Reimporting users
- Active Directory Parameters fields
- Import Users fields
- Active Directory mapping
Importing users

User Requirement: System Administrator

You can add users stored in Microsoft Active Directory to Sage CRM in a batch process using the Import Users wizard.

1. Click <My Profile> | Administration | Users | Import Users.
2. Complete the Active Directory Parameters fields and click Connect. When you've successfully connected to the Lightweight Directory Access Protocol (LDAP) server, the Active Directory List is populated.
3. Select the node containing users from the Active Directory List and click Expand Selected Node. Drill down to select a single or organizational group of users.
4. Click Continue.
5. Select the users to import by filtering or changing the selections in the list of users and click Continue.
6. Complete the Import Users fields and click Continue.
7. Click View Log File to open or save the log. You can also access the log file from <My Profile> | Administration | System | System Logs, and from ..\Program Files\Sage\CRM\[Installname]\Logs.
8. Click Continue.

Reimporting users

You can reimport users following changes to their details in Active Directory.

1. Ensure Remove Existing CRM Users From The List is not selected in the Import Users wizard.
2. Select Overwrite Existing User Details and complete the import. The users are re-imported. Only data in the mapped fields is overwritten. For more information, see Active Directory mapping. All other Sage CRM properties, including the password, remain unchanged.

Active Directory Parameters fields

The table below describes the fields on the Active Directory Parameters panel.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDAP Server Name</td>
<td>Server name or server IP address of the server where Active Directory is configured.</td>
</tr>
<tr>
<td>LDAP Server Port</td>
<td>Port number. If this field is left blank, then 389 is the default port used.</td>
</tr>
<tr>
<td>Active Directory User ID</td>
<td>This is a logon ID with access to navigate the Active Directory tree. For example, testID@testdomain or testdomain\testid. The logon is the UserPrincipalName attribute taken from the Active Directory user's properties.</td>
</tr>
<tr>
<td>Active Directory User Password</td>
<td>Password for the logon ID specified in the Active Directory User ID field.</td>
</tr>
</tbody>
</table>

### Import Users fields

The table below describes the fields and options on the Import Users, Step 2 of 4 page.

<table>
<thead>
<tr>
<th>Field or Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Contains search on the user's last name.</td>
</tr>
<tr>
<td>Email</td>
<td>Contains search on the email address.</td>
</tr>
<tr>
<td>Remove Existing CRM Users From The List</td>
<td>Selected by default. Remove selection if you want to view and select users already in Sage CRM.</td>
</tr>
<tr>
<td>User List</td>
<td>List of users from the data source chosen in step 1. This list can be modified by using the Filter fields, the Select / Deselect buttons, and the check boxes next to individual users. The Select/Deselect buttons apply to the current filter. Please also note that the filtering in Step 2 applies to the data source selected in Step 1 (it is not re-querying Active Directory each time).</td>
</tr>
<tr>
<td>Field or Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Licensing                    | Shows the number of seats available and number of users selected. In a Named User install, an error message is displayed if the number of licenses is exceeded. "Seats available" refers to the number of licenses minus the number of current active (does not include resources) users. If concurrent licensing is being used, this panel gives you the option to import users as either named or concurrent licenses. It will show the remaining seats available (total licenses minus named users). The total number of users currently selected to import includes the number of existing Sage CRM users in the system who are also in Active Directory. To clear this number down to zero:  
  - Deselect Remove Existing CRM Users From The List.  
  - Click Find (so that all users are displayed in the list).  
  - Click Deselect All.                                                                                                                                 |
| Generate Random Password     | Random passwords are generated which follow the rules set in <My Profile> | Administration | Users | Security | Password Policies. Please see Password policies for more information. This setting is not available if IIS Auto Login is enabled (from My Profile> | Administration | Users | User Configuration).                                                                                                                                 |
| Include Generated Password In Welcome Email | Password will be included in the welcome email. If this is not selected, the System Administrator must notify users separately of their password. If the Generate Random Password option has been selected but the welcome email option is not selected, the System Administrator must reset the password in Sage CRM and notify users separately. This setting is not available if IIS Auto Login is enabled (from <My Profile> | Administration | Users | User Configuration).                                                                                                                                 |
| Use The Same Password For All Users | Sets the same password for all users in the import.                                                                                                                                                  |
| Password                     | Enter a common password for all users in the import. The password must conform to the rules set in <My Profile> | Administration | Users | Security | Password Policies.                                                                                                                                                  |
| Overwrite Existing User Details | Data in the mapped fields is overwritten. Please see Active Directory mapping for a list of the mapped fields. All other Sage CRM properties, including the password, remain unchanged.                                                                                                                                 |
| Select User Template         | Select a user template. New templates can be added in <My Profile> | Administration | Users | User Templates. Please see User templates for more information.                                                                                                                                 |
| Resource                     | Read-only. All users are imported with the Resource field set to False.                                                                                                                                  |
**Field or Option**  
Send Welcome Email To New Users  

**Description**  
Select to send a welcome email to users. A mail server must be available and configured in **<My Profile> | Administration | Email And Documents | Email Configuration**. Please see Email/SMS settings for more information. If you are using Email Manager, the welcome email does not get filed by the mail manager filing service.

**Select Email Template**  

A standard template for the welcome email is supplied. This includes "tokens" for the Sage CRM user name logon ID, password, and a link to access the system. The tokens are specially formatted so that they cannot be reused anywhere else in the system (for example, document templates). The tokens are:

- **%CRMUserName%** - The user display name from Step 2 of the wizard, for example, Maye, Susan.
- **%CRMLogin%** - The Sage CRM user name logon ID, for example, mayes.
- **%CRMPassword%** - The Sage CRM password. Displays "Password not available" if Include Generated Password In Welcome Email is deselected in Step 3, or if you have selected Use The Same Password For All Users.
- **%CRMLink%** - The URL to access Sage CRM.

The template can be modified in **<My Profile> | Administration | Email And Documents | Email Templates**. Please see Setting up email templates for more information.

---

**Active Directory mapping**

The following table shows the mapping of Active Directory attributes to Sage CRM fields.

<table>
<thead>
<tr>
<th>AD Attribute</th>
<th>Sage CRM Field</th>
<th>Required for Import</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>sAMAccountName</td>
<td>user_logon</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>SN</td>
<td>user_lastname</td>
<td>Yes</td>
<td>If the source attribute is empty, then this is populated with the userPrincipalName.</td>
</tr>
<tr>
<td>givenName</td>
<td>user_firstname</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>mail</td>
<td>user_emailaddress</td>
<td>No</td>
<td>If the source attribute is empty, then this is populated with the userPrincipalName.</td>
</tr>
<tr>
<td>userPrincipalName</td>
<td></td>
<td></td>
<td>This attribute supports the scenarios where source fields required for the import are empty.</td>
</tr>
</tbody>
</table>
When an import is repeated, and the option to overwrite existing Sage CRM user data is selected, only data in the mapped fields is overwritten.

User templates

- Changing the default user template
- Creating a user template
- Setting up a new user based on a template
- Changing template details
- Changing template user preferences
- Changing security profile rights for a user template
- Deleting a user template

Changing the default user template

New Sage CRM installs contain a default user template where you can define baseline settings for all new users. This enables you to define a set of common characteristics that can be applied to new users, such as the default language, common security access rights, and user preference settings. You can't delete the default user template.

When you’ve defined the default user template, you can create other user templates based on the default template. The number of user templates you can create is not limited by your number of user licenses.

1. Click <My Profile> | Administration | Users | User Templates.
2. Enter Default User Template in Template Name and click Find.
3. Click the Default User Template link.
4. Click the Template Details tab, and then click Change.
5. Make your changes and click Save.
6. Edit and save the template information in the User Preferences and Security Profile tabs.

Creating a user template

1. Click <My Profile> | Administration | Users | User Templates.
2. Click New.
3. Complete the Template panel fields and click Continue.
4. Complete the More User Detail panel fields and the Security Profile fields.
5. Click Continue.
6. Complete the User Preferences fields and click Save. To revert to the user preferences in the default user template, click Set To System Defaults.

**Template panel fields**

The table below explains the standard fields on the Template panel.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>The name of the new template. For example, Sales User.</td>
</tr>
<tr>
<td>Based on Template</td>
<td>The existing template on which the new template is based.</td>
</tr>
<tr>
<td>Primary Team</td>
<td>The default team that’s displayed when the user clicks Team CRM.</td>
</tr>
<tr>
<td>Home Territory</td>
<td>The user’s security territory. For example, USA.</td>
</tr>
</tbody>
</table>

**More User Detail panel fields**

The table below explains the fields on the More User Details panel.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>Preferred language. Each user sees the same underlying data in the database, however the buttons, field names, and captions throughout the application appear in the user’s selected language.</td>
</tr>
<tr>
<td>User SMS Notification</td>
<td>If SMS features are used, setting this to True allows a user to be sent an SMS notification message to their mobile phone when communications are created for them. The Mobile Email Address field must be correctly filled in for this to work.</td>
</tr>
<tr>
<td>Display Team</td>
<td>The team queues that the user can view from Team CRM.</td>
</tr>
<tr>
<td>Forecasting - Reports To</td>
<td>Sales manager or direct report, who can access the selected user’s forecast. For more information, see Sales Forecasting in the User Guide.</td>
</tr>
<tr>
<td>Forecast - Currency</td>
<td>The currency in which the forecast is calculated. If the user enters a forecast value on the Opportunity in a different currency, it’s converted to the Forecast Currency set here. For more information, see Sales Forecasting in the User Guide.</td>
</tr>
</tbody>
</table>

**Setting up a new user based on a template**

If you’ve already set up user templates, creating new users based on the predefined templates is easy.
1. Click <My Profile> | Administration | Users | New User.
2. Complete the fields on the page. For more information, see User fields.
3. Select the template you created from the User Template drop-down list. This completes the Administration, Primary Team and Home Territory fields automatically, according to the template settings.
4. Click Continue.
   - Click Save to go back to the Users Find page. This misses out Steps 2 and 3 of the user setup. If you're confident that all of the default settings from the selected user template are applicable to this new user, then there's no need to go through steps 2 and 3 of the new user setup.
   - Click Save & New to save the new user and create another new user.
   - Click Previous to return to the New User Setup, Step 1 of 3 page.
   - The New User Setup, Step 2 of 3 page is displayed. All the settings on this page are defaults from the user template you selected in the previous step.
5. Review the default settings, and adjust them for this specific user. You can also add user specific details, such as title, department, phone, fax, and pager numbers. Refer to More User Details fields and Security Profile fields for an explanation of the fields.
6. Click Continue. The New User Setup, Step 3 of 3 page is displayed. All the settings on this page are defaults from the user template you selected in Step 1 of the new user setup.
7. Review the default settings, and adjust them for this specific user if you need to. Refer to User Preferences fields for more information on the fields.
8. Click Save.
   - Click Save & New to save the new user and add another new user. This is useful if you need to create several new users sequentially and you don't need to review the User Preferences in Step 3.
   - Click Set To System Defaults to reset the user preferences to the preferences defined in the default user template.
   - Click Previous to return to the New User Setup, Step 2 of 3 page.

Changing template details

1. Click <My Profile> | Administration | Users | User Templates.
2. Enter the Template Name.
3. Click Find.
4. Click the template you want to edit, and click Change.
5. Make the changes to the Template Details page.
6. Click Save. The Template Details page is displayed with the updated information.
### Changing template user preferences

1. Click **<My Profile> | Administration | Users | User Templates**.
2. Type in the **Template Name**.
3. Click **Find**.
4. Click the template you want to make changes to, and click the **User Preferences** tab.
5. Make the changes to the User Preferences.
6. Click **Save**.

### Changing security profile rights for a user template

You can view the security profile currently associated with a template from the Security Profile tab.

Change the profile currently associated with a template using **Profile Name** in the **Template Details** tab. For more information, see Changing template details.

1. Click **<My Profile> | Administration | Users | User Templates**.
2. Enter a template name and click **Find**.
3. Click the template you want to edit, and click the **Security Profile** tab.
4. Click the profile the template is currently associated with. The Security Profiles page for the selected profile is displayed.
5. Make the changes to the **Profile Rights**. For information on security profiles and territories, see Adding a new security profile.
6. Click **Save**. The Security Profiles page is displayed.

### Deleting a user template

1. Click **<My Profile> | Administration | Users | User Templates**. The Find screen is displayed.
2. Enter the template name and click **Find**.
3. Click the template you want to delete. The Template Details page is displayed.
4. Click **Delete**, then **Confirm Delete**. You cannot delete the default user template.
Standard classic dashboards

- Creating a standard classic dashboard
- Customizing the classic company dashboard

Creating a standard classic dashboard

The classic dashboard is a legacy feature that's available for upgrade customers only.

You can set up a standard classic dashboard, which a user can access from My CRM | Dashboard.

1. Click <My Profile> | Administration | Users | Standard Classic Dashboards. A list of existing classic dashboards is displayed.
2. Click Standard Classic Dashboard to create a new standard classic dashboard. The Dashboard Details page is displayed.
3. Enter the name of the new dashboard, and fill in the fields:
   - Display Contents From - select from a list of existing standard classic dashboards to base the new dashboard on.
   - Restrict To Team - select from a list of teams, if you want this classic dashboard to only be available to, for example, the Direct Sales team.
   - Set As Team Default - select if you want this classic dashboard to be the default for the team.
4. Use the Filter By drop-down list to navigate to different categories of classic dashboard content.
5. Click Add beside the content you want to add.
   - The content is added into the Narrow or Wide column lists.
   - Use the up and down arrows to change the order of the classic dashboard content.
   - To remove classic dashboard content, highlight the content in the column listing, then click the minus button. Alternatively, you can navigate to the filtered list on the left-hand side of the page, where the content is stored, and click the Remove arrow.
   - Click Clear to clear all the dashboard content.
6. When you have finished adding the standard classic dashboard content, click Save. The standard classic dashboards list is displayed, showing the new dashboard you have created.

When a user logs on and selects the Dashboard tab for the first time, and chooses the Classic Dashboard option, the standard classic dashboard is displayed.

The user can then decide to set this as their default classic dashboard to display every time they click the Dashboard tab, or they can set up another dashboard, and set this as their default dashboard. If multiple dashboards already exist, but no default has been set, then the system displays the first dashboard in the drop-down list to the user.
Customizing the classic company dashboard

The classic dashboard is a legacy feature that's available for upgrade customers only.

The Company Dashboard tab can be used to display a management overview of the customer account status.

When you defines a standard Classic Company Dashboard, it is displayed when the user first clicks the Dashboard tab in the context of a company. The user can then customize the Company Dashboard to suit their needs.

1. Click <My Profile> | Administration | Users | Standard Classic Dashboards. A list of existing dashboards is displayed.
2. Click Company Dashboard to add a new company dashboard.
3. Click Continue.
4. Use the Filter By drop-down list to navigate to different categories of dashboard content.
5. Click Add beside the content you want to add.
6. When you’ve finished adding the company dashboard content, click Save. The standard dashboards list is displayed.
System customization

- Translations and help
- Component Manager
- Entities
- Fields
- Screens
- Lists
- Tabs
- Views
- External access
- Summary reports
- Web leads
- Key attribute profiling
- Workflow
- Quick notifications and escalations
Translations and help

- Changing the user language
- Modifying language translations
- Adding new languages
- Translation Details fields
- Managing help

Changing the user language

You can support the use of different languages on the same system.

The language used in the screens is defined in each user profile. To change the language the user works in:

1. Click `<My Profile> | Administration | Users | Users`.
2. Enter the user’s Last Name and click Find.
3. Click the user link, and click Change.
4. Choose the required language from Language.
5. Click Save.

Modifying language translations

Translations let you adapt standard field names and selection lists to suit your company terminology. There are three ways to maintain language translations. Decide what you want to achieve and use the best method to suit your objective.

- Inline translation is useful when renaming field names in one or multiple languages.
- Field customization is useful when you’re changing the translations of selection lists in one language.
- Translations list is useful when you’re adding translations for selection lists in multiple languages.

**Warning:** You should not add or delete translation records on the Translations page as doing so has far-reaching effects on your system. You should use this functionality only if you’ve completed a Developer training course.

For more information about changing the text in coaching captions, see Customizing onscreen coaching.
**Inline translation**

Inline translation lets you rename fields in one or multiple languages. To enable inline translation mode:

1. Click `<My Profile> | Administration | Customization | Translations.`
2. Select **Inline Translation Mode.** All field names that can be translated in this mode are displayed with an underscore and asterisk after the name.
3. Click the asterisk next to the caption field. The Translation page is displayed in a new window. **Caption Context** helps translators get as close as possible to the original intended meaning of the word.
4. Enter the new translations and click **Save.**
5. Click `<My Profile> | Administration | Customization | Translations.`
6. Unselect **Inline Translation Mode.**

**Field customization**

Field customization lets you change the translations of selection lists in one language.

1. Click `<My Profile> | Administration | Customization | Primary Entities | Communication | Fields.`
2. Click **Selection** in the **Field Type** column of the field you want to change.
3. Choose the selection.
4. Enter the new translation in **Change Translation.** The language defaults to the language of the active user.
5. Click **Update** and click **Save.**
6. To view the translation, create a new task and click **Action.**

**Translations list**

Translations list lets you add translations for selection lists in multiple languages. This example adds French, German, and Spanish translations

1. Click `<My Profile> | Administration | Customization | Translations.`
2. Enter the selection list name in the current language field and click **Find.** For example, to search for the Pending selection list item when the language of the current user is US English, type **Pending** in **US Translation.**
3. Click **Find.**
4. Click the relevant selection list item. For example to add translations for the selection list item Pending in the communications Status field, click **Pending** for the Comm_Status caption family.
5. Click **Change.**
6. Enter the translations.
7. Click **Save.** The translations take immediate effect.
Adding new languages

A standard installation supports seven concurrent languages. You can add new languages that are included in the User Language selection list and the Translation Details page.

1. Click <My Profile> | Administration | Customization | Translations.
2. Click Add New Language.
3. Enter the details of the new language (ISO codes are preferred for the Language Code).
4. Click Save.

Translation Details fields

**Warning:** You should not add or delete translation records on the Translations page as doing so has far-reaching effects on your system. You should use this functionality only if you’ve completed a Developer training course.

The following table explains the standard fields on the Translation Details page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption Code</td>
<td>The system code that is stored—not what the user sees on the screen. For example, LetterOut. This stays the same regardless of the language translation. It is set up when the selection choices are defined. For more information, see Fields.</td>
</tr>
<tr>
<td>Caption Family</td>
<td>The Caption Family groups the code. For example, LetterOut, LetterIn, PhoneOut, PhoneIn all belong to the Caption Family Comm_Action.</td>
</tr>
<tr>
<td>Caption Family Type</td>
<td>The Type of Caption Family. For example, for a selection list the family type is Choices.</td>
</tr>
<tr>
<td>Caption Order</td>
<td>The order the caption appears in the selection list.</td>
</tr>
<tr>
<td>Caption Context</td>
<td>Can be used to add free text to a custom caption to give it more meaning. This provides context information for translators less familiar with the system.</td>
</tr>
<tr>
<td>UK Translation</td>
<td>The UK English translation for the Caption Code.</td>
</tr>
</tbody>
</table>
Managing help

- Installing help files locally
- Switching between local and web help
- Customizing help links
- Adding field-level help
- Customizing onscreen coaching

Installing help files locally

By default, help files are not installed together with Sage CRM. When a user clicks the Help button, Sage CRM displays help files hosted on dedicated web servers. To access these help files, client computers must have access to the Internet. You can change this default behavior at any time by installing help files locally on your Sage CRM server.

For example, you need to do so if:

- Client computers in your environment have limited or no access to the Internet.
- You want to customize the Sage CRM help files.

If your environment includes multiple Sage CRM servers, you need to install help files only on one of them. Other Sage CRM servers will automatically get access to the help files once they are installed.

After installing help files locally, you can always switch back to using help hosted on web servers.

To install help files:

1. Download the Sage CRM 2017 R1 Help Setup file.
   
   The Help Setup file is available on the Sage CRM Partner Community. The file name has the following format:

   **SageCRM_<VersionNumber>_HelpSetup.exe**

   where `<VersionNumber>` is the Sage CRM version the setup is for.

2. Copy the Help Setup file to the Sage CRM server on which you want to install help.
3. Run the file and complete the Setup Wizard. You will be prompted to enter administrative credentials for the Sage CRM database.

Sage CRM help files are installed to the following locations:

<table>
<thead>
<tr>
<th>Help</th>
<th>Location on a Sage CRM server</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Help</td>
<td>• On a 32-bit system: %ProgramFiles%\Sage\CRM&lt;InstallName&gt;\WWWRoot\Help&lt;Language&gt;\Main Menu</td>
</tr>
<tr>
<td></td>
<td>• On a 64-bit system: %ProgramFiles(x86)%\Sage\CRM\WWWRoot\Help&lt;Language&gt;\Main Menu</td>
</tr>
<tr>
<td>System Administrator Help</td>
<td>• On a 32-bit system: %ProgramFiles%\Sage\CRM\WWWRoot\Help&lt;Language&gt;\Administration</td>
</tr>
<tr>
<td></td>
<td>• On a 64-bit system: %ProgramFiles(x86)%\Sage\CRM\WWWRoot\Help&lt;Language&gt;\Administration</td>
</tr>
</tbody>
</table>

In the table above:

- `<InstallName>` is the installation name you specified when installing Sage CRM.
- `<Language>` is the language of the help files, for example, EN, DE, ES, or FR.

Local help files include context-sensitive help, which users can access by clicking the Help button in the Sage CRM UI. The language in which context-sensitive help is displayed depends on the user’s language preference. For more information, see Setting up a new user. If the help file in the user’s chosen language has not been installed, help is displayed in system default language.

After installing help files, you can edit the files or replace them completely.

Sage CRM help is created using Madcap Flare. If you have the expertise and licenses to create a customized help project which mirrors the Sage CRM help file structure, you can replace parts or all of the standard Sage CRM help with your customized project. Alternatively, you can create help using the help authoring tool of your choice and replace part or all of the standard Sage CRM help.

If you use a customized project, ensure the following:

- The default initial file for the User Help and System Administrator Help is named Default.htm and located in the corresponding folder (Main Menu or Administration) specified in the table above. Sage CRM looks for that file if no context-sensitive link has been set.
- The help content files are HTM files located in the corresponding folder (Main Menu or Administration). Only files meeting these criteria can be selected from the Inline Translation tool used to set up the context-sensitive links. For more information, see Customizing help links.
Switching between local and web help

When help files are installed locally on your Sage CRM server, you can select which help files are displayed to users and system administrators when they click the Help button. Possible options are:

- Local help files installed on your Sage CRM server.
- Help files hosted on dedicated web servers.

To select which help files are displayed:

1. Log on to Sage CRM as a system administrator.
2. Go to <My Profile> | Administration | System | System Behavior.
3. Click Change.
4. In Use local help files, select a value. For more information, see System behavior fields.
5. Click Save.

Customizing help links

In Sage CRM, each mode represents a unique help link. For example, the help link on the Company Summary page in view mode is different to the help link in edit mode. This means you can set up a help link specific to viewing, changing, or deleting the record.

1. Click <My Profile> | Administration | Customization | Translations.
2. Select Inline Translation Mode.
3. Navigate to the page where you want to change the existing help link.
4. Click the Help action button. A list of existing help files is displayed in a new browser window. The help file currently linked to the page is highlighted in the list. The list of files displayed here is filtered to display any *.HTM file in ..WWWRoot\HELP\EN\Main Menu\Content\User or ..WWWRoot\HELP\EN\Administration\Content\Administrator. To link the page to a custom help page, ensure the help page is saved in one of these folders.
5. Select the help file and click Save.
6. Click <My Profile> | Administration | Customization | Translations, and clear Inline Translation Mode. When the user clicks the Help button on the page where you changed the link, the new help page is displayed.
Adding field-level help

Field-level help displays tooltips for fields when you hover on them. The tooltip for the field is displayed on all screens in Edit mode where the field is displayed. This includes search screens where the field is present. The tooltip cannot be accessed from touch-screen devices.

1. Identify the field name where you want field-level help to be displayed. For example, pers_suffix.
2. Click <My Profile> | Administration | Customization | Translations.
3. Click New.
4. Add the new translation. The caption code must match the column name. For example, with pers_suffix, the caption family must be set to ColHelpText, and the caption family type to Tags.
5. Type the text for the field tooltip in the language translation fields.
6. Click Save. A question mark icon is displayed beside the field. Hover over the question mark icon to view the help text.

Customizing onscreen coaching

Onscreen coaching is displayed in a panel on Sage CRM screens. It provides general information and tips about the screens to users. You can add new coaching text, modify existing captions, or copy text initially intended for one screen and use it in a different context.

1. Enable coaching captions in <My Profile> | Administration | System | System Behavior | Allow Coaching In CRM.
2. Click <My Profile> | Administration | Customization | Translations.
3. Select Inline coaching captions editing. A new Add/Edit Coaching Text link is displayed at the top of every screen. This link lets you add or edit the coaching text for the current screen.
4. Navigate to the screen where you want to add new on-screen coaching text. For example, click New | Company. Enter a name in Company Name and click Enter Company Details.
5. Click Add/Edit Coaching Text at the top of the screen. The Onscreen coaching page is displayed in a new window.
6. Select Create new on-screen coaching text.
   - To re-use text from another screen, select Re-use existing on-screen coaching text. Any changes you make to the coaching text appear on all other screens that use this text.
   - To re-use text from another screen, select Clone existing on-screen coaching text. Any changes you make to the coaching text does not appear on other screens.
7. Enter the text you want to display in the onscreen coaching and click Save. You can use basic HTML bold and bullet list commands to customize the way your onscreen coaching text is displayed. The updated coaching caption is displayed at the top of the screen.
8. Click <My Profile> | Administration | Customization | Translations.
9. Unselect Inline Coaching Captions Editing. The Add/Edit Coaching Text link is removed from all screens.
Component Manager

- Introduction to Component Manager
- Uploading and installing components

Introduction to Component Manager

Component Manager allows customizations made on one Sage CRM system to be saved and transferred to another Sage CRM system. It enables Sage CRM developers to package and reuse implementation-specific customizations in future implementations.

The Extensibility Module is required to record changes and create a component. For more information on recording and creating components, see the Developer Help on the Sage CRM Help Center.

Components supplied to you may contain full details of any of the following areas:

- Field Customizations.
- Field Security—where the update applies to "Everyone".
- Screen Customizations—including Field Level Scripting and Custom Content.
- View Customizations.
- List Customizations.
- Tab Customizations—including System Menus and Menu Buttons.
- Block Customizations—including Dashboard blocks.
- Table and Database connections.
- TableScript Customizations.
- Translations—including inline translation mode, field customization method and translations list method.
- Reports—creation of new reports and modification of existing ones.
- Most Workflow Customizations.
- Button Groups.
- Interactive Dashboards.

Customization script files, such as ASP pages, will be included automatically if they are directly referred to (for example, by a newly created tab). However, when an ASP page is updated, or when a file that is indirectly referred to is added (for example, an "include file" in an ASP page), then these files must be manually copied to the component folder. For more information, see the Developer Help on the Sage CRM Help Center.
Uploading and installing components

The following stages are involved in uploading and installing components:

- Preparing to install components
- Uploading components
- Installing components

Preparing to install components

Before you install a component, you need to make a note of the following:

- Ensure that the component you are about to install is in ZIP file format.
- Component ZIP files supplied to you may contain more than one component. When you upload a ZIP file containing more than one component, all of the components contained in the ZIP file are available for installation.
- Copy the component ZIP file to a location where it is easily accessible.

**Tip:** By default, you can install a component only once. To allow multiple installs of a component, open the component ecf file and set `multipleinstalls` to `Y`.

Uploading components

1. Click `<My Profile> | Administration | Customization | Component Manager`. The Components page is displayed. If any components were previously installed on your system, they are listed on this page.
2. From the Add Component panel, browse to the component ZIP file and click Open.
3. Click Upload New Component. The Component is added to the Available Components list. The Available Components list displays all of the components that have been uploaded to the server. All of these components are available to install. The list of available components displays component descriptions unless a description is not available, in which case the component name is displayed.

Installing components

1. From the Components tab, select the component you want to install from the Available Components list.
   - View Details allows you to view more information about the component before it is uploaded, such as the version it was created in, and a detailed description of the component.
2. Click Install Component to install the component.
   - The next step depends on whether parameters were specified when the component was created.
Parameters give you choices as to the way in which the component gets installed.

- If parameters were specified, the Parameters, Step 1 of 2 page is displayed with a number of fields. Complete the fields and select the Install Component button to continue installing the Component. The Parameters, Step 1 of 2 screen may also be displayed without fields, but with information about the component you are installing.
- If parameters are not specified, a message displays to inform you that parameters have not been specified in the ECF file.
- **Apply All Changes** defaults to Yes. It allows you to overwrite existing customizations made by installing previous components. In most cases, this drop-down should be set to Yes. Selecting No preserves changes to the same objects made by a previous component. For more information, see the Developer Help on the Sage CRM Help Center.
- **Preview Install** - allows you to see the actual script that will be executed when the component is installed, as well as a prediction of whether each step will be successful. From the Preview Install, Step 2 of 2 page you can export the script to a CSV file for closer examination.

3. Click **Install Component** to continue. If **Apply All Changes** is set to Yes, a dialog box is displayed to warn you that changes from previous components will be overwritten.

4. Click **OK** to continue. Component Manager starts to install the scripts. This involves:
   - Loading the new information.
   - Recreating the views.
   - Reloading the metadata.
   The installation process may take a few minutes to complete. Progress information is displayed while the component is being installed.

5. Once the component is installed you can select **View Log File** to view detailed information about the install. You can also view the log file from <My Profile> | Administration | System | Logging.

6. Click **Continue**. The Components tab is displayed, and the component you installed is displayed in the list of installed components.

### Entities

- Creating a custom entity
- Modifying a custom entity
- Making a custom entity available for reassignment
- Enabling deduplication for a custom entity
- Changing the custom entity logo
- Creating a report view for an entity
Creating a custom entity

You can create custom entities in your Sage CRM environment. To do that, you need to download, install, and use the Advanced Customization Wizard. This wizard is distributed as an optional Sage CRM component. It helps you to configure the various parameters of your custom entity.

1. Download the Advanced Customization Wizard .zip file from the Sage CRM Partner Community. Make sure you download the wizard for your version of Sage CRM. You can search for and download the Advanced Customization Wizard (formerly known as the Main Entity Wizard) on the Sage CRM Partner Community.

2. To access the Partner Community, you must be either a Sage CRM Business Partner or member of the Sage CRM Developer Program. For more information on how to join, see Join the Sage CRM Developer Program.

3. In Sage CRM, install and start the Advanced Customization Wizard:
   a. Log on to Sage CRM as a system administrator.
   b. Go to <My Profile> | Administration | Customization | Component Manager.
   c. Under Add Component, specify the Advanced Customization Wizard .zip file you downloaded in step 1 of this procedure.
   d. Click Upload new component.
   e. Under Available Components, click to select Advanced Customization Wizard, and then click Install Component. After its installation, the Advanced Customization Wizard remains listed under Available Components. This allows you to use the wizard to create custom entities in the future.

4. On the Component Parameters, Step 1 of 2 screen, specify parameters for the entity being created. For more information about these parameters, see Entity parameters. Optionally, you can click Preview Install to view the configured entity parameters and export them to a Comma-delimited values (.csv) file.

5. When you are finished, click Install Component and wait until entity creation completes. In this step, the following screen elements are created:
   - Name and status fields
   - Search, entry, summary, and top content screens
   - A grid for the new entity
   - A tab group with a tab that contains a custom summary screen
   
   Other screen elements depend on how you configured the entity parameters in step 3 of this procedure.

6. When prompted, click Continue to finalize entity creation.
## Entity parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entity Name</strong></td>
<td>Enter the name for the new custom entity you want to create. This name identifies the following:</td>
</tr>
<tr>
<td></td>
<td>• Entity table in the Sage CRM database.</td>
</tr>
<tr>
<td></td>
<td>• Entity caption in the Sage CRM user interface.</td>
</tr>
<tr>
<td></td>
<td>The name you enter must:</td>
</tr>
<tr>
<td></td>
<td>• Include 26 characters or less.</td>
</tr>
<tr>
<td></td>
<td>• Be different from the existing names of tables in the Sage CRM database.</td>
</tr>
<tr>
<td><strong>Entity Column Prefix</strong></td>
<td>Enter the four letter prefix you want to add to the names of columns in the entity table. Do not include an underscore. The prefix must follow the applicable identifier rules configured on the database server.</td>
</tr>
<tr>
<td><strong>Tag with Component Name</strong></td>
<td>Allows you to script out and further customize new entities. The value in this text box has the following format: <code>&lt;EntityName&gt;_Component</code> A new component with this name is added to Existing Components. When creating a new custom entity, you can select this component and click Preview Script to view the changes involved in creating the entity. You can set this component as the currently recording component and further customize the entity. For example, you can script out the entire customization. For more information, see Scripting customizations in the Developer Help on the Sage CRM Help Center.</td>
</tr>
<tr>
<td><strong>Add to My CRM</strong></td>
<td>When selected, creates a custom list and a custom tab for the My CRM work area. Displays a list of new entity records associated with a user.</td>
</tr>
<tr>
<td><strong>Add to Find</strong></td>
<td>When selected, makes the custom entity available for search in Sage CRM. Selecting this check box creates a custom search entry screen and a corresponding search results list.</td>
</tr>
<tr>
<td><strong>Add to Team CRM</strong></td>
<td>When selected, creates a custom list, an ASP page that displays the list, and a custom tab for the Team CRM work area. Displays a list of all new entity records associated with a team.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Has Companies</td>
<td>When selected, creates a company tab and adds a corresponding custom company list to the tab group. This enables you to view a list of associated companies for all new entity records, and link existing companies to the new entity using a <strong>Link</strong> button. To set up deduplication for companies in this scenario, see <a href="#">Enabling deduplication for a custom entity</a>.</td>
</tr>
<tr>
<td>Has Accounts</td>
<td>When selected, creates an account tab and adds a corresponding custom account list to the tab group. This enables you to view a list of associated accounts for all new entity records, and link existing accounts to the new entity using a <strong>Link</strong> button. This check box is only available if Integration is set up.</td>
</tr>
<tr>
<td>Owned by Companies</td>
<td>When selected, adds a custom tab to the Company tab group. This custom tab displays a list of associated new entity records for a company.</td>
</tr>
<tr>
<td>Allow Web Service Access</td>
<td>When selected, enables the new entity for Web Services. For more information, see Web Services in the <em>Developer Help</em> on the <a href="#">Sage CRM Help Center</a>.</td>
</tr>
<tr>
<td>Has People</td>
<td>When selected, creates a people tab and adds a corresponding custom people list to the tab group. This enables you to view a list of all associated people for all new entity records, and link existing people to the new entity using a <strong>Link</strong> button. To set up deduplication for people in this scenario, see <a href="#">Enabling deduplication for a custom entity</a>.</td>
</tr>
<tr>
<td>Owned by People</td>
<td>When selected, adds a custom tab to the People tab group. This custom tab displays a list of associated new entity records for a person.</td>
</tr>
<tr>
<td>Allow Read-only SData Access</td>
<td>When selected, enables the new entity for SData. For more information, see SData in the <em>Developer Help</em> on the <a href="#">Sage CRM Help Center</a>.</td>
</tr>
<tr>
<td>Has Opportunities</td>
<td>When selected, creates an opportunities tab and adds a corresponding custom opportunities list to the tab group. This allows you to view all the associated opportunities for all new entity records.</td>
</tr>
<tr>
<td>Has Leads</td>
<td>When selected, creates a lead tab and adds a corresponding custom leads list to the tab group. This allows you to view all the associated leads for all new entity records.</td>
</tr>
<tr>
<td>Owned by Leads</td>
<td>When selected, adds a custom tab to the Leads tab group. This custom tab displays a list of associated new entity records for a lead.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Has Cases</td>
<td>When selected, creates a cases tab and adds a corresponding custom cases list to the tab group. This allows you to view associated cases for all new entity records.</td>
</tr>
<tr>
<td>Owned by Cases</td>
<td>When selected, adds a custom tab to the Cases tab group. This custom tab displays a list of associated new entity records for a case.</td>
</tr>
<tr>
<td>Has Communications</td>
<td>When selected, creates a communications tab and adds a corresponding custom communications list to the tab group. This allows you to view associated communications for all entity records. Select this check box to perform mail merges from the context of the newly created entity.</td>
</tr>
<tr>
<td>Has Library</td>
<td>When selected, creates a library tab and adds a corresponding custom library list to the tab group. This enables you to view all associated library entries for all new entity records. Select this option to perform mail merges from the context of the newly created entity.</td>
</tr>
<tr>
<td>Owned by Orders</td>
<td>When selected, adds a custom tab to the Orders tab group. This custom tab displays a list of associated new entity records for an order.</td>
</tr>
<tr>
<td>Owned by Quotes</td>
<td>When selected, adds a custom tab to the Quotes tab group. This custom tab displays a list of all the associated new entity records for a quote.</td>
</tr>
<tr>
<td>Workflow</td>
<td>When selected, creates a workflow for the custom entity and enables default workflow rules for the new entity.</td>
</tr>
<tr>
<td>Has Workflow Progress</td>
<td>When selected, creates a progress table for the custom entity table and allows you to add progress notes for custom entity records.</td>
</tr>
<tr>
<td>Deduplication</td>
<td>When selected, creates a deduplication screen for the new entity so you can set deduplication rules in Sage CRM. To set up a deduplication screen for a new entity that has People or has Companies, see Enabling deduplication for a custom entity.</td>
</tr>
<tr>
<td>For Dot Net</td>
<td>When selected, creates an entity for which you can write a .NET module instead of using ASP pages. The entity is created with metadata in the usual way but as ASP pages are not created, you must use the .NET DLL to customize the entity.</td>
</tr>
<tr>
<td>Owned by Accounts</td>
<td>When selected, adds a custom tab to the Account tab group. This custom tab displays a list of associated new entity records for an account. This check box is only available if Integration is set up.</td>
</tr>
<tr>
<td>Owned by Opportunities</td>
<td>When selected, adds a custom tab to the Opportunities tab group. This custom tab displays a list of associated new entity records for an opportunity.</td>
</tr>
</tbody>
</table>
ASP files and metadata generated for custom entities

When you use the Advanced Customization Wizard to create a new custom entity, the wizard may generate the following:

- ASP files
- Metadata

ASP files

The Advanced Customization Wizard generates custom ASP files for the custom entity depending on the component parameters you configure for the entity.

These ASP files are stored in one of the following locations:

- **On a 32-bit (x86) system:**
  %ProgramFiles%\Sage\CRM\<InstallName>\WWWRoot\CustomPages\<EntityName>

- **On a 64-bit (x64) system:**
  %ProgramFiles(x86)%\Sage\CRM\<InstallName>\WWWRoot\CustomPages\<EntityName>

<table>
<thead>
<tr>
<th>File name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Company&gt;&lt;EntityName&gt;.asp</td>
<td>Lists new entity records owned by a particular entity. For example, Company, if you select <strong>Owned By Companies</strong> on the Component Parameters screen. A similar file can be generated for People, Leads, Opportunities, Cases, Accounts, Quotes, and Orders.</td>
</tr>
<tr>
<td>&lt;EntityName&gt;&lt;Person&gt;.asp</td>
<td>Displays the new entity's people, if you select <strong>Has People</strong> on the Component Parameters screen. A similar file can be created for Communications, Case, Lead, Opportunity, Company, Library, and Accounts.</td>
</tr>
<tr>
<td>&lt;EntityName&gt;Channel.asp</td>
<td>Lists new entity records associated with a Team on the <strong>Team CRM</strong> area, if you select <strong>Add To Team CRM</strong> on the Component Parameters screen.</td>
</tr>
<tr>
<td>&lt;EntityName&gt;Summary.asp</td>
<td>Provides the summary page for new entity records.</td>
</tr>
<tr>
<td>&lt;EntityName&gt;Find.asp</td>
<td>Enables you to search for the new entity records if you select <strong>Add To Find</strong> on the Component Parameters screen.</td>
</tr>
<tr>
<td>File name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;ToDo.asp</code></td>
<td>Lists new entity records associated with a user on the My CRM area, if you select <strong>Add To My CRM</strong> on the Component Parameters screen.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;Dedupe.asp</code></td>
<td>Displays the custom dedupe screen if you select <strong>Deduplication</strong> on the Component Parameters screen. If <strong>Deduplication</strong> is cleared, this file redirects you to <code>&lt;EntityName&gt;New.asp</code>.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;Conflict.asp</code></td>
<td>Lists conflicts that dedupe entrygroup finds.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;Library.asp</code></td>
<td>Enables you to link library items to the new entity.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;&lt;Company&gt;Link.asp</code></td>
<td>Enables you to create links between the entity records and other companies or people.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;New.asp</code></td>
<td>Enables you to create new entity records.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;WF.asp</code></td>
<td>Enables you to create a workflow for the new entity.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;ProgressList.asp</code></td>
<td>Enables you to progress the new entity record.</td>
</tr>
</tbody>
</table>

**Metadata**

The Main Entity Wizard generates metadata for the new main entity depending on the component parameters you configure for the entity. You can view the metadata in Enterprise Manager (for example, in the Custom_Tables table) and in Sage CRM (`<My Profile> | Administration | Customization | <Entity>`).

<table>
<thead>
<tr>
<th>Metadata</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;EntityName&gt;SearchBox</code></td>
<td>The entry screen used for search selects and finds on new entities.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;NewEntry</code></td>
<td>The entry screen used to create new entity records.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;BoxDedupe</code></td>
<td>The deduplication screen for the custom entity, if you selected Deduplication on the Parameter Info screen.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;TopContent</code></td>
<td>The context area for the new entity records.</td>
</tr>
<tr>
<td><code>&lt;EntityName&gt;SummaryScreen</code></td>
<td>The summary screen for new entity records.</td>
</tr>
</tbody>
</table>
Example: Creating a custom entity named Project

This example illustrates how to create a new entity called Project.

The Project entity

- Is owned by the Company entity.
- Can have People or Cases associated with it.
- Is available in the My CRM and Team CRM work areas.
- Is searchable in Sage CRM.
- Has workflow enabled.

1. Install and start the Advanced Customization Wizard.
   For step-by-step instructions, see Creating a custom entity.

2. On the Component Parameters, Step 1 of 2 screen, use the following required options:
   - **Entity Name.** Enter Project. A new database table called Project is created in Sage CRM. The word Component is appended to the entity name and Project_Component is automatically entered in Tag With Component Name.
   - **Entity Column Prefix.** Enter proj. This prefix identifies standard fields created for the new entity. For example, the Project entity includes information about project manager names stored in a field called proj_manager. The underscore character (_) is automatically inserted in the field name.

3. Select the following optional check boxes:
   - **Owned by Companies.** Indicates that each Project record must be associated with a company.
   - **Has People.** Enables users to associate people with Project records.
   - **Has Cases.** Enables users to associate cases with Project records.
- **Add to My CRM.** Makes Project records available in the **My CRM** work area.
- **Add to Team CRM.** Makes Project records available in the **Team CRM** work area.
- **Add to Find.** Enables users to search for Project records in Sage CRM.
- **Workflow.** Makes the Workflow screen available for Project records.
- **Workflow Progress.** Makes the Workflow Progress screen available for Project records.

4. Click **Install Component.** When the component is installed, the Project entity becomes available in **<My Profile> | Administration | Customization.**

### Modifying a custom entity

To modify custom entity screens, fields, lists, and tabs created by the Advanced Customization Wizard, go to **<My Profile> | Administration | Customization | <Entity>.**

Depending on the options you select on the Parameter Info screen, an entity progress table may be available. For example ProjectProgress. You can customize this in the same way as a typical progress table.

### Making a custom entity available for reassignment

When a custom entity is available for reassignment, administrators and info managers can reassign entity records of that type associated with one user to another user or team of users.

When you create a custom entity, it is automatically added to the Reassign User Records page. Also the **Status** field (proj_status) that is used as a filter is automatically added to the new table.

To prepare the custom entity for reassignment, the administrator has to edit or add the necessary values of the **Status** field, as follows:

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | Customization | <Entity> | Fields.**
3. In the **Field Caption** column, locate **Status.**
4. In the **Field Type** column, click **Selection** for the **Status** caption.
5. On the screen that opens, edit or add values in the **Selection** list as appropriate. These are the values that can be selected in the **Status** field for the entity. For more information, see Field Customization in the **System Administrator Help.**
6. When you are finished, click **Save.**
Enabling deduplication for a custom entity

If your custom entity has associated Companies or Persons, and you want to display a deduplication page when you create a Company or Person from within the context of the custom entity, do one of the following:

- To enable deduplication if the entity has Companies, open `<EntityName>Company.asp` and change the action from 140 to 1200.
- To enable deduplication if the entity has Persons, open `<EntityName>Person.asp` and change the action from 141 to 1201.

Tip: For more information about URL, see `Url(Action)` in the Developer Help on the Sage CRM Help Center.

Changing the custom entity logo

Each custom entity has a small and a large logo. On a Sage CRM server, these logos are stored in the .gif files that are automatically created for each custom entity. The names of these .gif files are based on the corresponding entity name, as follows:

- `<EntityName>.gif`
- `small_<EntityName>.gif`

When the current theme in Sage CRM is Contemporary, the default locations of these files are as follows:

- On a 32-bit (x86) system:
  `%ProgramFiles%\Sage\CRM\CRM\WWWRoot\Themes\Img\Ergonomic\Icons\Ergonomic\Icons\Summary`
- On a 64-bit (x64) system:
  `%ProgramFiles(x86)%\Sage\CRM\CRM\WWWRoot\Themes\Img\Ergonomic\Icons\Ergonomic\Icons\Summary`
To change the default logos for an entity, create your custom .gif logo files, name them according to the patterns above, and then copy your files to the appropriate locations to overwrite the original logo files stored there.

Creating a report view for an entity

You can create a report view for an entity and select the tables and columns to be included in a report. For example, a report view for an entity named Project could display all cases associated with a project, the person who logged the cases, case status, case priority, and case description.

1. Log on to Sage CRM as a system administrator.
2. Go to <My Profile> | Administration | Customization | <Entity>.
   The entity must correspond to the main database table you reference in the view.
3. Click the Fields tab to see the entity columns that you can include in the view.
   Each entity also has a hidden unique identifier that's used for SQL joins.

<table>
<thead>
<tr>
<th>Table</th>
<th>Unique ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>proj_projectid</td>
</tr>
<tr>
<td>Cases</td>
<td>case_caseid</td>
</tr>
</tbody>
</table>

4. Click the Views tab and then click New.
5. Use the following options:
   - **View Name.** Enter a name for the view. The name must start with the letter v and be a single word, no blank spaces allowed. Example: vProjectCaseView
   - **Reports View.** Select this check box to make the view available when creating a new report.
   - **Description.** Enter an informative description of the view.
   - **Translation.** Enter a translation for the view. This is what the user sees on the screen when the view is selected from the drop-down list.
   - **View Script.** Enter or edit the script in this text box as necessary.
6. Enter SQL query for the new view. The columns in the SELECT statement are included in the report.

   CREATE VIEW vProjectCaseView
   AS
   SELECT proj_name, case_caseid, case_openedby, case_priority, case_status, case_description
   FROM PROJECT
   INNER JOIN cases
   ON proj_projectid = case_projectid
   SQL script for the new report view

7. Click Save.
The new view is listed in Source View on the Report Options, Step 1 of 2 page when you create a new report.

**Fields**

- Creating a field
- Editing a field
- Deleting a field
- Using field security
- Customizing mappings

**Creating a field**

You can create a new field and add it to a screen. For example, to track the overall relationship of a customer to your company, you can add a Relationship field to the Company table.

1. Click `<My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>.
2. Click the **Fields** tab.
3. Click **New**.
4. Complete the **Field properties**.
5. Click **Save**.
6. If you've created a selection field, the Maintain Lookup Selections screen is displayed and you can create values for the selection list.
   a. Enter the code and translation for a list value and click **Add**. The code must be unique and should consist of text rather than numbers.
   b. To change the position of a value in the list, select the value and use the **Up** and **Down** arrows to reposition it.
   c. Click **Save**.
7. Add the field to the relevant screen. For more information, see Adding a field to a screen.

**Field properties**

The tables below explain the standard fields on the Change Database Field Properties screen, non-standard fields that are displayed depending on the Entry Type you select, and the different Entry Types.

**Standard fields**
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Type</td>
<td>Defines how the user inputs information to the field. Additional fields are displayed on the Change Database Field Properties screen depending on the Entry Type you specify. See the table below for details.</td>
</tr>
<tr>
<td>Column Name</td>
<td>The field name in the database. The naming convention is the table abbreviation_field name, for example comp_relationship. Do not use extended characters in the column name.</td>
</tr>
<tr>
<td>Caption</td>
<td>The field name on the screen. For example, Relationship.</td>
</tr>
<tr>
<td>Max Length</td>
<td>The maximum length of the field.</td>
</tr>
<tr>
<td>Entry Width</td>
<td>The width of the field.</td>
</tr>
<tr>
<td>Default</td>
<td>The default entry for the field. If the value of Entry Type is Search Select Advanced, you can set Default to search within the current entity, person, company, or custom entity. For example, if your search entity is Opportunity, and you want the search to show only opportunities in the current Company context, set Default to Search With Current Company. If you leave this field blank, the search doesn't filter on the current context.</td>
</tr>
<tr>
<td>Exclude from Quick Find</td>
<td>Quick Find allows users search for key terms across all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once. It searches text, email, and URL fields. You can exclude an individual entity field from Quick Find to narrow the range of results, reduce the size of the index and RAM requirements, and shorten the time to return results. You can also exclude an entity from Quick Find. For more information, see Configuring Quick Find.</td>
</tr>
</tbody>
</table>

### Non-standard fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lookup Type</td>
<td><strong>Create New Lookup</strong>: You must create a new list of selection field values.</td>
</tr>
<tr>
<td></td>
<td><strong>Use Existing Lookup</strong>: You can use an existing list of selection field values.</td>
</tr>
<tr>
<td>Lookup Width P&lt;sub&gt;x&lt;/sub&gt;</td>
<td>The width of the selection list.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Selection Height</td>
<td>The height of the selection list. For example, set this to zero to create a drop-down selection list when the number of selection values is greater than zero. Set this to 10 to create a drop-down selection list when the number of selections is greater than 10. If this field is set to 10 and the list has only three entries, the selection list is displayed as one long list, rather than a drop-down list.</td>
</tr>
<tr>
<td>Search SQL</td>
<td>An SQL filter clause that's applied to the search. For example, to create a field that allows a user to select only opportunities of type Consulting, enter <code>oppo_type = 'Consulting'</code> to restrict the available results. If both Default and Search SQL are blank, no restrictions are applied and a user can select any returned record.</td>
</tr>
<tr>
<td>Search Entity</td>
<td>The default entity that Search Select Advanced fields search. You can customize Search Entity defaults in &lt;My Profile&gt;</td>
</tr>
<tr>
<td>View Field</td>
<td>Additional columns that are displayed in the Search Select Advanced search results. For example, a Person field could also list the related business phone number.</td>
</tr>
<tr>
<td>Tied Fields</td>
<td>The entity that the Search Select Advanced field can search in addition to the default search entity. For example, to allow a user choose a case or an opportunity from a Search Select Advanced (SSA) field, create an SSA field for Case and another SSA field for Opportunity. Tie case to the Opportunity SSA field and add the Opportunity SSA field to the screen. For an example of this in Sage CRM, see the Regarding field on the Communication entity. It allows a user carry out a Search Select Advanced on opportunities or cases.</td>
</tr>
<tr>
<td>Restrictor Fields</td>
<td>A field that restricts the searched values for the current Search Select Advanced field. Use this field if there's a relationship between this entity and another SSA field on the same table. For example, if the value of Restrictor is Company for a Person SSA field, when a user adds a new case and selects the company, the Person SSA field shows only the people in that Company. This works because there's a relationship between Person and Company whereby a person belongs to a company.</td>
</tr>
</tbody>
</table>
### Field

### Description

**Linked Fields**

Fields that are populated based on the value that a user selects in the SSA field. For example, if a Phone field is added as a linked field to a Person SSA field, the Phone field is populated with the phone number of the person selected in the Person field.

You must declare the Linked field in the form "Select Field=Form Field". For example, to select a company's default SLA on the Cases screen, create a field called ColP_LinkedField. The SSA field "Case_primarycompanyid" is declared with the linked field value as "Comp_SLAID=Case_SLAID" where Comp_SLAID is the field used in the select and Case_SLAID is the actual field on the form. On selecting any Company using SSA, the default SLA is automatically selected in the SLA drop-down on the screen.

You can link to multiple fields using a comma to separate each field. There are some restrictions: do not use a semicolon to separate the fields as this breaks functionality. And don't link to a field that's used in the WHERE clause of the view as this causes the drop-down list to be blank.

**Search On All View Fields**

Allows users to search on all columns listed in View Field.

### Entry types

**Entry Type**

**Description**

**Text With Check Box Search**

A text field that has radio buttons when used on a search screen or as a search field in a report or group. The radio buttons translations are Has Value, Is Empty, or Either. You can customize the translations for the radio buttons in <My Profile> | Administration | Customization | Translations.

**Product**

A list of products. You set up products in <My Profile> | Administration | Customization | Secondary Entities | Products.

For more information, see Products.

**Intelligent Select**

A selection list populated with predefined selections. If the number of entries in the selection list is greater than the selection height, the user can search first and then select. Use this entry type only when the number of entries in the list is unmanageable for a simple Selection.

**Multi-select**

A selection list that allows a user to select more than one option. You can add multi-select fields to all screen types, and use them in reports and groups. Sage CRM treats multiple selections as logical ORs. If you run a report using two search criteria, records that meet both OR either criteria are returned.
<table>
<thead>
<tr>
<th>Entry Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Only</td>
<td>Date field. A user can enter a date or use the calendar. You can set a default system date of Current Date Plus Delta (in minutes) or Current Date. Date Only fields are not time zone adjusted.</td>
</tr>
<tr>
<td>Currency</td>
<td>A user can enter an amount and select a currency from a list. You define the currency list in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Search Select Advanced</td>
<td>Allows a user to search for records on an entry screen. A user can enter a few letters in a field, click the SSA icon, and select an option from the search result hyperlinks beneath the field. For example, the SSA field on Cases tab in the context of a Solution.</td>
</tr>
<tr>
<td>Minutes</td>
<td>Duration (in minutes) of cases and opportunities as they move from one stage to another. You must specify the fields that flag the Start Time and End Time. For example, Duration on the Case Tracking tab.</td>
</tr>
<tr>
<td>Currency Symbols</td>
<td>A list of all currencies in the system.</td>
</tr>
<tr>
<td>User Group Select</td>
<td>Allows a user to select an existing static or dynamic group and link it to a record. The record is not added to the group.</td>
</tr>
<tr>
<td>Text</td>
<td>Free text in a single line. For example, Company Name.</td>
</tr>
<tr>
<td>Stored Proc</td>
<td>Initiates a stored procedure.</td>
</tr>
<tr>
<td>Check Box</td>
<td>Check box. For example, Private on the Communications entry screen. When used on a search screen, the check box is converted into radio button options: 'Has Value', 'Is Empty,' or 'Either'. You can customize translations for these options in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number. The value is displayed as a hyperlink. CTI-enabled users can click the value to make an outbound call.</td>
</tr>
<tr>
<td>Multiline text</td>
<td>Multiple lines of free text. For example, Problem Details on the Case entry screen.</td>
</tr>
<tr>
<td>Email address</td>
<td>A link to send an email. For example, Email on the Person Summary screen.</td>
</tr>
<tr>
<td>WWW URL</td>
<td>WWW URL. For example, Website on the Company entry screen.</td>
</tr>
<tr>
<td>Selection</td>
<td>A selection list populated with predefined selections. For example, Action on the Communications entry screen.</td>
</tr>
<tr>
<td>User Select</td>
<td>A list of users. For example, Assigned To on the Case entry screen.</td>
</tr>
<tr>
<td>Entry Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Team Select</td>
<td>A list of teams. For example, Team on the Opportunity entry screen.</td>
</tr>
<tr>
<td>Integer</td>
<td>Numerical value. For example, Certainty on the Opportunity entry screen.</td>
</tr>
<tr>
<td>Numeric</td>
<td>Money value. For example, Revenue Generated on the Opportunity table. Numeric values can be a maximum of 15 digits long, including decimal point and places.</td>
</tr>
<tr>
<td>Date &amp; Time</td>
<td>Calendar and time. For example, Date &amp; Time on the Communication entry screen.</td>
</tr>
</tbody>
</table>

## Editing a field

1. Click `<My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>`.
2. Click the Fields tab.
3. To change the values of a selection field, click Selection in Field Type. The Maintain Lookup Selections screen is displayed.
   a. Select the value that you want to change in Selection and enter the new translation in Change Translation.
   b. Enter the new code in Code. The code must be unique and should consist of text rather than numbers.
   c. Click Update.
   d. To change the position of a value in the list, select the value and use the Up and Down arrows to reposition it.
   e. Click Save.
4. To change field properties, click the field that you want to edit. For more information, see Field properties.
5. Click Save.
6. If you've changed the value of Entry Type to a selection field that's not based on an existing lookup, the Maintain Lookup Selections screen is displayed and you can create values for the selection list. For more information, see Creating a field.

## Deleting a field

You can delete any new fields that you've added. However, you must be careful when updating the database. Ensure all users are logged off Sage CRM when a field deletion is taking place, and that a backup of the database is available. Deleting a field is not reversible. If you make a mistake, you should restore the database backup.
It is recommended that you make major changes to fields and screens on a test system before implementing them in a live environment. Failing to do so may cause unexpected behavior in the system.

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity> | Fields.
2. Click the field name link.
3. Click Delete. If the field is used in reports, scripts, views, groups, escalations, notifications, workflow, tab SQL, or dashboards, you are refused permission to delete it. If the field is not used anywhere in the system, or is used in screens, lists or searches, you are asked to confirm that you want to delete the field.
4. Click Confirm Delete.

**Using field security**

- Working with field security
- Accessing field security
- Adding security types for a field

**Working with field security**

Field security allows you to define how users can access fields associated with a screen. For example, you can make a field invisible to some users, allow others to view the contents of the field but not change them, and grant other users both read and write access. In addition, you can make it mandatory for a user to enter a value in a field before submitting the form.

You can supplement field security with JavaScript by adding code in the scripting boxes available on the Screens tab when customizing an entity. For more information on field-level scripting, see Using generic JavaScript in field level scripting.

Field security changes apply immediately, and to all logged on users. There's no need to reset IIS, to carry out a metadata refresh, or require users to log off and back on.

- If you use field-level security to restrict rights, you must check whether possible conflicts can arise. For example, ensure that a user isn't required to enter a value into a field for which they don't have read access.
- If checkboxes in the Read and Write Access columns are cleared, this means a default denial of access rights to connected security types. For example, if all checkboxes in the Everyone row are cleared, all profiles, teams, or users are denied read and write access to that field. However, a user can access the field or change its contents if a security type that applies to that user is added to the list and the relevant Allow checkboxes are selected.
- If one user is denied read access to a field, security considerations mean that the contents of this field are excluded from keyword searches performed by all users. For more information, refer to System behavior fields.
Accessing field security

You can view the current field security settings for an entity.

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>.
2. Click the pencil icon in the Field Security column beside the field you want to review.
3. The access rights to this field for "Everyone" are defined by default. There's an Allow and Deny checkbox for Read Access and Write Access.

When you select a checkbox, you can also affect the other checkboxes in the row. For example, when you select Allow in the Write Access section, Allow in the Read Access section is automatically selected. When you select Deny in the Read Access section, the checkboxes in the Write Access section become unavailable, indicating that write access is irrelevant when a field is not viewable. In addition, the Required checkbox, which indicates that the field must contain a value for the form to be successfully submitted, is also inactive in this situation because a field that cannot be viewed cannot be marked as required.

Adding security types for a field

You can set field security on an entity for all users, an individual user, a team, a security profile, or a combination of these security types.

For example, you could set up new security types for a user called Susan Maye and for the Sales Manager Profile on the Company SLA field. The following table lists the security types that could affect Susan Maye's rights to view or change the SLA field:

<table>
<thead>
<tr>
<th>Security Type</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>Everyone</td>
</tr>
<tr>
<td>Profile</td>
<td>Sales Manager Profile</td>
</tr>
<tr>
<td>Team</td>
<td>Direct Sales</td>
</tr>
<tr>
<td>User</td>
<td>Susan Maye</td>
</tr>
</tbody>
</table>

Susan Maye is a member of the Direct Sales team and has been assigned the Sales Manager Profile. Susan Maye as an individual user might have write access for the SLA field. However, if either the Direct Sales team or the Sales Manager Profile are denied write access, Susan Maye's personal settings are overridden and she cannot change the value contained by the SLA field. Susan Maye's access to the SLA field is ultimately defined by the "Everyone" rights that apply to every user in the system.

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>.
2. Click the pencil icon in the Field Security column beside the field you want to review.
3. Click New.
4. Select **User** from **Select Security Type**, and highlight the user for whom you want to define field security.

5. Click **Save**. The Modify Field Security page is displayed, showing the new security type for the individual user. The **Allow** check boxes in the Read Access and Write Access columns are selected by default.

6. Select **Deny** in the Write Access column to restrict the user’s access of the field to view (Read) only.
   - If you set a user’s read and write access to **Allow**, and Everyone’s rights are set to **Deny**, the individual user’s rights are also denied, even if they are displayed as allowed.
   - If you set a user’s read and write access to **Deny**, and Everyone’s rights are set to **Allow**, the individual user’s rights are still denied. This is because security types work to define access rights to *restrict* access only. In other words, although security type A can deny read or write access for type B, it does not enable access if the type B has already been denied. If Susan Maye’s Write Access has already been set to Deny, even if Everyone’s access is set to Allow on Read and Write, Susan Maye will not be able to change the field’s value.

7. Click **New**.

8. Click **Profile** and select the profile for which you want to define field security.

9. Click **Save** and click **Continue** to return to the **Fields** tab.

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**Customizing mappings**

- Working with lead mappings
- Mapping leads to opportunities
- Mapping leads to companies and people
- Working with solution mappings

**Working with lead mappings**

Mappings can be created from fields on the Lead table to fields on the Opportunity table. The mappings take effect when the lead is converted to an opportunity.

Currently, a number of fields are converted automatically when a lead is converted to an opportunity, for example the Description field. See the table at the end of this section for the default mappings.

To customize Lead to Opportunity mappings, click **<My Profile> | Administration | Customization | Primary Entities | Leads | Fields**, and click **Mappings**.

Mappings can also be created from fields on the Lead table to fields on the Company and Person tables. The mappings take effect when the lead is matched to a company and a new company record is created.

Currently, a number of fields are converted automatically when a lead is matched to a new company. For example, the Lead Company Name maps to the Company Name. See the table at the end of this section for the default mappings.
Lead to Company mappings can be customized by matching the field names with the same prefix. Person, Address, and Phone mappings must use the same set of hardcoded fields. For more information, see Mapping leads to companies and people.

If you create any new, corresponding mapping in <My Profile> | Administration | Customization, the default system mapping is overwritten.

The table below lists the default system mappings.

<table>
<thead>
<tr>
<th>Lead Field</th>
<th>Maps to</th>
</tr>
</thead>
<tbody>
<tr>
<td>lead_description</td>
<td>oppo_description</td>
</tr>
<tr>
<td>lead_source</td>
<td>oppo_source</td>
</tr>
<tr>
<td>lead_mainproductinterest</td>
<td>oppo_product</td>
</tr>
<tr>
<td>lead_details</td>
<td>oppo_note</td>
</tr>
<tr>
<td>lead_waveitemid</td>
<td>oppo_waveitemid</td>
</tr>
<tr>
<td>lead_companyname</td>
<td>comp_name</td>
</tr>
<tr>
<td>lead_companywebsite</td>
<td>comp_website</td>
</tr>
<tr>
<td>lead_companyrevenue</td>
<td>comp_revenue</td>
</tr>
<tr>
<td>lead_companyemployees</td>
<td>comp_employees</td>
</tr>
<tr>
<td>lead_personlastname</td>
<td>pers_lastname</td>
</tr>
<tr>
<td>lead_personfirstname</td>
<td>pers_firstname</td>
</tr>
<tr>
<td>lead_personsalutation</td>
<td>pers_salutation</td>
</tr>
<tr>
<td>lead_persontitle</td>
<td>pers_title</td>
</tr>
<tr>
<td>lead_personemail</td>
<td>Company Business email (Emai_EmailAddress with Emai_Type = ‘Business’)</td>
</tr>
<tr>
<td>lead_personphonecountrycode</td>
<td>Company Business phone country code (Phon_Countrycode with phon_type ‘business’)</td>
</tr>
<tr>
<td>lead_personphoneareacode</td>
<td>Company Business phone area code (Phon_Areacode with phon_type ‘business’)</td>
</tr>
<tr>
<td>lead_personphononenumber</td>
<td>Company Business phone number (Phon_Number with phon_type ‘business’)</td>
</tr>
<tr>
<td>lead_personfaxcountrycode</td>
<td>pers_faxcountrycode</td>
</tr>
<tr>
<td>lead_personfaxareacode</td>
<td>pers_faxareacode</td>
</tr>
</tbody>
</table>
Mapping leads to opportunities

1. Click <My Profile> | Administration | Customization | Primary Entities | Lead | Fields.
2. Click Mappings. If you've already created mappings, they're displayed in a list. System mappings are not listed.
3. Click New.
4. Select the Lead Custom Field Name that you want to map from and the Mapped Opportunity Field that you want to map to. You can map only fields of the same type to one another. For example, character fields to character fields or integer fields to integer fields.
5. Click Save. The mapping is displayed on the list of mappings. To change it, select the mapping hypertext link.
6. Continue to create as many mappings as you require.
7. To view the effect of the mappings you created, create a new lead and convert it to an opportunity.

Mapping leads to companies and people

To map a field from Lead to Company, name the lead table field lead_companyXXX and the company table field comp_XXX. The field types don't have to be the same. This applies when you are transferring fields from the Lead Company Details area to the company.

However, when mapping from Lead to Person, you must use the following hardcoded values.

- lead_personlastname
- lead_personfirstname
- lead_persontitle
- lead_personsalutation

The same is true for address information:

<table>
<thead>
<tr>
<th>Lead Field</th>
<th>Maps to</th>
</tr>
</thead>
<tbody>
<tr>
<td>lead_personfaxnumber</td>
<td>pers_faxnumber</td>
</tr>
<tr>
<td>lead_companyaddress1</td>
<td>addr_address1</td>
</tr>
<tr>
<td>lead_companyaddress2</td>
<td>addr_address2</td>
</tr>
<tr>
<td>lead_companyaddress3</td>
<td>addr_address3</td>
</tr>
<tr>
<td>lead_companyaddress4</td>
<td>addr_address4</td>
</tr>
<tr>
<td>lead_companycity</td>
<td>addr_city</td>
</tr>
<tr>
<td>lead_companypostcode</td>
<td>addr_postcode</td>
</tr>
<tr>
<td>lead_companystate</td>
<td>addr_state</td>
</tr>
<tr>
<td>lead_companycountry</td>
<td>addr_country</td>
</tr>
</tbody>
</table>
- lead_companyaddress1
- lead_companyaddress2
- lead_companyaddress3
- lead_companyaddress4
- lead_companycity
- lead_companystate
- lead_companycountry
- lead_companypostcode

These fields get mapped to the address for the company.

The phone, fax and email fields are all set to map to the standard phone, fax and email fields. Only hardcoded values can be used for these fields.

Finally, for all of the above to work, the field you are transferring must be on the Entry Screen for both the lead and, for example, the company. For example, to transfer data from lead_companyXXXX to comp_XXXX, comp_XXXX must be on the company entry screen and the lead screen. If you leave it off the company entry screen, you do not get the comp_XXXX data transferred.

To map a field from the Lead to the Company:

1. Look up a field on the company table, which is not currently mapped to the lead. For example, the new field comp_relationship. For more information, see Creating a field.
2. Make a note of the field name. For example, comp_relationship.
3. Click <My Profile> | Administration | Customization | Primary Entities | Lead | Fields.
4. Add a new field called lead_companyrelationship. You should enable the mapping to the company field by selecting comp_relationship as the Lookup Family.

5. Click <My Profile> | Administration | Customization | Primary Entities | Lead | Screens.
6. Click Lead Company Screen and add the new field to the screen.
7. Click <My Profile> | Administration | Customization | Primary Entities | Company | Screens.
8. Click Company Entry Screen and add the new field to the screen.
9. Create a new Lead record and match it to a new Company. The new field and the field selection are carried over to the Company page.

**Working with solution mappings**

You can map fields on the Case table to fields on the Solutions table. The mappings take effect when a Solution is created in the context of a Case.

1. Click <My Profile> | Administration | Customization | Secondary Entities | Solutions | Fields.
2. Click Mappings. Alternatively, click the Field Mappings tab.
3. Select the case fields to be mapped from and the solutions fields to be mapped to. For example, case_description to soln_description.

4. To display the mapped field on the search screen when you link an existing Solution to a Case, select Include In Search.

5. Click Add.

6. When you've finished mapping the fields, click Continue.

7. To view your mappings, open a Case, click the Solutions tab, and click New Solution. The field mappings you created are displayed on the Solution Details page.

## Screens

- Adding a field to a screen
- Adding a checkbox to a screen
- Editing a screen layout
- Inline screen customization
- Maintain Screen Definition fields
- Advanced screen customization

### Adding a field to a screen

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity>.
2. Click the Screens tab.
3. Click the screen you want to customize.
4. Select the new field from Field.
5. Define the position, height, and width and click Add. For more information, see Maintain Screen Definition fields. The new field appears in the Screen Contents list.
6. Highlight the new field and use the up and down arrows to move it within the Screen Contents list. Position the new field next to the field it should precede or follow.
7. Click Update.
8. Click Save.

### Adding a checkbox to a screen

This example adds a new Address Type to the Address screen. It does not require the creation of a new field. There's no field called Type on the Person or Address table. This information is held in a special link table.
1. Click <My Profile> | Administration | Customization | Translations. The Translations Find page is displayed.
2. Enter the translation of an existing address type in Translation and click Find.
3. Click the caption code link.
4. Make a note of the details and click Cancel. This returns you to the Translations Find page.
5. Click New.
6. Create a new translation for the new address type called Delivery, ensuring that the caption family is set as Link_CompAddr and the caption family type is Links.
7. Click Save. The new Address Type checkbox is displayed on the Address screen.

To add a new Person Type check box to the Person screen, follow the same steps using Link_CompPers.
You can add new email and phone types in the same way, using the caption families: Link_CompPhon, Link_PersPhon, Link_CompEmai, and Link_PersEmai.

Editing a screen layout

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity> | Screens.
2. Click the pencil icon in the Customize column beside the screen you want to customize.
3. To add a new field to the screen, add the field to the list of Screen Contents.
4. To change the position of an existing field on the screen, select the field in the Screen Contents list and use the up and down arrows to reposition it.
5. To position a field on a new line, change the on-screen position of the field.
6. Click Update.
7. Click Save.

Inline screen customization

Use inline screen customization to quickly view a screen before and after you customize it. Inline screen customization is also a useful way to find out the name of a screen.

This example customizes the Details panel on the New Appointment screen for a Person.

1. Click <My Profile> | Administration | Customization | Person.
2. Click the Screens tab and select Inline Customization.
3. Open the screen you want to customize. For example, click New | New Appointment.
   On the screen that opens, a Customize Screen link is displayed on each customizable panel.
4. To change the Details panel, click Customize Screen on the Details panel.
5. Make your customization changes. For example, move the Status, Priority, and Territory lists to separate lines, one underneath the other.
6. Click Save. The screen you customized is refreshed to display the updated Details panel.
7. Click `<My Profile> | Administration | Customization | Primary Entities | Person | Screens` and clear **Inline Customization** to return to normal mode.

## Maintain Screen Definition fields

The table below explains the standard fields in the Maintain Screen Definition page. For more information about JavaScript and Sage CRM’s Client-Side API library of functions, see [Advanced screen customization](#).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>List of fields that can be added to the screen.</td>
</tr>
<tr>
<td>Position</td>
<td>Position on the screen. Select New Line or Same Line from the list.</td>
</tr>
<tr>
<td>Hyperlink To</td>
<td>Creates a link to another screen.</td>
</tr>
<tr>
<td>Height</td>
<td>Height of the field on the screen in rows.</td>
</tr>
<tr>
<td>Width</td>
<td>Width of the field on the screen in columns.</td>
</tr>
<tr>
<td>Create Script</td>
<td>You can enter JavaScript which is executed on the server side when the input form is created.</td>
</tr>
<tr>
<td>OnChange Script</td>
<td>JavaScript can be entered, which is executed on the client side as the user changes information on the page. You can enter generic JavaScript and/or Sage CRM’s Client-Side API library of functions.</td>
</tr>
<tr>
<td>Validate Script</td>
<td>You can enter JavaScript which is executed on the server side when the user clicks <strong>Save</strong>.</td>
</tr>
<tr>
<td>Custom Content</td>
<td>You can enter HTML or generic JavaScript and/or Sage CRM’s Client-Side API library of functions.</td>
</tr>
</tbody>
</table>
Advanced screen customization

- Introduction
- Customizing screens with the client-side API
- Adding HTML and generic JavaScript to custom content
- Using generic JavaScript in field level scripting
- Adding field level scripts using JavaScript

Introduction

You can change the way fields behave on a screen.

- **Field security.** A codeless way of securing access rights to fields across all screens.
- **Scripting using the Sage CRM Client-Side API.** A simple, upgrade-proof set of client-side functions which can be called from the OnChange Script field attached to an individual field, or via the Custom Content field associated with a screen or list. This can be most powerfully used to change the appearance of fields on a screen to make user input faster and easier. A basic conceptual knowledge of coding is helpful, but not essential. Scripts using the Client-Side API can all be maintained in a single location in the ..\WWWROOT\JS\CUSTOM folder of your Sage CRM install. Maintaining and updating scripts in this way offers significant time and quality improvements over adding scripts to individual fields or screens. This is the recommended method for carrying out client-side scripting in Sage CRM. Some simple examples are included in the System Administrator Guide. For more information, see the Developer Help on the Sage CRM Help Center.
- **Scripting using generic JavaScript.** Add JavaScript (client-side and server-side) to fields on a screen to, for example, refine field access conditions or validate a field value in a form. Combined with the Extensibility Module, you get access to the complete CRM Object/Block model including properties and methods for each field. For more information, see the Developer Help on the Sage CRM Help Center. Customizations added using this method must be carefully checked during a test upgrade and may require modification to work in future versions. A good knowledge of JavaScript is essential. You can apply generic JavaScript and/or the Sage CRM Client Side API to the Workflow actions listed below.
  - Set Column Value
  - Display Fields for Amendment
  - Reset Column Value

Customizing screens with the client-side API

The Sage CRM client-side API functions give you customization capabilities across three main areas of screen and list customization. For more information, see the Developer Help on the Sage CRM Help Center.
- **Field Level functions** - changing the way specific fields on a page behave. For example, setting a background color or hiding a field.
- **Page Level functions** - changing the way parts of a screen behave. For example, setting an error message, or adding a Print button to a screen.
- **Advanced functions** - these can be used in conjunction with other API calls, for example, to make date comparisons.

**Note:** Client-side scripting is a tool for easily customizing the appearance of CRM screens and lists to suit the way your users work. It is not a substitute for effective data validation or security on your system. This should still be handled by the existing security features of Sage CRM.

You can add the functions in the following areas:

- **<My Profile> | Administration | Customization | Primary Entities or Secondary Entities | <Entity> | Screens | OnChange Script.** Use this field if you want the event to occur only when a specific field is changed. For example, displaying a warning message to the user when the company name is changed. However, you may find it easier to add all your code for a screen in the Custom Content field, and then reference a specific function from the OnChange Script field associated with a particular field.

- **<My Profile> | Administration | Customization | Primary Entities or Secondary Entities | <Entity> | Screens | Custom Content.** The code is activated when the whole screen is in Edit (or View) mode. Code in the Custom Content field must be enclosed in `<script></script>` tags.

- **<My Profile> | Administration | Customization | Primary Entities or Secondary Entities | <Entity> | Lists | Custom Content.** The code is activated when the list or grid is viewed.

- In an external .JS file in the `..\WWWROOT\JS\CUSTOM` folder of your install. JavaScript files placed in this folder are automatically included on most CRM screens - the Interactive Dashboard and the Logon screen are not included. This means that you can put all your custom functions in a centralized .JS file. Then, to apply the code to a specific area of CRM, just reference the function from one of the places mentioned above. This makes it easier to keep the customizations in a central location with fewer changes to the CRM screens.

You should follow these basic guidelines.

- If you are adding the code in **Custom Content**, it must be enclosed with `<script></script>` tags in this format:

  ```
  <script>
  crm.ready(function()
  {
    // Add your script here
  });
  </script>
  ```
If you are adding the code in **OnChange Script**, it does not need to be enclosed with `<script></script>.

Use single quotes only in the OnChange Script field. This also applies to the OnChange Script field in Workflow Customization actions Set Column Value, Reset Column Value, and Display Fields for Amendment.

If you want to try the sample code, please remove any special character formatting which will interfere with the code before pasting into CRM. Pasting into Notepad or a similar text editor before copying and pasting for use with Sage CRM is a good way to do this.

Make sure the first character of the Client-Side API function is lower case. For example, `crm.markRequiredFields`.

### Adding text effects to specific fields

This example adds highlight, bold, and italic effects to two fields on the Company Entry Screen.

1. Click `<My Profile> | Administration | Customization | Primary Entities | Company | Screens`
2. Click the pencil icon in the **Customize** column beside Company Entry Screen.
3. Add the following script to **Custom Content**:

```html
<script>
  crm.ready(function() {
    crm('comp_name').bold().highlight();
    crm('comp_type').italic().underline();
  });
</script>
```

4. Click **Save**.

### Adding highlights to all required fields

This example adds a pink highlight color on all required fields on the Company Entry Screen.

1. Click `<My Profile> | Administration | Customization | Primary Entities | Company | Screens`
2. Click the pencil icon in the **Customize** column beside Company Entry Screen.
3. Add the following script to **Custom Content**:

```html
<script>
  crm.ready(function() {
    crm.markRequiredFields('pink');
  });
</script>
```

4. Click **Save**.
Adding a Print button to a page

This example adds a Print button to the Lead Summary screen.

1. Click <My Profile> | Administration | Customization | Primary Entities | Lead | Screens.
2. Click the pencil icon beside Lead Custom Screen.
3. Add the following script to Custom Content:

   <script>
   crm.ready(function () {
   crm.addButton('print');
   });
   </script>

4. Click Save.

Changing a field value based on another field value

This example changes the Team assigned to an Opportunity depending on the type of opportunity. It’s similar to the Field Level Scripting OnChange Script example, but uses the client-side API instead, and adds pink highlight on Team to alert the user to the change.

1. Click <My Profile> | Administration | Customization | Primary Entities | Opportunity | Screens.
2. Click the pencil icon beside Opportunity Detail Screen.
3. Select Opportunity: Type from the Screen Contents panel.
4. Add the following script to OnChange Script. The first part of the script checks to see if the channelid field is present on the screen.

   if (crm('oppo_type').val() == 'Mix')
   {
   crm('oppo_channelid').val(4);
   }
   else if (crm('oppo_type').val() == 'Consulting')
   {
   crm('oppo_channelid').val(3);
   }
   else
   {
   crm('oppo_channelid').val(2);
   }
   crm('oppo_channelid').highlight('pink');
5. Click **Update** and then click **Save**.

6. Add a new opportunity and select **Consulting** from the Type list. A team value, in this case Customer Service, automatically fills the Team field. If you change the opportunity type to Mix, a different team value, in this case Marketing automatically fills the Team field, which is highlighted is pink.

**Display a message to the user if a check box is left blank**

This example displays a message to the user if the E-marketing opt-out check box isn't selected.

1. Click `<My Profile> | Administration | Customization | Primary Entities | Company | Screens`.

2. Click the pencil icon beside **Company Entry Screen**.

3. Select **comp_optout** from the Screen Contents panel.

4. Add the following script to **OnChange Script**.

   ```javascript
   if (crm('comp_optout').val() == false)
   {
   crm.infoMessage('This company will not receive any E-marketing communications');
   }
   else
   {
   crm.infoMessage(false);
   }
   ```

5. Click **Update** and then click **Save**.

6. Add a new company and leave **Opt-out of E-marketing communications** blank. A message is displayed to the user.

**Adding HTML and generic JavaScript to custom content**

As well as adding scripting customizations using the Client-Side API into the Custom Content field, you can add HTML and generic JavaScript content to an individual page. For example, you can use **Custom Content** to add HTML text to create a link at the top of a screen, or to generate a JavaScript button that pops up an alert box.

The Custom Content is generated at the beginning of the page, so whatever you create appears first in the screen or panel.

For example, add the following HTML text to the Custom Content field of the Company Summary screen. This generates a button to open a web page where you can search on company information. The button is displayed in the top left of the Company Summary panel.

```html
<input type=button value="Company Information" name=Test onclick="window.open('http://www.sagecrm.com')">
```

When you view a related record summary screen, the new button appears in the Company panel.
Using generic JavaScript in field level scripting

You use the normal JavaScript syntax in the Sage CRM Field Level Scripting environment. The only difference is that you do not need to include the scripting `<script></script>` or `<% %>` tags. You can use JavaScript server-side scripts and client-side scripts.

There is no limit to the size of the script that you can enter in the Create, Validate and OnChange fields, although for larger scripts it may be easier to include the script in an ASP page in the `..WWWRoot\CustomPages` folder of the Sage CRM install. For more information, see the Developer Help on the Sage CRM Help Center.

Server-side

- Create Script. This script is run on the server when the screen is created.
- Validate Scripts. This script is run on the server when the user clicks **Save** on the screen.

Client-side

An OnChange script runs on the browser whenever a user changes the field to which the script is attached.

1. Click **<My Profile> | Administration | Customization | Primary Entities or Secondary Entities | <Entity>**.
2. Click the **Screens** tab.
3. Click the pencil icon in the **Customize** column beside the screen containing the field you want to attach the script to.

There's a difference in syntax between server-side scripts and client-side scripts. This is because server-side scripts have access to the current CRM Object's fields and properties, whereas client-side scripts have access to the HTML Document Object Model (DOM). For more information on the CRM Object, see the Developer Help on the Sage CRM Help Center.

Objects accessible in CRM scripting

<table>
<thead>
<tr>
<th>Script Type</th>
<th>Objects Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Script</td>
<td>CRM Object Model, properties and methods (current context). CurrentUser object and Value property (the value the user is submitting).</td>
</tr>
<tr>
<td>Validate Script</td>
<td>CRM Object Model, properties and methods (current context). CurrentUser object and Value property, as well as Valid property and ErrorStr method.</td>
</tr>
<tr>
<td>Script Type</td>
<td>Objects Available</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OnChange Script</td>
<td>HTML DOM properties and methods as well as CurrentUser object and Value property. The Current User and Value are the only CRM Object properties you can reference from the client side.</td>
</tr>
</tbody>
</table>

**Server-side JavaScript (Create, Validate)**

Server-side scripts are executed on the Sage CRM server. Server-side JavaScript extends the core language by supplying objects for running JavaScript on a server. For example, server-side extensions allow an application to communicate with a relational database, provide continuity of information from one invocation to another of the application, or perform file manipulations on a server.

Within server-side scripts you can refer to the complete CRM object model, so you refer directly to entries within the current context. As these scripts are run on the server you are limited to actions that do not output information to the client.

You attach Create Scripts to the field in a screen that the script is to act on when the screen is created. These scripts are commonly used for automatically setting fields based on input information.

The Validate Script also has access to the following properties:

- Valid—Set to false to mark the current entry as invalid.
- ErrorStr—Returns the string in the error content (red bar at top of screen).
- Values—Contains the value the user is submitting.

**Client-side JavaScript (OnChange)**

Client-side scripts are loaded and run on the user’s browser. Client-side JavaScript extends the core language by supplying objects to control a browser and its DOM. For example, client-side extensions allow an application to place elements on an HTML form and respond to user events, such as mouse clicks, form input, and page navigation.

You attach OnChange scripts to the field that the user is going to change (not the field you want the change action to occur on). The properties that are available are the same as for the HTML DOM. The CurrentUser object is available client side in system generated screens.

If you view the source code of the HTML page you can view any changes you are making to the Sage CRM objects.

**Adding field level scripts using JavaScript**

You can view the properties of the individual fields that you can use in Create and Validate scripts from `<My Profile> | Administration | Customization`, by selecting the entity from the Customization home page and then the Fields tab.
Clicking on the field name’s hyperlink displays some of the properties you can access and change using JavaScript. The most important property is the field name—in this case, "comp_relationship"—that enables you to access the field and its associated properties in code.

In addition, you can define access rights to a field using the Field Security feature, which you select from the Fields tab for an entity.

The Modify Field Security Screen allows you to use check boxes to indicate whether particular security types (an individual user, a team, a security profile, or "Everyone") has read/write access to a field.

The JavaScript code written by an administrator cannot grant either read or write access to a user if it is denied on this screen.

Field-level scripts should use a single quoted character (') instead of a double quoted character ("). For example, case_channelid=rec('user_primarychannelid'); instead of case_channelid=rec("user_primarychannelid");. Double quoted characters (") in field-level scripts may cause issues when installing scripted components.

### Create script examples

#### Example 1

You can add a Create Script, which automatically sets the Company Status to None when a user, whose Primary Team is Direct Sales, creates a new company. You must attach Create Scripts to the field that they are to act on.

1. Click <My Profile> | Administration | Customization | Primary Entities | Company.
2. Click the Screens tab. A list of customizable screens for the Company entity is displayed.
3. Click the Company Entry Screen.
5. Enter the following script into CreateScript. This script assumes that the primarychannelid (primary team id) for the Direct Sales team is equal to 1.

   ```javascript
   if (CurrentUser.user_primarychannelid==1) {
   >DefaultValue='None';
   }
   ```

   **Note:** The DefaultValue property can only be set when a new record is created, or in a field created by a workflow action.

6. Click Update and then click Save.
7. Log off and back on as any user whose Primary Team is Direct Sales. Note that you do not need to log off for the script to be activated, but you need to be in the Direct Sales team to see the effect.
8. Select New to create a new company. Status is automatically set to None.

#### Example 2
This example adds a Create Script, which automatically sets a new company type to Competitor and makes this field read only when William Dolan (DolanW) creates the company.

1. Click the Company Entry Screen.
2. Highlight **Company:Type**.
3. Enter the following script in **CreateScript**:

   ```
   if(Values("Act")==1200)
   {
   if(CurrentUser.user_logon=='DolanW')
   {
   DefaultValue='Competitor';
   ReadOnly=true;
   }
   }
   ```

   **Note:** The "if (Values("Act")==1200)" statement checks that the System Action is being used. This is required to make the script apply during insertion only. Without this statement, the script will work for updates, which means that the field in the screen is always locked down as read only for the user. This script assumes that deduplication is enabled. Check in **<My Profile> | Administration | System | System Behavior** that Deduplication is set to **Yes**.

4. Click **Update** and then click **Save**.
5. Log on as William Dolan. When you create a new company, the Type field is automatically set to Competitor and is read only.

**Example 3**

This example adds a Create Script, which removes the Archive selection item from the Company Status list when the System Administrator (Admin) creates a new company.

1. Click **Company Entry Screen**.
2. Highlight **Company: Status**.
3. Enter the following script in **CreateScript**:

   ```
   if(CurrentUser.user_logon=='Admin')
   {
   RemoveLookup('Archive');
   }
   ```

4. Log in as the system administrator. When you create or update a new company, the Archive option is no longer available on the Status list.
Note: The scripts in Examples 2 and 3 work in conjunction with whatever access settings may have been defined in the Field Security interface because in both cases the scripts are restricting access to the fields rather than widening it. In contrast, a script that specifies write access to a field depending on the user's ID will not take effect if that user has already been denied access in the Field Security interface.

**OnChange script examples**

**Example 1**

You can add an OnChange Script, which changes the Team assigned to an Opportunity depending on the type of opportunity. You must attach the OnChange Script to the field that you want to change.

1. Click <My Profile> | Administration | Customization | Primary Entities | Opportunity.
2. Click the Screens tab.
3. Click the pencil icon beside Opportunity Detail Screen.
4. Highlight Opportunity: Type within the Screen Contents panel.
5. Type the following script in OnChangeScript. The first part of the script checks to see if the channelid field is present on the screen.

   ```javascript
   if(typeof(oppo_channelid)!='undefined')
   {
   if(oppo_type.value=='Mix')
   {
   oppo_channelid.value='4'
   }
   else if(oppo_type.value=='Consulting')
   {
   oppo_channelid.value='3'
   }
   else
   {
   oppo_channelid.value='2'
   }
   }
   ```

6. Click Update and then click Save.
7. Add a new opportunity and select Consulting from Type. A team value, in this case Customer Service, automatically fills the Team field. If you change the opportunity type to Mix, a different team value, in this case Marketing automatically fills the Team field.

**Example 2**

You can add an OnChange Script, which changes the company status to Inactive when the company type is changed to Partner. You can use "this.value" in place of the actual field name when the script is being attached to the actual field that is changing.
1. Click the **Company Entry Screen**.

2. Highlight **Company: Type** and enter the following in **On Change Script**. When you create or edit a company type and change the company type to Partner, the **Status** field automatically defaults to Inactive.

   ```javascript
   if(this.value == 'Partner')
   {
   comp_status.value = 'Inactive'
   }
   ```

**Example 3**

You can add an OnChange Script, which disables the **Company Revenue** field when the **Company Type** is set to **Partner**.

1. Click the **Company Entry** Screen.

2. Highlight **Company: Type**.

3. Enter the following script in **On Change**:

   ```javascript
   if (this.value == 'Partner')
   {
   comp_revenue.disabled='true';
   }
   ```

4. Click **Update** and then click **Save**.

5. Open a company and change the type to **Partner**. The **Company Revenue** field is disabled.

**Example 4**

You can add an OnChange Script, which hides the company revenue field for companies with more than 500 employees. This example also shows how you can use the visibility property of the HTML DOM.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Company | Screens**.

2. Click the Company Entry Screen.

3. Highlight **Company: Employees**.

4. Enter the following script in **On Change Script**.

   ```javascript
   if(this.value =='501+')
   {
   comp_revenue.style.visibility = 'hidden';
   }
   else comp_revenue.style.visibility = 'visible'
   ```

5. Click **Update** and then click **Save**. When you create a new company and select 501+ from the Employees list, the **Revenue** field is automatically hidden. The above script hides the **Revenue** (comp_revenue) field when the user selects 501+. It will not be run if the field is already set to 501+.

6. To make this customization complete, you can add a Create script to the comp_revenue as follows, and the field then remains hidden:

   ```javascript
   if (Values('comp_revenue')=='501+')
   ```
Validate script examples

Example 1

This example adds a Validate Script, which checks the validity of the Opportunity Certainty field. If the field value is set to less than 25%, it expects the Opportunity Priority to be set to Low. If this is not the case, a validation error message is displayed to the user.

**Note:** You must attach Validate Scripts in the field you want the valid error to show up against.

1. Click <My Profile> | Administration | Customization.
2. Select Opportunity Progress from Secondary Entities.
3. Click the Screens tab.
4. Click Opportunity Status Box.
5. Select OpportunityProgress: Priority in the Screen Contents panel.
6. Type the following script in Validate Script.

   ```java
   if (Values('oppo_certainty')<25
   && Values('oppo_priority')!='Low')
   {
     Valid=false;
     ErrorStr="please set the priority to Low";
   }
   ```

7. Click Update and then click Save.
8. Add a new opportunity, set the Priority to 20 and click Save. A validation error is displayed to the user with the error you specified.

Example 2

You can add a Validate Script, which validates that every customer who is buying a License is assigned a Customer Reference ID that begins with the letter 'L'. Otherwise it displays an error message.

1. Click <My Profile> | Administration | Customization | Primary Entities | Opportunity, and click the Screens tab.
2. Click Opportunity Detail Screen.
4. Enter the following script in ValidateScript:

   ```java
   custref=Values('oppo_customerref')+'';
   if ((Values('oppo_type')=='License'))
&& (custref.charAt(0)!='L'))
{
  ErrorStr='!'+custref+'The customer reference must begin with L';
  Valid=false;
}

5. Click **Update** and then click **Save**.

6. Create a new opportunity, select **License** from **Type**, enter a customer reference number beginning with any letter except L.

7. Click **Save**. The error displayed indicates that this type of opportunity must be assigned a customer reference beginning with L.

---

### Lists

- Adding a new column to a list or grid
- Editing a list or grid layout
- Advanced list customization
- Adding a Create script to a list or grid
- Adding custom content to a grid or list
- List Definition fields

### Adding a new column to a list or grid

You can customize lists and grids.

- Lists are displayed when you select a tab within the context of company, case, lead, opportunity, solution, or person.
- Grids are displayed as the results of a search for a person, lead, case, or opportunity, and so on. The lists displayed on the Company Quick Look tab are also grids.

This example adds the Team field as a new column to the Communication list.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | Lists**.
2. Click the pencil icon in the **Customize** column beside **Communication List**.
3. Select **Communication: Team** from the **Field** list.
4. Enter the list properties and click **Add**. For more information, see **List Definition fields**. The new column appears in **List Contents**.
5. Highlight the new column and reposition it using the up and down arrow buttons.
6. Click **Save**. The new column is displayed on any company’s Communications list.
Editing a list or grid layout

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity> | Lists.
2. Click the pencil icon in the Customize column beside the list or grid that you want to edit.
3. Choose a column in the List Contents list, and use the up and down arrows to reposition it.
4. To specify that the user can order the list on this column, set Allow Order By to Yes.
5. Click Update.
6. Click Save.

Advanced list customization

You can attach Create Scripts to individual columns on grids. The script is run on the server when the list is being created. As with Create Scripts used in Advanced Screen Customization, all of the CRM Object Model properties and methods (current context) can be accessed. Moreover, the CurrentUser object and Value property (the value the user is submitting) can be accessed.

The following grid column properties can be accessed with Create Scripts:

- Visible ( )
- Alignment ( )
- AllowOrderBy ( )
- CustomActionFile ( )
- CustomIdField ( )
- JumpEntity ( )
- ShowHeading ( )
- ShowSelectAsGif ( )

You can attach HTML and JavaScript content to an entire list or grid (as opposed to a column) in the Custom Content field.

Adding a Create script to a list or grid

This example adds a Create Script to the Opportunity List, which hides the Company Name column if the company context is present.

1. Click <My Profile> | Administration | Customization | Primary Entities | Opportunity.
2. Click the Lists tab.
3. Select the Opportunity List hypertext link.
4. Click the column that you want to attach the Create Script to, in this example Company: Company Name.

5. Add the following Create Script to **Create Script** and click **Update**.

   ```javascript
   if(CRM.GetContextInfo("company","comp_name"))
   {
   Visible = false;
   }
   ```

6. Click the **Opportunities** tab in the context of a company. The Company Name column is no longer visible.

7. Click **My CRM | Opportunities**. The Company Name column is still visible.

**Adding custom content to a grid or list**

This example shows how to add highlighting to a list of quotes returned from a search. The highlight is applied to different parts of the grid depending on the quote value being over 1000, 10000, and where the quote is active.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Quotes | Lists | Quotes Grid**.

2. Add the following script in **Custom Content**.

   ```html
   <script>
   crm.ready(function()
   {
   crm.grids('0').rows(':gt(0)',true)
   .filterWhere('quot_grossamt','ge','1000')
   .highlightCell('yellow');

   crm.grids('0').rows(':gt(0)',true)
   .filterWhere('quot_grossamt','ge','10000')
   .highlightCell('#E8D7FD');

   crm.grids('0').rows(':gt(0)',true)
   .filterWhere('quot_status','eq','Active')
   .highlightCell('green');
   });
   </script>
   ```

3. **Save**. When you search for a quote, the resulting list shows different highlighting on the list items.

**List Definition fields**

The table below explains the fields on the right-hand side of the List Definition page.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>The field that the column contains.</td>
</tr>
<tr>
<td>Allow Order By</td>
<td>Allows the user to sort the list by this column. The column header appears underlined. An arrow next to the column header indicates this is the current sort order of the list.</td>
</tr>
<tr>
<td>Hyperlink To</td>
<td>Allows the user to link to another screen.</td>
</tr>
<tr>
<td>Order By Desc</td>
<td>Allows ordering from Z - A or 9 - 0.</td>
</tr>
<tr>
<td>Alignment</td>
<td>Alignment of the column, Left, Center, Right.</td>
</tr>
<tr>
<td>Show Heading</td>
<td>Displays the field name as the column heading.</td>
</tr>
<tr>
<td>Show Select As Gif</td>
<td>Displays the icon instead of the description (for predefined drop-down lists only).</td>
</tr>
<tr>
<td>Default Order By</td>
<td>The first column in a grid that has 'Default Order By' set to Yes controls the order in which records are shown the first time the grid is displayed. For example, if you set Default Order By to Yes for oppo_type on the Opportunity Grid, and the user clicks the Search arrow and clicks Opportunity, the displayed grid is ordered by oppo_type.</td>
</tr>
<tr>
<td>Create Script</td>
<td>Allows you to enter scripts that are run on the server when the list or grid is created. See Advanced list customization for more information.</td>
</tr>
<tr>
<td>Custom Content</td>
<td>Generic JavaScript or HTML, and/or Sage CRM’s Client-Side API library of functions can be used here. For more information, see Advanced screen customization.</td>
</tr>
</tbody>
</table>

**Tabs**

- Adding a new tab
- Changing the ordering in a tab group
- Removing a tab from a tab group
- Editing system menu tab groups
- Tab customization actions
- Tab Properties fields
Adding a new tab

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>.
2. Click the Tabs tab.
3. Click the pencil icon in the Customize column beside the tab group name.
4. Select the type of information that will be displayed on the tab from System Act. For more information, see Tab customization actions.
5. Enter the new tab name in Caption.
6. Complete the Tab Properties fields.
7. Click Add and click Save. The new tab is displayed in the context of the entity.

Changing the ordering in a tab group

You can customize tabs for primary and secondary entities. To change the order of tabs in a tab group:

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity>.
2. Click Tabs.
3. Click the pencil icon in the Customize column beside the tab group you want to reorder.
4. Choose the tab you want to reposition in Tab Group Contents and use the up and down arrows to move the tab.
5. Click Update and Save.

 Removing a tab from a tab group

You can customize tabs for primary and secondary entities. To remove a tab from a tab group:

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity>.
2. Click Tabs.
3. Click the pencil icon in the Customize column beside the tab group you want to edit.
4. Choose the tab you want to delete in Tab Group Contents.
5. Click Delete and Save.

Editing system menu tab groups

The System Menu administration area contains a tab group for each Administration homepage, and the Administration main menu.
1. Click <My Profile> | Administration | Advanced Customization | System Menus.
2. Click the pencil icon in the Customize column beside the tab group you want to change.
   - Main Menu drives the buttons that appear on the right-hand side of the screen including Find, New, and Log Off.
   - User includes the tabs displayed within the My CRM context.
   - Channel includes the tabs displayed within the Team CRM context.
   - Reports includes the report categories available from Reports.
   - Groups that correspond to the tabs within individual administration areas. For example, the EntityTabs tab group contains the standard tabs that are displayed in <My Profile> | Administration | Customization when you select an entity to customize it. These tabs are Fields, Screens, Lists, Tabs, Blocks, TableScripts, and Views.
3. Make the changes you require, such as Removing a tab from a tab group or Changing the ordering in a tab group.
4. Click Save.

You can customize Button Groups in <My Profile> | Administration | Advanced Customization if you have the Extensibility Module. For more information, see the Developer Help on the Sage CRM Help Center.

### Tab customization actions

To choose the type of screen that’s displayed when a user selects a tab, select an action from System Act (on the Customize Tabs screen) when you create the tab. Note that if you have the Extensibility Module you will first need to select Other from the Action field before these System Actions are displayed. Screens include standard Sage CRM screens and lists, and screens you created in <My Profile> | Administration | Customization. If you have the Extensibility Module you can even display Web pages or custom files you created using ASP pages. For more information, see the Developer Help on the Sage CRM Help Center.

It is important that you review all the System Actions available to you. Selecting certain actions saves you the time and effort of creating an ASP page each time you want to run a standard Sage CRM screen or list.

Each option in the list corresponds to a standard Sage CRM screen, list, or screen area except customfile and customurl, which display custom files and Web pages, respectively.

- List actions
- Related List actions
- Summary actions
- Entry actions
- Edit and Progress actions
- Find actions
- Tab actions
- Other actions
List actions

Use List actions to display lists from a tab. In most cases, the action name is intuitive. For example, addresslist displays a list of addresses, caselist displays a list of cases, and leadlist displays a list of leads. Displayed lists are associated with the entity in which the tab was created. So if you add addresslist to the Person tab group, the displayed list contains People addresses. However, if you add addresslist to the Cases tab group, the list is blank because address are not typically linked to cases.

Related List actions

Related List actions preceded the Related Entities functionality. Most Related List actions are not used in the standard system. They remain to ensure that customized systems that use them can upgrade successfully. If your system currently uses Related List actions, consider migrating to the Related Entities functionality after upgrading to 6.2 or above. For more information, see Adding new relationship types.

Use Related List actions to establish relationships between entities. You can add a new tab to any entity and build a list of related cases, communications, companies, opportunities, or people.

Available Related List actions are outlined below:

- relatedcaselist—not used in the system.
- relatedcommunicationlist—not used in the system.
- relatedcompanieslist—not used in the system.
- relatedopportunitieslist—not used in the system.
- relatedpersonlist—used in the Communications tab group’s Related Person tab.

Summary actions

Use Summary actions to build a screen that displays a summary of the call, case, communication, company, lead, opportunity, person, SLA, solution, wave, or waveitem. For example, callsummary displays a summary of calls.

Entry actions

Use Entry actions to build a screen that displays an entry screen from which you can create a new call, case, communication, company, lead, opportunity, person, SLA, solution, wave, or waveitem. For example, newcommunicationedit displays the New Communication Edit tab. Users typically click a New button to view any an entry screen.

Edit and Progress actions

Use Edit actions to build a screen that displays an edit screen from which users can make changes to a case, leads, opportunities. Use Progress actions to allow users to progress cases, leads and opportunities
to the next Stage in their life cycle, making changes to details if required. For example, communicationedit displays the Details tab for a communication.

- editcommunication—Not used in the system but works in the same way as communicationedit.
- lead progress—Not used in the system.
- oppoprogress—Not used in the system.

**Find actions**

Use Find actions to build a screen that displays a Find screen from which users can search for cases, communications, companies, leads, opportunities, people, and solutions. For example, casesearch displays a Find Case tab. Users typically click a **Find** button and a context to perform a search within the system.

**Tab actions**

Use Tab actions to display screen areas. For example, casesolutionstab displays the Solution tab for a Case.

**Other actions**

Use other actions to build screens.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>campaign report</td>
<td>Displays a campaign’s report.</td>
</tr>
<tr>
<td>companymarketing</td>
<td>Displays the company marketing screen.</td>
</tr>
<tr>
<td>companyorgchart</td>
<td>Not used in the system but can be used to display a company organizational chart.</td>
</tr>
<tr>
<td>componentadd</td>
<td>Not used in the system but can be used to display the Component Manager screen for adding new components.</td>
</tr>
<tr>
<td>componentinstall</td>
<td>Not used in the system but can be used to display the Component Manager screen for installing components.</td>
</tr>
<tr>
<td>componentscript</td>
<td>Not used in the system but can be used to display the Component Manager screen for scripting components.</td>
</tr>
<tr>
<td>Key Attributes</td>
<td>Displays a screen with dynamic data.</td>
</tr>
<tr>
<td>exclude</td>
<td>Displays the Exclude from Call List outbound call handling screen.</td>
</tr>
<tr>
<td>gotthrough</td>
<td>Displays the Contact Introduction outbound call handling screen.</td>
</tr>
<tr>
<td>grouplistbrowser</td>
<td>Displays records listed in a Groups screen.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>logout</td>
<td>Displays the Logout screen.</td>
</tr>
<tr>
<td>makecalls</td>
<td>Display the Introduction outbound call handling screen.</td>
</tr>
<tr>
<td>myeware</td>
<td>Displays the Dashboard screen.</td>
</tr>
<tr>
<td>personcampaign</td>
<td>Not used in the system but can be used to display a list of campaigns related to a person.</td>
</tr>
<tr>
<td>personmarketing</td>
<td>Displays marketing information for a person.</td>
</tr>
<tr>
<td>phoneemail</td>
<td>Displays a person or company phone/email list.</td>
</tr>
<tr>
<td>quicklook</td>
<td>Not used in the system but can be used to display the person or company quick look screen, depending on the context you add it to.</td>
</tr>
<tr>
<td>replacecall</td>
<td>Displays the Replace call outbound call handling screen.</td>
</tr>
<tr>
<td>reportexecute</td>
<td>Runs a report.</td>
</tr>
<tr>
<td>territoryadmin</td>
<td>Not used in the system but can be used to display the Territory Administration area.</td>
</tr>
<tr>
<td>territoryprofiles</td>
<td>Not used in the system but can be used to display the Security Profiles area.</td>
</tr>
<tr>
<td>transfercall</td>
<td>Not used in the system but can be used to display the Transfer Call Outbound Call Handling screen.</td>
</tr>
<tr>
<td>userprefs</td>
<td>Displays the Preferences screen.</td>
</tr>
<tr>
<td>workflowlist</td>
<td>Displays a list of available workflows.</td>
</tr>
<tr>
<td>workflowrules</td>
<td>Displays a list of available workflow rules.</td>
</tr>
</tbody>
</table>

### Tab Properties fields

The following table describes the fields on the **Properties** panel of the **Tabs** page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>The tab name of the tab.</td>
</tr>
<tr>
<td>Action</td>
<td>Only displayed if you have the Extensibility Module. Select Other from this field in order to display the list of system actions.</td>
</tr>
<tr>
<td>System Act</td>
<td>See Tab customization actions.</td>
</tr>
</tbody>
</table>
Enter SQL in this field to restrict use of the tab. You can restrict tabs to specified users or groups of users. For example, user_userid=4 or user_userid=5 to restrict the tab to certain users.

Don’t use this format to restrict several tabs because the database is queried separately for each restricted tab.

Instead, use the following script to query Sage CRM:

U:4,5—to limit the tab to users whose ID is 4 or 5, for example.
C:4,5—to restrict the tab to certain teams, for example teams with a Channel ID of 4 or 5.
T:— to restrict the tab to territories, using the Territory ID (terr_territoryid). For example: T: -2097151993

You can also restrict the availability of the tab so that it only appears when the company is a customer:

comp_type = 'Customer'

As you are not limited to data in the current context, this clause can be entered in the User tab group. It hides the Opportunity tab unless the user has any Opportunities assigned to them:

exists (select * from opportunity where oppo_assigneduserid = user_userid)

If you’re creating a button that links to a custom page, select a GIF from the list. If you have created your own graphic using a GIF editor, copy it to the ...\wwwroot\Img\Menu directory so that it is displayed as one of the choices.

Select Yes or No from the Sensitive tab to restrict the tab to specific users.

Views

- Introduction to view customization
- Creating a view
- Editing a view
- Deleting a view
- Tips and troubleshooting

Introduction to view customization

In relational databases, a view enables you to create a virtual table that represents the data in one or more tables in an alternative way. Sage CRM employs views to return records in response to user searches and
to present relationships between different entities. For example, a view might list all the cases associated with a particular company that are assigned to a specific user. Creating advanced user-defined views entails administrators employing SQL operations such as Joins, and therefore requires basic SQL scripting skills.

You can view, update, create, and delete database views by selecting <My Profile> | Administration | Customization, choosing an entity that the view belongs to, and then clicking the Views tab. You need to exercise caution if you are editing or deleting existing views. Remember that changing or deleting a view may affect several areas of Sage CRM.

In addition, it is strongly recommended that you create new views within the Sage CRM system rather than using a database tool, such as SQL Server's Enterprise Manager, for example. Building a view outside the system requires an update of the metadata table Custom_Views so that Sage CRM can "pick up" the new view and list it in the interface. To access and update metadata tables directly in the context of Sage CRM is analogous to changing Windows Registry settings manually—a procedure to be undertaken with caution and only by advanced administrators.

**Note:** When creating a new or modifying an existing view any SELECT statements on primary entities in a view must also retrieve the _secterr, _assigneduserid (or equivalent), and _channelid (or equivalent) column for each primary entity referenced in that view. This can be done by selecting the column explicitly, for example select comp_name, comp_companyid, comp_secterr, comp_primaryuserid, comp_channelid from Company, or by selecting all columns from the primary entities in question. Failure to ensure this may result in SQL errors in the Sage CRM user interface when the view is executed. All "out-of-the-box" Sage CRM views already contain the appropriate _secterr, _assigneduserid (or equivalent), and _channelid (or equivalent) columns. A message to this effect is displayed when you add a new or change an existing view.

To customize views you need:

- Experience of SQL views, tables, databases, and data relationships.
- A backup of your system. Please make sure you have a backup of any system views you customize as these may be overwritten on upgrade.
- Ideally, a test system to test your view customizations before implementing them on your live system.

**Creating a view**

The following examples show you how to create the most common types of new view:

- Creating a view for reports
- Creating a view for a group
- Creating a view for Keyword Search
- Creating a view for Advanced Find
- Creating a view for SData access

**Creating a view for reports**

This example creates a new view for the Cases table that can be used in reports.
1. Click <My Profile> | Administration | Customization | Primary Entities | Cases | Views. The names of the columns that you can include from the Cases table in a new view are displayed. The fields tab for the Company or Person tables, lists the fields that can be called from those tables. In addition to the fields shown in the interface, each table has a hidden unique identifier that's used for SQL joins. Each table exists in relationships and foreign keys exist to link the tables with each other. You need this information to build joins between tables. For more information, see the tables below.

2. Click New and enter the View Name.

3. Name the view starting with "v", with a single word and no spacing. For example, vSimpleCaseView. The View Script field is automatically populated with the start of the script.

4. To make the view available when creating a new report, select Reports View.

5. Enter a short description in Description.

6. Enter a translation for the view in Translation. This is displayed on screen when the user selects the view.

7. Enter SQL for the new view. For example, change the existing:

   ```sql
   CREATE VIEW vSimpleCaseView
   AS
   SELECT *
   FROM CASES
   ```

   to:

   ```sql
   CREATE VIEW vSimpleCaseView
   AS
   SELECT comp_name, comp_status, comp_type, case_description, pers_firstname, pers_lastname, case_secterr, comp_secterr, pers_secterr, comp_primaryuserid, comp_channelid, pers_primaryuserid, pers_channelid, case_assigneduserid, case_channelid FROM company INNER JOIN cases ON comp_companyid = case_primarycompanyid INNER JOIN person ON case_primarypersonid = pers_personid
   ```

   The columns in the SELECT statement are available in the report. If you're familiar with SQL, you can concatenate fields and use functions on the data to manipulate the data further.

8. Click Save.

9. Click Reports on the Main menu and click Customer Service.

10. Click New and select the new view from Source View. The fields that you made available in the view are listed in Select Column and you can use them to create a new report.
<table>
<thead>
<tr>
<th>Table</th>
<th>Unique ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>case_caseid</td>
</tr>
<tr>
<td>Opportunity</td>
<td>oppo_opportunityid</td>
</tr>
<tr>
<td>Company</td>
<td>comp_companyid</td>
</tr>
<tr>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Order</td>
<td>Orde_OrderQuoteID</td>
</tr>
<tr>
<td>Quote</td>
<td>Quot_OrderQuoteID</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Child Table</th>
<th>Foreign Key</th>
<th>Parent Table</th>
<th>Unique ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>case_primarycompanyid</td>
<td>Company</td>
<td>comp_companyid</td>
</tr>
<tr>
<td>Cases</td>
<td>case_primarypersonid</td>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Cases</td>
<td>case_assigneduserid</td>
<td>User</td>
<td>user_userid</td>
</tr>
<tr>
<td>Company</td>
<td>comp_primarypersonid</td>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Company</td>
<td>comp_primaryaddressid</td>
<td>Address</td>
<td>addr_addressid</td>
</tr>
<tr>
<td>Company</td>
<td>comp_primaryuserid</td>
<td>User</td>
<td>user_userid</td>
</tr>
<tr>
<td>Person</td>
<td>pers_companyid</td>
<td>Company</td>
<td>comp_companyid</td>
</tr>
<tr>
<td>Person</td>
<td>pers_primaryaddressid</td>
<td>Address</td>
<td>addr_addressid</td>
</tr>
<tr>
<td>Person</td>
<td>pers_primaryuserid</td>
<td>User</td>
<td>user_userid</td>
</tr>
<tr>
<td>Opportunity</td>
<td>oppo_primarycompanyid</td>
<td>Company</td>
<td>comp_companyid</td>
</tr>
<tr>
<td>Opportunity</td>
<td>oppo_primarypersonid</td>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Opportunity</td>
<td>oppo_assigneduserid</td>
<td>User</td>
<td>user_userid</td>
</tr>
<tr>
<td>Orders</td>
<td>orde_contactid</td>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Orders</td>
<td>orde_opportunityid</td>
<td>Opportunity</td>
<td>oppo_opportunityid</td>
</tr>
<tr>
<td>Orders</td>
<td>orde_associatedid</td>
<td>Quotes</td>
<td>quot_orderquoteid</td>
</tr>
<tr>
<td>Quotes</td>
<td>quot_contactid</td>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Quotes</td>
<td>quot_opportunityid</td>
<td>Opportunity</td>
<td>oppo_opportunityid</td>
</tr>
<tr>
<td>Quotes</td>
<td>quot_associatedid</td>
<td>Orders</td>
<td>orde_orderquoteid</td>
</tr>
</tbody>
</table>

Custom Edits and Custom Captions
You can add a field to your view which is derived or calculated, for example:

```sql
select rtrim("pers_firstname") +'
' +rtrim(pers_lastname) as
"pers_fullname", ...... from person;
```

To control how the field appears in reports, ensure the field is described in the meta data tables, custom_ edits and custom_captions. Create an extra field on the main table of the view. In the example above, create a new field on the person table called pers_fullname. You don't hold data in the field, but by creating the field with the same name as your derived field you create the meta data for it. You can then easily control the fields display properties and captions used in screens.

**Creating a view for a group**

When creating a view for a group, you must include unique identifier fields. For example, to make the view available for a group of company records, include the company unique identifier in the view. To make the view available for a group of case records, include the case unique identifier in the view. The same applies to leads, opportunities, and people.

This table shows the unique identifiers for different groups.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Unique Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case</td>
<td>case_caseid</td>
</tr>
<tr>
<td>Company</td>
<td>comp_companyid</td>
</tr>
<tr>
<td>Lead</td>
<td>lead_leadid</td>
</tr>
<tr>
<td>Opportunity</td>
<td>oppo_oppoid</td>
</tr>
<tr>
<td>Person</td>
<td>pers_personid</td>
</tr>
<tr>
<td>Orders</td>
<td>orde_orderquoteid</td>
</tr>
<tr>
<td>Quotes</td>
<td>quot_orderquoteid</td>
</tr>
</tbody>
</table>

This example make a new case view available for use when creating company and person groups.

1. Click `<My Profile>` | Administration | Customization | Primary Entities | Cases | Views.
2. Click the view you want to change. For example, `vSimpleCaseView`.
3. Click **Change** and select **Groups View**.
4. Add the person and company unique identifiers in **View Script** and click **Save**.

```sql
CREATE VIEW
vSimpleCaseView
AS
SELECT case_caseid, comp_companyid, comp_name, comp_status, comp_
```
type, case_description, pers_personid, pers_firstname, pers_lastname, case_secterr, comp_secterr, pers_secterr, comp_primaryuserid, comp_channelid, pers_primaryuserid, pers_channelid, case_assigneduserid, case_channelid
FROM company
INNER JOIN cases
ON comp_companyid = case_primarycompanyid
INNER JOIN person
ON case_primarypersonid = pers_personid

5. Click **My CRM | Groups** and click **New Group**.
6. To enable this group to use the newly created view, select a name from **Entity**. In this instance, it’s Cases.
7. **Source View** lists all views associated with the Case entity. Select **vSimpleCaseView**.
8. Complete the remaining fields and click **Continue**.

**Creating a view for Keyword Search**

A user can specify the entities on which a Keyword Search is performed. Keyword Search uses an *any words* search technique. This returns records containing all words listed in a search term if the words appear in the record text fields or in the text fields of any associated entity record specified in the Keyword Search view.

The following table lists predefined Keyword Search views.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Unique Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case</td>
<td>vKeywordSearchListCases</td>
</tr>
<tr>
<td>Company</td>
<td>vSearchListCompany</td>
</tr>
<tr>
<td>Lead</td>
<td>vKeywordSearchListLead</td>
</tr>
<tr>
<td>Opportunity</td>
<td>vKeywordSearchListopportunity</td>
</tr>
<tr>
<td>Person</td>
<td>vSearchListPerson</td>
</tr>
<tr>
<td>Communication</td>
<td>vSearchListCommunication</td>
</tr>
<tr>
<td>Orders</td>
<td>vOrders</td>
</tr>
<tr>
<td>Quotes</td>
<td>vQuotes</td>
</tr>
</tbody>
</table>

You can specify only one Keyword Search view per entity to avoid returning the same record twice in a single set of search results. You can edit an existing Keyword Search view. For more information, see **Editing a view**.

To create a Keyword Search view for a custom entity:
Creating a view for Advanced Find

Users can use Advanced Find to perform complex database searches across cases, communications, companies, leads, opportunities, orders, people, quotes, and solutions. You can create enhanced searches based on a WHERE clause, and you can extend the selection criteria using AND and OR clauses.

To create an Advanced Find view for a custom entity:

1. Click <My Profile> | Administration | Customization | <Entity>.
2. Click the Views tab and click New.
3. Enter a view name in View Name and move the cursor to another field. The start of the script is automatically added to View Script.
4. Enter a short description of the view in Description.
5. Select Groups View.
6. Enter a translation for the view in Translation.
7. Enter SQL in View Script. The SQL below creates a view called vSearchListproject for a custom entity called Project.

```sql
CREATE VIEW vSearchListproject
AS

SELECT RTRIM(ISNULL(Pers_FirstName, '')) + ' ' + RTRIM(ISNULL(Pers_LastName, '')) AS Pers_FullName,
RTRIM(ISNULL(Pers_PhoneCountryCode, '')) + ' ' + RTRIM(ISNULL(Pers_PhoneAreaCode, '')) + ' ' +
RTRIM(ISNULL(Pers_PhoneNumber, '')) AS Pers_PhoneFullNumber,
```

Tip: When creating a Keyword Search view, you must include fields that allow security policies to work. For example, a Keyword Search view on Person should include pers_primaryuserid and pers_secterr. You should also include fields from other tables that complete the business object. For example, a Keyword Search view on Person should include fields from the Person, Company, Address, Phone, and Email tables.
RTRIM(ISNULL(Pers_FaxCountryCode, '')) + ' ' + RTRIM(ISNULL(Pers_FaxAreaCode, '')) + ' ' +
RTRIM(ISNULL(Pers_FaxNumber, '')) AS Pers_FaxFullNumber,
Project.*, vCompanyPE.*, vPersonPE.*
FROM Project
LEFT OUTER JOIN vCompanyPE ON Proj_CompanyId = Comp_CompanyId
LEFT OUTER JOIN vPersonPE ON Proj_PersonId = Pers_PersonId
WHERE Proj_Deleted IS NULL

8. Click Save.

Next, you must add the translations to the custom_edits metadata table so the custom entity is included on the Advanced Find screen. The steps below add translations for a custom entity called Project.

1. Click <My Profile> | Administration | Customization | <Entity> | Translations.
3. Add AdvFindEntities in Caption Family.
4. Add Choices in Caption Family Type.
5. Add Project in US Translation.
6. Add Project in UK Translation.
7. Click Save.

Creating a view for SData access

SData (Sage Data) is a Sage Standard which enables desktop, server, and web-based Sage applications to communicate with each other as well as third-party applications and the Web. SData is built on top of leading industry standards including HTTP, XML, REST, and Atom/RSS.

In Sage CRM SData "feeds" can be consumed in a read-only format by Sage CRM via the Interactive Dashboard and by third-party applications.

The view in this example includes a derived field, oppo_daysopen, to show how long an opportunity has been open. When created as an SData view, this can easily be made available to the users via the Interactive Dashboard. The SData view could also be used by a third-party application which supports SData feeds.

Note: SData views are not affected by the SData setting on the External Access tab. In this example, the Read-only SData setting on the <My Profile> | Administration | Customization | Primary Entities | Opportunity | External Access tab can be set to Yes or No. The view is still available for access.
1. Click <My Profile> | Administration | Customization | Primary Entities | Opportunity | Views.
2. Click New.
3. Type in the View Name, for example vOppoDatesOpen.
4. Select SData View.
5. Type in a short description of the view in Description.
6. Type in a translation for the view in Translation.
7. Type in the SQL for the new view. For example, change the existing:

   CREATE VIEW vOppoDatesOpen
   AS
   SELECT *
   FROM OPPORTUNITY

to:

   CREATE VIEW vOppoDatesOpen
   AS
   SELECT RTRIM(ISNULL(Pers_FirstName, '')) + ' ' +
   RTRIM(ISNULL(Pers_LastName, ''))
   AS Pers_FullName, Pers_PersonId, Pers_CreatedBy, Pers_SecTerr, Pers_
   PrimaryUserId, Pers_ChannelId, Pers_EmailAddress, Comp_Name, Comp_
   CompanyId, Comp_CreatedBy, Comp_SecTerr, Comp_PrimaryUserId, Comp_
   ChannelId, Chan_ChannelId, Chan_Description, Comp_EmailAddress,
   datediff(day, getdate(), oppo_opened) as oppo_daysopen, Opportunity.*,
   (COALESCE(Oppo_Forecast, 0) * COALESCE(Oppo_Certainty, 0)) / 100 AS
   Oppo_Weighted FROM Opportunity
   LEFT JOIN Person ON Pers_PersonId = Oppo_PrimaryPersonId
   LEFT JOIN Company ON Comp_CompanyId = Oppo_PrimaryCompanyId
   LEFT JOIN Channel ON Oppo_ChannelId = Chan_ChannelId
   WHERE Oppo_Deleted IS NULL
8. Click Save.
9. To test the view on the Interactive Dashboard, click My CRM | Dashboard, and make sure you have a dashboard open.
10. Click Modify Dashboard | Add New Gadget | SData Feed.
11. Select CRM SData Provider and click Next.
12. Select the new view you created, and click Next.
13. Select the columns to display on the gadget and complete the gadget wizard steps.

The SData view you created is represented in a new gadget on the user's landing page. The URL to make the view available to another application would take the following format:

http://myserver/sdata/[installname]/sagecrm/-/vOppoDatesOpen
Editing a view

There are three types of views in the system:

- **Core Views** — cannot be edited or deleted. You can review the view details if you need to.
- **System Views** — are editable, however it is not recommended for most system views as it may adversely affect system behavior. System views for Mail Merge, Group, Report and Keyword Search views are commonly edited, however extreme caution must still be exercised as changes can affect several areas of Sage CRM. An example of customizing an existing Mail Merge view is included in this section.
- **User Views** — views that you create yourself are called User Views. You can edit and delete user views.

When editing either a System View or User View, you can indicate whether to make the generated views available to Reports, Groups, and Keyword Searches by clicking the relevant check boxes. User Views can also be exposed for SData (Sage Data) access by clicking the SData View check box.

This example alters a mail merge view; it adds a new field called case_description to the case mail merge view. For this example you need to be familiar with the mail merge process and to have a document template in the Shared Templates section, marked for use in the Case context.

1. Click &lt;My Profile&gt; | Administration | Customization | Primary Entities | Cases | Views. A list of views associated with the Case context is displayed.
2. Select the vMailMergeCase view.
3. Click Change. The view is displayed in edit mode. The View Script field contains the SQL used to create the view.
4. Find Case_Caseld and add the new field after Case_Caseld. This section of the script changes from:

   ```
   Case_CaseId, Comp_CompanyId
   ```

   to:

   ```
   Case_CaseId, Case_Description, Comp_CompanyId
   ```

   **Note:** If you make a syntax mistake, you can’t save the changes.

5. Click Save.
6. Once you’ve included the case_description field in the view, you can repeat the mail merge process, and add the new merge field into the template.
Deleting a view

You can delete user views.

1. Click <My Profile> | Administration | Customization, and select the entity that the view belongs to from the Customization homepage.
2. Click the Views tab. A list of views associated with that context is displayed.
3. Select the hypertext link of the view you want to delete. The User view is displayed in view mode.
4. Click Delete to delete the view.

Tips and troubleshooting

- You can use a tool such as Query Analyzer to write SQL for your view customizations and verify that the data you want returned is what you expect. You can also copy and paste sections of SQL that you have verified into Sage CRM.
- If you are using SQL Server with Enterprise Manager, the Create View feature gives you a helpful graphical way to build SQL for a view. This SQL can then be copied and used in Sage CRM. Test the SQL on a test system first.
- SQL invalid message. If your SQL is invalid, Sage CRM will display an error message and the SQL will not get saved to the database.
- Sage CRM security (such as territories and profiles) works on top of a view. For example, data returned to you in Query Analyzer is different to data returned to the user from the customized view in Sage CRM. This is due to security restrictions applied to the results in Sage CRM.
- Do not use TOP in your view select statement.
- Using JOIN ON rather than "where primary_key = foreign_key" type syntax, is the preferred method for joining tables.

External access

- Changing external access settings
- External access fields
Changing external access settings

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | External Access.
2. Click Change.
3. Make the changes you require to External access fields.
4. Click Save.

External access fields

The table below explains the fields on the External Access tab.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only SData</td>
<td>Enabled by default. Select Yes or No to enable or disable an entity for Sage Data (SData) access. This setting exposes Sage CRM entities so that they can be read and queried by third-party applications using ATOM feed technology on the SData standard. For more information on working with SData, see the Developer Help on the Sage CRM Help Center.</td>
</tr>
<tr>
<td>Web Services</td>
<td>Enabled by default on primary entities. Select Yes or No to enable or disable an entity for Web Services access. The Enable Web Services setting accessed from &lt;My Profile&gt;</td>
</tr>
</tbody>
</table>

Summary reports

- Introduction to summary reports
- Customizing summary report header content
- Customizing summary report list output
Introduction to summary reports

You must be a System Administrator or an Info Manager with Info Admin Summary Reports rights to customize summary reports.

Summary reports show a quick overview of customer information. They are available from the Summary tabs of:

- Companies
- People
- Opportunities
- Cases

A summary report is made up of two customizable areas:

- **Header content** is summary information from the current entity. For example, click Summary Report in the context of a Case, and the header content is made up of case summary information. To customize header content information, click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | Summary Report and click Edit Content Summary.

- **List output** is information from the entities linked to the current entity. For example, click Summary Report in the context of a Company, and the list output area contains information about related opportunities, cases, and communications. To customize list output information, click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | Summary Report and click the edit icon beside the list you want to customize.

Customizing summary report header content

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>.
2. Click the Summary Report tab.
3. Click Edit Summary Content.
4. Add, remove, or change the fields you want to display.
5. Click Save. To view the updated layout, click Summary Report on the entity Summary tab.

Customizing summary report list output

This example changes the list output of the Company Summary Report to show Communications with a Status of Pending. It also moves the Status column in the Opportunity information displayed on the report output so that it is next to the Stage column.
1. Click <My Profile> | Administration | Customization | Primary Entities | Company | Summary Report.
2. Click the pencil icon beside Communications. The Report Options, Step 1 of 2 page is displayed. For information on specifying report options, see Writing Reports in the User Guide.
3. Click Continue.
4. Select Pending from Communication - Status search criteria.
5. Click Continue and Save.
6. Click the Opportunities link to add the Opportunity Status to the report output.
7. Select Opportunity Status in the Report Contents list, and move it after the Opportunity Stage column.
8. Click Continue and then click Continue on the Search Criteria page.
9. Click Save.

Web leads

- Web leads
- Customizing the Web Lead screen
- Web to Lead configuration settings

Web leads

Sage CRM enables you to create web pages for collecting lead information simply by clicking a button. This one-click process generates the HTML to define a web form page for entering lead details. This HTML page can be inserted into a corporate web site, enabling a seamless transfer of information from a client-defined interface to the Sage CRM database.

The generated HTML contains the URL of the Sage CRM installation and defines the action to be taken when the web lead form is submitted. Therefore, although customization allows the user to add or remove fields from the form, no HTML scripting is required to make the form fully functional.

To access the Web to Lead area in Sage CRM:

1. Click <My Profile> | Administration | Customization | Primary Entities | Leads | Web to Lead.
2. Click Change, edit the default configuration settings and click Save. For more information, see Web to Lead configuration settings.
3. Click Web Lead HTML. The Web Lead HTML screen is displayed. Key material is grouped in the Create Action function. Written in JavaScript, this function indicates the Sage CRM install that receives information from the web lead form. This area is worth checking in situations when the web lead information has not successfully transferred to the Sage CRM database. It's possible that in
certain situations when an Sage CRM is reinstalled under a different name, the URL used by the HTML page generated by an earlier install is no longer valid.

4. You can copy the HTML from this screen to your corporate website so that your customers can create leads in Sage CRM through your website. The raw HTML copied from the Web Lead HTML screen creates a basic form for capturing lead information.

5. Enter test lead data and click Save And Submit.
6. Return to Sage CRM and search for the lead you added using the web page. The new lead is displayed with the Source set to Web.

**Customizing the Web Lead screen**

You can customize the fields available on the Web Lead form by customizing the standard Web Lead screen.

1. Click <My Profile> | Administration | Customization | Primary Entities | Lead | Screens.
2. Click Customize next to the WebLeadScreen.
3. You can add or remove fields in the same way as you customize any other screen in Sage CRM.
4. Click Save.
5. Click the Web To Lead tab, and click Web Lead HTML.
6. Copy and paste the new HTML to your web page. The Web Lead form is updated to include the new fields you added.

**Web to Lead configuration settings**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Lead Enabled</td>
<td>Select this check box to enable the Web to Lead functionality. When you do this Sage CRM can capture leads.</td>
</tr>
<tr>
<td>Only Accept Web Leads From The Following IP Address</td>
<td>If you want to restrict the ability to generate leads from any Web site, specify the exclusive IP address that leads can be generated from.</td>
</tr>
<tr>
<td>Web Lead Return URL</td>
<td>Specify the URL you want the user’s browser to be redirected to after the lead has been created.</td>
</tr>
</tbody>
</table>
Key attribute profiling

- Introduction to key attribute profiling
- Designing a key attribute profiling structure
- Creating a key attribute profiling category
- Defining key attribute profiling category groups
- Setting up key attribute profiling lists
- Adding fields to key attribute profiling categories
- Displaying key attribute profiling data
- Deleting a key attribute profiling category
- Recovering a key attribute profiling category

Introduction to key attribute profiling

Key attribute profiling provides Sage CRM users with a method for setting up dynamic sets of data associated with People, Companies, Opportunities, Cases, and Leads.

For example, you need to store address details for a new company because all companies have an associated address. If you need to store more address information than the standard fields provide for, you can add new fields to the address or company tables.

However, you may also want to record company-specific information, such as which companies attended your roadshows, who attended, and when they attended. Some companies may not have any data in this section as they never went to the roadshows, some companies will have attended many roadshows, and some companies will have only attended one roadshow. This is ideal for key attribute profiling data.

To capture this using key attribute profiling data:

1. Design a key attribute profiling structure, which is a tree structure of categories.
2. Create a key attribute profiling category.
3. Define key attribute profiling category groups.
4. Set up key attribute profiling lists.
5. Add fields to the categories, which will record the data you want to collect.
6. Create a category group tab to display the key attribute profiling data to the user.

Designing a key attribute profiling structure

Before you build a structure of categories, create an outline design of the data, field types and key attribute lists you need. This helps you identify common key attribute lists, so you have to build them only once.
Example category types are:

- Parent Category : No Data Held
- Single Instance Data Category
- Multiple Instance Data Category

For example, when recording training information about people at customer sites, you want to record the results of multiple evaluation forms, so the Evaluation Form Feedback category is flagged as a Multiple Instance Data Category. The other categories are Single Instance Data Categories, because data is stored directly within the categories.

You should also identify fields that are common to multiple categories.

For example, if you are collecting information about home appliances purchased, you may initially think of the following categories and fields:

All Categories
  
  Washing Machine
  Vacuum Cleaner
  Fridge

You can quickly identify that each category has three fields in common; Manufacturer, Price, and Warranty Expiration. Instead of creating these fields under each category, you can create a higher level parent category first called "Home Appliances", which has these three fields associated with it. Then, when you create "Washing Machine", "Vacuum Cleaner" and "Fridge" as child categories of Home Appliances, they automatically inherit the three common fields, and all you have to add under each child category is the Model key attribute list for each appliance type:

All Categories
  
  Home Appliances
    
    Washing Machine
    Vacuum Cleaner
    Fridge

Adding fields to the parent level category after the child categories are created does not automatically add the new fields to the categories below. If you add a field to the parent level and then add a new child category, the child category inherits the existing and new fields.

Key Attribute Categories do not store default values. If there is no selection, nothing is stored, so you can't report on empty check boxes. For this reason, you should use a “Yes” or “No” selection instead of a check box.
Creating a key attribute profiling category

1. Click <My Profile> | Administration | Advanced Customization | Key Attributes | Categories.
2. Choose the category that your new categories are subordinate to from Key Attribute Categories. If this is the first category you’re creating, choose All Categories.
3. Enter a name in Category Name.
4. Choose the category type. For example, to allow the user enter information more than once within this category, choose Multiple Instance Data Category.
5. Click Add. The new category is displayed in Key Attribute Categories.
6. Choose the category you want the new category to be subordinate to, and add the rest of the categories.

Category fields and field types

The following tables explain category fields and field types

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Name</td>
<td>Name of the field.</td>
</tr>
<tr>
<td>Field Type</td>
<td>Check boxes, Text, Selection, Date/Time, and more. See table below for more detail. The Field Type defines how the information is added into the system.</td>
</tr>
<tr>
<td>New Line</td>
<td>Positions the field on a new line.</td>
</tr>
<tr>
<td>Required</td>
<td>Defines if the field is mandatory. If no data is added to any of the fields in the same category as the required field—including the required field—then nothing is stored and no validation error is raised. However, if any field in the category contains data, the required field is mandatory.</td>
</tr>
<tr>
<td>Max Length</td>
<td>Defines the maximum length of, for example, a text field.</td>
</tr>
<tr>
<td>Entry Width</td>
<td>Defines the length of the field displayed on the screen.</td>
</tr>
<tr>
<td>Key Attribute List</td>
<td>If the Field Type has been set to Selection, the key attribute list must be specified here.</td>
</tr>
<tr>
<td>Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Blank</td>
<td>Non-data field. Appears on the screen as ‘-‘. It is used to align columns and insert offsets.</td>
</tr>
<tr>
<td>Label</td>
<td>Non-data field. Displays the text from the Field Name on the screen as a label. The user is not prompted to input any data.</td>
</tr>
<tr>
<td>Text</td>
<td>Free text in a single line.</td>
</tr>
<tr>
<td>Multiline Text</td>
<td>Multiple lines of free text.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Hyperlinked email address.</td>
</tr>
<tr>
<td>WWW URL</td>
<td>Hyperlinked Web site address.</td>
</tr>
<tr>
<td>Selection</td>
<td>List predefined within the Key Attribute Lists tab.</td>
</tr>
<tr>
<td>Integer</td>
<td>Integer value.</td>
</tr>
<tr>
<td>Numeric</td>
<td>Numerical value.</td>
</tr>
<tr>
<td>Date &amp; Time</td>
<td>Calendar and time.</td>
</tr>
<tr>
<td>Checkbox</td>
<td>Check box.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone Number fields are displayed as hyperlinked values on the screen. This allows CTI-enabled users to make outbound calls by clicking the value of the field.</td>
</tr>
<tr>
<td>Currency</td>
<td>Allows a user to enter an amount and select a currency from a list.</td>
</tr>
</tbody>
</table>

**Defining key attribute profiling category groups**

Category Groups specify the data that appears on a Key Attribute Profiling screen. You need to define one structure of categories only, but it’s useful to define multiple category groups so you can reuse different sets of categories relevant to the data you want to collect.

You can specify a group as static or dynamic. A static group is stored automatically under the Group Entries heading, which forms part of the Key Attribute Categories list. A dynamic group appears in this list only after an action, such as a mail merge, mass email, or task, has been run against it.

1. Click `<My Profile> | Administration | Advanced Customization | Key Attributes | Category Groups`. A list of existing Category Groups is displayed.
   - General Category Groups. This is the default.
   - Call Handling Category Groups
   - Activity Category Groups
2. Ensure **General Category Groups** is selected.
3. Click **New**.
4. Add the **Name** and **Description**.
5. Use the arrows to move categories from **Key Attribute Categories** to **Categories Within Group**. When you move a parent category, its child categories are also moved.
6. Use the arrows on **Categories Within Groups** to change the order in which categories appear on the Key Attribute Profiling screen.
7. Click **Save**.

**Default activities**

When you create a group, you can run actions or activities against it, for example, mail merge, mass email, or task. You can also create these under Wave Activities.

When you set up actions against a group, you are presented with a default communication screen. At the end of the communication screen a list of categories is displayed, filled from the Activity Category Groups. Each of these hard coded Activity Category Groups is initially filled with a Default Activity Category. They appear under the System Categories category off the All Categories directory.

The Administrator can go in via **<My Profile> | Administration | Key Attributes | Category Groups** and change the contents of the Activity Category Group, but this deletes the Category Group. It is set up in this way because the administrator has no other way to define what appears on that communication screen from the user side, so they cannot specify a different Activity Category Group. All they can do is edit the existing one.

When the activity is saved, a new Category is created under the parent selected from the Category displayed, and all of the people in the group that the action is run against are linked to a piece of Key Attribute Data (the date of the action). Not only can you tell who is on a group, but you can tell who had what actions run against them. You can also fill in a number of other fields on the category and use these to store feedback information.

**Setting up key attribute profiling lists**

You should set up key attribute lists before adding the fields to the categories you have set up.

1. Click **<My Profile> | Administration | Advanced Customization | Key Attributes | Key Attribute Lists**.
2. Enter the list name in **New List Name**. The name can be a generic description of the list rather than map exactly to the field name, since you can reuse the key attribute list if it applies to a number of fields. For example, questionnaire answers such as Poor, Average, Good, Very Good, Excellent, are reused a number of times, linked to separate fields. A generic description for this reusable list could be **Rating**.
3. Click **Add List**. The Maintain Lookup Selections page is displayed. For more information, see **Fields**.
4. Add Codes and Translations for the selections.
5. Click **Save**. The Key Attribute Lists page is displayed. **Not Currently In Use** indicates the list has not yet been linked to a category in **Key Attribute**.
**Categories.** When a list is linked to a category, this area is headed: Key Attribute Used In, and a list of all branches in the tree where the list is used is displayed.

6. Follow the same procedure to add more lists.

7. To edit existing selections, click **Change**.

### Adding fields to key attribute profiling categories

1. Click <My Profile> | Administration | Advanced Customization | Key Attributes | Categories.
2. Choose the category that you want to add fields to.
3. Click **Edit Fields**.
4. Complete the **Category fields and field types** and click **Add**. The fields vary depending on the Field Type that you specify. For example, the **Key Attribute List** field is displayed only when **Field Type** is set to **Selection**.
5. When you've added all the fields for this category, click **Save**.

### Displaying key attribute profiling data

To display key profiling data to the user, add a new tab to an existing tab group.

1. Click <My Profile> | Administration | Customization | Primary Entities | <Entity>.
2. Click **Tabs**.
3. Choose the tab group that you want to customize.
4. Enter the name of the new tab in the Properties panel.
5. Choose **Key Attributes** from **Action**.
6. Choose **Category Group** from **Key Attribute Category Group**.
7. Add an SQL statement to display the tab only when certain criteria are met. For example, the following statement displays the tab if the person works for a company where the Company Type field is set to Customer.

   \[
   \text{pers\_companyid} = (\text{select comp\_companyid from company where comp\_companyid} = \text{pers\_companyid and comp\_type} = 'customer')
   \]

8. Click **Add** and then click **Save**.
Deleting a key attribute profiling category

1. Click <My Profile> | Administration | Advanced Customization | Key Attributes | Categories.
2. Highlight the category you want to delete on the Key Attribute Categories list. You cannot delete or deactivate the All Categories top category.
   - If there is no data in this category, click Delete on the Category Details panel. The category is removed from the Key Attribute Categories list.
   - If there is data in this category, click Deactivate. The category is hidden from the Key Attribute Categories list until reactivated.

Recovering a key attribute profiling category

1. Click <My Profile> | Administration | Advanced Customization | Key Attributes | Categories.
2. Select Show Deactivated. Deactivated categories are displayed with an asterisk (*) beside the category name.
3. Choose the category you want to reactivate.
4. Click Reactivate.
5. Click Continue.
Workflow

- About workflow
- Configuring workflow and escalation rule behavior
- Building a workflow

About workflow

Workflow automates business processes using a predefined set of business rules and actions. A workflow guides the user through a business process, checking, tracking, and validating information, and triggering
actions. It's a great way to reduce administration overhead, ensure consistency, and benchmark performance.

For example, you could apply a workflow rule to opportunities to automatically generate a follow-up call whenever a quote is issued to a customer. Or you could apply a workflow rule to cases to send an email to the customer service supervisor if a case remains at the Investigating stage for more than twenty-four hours.

**Tip:** Workflows should support business processes, not replicate them. Workflows that are too prescriptive actually prevent people from getting the most out of Sage CRM rather than helping them to complete their tasks.

You can apply workflow to company, person, communication, lead, opportunity, case, solution, campaign, wave, and wave item records. You can also apply workflow to custom entities. To apply workflow to an external table, you must create a shadow table in Sage CRM. The data is retrieved from the external table in the ASP pages associated with the workflow rules. For more information, see the Developer Help on the Sage CRM Help Center.

**Note:** When you import leads into Sage CRM, they are not automatically added to a workflow. When a lead is converted to an opportunity, it is not automatically added to an opportunity workflow; it must be progressed using the default Accept and Reject action buttons.

A workflow consists of states, rules, and actions.

- A **state** is the current resting place for a record in the workflow process. The user sees a predefined set of business actions based on the record’s current state in the workflow. For more information, see Workflow states.
- A **rule** determines the actions that are performed on the record in a specific state and often move the record to another state. For more information, see Workflow rules.
- An **action** is the execution of the rule when the user selects the workflow rule, or when conditions are met to validate the rule. For more information, see Workflow actions.

Sage CRM has a graphical workflow tree that uses loops and branches and lets you view a visual representation of the states and rules in your workflow as you build it.

### Setting up workflow

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct an analysis of your business processes and produce a flow diagram that outlines your workflow and lists the actions you need.</td>
<td>For sample questions to help you identify your business processes, see the Implementation Workbook on the Sage CRM Help Center.</td>
</tr>
<tr>
<td>Enable your system for workflow and activate workflow for the required entities.</td>
<td>See Configuring workflow and escalation rule behavior.</td>
</tr>
<tr>
<td>Task</td>
<td>Help</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Complete all field, list, and screen customizations.</td>
<td>Fields</td>
</tr>
<tr>
<td></td>
<td>Lists</td>
</tr>
<tr>
<td></td>
<td>Screens</td>
</tr>
</tbody>
</table>

Customize the **Stage** and **Status** list selections for opportunities, cases, leads, and solutions if necessary. These fields often help define the state of a record at different points in the workflow. Adding more selections to these fields does not affect existing workflows unless you explicitly build in behavior to use the new selections. Do not delete list selections because the workflow relies on the **In Progress** status. Rename the translations for list selections instead.

Check the GIF files. If you change the **Stage** and **Status** lists, you may lose the GIF file representation of the values. To fix this, edit or update the GIF file in the `Img` subdirectory of Sage CRM. The GIF file name must exactly match the untranslated code of the list selection.

### Building a workflow

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new workflow using the graphical workflow tree.</td>
<td>Creating a workflow</td>
</tr>
<tr>
<td>Create workflow states.</td>
<td>Creating a workflow state</td>
</tr>
<tr>
<td>Create workflow rules and add actions to the rules.</td>
<td>Creating a workflow rule</td>
</tr>
<tr>
<td>Add states and rules to the workflow and activate the workflow so you can test it and then make it available to users.</td>
<td>Adding states and rules to a workflow</td>
</tr>
</tbody>
</table>

### Workflow states

A state is the current resting place for a record in the workflow process. The user sees a predefined set of business actions based on the record’s current state in the workflow. The current workflow state is stored in a column on the entity record.

**Entry states** define entry points into the workflow. The Start state in the workflow tree is an entry state by default. Usually, a primary rule hangs off this state to create a new entity, which automatically becomes part of the workflow. Alternatively, you can hang transition rules from the entry state so users can add existing records to the workflow. For more information, see [Workflow rules](#).
**Duplicate states** represent branching and looping in a traditional flow-chart and allow you to define alternate paths in the workflow. For example, a lead in the Quick Sale Workflow can be progressed directly to Sold, or put On Hold and then progressed to Sold.

## Workflow rules

A workflow rule determines the actions that are performed on the record in a specific state and often move the record to another state. There are several types of workflow rule. For information about the actions that can work with each type of workflow rule, see [Workflow actions](#).

- **Use primary rules** at the beginning of a workflow to create a new case, opportunity, solution, or lead record that's automatically part of the workflow. The primary rule replaces the standard **New** button which is displayed when workflow is deactivated. For consistency in the UI, you can set the rule **Label** to `New <entity>` and set **Alternative Image for Rule** to `New.gif`. You generally use column change actions with primary rules. Primary rules are represented by light purple arrows in the workflow tree.

  **Note:** If your workflow creates a new record that has a dedupe search or an inbuilt system action, you must hang a transition rule rather than a primary rule from the entry state. For example, NewCompany, NewIndividual.

- **Use transition rules** to connect one workflow state to the next. Transition rules are displayed to the user as workflow action buttons. A transition rule linked to a workflow entry state lets a user add a record to a workflow. For example, transition rules allow a user to add an existing lead record to a lead workflow. Similarly, transition rules allow a user to add an opportunity that's been progressed from a lead to an opportunity workflow. Transition rules are represented by purple arrows in the workflow tree.

- **Use conditional rules** to create two sets of actions. One set is executed when the JavaScript condition is true, the other set is executed when the condition is false. The JavaScript condition on a Conditional Rule is evaluated when the user clicks the workflow rule button. This means that conditional rules always show as long as other conditions (for example, Restrict to Team) are true. The advantage of a conditional rule is that it's always displayed to the user as a reminder. Also, when the user selects the rule and the conditions are not met, a message can be displayed stating the reason. Conditional rules are represented by two purple arrows in the workflow tree; one arrow has a green tick (True), the other arrow has a red cross (False).

- **Use escalation rules** to add actions that occur when certain conditions are met. You specify conditions as SQL WHERE clauses in the rule. You can also use escalation rules outside the context of workflow. For more information, see [About quick notifications and escalation rules](#). Escalation rules are represented by blue arrows in the workflow tree.

  **Note:** You can specify a time limit on each stage of a case workflow to act as an SLA with a warning limit. To do this, create a field on Cases that stores the start date of each stage (for example, `case_startstage`) and ensure the date is entered when the case moves to a new stage. You can base escalation rules on the value in the date field. To record the duration of each stage, set up specific fields for each stage (for example, `case_startstage1`, `case_stage1duration`, `case_startstage2`, `case_stage2duration`) and use [Execute SQL Statement](#) workflow actions to update these values.
- Use **global rules** to add actions that are always available and do not move the workflow into another state. Global rules always hang from the Start state. For example, use a global rule to allow the user to edit an opportunity at any point in the opportunity’s life cycle. If the user makes changes to certain opportunity details, the opportunity is not progressed to a different state. Global rules are represented by blue arrows with a purple circle in the workflow tree.

**Note:** To change the name of an existing workflow rule, you must change the translation for all languages in `<My Profile> | Administration | Customization | Translations`.

## Workflow actions

There are two types of workflow actions.

- **User driven actions** use JavaScript to check the data condition. These actions require the user to interact with the workflow screen and require a request from the browser. You can use these actions with transitional, conditional, and global workflow rules because these rules are driven by the user.

- **Time driven actions** use SQL to check the data and time condition. You can use these actions with escalation rules because these rules are time based and fire automatically in the server without a request from the browser.

The table below shows which workflow actions can be used with each type of workflow rule.

<table>
<thead>
<tr>
<th>Action</th>
<th>Primary</th>
<th>Transitional</th>
<th>Global</th>
<th>Conditional</th>
<th>Escalation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Column Change Actions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set Column Value</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Reset Column Value</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Display Field for Amendment</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Show Message on Screen</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td><strong>Follow-up Actions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Task</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Appointment</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Opportunity</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Case</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Lead</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Solution</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>
### Action Types

<table>
<thead>
<tr>
<th>Action</th>
<th>Primary</th>
<th>Transitional</th>
<th>Global</th>
<th>Conditional</th>
<th>Escalation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Word Merge Document</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create PDF Merge Document</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Execute SQL Statement</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Run Stored Procedure</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><strong>Informative Actions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show Notification on Screen</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Send Email</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Send SMS Message</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td><strong>Campaign Actions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Task for Group</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Document for Group</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Export Group to File</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Create Outbound Call List</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

Y = Action can be used with this type of rule.

N = Action cannot be used with this type of rule.

### Set Column Value

Use **Set Column Value** to insert a specified value into a column on the current table. For example, when an opportunity is created, set the opportunity **Certainty**% field to 25.

The table below describes **Set Column Value** fields on the **New Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The action to be performed.</td>
</tr>
<tr>
<td><strong>Column</strong></td>
<td>The column to be updated. For example, oppo_certainty.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Value</td>
<td>The value to be entered in the column. If the column to be updated is a date field, set Value to 0 to set the field to the current date/time. Use an integer to set the date/time to an offset (in minutes) from the current date/time. For example, 30 = 30 minutes from now, 10080 = 7 days from now, and 129600 = 90 days (3 months) from now. You can use ## symbols to add information from the related entity. For more information, see Using the ## and # symbols.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the field on the screen. Choose Hidden to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>New Line</td>
<td>The position of the field on the screen for this workflow rule. If you leave this blank, the field is displayed on the same line as the previous field.</td>
</tr>
<tr>
<td>Row Span</td>
<td>The number of rows over which the field is displayed. If you leave this blank, the field is displayed on one row.</td>
</tr>
<tr>
<td>Col Span</td>
<td>The number of columns over which the field is displayed. If you leave this blank, the field is displayed over one column.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Create Script</td>
<td>Add a field-level script using JavaScript that's executed when the progress screen is displayed to the user. The scripting applies to the workflow rule to which the action is linked. For more information about field-level scripting, see Advanced screen customization.</td>
</tr>
<tr>
<td>OnChange Script</td>
<td>Add a field-level script that's executed when a user changes the value on the progress screen. The scripting applies to the workflow rule to which the action is linked. You can use generic JavaScript and/or Sage CRM's client-side API library of functions. For more information, see Advanced screen customization.</td>
</tr>
<tr>
<td>Validate Script</td>
<td>Add a field-level script using JavaScript that's executed when a user saves changes made to the progress screen. The scripting applies to the workflow rule to which the action is linked.</td>
</tr>
</tbody>
</table>

**Reset Column Value**

Use Reset Column Value to insert a value from one field into another field. For example, you can assign an opportunity from its current owner to the person who created the opportunity.

The table below describes Reset Column Value fields on the Workflow Action Details screen.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Column</td>
<td>The column to be updated. For example, oppo_certainty.</td>
</tr>
<tr>
<td>Value</td>
<td>The value to be entered in the column. If the column to be updated is a date field, set <strong>Value</strong> to 0 to set the field to the current date/time. Use an integer to set the date/time to an offset (in minutes) from the current date/time. For example, 30 = 30 minutes from now, 10080 = 7 days from now, and 129600 = 90 days (3 months) from now. You can use ## symbols to add information from the related entity. For more information, see <a href="#">Using the ## and # symbols</a>.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the field on the screen. Choose Hidden to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>New Line</td>
<td>The position of the field on the screen for this workflow rule. If you leave this blank, the field is displayed on the same line as the previous field.</td>
</tr>
<tr>
<td>Row Span</td>
<td>The number of rows over which the field is displayed. If you leave this blank, the field is displayed on one row.</td>
</tr>
<tr>
<td>Col Span</td>
<td>The number of columns over which the field is displayed. If you leave this blank, the field is displayed over one column.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Create Script</td>
<td>Add a field-level script using JavaScript that's executed when the progress screen is displayed to the user. The scripting applies to the workflow rule to which the action is linked. For more information about field-level scripting, see <a href="#">Advanced screen customization</a>.</td>
</tr>
<tr>
<td>OnChange Script</td>
<td>Add a field-level script that's executed when a user changes the value on the progress screen. The scripting applies to the workflow rule to which the action is linked. You can use generic JavaScript and/or Sage CRM's client-side API library of functions. For more information, see <a href="#">Advanced screen customization</a>.</td>
</tr>
<tr>
<td>Validate Script</td>
<td>Add a field-level script using JavaScript that's executed when a user saves changes made to the progress screen. The scripting applies to the workflow rule to which the action is linked.</td>
</tr>
</tbody>
</table>
## Display Field for Amendment

Use **Display Field for Amendment** to display the current value of a field on the workflow progress screen. The field value can be blank.

The table below describes **Display Field for Amendment** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Column</td>
<td>The field to be displayed.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the field on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>New Line</td>
<td>The position of the field on the screen for this workflow rule. If you leave this blank, the field is displayed on the same line as the previous field.</td>
</tr>
<tr>
<td>Row Span</td>
<td>The number of rows over which the field is displayed. If you leave this blank, the field is displayed on one row.</td>
</tr>
<tr>
<td>Col Span</td>
<td>The number of columns over which the field is displayed. If you leave this blank, the field is displayed over one column.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Create Script</td>
<td>Add a field-level script using JavaScript that's executed when the progress screen is displayed to the user. The scripting applies to the workflow rule to which the action is linked. For more information about field-level scripting, see <a href="#">Advanced screen customization</a>.</td>
</tr>
<tr>
<td>OnChange Script</td>
<td>Add a field-level script that's executed when a user changes the value on the progress screen. The scripting applies to the workflow rule to which the action is linked. You can use generic JavaScript and/or Sage CRM's client-side API library of functions. For more information, see <a href="#">Advanced screen customization</a>.</td>
</tr>
<tr>
<td>Validate Script</td>
<td>Add a field-level script using JavaScript that's executed when a user saves changes made to the progress screen. The scripting applies to the workflow rule to which the action is linked.</td>
</tr>
</tbody>
</table>

### Show Message on Screen

Use **Show Message on Screen** to display an onscreen message to the user. This message can provide instructions or help to the user during the workflow.
The table below describes **Show Message on Screen** fields on the **New Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Message</td>
<td>The message text. This can be text or a translatable code on the translations table. <strong>Capt_Family</strong> must be <strong>ActionText</strong> and <strong>Capt_FamilyType</strong> must be <strong>Tags</strong>.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the field on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>New Line</td>
<td>The position of the field on the screen for this workflow rule. If you leave this blank, the field is displayed on the same line as the previous field.</td>
</tr>
<tr>
<td>Row Span</td>
<td>The number of rows over which the field is displayed. If you leave this blank, the field is displayed on one row.</td>
</tr>
<tr>
<td>Col Span</td>
<td>The number of columns over which the field is displayed. If you leave this blank, the field is displayed over one column.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the field is placed on the workflow progress screen</td>
</tr>
</tbody>
</table>

### Create Task

Use **Create Task** to prompt the user to schedule a task as part of a workflow process, or to automatically create a task with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes **Create Task** fields on the **New Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Get Default User From</td>
<td>The user assigned to the task. You can use the # symbol to add information about the current user. For more information, see Using the ## and # symbols. If you've specified a user in <strong>User</strong>, leave this blank.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Label for new task</td>
<td>The label that's attached to the task. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the communication. For example, Display the Closed workflow rule when Status of related communication labeled &quot;XYZ&quot; is Complete.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Action</td>
<td>The type of action. For example, Phone Out.</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject of the action. For example, Customer Service Call. You can use ## symbols to add information about the related entity. For example, Customer Service Call for opportunity #oppo_opportunityid# closed on #oppo_closed#, displays the opportunity ID and the Date/Time the opportunity was closed. For more information, see Using the ## and # symbols. You should use a unique subject to make it easy for users to differentiate a large number of similar records in a list in Sage CRM or in Outlook, if you're using Classic Outlook or Exchange Integration.</td>
</tr>
<tr>
<td>Details</td>
<td>The task details.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the task.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the task.</td>
</tr>
<tr>
<td>Private</td>
<td>Specifies that the task is private. A private task is not displayed in the Team calendar.</td>
</tr>
<tr>
<td>Created By</td>
<td>The user who created the task. This is the current user.</td>
</tr>
<tr>
<td>Created Date</td>
<td>The date on which the task is created. This is the current date.</td>
</tr>
<tr>
<td>Percentage Complete</td>
<td>The percentage of the task that's completed. The user enters this value.</td>
</tr>
<tr>
<td>Completed Time</td>
<td>The percentage of time allocated to the task that's completed. The user enters the value.</td>
</tr>
<tr>
<td>User</td>
<td>The user assigned to the task. If this is blank, the user in Get Default User From is used.</td>
</tr>
<tr>
<td>Onscreen Reminder</td>
<td>Displays an onscreen reminder notification to the user assigned to the task.</td>
</tr>
<tr>
<td>Reminder</td>
<td>The time before the task at which a reminder is sent.</td>
</tr>
</tbody>
</table>
Field | Description
--- | ---
**Send Reminder Message** | Sends a reminder to the user assigned to the task. Reminder formats and priorities are set up in the user’s Reminder Preferences.

**Team** | The team assigned to the task.

**Current Time Offset** | The number of minutes between the time at which the action is executed and the time at which the action is recorded. This is useful if users are working in a different time zone to the current time zone.

---

**Create Appointment**

Use **Create Appointment** to prompt the user to schedule an appointment as part of a workflow process, or to automatically create an appointment with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes the Create Appointment fields on the New Workflow Action Details screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The action to be performed.</td>
</tr>
</tbody>
</table>

**Get Default User From** | The user assigned to the appointment. You can use the # symbol to add information about the current user. For more information, see Using the ## and # symbols. If you've specified a user in User, leave this blank.

**Attribute** | The attribute of the button on the screen. Choose Hidden to automatically execute the action with predefined values without displaying it to the user.

**Label for new appointment** | The label that’s attached to the appointment. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the communication. For example, *Display the Closed workflow rule when Status of related communication labeled “XYZ” is Complete.*

**Order** | The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.

**Action** | The type of action. For example, Meeting.
### Field | Description
--- | ---
Subject | The subject of the action. For example, Customer demo. You can use ## symbols to add additional information about the related entity. For example, Customer demo for opportunity #oppo_opportunityid# closed on #oppo_closed#, displays the opportunity ID and the Date/Time the opportunity was closed. For more information, see Using the ## and # symbols. You should use a unique subject to make it easy for users to differentiate a large number of similar records in a list in Sage CRM or in Outlook, if you’re using Classic Outlook or Exchange Integration.
Details | The appointment details.
Status | The status of the appointment.
Priority | The priority of the appointment.
Private | Specifies that the appointment is private. A private appointment is not displayed in the Team calendar.
Created By | The user who created the appointment. This is the current user.
Created Date | The date on which the appointment is created. This is the current date.
Percentage Complete | The percentage of the appointment that's completed. The user enters this value.
Completed Time | The percentage of time allocated to the appointment that's completed. The user enters this value.
User | The user assigned to the appointment. If this is blank, the user in Get Default User From is used.
Reminder | The time before the appointment at which a reminder is sent.
Send Reminder Message | Sends a reminder to the user assigned to the appointment. Reminder formats and priorities are set up in the user's Reminder Preferences.
Team | The team assigned to the appointment.
Current Time Offset | The number of minutes between the time at which the action is executed and the time at which the action is recorded. This is useful if users are working in a different time zone to the current time.

### Create Opportunity

Use Create Opportunity to prompt the user to create a new opportunity as part of a workflow process, or to automatically create an opportunity with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.
The table below describes the **Create Opportunity** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Get Default User From</td>
<td>The user assigned to the opportunity. You can use the # symbol to add information about the current user. For more information, see <a href="#">Using the ## and # symbols</a>. If you've specified a user in <strong>Assigned To</strong>, leave this blank.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Label for new opportunity</td>
<td>The label that's attached to the opportunity. You can use it in JavaScript conditions on future workflow rules to test the values of fields on that opportunity.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the opportunity.</td>
</tr>
<tr>
<td>Source</td>
<td>The source of the opportunity. For example, Web, Referral.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of opportunity or general area of product interest. For example, Services, Consulting.</td>
</tr>
<tr>
<td>Customer Ref</td>
<td>Customer reference code.</td>
</tr>
<tr>
<td>Details</td>
<td>Details of the opportunity. You can use ## symbols to add information about the related entity. For example, <strong>Upsold from #case_description##.</strong> For more information, see <a href="#">Using the ## and # symbols</a>.</td>
</tr>
<tr>
<td>Closed</td>
<td>The actual date on which the opportunity closed.</td>
</tr>
<tr>
<td>Competitors</td>
<td>A list of competitors for the opportunity.</td>
</tr>
<tr>
<td>Current Time Offset</td>
<td>The number of minutes that are added to the time at which the action is executed. This is used to calculate the date and time displayed in the opportunity <strong>Opened</strong> fields.</td>
</tr>
<tr>
<td>Stage</td>
<td>The stage of the opportunity.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the opportunity.</td>
</tr>
<tr>
<td>Forecast</td>
<td>The forecasted value of the opportunity.</td>
</tr>
</tbody>
</table>
Create Case

Use Create Case to prompt the user to create a new case as part of a workflow process, or to automatically create a case with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes the Create Case fields on the Workflow Action Details screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Get Default User From</td>
<td>The user assigned to the case. You can use the # symbol to add information about the current user. For more information, see Using the ## and # symbols. If you've specified a user in Assigned To, leave this blank.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose Hidden to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Label for new case</td>
<td>The label that's attached to the case. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the communication. For example, Display the Closed workflow rule when Status of related communication labeled “XYZ” is Complete.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>RefId</td>
<td>The issue log ID.</td>
</tr>
<tr>
<td>Found In</td>
<td>The product version in which the problem was found.</td>
</tr>
<tr>
<td>SLA</td>
<td>The SLA that's applied to the case.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SLA Severity</td>
<td>The severity of the SLA applied to the case.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the problem.</td>
</tr>
<tr>
<td>Area</td>
<td>The area of the product that's affected by the problem.</td>
</tr>
<tr>
<td>Source</td>
<td>How the problem was raised.</td>
</tr>
<tr>
<td>Customer Ref</td>
<td>The customer's own reference identifier.</td>
</tr>
<tr>
<td>Fix In</td>
<td>The product version in which the problem will be fixed.</td>
</tr>
<tr>
<td>Created By</td>
<td>The person who logged the case.</td>
</tr>
<tr>
<td>Current Time Offset</td>
<td>The number of minutes that are added to the time at which the action is executed. This is used to calculate the date and time displayed in the case <strong>Opened</strong> fields.</td>
</tr>
<tr>
<td>Severity</td>
<td>The priority of the case.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>The user assigned to the case. If this is blank, the user in <strong>Get Default User From</strong> is used.</td>
</tr>
<tr>
<td>Team</td>
<td>The team assigned to the case.</td>
</tr>
<tr>
<td>Stage</td>
<td>The stage of the case.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the case.</td>
</tr>
<tr>
<td>Problem Type</td>
<td>The type of problem.</td>
</tr>
<tr>
<td>Solution Type</td>
<td>The type of solution.</td>
</tr>
<tr>
<td>Problem Details</td>
<td>A detailed description of problem.</td>
</tr>
<tr>
<td>Solution Details</td>
<td>A detailed description of solution.</td>
</tr>
<tr>
<td>Closed</td>
<td>The date the case is closed.</td>
</tr>
</tbody>
</table>

**Create Lead**

Use **Create Lead** to prompt the user to create a new lead as part of a workflow process, or to automatically create a lead with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes the **Create Lead** fields on the **Workflow Action Details** screen.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Get Default User From</td>
<td>The user assigned to the lead. You can use the # symbol to add information about the current user. For more information, see Using the ## and # symbols. If you've specified a user in Assigned To, leave this blank.</td>
</tr>
<tr>
<td><strong>Attribute</strong></td>
<td>The attribute of the button on the screen. Choose Hidden to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td><strong>Label for new lead</strong></td>
<td>The label that's attached to the lead. You can use it in JavaScript conditions on future workflow rules to test the values of fields on that opportunity.</td>
</tr>
<tr>
<td><strong>Order</strong></td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td><strong>Stage</strong></td>
<td>The stage of the lead.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The status of the lead.</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>The priority of the lead.</td>
</tr>
<tr>
<td><strong>Assigned to</strong></td>
<td>The user assigned to the lead. If this is blank, the user in Get Default User From is used.</td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td>The team assigned to the lead.</td>
</tr>
<tr>
<td><strong>Rating</strong></td>
<td>The lead rating.</td>
</tr>
<tr>
<td><strong>Company Name</strong></td>
<td>The name of the company.</td>
</tr>
<tr>
<td><strong>Web Site</strong></td>
<td>The company URL.</td>
</tr>
<tr>
<td><strong>Industry</strong></td>
<td>A lead's industry.</td>
</tr>
<tr>
<td><strong>Annual Revenue</strong></td>
<td>The approximate revenue of the company.</td>
</tr>
<tr>
<td><strong>No. of Employees</strong></td>
<td>The approximate number of employees in the company.</td>
</tr>
<tr>
<td><strong>Last name</strong></td>
<td>The lead contact's surname.</td>
</tr>
<tr>
<td><strong>First name</strong></td>
<td>The lead contact's first name.</td>
</tr>
<tr>
<td><strong>Salutation</strong></td>
<td>The lead contact's salutation.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>The lead contact's job title.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Email</td>
<td>The lead contact's email address.</td>
</tr>
<tr>
<td>Country Code</td>
<td>The lead contact's phone country code.</td>
</tr>
<tr>
<td>Area Code</td>
<td>The lead contact's phone area code.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The lead contact's phone number.</td>
</tr>
<tr>
<td>Fax Country Code</td>
<td>The lead contact's fax country code.</td>
</tr>
<tr>
<td>Fax Area Code</td>
<td>The lead contact's fax area code.</td>
</tr>
<tr>
<td>Fax Number</td>
<td>The lead contact's fax number.</td>
</tr>
<tr>
<td>Address 1</td>
<td>First line of address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Second line of address.</td>
</tr>
<tr>
<td>Address 3</td>
<td>Third line of address.</td>
</tr>
<tr>
<td>Address 4</td>
<td>Fourth line of address.</td>
</tr>
<tr>
<td>City</td>
<td>Address city.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Address zip or postal code.</td>
</tr>
<tr>
<td>State</td>
<td>Address state or county.</td>
</tr>
<tr>
<td>Country</td>
<td>Address country.</td>
</tr>
</tbody>
</table>

**Create Solution**

Use **Create Solution** to prompt the user to create a new solution as part of a workflow process, or to automatically create a solution with predefined values and no user input. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes the **Create Solution** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The type of action to be performed.</td>
</tr>
<tr>
<td>Get Default User From</td>
<td>The user assigned to the solution.</td>
</tr>
<tr>
<td></td>
<td>You can use the # symbol to add information about the current user. For more information, see Using the ## and # symbols.</td>
</tr>
<tr>
<td></td>
<td>If you've specified a user in <strong>Assigned To</strong>, leave this blank.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Label for new solution</td>
<td>The label that's attached to the solution. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the solution.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Reference Id</td>
<td>The issue log ID.</td>
</tr>
<tr>
<td>Area</td>
<td>The area of the product that's affected by the solution.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the solution.</td>
</tr>
<tr>
<td>Details</td>
<td>Details of the solution. You can use ## symbols to add information from the related entity. For example, <strong>Related to #case_referenceid#</strong>. For more information, see <strong>Using the ## and # symbols</strong>.</td>
</tr>
<tr>
<td>Team</td>
<td>The team assigned to the solution.</td>
</tr>
<tr>
<td>Stage</td>
<td>The stage of the solution.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the solution.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>The user assigned to the solution. If this is blank, the user in <strong>Get Default User From</strong> is used.</td>
</tr>
</tbody>
</table>

**Create Word Merge Document**

Use **Create Word Merge Document** to perform a merge that creates a Word document when the progress screen fields are completed. The merge is performed in the same way as a document merge outside the workflow process. A copy of the merged Word document is saved in the library. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes **Create Word Merge Document** fields on the Workflow Action Details screen.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Value</td>
<td>The name of the document to be merged. If you leave this blank, the user can select a template when performing the merge.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
</tbody>
</table>

### Create PDF Merge Document

Use **Create PDF Merge Document** to perform a merge that creates a PDF document when the progress screen fields are completed. The merge is performed in the same way as a document merge outside the workflow process. A copy of the merged PDF document is saved in the library. You can use this action only with records that have been created and attached to a workflow. This means you cannot use it with primary rules.

The table below describes **Create PDF Merge Document** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Value</td>
<td>The name of the document to be merged. If you leave this blank, the user can select a template when performing the merge.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed.</td>
</tr>
</tbody>
</table>

### Execute SQL Statement

Use **Execute SQL Statement** to execute customized business logic. For example, use Execute SQL Statement in campaigns to delete all communications for a wave item.

**Warning:** Do not use this workflow action unless you are an SQL expert and have tested your workflow extensively in a non-live environment. Poorly constructed or erroneous SQL could have a seriously detrimental impact on your system.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
</tbody>
</table>
| SQL Statement         | The SQL clause to be executed. You can use ## symbols to add information from the related entity. For more information, see Using the ## and # symbols.
You can use multiple statements separated by semi-colons. However, you cannot declare a variable in one statement and use it in another statement. |
| Order                 | The order in which the action is executed. If this is the only action on the rule, leave Order blank. If there are many actions on the rule, give each action a priority. For example, when Order is set to 1, this action is the first to be executed. |
| Show Confirmation Message | Displays a message that allows the user cancel the action before execution. You should set this to Yes.
You can set up the message as a translation where Capt Family is ExecSql, Capt FamilyType is Tags, and Capt Code is the same name as the workflow action. |

**Run Stored Procedure**

Use Run Stored Procedure to insert a default value in a field as part of a workflow process. The stored procedure performs complex calculations and can update other records in the database.

**Warning:** Do not use this workflow action unless you are an SQL expert and have tested your workflow extensively in a non-live environment. Poorly constructed or erroneous SQL could have a seriously detrimental impact on your system.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Column</td>
<td>The value that the stored procedure returns is inserted in this column.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Value</td>
<td>The name of the stored procedure. The stored procedure must already be created on the database.</td>
</tr>
<tr>
<td></td>
<td>You must use the following parameters in the stored procedure. The stored procedure should always return (1).</td>
</tr>
<tr>
<td></td>
<td><strong>CREATE PROCEDURE [xxx]</strong></td>
</tr>
<tr>
<td></td>
<td>@table_name nvarchar (50), @identity_name varchar (50), @id_no int, @logon_no int, @return_value varchar(20) OUTPUT AS SELECT @return_value = '999' RETURN (1)</td>
</tr>
<tr>
<td></td>
<td>- @table_name: The table name of the workflowed entity.</td>
</tr>
<tr>
<td></td>
<td>- @identity_name: The table ID. For example, Case_CaseId.</td>
</tr>
<tr>
<td></td>
<td>- @id_no: The current record ID.</td>
</tr>
<tr>
<td></td>
<td>- @logon_no: The current user ID.</td>
</tr>
<tr>
<td></td>
<td>- @return_value: The value that's inserted in the field you specified in Column.</td>
</tr>
<tr>
<td></td>
<td>You can use the Cast method to change return_value to a different datatype (int or nchar). For example:</td>
</tr>
<tr>
<td></td>
<td><strong>CREATE PROCEDURE wf_addFreeNote</strong></td>
</tr>
<tr>
<td></td>
<td>@table_name nvarchar (50), @identity_name varchar (50), @id_no, @logon_no int, @return_value varchar(20) OUTPUT AS SELECT @return_value = Cast (@logon_no as varchar) RETURN (1)</td>
</tr>
</tbody>
</table>

**Show Notification on Screen**

Use **Show Notification on Screen** with escalation rules to display an onscreen notification to the user as part of the workflow process. For example, you can use this action to notify a user that they've been assigned a new web lead. You can use this action with escalation rules only.
The table below describes Show Notification on Screen fields on the New Workflow Action Details screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Column</td>
<td>The table field to be updated. This field is required.</td>
</tr>
<tr>
<td>Table</td>
<td>The table or view on which the action is executed.</td>
</tr>
<tr>
<td>Message</td>
<td>The content of the notification message. You can use ## symbols to add information about the related entity. For more information, see Using the ## and # symbols. This can be text or a translatable code. Capt_Family must be ActionText and Capt_FamilyType must be Tags.</td>
</tr>
</tbody>
</table>

Send Email

Use Send Email to send an email that's automatically filed against the corresponding entity and displayed on the Communications tab as part of the workflow process.

You can use this action on person, company, case, opportunity, solution, and custom entity (with communications) records. You must specify a notification email address in Workflow and escalation settings.

**Warning:** For any email feature to work, your IT department must set up an email server and configure Sage CRM to connect to it.

The table below describes Send Email fields on the Workflow Action Details screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>The email template.</td>
</tr>
<tr>
<td>From</td>
<td>The sender's email address. If you leave this field blank, the name and email address in Notify email name and Notify email address are used. For more information, see Workflow and escalation settings.</td>
</tr>
<tr>
<td>To</td>
<td>The recipient's email address. You can use the # symbol to add information about the current user. For example, #oppo_assigneduserid#. The user's email address must be correct. For more information, see Using the ## and # symbols.</td>
</tr>
<tr>
<td>CC</td>
<td>The CC recipient's email address.</td>
</tr>
<tr>
<td>BCC</td>
<td>The BCC recipient's email address.</td>
</tr>
</tbody>
</table>
**Send SMS Message**

Use Send SMS Message to send messages to a user’s phone as part of the workflow process. For example, to notify an opportunity owner of a change in opportunity status.

**Warning:** You need an SMS gateway to use this action and other SMS features of Sage CRM. Contact your IT department to set this up.

The table below describes Send SMS Message fields on the Workflow Action Details screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>SMS to Number</td>
<td>The recipient of the message. You can enter a mobile telephone number or use the ## symbols to send the message to a user such as the opportunity owner. For more information, see Using the ## and # symbols. The user's mobile phone number must be correctly set up in the User table.</td>
</tr>
<tr>
<td>SMS Subject</td>
<td>The subject of the message. You can use ## symbols to add information about the related entity. For more information, see Using the ## and # symbols.</td>
</tr>
<tr>
<td>SMS Body</td>
<td>The contents of the message. You can use ## symbols to add information about the related entity. For more information, see Using the ## and # symbols.</td>
</tr>
</tbody>
</table>
Create Task for Group

Use **Create Task for Group** to prompt the user to select a group and schedule a task as part of the workflow process. You typically use this action with rules associated with wave items in the Campaign Management module. For example, this action allows the user or campaign manager to set up an outbound telemarketing action for a list of prospects.

The table below describes **Create Task for Group** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Get Group From</td>
<td>A prefiltered list of groups. For example, Walt_Groups, displays only those groups linked to the current Campaign Wave Item.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Label for new task</td>
<td>The label that’s attached to the task. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the communication. For example, <em>Display the Closed workflow rule when Status of related communication labeled “XYZ” is Complete.</em></td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Exclude Previous Recipients</td>
<td>Displays the <strong>Exclude Previous Recipients</strong> checkbox on the workflow progress screen. If the user selects this checkbox, the new task is scheduled only for people who meet the group criteria and who’ve not yet had a task created for them.</td>
</tr>
<tr>
<td>Action</td>
<td>The type of action. For example, Phone Out.</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject of the action. For example, Customer Service Call. You can use ## symbols to add information about the related entity. For example, <em>Customer Service Call for opportunity #oppo_opportunityid# closed on #oppo_closed#, displays the opportunity ID and the Date/Time the opportunity was closed. For more information, see Using the ## and # symbols.</em> You should use a unique subject to make it easy for users to differentiate a large number of similar records in a list in Sage CRM or in Outlook, if you’re using Classic Outlook or Exchange Integration.</td>
</tr>
<tr>
<td>Details</td>
<td>The task details.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the task.</td>
</tr>
<tr>
<td>Priority</td>
<td>The priority of the task.</td>
</tr>
<tr>
<td>Private</td>
<td>Specifies that the task is private. A private task is not displayed in the</td>
</tr>
<tr>
<td></td>
<td>Team calendar.</td>
</tr>
<tr>
<td>Created By</td>
<td>The user who created the task. This is the current user.</td>
</tr>
<tr>
<td>Created Date</td>
<td>The date on which the task is created. This is the current date.</td>
</tr>
<tr>
<td>Percentage Complete</td>
<td>The percentage of the task that's completed. The user enters this value.</td>
</tr>
<tr>
<td>Completed Time</td>
<td>The percentage of time allocated to the task that's completed. The user</td>
</tr>
<tr>
<td></td>
<td>enters this value.</td>
</tr>
<tr>
<td>User</td>
<td>The user assigned to the task. If this is blank, the user in Get Default</td>
</tr>
<tr>
<td></td>
<td>User From is used.</td>
</tr>
<tr>
<td>Onscreen Reminder</td>
<td>Displays an onscreen reminder notification to the user assigned to the</td>
</tr>
<tr>
<td></td>
<td>task.</td>
</tr>
<tr>
<td>Reminder</td>
<td>The time before the task at which a reminder is sent.</td>
</tr>
<tr>
<td>Send Reminder Message</td>
<td>Sends a reminder to the user assigned to the task. Reminder formats and</td>
</tr>
<tr>
<td></td>
<td>priorities are set up in the user’s Reminder Preferences.</td>
</tr>
<tr>
<td>Team</td>
<td>The team assigned to the task.</td>
</tr>
<tr>
<td>Current Time Offset</td>
<td>The number of minutes between the time at which the action is executed and</td>
</tr>
<tr>
<td></td>
<td>the time at which the action is recorded. This is useful if users are</td>
</tr>
<tr>
<td></td>
<td>working in a different time zone to the current time zone.</td>
</tr>
</tbody>
</table>

**Create Document for Group**

Use **Create Document for Group** to prompt the user to select a group and carry out a mail merge as part of the workflow process. You typically use this action with rules associated with wave items in the Campaign Management module. For example, this action allows the user or campaign manager to set up and send a mail shot to a list of prospects.

The table below describes **Create Document for Group** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Value</td>
<td>The name of the document to be merged. If you leave this blank, the user</td>
</tr>
<tr>
<td></td>
<td>can select a template when performing the merge.</td>
</tr>
</tbody>
</table>
### Field Description

**Order**
The order in which the action is executed. If this is the only action on the rule, leave **Order** blank. If there are many actions on the rule, give each action a priority. For example, when **Order** is set to 1, this action is the first to be executed.

**Get Group From**
A prefiltered list of groups to choose from. For example, Walt_Groups displays only those groups linked to the current Campaign Wave Item.

**Exclude Previous Recipients**
Displays the **Exclude Previous Recipients** checkbox on the workflow progress screen. If the user selects this checkbox, the new document is created only for people who meet the group criteria and who've not yet received the mail.

### Export Group to File

Use **Export Group to File** to prompt the user to select a group and export it to a CSV file or delimited text file as part of the workflow process.

The table below describes **Export Group to File** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The action to be performed.</td>
</tr>
<tr>
<td><strong>Value</strong></td>
<td>A prefiltered list of groups. For example, Walt_Groups displays only those groups linked to the current Campaign Wave Item.</td>
</tr>
<tr>
<td><strong>Attribute</strong></td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td><strong>Label for new task</strong></td>
<td>The label that's attached to the task. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the wave item or related entity.</td>
</tr>
<tr>
<td><strong>Order</strong></td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td><strong>Exclude Previous Recipients</strong></td>
<td>Displays the <strong>Exclude Previous Recipients</strong> checkbox on the workflow progress screen. If the user selects this checkbox, the exported group contains only those records that meet the group criteria and who've not yet been exported.</td>
</tr>
</tbody>
</table>
Create Outbound Call List

Use **Create Outbound Call List** to prompt the user to create an outbound call list as part of a workflow process.

The table below describes **Create Outbound Call List** fields on the **Workflow Action Details** screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The action to be performed.</td>
</tr>
<tr>
<td>Group ID field name</td>
<td>A prefILTERED list of groups to choose from. For example, Walt_Groups displays only those groups linked to the current Campaign Wave Item.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute of the button on the screen. Choose <strong>Hidden</strong> to automatically execute the action with predefined values without displaying it to the user.</td>
</tr>
<tr>
<td>Label for new task</td>
<td>The label that's attached to the outbound call list. You can use it in JavaScript conditions on future workflow rules to test the values of fields on the wave item or related entity.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the action is executed. If this is the only action on the rule, leave <strong>Order</strong> blank. If there are many actions on the rule, give each action a priority. For example, when <strong>Order</strong> is set to 1, this action is the first to be executed.</td>
</tr>
<tr>
<td>Exclude Previous Recipients</td>
<td>Displays the <strong>Exclude Previous Recipients</strong> checkbox on the workflow progress screen. If the user selects this checkbox, a call list is created only for people who meet the group criteria and who've not yet been called.</td>
</tr>
</tbody>
</table>
Configuring workflow and escalation rule behavior

In a standard Sage CRM installation, workflow is activated for cases, solutions, opportunities, and leads by default. There are predefined workflows for these entities and workflow action buttons are displayed onscreen to the user. If you deactivate workflow for an entity, the workflow action buttons are no longer displayed.

You can manually activate workflow for campaigns, companies, and people, and then define your own workflows for these entities. You can also define workflows for a custom entity if you enabled workflow when you built the custom entity.

In addition to the standard opportunity workflow, there's a ready-to-use Quick Sale Workflow that's designed for products that don't require a complex sales cycle and can be sold in a few steps. You must activate the Quick Sale Workflow if you want to use it. For more information, see Editing a workflow.

Note: The status area on the summary screens for cases, solutions, opportunities, and leads is part of workflow. To update the status fields in this area, a user must progress the record through the workflow. If you deactivate workflow for these entities, a Progress button is displayed rather than the workflow actions, and a user can enter values in the status area.

If you're using escalation rules in your workflows or outside workflow, you must configure escalation settings. For more information, see About quick notifications and escalation rules.

You activate and deactivate workflow for specific entities and configure escalation settings as follows:

1. Click <My Profile> | Administration | Advanced Customization | Workflow & Escalation Configuration.
2. Click Change.
3. Complete the Workflow and escalation settings. Ensure you choose Yes for the entities that you want to activate workflow on.
4. Click Save. Workflow is now activated for the entities you selected above. You can create your workflows for these entities. For more information, see Building a workflow.

Workflow and escalation settings

The table below describes the fields on the Workflow & Escalation Configuration screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow for cases</td>
<td>Activates workflow for cases.</td>
</tr>
<tr>
<td>Workflow for solutions</td>
<td>Activates workflow for solutions.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Workflow for opportunities</td>
<td>Activates workflow for opportunities. In addition to the standard opportunity workflow, there's a ready-to-use Quick Sale Workflow that's designed for products that don't require a complex sales cycle and can be sold in a few steps. You must activate the Quick Sale Workflow to use it. For more information, see Editing a workflow.</td>
</tr>
<tr>
<td>Workflow for leads</td>
<td>Activates workflow for leads.</td>
</tr>
<tr>
<td>Workflow for campaigns</td>
<td>Activates workflow for campaigns. Sample campaign, wave, and wave item workflow names are prefixed with &quot;Sage&quot;.</td>
</tr>
<tr>
<td>Workflow for companies</td>
<td>Activates workflow for companies. Sage CRM does not include a sample workflow for companies so you must create your own workflow.</td>
</tr>
<tr>
<td>Workflow for people</td>
<td>Activates workflow for people. Sage CRM does not include a sample workflow for people so you must create your own workflow.</td>
</tr>
<tr>
<td>Escalation</td>
<td>When set to <strong>Yes</strong>:</td>
</tr>
<tr>
<td></td>
<td>• All escalation rules within workflow are activated.</td>
</tr>
<tr>
<td></td>
<td>• All escalation rules outside workflow, including the default escalation rules supplied with Sage CRM, are activated.</td>
</tr>
<tr>
<td></td>
<td>• The <strong>Reminder</strong> field on the <strong>Enter New Task</strong> and <strong>Enter New Appointment</strong> screens is enabled.</td>
</tr>
<tr>
<td></td>
<td>• Quick notifications are enabled. For more information, see About quick notifications and escalation rules.</td>
</tr>
<tr>
<td></td>
<td>• Escalation rules in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td></td>
<td>When escalation rules are activated, you must still enable each rule individually. For more information, see About quick notifications and escalation rules.</td>
</tr>
<tr>
<td>Notify interval (sec)</td>
<td>If you're not using the CRM Escalation Service, this is the minimum interval (in seconds) between the server polling clients for notification reminders or escalation rules.</td>
</tr>
<tr>
<td></td>
<td>If you are using the CRM Escalation Service, the minimum interval between polling is 5 minutes (300 seconds) by default.</td>
</tr>
<tr>
<td></td>
<td>The value set in <strong>Interval</strong> on an individual rule overwrites the value set in <strong>Notify interval</strong>.</td>
</tr>
<tr>
<td>Notification display count</td>
<td>The number of notifications displayed onscreen at any one time. If you set <strong>Notification display count</strong> to 20 and a user has 100 notifications, the number beside the <strong>Notifications</strong> icon on the top bar is 100. When the user clicks the icon, 20 notifications are displayed. When the user clicks <strong>Close All</strong>, the next 20 are displayed.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Escalation engine tuned for</td>
<td><strong>System Performance</strong>: Notifications are processed at the polling rate set in <strong>Notify interval</strong>. <strong>Immediate Delivery</strong>: The notification is processed when the communication, or associated entity record, is created or edited, and every time the system polls at the polling rate set in <strong>Notify interval</strong>.</td>
</tr>
<tr>
<td>Notify Email name</td>
<td>The name that appears on a notification email. For example, when an unsolved case is escalated and an email is sent to the team leader as part of a case workflow, this is the name in the <strong>From</strong> field of the email. For more information, see <strong>Send Email</strong>. If <strong>Notify email name</strong> and <strong>Notify email address</strong> are blank and the Escalation Service is disabled, the email address of the current user is used. When the Escalation Service is enabled, the email address of the current user is not applicable and you must enter a value in <strong>Notify email name</strong> and <strong>Notify email address</strong>.</td>
</tr>
<tr>
<td>Notify Email address</td>
<td>The valid email account that's used to send notification emails. For more information, see <strong>Send Email</strong>. If <strong>Notify email name</strong> and <strong>Notify email address</strong> are blank and the Escalation Service is disabled, the email address of the current user is used. When the Escalation Service is enabled, the email address of the current user is not applicable and you must enter a value in <strong>Notify email name</strong> and <strong>Notify email address</strong>.</td>
</tr>
<tr>
<td>Default targets for high priority reminder messages</td>
<td>The targets to which high priority reminder messages are sent. Options are desktop email, mobile email, and SMS.</td>
</tr>
<tr>
<td>Default targets for normal priority reminder messages</td>
<td>The targets to which normal priority reminder messages are sent. Options are desktop email, mobile email, and SMS.</td>
</tr>
<tr>
<td>Default targets for low priority reminder messages</td>
<td>The targets to which low priority reminder messages are sent. Options are desktop email, mobile email, and SMS.</td>
</tr>
<tr>
<td>Maximum SLA Actions</td>
<td>The number of action fields that are available when setting up SLAs. This number typically corresponds to the number of stages in the Cases workflow. The default value is 5.</td>
</tr>
<tr>
<td>Use Escalation Service</td>
<td><strong>Yes</strong>: The CRM Escalation Service runs escalation rules even when no user is logged on to Sage CRM. This is a Windows service that you turn on in **Control Panel</td>
</tr>
</tbody>
</table>
Activating workflow for secondary or custom entity

You can activate workflow for secondary and custom entities that are completely or partially managed by custom application extensions (ASP pages or .NET). The screens for existing system entities do not check for workflow. The following example activates workflow for a custom entity called Project.

1. Add a proj_workflowid column to the Project table in the database.
2. Set datatype to integer.
3. In the custom_tables metadata table, enter a value for Project bord_workflowidfield.
   ```sql
   select * from custom_tables where bord_name='project'
   update custom_tables
   set bord_workflowidfield = 'proj_workflowid'
   where bord_name='project'
   ```
4. Refresh the system metadata. The Project table appears in the list of available tables when you create a new workflow rule.

Building a workflow

- Creating a workflow
- Editing a workflow
- Creating a workflow state
- Creating a workflow rule
- Adding states and rules to a workflow
- Deleting a workflow

Creating a workflow

1. Click <My Profile> | Administration | Advanced Customization | Workflow.
2. Click New Workflow.
3. Enter a description.
4. Leave Enabled unchecked. You can't edit a workflow that's enabled.
5. Click Save. The workflow design page displays one default entry state from which you can build your workflow tree.
6. Click New State to add a state to the workflow. For more information, see Creating a workflow state.
7. Click New Rule to add a rule to the workflow. For more information, see Creating a workflow rule.
8. You can add states and rules to the workflow now or later. For more information, see Adding states and rules to a workflow.
9. Click Preview List to see a script preview of the workflow. You can use this script to create a component. Preview List is displayed only if you have the Extensibility Module. For more information, see the Developer Help on the Sage CRM Help Center.
10. Click **Cancel** to return to the workflow design screen. The new workflow is displayed in the list of workflows.

**Note:** You should fully test workflows in a test environment before you enable workflows on your production system.

### Editing a workflow

1. Click **<My Profile> | Administration | Advanced Customization | Workflow**.
2. Click the workflow you want to edit.
3. If the workflow is enabled, click **Edit Workflow**. This disables the workflow so you can edit it.
4. To change the workflow description, click **Change Workflow**.
   a. Enter the new description.
   b. Ensure Enabled is unchecked. You can't edit a workflow that's enabled.
   c. Click **Save**.
5. To delete a state or rule from the **Available States** palette or a rule from the **Available Rules** palette, click the state or rule in the palette. You cannot delete a state or rule that's used in a workflow tree.
   a. Click **Delete**.
   b. Click **Confirm Delete**.
   c. Click **Save**.
6. Drag new states and rules onto the tree. For more information, see [Adding states and rules to a workflow](#).
7. To remove a state or rule from the workflow tree, click the state or rule in the workflow tree and drag and drop it onto the dustbin icon. When you remove a state or rule, all states and rules hanging from it are also removed. Click **OK**.
8. Click **Save** to save any changes you've made.
9. Click **Activate Workflow** to activate the workflow. You should fully test all workflows on a Sage CRM test installation before you enable them on your production system.
10. Click **Cancel** to return to the workflow list.

### Creating a workflow state

1. Click **<My Profile> | Administration | Advanced Customization | Workflow**.
2. Click the workflow to which you want to add the new state.
3. Click **New State**.
4. Enter a state name and a short description.
5. To specify that this is an entry state into the workflow, select **Entry State**. For more information, see [Workflow states](#).
6. Click Save. The new state is displayed on the Available States palette.
7. Continue to add states for this workflow and then click Save.

Creating a workflow rule

1. Click <My Profile> | Administration | Advanced Customization | Workflow.
2. Click the workflow to which you want to add the rule.
3. Click New Rule.
4. To clone an existing rule, ensure the rule is available for cloning. For more information, see Making a workflow rule available for cloning.
   a. Choose the rule from Clone an existing rule.
   b. If you want to use the rule actions, choose Yes from Choose to clone the actions associated with the Rule.
   c. Enter a Rule Name.
   d. Select Rule Enabled.
   e. Click Save.
5. To create a completely new rule, complete the Workflow rule fields and click Save. Ensure the rule is enabled.
   Tip: If all workflow actions in your rule are marked as hidden, the rule moves to the next state without displaying the tracking notes option.
6. To add actions to the rule, click the rule in the Available Rules palette. If you add actions to a workflow rule that uses a .NET DLL or ASP page, the actions are not executed. The .NET method or ASP page is executed instead.
   a. Scroll to the end of the screen and click New.
   b. Click the action you want to add. Not all workflow actions are compatible with each workflow rule. For a list of actions that work with each rule type, see Workflow actions.
   c. Complete the action fields. For more information, see the relevant action in Workflow actions.
   d. Click Save. The action is listed in the Workflow Actions for this Rule table.
7. Click Save to return to the workflow tree and add the rule to a workflow. For more information, see Adding states and rules to a workflow.

Making a workflow rule available for cloning

1. Click <My Profile> | Administration | Advanced Customization | Workflow.
2. Click the workflow that contains the rule you want to clone.
3. Click the rule in the Available Rules palette.
4. Select Available For Cloning
5. Click Save.
Workflow rule fields

Tip: You can set workflow conditions using the **Restricted to Team**, **JavaScript Condition**, and **Trigger SQL Clause** fields on a rule, and by adding JavaScript to the **Create Script**, **OnChange Script**, and **Validate Script** fields on some actions. You can also use field security to set access right to individual fields on a screen. For more information, see Adding security types for a field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clone an existing rule</td>
<td>The existing rule that the new rule is based on.</td>
</tr>
<tr>
<td>Clone the actions associated with the Rule</td>
<td>Clones the actions of the existing rule selected in <strong>Clone an existing rule</strong>.</td>
</tr>
</tbody>
</table>
| Table or view                               | **Table**: The entity table that’s checked to see if the rule conditions are met.  
**View**: The table view that’s checked to see if the rule conditions are met.  
Views let you customize the set of fields within the JavaScript condition.  
There may be significant performance improvements if you use a view that includes only relevant records rather than performing a whole table scan.  
If you select **View**, ensure the correct entity is displayed in **Table**.  
A workflow update action occurs only on the table on which the workflow is based.  
To update multiple tables at once, use an ASP page or an Execute SQL workflow action. |
| Rule Name                                   | The name of the new rule.                                                    |
| Available for Cloning                       | Includes the new rule in the **Available for Cloning** list so you can base other rules on this rule and its associated actions. |
| Rule Enabled                                | Enables the rule. You must enable the rule if you want to add it to a workflow. |
| Type                                        | The type of workflow rule. For more information, see Workflow rules.         |
| Alternative Image for Rule                 | The image that’s displayed in the UI if this rule is visible to the end user.  
The default image is a small green bullet (WORKFLOWDEFAULT.GIF) followed by the rule name.  
To add a new GIF, ensure it’s saved in ...WWRoot\Themes\Img\[theme name]\Buttons in the Sage CRM install and choose it from this drop-down. |
| Restricted to Team                         | Restricts the rule to users who belong to this primary team. This is the most simple way of limiting access to the rule.  
To restrict the rule to members of two teams, or to create more complex restrictions, use JavaScript in **Javascript condition**. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>The order in which the field appears on screen when progressing a workflow rule.</td>
</tr>
<tr>
<td>Interval</td>
<td>The interval (in minutes) at which the rule runs. You can use this field to fire rules repeatedly within a certain time frame. For example, for high priority cases you could specify that a reminder email is sent between 7am and 9am every day to the assigned user. If a specific rule takes longer to fire than other rules, it's a good idea to specify a value in this field. This value overwrites the value in Notify Interval in Workflow &amp; Escalation Configuration. For more information, see Workflow and escalation settings.</td>
</tr>
<tr>
<td>Custom File Name</td>
<td>The name of the custom file that's linked to the new rule. The custom file must be saved in the CustomPages subdirectory of your Sage CRM install. If you add workflow actions to a workflow rule that uses a .NET DLL or ASP page, the workflow actions are not executed. The .NET method or ASP page is executed instead. You cannot link a .NET DLL or ASP page to an escalation rule.</td>
</tr>
<tr>
<td>Method Name</td>
<td>The name of the .NET method that's called. If you add actions to a workflow rule that uses a .NET DLL, the actions are not executed. The .NET method is executed instead. You cannot link a .NET DLL to an escalation rule.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Javascript condition  | The JavaScript condition that determines if the workflow button for the rule is displayed. The workflow button is hidden when the condition is false, and is displayed when the condition is true. Rule actions occur only when this JavaScript condition is met. You can use # codes in JavaScript conditions. For more information, see Using the ## and # symbols. For example, you can specify that a specific person must approve a quote, or that an opportunity forecast must be above $10,000 to progress from a lead to a qualified prospect. JavaScript conditions can reference fields from any entity created by the workflow using one of the following actions with a label:  
  - Create Task  
  - Create Opportunity  
  - Create Case  
  - Create Solution  
  - Create Lead  
  
  The following JavaScript condition limits access to the workflow button to the Support team (ID 1) and Operations team (ID 5). These IDs are taken from the Channel table in the demo data.  
  ```javascript
  var intTeamID = CurrentUser.user_primarychannelid;
  if (intTeamID == 1 || intTeamID == 5) {
    Valid = true;
  } else {
    Valid = false;
  }
  ```

Sage CRM - System Administrator Guide
**Field** | **Description**
---|---
Trigger SQL Clause | A condition in the form of an SQL WHERE clause. Escalation rule actions occur only when the condition is met. The WHERE term is assumed so you don’t need to add it to this field. You can use # codes within SQL trigger clauses conditions. For more information, see Using the ## and # symbols.

When you create a notification rule, the user must be able to dismiss and snooze the notification. The WHERE clause must include ‘and xxxx_datetimefield < #T’, and the action must use the same ‘xxxx_datetimefield’ name. When the user dismisses the notification, the field specified in the action is set to null. When the user snoozes the notification, the field specified in the action is set to the current time plus the number of snooze minutes.

When you create an email rule, you must include a stop clause so the email is sent only once. Add a field to the table to flag if the email has been sent. The WHERE clause must include ‘and xxxx_emailsent = null’. In addition to the email action, add a field action to Set Column Value that sets xxxx_emailsent to Y.

For more information, see Trigger clause examples.

**JavaScript condition examples**

The predefined workflows for cases, solutions, opportunities, and leads contain examples of Javascript conditions.

<table>
<thead>
<tr>
<th>Entity name</th>
<th>Rule name</th>
<th>Example script</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity</td>
<td>Reassign</td>
<td>Valid = (oppo_stage != 'Closed');</td>
</tr>
<tr>
<td>Cases</td>
<td>Reassign</td>
<td>Valid = ((case_stage!='Closed') &amp;&amp; (case_stage != 'Logged') &amp;&amp; (case_stage=='Investigating'));</td>
</tr>
<tr>
<td>Lead</td>
<td>Reassign Lead</td>
<td>Valid=(lead_status == 'In Progress');</td>
</tr>
<tr>
<td>Lead</td>
<td>Edit Lead</td>
<td>Valid=(lead_status == 'In Progress');</td>
</tr>
</tbody>
</table>

You can directly reference the fields of the workflowed record and return the field value. You cannot directly reference the fields of other records that are in context of the workflowed record. Instead, you can use CRM.GetContextInfo() to reference these fields and get data that's in context of the workflowed record.
You can use these techniques on custom entities to reference the fields of the workflowed record and return the field value.

The following is an example JavaScript condition on a custom entity called Project:

```javascript
if (proj_stage!=='Planning')
{
Valid =false;
}
```

The following is an example JavaScript condition on a custom entity called Project that's a child of Company:

```javascript
if (proj_stage == 'Planning' && CRM.GetContextInfo("company","comp_type")=='Customer') {
Valid = false;
} else {
Valid = true;
}
```

### Using the ## and # symbols

You can use ## symbols in workflow actions to add information from the related entity or the user table.

- You can use ## symbols in the JavaScript Conditions of primary, transition, conditional, and global rules, and the Trigger SQL Clause of escalation rules to define conditions. When you use ## symbols in a condition or statement, actual database values are substituted when the metadata is parsed. For example, the following SQL statement compares the actual Campaign Wave Activity ID with the value in a Communications Wave Activity field.

```sql
Update Communication set Comm_Deleted=1 where Comm_WaveItemId=#WaIt_WaveItemId#
```

- If you use ## symbols in the body of an email, SMS, onscreen message, or notification, the translations are used.

- You can use the # symbol before certain letters to run internal function calls that return a concrete value. For example, the following script uses #T and #U to compare the current time and user with the values of fields containing escalation information.

```javascript
Escl_DateTime<#T And Escl_UserID=#U AND Upper(RTRIM(comm_status))=N'PENDING'
```

<table>
<thead>
<tr>
<th>Code</th>
<th>Returned value</th>
</tr>
</thead>
<tbody>
<tr>
<td>#U</td>
<td>Current logged on user as an ID.</td>
</tr>
<tr>
<td>#L</td>
<td>Current logged on user as a string.</td>
</tr>
<tr>
<td>#C</td>
<td>Current logged on team as an ID.</td>
</tr>
<tr>
<td>Code</td>
<td>Returned value</td>
</tr>
<tr>
<td>------</td>
<td>----------------</td>
</tr>
<tr>
<td>#D</td>
<td>Current logged on team as a string.</td>
</tr>
<tr>
<td>#T</td>
<td>Current time.</td>
</tr>
<tr>
<td>#R</td>
<td>Recent list information.</td>
</tr>
<tr>
<td>#O</td>
<td>Current opportunity ID.</td>
</tr>
</tbody>
</table>

Adding states and rules to a workflow

1. Click `<My Profile> | Administration | Advanced Customization | Workflow`.
2. Click the workflow to which you want to add the states and rules. Ensure the workflow is not enabled. For more information, see Editing a workflow.
3. Drag and drop states from the Available States palette onto the lower drop circle of the rules to build the workflow tree. For example, Lead, Prospect, Quoted, Negotiation, Contract, Closed.
   - If the state you need doesn't already exist, click New State to create it. For more information, see Creating a workflow state.
   - The first state follows on from the Start state and a transition rule is automatically created to link the two states. The name of the transition rule is [name of the source state] to [name of the destination state].
   - If you drop the same state onto the tree more than once, the state icon changes to indicate a duplicate state. If you hover over one occurrence of the state, the duplicate states are highlighted.
4. To turn a transition rule into a different type of rule, click the rule, update the Workflow rule fields and click Save.
5. Drag a rule from the Available Rules palette onto the lower drop circle of the first state.
   - If the rule you need doesn't already exist, click New Rule to create it. For more information, see Creating a workflow rule.
   - When you drop a conditional rule onto a state, the list of rule actions is divided in two. The actions on the left are executed when the condition is True and the actions on the right are executed when the condition is False. It's a good idea to add a Show Message on Screen action to the list of False actions, to tell the user why the workflow isn't progressing to the next state.
   - You can drop more than one transition rule onto a state to let the user determine which rule is applied to the record.
   - You can drop enabled rules only. You enable a rule in the Workflow rule fields.
   - You must ensure that all rules on the workflow lead to a valid state.
6. Click Save to save the workflow tree.
7. Click Activate Workflow to activate the workflow. You should fully test all workflows on a Sage CRM test installation before you enable them on your production system.
Deleting a workflow

1. Click <My Profile> | Administration | Advanced Customization | Workflow.
2. Click the workflow you want to delete.
3. Click Delete.
4. Click Confirm Delete.
5. Click Continue to return to the workflow design screen.
Quick notifications and escalations

- About quick notifications and escalation rules
- Creating a quick notification
- Working with predefined escalation rules
- Enabling an escalation rule
- Creating an escalation rule

About quick notifications and escalation rules

You can set up quick notifications and escalation rules to ensure that users never miss important information.

For example, a sales manager could use quick notifications and escalation rules configured for each sales representative based on their targets and dates. The manager could identify leads that must be followed up within one week to meet KPIs and generate automatic reminders for their sales reps to follow up with these leads.

A customer service manager might use onscreen notifications to share product information such as special offers and release dates, or to share critical real-time data so the team can be pro-active about resolving cases and identifying upsell opportunities.

Differences between quick notifications and escalation rules

You define quick notifications on the Notifications tab of a main entity. A quick notification can contain up to five conditions and is used outside the context of workflow. If some or all of the conditions are satisfied, a notification message is displayed onscreen or sent by email. Quick notifications are simple and quick to define and don't require knowledge of SQL. Instead, you define the WHERE clause using simple UI tools. When you save a quick notification, all necessary records are automatically created in the database workflow tables. Quick notifications are user based.

Escalation rules are usually more complex than quick notifications and can be used in a workflow or outside the context of workflow. In general, you use an escalation rule to create a notification that contains more than five conditions or contains a complex trigger SQL clause. If some or all of the conditions are satisfied or the clause is triggered, a notification message is displayed onscreen or sent by email, values are updated, or SQL is executed. If an escalation rule is included in a workflow, it's applied only to records in the correct state. Escalation rules are time based.

The conditions in quick notifications and escalation rules are expressed using SQL. They are governed by the same escalation mechanism and their behavior is logged in the escalation log and SQL log.
Setting up quick notifications

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>For quick notifications to work, you must enable **Workflow &amp; Escalation Configuration</td>
<td>Workflow and escalation settings</td>
</tr>
<tr>
<td>Configuration</td>
<td>Escalation. This setting also enables the <strong>Reminder</strong> field for new tasks and appointments.</td>
</tr>
<tr>
<td>You can specify how many quick notifications are displayed on screen at once.</td>
<td>Workflow and escalation settings</td>
</tr>
<tr>
<td>Create a quick notification and specify what happens when the conditions of the rule are met.</td>
<td>Creating a quick notification</td>
</tr>
</tbody>
</table>

Setting up escalation rules

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>To use the Escalation service to run escalation rules, you must first turn the service on in **Control Panel</td>
<td>Workflow and escalation settings</td>
</tr>
<tr>
<td>Administrative Tools</td>
<td>Services and then enable the service in **Workflow &amp; Escalation Configuration</td>
</tr>
<tr>
<td>For escalation rules to work, you must enable <strong>Escalation</strong> in</td>
<td>Workflow and escalation settings</td>
</tr>
<tr>
<td>**Workflow &amp; Escalation Configuration</td>
<td>Escalation.</td>
</tr>
<tr>
<td>When escalation rules are activated, you must enable each rule individually.</td>
<td>Enabling an escalation rule</td>
</tr>
<tr>
<td>You can specify how often new escalations are triggered and how many notifications are displayed on screen at once.</td>
<td>Workflow and escalation settings</td>
</tr>
<tr>
<td>Predefined escalation rules display onscreen notifications to the system administrator but you can configure them to send the information to a different user.</td>
<td>Working with predefined escalation rules</td>
</tr>
<tr>
<td>You can define a new escalation rule outside the context of workflow.</td>
<td>Creating an escalation rule</td>
</tr>
<tr>
<td>You can create escalation rules and use the escalation table for custom entities. To do this, you must manage the data in the escalation table with table level scripts and build a custom view based on existing escalation rules. For example, you could use a <code>PostInsertRecord()</code> event function to insert a record into the escalation table.</td>
<td>Introduction to view customization Table and entity level scripts in the Developer Help</td>
</tr>
</tbody>
</table>
Creating a quick notification

1. Click <My Profile> | Administration | Advanced Customization | Workflow & Escalation Configuration.
2. Ensure Escalation is set to Yes.
3. Click <My Profile> | Administration | Customization | Primary Entity | <Entity>.
4. Click the Notifications tab.
   - To display the notification on screen, click New On Screen Notification. The message is displayed for the specified user when the conditions you add to the rule are satisfied.
   - To send the notification by email, click New Email Notify. An email is sent to the user you specify when the conditions you add to the rule are satisfied.
5. Complete the Notifications fields.
6. Click Save.

Quick notification fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Name</td>
<td>The name of the notification rule.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Enables the rule.</td>
</tr>
<tr>
<td>And / Or All</td>
<td><strong>And</strong>: The notification is created only when all the specified conditions are met. <strong>Or</strong>: The notification is created when one of the specified conditions is met.</td>
</tr>
<tr>
<td>Field</td>
<td>The field (database column) on which the condition script is executed.</td>
</tr>
<tr>
<td>Condition</td>
<td>The operator that’s used in the condition script.</td>
</tr>
<tr>
<td>Value</td>
<td>The value of Field that’s used in the condition script.</td>
</tr>
<tr>
<td>Choose Field to insert into the Notification</td>
<td>Click a merge field to include it in the notification message.</td>
</tr>
<tr>
<td>Notify User</td>
<td>The user who is notified when the conditions are met.</td>
</tr>
<tr>
<td>Notification Message</td>
<td>The notification text that’s displayed to the user. This is a required field. You can insert merge fields from Choose Field to insert into the Notification. You can format the message using HTML tags such as &lt;br&gt; to force new lines, or &lt;b&gt; and &lt;strong&gt;.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Template</td>
<td>The email template used for email notifications. Templates usually contain standard content and field codes.</td>
</tr>
<tr>
<td>From</td>
<td>The email address from which the email notification is sent. If you leave this field blank, the name and email address in Notify email name and Notify email address are used. For more information, see Workflow and escalation settings.</td>
</tr>
<tr>
<td>Reply to</td>
<td>The email address to which replies are sent. This field is available only if you have permission to send emails from other accounts.</td>
</tr>
<tr>
<td>To</td>
<td>The email recipients. To add a recipient to the To, CC, or BCC fields, select the recipient in the search box on the right side of the screen and click the green left arrow beside the To, CC, or BCC field. You can add only one recipient at a time.</td>
</tr>
<tr>
<td>CC</td>
<td>The recipients who receive a copy of the email.</td>
</tr>
<tr>
<td>BCC</td>
<td>The recipients who receive a blank carbon copy of the email.</td>
</tr>
<tr>
<td>Subject</td>
<td>The email subject.</td>
</tr>
<tr>
<td>Choose Field to insert into the Email</td>
<td>Click a merge field to include it in the email message.</td>
</tr>
<tr>
<td>Email message</td>
<td>The email text that's displayed to the user. This is a required field. You can insert merge fields from Choose Field to insert into the Email. You can format the message using HTML tags such as &lt;br&gt; to force new lines, or &lt;b&gt; and &lt;strong&gt;.</td>
</tr>
</tbody>
</table>

Working with predefined escalation rules

Predefined escalation rules display onscreen notifications to users. For example, the Communication Reminder escalation rule sends an onscreen reminder to users associated with a task or meeting that the event will occur soon. For more information, see Predefined escalation rules. By default, the notifications are sent to the current user but you can send the information to a different user. You need the user ID to do this.

1. To find a user ID, click <My Profile> | Administration | Users | Users.
2. Search for the relevant user and click the user link in the search results. The URL at the top of the screen contains the user ID.
3. Click <My Profile> | Administration | Advanced Customization | Escalation.
4. Enter search criteria in the Filter fields. The following example finds all enabled escalation rules for lost opportunities.
   - Choose Opportunity in Table Name.
   - Enter Lost in Rule Name.
- Enter Y in **Rule Enabled**.
5. Click **Filter**.
6. Click the rule.
7. Add the user ID to the start and end of the SQL trigger clause. The following example sends the information to a user with ID 5.
   ```sql
   vNotificationOpportunity.User_rollupto = 5 AND
   vNotificationOpportunity.oppo_opportunityid in (select WkIn_CurrentRecordId from dbo.WorkflowInstance where WkIn_WorkflowId = 10
   AND WkIn_CurrentStateId = 53 AND WkIn_CurrentEntityId = 10) AND
   ((Escl_EscalationId is NULL ) OR (Escl_WorkflowRuleId <> 10163) OR
   ((Escl_WorkFlowRuleId = 10163) AND Escl_Datetime < #T AND Escl_UserId = 5))
   ```
8. To use the rule, select **Rule Enabled** if it's not already selected.
9. Click **Save**.

### Predefined escalation rules

<table>
<thead>
<tr>
<th>Escalation rule</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly Quota Remaining</td>
<td>Notify a sales user at the end of each month about the percentage and amount of their remaining quota for the quarter.</td>
</tr>
<tr>
<td>Daily Quota Remaining</td>
<td>Notify a sales user daily about the percentage and amount of their remaining quota for the month.</td>
</tr>
<tr>
<td>Pipeline Update</td>
<td>Notify a sales user every two weeks about the value of their pipeline for this quarter, compared to their forecast total for the quarter.</td>
</tr>
<tr>
<td>Opportunity Close Date Approaching</td>
<td>Notify the assigned user of an opportunity that the opportunity close date is in five days.</td>
</tr>
<tr>
<td>Unassigned Lead</td>
<td>Notify sales managers when a new lead has been unassigned for more than five days.</td>
</tr>
<tr>
<td>High Value Opportunity Won</td>
<td>Notify sales team members and sales managers when a high value deal is won. The system administrator can configure the high value opportunity amount.</td>
</tr>
<tr>
<td>High Value Opportunity Created</td>
<td>Notify sales managers and send them an email when a high value opportunity is created. This uses <strong>Total Quote Value</strong> on the opportunity. The system administrator can configure the high value opportunity amount.</td>
</tr>
<tr>
<td>Quote Discount Value too large</td>
<td>Notify sales managers and send them an email when a quote line item discount exceeds 40%.</td>
</tr>
<tr>
<td><strong>Escalation rule</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unassigned Opportunity</td>
<td>Notify sales managers when a new opportunity has been unassigned for more than five days.</td>
</tr>
<tr>
<td>Lost Opportunities</td>
<td>Notify the sales manager when a deal has been lost.</td>
</tr>
<tr>
<td>Order repricing notification</td>
<td>Notify a sales user when the total of an order changes.</td>
</tr>
<tr>
<td>Quote repricing notification</td>
<td>Notify a sales user when the total of a quote changes.</td>
</tr>
<tr>
<td>Order Synch error notification</td>
<td>Notify a user when there's an error synchronizing an order with the BMS application.</td>
</tr>
<tr>
<td>Quote Synch error notification</td>
<td>Notify a user when there's an error synchronizing a quote with the BMS application.</td>
</tr>
<tr>
<td>Account Synch error notification</td>
<td>Notify a user when there's an error synchronizing an account with the BMS application.</td>
</tr>
<tr>
<td>Exchange Integration Notification</td>
<td>Notify a user when the system administrator has enabled them to automatically synchronize with Microsoft Exchange.</td>
</tr>
<tr>
<td>Email Blast Failure Notice</td>
<td>Notify a sales user when an E-marketing email blast is not successfully sent.</td>
</tr>
<tr>
<td>Campaign Over Budget</td>
<td>Notify a sales user when an E-marketing campaign has exceeded the approved budget limit.</td>
</tr>
<tr>
<td>Campaign Close To Budget</td>
<td>Notify a sales user when an E-marketing campaign exceeds 90% of the approved budget limit.</td>
</tr>
<tr>
<td>Backup Failure Notice</td>
<td>Notify a system administrator when a Sage CRM backup fails.</td>
</tr>
<tr>
<td>Backup Completed Notice</td>
<td>Notify a system administrator when a Sage CRM backup successfully completes.</td>
</tr>
<tr>
<td>MailChimp list upload message</td>
<td>Notify a user when a Sage CRM group of contacts is successfully uploaded to the MailChimp list.</td>
</tr>
<tr>
<td>Communication Reminder</td>
<td>Notify the assigned user of a communication task that the due date is approaching.</td>
</tr>
<tr>
<td>Quote Expiry</td>
<td>Notify the assigned user of a quote that the quote expiry date is in five days.</td>
</tr>
<tr>
<td>Email Reminder</td>
<td>Notify the assigned user of an email task that the due date is approaching.</td>
</tr>
</tbody>
</table>
Enabling an escalation rule

When escalation rules are activated, you must still enable each rule individually.

1. Click My Profile > Administration > Advanced Customization > Escalation.
2. Click the escalation rule.
3. Select Rule Enabled and click Save.

Creating an escalation rule

To create an escalation rule that's outside the context of workflow:

1. Configure escalation rule behavior. For more information, see Configuring workflow and escalation rule behavior.
2. Click <My Profile> | Administration | Advanced Customization | Escalation.
3. Click New.
4. To clone an existing rule, ensure the rule is available for cloning. For more information, see Making an escalation rule available for cloning.
   a. Choose the rule from Clone an existing rule.
   b. If you want to use the rule actions, choose Yes from Choose to clone the actions associated with the Rule.
   c. Enter a Rule Name.
   d. Select Rule Enabled.
   e. Click Save.
5. To create a completely new rule, complete the Escalation rule fields. Ensure the rule is enabled.
6. Click Save. The new escalation rule is displayed on the Escalation screen.
7. To add actions to the rule, click the rule link. If you add actions to a workflow rule that uses a .NET DLL or ASP page, the actions are not executed. The .NET method or ASP page is executed instead.
   a. Scroll to the end of the screen and click New.
   b. Click the action you want to add. For a list of actions that work with escalation rules, see Workflow actions.
   c. Complete the action fields. For more information, see the relevant action in Workflow actions.
   d. Click Save.
8. Continue to add actions and click Save when you are finished.
# Escalation rule fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clone an existing rule</td>
<td>The existing rule that the new rule is based on.</td>
</tr>
<tr>
<td>Clone the actions associated with the Rule</td>
<td>Clones the actions of the existing rule selected in <strong>Clone an existing rule</strong>.</td>
</tr>
<tr>
<td>Table or view</td>
<td><strong>Table</strong>: The table that's checked to see if the rule conditions are met. <strong>View</strong>: The table view that's checked to see if the rule conditions are met. Views let you customize the set of fields within the JavaScript condition. It's good practice to base escalation rules on views rather than tables to reduce the number of records that are checked. If you select <strong>View</strong>, ensure the correct entity is displayed in <strong>Table</strong>.</td>
</tr>
<tr>
<td>Rule Name</td>
<td>The name of the new rule.</td>
</tr>
<tr>
<td>Available for Cloning</td>
<td>Includes the new rule in the <strong>Available for Cloning</strong> list so you can base other rules on this rule and its associated actions.</td>
</tr>
<tr>
<td>Rule Enabled</td>
<td>Activates the rule.</td>
</tr>
<tr>
<td>Type</td>
<td>A read only field that's set to <strong>Escalation Rule</strong>.</td>
</tr>
<tr>
<td>Alternative Image for Rule</td>
<td>The image that's displayed in the UI if this rule is visible to the end user. The default image is a small green bullet (WORKFLOWDEFAULT.GIF) followed by the rule name. To add a new GIF, ensure it's saved in ...WWWRoot\Themes\Img[theme name]\Buttons in the Sage CRM install and choose it from this drop-down.</td>
</tr>
<tr>
<td>Restricted to Team</td>
<td>Restricts the rule to users who belong to this primary team.</td>
</tr>
<tr>
<td>Order</td>
<td>The order in which the field appears on screen when progressing a workflow rule.</td>
</tr>
<tr>
<td>Interval</td>
<td>The interval (in minutes) at which the escalation rule runs. If a specific escalation rule takes longer to fire than other rules, it's a good idea to specify a value in this field. This value overwrites the value in <strong>Notify Interval</strong> in <strong>Workflow &amp; Escalation Configuration</strong>. For more information, see Workflow and escalation settings.</td>
</tr>
<tr>
<td>.NET</td>
<td>Not applicable to escalation rules.</td>
</tr>
<tr>
<td>Custom File Name</td>
<td>Not applicable to escalation rules.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Method Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trigger SQL Clause</td>
<td>A condition in the form of an SQL WHERE clause. Rule actions occur only when the condition is met. The WHERE term is assumed so you don't need to add it to this field. You can use # codes within SQL trigger clauses conditions. For more information, see Using the ## and # symbols. When you create a notification rule, the user must be able to dismiss and snooze the notification. The WHERE clause must include 'and xxxx_datetimefield &lt; #T', and the action must use the same 'xxxx_datetimefield' name. When the user dismisses the notification, the field specified in the action is set to null. When the user snoozes the notification, the field specified in the action is set to the current time plus the number of snooze minutes. When you create an email rule, you must include a stop clause so the email is sent only once. Add a field to the table to flag if the email has been sent. The WHERE clause must include 'and xxxx_emailsent = null'. In addition to the email action, add a field action to Set Column Value that sets xxxx_emailsent to Y. For more information, see Trigger clause examples.</td>
</tr>
</tbody>
</table>

---

### Trigger clause examples

The following are examples of SQL that you can enter in Trigger SQL Clause.

- In the SQL below, #L indicates that notifications are used only if the user is DolanW.
  
  ```sql
  CmLi_Comm_NotifyTime<#T AND cmli_comm_userid=#U AND Comm_Status='Pending' AND #L = 'DolanW'
  ```

- In the SQL below, #C indicates that the user is notified if team is their current team. It also checks that team is null, as Team may not be a mandatory field.
  
  ```sql
  CmLi_Comm_NotifyTime<#T AND cmli_comm_userid=#U AND Comm_Status='Pending'
  AND Comm_ChannelID = #C OR Comm_ChannelID IS NULL)
  ```

- The SQL below specifies that the escalation rule runs only between 7am and 6pm, and does not run on weekends.
  
  ```sql
  (... existing SQL triggering clause) AND datepart(hour, current_timestamp)<'18'
  AND datepart(hour, current_timestamp)>'7'
  AND DATENAME(WEEKDAY, GETDATE()) <> 'Saturday'
  AND DATENAME(WEEKDAY, GETDATE()) <> 'Sunday'
  ```
- The SQL below notifies a user if a record has been stuck at a certain stage for 14 days.
  
  \[
  \text{DATEDIFF(day, case_updateddate, getdate())>14} \\
  \text{AND (case_stage=}1\text{ OR case_stage=}2\text{) AND case_assigneduserid=#U}
  \]

- The SQL below is taken from the Email Reminder escalation rule. It uses a stop clause (CmLi_SMSMessageSent) to prevent the rule firing repeatedly. The email message is sent only when the field is null. When the email is sent, the field is set to Y which prevents the rule firing again.
  
  \[
  \text{(CmLi_Comm NotifyTime<#T)} \\
  \text{AND(UPPER(RTRIM(Comm_Status)))=UPPER(RTRIM(N'Pending')))} \\
  \text{AND(CmLi_SMSMessageSent IS NULL)} \\
  \text{AND(UPPER(RTRIM(Comm_SMSNotification)))=UPPER(RTRIM(N'Y'))})
  \]

Making an escalation rule available for cloning

1. Click <My Profile> | Administration | Advanced Customization | Escalation.
2. Click the rule that you want to clone.
4. Click Save.
Sage CRM data

- Deduplication
- Data Upload
- Products
- Multicurrency support
- Sales Forecasts
- Related entities
Deduplication

- About deduplication
- Enabling deduplication
- Customizing deduplication screens
- Setting up match rules
- Creating a Company Name Cleanup replace list
- Creating a Company Name Cleanup remove list

About deduplication

Deduplication aims to prevent the user from adding duplicate entries by searching for similar entries and warning the user before the new record is added. You can use the Merge functionality, described in the User Guide, to clean the data if duplication has already occurred.

Deduplication is enabled by default if you select Install demo data during the Sage CRM installation. If you don't select this option, deduplication is disabled by default.

When deduplication is enabled, Sage CRM searches for duplicate records on Company, Person, Lead and Account entities. Deduplication on these entities is based on the following fields and associated match rules:

- Company - match rules of type "contains" on Company Name
- Person - match rules of type "contains" on Person Last Name.
- Lead - match rules of type "contains" on Lead Company Name and Lead Person Last Name.
- Accounts - match rules of type "contains" on Account Name in some integrated environments.

Enabling deduplication

1. Click <My Profile> | Administration | System | System Behavior.
2. Click Change. The System Behavior page is displayed.
3. Ensure that Deduplication is set to Yes.
4. To specify that the Lead deduplication rules look for matches on both the Lead Company Name and Lead Person Last Name fields, choose And from Deduplication Rule. To specify that the dedupe rules look for matches on either of these fields, choose Or.
5. Click Save.

Before you use deduplication on Company or Person records, you can further customize the deduplication screens and set up match rules for the entities on which you want deduplication to work. When deduplication is enabled, two match rules are configured by default for the Lead Company Name and Lead Person Last Name.
Name fields on the Lead deduplication screen so you don't need to customize this screen or set up match rules.

Customizing deduplication screens

When deduplication is enabled, a new deduplication search screen is displayed when a user clicks New and selects Person, Company, or Lead. You can customize deduplication screens. For example, you can add fields from the Address, Person, and Company tables to the Company Dedupe Search Screen. This is usually a subset of core company information such as Company Name, Address 1, and Zip Code.

When deduplication is enabled, two match rules are configured by default for the Lead Company Name and Lead Person Last Name fields on the Lead deduplication screen so you don't need to customize this screen or set up match rules.

In addition, when you click Add Contacts in Microsoft Outlook to add contacts to Sage CRM, the match rules applied to the Sage CRM fields are applied to the corresponding Outlook fields, triggering a warning if duplication is detected.

1. Click <My Profile> | Administration | Customization | Primary Entities | Company | Screens.
2. Click the pencil icon in the Customize column beside Company Dedupe Search Screen.
3. Add the fields that you want to appear on the screen and click Save. For example, the Company Name and the Address 1, and Zip Code fields. The Dedupe Search page that you created appears when you set up Match Rules.

To set up a Dedupe Search Screen for the Person entity, follow these steps, select the Person from the Customization homepage, and click the pencil icon in the Customize column beside Person Dedupe Search Screen.

Setting up match rules

Match rules determine the criteria against which the data that the user enters in the Dedupe Search Screen is compared to the records in the system.

When you're setting up match rules, you should consider the following:

- The fields that you set up match rules on are used to deduplicate when a user adds or edits the record.
- Only one match rule can be set up per table column. You must specify one type of match rule for Company Name, one for Address City.
- The fields on the Deduplication search screens are based on logical "AND"s. The more information the user enters into the Deduplication search screen, the less likely that the system will detect a duplicate, since ALL the search criteria entered must be met—company name AND address AND city AND postcode.
To set up the match rules for the Company Dedupe Search Screen:

1. Click <My Profile> | Administration | Data Management | Match Rules.
2. Select Company and click Continue.
3. Click New.
4. Select a value for Match Field and Match Type.
5. Click Save.
6. Repeat these steps to set up a match rule for each field on the Company Dedupe screen, then repeat for the Person Dedupe screen.

<table>
<thead>
<tr>
<th>Match Rule</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exact</td>
<td>For example, a user must enter Design Right Inc. for the system to detect a duplicate with Design Right Inc.</td>
</tr>
<tr>
<td>Starting With</td>
<td>For example, a user must enter Des or Design for the system to detect a duplicate with Design Right Inc.</td>
</tr>
<tr>
<td>Contains</td>
<td>For example, a user could enter Des, Right or In for the system to detect a duplicate with Design Right Inc.</td>
</tr>
<tr>
<td>Does Not Match</td>
<td>For example, a user could enter Design Right Inc., and the system would detect duplicates in every company except Design Right Inc.</td>
</tr>
<tr>
<td>Phonetic</td>
<td>For example, a user could enter Greatecom, and the system would detect a duplicate with Gratecom.</td>
</tr>
</tbody>
</table>

Creating a Company Name Cleanup replace list

You can create a list of words that replace certain words or phrases. For example, the abbreviation "&" could be replaced with the word "and" in all the new companies added. The replaced word is not physically replaced, just replaced during the deduplication process. Deduplication must be enabled for the Company Name Cleanup functionality to work.

1. Click <My Profile> | Administration | Data Management | Company Name Cleanup.
2. Choose Characters or Strings to Replace from List To View.
3. Click New.
4. Type the text string you want to replace in Details and enter the word that replaces it in Replace With.
5. Click Save.
6. To create a replace list, continue adding rules.
7. To remove a rule, click Delete.
Creating a Company Name Cleanup remove list

You can create a list of words, phrases, or punctuation on the company name field to be ignored during the deduplication process. For example, you could ignore the word "Ltd." in all new companies added as this word is not a unique part of the company name. The removed word is not physically changed in memory, just ignored for the deduplication process so that matches can be found. Deduplication must be enabled for the Company Name Cleanup functionality to work.

1. Click <My Profile> | Administration | Data Management | Company Name Cleanup.
2. Select Characters or Strings to Remove from List To View.
3. Click New.
4. Type the text string you want to remove in Details.
5. Click Save. The rule is displayed on the Characters or Strings to Remove page.
6. To create a remove list, continue adding rules.
7. To remove a rule, click Delete.

Data Upload

- About Data Upload
- Before you begin uploading data
- Required security profile rights
- Steps to upload data
- User interface reference

About Data Upload

With the Data Upload feature, you can add multiple lead, company, and person records to the Sage CRM database at once without having to enter the details of each record manually in the Sage CRM user interface.

Note: When you import leads into Sage CRM, they are not automatically added into a workflow. However, if your Lead workflow is designed like the default Lead workflow with transition rules that hang from the entry state, action buttons are displayed on the Lead screen that allow users to progress leads. For more information, see About workflow.

Here's how Data Upload works:
Data Upload is enabled by default after Sage CRM installation. This feature is available to System Administrators and Info Managers who have Info Admin Data Rights in Sage CRM. The account used to perform data upload must have View, Edit, and Insert access rights on the target entity type.

To upload data to Sage CRM, you need to prepare a data upload file (CSV, XLS, or XLSX) containing the records you want to add, and then specify that file in the Sage CRM user interface.

The system prompts you to configure a number of Data Upload settings, including:

- **Deduplication settings.** Add rules to detect if the records you are uploading to Sage CRM already exist in the database. If they do, Sage CRM prompts you to merge your data into the existing records, overwrite the existing records with the new ones, or skip duplicate records without adding any data to Sage CRM. You can add deduplication rules only if advanced deduplication is enabled in Sage CRM. Advanced deduplication is enabled automatically if you have included demo data in your Sage CRM installation. Otherwise, advanced deduplication is disabled and you need to enable it manually in the Sage CRM system behavior settings.

- **Mapping settings.** Associate a column in your data file with a field in the Sage CRM database. During Data Upload, data from each column is inserted into the associated field in the database. A column can have only one associated field. If a column is not associated with a field, data from that column is not added to the Sage CRM database. In most cases, Sage CRM maps file columns to database fields automatically, but you can review these mappings, change them if necessary, and add new mappings before your Data Upload begins.

Once you have configured and applied the deduplication and mapping settings, Sage CRM uses them to add your new records to the Microsoft SQL Server database. Sage CRM generates a report and log files.
that contain information about the data upload results and help you to identify and troubleshoot any issues if they occur.
Before you begin uploading data

We recommend that you create a full backup of the Sage CRM database before uploading new records. A full backup enables you to roll back any changes made by Data Upload, if necessary. If you don't have a full database backup and something goes wrong while you're uploading new records, you might have to delete them from the Sage CRM database manually.

If you don't have sufficient permissions to create full backups of the Sage CRM database, ask your SQL Server database administrator to back up the database for you.

To create a full backup of the Sage CRM database, you can use Microsoft SQL Server Management Studio. In this example, we'll use Management Studio supplied with SQL Server 2014 to back up the Sage CRM database.

1. Open SQL Server Management Studio: at a command prompt, enter ssms.exe
2. Specify parameters to connect to the Microsoft SQL Server computer that hosts the Sage CRM database.
3. In the left pane (Object Explorer), expand the Databases node to locate the Sage CRM database. By default, the name of the database is CRM.
4. Right-click the Sage CRM database, point to Tasks, and then click Back Up.
5. In the dialog box that opens, do the following:
   a. From Backup type, select Full.
   b. Under Backup component, select Database.
   c. From Back up to, select Disk.
   d. Click OK and wait until Management Studio backs up the database.

Now you can add new records to the database using the Data Upload feature. You can always revert to the previous version of the database using the full backup you have created.
Required security profile rights

To upload records, the security profile assigned to your Sage CRM account must have the following minimum rights:

<table>
<thead>
<tr>
<th>Entity</th>
<th>Minimum security profile rights to upload records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Company entity:</td>
</tr>
<tr>
<td></td>
<td>• View</td>
</tr>
<tr>
<td></td>
<td>• Edit</td>
</tr>
<tr>
<td></td>
<td>• Insert</td>
</tr>
<tr>
<td></td>
<td>Person entity (person records associated with company):</td>
</tr>
<tr>
<td></td>
<td>• View</td>
</tr>
<tr>
<td></td>
<td>• Edit</td>
</tr>
<tr>
<td></td>
<td>• Insert</td>
</tr>
<tr>
<td>Lead</td>
<td>• View</td>
</tr>
<tr>
<td></td>
<td>• Edit</td>
</tr>
<tr>
<td></td>
<td>• Insert</td>
</tr>
<tr>
<td>Person</td>
<td>• View</td>
</tr>
<tr>
<td></td>
<td>• Edit</td>
</tr>
<tr>
<td></td>
<td>• Insert</td>
</tr>
</tbody>
</table>
Steps to upload data

- Step 1: Prepare a data upload file
- Step 2: Upload file to Sage CRM
- Step 3: Configure mapping
- Step 4: Configure deduplication
- Step 5: Preview and create records

Step 1: Prepare a data upload file

In this step, you need to prepare a file containing the new records to upload.

To upload data, you can use one of the following formats:

- **Comma-separated values (CSV)** (recommended). Unlike Excel Workbook (XLSX and XLS) files, CSV files don't store any complex formatting, formulas, and filters that might prevent your data from uploading correctly. Make sure to use the delimiter specified in the Sage CRM system behavior settings (by default, this is a comma).

- **Excel Workbook (XLSX)** or **Excel 97-2003 Workbook (XLS)**. Your file shouldn't contain any complex formatting, formulas, filters, and errors in cell values, because they might prevent data from uploading correctly. Data Upload can work with XLSX and XLS files created by Microsoft Excel supplied with Microsoft Office 2010 or later.

The most convenient way to prepare a Sage CRM-compatible data upload file is using Microsoft Excel. For detailed information about the requirements your file must meet, see Data upload file requirements.

1. In Microsoft Excel, create a new blank workbook.
2. In row 1, enter the captions of the Sage CRM fields into which you want to add data, for example:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company</td>
<td>Last Name</td>
<td>First Name</td>
<td>Description</td>
<td>Email</td>
<td>Source</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The fields you specify in your file must exist in the Sage CRM database.

Using field captions as column headings helps Sage CRM to automatically map each file column to the corresponding field in the database. If necessary, you can review and manually change these mappings later before running your data upload.
3. Enter the records to be uploaded. For more information and examples, see Data upload file requirements.

4. Save the workbook as a CSV, XSLX, or XLS file.

Data upload file requirements

Regardless of what type of records you are uploading, your file must meet the requirements listed in the table below.

For requirements related to a particular entity, see the following:

- **Lead**
- **Company**
- **Person**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file name must be less than 60 characters long.</td>
<td>This excludes the file path.</td>
</tr>
<tr>
<td>Each column in the file must have a unique heading and be mapped to an existing field in the Sage CRM database.</td>
<td>Using actual field captions as column headings in your data upload file helps Sage CRM to automatically map each file column to the corresponding field in the database. If necessary, you can review and manually change these mappings later before running your data upload. The fields you populate don’t need to be added to a Sage CRM screen, but they must exist in the Sage CRM database.</td>
</tr>
<tr>
<td>Your file must contain a valid non-empty value for each required field in Sage CRM.</td>
<td>Required fields are those you must fill in to create a new record in Sage CRM. Such fields are marked with a blue asterisk in the Sage CRM user interface, for example: <strong>Company Name:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Last name:</strong></td>
</tr>
<tr>
<td></td>
<td>If you don’t populate each required field with a valid non-empty value, the entity record is not created in the Sage CRM database during data upload.</td>
</tr>
<tr>
<td></td>
<td>For more information about default required fields, see</td>
</tr>
<tr>
<td></td>
<td>- <strong>Lead</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Company</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Person</strong></td>
</tr>
<tr>
<td>Requirement</td>
<td>Comment</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The maximum number of rows (records) in your data upload file shouldn't exceed 5000.</td>
<td>If you want to upload more than 5000 records, consider creating several data upload files.</td>
</tr>
<tr>
<td>Do not upload data from the same file two or more times in a row.</td>
<td>This can lead to creation of duplicate records in Sage CRM. If something went wrong during your data upload, review the data upload report, logs, and errors file before retrying to upload data.</td>
</tr>
<tr>
<td>If you are using a CSV file, make sure to escape special characters in the values.</td>
<td>• Any values that contain a comma must be enclosed in double quotes. &lt;br&gt;• Any values that contain double quotes must be escaped with another double quote.</td>
</tr>
<tr>
<td>If you are using an XLS or XLSX file, make sure it doesn't contain cells formatted as dates.</td>
<td>We recommend that you save your XLS or XLSX file as CSV and then upload the CSV file to Sage CRM.</td>
</tr>
<tr>
<td>All dates in your data upload file must have an identical format.</td>
<td>For example, DD/MM/YYYY, MM/DD/YY, or MM/YYYY. &lt;br&gt;If your file contains dates in different formats, Sage CRM won't be able to correctly process your data.</td>
</tr>
<tr>
<td>Each cell in a data upload file column can contain multiple values.</td>
<td>You can write information stored in a multivalued column cell to multiple fields located in the same Sage CRM database table. &lt;br&gt;For more information, see Mapping multivalued column cells. &lt;br&gt;The data format used in multivalued cells must be consistent in your data upload file. Note that Sage CRM cannot process surnames that have Mc or O’ prefixes or include blank spaces.</td>
</tr>
<tr>
<td>Each record (row) in your data upload file can include multiple addresses or notes.</td>
<td>When adding multiple addresses to the same row, make sure to assign a different type to each of the addresses. For example, <strong>Home</strong> and <strong>Business</strong>.</td>
</tr>
<tr>
<td>If your data upload file contains values for multiselect fields, these values should not contain spaces.</td>
<td>We recommend that you modify the values of multiselect fields in the Sage CRM database so that they don't contain spaces. &lt;br&gt;When specifying values for a multiselect field in your data upload file, use a comma as a separator.</td>
</tr>
</tbody>
</table>

**Lead**

By default, the required fields for creating a lead record are:
### Field caption in the user interface vs. Field code in the database

<table>
<thead>
<tr>
<th>Field caption in the user interface</th>
<th>Field code in the database</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>lead_companyname</td>
</tr>
<tr>
<td>Last Name</td>
<td>lead_personlastname</td>
</tr>
<tr>
<td>First Name</td>
<td>lead_personfirstname</td>
</tr>
<tr>
<td>Description</td>
<td>lead_description</td>
</tr>
<tr>
<td>Assigned to</td>
<td>lead_assigneduserid</td>
</tr>
<tr>
<td>Email</td>
<td>lead_personemail</td>
</tr>
</tbody>
</table>

In row 1 of the data upload file, enter the captions of the required Sage CRM fields and any optional fields you want to populate with values, for example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company</td>
<td>Last Name</td>
<td>First Name</td>
<td>Description</td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you want to assign all lead records to one user, omit the **Assigned to** column in the data upload file: you can select that user later when specifying your data upload settings. For more information, see Settings for leads.

If you want to assign lead records to different Sage CRM users, add the following two columns to the file:
- **Assign to**. Specify the logon ID or email address of the Sage CRM user to whom you want to assign the lead record.
- **Team**. Enter the name of the primary team to which the user belongs, as it appears in the Sage CRM user interface.

Then, enter the lead records to be uploaded. Each row must contain one lead record only, for example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company</td>
<td>Last Name</td>
<td>First Name</td>
<td>Description</td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td>Suir</td>
<td>Keane</td>
<td>Paul</td>
<td>Suir - new lead</td>
<td>[email]</td>
</tr>
<tr>
<td>3</td>
<td>Moy</td>
<td>Downhill</td>
<td>Jim</td>
<td>Moy - new lead</td>
<td>[email]</td>
</tr>
<tr>
<td>4</td>
<td>Lee</td>
<td>Evans</td>
<td>Barbara</td>
<td>Lee - new lead</td>
<td>[email]</td>
</tr>
<tr>
<td>5</td>
<td>Avoca</td>
<td>Ryan</td>
<td>Anna</td>
<td>Avoca - new lead</td>
<td>[email]</td>
</tr>
<tr>
<td>6</td>
<td>Bann</td>
<td>Bradford</td>
<td>Jim</td>
<td>Bann - new lead</td>
<td>[email]</td>
</tr>
</tbody>
</table>

Each lead record (row in the file) must include one company and one person.

**Company**

By default, the required fields for creating a company record are:
### Field caption in the user interface | Field code in the database
---|---
Company Name | comp_name
Address 1 | addr_address1
Last Name | pers_lastname
First Name | pers_firstname

In row 1 of the data upload file, enter the captions of the required and any optional Sage CRM fields you want to populate with values, for example:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Company</td>
<td>Address 1</td>
<td>City</td>
<td>Last Name</td>
<td>First Name</td>
<td>Email</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Then, enter the company and person records to be uploaded, for example:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company</td>
<td>Address 1</td>
<td>City</td>
<td>Last Name</td>
<td>First Name</td>
<td>Email</td>
<td>Mobile</td>
</tr>
<tr>
<td>2</td>
<td>Nore</td>
<td>1 Garden Way Sligo</td>
<td>Hackett</td>
<td>Steve</td>
<td><a href="mailto:steve.hackett@demosagecrm.com">steve.hackett@demosagecrm.com</a></td>
<td>123456789</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Nore</td>
<td>1 Garden Way Sligo</td>
<td>Moore</td>
<td>George</td>
<td><a href="mailto:george.moore@demosagecrm.com">george.moore@demosagecrm.com</a></td>
<td>987654321</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Liffey</td>
<td>2 Fruit Close</td>
<td>Galway</td>
<td>Carr</td>
<td><a href="mailto:iris.carr@demosagecrm.com">iris.carr@demosagecrm.com</a></td>
<td>567891234</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Liffey</td>
<td>2 Fruit Close</td>
<td>Galway</td>
<td>Murdoch</td>
<td><a href="mailto:marina.murdoch@demosagecrm.com">marina.murdoch@demosagecrm.com</a></td>
<td>432198765</td>
<td></td>
</tr>
</tbody>
</table>

Each row must contain one person record only. If you want to add another person associated with the same company, use a different row and enter the same company details for that person record. The first person specified for a new company in the file automatically becomes the main company contact. You can change the main company contact later in the Sage CRM user interface.

Each company you upload must have an address. If you don't map a column in the data upload file to the company address field in Sage CRM, the address of the first person specified for the company in the file becomes the company's address. If a person record in the data upload file has a business address and a home address, only the person’s business address becomes the company's address.

If you specify the same address for multiple person records in your data upload file, a single record is created for the address in the Sage CRM database. Then, this address record is linked to the person records. Any updates made to that address record in Sage CRM apply to all person records linked to that address.

### Person

By default, the required fields for creating a person record are:
Field caption in the user interface | Field code in the database
---|---
Last Name | pers_lastname
First Name | pers_firstname
Address 1 | addr_address1

In row 1 of the data upload file, enter the captions of the required and any optional Sage CRM fields you want to populate with values, for example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Last Name</td>
<td>First Name</td>
<td>Email</td>
<td>Mobile</td>
<td>Address 1</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Then, enter the person records to be uploaded. Each row must contain one person record only, for example:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Last Name</td>
<td>First Name</td>
<td>Email</td>
<td>Mobile</td>
<td>Address 1</td>
</tr>
<tr>
<td>2</td>
<td>Rose</td>
<td>Amy</td>
<td><a href="mailto:amy.rose@demosagecrm.com">amy.rose@demosagecrm.com</a></td>
<td>123456789</td>
<td>1 Flower Lane</td>
</tr>
<tr>
<td>3</td>
<td>Black</td>
<td>Jim</td>
<td><a href="mailto:jim.black@demosagecrm.com">jim.black@demosagecrm.com</a></td>
<td>987654321</td>
<td>2 Brick Road</td>
</tr>
<tr>
<td>4</td>
<td>Green</td>
<td>Michael</td>
<td><a href="mailto:michael.green@demosagecrm.com">michael.green@demosagecrm.com</a></td>
<td>5678912345</td>
<td>3 Tree Place</td>
</tr>
</tbody>
</table>

All data for each person record must be entered in the same row.

**Step 2: Upload file to Sage CRM**

Before completing the steps below, make sure that your Sage CRM account has the Required security profile rights.

1. Log on to Sage CRM as a System Administrator or Info Manager with Info Admin Data Rights.
2. Go to `<My Profile> | Administration | Data Management | Data Upload`.
3. Under Data Upload, click one of the following, and then click Continue. If you don’t have the Required security profile rights, some or all of these options may not be available.
   - **Company**. Uploads company records with linked person records.
   - **Individuals**. Uploads person records not linked to any companies.
   - **Lead**. Uploads lead records.
5. Configure the following upload options. For more information about other options you can configure on this page, see Data upload file settings.
   - **Data File**. Specify the data upload file you have prepared.
   - **Description**. Enter an informative description for your data upload. Sage CRM uses this description to identify your data upload in the user interface.
6. Click Save. If prompted, confirm that you want to copy the file to the Sage CRM server.
Step 3: Configure mapping

Once you have uploaded your data upload file to Sage CRM, a page similar to the following opens:

<table>
<thead>
<tr>
<th>Data File Column</th>
<th>Dedupe Rule</th>
<th>Sample Data</th>
<th>Field Name</th>
<th>Actual Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Sur</td>
<td></td>
<td>Company</td>
<td>Lead_CompanyName (WideString 60)</td>
</tr>
<tr>
<td>Last Name</td>
<td>Kesne</td>
<td></td>
<td>Last Name</td>
<td>Lead_PersonLastName (WideString 30)</td>
</tr>
<tr>
<td>First Name</td>
<td>Paul</td>
<td></td>
<td>First Name</td>
<td>Lead_PersonFirstName (WideString 30)</td>
</tr>
<tr>
<td>Description</td>
<td>Sur - new lead</td>
<td></td>
<td>Description</td>
<td>Lead_Description (WideString 40)</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:paul.keane@demosagecrm.com">paul.keane@demosagecrm.com</a></td>
<td>E-mail</td>
<td>Email</td>
<td>Lead_PersonEmail (WideString 255)</td>
</tr>
</tbody>
</table>

The upper table on the page shows the data upload file columns that are currently mapped to Sage CRM fields. Use this table to view the mappings and change them if necessary. This table has the following columns:

- **Data File Column**: Shows column names in the data upload file. You can click a column name to change the column's mapping.
- **Dedupe Rule**: Shows the deduplication rule configured for each column. Currently this column is empty – you'll configure deduplication rules later in Step 4: Configure deduplication.
- **Sample Data**: Shows the first value contained in the data upload file column.
- **Field Name**: Shows the UI caption of the Sage CRM field to which the data upload file column is mapped.
- **Actual Field**: Shows the code of the Sage CRM field to which the data upload file column is mapped.

The lower table on the page lists data upload file columns not mapped to any Sage CRM fields yet. Use this table to manually map the columns. Values in the columns that remain unmapped are not added to the Sage CRM database during data upload.

**To map not mapped columns**

1. Under **Fields not mapped yet (will be ignored)**, click the column name.
2. Configure mapping settings. For more information, see Mapping and deduplication settings.
3. When you're finished, click **Save**.

**To change current mappings**

1. In **Data File Column** of the table (columns mapped to database fields), click the column name.
2. Change the mapping settings as necessary. For more information about the options you can use, see Mapping and deduplication settings.
3. When you're finished, click **Save**.
For more information on how to map columns that contain multivalued cells, see Mapping multivalued column cells.

Mapping multivalued column cells

If each cell in a data upload file column contains multiple values, you can map that column to multiple Sage CRM database fields. As a result, column values are inserted into the corresponding Sage CRM fields during data upload.

The fields to which you write data from multivalued cells in your data upload file must be located in the same Sage CRM database table. The format of values in a file column must be consistent. Otherwise, Sage CRM won't be able to correctly process data in the column.

<table>
<thead>
<tr>
<th>Data File Column</th>
<th>Dedupe Rule</th>
<th>Sample Data</th>
<th>Belongs to</th>
<th>Data Table</th>
<th>Field Name</th>
<th>Actual Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last and First Name</td>
<td>Hackert, Steve</td>
<td>Person</td>
<td>Last Name</td>
<td>Pers_LastName (WideString 40)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td>1 Garden Way</td>
<td>Person</td>
<td>Address</td>
<td>Addr_Address1 (WideString 40)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Sligo</td>
<td>Person</td>
<td>City</td>
<td>Addr_City (WideString 30)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For example, if the Last and First Name column contains first name and last name as shown above, you can map this column to the appropriate Sage CRM fields as follows:

1. Click the column name (Last and First Name).
2. On the page that opens, from Field Name, select --Multiple--:
   - From Select Field, select Person : Last Name.
   - Click Add.
   - In Format Mask, enter a comma after the inserted value.
   
   You need to insert a comma because it is used as a value separator in the data upload file. Always make sure to separate values in the Format Mask box with the same separator that is used in your data upload file. Otherwise, Sage CRM won't be able to correctly process your data.
d. From Select Field, select Person: First Name.

e. Click Add.

As a result your format mask should look as follows:
#pers_lastname#, #pers_firstname#

5. Click Save.

Mapping territories

You can assign territories to the records being uploaded. To do so, in your data upload file, create a column (Territory) containing the Sage CRM territories you want to assign, for example:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Address</td>
<td>City</td>
<td>Last Name</td>
<td>First Name</td>
<td>Email</td>
<td>Mobile</td>
<td>Territory</td>
</tr>
<tr>
<td>2</td>
<td>1 Garden Way</td>
<td>Sligo</td>
<td>Hackett</td>
<td>Steve</td>
<td><a href="mailto:steve.hackett@emosagecrm.com">steve.hackett@emosagecrm.com</a></td>
<td>123456789</td>
<td>U.K.</td>
</tr>
<tr>
<td>3</td>
<td>1 Garden Way</td>
<td>Sligo</td>
<td>Moore</td>
<td>George</td>
<td><a href="mailto:george.moore@emosagecrm.com">george.moore@emosagecrm.com</a></td>
<td>98754321</td>
<td>Ireland</td>
</tr>
<tr>
<td>4</td>
<td>2 Fruit Close</td>
<td>Galway</td>
<td>Carr</td>
<td>Iris</td>
<td><a href="mailto:iris.carr@emosagecrm.com">iris.carr@emosagecrm.com</a></td>
<td>123459875</td>
<td>US East</td>
</tr>
<tr>
<td>5</td>
<td>2 Fruit Close</td>
<td>Galway</td>
<td>Murdoch</td>
<td>Marina</td>
<td><a href="mailto:marina.murdoch@emosagecrm.com">marina.murdoch@emosagecrm.com</a></td>
<td>98751234</td>
<td>Worldwide</td>
</tr>
<tr>
<td>6</td>
<td>2 Fruit Close</td>
<td>Galway</td>
<td>Doe</td>
<td>John</td>
<td><a href="mailto:marina.murdoch@emosagecrm.com">marina.murdoch@emosagecrm.com</a></td>
<td>98751234</td>
<td>Europe</td>
</tr>
</tbody>
</table>

Make sure the territory names in your file exactly match the territory names in Sage CRM.

Then, map the Territory column to the appropriate Sage CRM field, for example, Lead: Territory, Company: Territory, or Person: Territory.

If you don't assign any territory during Data Upload, the territory of your Sage CRM user account is automatically assigned to the records.

Step 4: Configure deduplication

In this step, you need to configure deduplication rules to avoid the creation of duplicate records in Sage CRM during data upload. You can configure deduplication rules only if advanced deduplication is enabled in the Sage CRM system behavior settings. When advanced deduplication is disabled, the Data Upload feature performs a simple deduplication.

We recommend that you upload data with advanced deduplication enabled. In this case, you have better control over the data that is written to the Sage CRM database. For more information, see Enabling deduplication.

For each data upload file column, you can configure only one deduplication rule. You can configure deduplication rules for columns containing multivalued cells in the same way as for columns containing single-valued cells.

With advanced deduplication enabled, you must configure the following minimum deduplication rules:
To add a deduplication rule

1. In the **Data File Column**, click the name of the column for which you want to add a deduplication rule.
2. From **Dedupe Rule**, select the value you want to use.
   For more information, see *Mapping and deduplication settings*.
3. Click **Save**.

Repeat these steps for each column for which you want to add deduplication rules.

We recommend that you configure deduplication rules as follows:

**Lead**
Set the **Exact Match** deduplication rule on company name, person’s last name, and person’s first name.

**Company**
Set the **Exact Match** deduplication rule on company name, company address, person’s last name, and person’s first name.

**Person**
Set the **Exact Match** deduplication rule on first name and last name.

**Step 5: Preview and create records**

Once you have added deduplication rules in **Step 4: Configure deduplication**, you can preview the records to be created in Sage CRM:

1. Click **Preview Data Upload** to display a list of records to be created in Sage CRM.
2. If necessary, configure how you want to process duplicates during data upload.
   For more information, see *Preview and duplicate settings*.
3. Click **Do Upload** to start your data upload and create the new records in the Sage CRM database.

When your data upload is finished, Sage CRM displays the **Data upload results**.

If your Data Upload has erroneously created redundant records with empty fields, you can use a SQL query to remove these records from the Sage CRM database. For example SQL queries, see *Removing redundant records*.
Removing Redundant Records

You can use a SQL query to delete redundant records that were erroneously created in the Sage CRM database. For example, redundant or incomplete records can be created if you uploaded data with advanced deduplication disabled. This section provides example SQL queries you can use to delete records whose required fields are blank.

- Removing persons with empty fields
- Removing addresses with empty fields

Removing persons with empty fields

The following query searches for and removes person records whose Last Name and First Name fields are blank.

```sql
PEOPLE!

update company set comp_primarypersonid=null where comp_primarypersonid in (select pers_personid from person where pers_lastname is null and pers_firstname is null)

delete from phone where phon_phoneid in (select phon_phoneid from vPersonPhone where plink_recordid in (select pers_personid from Person where pers_lastname is null and pers_firstname is null))

delete from email where emai_emailid in (select emai_emailid from vPersonEmail where elink_recordid in (select pers_personid from Person where pers_lastname is null and pers_firstname is null))

delete from phonelink where plink_phoneid in (select phon_phoneid from vPersonPhone where plink_recordid in (select pers_personid from Person where pers_lastname is null and pers_firstname is null))

delete from emaillink where elink_emailid in (select emai_emailid from vPersonEmail where elink_recordid in (select pers_personid from Person where pers_lastname is null and pers_firstname is null))

delete from address where addr_addressid in (select adli_addressid from address_link where adli_personid in (select pers_personid from person where pers_lastname is null and pers_firstname is null))
```
delete from address_link where adli_personid
  in (select pers_personid from person where pers_lastname is null and pers_firstname is null)

delete from person_link where peli_Personid
  in (select pers_personid from person where pers_lastname is null and pers_firstname is null)

delete from person where pers_lastname is null and pers_firstname is null

Removing addresses with empty fields

The following query searches for and removes address records whose Address 1 field is blank.

ADDRESSES!

update company set comp_primaryaddressid = null
  where comp_primaryaddressid
  in (select addr_addressid from address where addr_address1 is null)

update person set pers_primaryaddressid = null
  where pers_primaryaddressid
  in (select addr_addressid from address where addr_address1 is null)

delete from address_link where adli_addressid
  in (select addr_addressid from address where addr_address1 is null)

delete from address where addr_address1 is null
User interface reference

This section provides descriptions of the Sage CRM fields and UI elements you can use when uploading data.

- Data upload file settings
- Mapping and deduplication settings
- Preview and duplicate settings
- Data upload results
Data upload file settings

Available data upload file settings depend on the type of records you are uploading.

- Settings for companies and people
- Settings for leads

Settings for companies and people

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data File</td>
<td>Browse to select the data upload file you want to use. When you open a previously saved data upload, this option shows the selected data upload file name and it cannot be changed. When you open a previously saved data upload that was run and generated errors or duplicate records, the following additional options are available:</td>
</tr>
<tr>
<td></td>
<td><strong>Use Data File.</strong> Reruns data upload using the original data upload file. <strong>Warning:</strong> Use this option with extreme caution, as it may create duplicate records or overwrite data on your system.</td>
</tr>
<tr>
<td></td>
<td><strong>Use Error File.</strong> Reruns data upload only for those records that generated errors during the last data upload attempt.</td>
</tr>
<tr>
<td></td>
<td><strong>Use Duplicate File.</strong> Reruns data upload only for duplicate records that were detected during the last data upload attempt.</td>
</tr>
<tr>
<td></td>
<td><strong>View Error File.</strong> Opens the data upload error file generated during the last data upload attempt.</td>
</tr>
<tr>
<td>Select From Existing Mappings</td>
<td>Allows you to reuse column to field mappings configured for previous data uploads. You can use this option if your new data upload file has the same columns as one of the files you uploaded previously. This option is available only if you have uploaded companies or people at least once.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter an informative description for your data upload. Sage CRM uses this description to identify your data upload in the user interface.</td>
</tr>
<tr>
<td>File Date Format</td>
<td>Select the date format used in your data upload file. <strong>Note:</strong> All dates in your data upload file must have an identical format.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Merge Rule</strong></td>
<td>Select how you want to treat duplicate records during your data upload. You can either merge duplicate records with the matching existing records or completely overwrite the matching existing records with the records from your data upload file.</td>
</tr>
<tr>
<td><strong>Max Contacts Per Row</strong></td>
<td>Specify the maximum number of person records each row of the data upload file contains. <strong>Note:</strong> Always keep the default value in this option.</td>
</tr>
<tr>
<td><strong>Max Addresses Per Row</strong></td>
<td>Specify the maximum number of addresses on each row of the data upload file.</td>
</tr>
<tr>
<td><strong>Preview Rows</strong></td>
<td>Specify the number of data upload file rows you want to preview before you start uploading data to Sage CRM.</td>
</tr>
<tr>
<td><strong>Max Notes Per Row</strong></td>
<td>Specify the maximum number of notes on each row of the data upload file.</td>
</tr>
<tr>
<td><strong>Make a Group</strong></td>
<td>Select this check box to create a group for your data upload in Sage CRM. The group includes all records that were created in Sage CRM during the data upload. If you select this check box, you can use the <strong>Groups</strong> tab in Sage CRM to view the records created by your data upload.</td>
</tr>
<tr>
<td><strong>Overwrite Person Default Address</strong></td>
<td>Replaces the person’s default address with the one added to Sage CRM during data upload. When this check box is selected, the new address is also added as a company address. If there is more than one address for a person in the data upload file, the first address becomes the default one.</td>
</tr>
<tr>
<td><strong>Map Selection Fields to Codes</strong></td>
<td>When this option is selected, the system tries to match selection field translations from your CSV file to caption codes in Sage CRM. For example, a person title of Chief Executive Officer gets mapped to the caption code CEO, and stored in the database. If a selection does not yet exist in Sage CRM, it gets added to the database. In this case, the caption code will be the same as the selection. When this option is not selected, selection list choices entered in the CSV file as translations rather than caption codes are not added to the database. The translation, for example, Chief Executive Officer, is displayed on the person summary page for viewing, but not added to the database. This means that when you select <strong>Change</strong>, you must set the drop-down field to a selection that already exists in the Sage CRM database.</td>
</tr>
</tbody>
</table>
## Settings for leads

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data File</td>
<td>Browse to select the data upload file you want to use. When you open a previously saved data upload, this option shows the selected data upload file name and it cannot be changed. When you open a previously saved data upload that was run and generated errors or duplicate records, the following additional options are available:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Use Data File.</strong> Reruns data upload using the original data upload file. Use this option with extreme caution, as it may create duplicate records or overwrite data on your system.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Use Error File.</strong> Reruns data upload only for those records that generated errors during the last data upload attempt.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Use Duplicate File.</strong> Reruns data upload only for duplicate records that were detected during the last data upload attempt.</td>
</tr>
<tr>
<td></td>
<td>• <strong>View Error File.</strong> Opens the data upload error file generated during the last data upload attempt.</td>
</tr>
<tr>
<td>Select From Existing Mappings</td>
<td>Allows you to reuse column to field mappings configured for previous data uploads. This option is available only if you have uploaded lead records at least once.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter an informative description for your data upload. Sage CRM uses this description to identify your data upload in the user interface.</td>
</tr>
<tr>
<td>File Date Format</td>
<td>Select the date format used in your data upload file. <strong>Note:</strong> All dates in your data upload file must have an identical format.</td>
</tr>
<tr>
<td>Merge Rule</td>
<td>Select how you want to treat duplicate records during your data upload. You can either merge duplicate records with the matching existing records or completely overwrite the matching existing records with the records from your data upload file.</td>
</tr>
<tr>
<td>Preview Rows</td>
<td>Specify the number of data upload file rows you want to preview before you start uploading data to Sage CRM.</td>
</tr>
<tr>
<td>Make a Group</td>
<td>Select this check box to create a group for your data upload in Sage CRM. The group includes all records that were created in Sage CRM during the data upload. If you select this check box, you can use the <strong>Groups</strong> tab in Sage CRM to view the records created by your data upload.</td>
</tr>
<tr>
<td>Lead Description</td>
<td>Enter an informative description for the lead records you are uploading.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Assign to Team</td>
<td>Select the team to which you want to assign the lead records being uploaded. Do not use this option if you assign lead records using columns in your data upload file. For more information about how to assign lead records to Sage CRM users, see Lead.</td>
</tr>
<tr>
<td>Territory</td>
<td>Select the territory to which you want to assign the lead records.</td>
</tr>
<tr>
<td>Assign to Users</td>
<td>Specify the Sage CRM user to whom you want to assign the lead records. If you want to assign lead records to different users, create and populate the appropriate columns in your data upload file (see Lead for details). Then, select any user in the Assign to Users option. As a result, the lead records are assigned to the users specified in the data upload file.</td>
</tr>
<tr>
<td>Wave Item</td>
<td>Select the marketing campaign wave to which you want to assign the lead records. If you are not planning to use the lead records in a marketing campaign, leave this option blank.</td>
</tr>
</tbody>
</table>
# Mapping and deduplication settings

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Belongs to | Select the Sage CRM entity with which you want to associate the data upload file column. To associate a column with both Company and Person, select **Person** in this option. As a result, the column value is automatically assigned to the company record with which the person record is associated. For Phone, types Business and Fax are shared. For Email, type Business is shared. **Note:** This option is available only when you are uploading company or person records. When **Belongs to** is set to **Person** and the number of contacts in the data upload file settings is set to more than one, the following additional option is available: *
|            | • **Order.** Select the person record to which this field belongs.                                                                                                                                                                                                                                                                 |
| Data Table | Select the table in the Sage CRM database to which you want to write data from the upload file column. You can select one of the following tables:                                                                                                                                                                                     |
|            | • Addresses                                                                                                                                                                                                                                                                                                                                 |
|            | • Email                                                                                                                                                                                                                                                                                                                                   |
|            | • Phone                                                                                                                                                                                                                                                                                                                                  |
|            | • Notes                                                                                                                                                                                                                                                                                                                                 |
|            | If in **Belongs to** you have selected **Company** or **Person**, leave **Data Table** blank. **Note:** Fax numbers belong to the Phone table, with the type set to Fax. When **Data Table** is set to **Address** or **Notes**, and the number or addresses or notes in the data upload file settings is set to more than one, the following additional option is available: *
|            | • **Order.** Select the address or note record to which this field belongs.                                                                                                                                                                                                                                                             |
| Field Name | Select the Sage CRM field you want to populate with values from the upload file column. If each column cell includes multiple values, you can insert them into several Sage CRM fields. For more information, see **Mapping multivalued column cells.**                                                                                                               |
| Match User Fields | Specify what value on the user table you want to match when you are mapping a column in your data file to a User Select field. For example, if the file you are uploading contains the full user name, you can specify "Firstname Lastname" to insert the correct User ID. **Note:** This option is available only for User Select columns.                                                              |
| <FieldName> <Type> | Allows you to assign a category to the data in the upload file column. **Note:** This option is available only when: **Belongs to** is set to **Person** or **Company** and **Data Table** is set to **Address, Phone,** or **Email.**                                                                                           |
### Dedupe Rule
Select a condition to detect duplicate records during your data upload.
You can select one of the following:

- **Exact Match.** A record is detected as a duplicate if the column cell value exactly matches the value in the mapped Sage CRM field.

- **Phonetic.** A record is detected as a duplicate if the column cell value phonetically matches the value in the mapped Sage CRM field.
  
  For example, an uploaded company named *Greatecom* is detected as a duplicate of an existing company named *Gatecom*.

- **First Letter Match** A record is detected as a duplicate if the first character of the column cell value matches the first character of the value in the mapped Sage CRM field.
  
  For example, an uploaded company named *Design Right Inc.* is detected as a duplicate of an existing company named *Davis & Son Publishing Ltd.*

- **Begins With** A record is detected as a duplicate if the column cell value begins with the same characters as the value in the mapped Sage CRM field.
  
  For example, an uploaded company named *Design Right Inc.* is detected as a duplicate of an existing company named *Des Barnes Sign Makers*.

- **Contains.** A record is detected as a duplicate if the column cell value contains the string in the mapped Sage CRM field.
  
  For example, an uploaded company named *Design Right* is detected as a duplicate of an existing company named *Design Right Management*.

- **Not Equal To** A record is detected as a duplicate if the column cell value does not match the value in the mapped Sage CRM field.
  
  You can use this condition when you don't want the imported value to overwrite the existing value in the mapped Sage CRM field. For example, use this condition if you want to have a single person record associated with a company record.

### Save
Saves the current settings.

### Clear Mappings
Clears the current mapping specified for the data file column.
## Preview and duplicate settings

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>Specify the source of the records being uploaded. You can select one of the following:</td>
</tr>
<tr>
<td>Note: You can use this option to specify the same source to all records being uploaded. If you want to specify different sources for different records, create a new column in your data upload file, enter a source for each record, and map the file column to the appropriate Sage CRM field.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Phone</td>
</tr>
<tr>
<td></td>
<td>• Email</td>
</tr>
<tr>
<td></td>
<td>• Fax</td>
</tr>
<tr>
<td></td>
<td>• Web</td>
</tr>
<tr>
<td></td>
<td>• Letter</td>
</tr>
<tr>
<td></td>
<td>• Employee</td>
</tr>
<tr>
<td></td>
<td>• Customer Referral</td>
</tr>
<tr>
<td></td>
<td>• Advertisement</td>
</tr>
<tr>
<td></td>
<td>• Trade Press</td>
</tr>
<tr>
<td></td>
<td>• Tradeshow</td>
</tr>
<tr>
<td></td>
<td>• Import</td>
</tr>
</tbody>
</table>

To create a new source and assign it to the records, select **New**, and then complete the following additional options:

- **Source Code.** Enter the code with which you want to identify the new source.
- **Source Description.** Enter the source name (caption) to be displayed in the Sage CRM user interface.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Append To Log File</td>
<td>Adds new data to the existing data upload log file without overwriting its contents.</td>
</tr>
<tr>
<td>Overwrite Log File</td>
<td>Completely overwrites the contents of the log file with new data.</td>
</tr>
</tbody>
</table>
### Option | Description
--- | ---
Process Duplicates Interactively | Select this option to view and process duplicate records interactively as Sage CRM finds them during data upload.  
**Note:** To use this option, you must have advanced deduplication enabled in Sage CRM.  
With this option selected, when Sage CRM finds a duplicate record in your data upload file, your data upload pauses and Sage CRM displays a page that lists one or more existing records that match the duplicate. On that page, you can do one of the following:  
- Merge the duplicate record in your file with an existing record in the Sage CRM database or overwrite the existing record completely. To do so, click the name of the existing record Sage CRM displays. The action that Sage CRM performs (merge or overwrite) depends on the Data upload file settings you have configured. When you merge a duplicate company record with an existing company, Sage CRM also detects any person matches according to the deduplication rules you have configured for person records.  
- Add the duplicate record as a new record to the Sage CRM database without overwriting or merging it with any of the existing records. To do so, click the Add Record Anyway button. **Warning:** Do not perform this action unless absolutely necessary, as it can lead to the creation of duplicate records in the Sage CRM database.  
- Skip the duplicate record without adding any data into the Sage CRM database. To do so, click the Skip Record button.  
Once you have selected one of these actions, your data upload resumes.

Process Duplicates in Batch | Select this option to automatically copy duplicate records to a separate file and process them later. This option allows you to complete data uploads faster.  
**Note:** To use this option, you must have advanced deduplication enabled in Sage CRM.  
With this option selected, when Sage CRM finds a duplicate record in your data upload file, it does not pause your data upload. Rather, Sage CRM copies the duplicate record to a separate file without writing the duplicate record to the Sage CRM database. The duplicate file has the same format as your original data upload file (that is, XLS, XLSX, or CSV).  
You can use the created duplicate file to interactively process the duplicates later by selecting the Process Duplicates Interactively option.  
When you select Process Duplicates in Batch, you can use the following additional option:  
- **Batch Size.** Recommended for slow connections. Enter the number of lines in the data upload file you want Sage CRM to process at a time. For large data upload files, the recommended value is 70.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview Data</td>
<td>Shows how the data will look like in Sage CRM. Use this preview to verify that the mappings you have configured are correct and the data will be written to the appropriate Sage CRM fields. The first header row in the table shows the names of Sage CRM database tables to which data will be written. The second header row shows the names of Sage CRM fields to which data will be written.</td>
</tr>
<tr>
<td>Do Upload</td>
<td>Starts your data upload.</td>
</tr>
</tbody>
</table>
Data upload results

This page provides information about the number of records processed, ignored, and added, and duplicates found, if any.

You can use the following elements:

- **View Log File.** Opens the Data Upload log file. Use this file to view and troubleshoot any errors that occurred during your data upload.

- **View Error File.** Opens the automatically generated file containing records that were not uploaded to Sage CRM because of errors. This button is available only if any errors occurred during your data upload. This file has the same format as your original data upload file (that is XLS, XLSX, or CSV). You can fix the errors shown in the log file and use the error file to upload the records again. To do so, select the **Use Error File** radio button. This ensures that information is written to the same group you used for the original data upload.

- **View Duplicate File.** Opens the file containing the duplicate records that were not uploaded to Sage CRM. This button is available only if you have selected to process duplicates in batch in Preview and duplicate settings and Sage CRM found one or more duplicates during data upload. This file has the same format as your original data upload file (that is, XLS, XLSX, or CSV). You can use the created duplicates file to interactively process the duplicates later.

- **Group Created.** Indicates that a group was created in Sage CRM for your data upload. To view the created group, click the hyperlink next to this element (on the example screenshot above, this is **Import from Companies.csv**).

Before retrying your data upload, review the log, error, and duplicate files generated by Sage CRM. On a Sage CRM server, you can find these files in the following default location:

- **On a 32-bit system:** %ProgramFiles%\Sage\CRM\CRM\DataUpload
- **On a 64-bit system:** %ProgramFiles(x86)%\Sage\CRM\CRM\DataUpload

Products

- Setting up a simple Product structure
- Setting up a complex pricing structure
- Editing a Product
- Deleting a Product
- Working with Opportunity Items
Setting up a simple Product structure

If you use the default Product configuration settings and your system does not contain demo data, you can set up a simple Product structure. If your system contains demo data, you must deactivate all existing UOMs and Price Lists (except the Default Price List) before setting up a simple Product structure.

With the default configuration settings, you can set up Products and Product Families, and configure Products, in the following order:

1. Setting up Products
2. Setting up Product Families
3. Configuring Products
4. Product configuration fields

Setting up Products

1. Click <My Profile> | Administration | Data Management | Products.
2. Click the Products tab and click New.
3. Type the name of the product in Product Name.
4. Type the code for the product in Product Code.
5. Click Save and then click Change.
6. Add a price for the product. You can add prices for all currencies specified on the Product Configuration tab. Users can create Quotes and Orders and add Line Items to them based on the prices and currencies included in the pricing matrix. If prices haven't been specified for Products in a particular currency, users cannot add the product (in that currency) to a Line Item.
7. Click Save and then click Continue.
8. You can continue to add several products in the same way. The list of new Products you set up is displayed.

When a user adds a Line Item with this pricing system, they select the product they want using the Product search select field, the List Price and Quoted Price fields are completed automatically.

Setting up Product Families

Product Families are used to categorize different types of products. They do not affect pricing in any way. However, they make it easier for users to find the product they want when they are creating line items, as they can first select a Product Family and then the Product they want within that family. For example, if you sell different types of software systems, you may want to categorize them into CRM Systems, Accounting Systems, and ERP Systems.

1. Click <My Profile> | Administration | Data Management | Products.
2. Click the Product Families tab.
3. Click **New**.
4. Type the name of the Product Family in **Name** and add a description in **Description**.
5. Click **Save** and then **Continue**.
6. To create more product families, click **New**. The Product Families are displayed in a list.

**Configuring Products**

Product configuration settings determine how Products are set up and how end users work with them.

1. Click **<My Profile> | Administration | Data Management | Products**.
2. Click the **Product Configuration** tab.
3. Click **Change**.
4. Make changes to the **Product configuration fields**.
5. To allow users to create quotes and orders in multiple currencies, specify the currencies in **Sales Currencies Supported**.
6. Click **Save**.

**Upgrade Products** on the Product Configuration page transfers existing opportunity items to the Products tab. This button is available only if you’ve upgraded from a previous version of Sage CRM. For more information, see **Working with Opportunity Items**.

**Product configuration fields**

The table below explains the fields on the Product Configuration screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Pricing Lists</td>
<td>Allows you to create different pricing lists so that products can be sold at different prices. For example, you may want to set up a Wholesale pricing list and a Retail pricing list. If set to No, there is one price for each product. Once you have created Price Lists and applied them to Products, you cannot disable this option until you deactivate the Price Lists. Note if you set this option to No, the Price Lists tab will not be visible after you click <strong>Save</strong>.</td>
</tr>
<tr>
<td>Use Units Of Measure</td>
<td>When set to Yes, products can be sold in single units or in different multiples, for examples packs of 6 and packs of 12. Pricing can be then applied to the Unit of Measure (UOM). If set to No, prices are applied to single products only. Note if you set this option to No, the Units of Measure tab will not be visible after you click <strong>Save</strong>.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Automate Opportunity Creation</td>
<td>When this option is switched on, clicking New menu button and selecting Quote or Order automatically creates an Opportunity in which the new Quote or Order resides. If it is switched off, however, users cannot create new Quotes and Orders with the New menu button, they can only create them from within an existing Opportunity.</td>
</tr>
<tr>
<td>Order Level Discount</td>
<td>When set to Yes, adds an order level discount section to the Quote and Order screen. This enables users to apply a discount to an entire order, not just to individual line items.</td>
</tr>
<tr>
<td>Sales Currencies Supported</td>
<td>Select the system currencies that products can be priced in. An Opportunity and all associated Quotes and Orders will be in the currency that was selected for the first Quote or Order created. This field is available only on accounts that support multiple currencies. To enable this field, click **Data Management</td>
</tr>
<tr>
<td>Quote Format</td>
<td>The format of the Quote’s reference ID. This can be set up by using the following options, along with any other text and numbers you need:</td>
</tr>
</tbody>
</table>
|                                  | • #C – current user primary channel (Team) id  
• #H – current user primary channel name - e.g. 'Operations'  
• #L – current user logon - e.g. 'mayes'  
• #U – current user id  
• #O – opportunity id of the parent opportunity  
• #I – Orde_OrderQuoteID / Quot_OrderQuoteID  
• #N – number of quote / order within opportunity  
• #D – day part of current datetime (two digit format)  
• #M – month part of current datetime (two digit format)  
• #Y – year part of current datetime (two digit format) |
| Order Format                      | The format of the Order’s reference ID. This can be set up by using the same options as used for the Quote Format, along with any other text and numbers you need                                                                 |
|                                  | For example: ORD20#Y-0000#I would give you ORD2014-0000514, for the 514th order in the system, added in 2014.                                                                                                    |
| Default Quote Expiration Date After | Select the number of days after the day it was created that you want quotes to expire in.                                                                                                               |

### Setting up a complex pricing structure

You can create a complex pricing structure by setting up Price Lists, Units of Measure (UOM), and Product Families. You should set it up by completing the tasks in the following order:
1. Configuring Products
2. Setting up Price Lists
3. Setting up Units of Measure Families
4. Setting up Units of Measure
5. Setting up Product Families
6. Setting up Products in a matrix

Setting up Price Lists

Price Lists allow you to sell the same product at different prices. For example, you might want to sell your product to wholesalers at one price and at a higher price to end users. This example illustrates how to set up two Price Lists, Wholesale and Retail.

1. Click <My Profile> | Administration | Data Management | Products.
2. Click the Price Lists tab and click New.
3. Type the name of the Price List in Name. For example, Wholesale.
4. Type a description of the list in Description.
5. Click Save and then Continue.
6. Create a second Price List called Retail in the same way. Both Price Lists are displayed on the Price Lists tab.

Setting up Units of Measure Families

If you want to sell products in certain quantities you need to set up UOMs, however the UOMs must first be bundled into UOM Families. Let's say you want to sell User Licenses in quantities of 10, 20, and 50 only. You need to create a unit of measure family called User Licenses, and then create UOMs of 10, 20, and 50.

1. Click <My Profile> | Administration | Data Management | Products.
2. Click the Units Of Measure tab and click New.
3. Type the name of the UOM Family in Name. For example, User Licenses.
4. Enter a description in Description.
5. When you click Save, the UOM Family you created is displayed on the Unit Of Measure screen.
6. To create more UOM Families, click New.

Setting up Units of Measure

To create a UOM as part of a UOM Family:

1. Click <My Profile> | Administration | Data Management | Products.
2. Click the UOM Family.
3. Click New UOM.
4. Type a name for the UOM in Name. For example, 5 User Pack.
5. Type a description in **Description**.
6. Type a quantity of units that are contained in this UOM in **Units**. In this example, the quantity is 5.
7. Click **Save** and add three more UOMs in the same way—10 User Pack, 20 User Pack, and 50 User Pack. The UOMs are displayed on the Unit Of Measure screen.

### Setting up Products in a matrix

Once you've set up Product Families, Lists and UOMs, you can create Products and pricing within a matrix that reflects these items.

1. Click **<My Profile> | Administration | Data Management | Products.**
2. Click the **Products** tab and click **New**.
3. Type the product name in **Product Name**. For example, CRM Standard.
4. Type the product code in **Product Code**. For example, 00010.
5. Assign a product family to the Product Family field using the Search Select Advanced buttons.
6. Choose a Unit of Measure Category from **Unit Of Measure Category**.
7. Click **Save**. The Product page is displayed with panels for existing Price Lists.
   In this example, there are two Price Lists, Wholesale and Retail which lists existing UOMs. If you configured the system to use multiple currencies for Products, additional columns are available so that you can specify prices for all of the currencies.
8. Click **Edit** and enter a price for each UOM in each price lists.
9. Click **Save** and then click **Continue**.
10. Continue to create more products in this way. The new Products are displayed on the **Products** tab.
    The user can now begin creating a Quote and select the Pricing List to be used, for example Wholesale or Retail.

If you configured the system to use multiple currencies for Products, the user can also select the currency to be applied to the Quote or Order, and all subsequent Line Items.

When the Line Item is added to the Quote, the Product Family, Product, and Unit Of Measure can be specified. As a result, the correct price is automatically added to the List Price and Quoted Price fields. The value Quoted Price field can be changed to provide a line discount, which will be reflected in the Line Item Discount field when the item is saved.

### Editing a Product

1. Click **<My Profile> | Administration | Data Management | Products.**
2. Enter the product name in the Products Find page and click **Find**.
3. Click the product hyperlink.
4. Click **Change**.
5. Make your edits. For example, you can change the list price of an existing product in List Price. Users see the new price when they select the product in the future. Products already linked to opportunities at the old price aren't affected.

6. Click Save.

Deleting a Product

You can delete a Product that's not associated with a quote or an order. If a Product is no longer used, but is associated with a quote or an order, you can set the status to Inactive to prevent users selecting the Product in the future.

You can also delete a Product Family from the Product Families tab, if there are no Products associated with the Product Family

1. Click <My Profile> | Administration | Data Management | Products.
2. Enter the product name in the Products Find page.
3. Click Find.
4. Click the product hyperlink.
5. Click Delete and click Confirm Delete.

Working with Opportunity Items

Opportunity Items is the predecessor of the Quotes and Orders product functionality. If you've upgraded from a previous version of Sage CRM, you can use Quotes and Orders instead of Opportunity Items or continue using Opportunity Items. If you're using a newer version of Sage CRM, Opportunity Items is automatically replaced by the Quotes and Orders product functionality and Use Opportunity Items settings aren't available.

1. Click <My Profile> | Administration | System | System Behavior.
2. Click Change.
   
   - To use Quotes and Orders instead of Opportunity Items, ensure Use Opportunity Items is set to Quotes and Orders.
   - To continue using Opportunity Items instead of Quotes and Orders, set Use Opportunity Items to Opportunity Items.
3. Click Save.

To transfer existing Opportunity Items to the Products tab, click Upgrade Products on the Product Configuration page.
Multicurrency support

- Currency considerations
- Enabling multicurrency support
- Changing the base currency
- Setting up currencies and rates
- Setting currency preferences

Currency considerations

Before setting up currencies and currency fields, please note the following:

- Decide on the base currency at the beginning of your implementation and do not change it.
- Decide on a process for maintaining the currency rates against the base currency—how often, and by whom. For some organizations, a quarterly update may be sufficient. Others may decide on daily or weekly.
- Currency fields allow you to specify a value and a currency. The value remains the same on the record regardless of exchange rate changes. If a customer is quoted USD 100,000 for a project, it will remain USD 100,000. This is the value stored in the database. However, a user reporting on the data in another currency may see a change in the project value, if the exchange rates have been changed since the last time the report was run.
- The converted values of currency fields are calculated by triangulation. The monetary value entered by the user is divided by the currency specified to get the value in the base currency, then multiplied by the exchange rate specified for the user’s preferred currency.

Enabling multicurrency support

Multicurrency support different users to use different currencies. For example, a user in the UK can quote in Sterling, a user in Germany can quote in Euro, and a financial controller in the US can run a forecast report in US dollars. Multicurrency support is enabled by default if you install demo data during the Sage CRM installation.

1. Click <My Profile> | Administration | Data Management | Currency Configuration.
   - To enable multicurrency, ensure Is Single Currency is set to No.
   - To disable multicurrency, set Is Single Currency to Yes. The default currency is displayed in read-only format against all currency type fields in Sage CRM.
2. If you installed demo data and want to check which currency is the default currency, click <My Profile> | Administration | Data Management | Currency Configuration. The default currency is displayed in Base Currency.

## Changing the base currency

You can change the base currency to any other currency that's set up in the system.

1. Set the rate of the new base currency to 1. You can't edit the details of the base currency.
2. Click <My Profile> | Administration | Data Management | Currency Configuration.
3. Click Change.
4. Select the new currency from Base Currency.
5. Click OK and click Save.
6. To confirm the base currency, click <My Profile> | Administration | Data Management | Currency.
7. Manually change all existing exchange rates to reflect the new base.

## Setting up currencies and rates

When you've defined the base currency, you can set up other currencies.

1. Click <My Profile> | Administration | Data Management | Currency.
2. Click New.
3. Complete the Standard currency fields and Custom currency fields.
4. Click Save.
5. If the correct description does not automatically appear when you save the currency, check that you have entered the correct symbol. If the description is still not displayed, set up a new translation using the Currency Symbol as the Caption Code. For more information, see Translations and help.

### Standard currency fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Currency description. For example, USD, EUR, GBP. The currency description is maintained in &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Symbol</td>
<td>Currency symbol. For example, $, £.</td>
</tr>
</tbody>
</table>
Precision | Number of decimal places to which converted values in this currency must be calculated. This setting is overridden by the Decimal Places user preference setting. For more information, see User Preferences fields.

Rate | Conversion rate against the base currency. When you are adding the base currency, set this to 1.

### Custom currency fields

You can convert existing fields to currency fields, or add new currency fields to tables and screens. For example, you could add a new Cost of Sale field to the Opportunity table with a Currency entry type, and then add this field to the Opportunity Detail Screen. For more information, see Fields.

### Setting currency preferences

You can set your currency preference to any currency that has been set up in Sage CRM.

1. Click <My Profile> | Preferences.
2. Click Change.
3. Set Currency to your preferred currency.
4. Click Save. A converted value is displayed beside any currency values entered. Values from currency fields are displayed as converted values in reports.

### Sales Forecasts

- Changing Forecast settings
- Forecast settings

### Changing Forecast settings

Sales Forecast configuration settings are applied to all Forecasts created by users.

1. Click <My Profile> | Administration | Data Management | Forecast.
2. Click Change.
3. Change the Forecast settings.
4. Select Save.
Forecast settings

The following table describes the fields on the Forecasts settings page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year Start Month</td>
<td>Select the month that your fiscal year starts in from this field. For example, if your fiscal year starts in April, your Q2 comprises July, August, and September.</td>
</tr>
<tr>
<td>Overwritable Forecast</td>
<td>When set to Yes, the user can override the forecast figures, which is calculated automatically in the Forecasts tab.</td>
</tr>
<tr>
<td>Forecast Precision</td>
<td>Specify the decimal place precision of forecast figures in this field.</td>
</tr>
</tbody>
</table>

Related entities

- Adding new relationship types
- Relationship definition fields
- Changing relationship types
- Deleting relationship types
- Customizing related entities Search Select Advanced lists
- Reporting on related entities

Adding new relationship types

Info Manager or System Administrator.

You can set up relationship types to reflect many-to-many reciprocal relationships between primary entities. Users can then define the relationships using the Relationships tab displayed on all primary entities.

1. Click <My Profile> | Administration | Data Management | Manage Relationship Types.
2. Click New.
3. Complete the Relationship definition fields.
   - Select the Parent/Child relationship type for relationships where there is an obvious hierarchy or a concept of "ownership" involved.
   - Select the Sibling relationship type where the relationship is of an "influencing" or "affecting" nature.
   - Be consistent with the naming conventions of your relationship types. It is recommended that "doing words" (verbs) using the same tense form the basis of the Relationship Name.
format helps the End User "read" the Relationship screen from the current context at the top downwards: [noun] + [verb] + [noun].

- For example, to track the influence of Company Directors on your customer base, you could create a Parent/Child Relationship Type. The Parent Entity is the Person, who **Directs** (Relationship Name on Parent) the Company (Child Entity). The Company is **Directed By** (Relationship Name on Child) the Person.

4. Click **Save**.

### Relationship definition fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship Type</td>
<td>Select from Parent/Child or Sibling. For example, Parent/Child.</td>
</tr>
<tr>
<td>Parent/Sibling Entity</td>
<td>Select the Parent or Sibling from a list of primary entities. For example, Person.</td>
</tr>
<tr>
<td>Child/Sibling Entity</td>
<td>Select the Child or Sibling from a list of primary entities. For example, Company.</td>
</tr>
<tr>
<td>Relationship Name (On Parent/Sibling Entity)</td>
<td>The relationship name of the Parent or first Sibling Entity. For example, Directs.</td>
</tr>
<tr>
<td>Relationship Name (On Child/Sibling Entity)</td>
<td>The relationship name of the Child or second Sibling Entity. For example, Directed By.</td>
</tr>
<tr>
<td>Description</td>
<td>A long description of the relationship type. For example, Influence of Directors on Company.</td>
</tr>
<tr>
<td>Display Color</td>
<td>The color of the heading of the entities grouped into this relationship type.</td>
</tr>
</tbody>
</table>

### Changing relationship types

Once you've set up a relationship type, you can change the names, description and display color, but not the entities.

1. Click **<My Profile> | Administration | Data Management | Manage Relationship Types**.
2. Click the relationship you want to change.
3. Click **Change**.
4. Make your changes and click **Save**.
5. Click **Continue**.
Deleting relationship types

1. Click <My Profile> | Administration | Data Management | Manage Relationship Types.
2. Click the relationship you want to delete.
3. Click Delete. A warning is displayed if relationships have already been set up using this relationship type.
4. Click Confirm Delete.

Customizing related entities Search Select Advanced lists

To customize Search Select Advanced lists for related entities, change translations with a caption family of SS_RelViewFields. For example, the current Search Select Advanced list for cases displays the Company Name, Case Reference ID, and Case Description. You can change this to display the first and second columns only.

1. Click <My Profile> | Administration | Customization | Translations.
2. Search for the caption family SS_RelViewFields.
3. Click the caption code hyperlink for the Search Select Advanced list.
4. Modify the language translations. For example, you could remove a column.
5. Click Save.

Reporting on related entities

Sample reports for related entities are included in Reports | General. They use the vListRelatedEntityReportData view to display information about related entities. You can use this view to create new views for the Company or other entities to display related entities information.
Email and documents

- Email
- Exchange Integration
- Classic Outlook Integration
- Lite Outlook Integration
- E-marketing
- MailChimp Integration
- Document templates
- Library Management
Email

- **Introduction to email**
- Standard Sage CRM email
- Email Management

**Introduction to email**

- **Standard Sage CRM email functionality** lets users send and record emails using the embedded email editor or Microsoft Outlook and it creates communication records for outbound emails. The embedded email editor and Outlook are not mutually exclusive options for sending email, you can enable both.

- **Email Management functionality** is an optional extra to Standard Sage CRM email. It is a Windows service that runs as a background process on the Sage CRM server and processes inbound and outbound emails according to predefined business rules. It's installed automatically with a Sage CRM installation but must be set up and customized. It works with both the embedded email editor and Microsoft Outlook to handle outbound mail. It can also transfer information from inbound mails in your Outlook mailbox into Sage CRM.

**Standard Sage CRM email functionality**

Standard Sage CRM email lets users do the following.

- Send emails directly from Sage CRM to companies and people stored in the Sage CRM database, and to other Sage CRM users using the embedded email editor or Microsoft Outlook. The embedded email editor and Outlook are not mutually exclusive options for sending email, you can enable both.

- Send emails from the **Communications** tab in the context of a Person, Company, Lead, Opportunity, Case, or Solution. Send emails from the Solutions Summary page that automatically include the solution details in the email body.
  - Use **Send Email** to send an email using the embedded email editor. The specified mail server handles the transfer of the message.
  - Use **Send Using Outlook** to open an MS Outlook window and send an email using Outlook. The email includes recipients already selected in Sage CRM and any content already added. This option is available in Internet Explorer and Microsoft Edge only.

- Automatically create an Email Out communication record, which is linked to the customer record.
  - If the user clicks **Send Email**, a communication record is created that includes the email content and attachments.
  - If both Outlook and the embedded email editor are enabled, and the user clicks **Send Using Outlook**, a communication record is created. It includes only the text written before the user
clicks **Send Using Outlook**. Additions and changes that the user makes to the email in Outlook aren’t included.

- If Outlook is enabled as the mail editor and the embedded email editor is disabled, and the user clicks **Send Using Outlook**, no communication record is created.
- Use the embedded email editor in different modes. Specify how the editor is displayed to users by changing their preferences. For more information, see Preferences in the **User Guide**.
- Use the embedded email editor to create and customize email templates. Templates can include merge fields, such as #pers_firstname#.
- Set up From and Reply To email addresses, for example sales@domain.com. In addition, you can specify which Sage CRM users have rights to use each of the email addresses.
- Send mass emails in HTML format to group recipients.

## Email Management functionality

Email Management is included in standard Sage CRM functionality but must be set up and configured.

Email Management lets users do the following.

- Forward or BCC an email to the Mail Manager Server filing address and to other email addresses, such as support@domain.com. Any email arriving at one of the email addresses defined in Email Management is subjected in Sage CRM to the rules in the associated template and rulesets. These rules specify where the email record is stored in Sage CRM.
- Forward inbound emails to any mail system. For example, in MS Outlook, to the Mail Manager Server filing address. This automatically files the email with the correct customer record in Sage CRM.
- Save attachments to filed emails in the Library tab of the corresponding Sage record.
- Specify multiple email addresses to file different types of inbound and outbound emails. For example, info@domain.com.
- Customize business rules in Sage CRM, by associating customized rulesets with each email address.
- Associate each email address with a script template. For more information, see *Working with script templates*. You can script templates using Email Objects. For more information, see the **Developer Help** on the [Sage CRM Help Center](https://www.sagecrm.com/help).

For information about the basic use of Email Management, see *Filing Inbound and Outbound Emails* in the **User Help**.

## Standard Sage CRM email

- Configuring standard email
- Email/SMS settings
- Establishing a secure email connection using TLS
- Setting email aliases
Configuring standard email

The options you select on the Email Configuration screen do not affect incoming emails because messages are not delivered directly to the Sage CRM system. Instead, they are delivered to your chosen mail server and read using the mail client. For example, emails are delivered to Microsoft Exchange (server) and read using Microsoft Outlook (client).

If you're running the Email Management Server you can forward emails to the Mail Manager Server Filing Address for filing. For more information, see Email Management. Alternatively, you can use the File Email option in the Lite Outlook Integration or the Document Drop options. For more information, see the User Guide.

1. Click <My Profile> | Administration | Email And Documents | Email Configuration.
2. Click Change and specify the Email/SMS settings.
3. To enable the embedded email editor, ensure Use CRM's embedded Email Client is set to Yes.
4. To let users send emails using Microsoft Outlook, set Allow Send Using Outlook to Yes.
5. To use the Internal SMTP mail client to deliver emails, choose SMTP from Send Mail Using. Enter the IP address of your SMTP mail server in Outgoing Mail Server (SMTP) and the SMTP port (25) in SMTP Port. Ensure port 25 is open and allows the transfer of messages.
6. To use CDOSYS to deliver emails, choose CDOSYS from Send Mail Using. Enter the IP address of your SMTP mail server in Outgoing Mail Server (SMTP) and the SMTP port (25) in SMTP Port. Ensure that the Simple Mail Transfer Protocol (SMTP) service is running in Windows services.
   - Click Start | All Programs | Administrative Tools | IIS Manager.
   - Click Deliver Email to SMTP Server and enter the configuration details of your SMTP mail server. This means that the email is delivered immediately to an online SMTP server.
   - Alternatively, select Store E-Mail in pickup directory to store the email on disk where it can be retrieved for later delivery.
7. To allow users send emails in HTML format, set Send Email As HTML to Yes.
8. To specify that standard Sage CRM outbound filing is used to file emails, set Outbound Emails Should Be Filed by to CRM. A copy of the email is stored in the communication record saved against the company or person to whom the email was sent.
9. Click Save.
## Email/SMS settings

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use CRM's embedded email editor</td>
<td>Enables the embedded email editor. Displays <strong>Send Email</strong> on all Communications tabs and activates the embedded email editor when the user clicks an email hyperlink in Sage CRM. The default value is Yes.</td>
</tr>
<tr>
<td>Allow send using Outlook</td>
<td>Displays <strong>Send Using Outlook</strong> on the embedded email editor which opens an Outlook window. The Outlook window includes any addresses and text already added to the email in Sage CRM but it doesn't include attachments. An email that's sent using this button is saved in the Outlook Sent Items. However, when using this button with standard Sage CRM email functionality, additional text or addresses added to the email in Outlook are not included in the Sage CRM Email Out Communication record. To overcome this limitation, combine this feature with Email Management. The default value is Yes.</td>
</tr>
<tr>
<td>Send mail using</td>
<td>The method used to send emails. <strong>Internal SMTP</strong>: Sage CRM acts as the SMTP client to the Outgoing mail server. You must specify the Outgoing mail server IP address and SMTP port. A limitation of this option is that the email is always recorded as a sent communication even in cases when the email has not been dispatched by the mail client. To overcome this, users can cc themselves when emailing companies and contacts so they can cross-reference communications with emails that have arrived in their mailbox. <strong>CDONTS/CDOSYS</strong>: You must specify the Outgoing mail server IP address and SMTP port, and set the CDOSYS options in IIS. You can access copies of sent emails listed in C:\IIS\mailroot\badmail to check for problems with email delivery. In Windows terminology CDONTS is now called CDOSYS. The functionality is the same from the user's perspective.</td>
</tr>
<tr>
<td>Send email as HTML</td>
<td>Set to <strong>Yes</strong> to send HTML emails.</td>
</tr>
<tr>
<td>Outbound emails should be filed by</td>
<td><strong>CRM</strong>: The standard Sage CRM outbound filing stores a copy of the email in the communication record saved against the company or person the email was sent to. <strong>Email Management Server</strong>: The Mail Management Server Filing address is BCCed on all outbound emails. The outbound email is filed according to the business rules applied to the BCC email address in the associated script file or the rulesets defined in Sage CRM.</td>
</tr>
<tr>
<td>Mail Manager Server filing address</td>
<td>The email address of the mailbox that Email Management runs on. For example, <a href="mailto:CRMmailmanager@domain.com">CRMmailmanager@domain.com</a>.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mail Manager Server filing address prefix</td>
<td>The prefix that's added between the mailto recipient and the Mail Manager Server Filing Address for mailto tags. The default value (&amp;bcc=) puts the Mail Manager Server Filing Address in the BCC line of the email.</td>
</tr>
<tr>
<td>Outgoing mail server (SMTP)</td>
<td>The name or IP address of the mail server if you're using Internal SMTP.</td>
</tr>
<tr>
<td>SMTP port</td>
<td>Change the default value only if your Email Server Port differs from 25.</td>
</tr>
<tr>
<td>Use TLS for SMTP</td>
<td>Select this checkbox to establish a connection to the mail server using Transport Layer Security (TLS).</td>
</tr>
<tr>
<td>SMTP user name</td>
<td>The SMTP server username if the mail server is using Basic SMTP authentication.</td>
</tr>
<tr>
<td>SMTP password</td>
<td>The SMTP server password if the mail server is using Basic SMTP authentication.</td>
</tr>
<tr>
<td>SMS domain name</td>
<td>The SMS gateway that receives messages from the incoming mail folder of an email server. The address format it recognizes to send as the SMS message is &lt;phone number&gt;@&lt;SMS domain&gt;. For example <a href="mailto:086122346@sms.domain.com">086122346@sms.domain.com</a>.</td>
</tr>
<tr>
<td>SMTP server for SMS messaging</td>
<td>The name of the mail server or IP address of the machine on which it is installed. It's used to receive the emails to be sent as SMS messages.</td>
</tr>
<tr>
<td>Use TLS for SMS</td>
<td>Select this checkbox to send SMS messages using TLS.</td>
</tr>
<tr>
<td>Use SMS features</td>
<td>Enables SMS features. You must restart Sage CRM to enable SMS.</td>
</tr>
<tr>
<td>SMS from address</td>
<td>Any valid email address. It's used by the Send SMS workflow action. If this field is blank, the workflow rule tries to use the logged on user’s email address. If the logged on user’s address is not available, <strong>SMS From Address</strong> is not populated.</td>
</tr>
</tbody>
</table>

### Establishing a secure email connection using TLS

Transport Layer Security (TLS) establishes a secure connection from Sage CRM to a mail server. It lets you use Sage CRM with public mail services that require a secure connection such as Exchange Online, hosted Exchange, and Gmail.

There are some points to consider when using TLS with Sage CRM:

- You need the connection details for your mail server. Default SMTP over TLS details for Exchange Online and Gmail are as follows:
  - Exchange Online: smtp.office365.com:587
  - Gmail: smtp.gmail.com:465
- If you’re using Gmail, you might need to generate a per-application password to use SMTP. See https://security.google.com/settings/security/apppasswords.
- If you’re using Exchange Online, consider the daily send limits.
- Ensure your antivirus software and firewall allow outbound SMTP from the CRM web server.

To use TLS with standard Sage CRM email:

1. Click <My Profile> | Administration | Email and Documents | Email Configuration.
2. Click Change. The Email/SMS settings screen opens.
3. Enter your SMTP username and password.
4. Select Use TLS for SMTP to enable TLS support for the mail server.
5. Enter your SMS domain name and SMTP server for SMS messaging.
6. Select Use TLS for SMS.
7. Click Save.

To use TLS with Email Management:

1. Configure TLS for standard email. See the steps above.
2. Click <My Profile> | Administration | Email And Documents | Email Management Server Options.
3. Click New. You must set up options on the outbound email mailbox first. For more information, see Configuring Email Management.
4. Select Use TLS for POP and Use TLS for SMTP.
5. Click Save.

**Setting email aliases**

You can specify a list of Sage CRM accounts that can be used for sending emails. These accounts can be restricted to particular teams or individual users. For example, the support@domain.com email address can be made available only to users in the Customer Service Team and a number of specified users.

1. Click <My Profile> | Administration | Email And Documents | Email Aliases.
2. Click New.
3. Enter the address to send emails from in Email Address.
4. Enter the name that the recipient sees in Display Name.
5. To allow emails be sent from the specified email address, select Enabled as a From address.
   - Choose the teams that can send emails from this address from Restrict to Teams. For example, choose Customer Service and Operations to allow only users in the Operations and Customer Service teams to send emails from the address.
   - Choose individual people who can send emails from this address from Restrict to Users.
6. To allow replies be sent to this email address, select Enabled as a Reply to address.
   - Choose the teams to which reply emails are sent from Restrict to Teams. For example, a reply to an email sent from support@domain.com is sent to the Customer Service Team.
Choose individual people to whom reply emails are sent from **Restrict to Users.**

7. **Click Save.**

Users can send emails from the address set up on the From and Reply To Email Addresses page. For more information about sending emails, see the *User Guide.*

---

**Setting up email templates**

You can use the embedded email editor to set up email templates to save time and effort. You must enable the embedded email editor in order to use it. For more information, see Configuring standard email.

1. **Click** <My Profile> | Administration | Email and Documents | Email Templates.
2. **Click New.**
3. **Enter a name in Template Name.**
4. **To restrict the use of the template to a specific context, choose an entity from For entity.** If you choose **Person**, the template is available only in the Person Communication screen. You can add merge fields in the template for this entity only. For example, to include the merge field "#pers_firstname#", you must choose **Person** from **For Entity**.
5. **Choose a From address.** Your email address is the default value. Other options depend on what your System Administrator has configured and your permissions. If this field is set to **None**, the email comes from the user who's currently logged on.
6. **Type and format the email content.**
   - To specify merge fields, ensure you select the entity to which the merge fields relate from **For Entity**.
   - You can include HTML content in the email body. For more information, see Groups in the User Guide.
   - To attach a global document, use the **Search Select Advanced** icons to locate the file, select the file and then click **Upload Attachment.**
   - To attach a local file, click **Browse**, navigate to the file, and click **Upload Attachment.**
   - To add an inline image, browse to the file and click **Upload Inline Image.** To do this, you must select **Yes** in <My Profile> | Administration | Email and Documents | Email Configuration | Send Email As HTML.
   - To remove an attachment, click **Delete.**
   - To format the content of the email, use the **Text editor buttons.**
7. **Click Save.** The new template is added to the list of available templates and is available for reuse. All the values and content you entered in the template, including attachments, are part of the template.

---

**Translating reply and forward header text**

When a user replies to an email or forwards an email in Sage CRM, the original email body and header are automatically included in the new email.

There are four translatable templates for this information, with the following caption codes:
Email Management

- Email Management overview
- Running the Email Management service
- Configuring Email Management
- Working with script templates
- Adding rulesets to Email Management

Email Management overview

Email Management processes emails as follows.
- The user sends an email to a specified email address. For example, info@domain.com.
- The Email Management service accesses the mailbox.
- The service reads each email in the mailbox.

For each email read, the following happens.

- The Email Management service reads the custom script into memory and builds the user defined rulesets if they have been defined in the system. For more information, see Adding rulesets to Email Management.
- The rulesets are inserted into the script file as JavaScript. Rulesets are already built into the default Communication.js script.
- A number of ready-built Objects are passed into the script file, including one to access email.
- The script is executed internally from the application and actions are taken on the email. For example, a new communication is generated that includes information from the email.
- Attachments are saved in the Sage CRM Library.
- The email is deleted from the mailbox.
- If the script fails, the script and error information is written to the daily log file. You can access the log file from the main system directory. For example, \Program Files\Sage\CRM\Services\logs\yyyyymmdd<installname>MailManager.log. Alternatively, click View Log Files on the Email Management Server Options screen. Emails that cause the system to fail internally are saved in a rogue email folder in \Program Files\Sage\CRM\Services\CustomPages\Scripts.
- You can modify the script to connect to an external database.
- Each mailbox is accessed and controlled by its own thread within the application.

**Running the Email Management service**

The Email Management service is automatically installed on the Sage CRM server during a Sage CRM installation. The service applies to all Sage CRM installations that are configured for Email Management regardless of which installation it was registered on. Do not move the service from the folder in which it was registered. If you have problems starting the Email Management service, you may need to install it manually.

There should be just one eWareEmailManager.exe on the server.

- Installing the Email Management service
- Uninstalling the Email Management service

**Installing the Email Management service**

If you have problems starting the Email Management service, you may need to install it manually.

1. Click **Start | Run** and type `cmd`. The DOS prompt window is displayed.
2. Navigate to the folder where the eWareEmailManager.exe file is saved and type `eWareEmailManager /i`.
3. Click **Enter**. A pop-up box confirms that the application is installed.
Uninstalling the Email Management service

1. Click **Start | Run** and type `cmd`. The DOS prompt window is displayed.
2. Navigate to the folder where the eWareEmailManager.exe file is saved and type `eWareEmailManager /u`.
3. Click **Enter**. A pop-up box confirms that the service is uninstalled.

Configuring Email Management

1. Click **<My Profile> | Administration | Email And Documents | Email Configuration** and click **Change**.
   - To configure the Email Management server to file outbound emails, choose **Email Management Server** from **Outbound Emails Should Be Filed By**.
   - Enter the email address of the mailbox to which outbound emails are sent in **Mail Manager Server Filing Address**. Email Management can run on this mailbox and file outbound emails. This email address must be unique and used for Email Management only. The mailbox cannot be used for any other purpose and it cannot be a person’s private mailbox.
   - Ensure the value in **Mail Manager Server Filing Address Prefix** is correct. For more information, see **Email/SMS settings**.
2. Click **Save**.
3. Click **<My Profile> | Administration | Email And Documents | Email Management Server Options** and click **New**. You must set up options on the outbound email mailbox first. All emails in the mailbox are filed according to these options by default or if the conditions specified in any rulesets are not met.
   - Select **Enabled** to activate Email Management on the mailbox.
   - Enter the Mail Manager Server Filing Address in **Email Address**. This is the address you specified in step 1.
   - Set values for the remaining **Email Management Server Options**.
4. Click **Save**. You can then set up Email Management Server Options on other mailboxes. For example, `support@domain.com`.
5. Click **<My Profile> | Administration | Email and Documents | Advanced Email Management Server Options** and click **Change**.
   - Enter the username and password of a Sage CRM user with access rights to the database in **Manager Logon** and **Manager Password**. We recommend using the System Administrator.
   - Set values for the remaining **Advanced Email Management Server Options**.
6. Click **Save**.
7. To further customize Email Management, you can set up rulesets and customize script templates. For more information, see **Adding rulesets to Email Management** and **Working with script templates**.
## Email Management Server Options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
<td>Enables Email Management on the mailbox. Allows you to maintain a list of multiple addresses, activating and deactivating them as required. For example, <a href="mailto:specialoffers@domain.com">specialoffers@domain.com</a> is required in the last month of each quarter, but should not be available in other months.</td>
</tr>
<tr>
<td>Mail box access method</td>
<td>The method used to access the mailbox. Values are POP and MAPI.</td>
</tr>
<tr>
<td>Email Address</td>
<td>The email address of the mailbox on which Email Management is enabled. If you're configuring options for the outbound email mailbox, enter the Mail Manager Server Filing Address. This is the address you specified in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>POP Server/MAPI Profile Name</td>
<td>The name of the POP server used for incoming mail or the MAPI profile name. To check this name on the Sage CRM server, right-click the Microsoft Outlook menu option, and click Properties</td>
</tr>
<tr>
<td>POP3 Port</td>
<td>The port that POP3 can use to send emails.</td>
</tr>
<tr>
<td>Use TLS for POP</td>
<td>Select this checkbox to receive emails from the POP email account using TLS.</td>
</tr>
<tr>
<td>POP Account Name/MAPI Mailbox Name</td>
<td>The user name of the POP email account or the MAPI mailbox name. To check this name on the Sage CRM server, right-click the Microsoft Outlook menu option, and click Properties</td>
</tr>
<tr>
<td>POP/MAPI Password</td>
<td>The password for the POP or MAPI server.</td>
</tr>
<tr>
<td>SMTP Server</td>
<td>The name of your SMTP server if your SMTP server is different to your POP server. If left blank, Email Management uses your POP server for outbound mails. The field is not required for MAPI.</td>
</tr>
<tr>
<td>SMTP Port</td>
<td>The port that SMTP can use to send emails.</td>
</tr>
<tr>
<td>Use TLS for SMTP</td>
<td>Select this checkbox to send emails to the SMTP server using TLS.</td>
</tr>
<tr>
<td>SMTP User Name</td>
<td>The user name for the SMTP server, if required by the Mail Administrator.</td>
</tr>
<tr>
<td>SMTP Password</td>
<td>The password for the SMTP server, if required by the Mail Administrator.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administrator Email Address</td>
<td>The email address to which service messages are sent when the service starts or if there's a problem with the service.</td>
</tr>
<tr>
<td>CRM User</td>
<td>The Sage CRM user that Email Management considers to be the logged on user. For example, when Cases and Communications are created, this user is specified as the user who created them.</td>
</tr>
<tr>
<td>Template</td>
<td>The script file used to process the email. Script files are shipped as part of Email Management and allow you to specify various ways to handle emails. For more information, see Email Management and objects.</td>
</tr>
<tr>
<td>Default Ruleset Assigned User</td>
<td>The default user to which the Case or Communication is assigned.</td>
</tr>
<tr>
<td>Default Ruleset Assigned Team</td>
<td>The default team to which the Case or Communication is assigned.</td>
</tr>
<tr>
<td>Default Ruleset Action</td>
<td>The default action. For example, the Track Case action means that most emails are filed as cases and assigned a Case ID but if the email already contains a Case ID, a Communication is filed to track the case.</td>
</tr>
<tr>
<td>Feedback on Success</td>
<td>Sends information about successful emails to the administrator.</td>
</tr>
<tr>
<td>Feedback on Failure</td>
<td>Sends information about failed emails to the administrator.</td>
</tr>
</tbody>
</table>

**Advanced Email Management Server Options**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Logon</td>
<td>The logon name of a Sage CRM user with access rights to the database. For example, the Admin user.</td>
</tr>
<tr>
<td>Manager Password</td>
<td>The password of a Sage CRM user with access rights to the database.</td>
</tr>
</tbody>
</table>
| Debug          | Sets the level of debugging.                                                                                                        
|                | Set to **Yes** to poll the mail server every 20 seconds and send information to a log file in the Sage CRM install directory. For example, ...\Program Files\Sage\CRM\Services\logs\<Todays_date><installname>mailmanager.log
|                | You should set to **Yes** when you first set up and test the service.                                                                
|                | Set to **No** to poll the mail server less frequently and send less detailed information. You should set to No after testing for improved performance.    |
|                | You can access the log file  
|                | The script is emailed to the administrator specified in Manager Logon and the section where the script failed is highlighted.                        |
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polling Interval</td>
<td>The polling interval (in minutes) at which Email Manager services poll a</td>
</tr>
<tr>
<td></td>
<td>specified mailbox.</td>
</tr>
</tbody>
</table>

### Additional Steps for MAPI

You can configure the Email Management server to use Messaging Application Programming Interface (MAPI).

- Ensure Microsoft Outlook is installed.
- Navigate to your Services folder and double-click the **Email Manager service**.
- On the Email Manager Properties dialog box, click the **Log On** tab.
- The service runs under a local system account by default (for POP). Change this to the domain account with permissions for all mailboxes you want Email Management to access and run on.

MAPI is Microsoft’s proprietary messaging API and is enabled by default by Microsoft Exchange.

### Email status

To see if the Email Management service is currently running, and to view the number of outbound emails and bad email, click `<My Profile> | Administration | Email and Documents | Email Status`.

### Working with script templates

Script templates specify how emails are handled. You can associate a template with specific mailboxes and you can use Email Objects to customize the script templates. For example, to change the way in which email attachments are saved.

For more information about working with Email Objects, see Email Management and objects and Customizing script templates using objects.

Two script templates are provided with Email Management:

- Communications.js (Communications template) is deployed by default when you set up Email Management. For information about email handling when you are using the Communications template, see Working with the Communications template.
- Support.js (Support template) is for use in a customer support environment. For information about email handling when you are using the Support template, see Working with the Support template.

There are three core functions are at the base of both Communications.js and Support.js that run in the following order: BeforeMainAction, MainAction, AfterMainAction.

BeforeMainAction and AfterMainAction are declared in the script file. MainAction is not declared. The MainAction function is generated from the rules defined on the Rules input form in Sage CRM. The function should never be declared in any JavaScript file used with Email Management. If you require any complex functionality, it can be coded into the BeforeMainAction or AfterMainAction functions.
We recommend that you use one of these scripts. However, if neither are suitable, you can write a new script. Please contact your Certified Sage CRM Consultant before writing new scripts. You must implement new scripts in a test environment before installing them on a live system.

**Working with the Communications template**

When the default Communications template is used for Email Management, all emails sent to the default mailbox are filed in the Sage CRM database as communications and all corresponding email attachments are filed in the CRM Library tab.

When an email is received in the specified mailbox, the email database table is checked for all people associated with the email address. If only one person is associated with the email address (even if it’s a private and business type), a communication is created for that person, and it’s also associated with the Sage CRM user. If an associated person cannot be found or if multiple people are associated with the address, the email database table is checked for an associated company. A communication is created for the company and it's also associated with the Sage CRM user.

**Outbound email**

For each outbound email, a communication is created with a communication link to each recipient in the Sage CRM database. If no match is found, the email is saved as a completed communication against the Sage CRM user only. The sender must be a valid Sage CRM user with an email address in the Sage CRM database, and the specified Mail Manager Server Filing Address must be in the **BCC** field.

When the email is successfully sent, the customer receives the email, a communication is recorded in Sage CRM, and the email handling details are added to the log file. Depending on the polling interval that you've configured in **Advanced Email Management Server Options**, the communication might not appear in Sage CRM immediately.

**Inbound email**

For emails received by users and forwarded to the Mail Manager Server Filing Address, this email address must be the only address in the **To** field. The original sender’s email address must be the first email address contained in the body of the email that’s forwarded to the mailbox. Email Management recognizes the first address in the body as the original sender’s address and files the email with this customer record. A communication record is created against the customer record containing details of the email forwarded from the Sage CRM User.

**Attachments to emails**

Attachments to emails are stored with the communication record created when Email Management filed the inbound or outbound email.

For information about using Email Management, see **Filing Inbound and Outbound Emails** in the User Help.
Working with the Support template

Use the Support template (Support.js) with Email Management to handle emails effectively in a customer service environment.

This example uses a mailbox on the company's email server called support@domain.com. Customers can log customer service issues using this mailbox. The example describes what happens when an email is received by support@domain.com from a person or company in the Sage CRM database.

1. Kieran O'Toole, a person in the Sage CRM database, sends an email to support@domain.com to log a customer service issue.
2. An auto reply is sent to Kieran telling him that a case has been logged. It includes a Case ID. If Kieran's email already contained a Case ID, a new case would not be created.
3. A case is created and logged for the Customer Service Team. The case is included in the list of cases associated with Kieran O'Toole. It is also listed in Team CRM | Customer Service, because Customer Service is specified in Default Ruleset Assigned Team. For more information, see Adding rulesets to Email Management.
4. Two communications are recorded against Kieran, one to acknowledge receipt of his email (Email In) and another to signal that an auto reply was sent (Email Out). The Email Out communication is also included in Team CRM | Customer Service.
5. When Kieran replies to the email he received from support@domain.com to say that he has managed to get the software up and running, an Email In communication is recorded against Kieran and also in Team CRM | Customer Service.

Email Management and objects

1. When the Email Management service starts, it is started up it creates a Sage CRM Object and logs in to Sage CRM using registry entries.
2. Using the Sage CRM Object, the Email Management service queries the custom_emailaddress table. This table holds information about each service for the install.
3. The data is read in and the specified Script file is read in. Another Sage CRM Object is created and logged onto using the Sage CRM User logon ID. Using the email account information, the mailbox is logged onto and the emails are read. An interface object to the email is created. This is called the MsgHandler Object.
4. Using the From address in the email, the database is queried to:
   - Check if the email belongs to a user. A UserQuery CRM Query Object is created, which runs the following script.
     SELECT * FROM vUsers WHERE user_emailaddress = FromAddress
     OR
     user_mobileemail = FromAddress
   - Check if the email belongs to a company. A CompanyQuery CRM Query Object is created, which runs the following script.
     Select * from vCompanyEmail where elink_recordid = comp_companyid and emai_Emailaddress = FromAddress
• Check if the email belongs to a person. A PersonQuery CRM Query Object is created, which runs the following script.

  Select * from vPersonEmail where elink_recordid = pers_Personid
  and email_emailaddress = FromAddress

5. All the Objects mentioned are passed into the script context and the specified actions are performed.

Customizing script templates using objects

You can customize the features of Email Management using the following objects. For detailed descriptions of the methods and properties of each object, see the Developer Help on the Sage CRM Help Center.

• **MsgHandler Object**: The MsgHandler Object provides basic access to the Email Object and functionality for the system. It is the top level object within the scripting. It is passed into the script at run time.

• **Email Object**: The Email Object provides access to the email itself through its properties and methods. This object is passed into the script by default as the Email Object but can also be accessed from the MsgHandler Object as follows:

  myemail = MsgHandler.msg

• **AddressList Object**: Part of the Email Object, this object provides access to the To, CC and BCC lists of addresses. You can access this object as follows:

  myaddresslist = email.CC;

• **MailAddress Object**: This object provides access to an individual address from the AddressList Object. You can return an individual MailAddress object as follows:

  myaddress = email.CC.Items(1);

• **AttachmentList Object**: This object provides access to the email attachments. You can access this Object as follows:

  myAttachmentList = email_ATTACHMENTS;

• **Attachment Object**: This object provides access to an individual attachment. You use the AttachmentList Object's "items" property to access this object.

  myAttachment = email.Attachments.Items(1);

Adding rulesets to Email Management

You can set up rulesets so that specific actions are applied to particular emails. Rulesets consist of multiple rules and an action to be performed when the conditions in one or more of the rules are met. This action overrides the default email handling action. You can create any number of rulesets and each ruleset can have a maximum of three rules.

For example, you could specify that all emails coming into the support@domain.com mailbox are filed in Team CRM | Customer Service according to the Track Case action by default. But any emails from companies of type Competitor or Industry Analyst should be handled in a different way. To do this, you can apply a new ruleset to the support@domain.com mailbox.

1. Click **<My Profile> | Administration | Email and Documents | Email Management Server Options**.
2. Click the hypertext link of the Email Management service and click **Add Ruleset**.
4. Add up to two more rules for this ruleset. Use **And** to separate rules when both rules must be true for an action to be performed. Use **Or** to separate rules when the action is performed if either of the rules are true.
5. Choose the action that's performed if the rules are met. If the rules are not met, the default actions are performed. For example, create a communication.
6. Choose the Sage CRM user and the team that the action is recorded against from **Assigned User** and **Assigned Team**. For example, a Communication is created if a rule is satisfied, and it is assigned to the marketing manager and the Marketing Team.
7. Click **Save** and then click **Continue**.

### Rules Panel fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ruleset Description</td>
<td>A description of the Ruleset.</td>
</tr>
<tr>
<td>Column Name</td>
<td>The database column on which the Rule acts.</td>
</tr>
<tr>
<td>Operator</td>
<td>The operator used in the Rule. For example, Equal To, Not Equal To.</td>
</tr>
<tr>
<td>Value</td>
<td>A value that corresponds to the selected column name.</td>
</tr>
<tr>
<td>Rule Execution Order</td>
<td>The order in which the Ruleset is executed. For example, if you have defined three Rulesets, you can specify a specific order or execution.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Enables the Ruleset.</td>
</tr>
<tr>
<td>Exit Rule</td>
<td>Performs the associated action when this Ruleset is executed, but does not execute any other Ruleset.</td>
</tr>
</tbody>
</table>

### Exchange Integration

- About Exchange Integration
- Setting up Exchange Integration
- Synchronizing Exchange and Sage CRM

### About Exchange Integration

- Exchange Integration overview
- Duration of an initial synchronization
Sage CRM Exchange Integration is an integration between Sage CRM and the Exchange server. There is no synchronization to individual Outlook clients. The synchronization runs in the background and does not require user triggers; it continues even when Outlook clients are closed. A single, impersonated Exchange user is used to access all users' mailboxes so different credentials are not required for each mailbox.

**Warning:** You must enable Basic authentication so Exchange Integration can access Exchange data.

Appointments, tasks, and contacts can be synchronized between Sage CRM and Exchange Server. This functionality is supported if the user is working in the Outlook client, Outlook Web Access, or using a mobile device that connects to Exchange. For example, if a sales manager schedules meetings for field sales people in Sage CRM, the sales people receive information about the meetings on their smart phones without needing to synchronize or open their laptops and launch Outlook desktop client. This means that vital Sage CRM information is available in real-time to users who are on the move.

The optional Lite Outlook Plugin can be installed on the client machine to allow users add contacts to Sage CRM from the Outlook client, file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. For more information, see About Lite Outlook Integration. Each user can install the plugin or you can install it using Active Directory Group Policy. For more information, see Deploying the Plugin using Group Policy.
How to enable Exchange Integration

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back up the Exchange Server before integrating with Sage CRM.</td>
<td></td>
</tr>
<tr>
<td>Ensure you are using a version of Exchange Server with access to the EWS API that supports impersonated users.</td>
<td>See the Software Support Matrix for version information.</td>
</tr>
<tr>
<td>Expose the EWS virtual directory so an impersonated user can read the schema from the EWS endpoint.</td>
<td>Configuring Exchange Server</td>
</tr>
<tr>
<td>Set up an Exchange impersonated user mailbox to access the mailboxes of other Exchange users.</td>
<td>Configuring Exchange Server</td>
</tr>
<tr>
<td>Enable Basic authentication so Exchange Integration can access Exchange data.</td>
<td>Configuring Exchange Server</td>
</tr>
<tr>
<td>Create a connection from Sage CRM to the Sync Engine and from the Sync Engine to Exchange Server so data can be synchronized between applications.</td>
<td>Creating a connection to Exchange Server</td>
</tr>
</tbody>
</table>

How to use the Lite Outlook Plugin with Exchange Integration

Lite Outlook Integration lets users add contacts to Sage CRM from the Outlook client, file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. Lite Outlook Integration does not synchronize any data between Outlook and Sage CRM. For this reason, it should be used with Exchange Integration.

In order to use Lite Outlook Integration, a user must download and install a plugin on the Outlook client machine. The plugin works on both 32-bit and 64-bit machines. As a system administrator, you can enable Lite Outlook Integration and display the plugin button so the user can manually install the plugin. As an alternative to letting users manually install the Lite Outlook Plugin, you can use Group Policy to deploy the plugin to client machines and then hide it from specific users. For more information, see About Lite Outlook Integration.

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify in Exchange Server settings that the <strong>Install Lite Outlook Integration</strong> button is displayed. This button lets users download and install the Lite Outlook Plugin.</td>
<td>Creating a connection to Exchange Server</td>
</tr>
<tr>
<td>If you're using Sage CRM over HTTPS, or you're using a non-standard port, you might need to change the default port used by the Lite Outlook Plugin installer.</td>
<td>Changing Lite Outlook Plugin port</td>
</tr>
<tr>
<td>Enable logging for Lite Outlook Integration so you can view and resolve errors.</td>
<td>Enabling logging for Lite Outlook Integration</td>
</tr>
</tbody>
</table>
Tip: If Exchange Integration is enabled and the Lite Outlook Plugin is installed, Sage CRM users who haven't been enabled to synchronize with Exchange or who don't use Exchange can still file emails and add contacts to Outlook.

How to synchronize Exchange and Sage CRM

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the Sage CRM user mailboxes that you want to synchronize with Exchange.</td>
<td>Enabling user mailboxes for synchronization</td>
</tr>
<tr>
<td>Change the rules that are used to synchronize data between Sage CRM and Exchange to suit your particular business requirements if necessary.</td>
<td>Setting Exchange synchronization options</td>
</tr>
<tr>
<td>Enable Exchange Integration</td>
<td>Enabling Exchange Integration</td>
</tr>
<tr>
<td>Enable Exchange synchronization</td>
<td>Enabling Exchange synchronization</td>
</tr>
<tr>
<td>View synchronization logs to find out more about synchronization errors and how to resolve them.</td>
<td>Working with synchronization errors</td>
</tr>
</tbody>
</table>

Exchange Integration environment

The Exchange environment consists of the Mailbox server and the Exchange Web Services (EWS) API. The Exchange impersonated user reads schema from the EWS endpoint. Schema are made available by enabling Anonymous authentication and disabling Windows authentication on the EWS virtual directory. Data is made available by enabling Basic authentication in the Exchange Administration Center (EAC). On its own, Basic authentication is not a secure authentication method, so we recommend that you use Secure Sockets Layer (HTTPS) to secure the connection between Sage CRM and Exchange.

The Sync Engine synchronizes between endpoints. It obtains a batch of resource changes from a source endpoint (CRMJ) and applies it to a target endpoint (EWS). These records are stored on the EcngIntegration table.

The Sync Engine communicates with EWS using SOAP over HTTP(S) and it communicates with Sage CRM using HTTP(S) (SData and specialized services). It can be deployed on a remote server.
When the Sync Engine synchronizes data from Exchange to Sage CRM, Sage CRM performs deduplication and conflict management. Records are inserted, updated, or deleted in Sage CRM.

When the Sync Engine synchronizes data from Sage CRM to Exchange, the Sync Engine performs deduplication, inserts, updates, deletes on the mailboxes.

**Exchange Integration terminology**

- **Sync resource.** A record representing a single record that is synchronized and stored in the EcngSyncResource table. Each record has a unique UUID, references to the base Sage CRM entity, and details of when the record was synchronized.
- **Sync state.** The state of a record on the EWS side of the integration. Used to check for changes on the Exchange side of the integration.
- **Feed.** An XML structure used to transfer changes to resources on the CRMJ endpoint. It contains many entries.
- **Entry.** A subset of a feed that contains changes to a specific resource. For example, contacts.
- **Tick.** The incremental value for a resource type that’s incremented every time a resource is modified and indicates the version of the data. It is stored in EcngSyncDigestEntry.
- **Digest.** The synchronization state of a resource. It's similar to a tick, but applicable to individual entities. It is stored in EcngSyncDigestEntry.

**Exchange Integration database tables**

- **EcngIntegration.** Contains configuration information about the Exchange synchronization including the EWS URL, usernames and passwords.
- **EcngLocalEntityMapping.** Contains mappings from Exchange items to Sage CRM entities (for example, Appointment to Communication), the synchronization direction, and views used.
- **EcngLocalFieldMapping.** Contains mappings from Sage CRM fields to Exchange fields, and the field XML data types. You cannot customize or add anything to this table.
- **EcngSyncDigestEntry.** Contains two entries for each synchronized resource; task, contact, appointment. Contains one entry for the Sage CRM endpoint and one for the Exchange endpoint with a Tick value for each.

**Duration of an initial synchronization**

The first synchronization between Sage CRM and user mailboxes takes longer than subsequent syncs because data has not yet synchronized from one system to the other and therefore the volume of data to synchronize is greater. Also, the sync engine’s deduplication process is more active because there's a higher possibility that the same records exist in both Sage CRM and Exchange. For example, if Sage CRM and Exchange were previously used independently for calendar management, the same appointments might exist in each system. For more information on initial synchronization, please check the latest release notes and community articles.

We recommend that an initial synchronization is performed during Sage CRM and Exchange downtime because large volumes of data are transferred and may impact performance.

The time it takes to complete an initial synchronization depends on:
The number of user mailboxes synchronized
The volume of data synchronized
The sync direction for each entity synchronized
The number of potential duplicates detected by the sync engine
The size and complexity of the Sage CRM database
The hardware specifications of the Sage CRM server and Exchange Server

Synchronizing appointments

- Synchronizing appointments terminology
- Synchronized calendar data
- Appointment synchronization rules
- Stub appointments
- Appointment field mappings

Synchronizing appointments terminology

- **Organizer.** The organizer of an appointment is the user who creates the appointment in Exchange. The exception is where an appointment is created in a shared calendar. For example, an assistant creates a meeting for a manager using the manager’s shared calendar. In this case, because the manager owns the calendar, the manager is the organizer. The organizer must always attend the event. The organizer’s copy of an Exchange appointment is the only reliable version of the appointment and it's the version that’s synchronized to Sage CRM.

- **Sync user.** When configuring Exchange Integration, you must flag the mailboxes that will synchronize with Sage CRM. A user with an Exchange mailbox that’s been configured to synchronize is called a Sage CRM sync user.

- **Meeting.** An appointment with more than one attendee is a meeting.

- **Required attendees.** All Sage CRM users (including resource users, but excluding the organizer) and external attendees added to the appointment in Sage CRM appear as required attendees on the appointment in the organizer’s Exchange mailbox.

- **External attendees.** The External attendees feature in Sage CRM communications sends an Exchange meeting request to all invitees both internal and external to the Sage CRM database or your own Exchange environment.

Synchronized calendar data

Appointments are synchronized between Sage CRM and the default Exchange calendar only. Appointments are not synchronized between Sage CRM and any secondary Exchange calendars. The Sync Engine synchronizes the following calendar items between Sage CRM and Exchange if appointments are set to synchronize bi-directionally.

- All single (non-recurring) appointments and meetings that have not yet synchronized and have an End Date within the last 14 days or at any date in the future from the time the synchronization occurs.
• All recurring appointments that have not yet synchronized and where the end date of the recurrence pattern of the master occurrence is within the last 14 days or at any date in the future from the time the synchronization occurs.

• All single and recurring appointments that have already been synchronized and have been modified in either system since the last synchronization occurred.

• All single and recurring appointments that have already been synced and have been deleted in either system since the last synchronization occurred are deleted in the other system.

• During synchronization, private appointments in Sage CRM become private appointments in Exchange and visa versa.

• All required and optional attendees (including resource users, but excluding the organizer) whose email address matches a Sage CRM user email address and whose Response is Accepted, Tentative or Unknown, appear as Sage CRM users in the User selection list on the Sage CRM appointment. The appointment in Sage CRM is linked to the Sage CRM users.

• Any attendees whose email address matches a Sage CRM user email address and whose Response is Declined is not added to the appointment in Sage CRM.

Some calendar items cannot be synchronized between Sage CRM and Exchange.

• The following are not synchronized from Exchange to Sage CRM:
  • Recurring appointments with no end date.
  • Recurring appointments where the number of occurrences in the series exceeds the maximum number of allowable occurrences in Sage CRM. You can configure this number.
  • Yearly recurring appointments where a relative day of the week has been specified in the recurrence pattern. For example, day, weekday, or weekend-day.

• The following are not synchronized from Sage CRM to Exchange.
  • Single or recurring appointments where the organizer of the appointment has not been configured to synchronize with Exchange.
  • Recurring appointments with a daily recurrence pattern of “occurs every…”. This type of recurrence pattern is available in Sage CRMPrior to Exchange Integration only.

**Warning:** When a synchronized field on an Appointment is updated, a new request is sent to all attendees. This is particularly important to note when adding confidential information to an Appointment.

**Appointment synchronization rules**

• The Sync Engine uses the following rules to determine whether calendar items should be synchronized from an enabled Exchange mailbox to Sage CRM:
  • If the organizer of the appointment or meeting is the mailbox owner, the item is synchronized to Sage CRM as a normal Sage CRM appointment.
  • If the organizer is not the mailbox owner, this is an invitee copy of the original meeting. In this case, if the organizer is a Sage CRM Sync User, this invitee copy is not synchronized to Sage CRM. It is ignored and the organizer’s copy is synchronized from the organizer’s mailbox to Sage CRM when the Sync Engine synchronizes with the organizer’s mailbox.
- If the organizer is not the mailbox owner, this is an invitee copy of the original meeting. In this case, if the organizer is not a Sage CRM Sync User, there's no way to retrieve the organizer's copy of the meeting. For more information, see Stub appointments.

- The Sync Engine uses the following rules to determine whether calendar items should be synchronized from Sage CRM to the Exchange Server:
  - A single or recurring appointment which satisfies the date range rules is synchronized from Sage CRM to the mailbox of the organizer of the Sage CRM appointment.
  - The Sync Engine instructs the Exchange Server to send out meeting requests, or updates to a meeting, to the relevant invitees on the meeting. A Send Update method pushes the organizer’s copy to all invitees as per normal Exchange/Outlook behavior.
  
Sage CRM doesn’t synchronize anything to the invitee mailboxes. It synchronizes to the organizer mailbox and the Exchange Server handles all meeting request operations to ensure the Exchange calendars of all attendees contain the meeting. This means that an appointment or meeting that synchronizes from Sage CRM to Exchange is identical to an appointment or meeting that's created directly in the Exchange mailbox and all complex Exchange Server messaging rules are implemented by Exchange and are not compromised by Sage CRM.

**Stub appointments**

When a meeting is created in the organizer’s calendar in Exchange, an identical copy of the meeting is created as a tentative event in the calendar of each invitee. Each invitee can change their copy but the changes are visible to that invitee only and are not visible to the organizer or any other invitee.

To ensure that a user's Outlook/Exchange calendar mirrors their Sage CRM calendar, all invitee copies are synchronized to Sage CRM as separate Stub appointments. Each invitee sees their associated stub appointment only; the appointment is read-only but can be deleted. The exception to this is where the invitee forwards their copy of the meeting to other people. In this case, the organizer receives an email about the new invitees and the meeting in the organizer’s calendar is updated to include them. The original invitees are notified about the new invitees only if the organizer sends a meeting update.

An invitee cannot remove other invitees from their copy of the meeting. Any changes that an invitee makes to their copy of the meeting are temporary; whenever the organizer modifies the meeting and sends out an update, all existing invitee copies are overwritten by the organizer’s copy.

**Appointment field mappings**

<table>
<thead>
<tr>
<th>Outlook/Exchange Field</th>
<th>Sage CRM Field (Translation)</th>
<th>Sage CRM Field (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Subject</td>
<td>comm_subject</td>
</tr>
<tr>
<td>Location</td>
<td>Location</td>
<td>comm_location</td>
</tr>
<tr>
<td>Details/Body</td>
<td>Details</td>
<td>comm_note</td>
</tr>
<tr>
<td>Start Time</td>
<td>Date/Time</td>
<td>comm_datetime</td>
</tr>
</tbody>
</table>
### Outlook/Exchange Field | Sage CRM Field (Translation) | Sage CRM Field (Column)
--- | --- | ---
End Time | End Time | comm_todatetime
All Day Event | All day event | comm_isalldayevent
Organizer | Organizer | comm_organizer
Attendees | User / External Attendee | comm_userid / cmli_externalpersonid
Private | Private | comm_private
Importance | Priority | comm_priority
Reminder | Reminder | comm_notifydelta
Appended to Appt Body | CRM Info | Translation caption code OTL_AppointmentDetails
| | See Include CRM Info In Body in Synchronization management fields.

**Occurrence**
The Exchange master record recurrence pattern/range maps to the Sage CRM master record recurrence pattern/range.

### Synchronizing tasks

If tasks are set to synchronize bi-directionally between Sage CRM, the Sync Engine synchronizes tasks that have been modified or created within the last 14 days from when the initial synchronization was started.

Tasks are owned by one user only so synchronization occurs between Sage CRM and the Exchange mailbox of the task owner. Mass tasks (tasks generated against groups or lists) are not synchronized and are not included in the skipped items log.

The table below lists task field mappings.

<table>
<thead>
<tr>
<th>Outlook/Exchange Field</th>
<th>Sage CRM Field (Translation)</th>
<th>Sage CRM Field (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Subject</td>
<td>comm_subject</td>
</tr>
<tr>
<td>Details/Body</td>
<td>Details</td>
<td>comm_note</td>
</tr>
<tr>
<td>Start Date</td>
<td>Start Date/Time</td>
<td>comm_todatetime</td>
</tr>
<tr>
<td>Due Date</td>
<td>Due Date/Time</td>
<td>comm_datetime</td>
</tr>
<tr>
<td>Owner</td>
<td>User</td>
<td>comm_userid</td>
</tr>
<tr>
<td>Private</td>
<td>Private</td>
<td>comm_private</td>
</tr>
</tbody>
</table>
The table below lists task status mapping when synchronizing from Exchange to Sage CRM.

<table>
<thead>
<tr>
<th>Outlook/Exchange</th>
<th>Sage CRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Pending</td>
</tr>
<tr>
<td>In Progress</td>
<td>In Progress</td>
</tr>
<tr>
<td>Waiting On Someone Else</td>
<td>Pending</td>
</tr>
<tr>
<td>Deferred</td>
<td>Pending</td>
</tr>
<tr>
<td>Completed</td>
<td>Complete</td>
</tr>
</tbody>
</table>

The table below lists task status mapping when synchronizing from Sage CRM to Exchange.

<table>
<thead>
<tr>
<th>Sage CRM</th>
<th>Outlook/Exchange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Not Started</td>
</tr>
<tr>
<td>In Progress</td>
<td>In Progress</td>
</tr>
<tr>
<td>Complete</td>
<td>Completed</td>
</tr>
<tr>
<td>Canceled</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

### Synchronizing contacts

If contacts are set to synchronize bi-directionally between Sage CRM, the Sync Engine synchronizes contacts from My CRM | Contacts for users who have been flagged to synchronize. Updates and deletes to linked contacts are synchronized from Exchange to Sage CRM.

Contacts are not shared by Exchange mailboxes, but contacts from many mailboxes can be linked to one person record in Sage CRM. Click Add Contacts to manually add contacts from the Outlook client to Sage CRM. The Lite Outlook Integration Plugin must be installed on the Outlook client to use this functionality.

The table below lists contact field mappings.
<table>
<thead>
<tr>
<th>Outlook/Exchange Field</th>
<th>Sage CRM Field (Translation)</th>
<th>Sage CRM Field (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Salutation</td>
<td>pers_salutation</td>
</tr>
<tr>
<td>First</td>
<td>First Name</td>
<td>persFirstname</td>
</tr>
<tr>
<td>Middle</td>
<td>Middle</td>
<td>persMiddleName</td>
</tr>
<tr>
<td>Last</td>
<td>Last Name</td>
<td>persLastName</td>
</tr>
<tr>
<td>Suffix</td>
<td>Suffix</td>
<td>persSuffix</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
<td>compName</td>
</tr>
<tr>
<td>Job Title</td>
<td>Title</td>
<td>persTitle</td>
</tr>
<tr>
<td>Web Page Address</td>
<td>Website</td>
<td>persWebsite</td>
</tr>
<tr>
<td>Department</td>
<td>Department</td>
<td>persDepartment</td>
</tr>
<tr>
<td>Email</td>
<td>Email Address / Business</td>
<td>emaiEmailaddress / linkPersemai</td>
</tr>
<tr>
<td>Email 2</td>
<td>Email Address / Private</td>
<td>emaiEmailaddress / linkPersemai</td>
</tr>
<tr>
<td>Street</td>
<td>Combines Address 1, Address 2, Address 3, and Address 4</td>
<td>addr_address1 addr_address2 addr_address3 addr_address4</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
<td>addrCity</td>
</tr>
<tr>
<td>State/Province</td>
<td>State</td>
<td>addrState</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>Zip Code</td>
<td>addrPostcode</td>
</tr>
<tr>
<td>Country/Region</td>
<td>Country</td>
<td>addrCountry</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Default Address</td>
<td>Check box Sage CRM to Exchange sync only. When a contact is synchronized from Sage CRM to Exchange, the Exchange address that's associated with the default Sage CRM address is set as the Mailing Address.</td>
</tr>
<tr>
<td>(Phone numbers) Business</td>
<td>Phone / Business</td>
<td>Split across phon_countrycode, phon_areacode, phon_number, where the phon_type = Business.</td>
</tr>
<tr>
<td>Business Fax</td>
<td>Phone / Fax</td>
<td>Split across phon_countrycode, phon_areacode, phon_number, where the phon_type = Fax.</td>
</tr>
</tbody>
</table>
Setting up Exchange Integration

- Deploying the Sync Engine on a remote server
- Deploying the Sync Engine in multi-server environment
- Configuring Exchange Server
- Creating a connection to Exchange Server

Deploying the Sync Engine on a remote server

You can deploy the Sync Engine on a different machine to the Sage CRM server.

1. Correctly download and install a compatible version of Tomcat on the remote server. Sage CRM 2017 R1 uses Apache Tomcat 7.0.68 Server.
2. Stop the Tomcat Service on the Sage CRM server.
3. Move the [Install Name]ExchangeSyncEngine folder and [Install Name]ExchangeSyncEngine.war file from the Sage CRM server to Tomcat on the remote server. For example, from \Program Files\Sage\CRM\[Install Name]\tomcat\webapps\ to \sync_engine_machine..\<tomcat install location>\webapps.
4. Start the Tomcat service on the Sage CRM server.
5. Go to webapps\[Install Name] on the remote server.
   - Check that ExchangeSyncEngine\WEB-INF\jdbc.properties contains valid parameters for connection to the database.
   - Check that ExchangeSyncEngine\WEB-INF\syncengine.properties contains valid parameters for a connection to the Sage CRM endpoint. For example:  

```javascript
syncengine.configurationurl=http://2K8X64CRMX86001/sdata/crmj
```
6. Restart the Tomcat service on the remote server. A restart is required because properties have been changed.
7. Install the rewriter module so Sage CRM can access the CRMRewriter.

   - Copy the CRMRewriter folder from the Sage CRM server (.\Program Files\Sage\CRM\Services\IISUtils) to the remote server.
   - On the remote server, add an SData application to IIS, which points to the CRMRewriter folder.
   - In the CRM.Rewriter.rules file, remove all lines except the line containing: RewriteRule ^(/sdata/test.html)/sdata/Default.aspx?r=$1 [R,NC] and for example, RewriteRule ^/sdata/[install name]ExchangeSyncEngine/(.*)$ http://[remote server name]:10009/[install name]ExchangeSyncEngine/$1?%{QUERY_STRING} [P].
   - Restart IIS and check that the rewriter module works. For example, the following URL should return an unauthorized access page: http://localhost/sdata/[install name]ExchangeSyncEngine/$service/status.

8. Check that the Sync Engine is visible from the Sage CRM server. For example, the following URL should return an unauthorized access page: http://<sync engine host name>/sdata/<appname>ExchangeSyncEngine/$service/status.

9. Create a connection to Exchange Server using the Sync Engine deployed on the remote server. These steps are described in Creating a connection to Exchange Server.

Deploying the Sync Engine in multi-server environment

A multi-server environment is a Sage CRM configuration with more than one Sage CRM server. Users are load balanced onto different Sage CRM servers based on rules defined in a hardware or software load balancer.

In this type of environment, it’s important that the Sync Engine runs on only one of the Sage CRM servers. If there are multiple Sage CRM servers, with an individual exchange Sync Engine deployed on each, there would be issues with conflicting Exchange synchronization resources and there could also be performance issues if each Sync Engine tried to perform a synchronization every few minutes.

In multi-server environments, you should install only one Sync Engine instance on the primary server in a group. To ensure that installing subsequent servers won’t break the existing Exchange synchronization, do the following.

1. Disable the integration from the Sage CRM UI on the first server.
2. Install the next node.
3. Remove the Replication Engine from the new node.
   - Stop <installname>Tomcat7 Windows service.
   - Remove c:\Program Files (x86)\Sage\CRM\<installname>\tomcat\webapps\<installname>ExchangeSyncEngine.war and c:\Program Files
(x86)\Sage\CRM\crm\tomcat\webapps\<installname>ExchangeSyncEngine folder.

- Start <installname>Tomcat7 Windows service.

4. Enable integration on the first node.

**Configuring Exchange Server**

**Note:** Ensure the user’s Sage CRM email address matches the impersonated user’s primary SMTP address in Exchange. Also ensure the user is included in the global address list in Exchange.

You must prepare Exchange Server to ensure Sage CRM Exchange Integration works correctly.

1. Complete the prerequisites to configure Exchange Impersonation. For more information, see the latest articles on [msdn.microsoft.com](http://msdn.microsoft.com).
   - Enable Client Access Server (CAS) on Exchange Server. This performs several functions including exposing the EWS virtual directory.
   - Set up domain administrator credentials, or other credentials with the permission to create and assign roles and scopes.
   - Install Remote PowerShell on the computer from which you run commands.

2. Set up an Exchange impersonated user mailbox to access the mailboxes of other Exchange users if you have not already done so.

3. Run cmdlets in the Exchange Management Shell. This applies the ApplicationImpersonation role to the Exchange impersonation user so that it can access other mailboxes.

```
New-ManagementRoleAssignment -Name:<any name> –
Role:ApplicationImpersonation –User:<impersonation user name here>
```

Alternatively, to manually enable a user for impersonation using EAC, add the ApplicationImpersonation admin role in permissions and add the mailbox used for impersonation to this role.

If you’re using Office 365 Online, you must explicitly give the impersonated user application impersonation rights in the Office 365 Exchange Admin Centre or via PowerShell commands.

4. Using Outlook Web Access, log on as the impersonation user to initialize the account.

5. Click **Servers | Virtual directories | EWS | Authentication** and enable Basic authentication in the Exchange Administration Center (EAC). Basic authentication is how Sage CRM authenticates with EWS. On its own, Basic authentication is not a secure authentication method so we recommend that you use Secure Sockets Layer (HTTPS) for the connection between Sage CRM and Exchange to secure the connection.

**Warning:** If your Exchange hosting provider does not support Basic authentication on the EWS virtual directory and supports Windows authentication only, you cannot configure Exchange Integration because Sage CRM does not support Windows authentication.
Creating a connection to Exchange Server

You must create a connection from Sage CRM to the Sync Engine and from the Sync Engine to Exchange Server.

1. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Connection Management.
2. Click New.
3. Complete the Exchange Server connection fields.
   a. Enter a value in Exchange Web Service URL, Exchange Server User Name, Domain, and Password for an Exchange Server impersonation user.
   b. Enter a value in CRM User Name for the Sage CRM user with full administrator rights who is used to communicate between Sage CRM and the Sync Engine.
   c. To deploy the Sync Engine remotely, choose No in Use Default Sync Engine Location and select the checkboxes. For more information, see Deploying the Sync Engine on a remote server.
4. Click Save.
5. Click Continue. The Exchange Server Connection and User Mailbox Management tabs are displayed.
6. Select the user mailboxes that you want to enable for synchronization and review the synchronization options. For more information, see Enabling user mailboxes for synchronization and Synchronization management fields.

Exchange Server connection fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange Web Service URL</td>
<td>Exchange Web Services (EWS) URL of Exchange Server. Http and Https are supported. For example, <a href="https://myserver/ews/exchange.asmx">https://myserver/ews/exchange.asmx</a> You must enter the the correct EWS endpoint, and not the link to the EWS WSDL definition file. To use Office 365, enter <a href="https://outlook.office365.com/EWS/Exchange.asmx">https://outlook.office365.com/EWS/Exchange.asmx</a> Note: Use this tool to test your EWS connection: <a href="https://testconnectivity.microsoft.com">https://testconnectivity.microsoft.com</a></td>
</tr>
<tr>
<td>Exchange Server User Name</td>
<td>User name of a Windows Exchange Server mailbox that has access to the mailboxes at the EWS endpoint that you want to synchronize with. This is Exchange Server exposed by the EWS API.</td>
</tr>
<tr>
<td>Domain</td>
<td>Windows domain of the Exchange Server account specified in Exchange Server User Name.</td>
</tr>
<tr>
<td>Password</td>
<td>Password of the Exchange Server account specified in Exchange Server User Name.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CRM User Name</td>
<td>User name of the Sage CRM user with full Administrator rights that’s used to communicate between Sage CRM and the Sync Engine.</td>
</tr>
<tr>
<td>Use Default Sync Engine Location</td>
<td>When the connection is saved and established, the Sync Engine is deployed by default in the Program Files\ Sage\CRM[install name]\Tomcat\Webapps directory of the Sage CRM installation. To deploy the Sync Engine in an alternative location, set this field to <strong>No</strong>. For more information, see <a href="#">Deploying the Sync Engine on a remote server</a>. If you change the default port for Sage CRM on IIS to any port other than port 80, and want to set up Exchange Integration, you must set this field to <strong>No</strong> and enter the server name and port number separated by a colon(;) in <strong>Sync Engine Location</strong>.</td>
</tr>
<tr>
<td>Sync Engine Location</td>
<td>The SData URL of the remotely deployed server. This field is displayed only if you set <strong>Use Default Sync Engine Location</strong> to <strong>No</strong>.</td>
</tr>
<tr>
<td>Outlook Plugin Version</td>
<td>A read-only field that displays the version of the Lite Outlook Plugin used with Exchange Integration.</td>
</tr>
<tr>
<td>Allow Users to Manually Install Plugin</td>
<td>Choose <strong>Yes</strong> to display the <strong>Install Lite Outlook Integration</strong> button in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Allow Non-Organizers to Edit Linked Organizer Appointments</td>
<td>Choose <strong>Yes</strong> to allow users with the appropriate security/territory rights to edit appointments in Sage CRM which are linked to appointments in the organizer mailbox. Choose <strong>No</strong> to allow only the (Exchange) organizer of the appointment to edit the appointment in Sage CRM.</td>
</tr>
<tr>
<td>Logging Level</td>
<td>Choose <strong>Full logging</strong> to write all errors, skipped items, conflicts, and all other logging regarding the synchronization to the log files. Log files are saved in: <code>..\Program Files\Sage\CRM\[Install Name]\Logs\Exchange Integration</code>. You can view log files in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Send updates to past appointments</td>
<td>Choose <strong>Yes</strong> to send an update to all attendees of a meeting that occurred in the past whenever a user makes a change to the meeting information.</td>
</tr>
</tbody>
</table>
Synchronizing Exchange and Sage CRM

- Enabling user mailboxes for synchronization
- Setting Exchange synchronization options
- Enabling Exchange Integration
- Enabling Exchange synchronization
- Staggering the initial synchronization
- Working with synchronization errors
- Working with Exchange Integration logs
- Viewing synchronization statistics

Enabling user mailboxes for synchronization

You must select the Sage CRM user mailboxes that you want to synchronize with Exchange. Exchange Integration does not support synchronization with public mailboxes or with mailboxes that have been exposed to an Exchange Server through Federation Trust.

**Note:** Exchange Integration does not use users' licenses when carrying out a synchronization, so the number of users enabled for the integration can be greater than the number of concurrent licenses.

1. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Connection Management.
2. Click the User Mailbox Management tab. A list of all Sage CRM users (excluding Disabled, Deleted, Resource users, or any users without an email address) is displayed.
3. Click Change. This button is displayed only if the synchronization process is disabled.
4. Select the Synchronize checkbox beside the user mailboxes that you want to synchronize with Exchange. We strongly recommend that you enable all Sage CRM users for Exchange synchronization to ensure a seamless integration. Synchronization does not occur until the synchronization is enabled.
5. Click Save. The Sync Engine checks the connection to the user mailboxes through the impersonation user.

   - Where a connection to a mailbox is successful, an Enabled icon is displayed in the Synchronization column.
   - Where a connection to a mailbox is unsuccessful, a Failed icon is displayed in the Synchronization column.
   - If two email addresses in Sage CRM map to one primary email address in Exchange, the first connection is successful but the second connection is successful. See the log files for more information about failed connections.
Setting Exchange synchronization options

The rules that are used to synchronize data between Sage CRM and Exchange are based on the default Exchange synchronization management settings where appointments, tasks, and linked contacts are synchronized in both directions during Exchange Integration. You can change the values of these settings to suit your particular business requirements.

1. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Synchronization Management.
2. If the connection is currently enabled, click Disable. The Connection Status must be disabled to make changes to Exchange synchronization options.
3. Click Change.
4. Change the values in the Synchronization management fields.
5. Click Save.

Synchronization management fields

All Synchronization Management fields are global and apply to all mailboxes involved in the synchronization. All fields on the Status panel are read-only.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange Web Service URL</td>
<td>Exchange Web Services URL that was specified when setting up the connection to Exchange Server.</td>
</tr>
<tr>
<td>Connection Status</td>
<td>Disabled when a connection is first set up or if the connection has been temporarily disabled. For example, when you are enabling additional user mailboxes for synchronization.</td>
</tr>
<tr>
<td>Current Sync State</td>
<td>Blank when the connection is disabled. In Progress when the synchronization is enabled and in progress. Waiting to Sync when the synchronization is enabled but not currently in progress. For example, a synchronization has just finished and another is due in five minutes.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Last Sync Status</td>
<td>The status of the most recent synchronization.</td>
</tr>
<tr>
<td></td>
<td><strong>Blank</strong> when the connection was never enabled or a synchronization is in progress.</td>
</tr>
<tr>
<td></td>
<td><strong>Success</strong> when no errors were encountered during the last synchronization.</td>
</tr>
<tr>
<td></td>
<td><strong>Fail</strong> when the number of standard errors during the last synchronization was greater than the value in <strong>Max Errors Allowed</strong> or a fatal error occurred.</td>
</tr>
<tr>
<td></td>
<td><strong>Success with Errors</strong> when the number of standard errors in the last synchronization was less than or equal to the value in <strong>Max Errors Allowed</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Interrupted</strong> when you disabled the synchronization process while it was in progress.</td>
</tr>
<tr>
<td>Last Sync Time</td>
<td>Date and time that the most recent synchronization started.</td>
</tr>
<tr>
<td>Next Sync Time</td>
<td>Date and time of the next scheduled synchronization. This is the time that the last synchronization finished + the synchronization interval (minutes).</td>
</tr>
<tr>
<td>Errors in Last Sync</td>
<td>The number of errors in the last synchronization.</td>
</tr>
<tr>
<td>Conflicts in Last Sync</td>
<td>The number of conflicts in the last synchronization. This is not dependent on the selected logging level.</td>
</tr>
<tr>
<td>Skipped Items in Last Sync</td>
<td>The number of skipped items in the last synchronization. This is not dependent on the selected logging level.</td>
</tr>
<tr>
<td>Sync Appointments</td>
<td>Choose <strong>Yes</strong> to synchronize appointments in the direction defined in <strong>Appointment Sync Direction</strong>.</td>
</tr>
<tr>
<td></td>
<td>For information about fields that are synchronized, see <strong>Appointment field mappings</strong>.</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>No</strong> to never synchronize appointments.</td>
</tr>
<tr>
<td>Sync Tasks</td>
<td>Choose <strong>Yes</strong> to synchronize tasks in the direction defined in <strong>Task Sync Direction</strong>.</td>
</tr>
<tr>
<td></td>
<td>For information about fields that are synchronized, see <strong>Synchronizing tasks</strong>.</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>No</strong> to never synchronize tasks.</td>
</tr>
<tr>
<td>Sync Contacts</td>
<td>Choose <strong>Yes</strong> to synchronize contacts in the direction defined in <strong>Contact Sync Direction</strong>.</td>
</tr>
<tr>
<td></td>
<td>For information about fields that are synchronized, see <strong>Synchronizing contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>No</strong> to never synchronize contacts.</td>
</tr>
<tr>
<td>Appointment Sync Direction</td>
<td>This field is disabled if <strong>Sync Appointments</strong> is set to <strong>No</strong>.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Task Sync Direction</td>
<td>This field is disabled if <strong>Sync Tasks</strong> is set to <strong>No</strong>.</td>
</tr>
<tr>
<td>Contact Sync Direction</td>
<td>This field is disabled if <strong>Sync Contacts</strong> is set to <strong>No</strong>. There is no Exchange to CRM Only option because unlinked Exchange contacts are never synched to Sage CRM.</td>
</tr>
<tr>
<td>Appointment Conflicts</td>
<td>Determines which version is used when there’s a duplicate or conflict on an appointment record. This field is disabled if <strong>Appointment Sync Direction</strong> is set to one-way (either Exchange to CRM Only or CRM to Exchange Only) or <strong>Sync Appointments</strong> is set to <strong>No</strong>.</td>
</tr>
<tr>
<td>Task Conflicts</td>
<td>Determines which version is used when there’s a duplicate or conflict on a task record. This field is disabled if <strong>Task Sync Direction</strong> is set to one-way (either Exchange to CRM Only or CRM to Exchange Only) or <strong>Sync Tasks</strong> is set to <strong>No</strong>.</td>
</tr>
<tr>
<td>Contact Conflicts</td>
<td>Determines which version is used when there’s a duplicate or conflict on a contact record. This field is disabled if <strong>Contact Sync Direction</strong> is set to one-way (CRM to Exchange Only), or <strong>Sync Contacts</strong> is set to <strong>No</strong>.</td>
</tr>
<tr>
<td>Archived Appointment Policy (days)</td>
<td>Appointments deleted in Exchange, either deliberately or as a result of archiving, are received by Sage CRM as delete requests. It is not desirable to automatically delete the appointments in Sage CRM just because they are archived by Exchange so this field enables you to set an archived appointment policy. The default value is 180. Using the default value, if a delete request comes from Exchange on an appointment where the End Date is 180 days or older, the appointment is not deleted, but the link to Exchange is deleted. If the appointment is deleted in Exchange and the End Date is within 180 days, the appointment is deleted in Sage CRM. You can enter zero and blank values, but we don't recommend that you use these. Using zero, if a delete request comes from Exchange on any appointment regardless of its age, the appointment is not deleted, but the link to Exchange is deleted. Using <strong>blank</strong>, if a delete request comes from Exchange on any appointment regardless of its age, the appointment is deleted. This field is disabled if <strong>Appointment Sync Direction</strong> is set to <strong>CRM to Exchange Only</strong>.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Archived Recurring Appointment Policy (days)</td>
<td>The default value is 180. Using the default value, if a delete request comes from Exchange on a series of appointments where the End Date of the last occurrence in the series is 180 days or older, the series is not deleted, but the link to Exchange is deleted. If the series of appointments is deleted in Exchange and the End Date of the last occurrence in the series is within 180 days, the series is deleted in Sage CRM. You can enter zero and blank values, but we don't recommend that you use these. Using zero, if a delete request comes from Exchange on a series of appointments regardless of its age, the series is not deleted, but the link to Exchange is deleted. Using <strong>blank</strong>, if a delete request comes from Exchange on a series of appointments regardless of its age, the series is deleted. This field is disabled if Appointment Sync Direction is set to <strong>CRM to Exchange Only</strong>.</td>
</tr>
<tr>
<td>Archived Task Policy (days)</td>
<td>The default value is 180. Using the default value, if a delete request comes from Exchange on a task where the Last Modified Date is 180 days or older, the task is not deleted, but the link to Exchange is deleted. If the task is deleted in Exchange and the Last Modified Date is within 180 days, the task is deleted in Sage CRM. You can enter zero and blank values, but we don't recommend that you use these. Using zero, if a delete request comes from Exchange on any task regardless of its age, the task is not deleted, but the link to Exchange is deleted. Using <strong>blank</strong>, if a delete request comes from Exchange on any task regardless of its age, the task is deleted. This field is disabled if Task Sync Direction is set to <strong>CRM to Exchange Only</strong>.</td>
</tr>
<tr>
<td>Sync Interval (minutes)</td>
<td>Number of minutes between the end of the last synchronization and the start of the next synchronization. The default value is 5. Set this field to zero to start the next synchronization as soon as the last synchronization ends.</td>
</tr>
<tr>
<td>Response Timeout (seconds)</td>
<td>Number of seconds that Sage CRM waits for a response from the Exchange Web Services endpoint or the Sync Engine before returning a fatal error. The default value is 300. If timeouts occur for the first synchronization, increase this value for the first synchronization and then decrease the value. If subsequent synchronizations result in timeouts, increase this value for normal operation to suit your environment.</td>
</tr>
<tr>
<td>Max Errors Allowed</td>
<td>Number of standard errors allowed before the synchronization fails. The default value is 100.</td>
</tr>
</tbody>
</table>
Include CRM Info in Body | Choose Yes to display the top content (related company and person) of an appointment in the appointment body in Exchange. You can customize the top content that’s included in the body in <My Profile> | Administration | Translations (caption code OTL_AppointmentDetails, OTL_TaskDetails).
The setting does not apply to tasks because top content is always included in tasks.
Choose No to allow a user to edit the Regarding panel fields on a Communication record.
This field is disabled if Sync Appointments is set to No.

Expand Distribution Lists | Choose Yes to synchronize a meeting invitation or appointment scheduled for a distribution list in Exchange to Sage CRM as an appointment for each member of the list.

Enabling Exchange Integration

When you’ve enabled Exchange Integration, you should avoid disabling it and re-enabling Classic Outlook Integration. If you must disable Exchange Integration, you should do so under guidance from a Sage CRM support professional only.

1. Click <My Profile> | Administration | System | System Behavior.
2. Click Change.
3. Choose Yes from Use Exchange Server Integration.
4. Click Save.

When Exchange Integration is enabled, several things happen in Sage CRM.

- The Exchange Server Integration menu option is displayed in <My Profile> | Administration | Email and Documents.
- The Synchronize with Exchange Server checkbox and Show Exchange Server Integration Logs field are displayed in <My Profile> | Administration | Users | Users | <user>. For more information, see User fields.
- Classic Outlook Integration fields are no longer displayed in <My Profile> | Administration | Users | User Configuration. For more information, see User Configuration Settings fields.
- The Install / Re-install Classic Outlook Integration button and Full Menu In Outlook field are no longer displayed in <My Profile> | Preferences.
- Users can no longer work with Classic Outlook Integration.
- Records linked to Outlook clients through Classic Outlook Integration are no longer synchronized.

Enabling Exchange synchronization

Only default calendar, task list and contacts folders are synchronized. Sub-folders aren’t synchronized so you should save any data that you don’t want to synchronize with Sage CRM in sub-folders.
1. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Synchronization Management.
2. Click Enable. The synchronization status changes to In Progress.

When the synchronization has completed, the synchronization status changes to Waiting before the next sync is due.

**Staggering the initial synchronization**

If you have large volumes of data and user mailboxes, you could consider a staggered approach to the initial synchronization. This example describes a staggered approach to the initial synchronization of 210 user mailboxes, 30 mailboxes at a time.

1. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Connection Management | User Mailbox Management and flag users 1-30 to synchronize.
2. Click <My Profile> | Administration | Email and Documents | Exchange Server Integration | Synchronization Management and trigger an initial synchronization for these 30 users only. When the initial synchronization for these users is finished, disable the synchronization.
3. Flag users 31 – 60 to synchronize and re-enable the synchronization. This triggers an initial synchronization for users 31 – 60 and a subsequent synchronization for users 1 – 30.
4. When this synchronization is finished, disable the synchronization.
5. Flag users 61 – 90 to synchronize and re-enable the synchronization. This triggers an initial synchronization for users 61 – 90 and a subsequent synchronization for users 1 – 60.
6. When this synchronization is finished, disable the synchronization.

**Working with synchronization errors**

You should monitor the synchronization to ensure there are no errors:

- Use HTTP Debugger to capture synchronization traffic.
- View the synchronization status page. For more information, see Viewing synchronization statistics.
- Monitor the log files. For more information, see Working with Exchange Integration logs.

**Types of error**

Sage CRM handles the following scenarios as standard errors. They are logged according to the specified logging level

- **Data Sync Error.** Data is synchronized from Exchange to Sage CRM or Sage CRM to Exchange, but Sage CRM or Exchange cannot process the create/update/delete for a contact/task/appointment. For example, because non-numeric characters have been synchronized to an Integer field. Each failed create/update/delete from either Sage CRM or Exchange is added to the overall error count for a specific synchronization.
- **Cannot Connect to Mailbox.** During the course of a synchronization, Sage CRM cannot connect to a specific Exchange mailbox that has been flagged to synchronize with Sage CRM. The Sage
CRM user mailbox is flagged with a red X in the User Mailbox Management list and the Last Sync column displays the last time a synchronization was successfully started for the user. Sage CRM doesn't attempt to reconnect to the mailbox during the current synchronization. It does attempt to connect during the next synchronization.

Sage CRM handles the following scenarios as fatal errors and stops all activity for the current synchronization. Fatal errors are logged according to the specified logging level and synchronization is attempted at the next scheduled synchronization time.

- No response from EWS endpoint or Sync Engine within the time specified in Response Timeout.
- Sage CRM cannot connect with the EWS URL. For example, due to an authentication problem.
- Sage CRM is connected to Exchange Server but not to any of the flagged mailboxes.
- Sage CRM cannot connect to the Sync Engine or vice versa.

Troubleshooting steps

When trying to identify the cause of an error, do the following:

- Establish if the error occurs on all mailboxes, or only certain mailboxes. To do this, disable all users except the problem user, and test with specific synchronization types.
- Investigate if the error occurs during a specific type of synchronization. For example, when synchronizing contacts from Sage CRM to Exchange, or when synchronizing tasks from Exchange to Sage CRM. If it occurs when synchronizing from Exchange to Sage CRM, check the SCRM and Exchange Sync Engine logs. If it occurs when synchronizing from Sage CRM to Exchange, check the CXF and Exchange Sync Engine logs.
- Investigate if the synchronization causes the Exchange Sync Engine to stop responding. Check the Tomcat service logs for a crash.
- Check all relevant logs. An issue with data synchronization is not necessarily a fault in the Sync Engine. Errors reported by the Sync Engine could be caused by errors on one of the endpoints.

Working with Exchange Integration logs

You can view Exchange Integration logs in `<My Profile> | Administration | Email and Documents | Exchange Server Integration | Logging`. You can view log files for each user (User logs) or for all user mailboxes and the whole configuration (Generic logs).

You can also view the logs from the Sage CRM installation in `..\Program Files\Sage\CRM\[install name]\Logs\Exchange Integration`.

Users with rights to view their own log files can view them in `My CRM | Exchange Integration Logs`.

Setting logging levels

You set the logging level for the logs in the table below in `<My Profile> | Administration | Email and Documents | Exchange Server Integration | Connection Management`. For more information, see Exchange Server connection fields.
<table>
<thead>
<tr>
<th>Log File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User folder</td>
<td>Logs activity information and skipped items on individual mailboxes and errors that occur on a single mailbox.</td>
</tr>
<tr>
<td>Generic folder</td>
<td>Logs errors and activity not associated with a specific mailbox. The <code>exchangeConfiguration</code> log is most likely to contain errors the occur on a webapp level.</td>
</tr>
<tr>
<td>Exchange Configuration Log</td>
<td>Contains all activity on the configuration of the Exchange Integration for any given day including connecting to the Sync Engine, connecting to the EWS endpoint, and connecting to specific mailboxes. The file name for this log is <code>[date]ExchangeConfigurationLog.log</code>.</td>
</tr>
<tr>
<td>Exchange Conflicts</td>
<td>Contains all conflicts for the Exchange Integration for any given day, for all mailboxes involved in a synchronization that day. The file name for this log is <code>[date]ExchangeConflictLog.log</code>. Also available as a user log, <code>User Conflicts [date][username]_ConflictLog.log</code>.</td>
</tr>
<tr>
<td>Skipped Items - CRM to Exchange</td>
<td>Contains all skipped items when synchronizing from Sage CRM to Exchange for the Exchange Integration for any given day, for all mailboxes involved in a synchronization that day. The file name for this log is <code>[date]SkippedItemsCRMToExchange.log</code>. Also available as a user log, <code>User Skipped Items - [date][username]_SkippedItemsCRMToExchange.log</code>.</td>
</tr>
<tr>
<td>Skipped Items - Exchange to CRM</td>
<td>Contains all skipped items when synchronizing from Exchange to Sage CRM for the Exchange Integration for any given day, for all mailboxes involved in a synchronization that day. The file name for this log is <code>[date]SkippedItemsExchangeToCRM.log</code>. Also available as a user log, <code>User Skipped Items - [date][username]_SkippedItemsExchangeToCRM.log</code>.</td>
</tr>
<tr>
<td>Sync Activity - CRM to Exchange</td>
<td>Contains all sync activity and sync-related errors for any given day for all mailboxes involved when synchronizing from Sage CRM to Exchange. The file name for this log is <code>[date]SyncActivityCRMToExchange.log</code>. Also available as a user log <code>[date][username]_SyncActivityCRMToExchange.log</code>.</td>
</tr>
<tr>
<td>Sync Activity - Exchange to CRM</td>
<td>Contains all synchronization activity and synchronization-related errors for any given day for all mailboxes involved when synchronizing from Exchange to Sage CRM. The file name for this log is <code>[date]SyncActivityExchangeToCRM.log</code>. Also available as a user log <code>[date][username]_SyncActivityExchangeToCRM.log</code>.</td>
</tr>
</tbody>
</table>

You set the logging level for the logs in the table below in the `log4j.properties` file in the `exchangesyncengine webapp WEB-INF` folder.
<table>
<thead>
<tr>
<th>Log File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchangesynchronisation - log4j.properties file</td>
<td>High level activity log that displays the number of records to be processed. In general, it indicates if an error response is retrieved from EWS or CRMJ.</td>
</tr>
<tr>
<td>Exchangesyncengine</td>
<td>Logs activity (including GETs and POSTs), HTTP error codes if received, and stack traces.</td>
</tr>
<tr>
<td>Exchangesyncdefault</td>
<td>Logs all synchronization activity. This displays everything that occurs in sequence.</td>
</tr>
<tr>
<td>Exchangesynch</td>
<td>Logs errors that occur on individual synchronization items going to CRMJ or EWS.</td>
</tr>
<tr>
<td>Exchangesyncenginestacktrace</td>
<td>Logs stack traces caused by exceptions. This is a useful starting point.</td>
</tr>
</tbody>
</table>

**Log File**

Don’t enable DEBUG logging on any webapp until you've identified the general area where the problem is occurring.

- If you’re unsure which area is causing the error, archive logs and generate a new set of standard logs.
- If you believe an error is returned by Exchange, or the error is caused by data sent to Exchange, enable the general, inbound, and outbound CXF logs.
- If you believe the error is occurring in the CRMJ webapp, examine the CRMJ log files.

**Viewing synchronization statistics**

Open a web browser and navigate to

The following information about the Exchange Integration synchronization is displayed:

- Synch Engine Status
  - Heatbeat date
- Synchronization Statistics
  - Source Endpoint
  - Target Endpoint
  - Resource
  - Sync Digest Time
  - Sync Source Time
  - Sync Target Time
Classic Outlook Integration

- About Classic Outlook Integration
- Setting up Classic Outlook Integration
- Mapping data between Outlook and Sage CRM

About Classic Outlook Integration

Classic Outlook Integration files emails, and synchronizes contacts, appointments, and tasks between Sage CRM and Microsoft Outlook. It lets users file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. Sage CRM Classic Outlook Integration supports email accounts running on Microsoft Exchange Server MAPI or POP3. Roaming Profiles are not supported.

The first synchronization synchronizes:

- Recurring appointments.
- Appointments which have been modified in the last 14 days.
- Appointments with an end date between the last 14 days and today.
- Tasks which have been modified in the last 14 days.
- Tasks with a status of Pending or In Progress.
- Any flagged Sage CRM contacts, or contacts that have been added to the Contacts tab in Outlook.

Subsequent synchronizations synchronize:
- Appointments modified since the last synchronization.
- Tasks modified since the last synchronization.
- Any new, updated, or deleted flagged Sage CRM contacts, or any new, updated, or deleted contacts on the Contacts tab in Outlook. If a synchronized Sage CRM contact shares an address with another person or company, and you change the address in Outlook, Sage CRM updates the shared address with the new information during Contact synchronization.

**How to enable Classic Outlook Integration**

In order to use Classic Outlook Integration, a user must download and install a plugin on the client machine. The plugin works on a 32-bit machine only. As a system administrator, you can display or hide the button that allows users to install the plugin.

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify Sage CRM time zone settings. Incorrect time zone settings can prevent Sage CRM contacts synching to Outlook.</td>
<td>Setting the time zone</td>
</tr>
<tr>
<td>Display the <strong>Install Classic Outlook Integration</strong> button for a specific user.</td>
<td>Configuring Classic Outlook Integration</td>
</tr>
<tr>
<td>If you’re using Sage CRM over HTTPS, or you’re using a non-standard port, you might need to change the default port used by the Classic Outlook Plugin installer.</td>
<td>Changing Classic Outlook Plugin port</td>
</tr>
</tbody>
</table>

**How to set up synchronization**

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the direction in which data is synchronized between Outlook and Sage CRM.</td>
<td>Configuring Classic Outlook Integration</td>
</tr>
<tr>
<td>Enable synchronization of contacts, appointments, and tasks.</td>
<td>Configuring Classic Outlook Integration</td>
</tr>
<tr>
<td>Prevent synchronization to Outlook for specific Sage CRM records if necessary.</td>
<td>Preventing synchronization to Outlook</td>
</tr>
</tbody>
</table>
Task | Help
---|---
Decide what happens to appointments, tasks, and contacts in Sage CRM when they're deleted in Outlook. | Configuring Classic Outlook Integration
Specify how to manage synchronization conflicts. | Configuring Classic Outlook Integration
Configure how often automatic synchronization occurs. | Configuring Classic Outlook Integration
Enable logging for Classic Outlook Integration so users can view and resolve synchronization errors. | Enabling logging for Classic Outlook Integration

How data is mapped between Sage CRM and Outlook

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review how contacts are mapped between Sage CRM and Outlook and change the mappings if necessary.</td>
<td>Contact data mappings</td>
</tr>
<tr>
<td>You can use data upload to import a large number of contacts from Outlook to Sage CRM.</td>
<td>Uploading Outlook Contacts to Sage CRM</td>
</tr>
<tr>
<td>Review how appointments are mapped between Sage CRM and Outlook and change the mappings if necessary.</td>
<td>Appointment data mappings</td>
</tr>
<tr>
<td>Review how tasks are mapped between Sage CRM and Outlook and change the mappings if necessary.</td>
<td>Task data mappings</td>
</tr>
<tr>
<td>Review how tasks statuses are mapped between Sage CRM and Outlook and change the mappings if necessary.</td>
<td>Task status mappings</td>
</tr>
<tr>
<td>You can customize the details that are added to tasks and appointments sent from Sage CRM to Outlook.</td>
<td>Customizing task and appointment details</td>
</tr>
</tbody>
</table>

Classic Outlook Integration licenses

The Classic Outlook Plugin uses Sage CRM concurrent licenses as follows:

- If a user is filing emails or adding contacts in Outlook using the plugin, one seat of a concurrent license is used.
- If a user is filing emails or adding contacts in Outlook using the plugin, and is also logged on to Sage CRM using a browser, one seat of a concurrent license is used.
- If a user is filing emails or adding contacts in Outlook using the plugin, and a second user is logged on to Sage CRM using a browser, two seats of a concurrent license are used.
- The license is freed up when Outlook closes or the Sage CRM session expires. Where a user is using the plugin in Outlook and using Sage CRM in a browser, the license is freed only when both Outlook
and the Sage CRM session close. The license is not freed when the user action (synching, or filing an email) completes.
Setting up Classic Outlook Integration

- Setting the time zone
- Configuring Classic Outlook Integration
- Changing Classic Outlook Plugin port
- Translating Classic Outlook Integration messages
- Preventing synchronization to Outlook
- Enabling logging for Classic Outlook Integration

Setting the time zone

It's important that the Sage CRM time zone settings are set correctly. Incorrect time zone settings can prevent Sage CRM contacts synching to Outlook unless a Sync Info Reset is performed in the Classic Outlook plugin.

1. Click <My Profile> | Administration | System | System Behavior and set the value of Server time zone to the time zone set in Date and Time in the Windows Control Panel on the CRM server.
2. Click <My Profile> | Administration | Users | <user> | Users Preferences and set the value of Time Zone to the time zone set in Date and Time in the Windows Control Panel on the user's machine. This may be different for users in different office locations, or for users who are accessing Sage CRM while traveling. Alternatively, the user can set the value in <My Profile> | Preferences | Time Zone.

Configuring Classic Outlook Integration

The recommended setting when using IIS Auto Login is to disable IIS Anonymous Authentication on the CRM web server. Classic Outlook Integration doesn't work when Anonymous Authentication is disabled. For a workaround, see Using Classic Outlook Integration with Auto Login in the Troubleshooting Help.

1. Click <My Profile> | Administration | Users | User Configuration.
2. Click Change and update the Classic Outlook Integration settings.
3. To display the Install Classic Outlook Integration button that lets users download and install the Classic Outlook Plugin, set Outlook Integration Options to Classic Outlook Integration or Both.
4. Click Save.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outlook Plugin Version</td>
<td>Specifies the Classic Outlook Plugin version. Use this field to manually update the Outlook Plugin version after installing an Outlook Plugin patch.</td>
</tr>
<tr>
<td>Outlook Integration Options</td>
<td>- <strong>Classic Outlook Integration.</strong> Displays a button that lets the user install the Classic Outlook Plugin and use Classic Outlook Integration.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Lite Outlook Integration.</strong> Displays a button that lets the user install the Lite Outlook Plugin and use Lite Outlook Integration. If Exchange Integration is enabled, the Lite Outlook plugin provides additional functionality to the Exchange Integration.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Both.</strong> Displays both the Classic Outlook button and the Lite Outlook button on a 32-bit system. It displays only the Lite Outlook button on a 64-bit system. Only one plugin can be installed.</td>
</tr>
<tr>
<td></td>
<td>- <strong>None.</strong> Prevents the user installing the Classic Outlook Plugin or the Lite Outlook Plugin because no plugin buttons are displayed.</td>
</tr>
<tr>
<td>One Way Synchronization</td>
<td>Specifies the direction in which data is synchronized between Outlook and Sage CRM in Classic Outlook Integration.</td>
</tr>
<tr>
<td></td>
<td>- <strong>No.</strong> Data is synchronized bidirectionally, from Sage CRM to Outlook and from Outlook to Sage CRM.</td>
</tr>
<tr>
<td></td>
<td>- <strong>From Outlook to CRM only.</strong> Data is synchronized from Outlook to Sage CRM only.</td>
</tr>
<tr>
<td></td>
<td>- <strong>From CRM to Outlook only.</strong> Data is synchronized from Sage CRM to Outlook only.</td>
</tr>
<tr>
<td></td>
<td>When you change this value, users must restart their Sage CRM session in Outlook and initiate synchronization for the change to take effect.</td>
</tr>
<tr>
<td>Synchronize Outlook Deletions</td>
<td>Specifies whether to delete appointments, tasks, and contacts in Sage CRM when they're deleted in Outlook. The items are deleted in Sage CRM during Outlook synchronization.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Yes.</strong> Deletes appointments, tasks, and contacts in Sage CRM if the user has rights to delete them.</td>
</tr>
<tr>
<td></td>
<td>- <strong>No.</strong> Leaves appointments, tasks, and contacts intact in Sage CRM.</td>
</tr>
</tbody>
</table>
Managing CRM and Outlook Updates

Specifies how to resolve data conflicts between Outlook and Sage CRM when bidirectional synchronization is enabled (One Way Synchronization is set to No). To view conflicts, use the View Conflict Log in Outlook.

- **Outlook Updates Win.** The changes made to Outlook will appear in both Outlook and Sage CRM. This is the recommended option for organizations that use Outlook as their primary appointment scheduling tool. The default for new installations is Outlook Updates Win.

- **Organizer Updates Win.** This applies to appointments only. This is the recommended option for organizations that mainly rely on Sage CRM for their customer interaction management and have a number of users who use Outlook to organize and update meetings.

  When the appointment organizer (the person who created the appointment in Outlook) initiates synchronization, changes made in Outlook overwrite any conflicting data in Sage CRM.

  When any other user initiates synchronization, changes made in Sage CRM overwrite any conflicting data in Outlook.

- **CRM Updates Win.** Changes made to Sage CRM appear in both Outlook and Sage CRM. This is the recommended option for organizations that use Sage CRM as their primary appointment scheduling tool.

Synchronize Outlook Contacts

Enables or disables the synchronization of contacts between Outlook and Sage CRM.

- **Yes.** Enables the synchronization of contacts.
- **No.** Disables the synchronization of contacts.

Synchronize Outlook Appointments

Enables or disables the synchronization of appointments between Outlook and Sage CRM.

- **Yes.** Enables the synchronization of appointments.
- **No.** Disables the synchronization of appointments.

Synchronize Outlook Tasks

Enables or disables the synchronization of tasks between Outlook and Sage CRM.

- **Yes.** Enables the synchronization of tasks.
- **No.** Disables the synchronization of tasks.

Auto Sync (In Minutes)

Specifies the number of minutes at which automatic synchronization between Outlook and Sage CRM occurs.
Changing Classic Outlook Plugin port

You might need to change the default port used by the Classic Outlook Plugin installer because you’re using Sage CRM over HTTPS, or you’re using a non-standard port. The port number is displayed in the CRM Server connection settings in the plugin install wizard. This value is controlled by the OutlookPort entry on Custom_Sysparams.

1. Open SQL Server Management Studio.
2. To change the default port, run the following SQL query:
   ```sql
   update custom_sysparams set parm_value = '<PortNumber>' where parm_name = N'OutlookPort'
   ```
   In your query, replace `<PortNumber>` with the actual port number you want to use.
3. Perform a metadata refresh and include the system params in the refresh.

Translating Classic Outlook Integration messages

You can translate all Classic Outlook Integration screen text and messages using the OutlookPlugin caption family. For more information, see Translations list. Users must reinstall the Outlook Plugin to see translation changes.

Preventing synchronization to Outlook

You can use the One Way Synchronization option to control synchronization from Sage CRM to Outlook. For more information, see Configuring Classic Outlook Integration.

Alternatively, you can set a flag in the Comm_CRMOnly column in the Communication table to prevent a specific Communication record synchronizing to Outlook. This allows you to use a table script, hidden field, or equivalent to update the column when a communication record is saved and particular criteria are met. For example, you might want to not synch communication records with an action of Phone In. The Comm_CRMOnly flag overrides the value in One Way Synchronization.

1. Open SQL Server Management Studio.
2. Set Comm_CRMOnly to 1.

Enabling logging for Classic Outlook Integration

1. In Windows, click Start and type cmd in the Search field.
2. Type regedit at the command prompt. The registry editor opens.
3. Add the following values to HKLM\SOFTWARE\ACCPAC\CRM\OutlookPlugin:
   - DWORD DebugLevel = 2
   - STRING Debug = 1
Mapping data between Outlook and Sage CRM

- Contact data mappings
- Uploading Outlook Contacts to Sage CRM
- Appointment data mappings
- Task data mappings
- Task status mappings
- Customizing task and appointment details

Contact data mappings

The mappings in the table below are used to synchronize contact data between Outlook and Sage CRM in Classic Outlook Integration.

<table>
<thead>
<tr>
<th>Outlook</th>
<th>Sage CRM (Translation)</th>
<th>Sage CRM (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Salutation</td>
<td>pers_salutation</td>
</tr>
<tr>
<td>First</td>
<td>First Name</td>
<td>pers_firstname</td>
</tr>
<tr>
<td>Middle</td>
<td>Middle</td>
<td>pers_middlename</td>
</tr>
<tr>
<td>Last</td>
<td>Last Name</td>
<td>pers_lastname</td>
</tr>
<tr>
<td>Job Title</td>
<td>Title</td>
<td>pers_title</td>
</tr>
<tr>
<td>Company</td>
<td>Company Name</td>
<td>comp_name</td>
</tr>
</tbody>
</table>

When Outlook information is synchronized with Sage CRM, the company name is deduped before any contact information is added to Sage CRM.

<table>
<thead>
<tr>
<th>Outlook</th>
<th>Sage CRM (Translation)</th>
<th>Sage CRM (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street</td>
<td>Combines Address 1, Address 2, Address 3, and Address 4.</td>
<td>addr_address1 addr_address2 addr_address3 addr_address4</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
<td>addr_city</td>
</tr>
<tr>
<td>State/Province</td>
<td>State</td>
<td>addr_state</td>
</tr>
<tr>
<td>Outlook</td>
<td>Sage CRM (Translation)</td>
<td>Sage CRM (Column)</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>Zip Code</td>
<td>addr_postcode</td>
</tr>
<tr>
<td>Country/Region</td>
<td>Country</td>
<td>addr_country</td>
</tr>
<tr>
<td>Business Phone Country/Region</td>
<td>Business Country</td>
<td>pers_phonecountrycode</td>
</tr>
<tr>
<td>Business Phone City/Area code</td>
<td>Business Area</td>
<td>pers_phonareacode</td>
</tr>
<tr>
<td>Business Phone Local number</td>
<td>[Phone/Email] Business</td>
<td>pers_phonenumber</td>
</tr>
<tr>
<td>Business Fax Country/Region</td>
<td>Fax Country</td>
<td>pers_faxcountrycode</td>
</tr>
<tr>
<td>Business Fax City/Area code</td>
<td>Fax Area</td>
<td>pers_faxareacode</td>
</tr>
<tr>
<td>Business Fax Local number</td>
<td>[Phone/Email] Fax</td>
<td>pers_faxnumber</td>
</tr>
<tr>
<td>Home Phone Country/Region</td>
<td>Home Country</td>
<td>vPhoneHome.Phon_CountryCode</td>
</tr>
<tr>
<td>Home Phone City/Area code</td>
<td>Home Area</td>
<td>vPhoneHome.Phon_AreaCode</td>
</tr>
<tr>
<td>Home Phone Local Number</td>
<td>Home Number</td>
<td>vPhoneHome.Phon_Number</td>
</tr>
<tr>
<td>Mobile Phone Country/Region</td>
<td>Mobile Country</td>
<td>vPhoneMobile.Phon_CountryCode</td>
</tr>
<tr>
<td>Mobile Phone City/Area code</td>
<td>Mobile Area</td>
<td>vPhoneMobile.Phon_AreaCode</td>
</tr>
<tr>
<td>Mobile Phone Local Number</td>
<td>Mobile Number</td>
<td>vPhoneMobile.Phon_Number</td>
</tr>
<tr>
<td>Email</td>
<td>[Phone/Email] Business</td>
<td>pers_emailaddress</td>
</tr>
<tr>
<td>Web page</td>
<td>Website</td>
<td>pers_website</td>
</tr>
<tr>
<td>Department</td>
<td>Department</td>
<td>pers_department</td>
</tr>
<tr>
<td>Categories</td>
<td>[hardcoded in Outlook to CRM Contact. Only updated in Outlook]</td>
<td></td>
</tr>
</tbody>
</table>
Uploading Outlook Contacts to Sage CRM

You can use data upload to import a large number of contacts from Outlook to Sage CRM.

1. Export the contacts from Outlook using the Import and Export wizard in Outlook and save them as an Excel file.
2. In Sage CRM, click <My Profile> | Administration | Data Management | Data Upload.
3. Select Company and click Continue.
4. Click New.
5. Browse to your Outlook contacts MS Excel file.
6. Choose Outlook Data from Select From Existing Mappings. This imports the contacts using predefined Outlook data mappings.
7. Add a description of the data upload.
8. Click Save.
## Appointment data mappings

The mappings in the table below are used to synchronize appointment data between Outlook and Sage CRM in Classic Outlook Integration.

<table>
<thead>
<tr>
<th>Outlook</th>
<th>Sage CRM (Translation)</th>
<th>Sage CRM (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Time</td>
<td>Date/Time</td>
<td>comm_datetime</td>
</tr>
<tr>
<td>End Time</td>
<td>End Time</td>
<td>comm_todatetime</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject</td>
<td>comm_subject</td>
</tr>
<tr>
<td>Location</td>
<td>Location</td>
<td>comm_location</td>
</tr>
<tr>
<td>Body</td>
<td>Details</td>
<td>comm_note</td>
</tr>
<tr>
<td>Status</td>
<td>Status</td>
<td>comm_status</td>
</tr>
<tr>
<td>Importance</td>
<td>Priority</td>
<td>comm_priority</td>
</tr>
<tr>
<td>Organizer</td>
<td>Organizer</td>
<td>comm_organizer or user_emailaddress</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
<td>comp_name</td>
</tr>
<tr>
<td>Person</td>
<td>Person</td>
<td>pers_firstname+pers_lastname (and other columns)</td>
</tr>
<tr>
<td>All Day Event</td>
<td>All Day Event in Outlook becomes an All Day Event in Sage CRM (midnight to 23:59). An All Day Event in Sage CRM (midnight to 23:59) becomes an All Day Event in Outlook.</td>
<td></td>
</tr>
<tr>
<td>Reminder</td>
<td>Reminder</td>
<td>comm_notifydelta</td>
</tr>
<tr>
<td>Attendee</td>
<td>User</td>
<td>user_emailaddress</td>
</tr>
<tr>
<td>% Complete</td>
<td>Percent Complete</td>
<td>comm_percentcomple</td>
</tr>
</tbody>
</table>
Task data mappings

The mappings in the table below are used to synchronize task data between Outlook and Sage CRM in Classic Outlook Integration.

<table>
<thead>
<tr>
<th>Outlook</th>
<th>Sage CRM (Translation)</th>
<th>Sage CRM (Column)</th>
</tr>
</thead>
<tbody>
<tr>
<td>End time</td>
<td>Due Date/Time</td>
<td>comm_datetime</td>
</tr>
<tr>
<td>Start time</td>
<td>Start Date/Time</td>
<td>comm_todatetime</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject</td>
<td>comm_subject</td>
</tr>
<tr>
<td>Body</td>
<td>Details</td>
<td>comm_note</td>
</tr>
<tr>
<td>Status</td>
<td>Status</td>
<td>comm_status</td>
</tr>
<tr>
<td>Priority</td>
<td>Priority</td>
<td>comm_priority</td>
</tr>
<tr>
<td>Reminder</td>
<td>Reminder Date/Time</td>
<td>comm_notifydelta</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
<td>comp_name</td>
</tr>
<tr>
<td>Person</td>
<td>Person</td>
<td>pers_firstname + pers_lastname (and other columns)</td>
</tr>
<tr>
<td>% Complete</td>
<td>Percent Complete</td>
<td>comm_percentcomplete</td>
</tr>
</tbody>
</table>

Task status mappings

The mappings in the table below are used to synchronize task status data from Outlook and Sage CRM.

<table>
<thead>
<tr>
<th>From Outlook</th>
<th>To Sage CRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Pending</td>
</tr>
<tr>
<td>In Progress</td>
<td>In Progress</td>
</tr>
<tr>
<td>Waiting On Someone Else</td>
<td>Pending</td>
</tr>
<tr>
<td>Deferred</td>
<td>Pending</td>
</tr>
<tr>
<td>Completed</td>
<td>Complete</td>
</tr>
</tbody>
</table>

The mappings in the table below are used to synchronize task status data from Sage CRM to Outlook.
<table>
<thead>
<tr>
<th>From Sage CRM</th>
<th>To Outlook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Not Started</td>
</tr>
<tr>
<td>In Progress</td>
<td>In Progress</td>
</tr>
<tr>
<td>Complete</td>
<td>Completed</td>
</tr>
<tr>
<td>Canceled</td>
<td>Not Started</td>
</tr>
</tbody>
</table>
Customizing task and appointment details

You can customize the Sage CRM details that are added to tasks and appointments sent from Sage CRM to Outlook. The additional details are added to the tasks and appointments created in Outlook, but they are not added to the tasks and appointments in Sage CRM.

1. Click <My Profile> | Administration | Customization | Translations.
2. Enter OutlookServerSide in Caption Family.
3. To customize tasks, enter OTL_TaskDetails in Caption Codes. To customize appointments, enter OTL_AppointmentDetails in Caption Codes.
4. Click Find.
5. Click the Caption Code link and click Change.
6. Add tags. For example, to add a fax number to the company section:

   **Original:**
   
   `<Company>Company:
   Name: <comp_name/>
</Company><Account>Account
Name: <acc_name/>
</Account><Person>Person:
Name: <pers_firstname/> <pers_lastname/>
Phone: (<pers_phonecountrycode/>)<pers_phoneareacode/> <pers_phonenumber/>
</Person><Address>Address:
Street: <addr_address1/>
City: <addr_city/>
</Address>

   **Changed:**
   
   `<Company>Company:
   Name: <comp_name/>
Fax: <comp_faxnumber/>
</Company><Account>Account
Name: <acc_name/>
</Account><Person>Person:
Name: <pers_firstname/> <pers_lastname/>
Phone: (<pers_phonecountrycode/>)<pers_phoneareacode/> <pers_phonenumber/>
</Person><Address>Address:
Street: <addr_address1/>
City: <addr_city/>
</Address>

7. Click Save.
8. Click <My Profile> | Administration | System | Metadata to refresh the translation metadata.
9. To implement the change, log off Sage CRM and Outlook and then log back on to Sage CRM and Outlook.

Lite Outlook Integration

- About Lite Outlook Integration
- Setting up Lite Outlook Integration
- Deploying the plugin using Group Policy

About Lite Outlook Integration

Lite Outlook Integration lets users add contacts to Sage CRM from the Outlook client, file single or multiple Outlook emails to one or more Sage CRM records, and attach Sage CRM shared documents to Outlook emails. Lite Outlook Integration does not synchronize any data between Outlook and Sage CRM. For this reason, it should be used with Exchange Integration. For more information, see About Exchange Integration.

Lite Outlook Integration supports email accounts running on Microsoft Exchange Server MAPI or POP3. It supports Roaming Profiles. This is a Windows feature that allows a user profile to be stored on a central server rather than on each individual local machine (local profile). For more information, see msdn.microsoft.com/en-us/library/windows/desktop/bb776892(v=vs.85).aspx.

How to enable Lite Outlook Integration

In order to use Lite Outlook Integration, a user must download and install a plugin on the Outlook client machine. The plugin works on both 32-bit and 64-bit machines. As a system administrator, you can enable Lite Outlook Integration and display the plugin button so the user can manually install the plugin.
### How to use Group Policy with the plugin

As an alternative to letting users manually install the Lite Outlook Plugin, you can use Group Policy to deploy the plugin to client machines and then hide it from specific users. You might want to hide the plugin from users who are not machine administrators. Group Policy provides centralized configuration and management of user settings.

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify Lite Outlook installation parameters and values in the MSI property table.</td>
<td>Lite Outlook Plugin installer parameters</td>
</tr>
<tr>
<td>Roll out the prerequisite software and the Lite Outlook Plugin using Group Policy.</td>
<td>Deploying the Plugin using Group Policy</td>
</tr>
</tbody>
</table>

### Lite Outlook Integration licenses

The Lite Outlook Plugin uses Sage CRM concurrent licenses as follows:

- If a user is filing emails or adding contacts in Outlook using the plugin, one seat of a concurrent license is used.
- If a user is filing emails or adding contacts in Outlook using the plugin, and is also logged on to Sage CRM using a browser, one seat of a concurrent license is used.
- If a user is filing emails or adding contacts in Outlook using the plugin, and a second user is logged on to Sage CRM using a browser, two seats of a concurrent license are used.
- The license is freed up when Outlook closes or the Sage CRM session expires. Where a user is using the plugin in Outlook and using Sage CRM in a browser, the license is freed only when both Outlook and the Sage CRM session close. The license is not freed when the user action (synching, or filing an email) completes.
Setting up Lite Outlook Integration

- Configuring Lite Outlook Integration
- Changing Lite Outlook Plugin port
- Enabling logging for Lite Outlook Integration

Configuring Lite Outlook Integration

1. Click <My Profile> | Administration | Users | User Configuration
2. Click Change.
3. To display the Install Lite Outlook Integration button that lets users download and install the Lite Outlook Plugin, set Outlook Integration Options to Lite Outlook Integration. If Exchange Integration is enabled, the Lite Outlook plugin provides additional functionality to the Exchange Integration. Alternatively, set Outlook Integration Options to Both to display both the Classic Outlook button and the Lite Outlook button on a 32-bit system. It displays only the Lite Outlook button on a 64-bit system. Only one plugin can be installed.
4. Click Save.

Changing Lite Outlook Plugin port

You might need to change the default port used by the Lite Outlook Plugin installer because you’re using Sage CRM over HTTPS, or you’re using a non-standard port. The port number is displayed in the CRM Server connection settings in the plugin install wizard. This value is controlled by the OutlookPort entry on Custom_Sysparams.

1. Open SQL Server Management Studio.
2. To change the default port, run the following SQL query:
   ```sql
   update custom_sysparams set parm_value = '<PortNumber>' where parm_name = N'OutlookPort'
   ```
   In your query, replace `<PortNumber>` with the actual port number you want to use.
3. Perform a metadata refresh and include the system params in the refresh.
4. To select the Use secure connection (HTTPS) checkbox by default, install the plugin using Group Policy and set SCRMHTTPS to 1. For more information, see Lite Outlook Plugin installer parameters.
Enabling logging for Lite Outlook Integration

Lite Outlook Plugin error messages are sometimes disabled due to an issue with Microsoft's Visual Studio Tools for Office (VSTO) which suppresses error messages by default. You can enable messages by adding two environment variables on your computer.

1. Ensure you have the latest version of VSTO. You can download it here: https://www.microsoft.com/en-GB/download/details.aspx?id=48217
2. Close Outlook.
3. On your computer go to Computer | System Properties | Advanced.
4. Click Environment Variables.
5. In the System variables panel, click New.
   - Enter VSTO_SUPPRESSDISPLAYALERTS in Variable name and enter 0 in Variable value.
   - Click Save.
6. In the System variables panel, click New.
   - Enter VSTO_LOGALERTS in Variable name and enter 1 in Variable value.
   - Click Save.
Deploying the plugin using Group Policy

- Lite Outlook Plugin installer parameters
- Deploying the Plugin using Group Policy

Lite Outlook Plugin installer parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCRMSERVERNAME</td>
<td>Name of the Sage CRM server. You must add this parameter to the property table.</td>
</tr>
<tr>
<td>SCRMINSTALLNAME</td>
<td>Name of the Sage CRM installation. You must add this parameter to the property table.</td>
</tr>
<tr>
<td>SCRMHOSTING</td>
<td>Indicates if the Sage CRM installation is on-premise. Set the value to 0 for on-premise installations. You must add this parameter to the property table.</td>
</tr>
<tr>
<td>SCRMSERVERPORT</td>
<td>Port of the Sage CRM server. The default value is 80. Change the value only if 80 is not the Sage CRM server port.</td>
</tr>
<tr>
<td>SCRMHTTPS</td>
<td>Determines whether the plugin should connect using secure connection (1) or no secure connection (0, default). Change the value only if you require the plugin to connect to Sage CRM over HTTPS.</td>
</tr>
<tr>
<td>SCROMOFFICEVERSION</td>
<td>The version of Outlook that Sage CRM uses. Set to Auto to detect the version of Outlook running on the client machine. Use Auto if you're deploying the plugin to machines running different versions of Outlook. Set to 16 to specify Outlook 2016. Set to 15 to specify Outlook 2013. Set to 14 to specify Outlook 2010.</td>
</tr>
<tr>
<td>SCRMMUILANGUAGE</td>
<td>The default language of the Sage CRM installation. The default value is US. Change the value only if every client machine receiving the plugin has the same Outlook version installed. The first time a user uses the plugin, all plugin buttons in Outlook contain captions from the Sage CRM default language. When the user logs in to Sage CRM through the plugin (for example, by filing an email), all translations specific to the user's language preference are downloaded to the Outlook machine for that user. The next time Outlook is launched, all captions appear in the user's preferred language.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SCRMDOMAINNAME</td>
<td>Name of the domain on which Sage CRM is installed. You must add this parameter to the property table if IIS Auto Login is used.</td>
</tr>
</tbody>
</table>
Deploying the Plugin using Group Policy

Group Policy deployment supports the roll out of files with a .msi or .msp extension only. The Lite Outlook Plugin and Microsoft Office PIA (prerequisite for Lite Outlook Integration) have .MSI extensions. However, the .NET Framework and Visual Studio Tools for Office Runtime (VSTOR) are available in setup.exe format only and cannot be deployed using Group Policy.

1. Go to %ProgramFiles%\SageCRM\install name\WWWRoot\Plugin and install the .NET Framework on the relevant client machines. It is available through the Windows Update service or you can deploy it using Windows Server Update Service (WSUS). The .NET Framework is shipped with Sage CRM. For more information, see http://msdn.microsoft.com/library/ee390831%28v=VS.100%29.aspx.

2. To install VSTOR, you must extract the .msi file from the .exe.
   - Create a shared folder on the server. For example, c:\vstor on a machine called net01.
   - Open the Windows Run command, and execute the following command to perform an administrative install to extract all the files.
     %ProgramFiles%\Sage\CRM\CRM\WWWRoot\Plugin\vstor40_x86.exe /a
   - Run the Administrative install wizard and specify that the source files are saved in the shared folder you created. For example, net01\vstor. Remember to use a UNC path for this.
   - Copy the entire contents of the shared folder to the deployment area on your domain controller (or wherever you deploy GPO software from).
   - From within Group Policy Management, you can now create a new policy pointing to the extracted vstor40_x86.msi file to roll out the VSTOR to all your client machines. Run the installation in quiet mode.

   - Open Sage CRM Client Applications.MSI using Orca.
     - Click Property | Tables | Add Row and add two parameters; SCRMSERVERNAME and SCRMINSTALLNAME. For more information, see Lite Outlook Plugin installer parameters.

4. Rename Sage CRM Client Applications.msi to CRMPlugin.msi before deploying it to remove spaces from the filename.

5. Install the plugin on all relevant machines through Group Policy and run the installation in quiet mode. The plugin is installed when the machine starts up.
   - You can automatically upgrade the deployed plugin using the Redeploy functionality of Group Policy. The upgrade runs in silent mode when the machine starts up.
   - You can automatically uninstall the plugin using the Remove functionality of Group Policy. The uninstall runs in silent mode when the computer machine start up.

6. To hide the plugin from specific users on machines that have the plugin installed, disable the plugin from the registry.
   - Add the string value PluginDisabled to HKey_Current_User\Software\Sage\Exchange Outlook Plugin\
Set the string value Y if the plugin should not appear in Outlook on this machine for users with this string value.

If this string value is not present in the registry for specific users, or if it is present but its value = N or any other value other than Y, the plugin appears in Outlook as normal for those users.

This string value can be added to the registry of the machines for specific users (specific HKey_Current_User registry entries) through Group Policy.


E-marketing overview

Sage E-marketing for Sage CRM is an integration with Swiftpage (http://www.swiftpage.com). All E-marketing activity is initiated from within the Sage CRM user interface. This is how it works:

1. The System Administrator logs on to Sage CRM and registers for the E-marketing service.
2. An E-marketing account and users are created on the Swiftpage server.
3. The E-marketing account is registered on the Swiftpage server and the E-marketing functionality is enabled in Sage CRM.
4. An E-marketing user logs on to Sage CRM and creates an E-marketing campaign.
5. E-marketing email details are immediately sent from Sage CRM to the Swiftpage server.
6. The E-marketing email is sent from the Swiftpage server to the recipient group specified by the Sage CRM user.
7. The recipient interaction with the E-marketing email (opens, clicks, etc.) is returned to the Swiftpage server.
8. Once a day, all data from all E-marketing campaigns is synchronized from Swiftpage to Sage CRM.
9. The Sage CRM E-marketing user receives the campaign analysis data.

**Synchronization times**

The Sage CRM Sync time is configured (for all regions) to 23:00 local time. You should keep the Sage CRM Sync time outside of office hours.

The Swiftpage Sync time, which collates all of the daily results, completes at 03:00 Mountain Time. Mountain Time is GMT -6 hours (Mountain Daylight Time) or -7 hours (Mountain Standard Time). This includes information about anyone who has opted out of receiving E-marketing emails from your company.

This means that it may take up to 48 hours for the opt-out information to reach Sage CRM. For example (all times GMT), a recipient opts out at 3 pm on the February 20th. Swiftpage collates the results at 10 am on February 21st. Sage CRM synchronizes this information back at 11 pm on the February 21st which is 32 hours after the opt-out occurred.

Users can change the Sage CRM Sync time by editing *SyncEngineConfiguration.xml* in ..\Program Files\Sage\CRM\<installname>\tomcat\webapps\<installname>SPSyncEngine\WEB-INF.

The syntax is:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
<!-- sync schedule parameters -->
<syncStartTimeHour>23</syncStartTimeHour>
<syncStartTimeMinute>0</syncStartTimeMinute>
</configuration>
```

**Activating the E-marketing service**

E-Marketing Configuration is available in Sage CRM systems that include the Campaign Management module.

To access E-marketing Configuration, you must be an Info Manager with email and template rights or a System Administrator. You must also be connected to the Internet.

Working with E-marketing, even on a trial account, requires strict adherence to anti-spam laws. You must ensure you comply with the US CAN-SPAM Act and your own regional anti-spam regulations. The essence of most regulation is that email recipients must opt in to receiving email from your company, that you clearly identify yourself, and make it easy for recipients to opt out. Useful guidelines and links from Swiftpage can be found here: [http://www.swiftpage.com/deliverability/antispampolicy.htm](http://www.swiftpage.com/deliverability/antispampolicy.htm). More information can also be found in the *Sage CRM User Guide*. 
If you were previously using E-Marketing, then switched to MailChimp, and now want to use E-Marketing again, you can re-enable E-Marketing. Click `<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Enable Integration`. You should back up the SQL database before you use this option.

1. Click `<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Sign up for free E-marketing trial account`. The trial account lets you try out Email E-marketing with a low email send limit for the period of the trial.
2. Complete the E-marketing account and user fields. The User & Contact and Email fields are required for Swiftpage to comply with US anti-spam laws. They are used in standard footers for E-marketing email templates, but you can modify them later.
3. Click Continue.
4. Click Save. The full E-marketing Configuration menu is displayed, and a blue banner giving you your account status. A verification email is sent to the Email Address specified in the User Details panel. Check your Junk Email folder if you don't receive the email in your inbox.
5. Click the link in the verification email.
6. Read and accept the terms and conditions. You can purchase a full Swiftpage account now or later.

### E-marketing account and user fields

#### Account Details panel

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name</td>
<td>E-marketing Account Name. The Account Name must be unique (to Swiftpage), made up of alpha-numeric characters, and not contain any spaces.</td>
</tr>
<tr>
<td>Account Password</td>
<td>Password for the E-marketing Account.</td>
</tr>
<tr>
<td>Billing Currency</td>
<td>Select currency. This is the currency you will be quoted and billed in when you purchase the full Swiftpage service. Once saved, this field cannot be edited.</td>
</tr>
</tbody>
</table>
# User Details panel

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>User name of the E-marketing user.</td>
</tr>
<tr>
<td>Password</td>
<td>Select a password for the E-marketing user. This can be changed by the user (from Marketing</td>
</tr>
<tr>
<td>Email Signature Line</td>
<td>Maps to the SignOff field in Swiftpage templates. Should contain sign off phrase such as &quot;Regards,&quot; or &quot;Thanks,&quot;. Only available when editing an existing user.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Type in the email address for the E-marketing user. When this user sends out emails, this will be the From address. This can be changed by the user from Marketing</td>
</tr>
<tr>
<td>User</td>
<td>Select from a list of Sage CRM users to map the E-marketing user to. Only one Sage CRM user can be mapped to one E-marketing user. The first E-marketing user - the E-marketing Account Administrator - must be a full System Administrator in Sage CRM. All E-marketing users must be at least Info Managers to work with E-marketing. You can disable the E-marketing and Drip Marketing User options on the E-marketing Account Administrator, so that the E-marketing license can be made available for a marketing user. This can be done from &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Drip Marketing</td>
<td>Available when adding a new E-marketing user to an existing E-marketing Account only. Select to give the user access to the Marketing</td>
</tr>
<tr>
<td>E-marketing</td>
<td>Available when adding a new E-marketing user to an existing E-marketing Account only. Select to give the user access to the Marketing</td>
</tr>
</tbody>
</table>
### User & Contact Details panel

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name</td>
<td>Full name of the E-marketing user.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job title of the E-marketing user.</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the E-marketing user.</td>
</tr>
<tr>
<td>Company Name</td>
<td>Company where the E-marketing user works.</td>
</tr>
<tr>
<td>Address</td>
<td>First line of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>Address (optional)</td>
<td>Second line of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>City</td>
<td>City of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>State</td>
<td>State of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>Postal/Zip Code</td>
<td>Post or zip code of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>Country</td>
<td>Country of the address of the company where the E-marketing user works.</td>
</tr>
<tr>
<td>Web Site</td>
<td>Web site of the company where the E-marketing user works.</td>
</tr>
</tbody>
</table>

### Email Details panel

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy contact details from above</td>
<td>Select to copy the details entered in the User &amp; Contact Details panel. The information in the Email panel is used in standard E-marketing email templates, including footer information. This is to comply with anti-spam regulations.</td>
</tr>
<tr>
<td>Company Name</td>
<td>Company name used in email templates.</td>
</tr>
<tr>
<td>Address</td>
<td>First line of address used in email templates.</td>
</tr>
<tr>
<td>Address (optional)</td>
<td>Second line of address used in email templates.</td>
</tr>
<tr>
<td>City</td>
<td>City of address used in email templates.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>State of address used in email templates.</td>
</tr>
<tr>
<td>Postal/Zip Code</td>
<td>Post or zip code of address used in email templates.</td>
</tr>
<tr>
<td>Country</td>
<td>Country code of address used in email templates.</td>
</tr>
<tr>
<td>Web Site</td>
<td>Web site of address used in email templates.</td>
</tr>
</tbody>
</table>

**Adding users to the E-marketing account**

1. Click *<My Profile> | Administration | Email and Documents | SwiftPage E-marketing*.
2. Click *Add a User to the Account*.
3. Complete the *E-marketing account and user fields*. Click *Continue*.
4. Complete the remainder of the fields and click *Save*. A verification email is sent to the new user.

You can also add a user to the E-marketing account when you are creating the user in Sage CRM. For more information, see *Setting up a new user* and *User fields*.

**Viewing or upgrading E-marketing account options**

1. Click *<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | View Plan Options / Upgrade*. The current service level and options are displayed in a new window.
2. Choose the service level and options you want to purchase, and click *Submit*.
3. Enter your credit card details and click *Purchase*. A warning dialog is displayed for payment verification purposes.
4. Purchase confirmation and invoice details are sent to the email address of the main E-marketing Administrator.

You can set up new users and change purchased email send limit assignments. For more information, see *Adding users to the E-marketing account* and *Editing E-marketing users*.

**Editing E-marketing users**

1. Click *<My Profile> | Administration | Email and Documents | SwiftPage E-marketing*. 
2. Click **Edit Users**. Your current Account Limits are displayed in view mode in the top panel. The lower part of the page shows the list of E-marketing users. All send limits are on a per-day basis, reset once a day (within a 24-hour period).

3. Click **Change** to edit the email send allowance allocation and/or the E-marketing settings for all users in the list. You cannot change the send allowances or E-marketing/Drip Marketing User check boxes on Trial accounts.

4. To edit settings for a specific user, click the user. For more information, see E-marketing account and user fields. E-marketing users can edit their own user details from **<My Profile> | Preferences | E-marketing User Profile** tab. They can view, but not change their allowance or E-marketing rights.

5. If you change the email address, the verification email is automatically resent. The user must click the verification link for the change to take effect. If the user deleted the first email by mistake before completing the verification process, click **Resend Verification Email** to resend the email.

### Editing E-marketing account details

1. Click **<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Edit Account Details**.
2. Click **Change**.
3. Enter a new password in **Account Password**.
4. Click **Save**.

### Canceling the E-marketing account

1. Click **<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Cancel the Account**.
2. Click **Cancel the Account**.

### Re-activating the E-marketing account

1. Click **<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Re-activate Account**.
2. Follow the on-screen instructions.

If you create a new account when there are still campaigns associated with an old canceled account, campaigns associated with the old account are deleted when the new account is created.
MailChimp Integration

- What is MailChimp?
- Integrating Sage CRM and MailChimp
- Adding users to MailChimp
- Renaming MailChimp campaign merge fields
- Disabling a MailChimp Integration

What is MailChimp?

MailChimp is an email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results. It's less complicated than SwiftPage and comes with a free plan. Here's how it works.

1. The System Administrator logs on to Sage CRM and integrates Sage CRM with MailChimp. This involves creating a MailChimp account and adding a MailChimp API key and List ID to Sage CRM so they can communicate with each other.
2. The System Administrator specifies how frequently campaign statistics are synchronized from MailChimp to Sage CRM.
3. The System Administrator grants MailChimp access rights to Sage CRM users.
4. The user logs on to Sage CRM and sends information about the Sage CRM contacts to be used in a new MailChimp campaign to the MailChimp server.
5. The user creates a MailChimp campaign. This involves designing a template, adding text, and specifying a recipient group.
6. The user sends the emails, schedules them to be sent at a specified time, or saves the campaign for future use.
7. The MailChimp server sends campaign emails to the specified recipient group.
8. The recipient interaction with the campaign email (opens, clicks, unsubscribes) is returned to the MailChimp server. The recipient can chose to opt out from the campaign.
9. Data from all campaigns is synchronized from the MailChimp server to Sage CRM. Communication records are created in Sage CRM for each recipient. Recipients who have opted out are flagged and do not receive any further campaign emails.
10. The user receives the campaign analysis data.

There are three types of MailChimp pricing plan. On the free plan, you can send 12,000 emails to 2,000 subscribers per month. If you need to send more emails or have more subscribers, you can upgrade to a paid plan. For more information, see mailchimp.com/pricing.
Integrating Sage CRM and MailChimp

1. If you’ve previously enabled Swiftpage, you must disable it before you can set up MailChimp. Click <My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Disable Integration. It’s important to back up the SQL database before you use this option because it might corrupt Swiftpage data in the SQL tables.

2. Click <My Profile> | Administration | Email and Documents | MailChimp Integration.

3. Create a MailChimp account.

4. Get the MailChimp API key and enter it in MailChimp API Key. Sage CRM uses this key to communicate with MailChimp.

5. Get the MailChimp List ID and enter it in MailChimp List ID. Sage CRM uses this ID to send subscriber information to MailChimp.

6. Set synchronization frequencies.
   a. In Communications and Opt out requests, specify how often a communication record is created for each email recipient, and how often opt out messages are applied to remove recipients from a campaign.
   b. In Campaign results, specify how often campaign statistics are synchronized from MailChimp to Sage CRM.

7. Click Save. Sage CRM is integrated with MailChimp for your Sage CRM account.

Note: If you’re re-enabling a disabled MailChimp integration, click <My Profile> | Administration | Email and Documents | MailChimp Integration | Edit | Enable.

Creating a MailChimp account

1. Browse to the MailChimp signup page or click <My Profile> | Administration | Email and Documents | MailChimp Integration and click create a MailChimp account in the coaching caption.

2. Enter an email address, username, and password and click Create My Account.

3. Click Activate Account in the MailChimp email that’s sent to your email address.

4. Enter the reCAPTCHA phrase and click Confirm Signup.

5. Enter your personal details and click Save And Get Started.

Note: When a user creates a new MailChimp campaign in Sage CRM, they must log on to MailChimp. They can log on using the administrator account details that you used when creating the MailChimp account. If you don’t want them to use the administrator log on details, you can create another user in MailChimp with Manager rights. This type of user can send Mailchimp campaigns.
Getting a MailChimp API key

As part of the integration process between Sage CRM and MailChimp, you must find and specify an API key. Sage CRM uses this key to communicate with MailChimp. Before you can get the API key, you must first create a MailChimp account. For more information, see Creating a MailChimp account.

1. In MailChimp, click your profile name to open the Account Panel and click Account.
2. Click the Extras drop-down and choose API keys.
3. Copy an existing API key or click Create A Key.
4. Click none set in the Label column and name your key for future reference.

After you've integrated Sage CRM and MailChimp, you can change the API key. If you change it to another API key on the existing MailChimp account, all campaigns remain active. However, if you change it to an API key on a different account, all campaigns are disabled and campaign statistics are not updated automatically or manually. You can't revert to the old API key. This means that if campaigns are disabled, you can't reenable them.

Getting a MailChimp List ID

As part of the integration process between Sage CRM and MailChimp, you must find and specify a List ID. Sage CRM uses this ID to send subscriber information to MailChimp. Before you can get the List ID, you must first create a MailChimp account. For more information, see Creating a MailChimp account.

1. In MailChimp, click Lists.
2. If you don't have a list set up, click Create List.
   - Enter the list details.
   - Select how you want to receive notifications whenever someone on your list opens an email.
   - Click Save.
3. Click the Stats drop-down beside the list name and choose Settings. If you have only one list and no subscribers, click Settings at the top of the page.
4. Click List name & defaults to find the unique List ID for the list.

After you've integrated Sage CRM and MailChimp, you can change the List ID. If you change it to another List ID on the existing MailChimp account, all campaigns remain active. However, if you change it to a List ID on a different account, all campaigns are disabled and campaign statistics are not updated automatically or manually. You can't revert to the old List ID. This means that if campaigns are disabled, you can't reenable them.

Adding users to MailChimp

When you've integrated Sage CRM and MailChimp, you can configure users' settings so they can create and send campaign emails from MailChimp.
1. Click <My Profile> | Administration | Users | Users and search for the user that you want to configure.
2. Click the Last Name hyperlink.
3. Click Change.
4. Choose Yes from Enable MailChimp and click Save.

When a user creates a new MailChimp campaign in Sage CRM, they must log on to MailChimp. They can log on using the administrator account details that you used when creating the MailChimp account. If you don't want them to use the administrator log on details, you can create another user in MailChimp with Manager rights. A Manager can create and send campaigns, import lists, and view reports.

1. In MailChimp, click your profile name to open the Account Panel and click Account.
2. Click the Settings drop-down and choose Users.
3. Click Invite a User.
4. Enter the email address of the Sage CRM user that you've enabled for MailChimp.
5. Select Manager.
6. Enter an invitation message.
7. Select the reCAPTCHA checkbox.
8. Click Send Invite. The email recipient can create a username and password for their new MailChimp account. For more information, see Manage User Levels in Your Account.

Renaming MailChimp campaign merge fields

You can rename Sage CRM merge fields in MailChimp to reflect customization changes.

1. In MailChimp, click Lists.
2. Click the Stats drop-down beside the list name and choose Settings. If you have only one list and no subscribers, click Settings at the top of the page.
3. Click List fields and Merge tags and enter the new names.
4. Click Save Changes.

<table>
<thead>
<tr>
<th>Field label and type</th>
<th>Sage CRM field name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name</td>
<td>COMPNAME</td>
</tr>
<tr>
<td>Company email address</td>
<td>COMP_EMAIL</td>
</tr>
<tr>
<td>Company type</td>
<td>COMP_TYPE</td>
</tr>
<tr>
<td>Company status</td>
<td>COMP_STATU</td>
</tr>
<tr>
<td>Company source</td>
<td>COMP_SOURC</td>
</tr>
<tr>
<td>Company territory</td>
<td>COMP_TERRI</td>
</tr>
<tr>
<td>Field label and type</td>
<td>Sage CRM field name</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Company revenue</td>
<td>COMP_REVEN</td>
</tr>
<tr>
<td>Company employees</td>
<td>COMP_EMPLO</td>
</tr>
<tr>
<td>Company sector</td>
<td>COMP_SECTO</td>
</tr>
<tr>
<td>Company website</td>
<td>COMP_WEB</td>
</tr>
<tr>
<td>Person first name</td>
<td>FNAME</td>
</tr>
<tr>
<td>Person last name</td>
<td>LNAME</td>
</tr>
<tr>
<td>Person email address</td>
<td>PER_EMAIL</td>
</tr>
<tr>
<td>Person salutation</td>
<td>PER_SALUTA</td>
</tr>
<tr>
<td>Person title</td>
<td>PER_TITLE</td>
</tr>
<tr>
<td>Person title code</td>
<td>PER_TITLEC</td>
</tr>
<tr>
<td>Person department</td>
<td>PER_DEPART</td>
</tr>
<tr>
<td>Person status</td>
<td>PER_STATUS</td>
</tr>
<tr>
<td>Person source</td>
<td>PER SOURC</td>
</tr>
<tr>
<td>Person gender</td>
<td>PER_GENDE</td>
</tr>
<tr>
<td>Lead description</td>
<td>LEADDESC</td>
</tr>
<tr>
<td>Lead person email</td>
<td>LEA_EMAIL</td>
</tr>
<tr>
<td>Lead company name</td>
<td>LEA_COMPNA</td>
</tr>
<tr>
<td>Lead first name</td>
<td>LEA_FNAME</td>
</tr>
<tr>
<td>Lead last name</td>
<td>LEA_LNAME</td>
</tr>
<tr>
<td>Lead company country</td>
<td>LEA_COUNTR</td>
</tr>
<tr>
<td>Lead salutation</td>
<td>LEA_SALUTA</td>
</tr>
<tr>
<td>Lead source</td>
<td>LEA_SOURCE</td>
</tr>
<tr>
<td>Lead stage</td>
<td>LEA_STAGE</td>
</tr>
<tr>
<td>Lead status</td>
<td>LEA_STATUS</td>
</tr>
</tbody>
</table>
Disabling a MailChimp Integration

1. Click <My Profile> | Administration | Email and Documents | MailChimp Integration.
2. Click Disable. Data from all campaigns is no longer automatically synchronized from MailChimp to Sage CRM and users can’t manually synchronize the data for individual campaigns.

To re-enable the MailChimp Integration, click Enable. The Opt out of E-Marketing checkbox on a Company, Lead, or Person record indicates whether the record has unsubscribed from a MailChimp campaign. If you disable and then re-enable the Sage CRM and MailChimp Integration, this checkbox is no longer displayed. You must perform a metadata refresh in order to display it.

Document templates

- Working with templates
- Performing a mail merge
- Creating a template
- Uploading a template
- Editing a template
- Deleting a template
- Troubleshooting templates
- Document and report settings

Working with templates

- Mail merge is a server-side process. You don’t need Microsoft Word on your client machine to perform a mail merge. However, you do require Microsoft Word or another program that opens .DOCX files to view and print merged documents.
- A number of sample templates are included in a standard install. To check the templates in your install, click <My Profile> | Administration | Email and Documents | Document Templates.
- You can create new Microsoft Word templates and upload them so users can work with them. For more information, see Creating a Word template.
- You can work with existing Microsoft Word templates, but you can’t edit them part way through the mail merge process.
- You must remove column, section, or line breaks from existing MS Word templates.
- You must use Insert | Quick Parts in Word to add any new merge fields to existing and new MS Word templates.
• You must modify existing Microsoft Word templates that contain nested items for the merge to work successfully. Quote and order templates contain nested items. For more information, see Editing a template.

• You can create new templates using Sage CRM’s rich text editor. Any new templates you create are saved in HTML format. For more information, see Creating a template.

• Uploaded templates and images reside in the .\Library\Global Templates folder on the server.

• Mail merge templates contain Sage CRM merge fields. These fields are placeholders for information from the Sage CRM database that's inserted during a merge. For example, the merge field <<comp_name>> is replaced by an actual company name when the merge between the template and the database data is executed.

• The available merge fields depend on the context you’re in, so ensure you start the merge in the correct context. For example, to include merge fields from the opportunity table, start the merge process in the context of an Opportunity.

• You should only enter merge fields from one primary entity when creating a new template in Microsoft Word. For example, when creating a template for use with Case records, you can enter case, person, company, address and user merge fields but not quote merge fields.

• Mail merge templates are available only in the context with which they’re associated. For example, only Case templates are available in the Case context. If you attempt to use a template outside of its context - for example a quotation mail merge template in the Case context - the merge fields won’t convert successfully.

• The amount of memory required for mail merge depends on the number of records being merged as well as the size of the template (number of graphics included, amount of text, etc.). The mail merge memory can be set by adjusting the Max Mail Merge Memory setting in <My Profile> | Administration | Email and Documents | Documents and Reports Configuration. The default setting is 1GB, but this can be increased if required.

• The number of users who can perform concurrent mail merges is set to a default maximum value of 5, but this can also be increased from <My Profile> | Administration | Email and Documents | Documents and Reports Configuration | Max Mail Merges Allowed. If this setting is increased, more memory will be required, so the Max Mail Merge Memory setting should also be increased.

• If more than 1500 .DOCX records are merged, the merged documents are saved in .DOC format.

• When creating a mail merge using opportunity merge fields you must include TableStart and TableEnd tags even if you don’t use nested items. If you don’t include these tags, the merge fails with no errors given.

Performing a mail merge

You can perform a mail merge and create a document using an existing template with merged record details.

1. On the top bar, click the Search arrow and click <Entity>.
2. Enter your search criteria and click Find.
3. To select the record to use in the mail merge, click the record link.
4. Right-click **New | Merge to Word** or **Merge to PDF**. Alternatively, click the **Documents** tab and click **Merge to Word** or **Merge to PDF**. A list of shared templates is displayed.

5. If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.

6. To select a template to use in the mail merge, click the template link.

7. Click **Merge and Continue**. The merge is completed.

## Creating a template

- **Creating a template**
- **Text editor buttons**
- **Mail merge views**
- **Uploading an image file**
- **Creating a Word template**
- **Creating a Quote or Order template**
- **Creating a Word label template**

## Creating a template

You can add new templates for your own use. Ensure you’re in the context you want the template to be associated with. For example, open a Case record to create a template that uses case merge fields.

1. Click the **Documents** tab and click **Merge to Word** or **Merge to PDF**.
2. If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn’t displayed.
3. Click **Create Template** and enter details in **File** and **Description**.
4. Create and format the main body of your template. You can paste content from Microsoft Word or HTML source code into the rich text editor. For more information, see **Text editor buttons**.
5. Insert any images you want to use in the template by inserting the image name in an HTML IMG tag. For example, `<img src="logo.jpg">`. To insert an image, you must first upload it to the server. For more information, see **Uploading an image file**.
6. Choose Sage CRM merge fields from **Insert Sage CRM Field**. If you need a merge field that’s not available, ensure you started the merge in the correct context. For example, to include merge fields from the opportunity table, start the merge process in the context of an Opportunity. If you’re in the correct context and don’t have the required fields, you can customize the mail merge view for the main entity of the mail merge. For more information, see **Editing a view**.
7. When creating a mail merge using opportunity merge fields you must include TableStart and TableEnd tags even if you don’t use nested items. If you don’t include these tags, the merge fails.
8. To preview the merged document, click **Preview Merge**. If you're merging multiple records, the preview shows only the first record in the group.
9. Click **Save Template**. The new template is saved in HTML format and made available as global shared templates. To make the template available to all users, you must upload it. For more information, see **Uploading a template**.
10. To edit a new template, use the rich text editor when performing a mail merge. You can also edit a template in <My Profile> | Administration | Email and Documents | Document Templates if you’re working with IE and using the Active X Plugin. Status must be set to Draft and you must use a text editor program such as Notepad as the default program to open .HTM and .HTML files. Use this method to edit HTML templates only if you have HTML experience. Incorrect changes to HTML can prevent templates working properly.

Configure use of the Active X Plugin in <My Profile> | Administration | Email and Documents | Documents and Reports Configuration.

**Text editor buttons**

Use the Sage CRM text editor to format the body of a mail merge template or email template. The following table explains buttons whose function might not be immediately obvious. Hover over a button to view the button name.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source</td>
<td>View or edit the source code of the document.</td>
</tr>
<tr>
<td>Preview</td>
<td>See what the final template will look like.</td>
</tr>
<tr>
<td>Link</td>
<td>Add a link to an email address, anchor, or web site.</td>
</tr>
<tr>
<td>Unlink</td>
<td>Remove a link to an email address, anchor, or web site.</td>
</tr>
<tr>
<td>Anchor</td>
<td>Insert a marker in your text. You can link to this marker.</td>
</tr>
<tr>
<td>Maximize</td>
<td>Make the text editor window the full size of your screen. You can't maximize the text editor when working on iPad.</td>
</tr>
<tr>
<td>Block Quote</td>
<td>Format the text as a block quote. The text is indented and italicized.</td>
</tr>
<tr>
<td>Create Div Container</td>
<td>Add a div container to apply formatting to a large fragment of text. This is an advanced feature that you should use only if you've sufficient knowledge of Web standards.</td>
</tr>
</tbody>
</table>

**Mail merge views**

The table below shows the mail merge view that’s used for each entity. If the field that you want to add to a mail merge template isn’t included in the associated view, it’s not listed in Insert Sage CRM Field. You can customize mail merge views. For more information, see Editing a view.
<table>
<thead>
<tr>
<th>Entity</th>
<th>View Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Summary</td>
<td>vMailMergeCompany</td>
</tr>
<tr>
<td>Person Summary</td>
<td>vMailMerge</td>
</tr>
<tr>
<td>Case Summary</td>
<td>vMailMergeCase</td>
</tr>
<tr>
<td>Solution Summary</td>
<td>vMailMergeSolution</td>
</tr>
<tr>
<td>Lead Summary</td>
<td>vLeadMailMergeSearchFields</td>
</tr>
<tr>
<td>Opportunity Summary</td>
<td>vMailMergeOpportunity</td>
</tr>
<tr>
<td>Quote Summary</td>
<td>vMailMergeQuotes</td>
</tr>
<tr>
<td>Order Summary</td>
<td>vMailMergeOrders</td>
</tr>
</tbody>
</table>

When carrying out a Solution mail merge using vMailMergeSolution, the Solution must be linked to a Case for the merge to work.

**Uploading an image file**

To use images when creating HTML mail merge templates, you must first upload the images to the Global Templates library on the server.

1. On the top bar, click the **Search arrow** and click `<Entity>`.
2. Enter your search criteria and click **Find**.
3. To select the record to use in the mail merge, click the record link.
4. Right-click **New | Merge to Word** or **Merge to PDF**. Alternatively, click the **Documents** tab and click **Merge to Word** or **Merge to PDF**. If your System Administrator has disabled the Merge to Word option, **Merge to Word** isn't displayed.
5. Click **Add Local Template / Image**.
   - In IE, click **Browse** to navigate to the file.
   - In other browsers, select the image file from its current location. When using Safari, you can add only one file at a time.
   - The file is listed in **File(s)**. A green check mark indicates that it was uploaded. A red cross indicates that it wasn’t uploaded. To upload successfully, a file must comply with the system file size, type, and number of files settings that you’ve defined. For more information, see **Document and report settings**.
7. Enter details for the image file and click **Save**. All uploaded image files are saved. You can insert uploaded images into an HTML template by typing the image name within an HTML IMG tag. For example, `<img src="logo.png">`. To enable users to insert the image when creating a new mail merge template, you must tell them the image file name.
Creating a Word template

You can create mail merge templates in Word that you can upload to Sage CRM.

1. In the main document, type any content that you want to appear on every copy of the document.
2. To add a picture, click Insert | Picture. To ensure your picture and text remain formatted correctly during the merge process, use a table to format your document.
3. To insert a merge field to the template, click Insert | Quick Parts | Field. To ensure the template works properly, a merge field must correspond to the exact field name in Sage CRM. To check the field name in Sage CRM, click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity>. Enter merge fields from only one entity.
4. Select MergeField from Field names.
5. Enter the Sage CRM merge field name in Field name and click OK.
6. Click File | Save As, and save the template in one of the following formats: .DOCX, .HTM, and .HTML. You can now upload the template and make it available to all users. When you upload the template, you must associate it with the entity from which you’ve entered merge fields.

Creating a Quote or Order template

Sage CRM ships with sample Quote and Order templates including a default template for quick quotes and orders. For more information about generating quick quotes and orders, see the User Guide. You can create your own templates to suit your users’ needs and update the default template if required.

1. Open a Quote or Order record.
2. Click the Documents tab and click Merge to Word or Merge to PDF. If your System Administrator has disabled the Merge to Word option, Merge to Word isn't displayed.
3. Click Create Template.
4. Enter template details in File and Description.
5. Create the main body of your template.
   - To insert Sage CRM merge fields, select the fields from Insert Sage CRM Field.
   - To include a table with merge fields, click Insert Nested Region. This inserts the start and end tags for the main table and the child table. For example, Quotes and Quote Items. To display a row of quote item data, the first column in that row must include a TableStart:QuotItems tag, and the final column must include a TableEnd:QuotItems tag.
   - Important: You must include TableStart and TableEnd in the same template section, table row or table cell. This applies even if you’re not using line items.
Basic Quote Mail Merge Template

6. To preview the merged document, click **Preview Merge**. If you're merging multiple records, the preview shows only the first record in the group.

7. Click **Save**. The template is saved in HTML format. To make the template available to all users, you must upload it. For more information, see **Uploading a template**.

8. To set the template as the default quick quote or order template, click <My Profile> | **Administration** | **Email and Documents** | **Document Templates**. Click the template hyperlink, select **Quick Template** and click **Save**.

### Creating a Word label template

You can use Microsoft Word to create a label template. You must insert Sage CRM merge fields manually, and wrap the template in **TableStart:Labels** and **TableEnd:Labels** tags. The template must contain a minimum of two label placeholders, the second of which contains a Next field.

1. Create a new blank document and insert a one row table with enough columns for your labels. Size the cells to the dimensions of the label and align the margins to your label.

2. To insert a **TableStart:Labels** tag in the top left label placeholder, click **Insert | Quick Parts** and select **Field**.

3. Select **MergeField** from **Field names** and enter **TableStart:Labels in Field name**.

4. Repeat these steps to insert Sage CRM merge fields after the **TableStart:Labels** tag. Enter the name of the Sage CRM merge field in **Field name**.

5. In each subsequent cell, insert a Next field. To do this, select **Next** from **Field names**. Then copy the Sage CRM merge fields from the label placeholder you created earlier. To see the Next field, you must select **Show field codes instead of their values** in Word Advanced Options. Alternatively, click **ALT+F9**.
6. Insert a TableEnd:Labels tag after the Sage CRM merge fields you entered in the rightmost cell.

<table>
<thead>
<tr>
<th><a href="">TableStart:Labels</a></th>
<th>{NEXT}</th>
</tr>
</thead>
<tbody>
<tr>
<td>«pers_salutation» «pers_firstname» «pers_lastname» «comp_name» «comp_emailaddress»</td>
<td>«pers_salutation» «pers_firstname» «pers_lastname» «comp_name» «comp_emailaddress»</td>
</tr>
<tr>
<td><a href="">TableEnd:Labels</a></td>
<td></td>
</tr>
</tbody>
</table>

Sample Labels Template

7. Save the template in .DOCX format and upload it. For more information, see Uploading a template.

8. To preview the merge document, open a customer record and click Documents | Merge to Word or Merge to PDF, and click the template link. If your System Administrator has disabled the Merge to Word option, Merge to Word isn't displayed.

## Uploading a template

You can upload new Word (.DOCX) or HTML (.HTM or .HTML) templates and make them available to users.

1. Click <My Profile> | Administration | Email and Documents | Document Templates.
2. Click Add File.
   - In IE, click Browse to navigate to the file.
   - In other browsers, select the file from its current location. When using Safari, you can add only one file at a time.
   - The file is listed in File(s). A green check mark indicates that it was uploaded. A red cross indicates that it wasn't uploaded. To upload successfully, a file must comply with the system file size, type, and number of files settings that you've specified.
4. Enter the template details and click Save. Uploaded templates are saved as Shared Templates. Users can access the new document template when carrying out a mail merge. If you're uploading an HTML template that you've created in Sage CRM, the filename is the same but with a figure in parentheses after it, unless you rename it locally first.

The table below describes the fields on the Shared Template Details page.
**Field** | **Description**
--- | ---
**Type** | Template type. For example, Letter or Report. If you are uploading a quote or order template, you must set the Type to Quote or Order.
**Category** | Area of business that the template is relevant for. For example, Sales or Finance.
**Owner** | Owner or author of the template. Select from a list of Sage CRM users.
**Team** | This field filters the template based on the user’s primary team or display team. If you set this to --None--, then there is no Team filter, and the template is available to all users, regardless of their team.
**Status** | Status of template. For example, Draft or Final.
**Language** | Language of the template.
**Active** | Set to Yes or No. Set to No, the template is not available for selection by users, but it is still available in <My Profile> | Administration | Email and Documents | Document Templates.
**Entity** | Context in which the template should be available. For example, when carrying out a mail merge in the context of an Opportunity, the user sees all templates, which their team has access to, and where the Entity is set to Opportunity. Set to None, the template will be unavailable to users.
**Description** | A short description of the template. It is worthwhile completing this field, because it will help users select the template most relevant to the task they are completing.
**File** | Browse to the location of, and select the template (IE only).

## Editing a template

You can change Word templates that are in the Shared Templates list. The way you do this depends on the browser you’re using.

Regardless of browser, you must

- Add new merge fields using Quick Parts.
  - Click **Insert | Quick Parts | Field**.
  - Select **MergeField** from **Field names**.
    - Enter the name of the Sage CRM merge field in **Field name**. For example, comp_name.
- Use TableStart and TableEnd tags for nested items in Quote or Order templates. To include a table with nested (child) item merge fields, insert start and end tags for the main table and the child table. For example, Quotes and Quote Items. You must also include a TableStart and TableEnd tag in the same template section, table row or table cell. For example, if you want to display a row of order item
data, the first column in that row must include a TableStart:OrderItems tag, and the final column must include a TableEnd:OrderItems tag.

- When creating a mail merge using opportunity merge fields you must include TableStart and TableEnd tags even if you don't use nested items. If you don't include these tags, the merge fails with no errors given.
- Remove column, section, or page breaks from the MS Word document.

Changing a Word template (all browsers)

1. Click <My Profile> | Administration | Email and Documents | Document Templates
2. Click the template link.
3. Click View Attachment to open the Word template and save it on your local machine.
4. Make your changes to the template. Make a note of the template details, return to Sage CRM and click Delete to delete the existing template.
5. Select Add File and browse to the template file.
   - In IE, use Browse to navigate to the file.
   - In other browsers, select the image file from its current location. When using Safari, you can add only one file at a time.
   - The file is listed in File(s). A green check mark indicates that it was uploaded. A red cross indicates that it wasn't uploaded.
   - To upload successfully, the files must comply with the system file size, type, and number of files settings. These are defined by your System Administrator.
6. Enter the template details and click Save. Users can access the updated shared document template.

Changing a Word template (IE only)

You can change a Word document template if you're working with IE and using the Active X Plugin. Enable the Active X Plugin in <My Profile> | Administration | Email and Documents | Documents and Reports Configuration.

1. Click <My Profile> | Administration | Email and Documents | Document Templates.
2. Click the template link.
3. Select Draft from Status and click Save.
4. Click the template link and click Edit Attachment.
5. Make your changes to the Word template, then save and close it.
6. In Sage CRM, select Final from Status.
7. Click Save. Users can access the updated shared document template.
Deleting a template

1. Click <My Profile> | Administration | Email and Documents | Document Templates.
2. Click the template link.
3. Click Delete and click Confirm Delete.

Alternatively

1. Open the record with which the template is associated.
2. Click the Documents tab and click Start Mail Merge.
3. Click the template link.
4. Click Delete.

Troubleshooting templates

- **Quote or order mail merge error.** Errors can occur when performing a mail merge from a Quote or Order where the Opportunity hasn't been assigned to a Company and Person. The template contains merge fields from the Company and Person entity, but the Opportunity doesn't contain the required information. To resolve any problems, select a Company and Person for the Opportunity.

- **Custom merge field error.** An error can occur when a custom merge field is detected in the template but can't be found in the mail merge view. To prevent this error from occurring, add any custom merge fields to the view that are used in the mail merge. For more information, see Editing a view.

Document and report settings

1. Click <My Profile> | Administration | Email and Documents | Documents and Reports Configuration.
2. Click Change.
3. Complete the fields on the Document / Reports settings screen. The fields are explained in the table below.
4. Click Save.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Root Directory For Mail Merged Documents</td>
<td>The path to the directory that documents are stored in.</td>
</tr>
<tr>
<td>HTTP Alias For Physical Root Directory For Mail Merged Documents</td>
<td>This is set up in IIS. It should point to the physical root for mail-merged documents.</td>
</tr>
<tr>
<td>Default Document Templates Location For Mail Merge</td>
<td>The default path where the templates for mail merge are kept.</td>
</tr>
<tr>
<td>Root Directory For Reports</td>
<td>This is the physical directory where reports are saved on the server.</td>
</tr>
<tr>
<td>Reports Query Timeout</td>
<td>Specify the maximum amount of time, in seconds, you want Sage CRM to wait for a report to run before a timeout error is displayed.</td>
</tr>
<tr>
<td>Reports Build Timeout</td>
<td>Specify the maximum amount of time, in seconds, you want Sage CRM to wait for a report to build before a timeout error is displayed.</td>
</tr>
<tr>
<td>Reports Admin Override</td>
<td>There is a restriction in place on the size of reports anybody can run. Yes: Administrators can run any size report. No: The Desktop Size Limitation setting is taken into account when the report is run. If you regularly run large reports, set to No.</td>
</tr>
<tr>
<td>Reports Export Visible For Non Admin Users</td>
<td>Yes: All users can export reports to PDF or spread sheet format and view reports on-screen. No: Only a user with Info Manager or full Administrator rights can export reports to PDF or a spread sheet format. All users can continue to view reports on-screen. This setting relates to reports run from the Reports menu button and does not affect Summary Reports. Access to Summary Reports can be enabled/disabled from the Summary Reports Enabled setting.</td>
</tr>
<tr>
<td>Desktop Size Limitation (Kb)</td>
<td>The size limit in Kb of the report for desktop clients. It is an approximation, as it is counting the size of the XML and not the resulting HTML. This is to stop very large reports being run and taking all of the bandwidth, especially for dial-up clients. If you regularly run large reports, it is recommended that this is set to 60 MB (61 440 Kb). This setting must not exceed 120 MB (122 880 Kb).</td>
</tr>
<tr>
<td>PocketPC Size Limitation (Kb)</td>
<td>The size limit in Kb of the report for PocketPC clients. It is an approximation as it is counting the size of the XML and not the resulting HTML. This is to stop very large reports being run and taking all of the bandwidth, especially for dial-up clients.</td>
</tr>
<tr>
<td>Summary Reports Enabled</td>
<td>No: Summary Reports are no longer available in the system.</td>
</tr>
<tr>
<td>Document Sync Server</td>
<td>Name of server where documents are stored if different to Sage CRM.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HTTP Port</td>
<td>Same port as your Web server.</td>
</tr>
<tr>
<td>Stream Images From Memory</td>
<td>Whenever graphics, charts or organizational charts produce images. They would normally be saved to the server's hard disk before being relayed to the client. Enabling this option means that the image is instead retained in memory and streamed to the client without mechanically storing it on the hard disk first. This option is disabled by default.</td>
</tr>
<tr>
<td>ActiveX Viewer for Crystal Reports</td>
<td>There are two types of viewer for Crystal reports, ActiveX or HTML viewer. Select Yes if you are using the ActiveX viewer. Crystal is not currently supported by Sage CRM. This setting remains for backward compatibility for customers who are continuing to use unsupported versions of Crystal.</td>
</tr>
<tr>
<td>Crystal Reports Version</td>
<td>Select the version of Crystal reports installed on the Web server. This version of Crystal is not supported by SAP or by Sage CRM. This setting remains for backward compatibility for customers who are continuing to use unsupported versions of Crystal.</td>
</tr>
<tr>
<td>Crystal Reports Viewer Path</td>
<td>Location of virtual directory in IIS required for Crystal Viewer support. Crystal is not currently supported by Sage CRM. This setting remains for backward compatibility for customers who are continuing to use unsupported versions of Crystal.</td>
</tr>
<tr>
<td>Adobe Converter Path And Filename</td>
<td>This field allows the administrator to specify a different Adobe converter program. Specify the full path and file name of the Adobe converter program here.</td>
</tr>
<tr>
<td>Adobe Converter Parameter String</td>
<td>Parameters used when calling the Adobe converter program. The %1 and %2 are place holders for the source and destination file names and should not be removed. The -q means quiet mode, which tells the program not to display information messages. Error messages will still be displayed.</td>
</tr>
<tr>
<td>Report generator maximum memory (MB)</td>
<td>The maximum amount of memory you want to allocate to the report generation process. The default setting is 1024MB (1GB).</td>
</tr>
<tr>
<td>Number of Concurrent Processes</td>
<td>Set to 1, processes for mail merges and Excel report generation will be carried out sequentially. This setting can be increased to allow new processes to be started before the previous process has been completed – for example, so that one user’s mail merge will not delay another user’s Excel report output.</td>
</tr>
<tr>
<td>Impersonated User</td>
<td>The login ID of the administrator of the local machine, which Sage CRM can use to save files to the server. The impersonated user login ID and the impersonated user domain are required for a valid logon.</td>
</tr>
<tr>
<td>Impersonated User Domain</td>
<td>The domain of the impersonated user.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Impersonated User Password</td>
<td>The password of the impersonated user.</td>
</tr>
<tr>
<td>Export To File available on Search / Groups</td>
<td>Determines what users the <strong>Export To File action</strong> button is available to for search lists and groups. For example, set to <strong>Info Manager</strong>, only users with Administration rights of Info Manager or higher are able to use the <strong>Export To File action</strong> button.</td>
</tr>
<tr>
<td>Send Email available on Search / Groups</td>
<td>Determines what users the Send Email action button is available to for search lists and groups.</td>
</tr>
<tr>
<td>File Extension Restrictions</td>
<td>List the extensions of the file types, which will be blocked from being uploaded into Sage CRM. Separate by commas. For example: exe, asp, bat. The file extensions that you restrict apply to Document Drop only. The restrictions do not apply to email attachments.</td>
</tr>
<tr>
<td>File Size Limitation (Mb)</td>
<td>Select the size limit per file which can be uploaded when using the Add File feature.</td>
</tr>
<tr>
<td>File Upload Limitation</td>
<td>Set the limit on the total number of files <em>per upload</em> when using the Add File feature. For example, with the limit set to 10, a user can select up to 10 files to upload in a single transaction.</td>
</tr>
<tr>
<td>Allow ActiveX Document Drop</td>
<td>Set to <strong>Yes</strong> to allow users to work with the Document Drop and Edit Attachment features. Document Drop lets users drag and drop files onto a Document Drop icon in the <strong>Documents</strong> and <strong>Communications</strong> tabs. The <strong>Edit Attachment</strong> button is available on the Document Details panel if the document you are viewing has a Draft status. Both features require users to download an ActiveX plugin file, which is only supported in IE. The user is prompted to download the file the first time they view a page where the Document Drop feature can be accessed.</td>
</tr>
<tr>
<td>Max Mail Merge Memory (MB)</td>
<td>The maximum amount of memory you want to allocate to the mail merge process. The default setting is 1024MB (1GB).</td>
</tr>
<tr>
<td>Mail Merge Timeout</td>
<td>This is the timeout value in seconds, which is passed to the server-side process for a mail merge. If a mail merge takes longer than the number of seconds this is set to, the user receives a timeout error and the mail merge process stops. If users are frequently receiving timeout errors during mail merges, the system administrator can increase this value. The default value is 300 seconds (5 minutes).</td>
</tr>
</tbody>
</table>
Library Management

- Viewing the library size
- Library item types
- Deleting library items

Viewing the library size

Library Management provides a simple user interface to manage your library storage. It lets you view the storage limit for your Sage CRM system, and delete library items to improve your storage efficiency.

Click <My Profile> | Administration | Email and Documents | Library Management.

- The pipeline-style graphic displays library item types and the Sage CRM database size.
- Excess displays if you are currently exceeding your storage limit.

Library item types

<table>
<thead>
<tr>
<th>Library Item Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orphan Documents</td>
<td>Library items which used to be associated with entities (Communication, Company, Person, Opportunity, etc.). If the communication was deleted but the library item was not deleted, then the library item has no parent record, and cannot be accessed via the user interface. Deleting orphaned records should represent a &quot;quick win&quot; in terms of freeing up storage capacity.</td>
</tr>
<tr>
<td>Shared Documents</td>
<td>Documents which have been uploaded to My CRM</td>
</tr>
<tr>
<td>Document Templates</td>
<td>Templates which have been uploaded to &lt;My Profile&gt;</td>
</tr>
<tr>
<td>Global Library</td>
<td>Library items which are attached to entities (Communication, Company, Person, Opportunity etc.).</td>
</tr>
</tbody>
</table>
Deleting library items

1. Click <My Profile> | Administration | Email and Documents | Library Management | Library Management.

2. Select the items you want to delete from Library Items.
   - You can sort on any column to find and group related items.
   - Use View to filter the list by library item type.
   - The checkbox in the table header beside File name selects or deselects all library items matching the view filter, not just the library items displayed on the current page.

3. Click Delete. The library items are permanently deleted. The storage pipeline adjusts to show the updated storage capacity.
System configuration

- System settings
- Timings
- Themes
System settings

- Configuring logging
- Configuring database settings
- Refreshing metadata
- Configuring system behavior
- Reviewing locks
- Configuring web services
- Configuring Quick Find
- Configuring Keyword Search
- Locking the system
- Configuring license key details
- Configuring proxy settings

Configuring logging

1. Click <My Profile> | Administration | System | Logging.
2. Click Change.
3. Complete the Logging fields.
4. Click Save.
5. Choose the log files that you want to view from Select log files.
   - Email Manager Logs includes feedback on successful and failed emails depending on what you specified when setting up Email Management. For more information, see Email Management Server Options.
   - .NET Logs. For more information, see the Developer Help on the Sage CRM Help Center.

Logging fields

The following table describes the Logging panel fields.
Field | Description
---|---
System Logging Level | Select the logging level you require in the Sage CRM System Log file, options range from "0 - Off" to "5 - Maximum". The log file, ewaresystem.log is stored in wwwroot\crm, and new files are created daily, which can be used for diagnosing problems.

SQL Logging Level | Specify the logging level you require in the SQL Log file. Options are Off; Errors only; and All queries over the threshold. The threshold is specified in the Query Duration Logging Threshold (Milliseconds) field. The log file, ewaresql.log, is stored in ...[installname]\logs, and new files are created daily, which list all the SQL being executed, how long it took (in milliseconds), and any errors that came back. Reviewing this file may prove easier than carrying out SQL traces.

Query Duration Logging Threshold (Milliseconds) | Specify the query's duration over which you want queries to be logged. When a query takes longer than this, the number of milliseconds it will be logged.

.NET Logging | Specify the level of .NET logging.

### Configuring database settings

Changes to database settings should be carried out with care by an experienced database administrator. Incorrect changes to the configuration may prevent Sage CRM from running. Changes to most of the fields result in automatic updates to Sage CRM's Java properties to ensure features dependent on these continue to work - for example the Interactive Dashboard and Exchange Integration. If the automatic update is not successful, a message is displayed on-screen.

1. Click **<My Profile> | Administration | System | Database**.
2. Click **Change**.
3. Complete the Database fields.
4. Click **Save**.

### Database fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database User ID</td>
<td>This is the user ID that is used to connect to the database. This user must be set up in SQL Server Enterprise manager.</td>
</tr>
<tr>
<td>Database Password</td>
<td>This is the password of the SQL Server user. Set up in SQL Server Enterprise manager.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Use Integrated Windows NT Security</td>
<td>If this is checked then the IUSR account is used to connect to the database. The Database User ID and the Database Password are ignored. This is for SQL Server only. The Administrator must ensure that IUSR is added as a user to SQL Server and enables access to the database.</td>
</tr>
<tr>
<td>Default Database Driver</td>
<td>Sets the type of driver you are connecting to using MDAC.</td>
</tr>
<tr>
<td>Default Database Server (SQL Server Only)</td>
<td>Indicates the name of the server where the default SQL database is located.</td>
</tr>
<tr>
<td>Default Database</td>
<td>This is the name of the database on your database server.</td>
</tr>
<tr>
<td>Always Use Default Database</td>
<td>Set to Yes, the logon page prompts the user for user name and password. &quot;Yes&quot; is the mandatory setting for production environments. Set to No, the logon page prompts the user for user name, password, and the database name. An IIS reset is required before an alternative database can be logged onto. &quot;No&quot; is strictly for use in a development environment only.</td>
</tr>
<tr>
<td>Query Timeout (sec)</td>
<td>The maximum amount of time that a query is allowed run on the database server before a timeout error is displayed in Sage CRM.</td>
</tr>
<tr>
<td>Port Number</td>
<td>SQL Server port number added during the install - default is 1433.</td>
</tr>
<tr>
<td>CRM Server Addresses</td>
<td>Available for multi-server Sage CRM installs only. Must be filled in with a semi-colon separated list of the IP addresses of the distributed servers.</td>
</tr>
</tbody>
</table>

**Refreshing metadata**

1. Click <My Profile> | Administration | System | Metadata.
2. Select the items you want to refresh.
3. Click Execute Refresh.

**Configuring system behavior**

1. Click <My Profile> | Administration | System | System Behavior.
2. Click Change.
3. Complete the System behavior fields.
4. Click Save.
## System behavior fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Companies</td>
<td>Specifies whether companies are used in the application.</td>
</tr>
<tr>
<td>Use Individuals</td>
<td>Specifies whether individuals are used in the application.</td>
</tr>
<tr>
<td>Use Country Code</td>
<td>Specifies whether country codes are displayed in the application.</td>
</tr>
<tr>
<td>Use Area Code</td>
<td>Specifies whether area codes are displayed in the application.</td>
</tr>
<tr>
<td>Default Language</td>
<td>The default language of the Logon screen and the default language set for new users added in `&lt;My Profile&gt;</td>
</tr>
<tr>
<td>Deduplication</td>
<td>When set to Yes, deduplication functionality is enabled.</td>
</tr>
<tr>
<td>Use Opportunity Items</td>
<td>Select from Opportunity Items or Quotes and Orders. Quotes and Orders enables the full product management feature, and the Quotes and Orders tabs within Opportunities. This setting is available only if you've upgraded from a previous version of Sage CRM. If you're using a newer version of Sage CRM, Opportunity Items has been automatically replaced by the Quotes and Orders product functionality and Use Opportunity Items settings aren't available.</td>
</tr>
<tr>
<td>Maximum Number Of Occurrences</td>
<td>Upper limit for task or meeting creation using the Recurring Communications feature.</td>
</tr>
<tr>
<td>Home Page URL</td>
<td>Displays a new button on the menu with a link to the URL.</td>
</tr>
<tr>
<td>Server Time Zone</td>
<td>Time zone of the server. There are 75 time zones to select from. The one you select defines what daylight settings are used, so you must be careful in selecting the correct zone. The zone selected must correspond exactly to the server setting. Therefore, you must stop and restart IIS if you change the time zone in Sage CRM.</td>
</tr>
<tr>
<td>Communication Refresh Interval</td>
<td>The refresh rate in seconds for the Calendar list. It is disabled when set to zero.</td>
</tr>
<tr>
<td>Opportunity Refresh Interval</td>
<td>The refresh rate in seconds for the Opportunity My CRM list. It is disabled when set to zero.</td>
</tr>
<tr>
<td>Case Refresh Interval</td>
<td>The refresh rate in seconds for the Case My CRM list. It is disabled when set to zero.</td>
</tr>
<tr>
<td>Show Pipeline For Company/People</td>
<td>When set to Yes, users can see the opportunity and case pipeline from the company and person level. The option is typically set to No to prevent other users from viewing their colleagues’ forecasting information.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Company Notes Tab Shows</td>
<td>Select from Company And Person Notes, or Company Notes Only. The default setting is Company And Person Notes. This means that a note added in the context of a person is also displayed on the Company Notes tab. If you want notes added in the context of a person to only display in the context of a person, select Company Notes Only.</td>
</tr>
<tr>
<td>Allow Coaching in CRM</td>
<td>Specify whether to make on-screen coaching available to users.</td>
</tr>
<tr>
<td>Allow Mass Update And Update Territory</td>
<td>Specify whether to make the mass update and update territory functionality available to users.</td>
</tr>
<tr>
<td>Analytics</td>
<td>Web analytics tracks how users interact with Sage CRM and the device they use to view the system but doesn't collect any personal data. This information is used to improve Sage CRM. You can turn analytics on or off.</td>
</tr>
<tr>
<td>Use Exchange Server Integration</td>
<td>Set to Yes to enable Exchange Server Integration. For more information, see Enabling Exchange Integration. Once this is set to Yes, it is not recommended to switch it back to No (which re-enables Classic Outlook Integration) unless under guidance from a Sage CRM support professional.</td>
</tr>
<tr>
<td>Recent List Length</td>
<td>Specify the size of the Recent List. The maximum length is 40.</td>
</tr>
<tr>
<td>Search Select Advanced Fields Grid Size</td>
<td>Specify the size of Search Select Advanced lists.</td>
</tr>
<tr>
<td>Default System Theme</td>
<td>Specify the default system theme. This is the default theme applied when a new user is added to the system. It is also the theme applied if the user clicks Set To System Defaults in &lt;My Profile&gt;</td>
</tr>
<tr>
<td></td>
<td>On a new installation of Sage CRM, only the Contemporary theme is available. When you upgrade Sage CRM, all themes that existed in the previous version of the product remain available in the new Sage CRM version.</td>
</tr>
<tr>
<td>Default CSV File Export Delimiter</td>
<td>Set the delimiter to comma, semi-colon, or tab. When you use the Export To File button on, for example, the results of a company search, the CSV export will use the delimiter you have set. This makes for easier conversion to suit your native version of MS Excel. Users can override this setting by selecting their preferred CSV File Export Delimiter in &lt;My Profile&gt;</td>
</tr>
</tbody>
</table>
### Field Description

**Use local help files**
Select which help files are displayed to users and system administrators when they click the Help button. Possible values:

- **Yes.** Displays help files installed on the Sage CRM server.
- **No.** Displays help files hosted on dedicated web servers. When this value is selected, the computers from which users and system administrators access help files must be connected to the Internet.

This field is available only when help files are installed on your Sage CRM server. For more information, see [Installing help files locally](#).

**User Rights To See System Expiry Warning**
If your license includes the System Expiry option, you can choose the level of user who will see the expiry warning message. If No Admin Rights is selected, all users see the warning message. If Info Manager is selected, Info Managers and Administrators see the message. If System Admin is selected, only Administrators see the message.
The message is displayed after each logon when the expiry date is within thirty days or less.

**Allow Mail Merge to Word**
Allows users to perform mail merges that create Microsoft Word documents and also to perform mail merges that create PDFs. If **Allow Mail Merge to Word** is set to no, users can only perform mail merges that create PDFs.

### Reviewing locks

The system implements different levels of multi-user data handling to ensure each web request is handled securely, without any conflicts of data access and deadlock.

- Click **<My Profile> | Administration | System | Locks**. A list of the locks that the system is currently handling is displayed. There are three levels of locking:
  - A session lock is created when a user logs in and is maintained during the login session. It uniquely identifies the connection that the user has with the server. Any request that the user makes requires identification of the session lock. A request includes clicking a button, a hyperlink, or a contact name. Identification of the session lock is handled automatically, as each button and hyperlink generated by the system has the session lock built in.
  - Table locks and record locks prevent more than one user updating the same data at the same time. Record locks create a unique identification of the record that a user is accessing.
  - Locks work with ASP pages in Sage CRM. If more than one user is accessing a record by standard functionality or an integrated ASP page, each user is notified that another user is currently editing the record. You can switch this off using the CheckLocks property. For more information, see the Developer Help on the [Sage CRM Help Center](#). When updating third
party databases using extensibility features, the database administrator must ensure that a third party application and Sage CRM cannot update the same record at the same time.

- Click a lock hyperlink to review the Record lock fields.
- To delete the lock, click Delete.

Record lock fields

The table below summarizes the information displayed for each record lock.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session Id</td>
<td>An identifier that indicates the session that's maintaining the lock.</td>
</tr>
<tr>
<td>Table Id</td>
<td>An identifier that indicates the table that's locked.</td>
</tr>
<tr>
<td>Table Name</td>
<td>The name of the table that's maintaining the lock.</td>
</tr>
<tr>
<td>Record Id</td>
<td>An identifier that indicates the record in the specified table that the lock is currently held on.</td>
</tr>
<tr>
<td>Created By</td>
<td>The user that the lock is held for.</td>
</tr>
<tr>
<td>Created Date</td>
<td>The date on which the lock was created.</td>
</tr>
</tbody>
</table>

Configuring web services

The Sage CRM web service API enables developers to manipulate records remotely with Simple Object Access Protocol (SOAP) over HTTP using XML. For more information, see the Developer Help on the Sage CRM Help Center.

1. Click <My Profile> | Administration | System | Web Services.
2. Click Change to change the settings.
3. Change the Web services fields.
4. Click Save.

Web services fields

The table below explains the fields on the Web Services page.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Number Of Records To Return</td>
<td>The maximum number of records you want Web Services to return at one time. This limits the response sizes of requests. Pagination is available, so additional data can still be returned.</td>
</tr>
<tr>
<td>Maximum Size Of Request</td>
<td>The maximum number of characters you want users to be able to send to Web Services.</td>
</tr>
<tr>
<td>Make WSDL Available To All</td>
<td>When set to Yes, the WSDL file can be viewed by anyone from: <a href="http://CRMservername/CRMinstallname/eWare.dll/webservices/CRMwebservice.wsdl">http://CRMservername/CRMinstallname/eWare.dll/webservices/CRMwebservice.wsdl</a>. Users do not need to be logged in to view the file.</td>
</tr>
<tr>
<td>Enable Web Services</td>
<td>Set to Yes to enable the Web Services functionality. Set to No to disable Web Services. This setting overrides the Web Services setting on the External Access tab on individual entities. Please refer to Changing external access settings for more information.</td>
</tr>
<tr>
<td>Dropdown Fields As Strings In WSDL File</td>
<td>Default is No. Drop-down fields are displayed in the WSDL as enumerated types, for example comp_status as an enumeration with the drop down values in it. When set to Yes, makes the enumerated types &quot;Strings&quot;. This means that, for example, within Company there is a field called status that is of type com_type. When this Option is set to Yes, it is still called status but its type is now &quot;String&quot;.</td>
</tr>
<tr>
<td>Send and Return All Dates and Times in Universal Time</td>
<td>Use UTC (standard for Coordinated Universal Time) timing and format for display of times and dates.</td>
</tr>
<tr>
<td>Accept Web Request From IP Address</td>
<td>Specify the unique IP address that you want the WSDL file to be accessible from. When you do this, the Make Web Services Available To All field should be set to No.</td>
</tr>
<tr>
<td>Force Webservice Log On</td>
<td>If the connection between the web service client and the service is unexpectedly broken, that client remains logged on to the server hosting the service. This means that a new client session will be blocked from logging on to the server. However, if you set the <strong>Force Webservice Log On</strong> setting to Yes, the old instance of the client is automatically logged out when a new instance attempts to log on. By forcing new log ons, this field prevents users from being &quot;locked out&quot; of a web service following a failed connection or unsuccessful log out.</td>
</tr>
</tbody>
</table>
Configuring Quick Find

Quick Find allows users search for key terms across single-line text, email address, and URL fields on all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once. Quick Find gets data from the Quick Find service which runs as a background process. This service first builds an index of all database records and then periodically updates the index to track records that have been added or removed.

1. Click <My Profile> | Administration | System | Quick Find.
2. The current status of the Quick Find service is displayed in Quick Find service status.
   - The date and time of the last indexing of Sage CRM data is displayed in Last Quick Find index completed at.
   - To restart the Quick Find service, click Restart Quick Find. You might do this if the service has stopped or if the last indexing occurred more than 10 minutes ago. Restarting the service does not rebuild the index.
3. Click Change.
4. Select the entities that are indexed and included in Quick Find. You can exclude an entity from Quick Find to narrow the range of results, reduce the size of the index and RAM requirements, and shorten the time to return results. For information about indexing a custom entity, see Indexing a custom entity for Quick Find.
5. Click Save.

Note: You can exclude individual entity fields from Quick Find. For more information, see Editing a field.

Indexing a custom entity for Quick Find

To add a custom entity to the Quick Find index, you must add new SQL Server indexes on the _Deleted and _UpdatedDate fields, and include the ID field on the index. You can enable the PAD option to reduce fragmentation of the index over time.

The following example adds an index for a custom entity named Project.

```
CREATE NONCLUSTERED INDEX [IDX_QUICKFIND_Proj_Deleted_UpdatedDate]
ON [dbo].[Project]
(
    [Proj_Deleted] ASC,
    [Proj_UpdatedDate] ASC
)
INCLUDE
```
Configuring Keyword Search

Keyword Search allows users to search for keywords across specified primary entities. Users can include wildcard characters in a keyword search to search for a variety of text and characters.

1. Click <My Profile> | Administration | System | Keyword Search. The date and time of the last full indexing and incremental indexing of Sage CRM data is displayed.
   - A full index is undertaken when the CRM Indexer Service is started and compiled against all records in the database.
   - An incremental index includes records added to the database since the last indexing.
   - You can start and stop the CRM Indexer Service. For more information, see Starting and stopping CRM Indexer Service.
2. Click Change.
3. Change the Keyword Search system settings.
4. Click Save.

Tip: You can create a Keyword Search view for a custom entity or edit an existing Keyword Search view. For more information, see Creating a view for Keyword Search.

To extend Keyword Search to secondary entities, you can create a search screen. For more information, see Creating a screen in the Developer Help.
Keyword Search system settings

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Keyword Search In CRM</td>
<td>Select Yes to allow users to use Keyword Search.</td>
</tr>
<tr>
<td>Interval</td>
<td>Specify the gap, in minutes, between incremental indexes that track new records added to the database. Note that if the interval specified here has elapsed and an incremental index has not been compiled (because the actual service has been stopped, for example), the user of the keyword search will be warned that the tool is relying on out-of-date information.</td>
</tr>
<tr>
<td>Maximum Number of Results</td>
<td>Indicate the maximum number of records returned by the search. The figure cannot exceed 10,000.</td>
</tr>
</tbody>
</table>

Optimizing Keyword Search

Keyword Search can be impacted if you add large numbers of records to a primary entity. Some guidelines for optimizing Keyword Search in this situation are as follows:

- Remove unnecessary fields from Keyword Search views.
- Alternatively, create a new Find screen, based on a simple view containing only the fields you require.
- Ensure that your SQL database has proper indexes on the fields that are included in a Keyword Search view.
- Use a query analyzer tool (such as SQLs Dynamic Management Views) and a query optimizer tool for insight into using indexes to optimize performance.
- Test the large number of records and new indexes on a test server before implementing in production.
- Include a basic maintenance plan to rebuild indexes as part of your normal backup task.
- Configure Sage CRM to log any SQL statements that take longer than a specified time to complete, so you can test new indexes before performance becomes a problem.

Starting and stopping CRM Indexer Service

Keyword Search gets data from a Windows service, which is a system application that can be configured to start automatically. Running as a background process, this service first builds an index of all database records and then periodically updates the index to track records that have been added or removed. If you’re using a new Sage CRM installation, the Indexer Service starts automatically.

If Sage CRM is installed as an upgrade, you must manually start the Indexer Service using Microsoft Windows Services console. You manually start and stop the Indexer Service as follows:
1. In Windows, open the Control Panel.
2. Open Administrative Tools.
3. Click the Services icon. The Service console is displayed.
4. Right-click CRM Indexer Service and click the relevant start or stop option. Click Properties to define more advanced settings. For example, you can specify the startup type so the service starts automatically when the system starts.

**Note:** You should stop the Indexer Service if you disable Keyword Search.

### Limiting CRM Indexer Service logging

To limit the amount of logging performed by the CRM Indexer Service, you can remove old log file entries using a scheduled task.

For example, you can schedule the following command using the Windows Task Scheduler to delete all search index logs that are two days old:

```cmd
forfiles /P "C:\Program Files (x86)\Sage\CRM\Services\Logs" /D -2 /M *CRMSearchIndex.log /C "cmd /c del @file"
```

Alternatively, you can use a command line zip tool to archive old files using forfiles, and then delete them as necessary.

### Locking the system

This option provides a way to log all users except the System Administrator out of the system when essential maintenance tasks need to be carried out.

Before implementing a lockdown of the system, you should inform all users who might be affected of when the process will be initiated. When the locking process is complete, users still trying to interact with the system will discover that they have been logged out when they attempt to click a button that sends information to the server. Well-flagged notifications about temporary lockdowns of the system should stop users from losing data being entered through the interface.

Users cannot log back into the system until you unlock it or the maximum lockout period of three hours has elapsed.

**Note:** The only user who can release the lock on the system is the System Administrator who set the lock. If you have more than one user with Administration rights, they are locked out too.

1. Click `<My Profile> | Administration | System | Lock System`. The system can be locked when the icon displays as a closed padlock. The Lock System page is displayed, listing the number of users currently logged on. Ideally, there should be no users logged on if the System Administrator has provided sufficient notification of the process.
2. Click **Continue** to log off any logged on users.
3. Click **Continue** to lock the system.

**Unlocking the system**

1. Click **<My Profile> | Administration | System | Unlock System**. The system can be unlocked when the icon is displayed as an open padlock.
2. Click **Continue**.
3. Click **Continue**. The system is unlocked and users can log on.

**Configuring license key details**

1. Click **<My Profile> | Administration | System | License Key Details**.
2. Click **Change**.
3. Complete the **License key fields**.
4. Click **Save**.

**License key fields**

This option displays the current licensing options. All fields are read-only.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System License Type</td>
<td>Displays Named User Licensing or Concurrent User Licensing. Concurrent User Licensing is only displayed if your license includes the Logged On Users License Scheme (concurrent or mixed licensing) option.</td>
</tr>
<tr>
<td>Max Number of Concurrent Users</td>
<td>This field is only displayed if your license includes the Logged On Users License Scheme (concurrent or mixed licensing) option. This shows the number of users specified in license activation code.</td>
</tr>
<tr>
<td>Number of Named Users</td>
<td>This field is only displayed if your license includes the Logged On Users License Scheme (concurrent or mixed licensing) option. This shows the total number of users with a license type of Named. Please refer to <strong>User fields</strong> for more information on setting the license type for a user.</td>
</tr>
<tr>
<td>Max Number Of Users</td>
<td>Number of users specified in license activation code.</td>
</tr>
<tr>
<td>Number of Seats Available</td>
<td>Maximum number of users minus the Number of Active Users.</td>
</tr>
<tr>
<td>Number of Active Users</td>
<td>Number of users set up and enabled for use on the system. Resource, deleted or disabled users are not included in the total.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Date</td>
<td>Date and time the product was registered with Sage CRM. If the product has not yet been registered, follow the instructions in the Manual Registration section of the page.</td>
</tr>
<tr>
<td>Options</td>
<td>Product options specified in license activation code.</td>
</tr>
<tr>
<td>System Expiry Date</td>
<td>This field is only displayed if your license includes the System Expiry option. Displays the date when your system expires. No users can log on from this date onwards, and a new license key is required. A warning is displayed after each logon when the expiry date is within thirty days or less.</td>
</tr>
</tbody>
</table>

### Configuring proxy settings

Proxy Settings lets you set up a single generic user for proxy security for features requiring Internet access. For example, gadgets calling external Web addresses on the Interactive Dashboard.

1. Click `<My Profile> | Administration | System | Proxy Settings`. If you entered the Proxy details during the install process, the details are displayed here for editing.
2. Click Change.
3. Complete the Proxy settings.
4. Click Save.

### Proxy settings

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proxy Requires Authentication</td>
<td>Select if the proxy requires authentication</td>
</tr>
<tr>
<td>Proxy User Name</td>
<td>Proxy user name. This field is required if the first check box is selected.</td>
</tr>
<tr>
<td>Proxy Domain</td>
<td>Proxy domain. This field is required if the first check box is selected.</td>
</tr>
<tr>
<td>Proxy Address</td>
<td>Proxy address. This field is required if the first check box is selected.</td>
</tr>
<tr>
<td>Proxy Password</td>
<td>Proxy password.</td>
</tr>
<tr>
<td>Proxy Port</td>
<td>Proxy port.</td>
</tr>
</tbody>
</table>
Timings

- Working with Timings
- Business calendars
- Service Level Agreements

Working with Timings

The Timings functionality tracks the duration of a Lead, Opportunity, or a Case from when the record is opened to when it is closed. It also calculates the length of time a Lead, Opportunity, or Case spends at each stage along the way. If you open an existing Lead, Opportunity, or Case, you can review the Duration information from the Tracking tab.

For a more accurate measurement of duration, this information can be combined with a Business Calendar, which defines standard business days and work times. You can also define Holiday Sets for different regions, and set up Service Level Agreements (SLAs) which take Case Duration, Business Calendars, and Holiday Sets into account so that warnings and escalations can be triggered when a Case comes close to, or breaches a customer’s SLA.

Holiday Sets affect Case duration only, they have no impact on Lead or Opportunity duration.

Business calendars

- Creating a business calendar
- Recalculating lead and opportunity durations
- Standard Sage CRM business calendar
- Seven day week business calendar
- Creating a holiday set

Creating a business calendar

1. Click §My Profile§ | Administration | System | Timings | Business Calendar. The Business Calendar page is displayed showing the default business calendar.
2. Click New.
3. Enter a name for the calendar in Calendar.
4. Enter the total number of working hours in the company’s day in Total Working Hrs. This field is important for calculating how many hours make up one working day. Let’s say you operate from 9:00
to 1:00 on a Friday, and a case is logged at 9:00 on Friday morning. When you check the duration at 1:30, it's shown as four hours rather than one day. However, on Monday at 1:30 when a total of 8.5 working hours have elapsed, the duration is one day.

5. To set this Business Calendar as the default calendar used to measure elapsed time for leads and opportunities, select **Set As Default**. If another calendar has already been set as the default calendar, unselect **Default Calendar** before making another calendar the default.

6. For each day on the Week Day list, select the time at which the working day starts and the time at which the working day ends from **Day Start Time** and **Day End Time**.

7. Click **Save**.

### Recalculating lead and opportunity durations

When you set a Business Calendar to be the default Business Calendar, it is automatically used to measure elapsed time for all new leads and opportunities created in the system. There can be just one default Business Calendar at a given time, which ensures that all lead and opportunity time scales created during that time are measured according to the same criteria. Elapsed time is measured in days, hours, and minutes.

You can apply a Business Calendar and a Holiday Set to SLAs. The SLA can then be applied to individual cases or entire companies. When this is done, elapsed time for the case is measured according to the SLA to which the Business Calendar and the Holiday Set apply.

The default Business Calendar, Standard Working Week, is used to calculate lead and opportunity durations for any newly created leads or opportunities. If you change the default Business Calendar, or if you set a different Business Calendar to be the default calendar, you will probably want all existing opportunity and lead durations to be updated to reflect the changes in the Business Calendar.

To recalculate lead and opportunity durations:

1. Click **<My Profile> | Administration | System | Timings | Business Calendar**.
2. Click the hypertext link of the Business Calendar you updated or set as the new default calendar.
3. Click **Update Lead Records** to update all leads to reflect the new or changed calendar or click **Update Opportunity Records** to update all opportunities.

### Standard Sage CRM business calendar

This example shows elapsed time calculations for an opportunity that uses the calendar Standard Working Week as the default calendar. It consists of a five-day week, Monday to Friday. Work begins at 9:00 each day and ends at 17:30.

The opportunity goes through the following stages:

- Created on Tuesday, March 3rd at 9:00 AM.
- Progressed to stage Proposal Submitted on Tuesday, March 11th at 10:02 PM.
- Progressed to stage Negotiating on Wednesday September 19th at 17:20 PM.
When the opportunity is assigned the Standard Working Week calendar, the elapsed time between each stage of the opportunity is calculated based on that calendar.

You can view the elapsed time calculations when you open the Opportunity Summary page and select the Tracking tab and view the Duration column.

The first duration that has been calculated is 6 days, 7 hours and 17 minutes. This is the time from when the opportunity was created and to when it was progressed to Proposal Submitted. Although, the amount of days that elapsed between March 3rd and March 11th is 8 days, when the Standard Working Week calendar is taken into account (that is, five working days in the week), the elapsed time amounts to six days. In addition, hours and minutes are calculated.

Other durations have been calculated in the same way (the weekend is not counted because it is a five-day working week).

**Seven day week business calendar**

This example shows elapsed time calculations for an opportunity. The system’s default business calendar is called Seven Day Week. It consists of a seven-day week, Monday to Sunday. Work begins at 9:00 AM each day and ends at 17:30.

The opportunity goes through the following stages:

- Created on Tuesday, March 3rd at 9:00 AM.
- Progressed to stage Proposal Submitted on Tuesday, March 11th at 10:02 PM.
- Progressed to stage Negotiating on Wednesday September 19th at 17:20 PM.

When the opportunity is assigned the Seven Day Week calendar, the elapsed time between each stage of the opportunity is calculated based on that calendar.

You can view the elapsed time calculations when you open the Opportunity Summary page and select the Tracking tab and view the Duration column.

The first duration that has been calculated is 8 days, 7 hours and 17 minutes. This is the time between when the opportunity was created and when it was progressed to Proposal Submitted.

This time, the amount of days that elapsed between March 3rd and March 11th is 8 days, and the time calculated by the system is also 8 days. This is because the elapsed time scales are based on a seven-day working week (weekends are counted as working days). As you can see, hours and minutes are also calculated.

**Creating a holiday set**

When defining a holiday set you specify that certain days, such as federal holidays (in the United States) or Bank Holidays (in the United Kingdom and Ireland), can be excluded when calculating how long a Case has been open. For example, if a particular Thursday is designated a Thanksgiving holiday and a case was opened on the Monday of that week, by Friday of the same week the duration for the case will indicate that four days have elapsed rather than five.
1. Click <My Profile> | Administration | System | Timings and click the Holiday Set tab. The Available Holiday Sets page is displayed with a list of existing Holiday Sets.

2. Click New. Alternatively, to clone an existing holiday set, click the link of the Holiday Set and click Clone.

3. Type a name for the holiday set in Holiday Set.

4. Type the name of the public holiday you want to include in the company’s Holiday Set in Holiday Name.

5. Enter the date on which the holiday falls in Holiday Date.

6. Click Add. The holiday you added is displayed on the Existing Holidays panel and the Add New Holiday panel is available to add another new holiday to the Holiday Set.

7. Continue to add other holidays in the same way.

8. To remove an existing holiday, click Delete beside the holiday you want to remove.

9. Click Save. The Holiday Set you created is added to the list on the Available Holiday Sets page.

Service Level Agreements

- Setting up SLAs
- Adding escalation rules to SLAs
- Applying SLAs to companies and cases
- SLA warning flags
- Updating SLA records

Setting up SLAs

In Sage CRM, Service Level Agreements (SLAs) define the time frames in which customer cases should be resolved and the steps that should be taken to reach an appropriate solution. Typically, customers pay for different SLA agreements (Gold, Silver, Bronze, for example) depending on the level of service they require. Moreover, individual SLAs specify varying response times and actions to match the severity of the reported problem.

1. Click <My Profile> | Administration | System | Timings | Service Level Agreement. The list of current SLAs is displayed showing the default SLA, Gold. You can filter the list using the filter panel.

2. Click New.

3. On the Details panel, enter a name for the SLA. For example, Priority Customers.

4. Enter a percentage value in Warning Percent. This figure represents the point in time at which you want the Case to be flagged in a certain way. The point in time is based on the percentage complete of the Case in the time frame specified in the SLA.

   For example, let’s say the Warning Percent specified in the SLA is 80%, and you specified in the SLA that all Cases should be closed within 30 hours. As a result, if a Case to which that SLA is assigned has not been closed within 24 hours, the Case is flagged accordingly.
5. To set the SLA as the default, select Default SLA. If another SLA is already specified as the default SLA, unselect it first because only one SLA can be specified as the default SLA at a given time. If SLA default is set and you create a new company, the SLA field is automatically set with default SLA. The is also true for cases except when parent company have SLA set (even if it is none then case SLA will also be none).

6. The Default SLA is used for new companies, which haven't been assigned an SLA. New cases default to the Company SLA even if it's set to "--None--". If you change the SLA on the company record, existing associated case SLAs don't change. The new or changed company SLA is only applied to new cases.

7. Select a Business Calendar and a Holiday Set to apply to the SLA.

8. For High, Low, and Medium priority Cases, specify the total amount of hours the Case should be closed in, in Close In.

9. From the SLA Timings in Hours panel, specify the number of hours that each stage of the Case should be closed by in Action. Do this for High, Low and Medium priority Cases. The Number of Action fields available depends on the number specified in <My Profile> | Administration | Advanced Customization | Workflow & Escalation Configuration | Maximum SLA actions.

10. Click Save.

Adding escalation rules to SLAs

Once an SLA has been set up and saved, you can add escalation rules to the SLA actions. A new escalation rule for SLAs is now available that can be set up to display a notification to the current assigned user if the Case is not progressed within the time specified in the SLA.

1. Click <My Profile> | Administration | System | Timings | Service Level Agreement.

2. Click the SLA hyperlink.

3. Click the action hyperlink. A dialog box is displayed to confirm that you want to add the rule.

4. Click OK. The new Workflow Rule page is displayed with the new SLA escalation rule. All fields are automatically completed, and the rule name is automatically generated according to the action number and severity you are creating the rule for.

5. Click Save. The escalation rule is applied to the SLA.

You can add a notification action to the escalation rule from the current Escalation Rule tab. You must ensure the table is set to escalations and that the time column is escl_datetime. For more information, see Workflow and Quick notifications and escalations for more information.

6. Edit the SQL script in Trigger SQL Clause if required. The default SQL sends a notification to the assigned user if the case is not progressed within the time specified in the SLA action. For example, you can add additional conditions or remove the assigned user.

7. Click Save.

Applying SLAs to companies and cases

Cases created for a company before that organization’s SLA is specified are not updated automatically. You can, however, open old cases and apply the company’s SLA to the case. After you specify an SLA for a
company, all cases defined from then on are automatically assigned the organization’s SLA. You can also override these automatic settings.

To apply an SLA to a company:

1. Open the Summary page of the company you want to apply the SLA to, and click **Change**.
2. Select the SLA from **SLA**.
3. Click **Save**. All cases associated with the company, whether they are high, low, or medium priority, are associated with the selected SLA.

If you decide that certain types of cases logged by this company shouldn't be associated with this SLA, apply a different SLA to individual cases. You can do this when creating a new or editing an existing case for the company. If the SLA for a company is changed afterwards, the SLA for existing cases with the company is not automatically updated. However, the SLA field on any new cases created for that company automatically default to the company’s new SLA field.

To apply an SLA to a new case:

1. In the context of a Company, click the **Cases** tab and click **New Cases**.
2. Enter the case details. Do not enter anything in **SLA** and **SLA Severity**. The system completes these fields if you’ve selected an SLA for the company.
3. Click **Save**.

**SLA warning flags**

Once SLAs are set up, all cases in a user’s list of current cases are flagged based on the Warning percent you specified in the SLA. The flag is included on the SLA Status column.

- A green symbol with a check mark indicates that the case is within the time specified in the SLA, it has not yet reached the warning percentage level, or that no Warning percentage has been specified in the SLA.
- A yellow symbol with a minus sign indicates that the case has reached the warning percent level without being closed.
- A red symbol with a cross symbol means that the case has not been closed within the time specified in the SLA.

If you make a change to an SLA’s timings in the SLA Timings In Hours panel, flags for cases associated with the SLA may be affected—in fact, the way in which the flag is determined will change, but the flag itself may not necessarily change color immediately.

You may want to update SLA timings if, for example, you have a number of cases attached to an SLA but at a later date agree with a customer that you will solve high-priority cases in a shorter length of time than was agreed on initially.
Updating SLA records

1. Click <My Profile> | Administration | System | Timings | Service Level Agreement.
2. Click the SLA you want to change.
3. Click Change and make your changes. For example, set Close In for high-priority cases to 9 hours, and set Action 1 for high-priority cases to 1.
4. Click Save.
5. Click Update SLA Records and click OK.

Themes

- Adding a new theme
- Making a new theme available
- Changing the default theme
- Customizing report charts

Adding a new theme

**Warning:** The steps in this section are for information only. Please be aware that customizations to the Contemporary theme or newly created themes are not supported.

To add a new theme, you must copy an existing theme and rename it. Never delete or change the Contemporary theme supplied with the install.

To hide an existing theme so users cannot select it, you must remove or rename the translation for the theme. For more information, see Making a new theme available and Translations list.

Changes to the supplied theme are overwritten on upgrade. Rework custom themes on a staging site before allowing users access to the upgraded system.

1. Navigate to the `WWWRoot\Themes` subdirectory of your Sage CRM install.
2. Copy an existing theme and rename it.
3. Create copies of all theme folders in the subdirectories of `WWWRoot\Themes`.
4. Review and edit the copied CSS in `WWWRoot\Themes`. The CSS contains comments to help you identify the areas you may want to change. Areas for review may include:
   - General color scheme changes. When updating the color scheme, it is recommended that instances of existing dark, mid, and light colors are replaced with equivalent shades of the new color. For example:
### Theme images

The following table describes some of the most frequently used images to review and replace for a new theme. The full set of images can be found in the \Img directory.

<table>
<thead>
<tr>
<th>Location</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logos</td>
<td>EWARETOPLEFT.JPG</td>
</tr>
<tr>
<td></td>
<td>TOP.JPG</td>
</tr>
<tr>
<td>Tabs</td>
<td>TABONLEFT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABOFFLEFT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABONREPEAT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABOFFREPEAT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABONRIGHT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABOFFRIGHT.GIF</td>
</tr>
<tr>
<td></td>
<td>TABSPACE.GIF</td>
</tr>
</tbody>
</table>
Making a new theme available

**Warning:** The steps in this section are for information only. Please be aware that customizations to the Contemporary theme or newly created themes are not supported.

To make a new theme available in Sage CRM, add a new translation where the Caption Family is CsThemes.

1. Click `<My Profile> | Administration | Customization | Translations`. For more information, see Translations and help.
2. Click New.
3. Enter a **Caption Code** for the new theme. For example, panoply_blue. The caption code must match the new theme name. For example, if your new stylesheet is called `PANOPLY_BLUE.CSS`, then the caption code is `panoply_blue`.
4. Enter `CssThemes` in Caption Family.
5. Enter `Tags` in Caption Family Type.
6. Enter the translations for the caption in the language fields. For example, Panoply Blue.
7. Click Save. You should empty your cache.

**Changing the default theme**

**Warning:** The steps in this section are for information only. Please be aware that customizations to the contemporary theme or newly created themes are not supported.

Online Help and Self Service are not affected by themes.

1. Click <My Profile> | Administration | System | System Behavior.
2. Click Change.
3. Select a theme from Default System Theme.
4. Click Save. The new theme is displayed next time you log on. If a user has selected a preferred theme, the preferred theme isn't overwritten.

**Customizing report charts**

FusionCharts improve the visual effect of charts in standard reports, on the interactive dashboard, and when using Chart Blocks. Features of the charts include rotation, slicing movement, and printing. You can customize FusionCharts. For example you can change the background color, or add shadow effects, background images, and logos to report charts.

- To customize FusionCharts, modify the [themename].FSN file in the Themes folder of your Sage CRM install. For more information, see [http://docs.fusioncharts.com/charts](http://docs.fusioncharts.com/charts).
- To change the background color of FusionCharts use bgColor and bgAlpha attributes.
  - **bgColor:** Sets the background color for the chart. You should use hex color codes without # symbols. To use a gradient fill, specify all the colors required for the gradient fill separated by commas.
  - **bgAlpha** Sets the alpha (transparency) for the background. The valid range is from 0-100.

- FusionWidgets allow Developers to create custom charts and elements for data visualization. The widgets can be found in ..\Program Files\Sage\CRM\[installname]\WWWRoot\fusioncharts. For more information, see [http://docs.fusioncharts.com/widgets](http://docs.fusioncharts.com/widgets).
- Adobe Flash Player (installed on the client and server machines) makes enhanced display options available in charts, such as greater depth of color. If Flash is not available, the charts are displayed using HTML 5. If you don't want to install Flash on the client, set ChartUseFlash to N in the Custom System Parameters table. This allows the display of static images only. More information is available on the [Sage CRM Community](http://www.sagecrmcommunity.com).
Mobile

- About Sage CRM mobile solutions
- Setting up Sage CRM mobile apps
- Setting up Sage CRM Mobile
About Sage CRM mobile solutions

Sage CRM mobile solutions include applications (apps) and UI themes that let you work with Sage CRM on a mobile device. For a list of features that are available in Sage CRM mobile solutions, see the Sage CRM Mobile Feature Matrix on the Sage CRM Help Center.

Sage CRM mobile apps, developed for specific devices and operating systems, give you online and offline access to Sage CRM by storing some Sage CRM data on your device.

There are three apps:

- Sage CRM for iPhone
- Sage CRM for Android™ (smartphone)
- Sage CRM Sales Tracker for Windows 8 (tablet) available for Sage CRM Professional

Sage CRM Mobile allows you to work online using a web browser on any mobile device, such as a smartphone or tablet. Each device has a string of text, called a user agent, that describes the device to Sage CRM. The user agent contains the version of browser and operating system that's on the device. Sage CRM interprets the user agent and based on mappings that you've set, it displays the associated UI theme on the mobile device. A UI theme is like a style sheet that defines how Sage CRM appears on a particular mobile device. There are two predefined themes. For more information, see Creating a new mobile theme.

- Smartphones and tablets map to the Sage CRM Mobile theme.
- IE mobile devices and Blackberries map to the Sage CRM Classic Mobile theme.

Setting up Sage CRM mobile apps

- Prerequisites for using Sage CRM mobile apps
- Enabling a user for Sage CRM mobile apps
- Customizing screens for Sage CRM mobile apps

Prerequisites for using Sage CRM mobile apps

Sage CRM server

- Sage CRM with a valid mobile license key must be installed. If a valid mobile license key is missing, Sage CRM displays a message that it's not licensed for mobile.
• Mobile device access must be enabled for users who want to use Sage CRM mobile apps. For more information, see Enabling a user for Sage CRM mobile apps.
• For iPhone and Android mobile apps, the person and opportunity screens should be customized as required. For more information, see Customizing screens for Sage CRM Mobile.

Mobile devices

• Must run an operating system supported by Sage CRM. For details, see the Software Support Matrix on the Sage CRM Help Center.
• Must be connected to your corporate network or the Internet. We recommend a strong wireless network connection for downloading large amounts of data to the Sage CRM mobile app.

Enabling a user for Sage CRM mobile apps

1. In Sage CRM, go to <My Profile> | Administration | Users | Users.
2. Enter the user’s last name and click Find.
3. In search results, click the last name of the user you want to enable for mobile apps.
4. Click Change.
5. Set Mobile Device Access to True.
7. Click Save.

Customizing screens for Sage CRM mobile apps

You can customize person and opportunity screens for Sage CRM mobile apps.

If you add too many fields to a small screen, it may look crowded and be difficult for users to work with.

1. Add new fields in Sage CRM:
   a. Go to <My Profile> | Administration | Customization | Person or Opportunity.
   b. Click the Screens tab.
   c. To add fields to the person summary screen, click PersonMobileExtra.
      To add fields to the opportunity summary screen, click OpportunityMobileExtra.
   d. Add the new fields and click Save.
2. Check the new fields in the mobile app:
   a. Log on to the Sage CRM mobile app.
   b. Tap Contacts or Opportunities.
   c. Tap the person or opportunity record.
   d. Tap the green arrow (�) at the top of the screen to open the customized summary screen and see the new fields.
Setting up Sage CRM Mobile

- Prerequisites for Sage CRM Mobile
- URLs for accessing Sage CRM Mobile
- Enabling a user for Sage CRM Mobile
- Mapping a user agent
- Defining a user agent
- Creating a new mobile theme
- Customizing screens for Sage CRM Mobile
- Customizing a classic dashboard
- Making entities read-only
- Setting a default tablet view

Prerequisites for Sage CRM Mobile

Sage CRM server

- Sage CRM 7.2 or later with a valid mobile license key must be installed. If a valid mobile license key is missing, Sage CRM displays a message that it's not licensed for mobile.
- Configured access URLs for mobile users, so that they could access Sage CRM from inside and outside your corporate network. Make sure the users know the URLs they need to use.
- Mobile device access must be enabled for users who want to use Sage CRM Mobile. For more information, see Enabling a user for Sage CRM Mobile.
- User agents must be mapped to the appropriate UI themes (devices). For more information, see Mapping a user agent.
- Screens for Sage CRM Mobile should be customized as required. For more information, see Customizing screens for Sage CRM Mobile. The Classic dashboard, if it's available, should be customized for improved viewing on mobile devices.

If Classic Outlook Integration or Exchange Integration is configured in Sage CRM, updates are reflected in the tasks, appointments, and contacts accessed using Sage CRM Mobile on most devices.

Mobile devices

Must be connected to your corporate network or the Internet.

Firewall
If a firewall is used in your organization, ensure that it allows traffic directed to the Sage CRM server via the Internet. For more information about server security, see the *Installation and Upgrade Guide* posted on the Sage CRM Help Center.

**URLs for accessing Sage CRM Mobile**

Your network administrator must set up URLs for all mobile users so they can access Sage CRM Mobile from inside or outside the corporate network.

- The URL for accessing Sage CRM from inside the corporate network is the same as the URL for accessing Sage CRM from your desktop and is typically in the format `http://yourserver/yourapp`.
- The URL for accessing Sage CRM from outside the corporate network typically includes your company’s IP address or domain name. The URL is normally in the format `http://companyipaddress/yourapp`.

**Enabling a user for Sage CRM Mobile**

1. In Sage CRM, go to *<My Profile> | Administration | Users | Users*.
2. Enter the user’s last name and click *Find*.
3. In search results, click the last name of the user you want to enable for Sage CRM Mobile.
4. Click *Change*.
5. Set *Mobile Device Access* to *True*.
6. Click *Save*.

**Mapping a user agent**

In most cases, Sage CRM automatically maps each user agent to a UI theme. However, if a user agent is not automatically mapped to a UI theme, you must configure the mapping manually:

1. In Sage CRM, go to *<My Profile> | Administration | Advanced Customization | Devices*.
2. Click *View unassigned user agents*.
3. Under *User Agents*, click the user agent you want to map.
4. Under *Devices*, click the device (UI theme) to which you want to map the user agent.
5. Click *Save*. 
Defining a user agent

If you want to map a new user agent that's not yet listed in Sage CRM, you must first define the user agent and then map it to the most appropriate UI theme.

When a new device attempts to connect to Sage CRM, it sends its user agent and Sage CRM adds it to the list of defined user agents if it isn't already included. But suppose you don't yet have the device; each of your users will get one next month, and you need to configure Sage CRM in preparation. Because the device can't send its user agent, you must obtain the user agent from the Internet and enter it into Sage CRM.

1. In Sage CRM, go to <My Profile> | Administration | Advanced Customization | Devices.
2. Click the UI theme to which you want to map the user agent.
3. Enter the user agent in Type a new user agent, then click add.
4. Click Add. The user agent is mapped to the UI theme (device).

Creating a new mobile theme

In Sage CRM, there are two predefined Sage CRM mobile themes. A mobile theme is called a device in the Sage CRM UI.

- Smartphones and tablets map to the Sage CRM Mobile theme.
- IE mobile devices and Blackberries map to the Sage CRM Classic Mobile theme.

You can create a new theme by modifying an existing theme (device). For example, you might want to create an iOS theme and map all user agents for old versions of iOS to it.

1. In Sage CRM, go to <My Profile> | Administration | Advanced Customization | Devices.
2. Click the theme (device) you want to modify.
3. Complete the following Device fields, and then click Save:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Description</td>
<td>Enter the theme description for system administrators.</td>
</tr>
<tr>
<td>User Description</td>
<td>Enter the theme description to be displayed to the users in the Sage CRM user interface.</td>
</tr>
</tbody>
</table>
### Field Description

**XSL File Name**  Enter the name of the Extensible Stylesheet Language (XSL) transformation file that converts Sage CRM output to a format compatible with the mobile device. For each device, a set of files is created in a folder in one of the following locations:

- **On a 32-bit system:**
  
  `%ProgramFiles%\Sage\CRM\<InstallName>\WWWRoot\Themes\XSL`

- **On a 64-bit system:**
  
  `%ProgramFiles%\(x86)\Sage\CRM\<InstallName>\WWWRoot\Themes\XSL`

**Based On Device**  Specifies the existing theme (device) on which the new theme is based. Use this list only if the device is not present in the Devices list located in `<My Profile> | Administration | Customization | <Entity> | Screens`.

**HTTP Accepts**  Specifies the unique markup language used by the target device.

**HTTP Content Type**  Specifies the markup language used by Sage CRM to reply to the device.

**Supports HTML Frames**  Specifies whether the device supports HTML frames.

**Device Image Extension**  Specifies the image file name extension to use with the device. For example, .jpg, .gif, .png.

**Device Code Page**  Specifies the character set to use with the device. For example, shiftjis or UTF-8.

**Device Max Rows**  Specifies the maximum number of rows that can appear in a grid.

**Device CSS File**  Specifies the Cascading Style Sheets (CSS) file to associate with the device.

**Browser Type**  Specifies the browser type supported by the device. HTML 4 delivers the normal desktop UI to the device. If you want Sage CRM to assign a browser type, choose **Other**.

---

## Customizing screens for Sage CRM Mobile

You can customize mobile screens, lists, and tabs for Sage CRM Mobile. Ensure that the customized UI is optimized for the smaller screen size of many mobile devices. If you add too many fields to a screen, it may look crowded and be difficult for users to work with. Before you begin customizing, you must select the correct device type.

The only supported actions on mobile are **runtabgroup** and **runblock**.

The following example adds a Company ID field to link a communication with a company on Sage CRM Mobile.
1. In Sage CRM, go to <My Profile> | Administration | Customization | Communication.
2. Click the Screens tab.
3. From Devices, select the mobile theme.
4. In the Screen Caption column, click Custom Communication Detail Box.
5. From Field, select Comm_Link : Company and click Add.
6. Click Save.
7. Log in to Sage CRM using a mobile device and browse to New | Communication to see the new field.

### Customizing a classic dashboard

**Note:** Classic dashboards are available for upgrade customers only.

You can modify a classic dashboard for Sage CRM Mobile. For example, you might want to limit the content available to mobile users. First, you must make a classic dashboard available to mobile users. You can then create or modify a classic dashboard in the usual way.

To make a classic dashboard available to mobile users:

1. In Sage CRM, go to My CRM | Dashboard | Go To The Classic Dashboard.
2. From Dashboard, select a classic dashboard.
3. Click Edit Dashboard Details.
4. Select Set As Mobile Dashboard and click Save.

You can make specific dashboard blocks available to mobile users on their classic dashboards. The Extensibility Module is required for block customization.

To make a specific dashboard block available to mobile users:

1. In Sage CRM, go to <My Profile> | Administration | Customization | <Entity> | Blocks.
2. In the Block Name column, click the block you want to enable for mobile users.
3. Select Available To Mobile and click Save.

### Making entities read-only

You can make companies, people, cases, opportunities and leads read-only on mobile devices. You might do this if a workflow that's configured on the entity would be affected by an update from a mobile device.

1. Use a text editor such as Notepad to open this JavaScript file:
   <Sage CRM Installation Folder>\WWWRoot\SmartPhone\sageiphone.js
2. Update the values in the Start Configurable Section. The accepted values are true or false.

/*****************************/
* Start Configurable Section

/*****************************/

// set to false if you do not want users to be able to change opportunities
var updateOpportunities = true;

// set to false if you do not want users to be able to change cases
var updateCases = true;

// set to false if you do not want users to be able to change leads
var updateLeads = false;

// set to false if you do not want users to be able to change companies
var updateCompanies = true;

// set to false if you do not want users to be able to change people
var updatePeople = true;

/*****************************/

* End Configurable Section

/*****************************/

Setting a default tablet view

There are two Sage CRM views available for a tablet:

- **Tablet view.** Displays Sage CRM optimized for iPad or Android Tablets with 10" or 7" screens.
- **Desktop view.** Displays the same look and feel as Sage CRM on Desktop. The Desktop view uses the Sage CRM fully featured UI.

To display the Interactive Dashboard on a tablet, you must use the Desktop view.

You can set a default tablet view for specific users.

1. In Sage CRM, go to `<My Profile> | Administration | Users | Users.`
2. Enter the user’s last name and click Find.
3. In the Last Name column, click the user for whom you want to set a default tablet view.
4. Click the User Preferences tab.
5. Click Change.
7. Click Save. The selected view is displayed the next time the user logs on to Sage CRM from a tablet.
CTI

- Getting started with CTI
- Installing CTI
- Enabling and configuring CTI
- Converting a text field to a phone number
Getting started with CTI

- What is CTI?
- CTI network architecture
- Sage CRM CTI network integration
- Sage CRM CTI prerequisites
- Role of the telephony administrator

What is CTI?

Sage CRM CTI provides CTI-enabled users with telephony functionality from their desktops, via the Sage CRM interface. Users can select any hyperlinked telephone number in the system to call that number, and any incoming calls are matched with contacts in the Sage CRM system so that users can quickly view contact details while they talk, or even before they take the call.

Sage CRM requires a TAPI driver on the client machine in order to communicate with the Telephony Server. If you have a CSTA or TSAPI solution you will require a 3rd party TAPI client in order to integrate with Sage CRM.

CTI network architecture

The following section provides an overview of a typical CTI network environment's technical infrastructure. It also provides details of what hardware needs to be in place before the implementer goes on site.

The following are the main elements of a typical CTI network:

- A private PABX switch.
- A Telephony Server.
- A Telephony Network.
- A local area network (LAN) server.
- A LAN.

The PABX switch controls the events and messaging over the Telephony Network, and the LAN server handles the day-to-day user-based network activities. The Telephony Server is a PC-based server that has an interface to the PABX switch and an interface to the LAN. This is the bridge that integrates telephony functionality with software on a LAN.
Sage CRM CTI network integration

The following are additional elements in a Sage CRM CTI network:

- The Sage CRM CTI component installed on a server.
- The Sage CRM CTI browser plugin (this gets installed automatically).
- For TSAPI and CSTA CTI solutions, TAPI client software needs to be installed on all user machines who will work with Sage CRM CTI because Sage CRM is compatible only with TSAPI and CSTA systems that provide a TAPI driver. A TAPI driver must be present on the client machine in order for integration with TSAPI and CSTA systems to work.

The Sage CRM Server interacts with the Sage CRM CTI browser plugin, which in turn interacts with the Telephony Server. When Sage CRM CTI is enabled, every CTI enabled user of Sage CRM has access to the Sage CRM CTI browser plugin. All inbound and outbound telephony activities are received or created by this plugin. In addition, the Sage CRM CTI browser plugin calls the Sage CRM server for the screen pop-ups, which present the caller ID and Sage CRM contact information to the user.

The diagram below illustrates how Sage CRM integrates with a typical CTI network.

---

Sage CRM CTI prerequisites

Before an implementer goes on site, the following must be available to integrate Sage CRM with a CTI network:
• A Private Automatic Branch Exchange (PABX) switch. All TAPI-compliant PABX switches are compatible with Sage CRM.

• A Telephony Server that has been configured for all users who will use Sage CRM CTI. All the following telephony servers are compatible with Sage CRM:
  • TAPI
  • TSAPI
  • CSTA

**Note:** For TSAPI and CSTA CTI solutions, TAPI client software needs to be installed on all user machines who will work with Sage CRM CTI because Sage CRM is compatible only with TSAPI and CSTA systems that provide a TAPI driver. A TAPI driver must be present on the client machine in order for integration with TSAPI and CSTA systems to work.

• Telephony Server Provider (TSP) software installed on the telephony server. Specific software depends on the type of server.

• An operational CTI network that has been fully tested.

• Workstations configured for inclusion in the telephony network. For more details, see Enabling and configuring CTI.

• A list that specifies the TN number (analogous to the IP associated with the user) and DN number (user’s extension number) for each Sage CRM user so that they can be enabled for CTI on the Sage CRM server. See Role of the telephony administrator.

• A Sage CRM CTI license.

### Role of the telephony administrator

The telephony administrator is the person who administers a company’s Telephony Server and Switch. He will also be responsible for ensuring that the CTI network is operational and has been fully tested before the implementer begins installing Sage CRM CTI.

One important role of the telephony administrator is to set up telephony devices on the Telephony Server. This involves configuring the Telephony Server to associate each user in the local network domain with a particular telephone or telephony device. Each telephony device needs to be uniquely associated with a local telephony IP address. Each user needs to be associated with this address and assigned a TN number. A user list that specifies TN and DN numbers for each user needs to be compiled and made available to the Sage CRM implementer.

**Note:** If you have difficulty in identifying telephony device names for the users you want to enable for CTI, consider using a tool such as ExceleTel to help you do this.
Installing CTI

- Running the setup program
- Checking system telephone settings

Running the setup program

The installation process for Sage CRM CTI is almost identical to the installation process for a typical Sage CRM installation. For instructions on installing Sage CRM, please refer to the Installation and Upgrade Help. All of the screens and dialog boxes that display during the CTI installation are the same as the ones that display during the Sage CRM installation, except the following one:

An additional screen is displayed after the Default Currency dialog box that prompts you for information on the telephony network setup.

For example, let's say you are based in the US in Washington, DC. In addition, you typically dial "9" from your work telephone to get an outside line.

To complete the CTI information fields:

1. Select the country that you are located in from the What Country / Region Are You In Now list, for example, United States of America.
2. Type in your area or city code in the What Area Code (Or City Code) Are You In Now field, for example, 202.
3. In the If You Dial A Number To Access An Outside Line What Is It field, type the number that users typically dial to get an outside line, for example, 9.
4. Continue with the installation.

Once Sage CRM is installed, you can change the CTI settings specified during the installation. For more information, see Configuring CTI.

Checking system telephone settings

Once Sage CRM CTI is installed, you need to make sure that the server machine telephone settings correspond with the information you specified during the CTI install.

To check the telephone settings on the server machine:

1. Select Start | Control Panel, and navigate to the Phone and Modem Options option.
2. Highlight My Location and select the Edit button. The settings displayed on the Edit Location dialog box should correspond with the settings you specified during the Sage CRM install. If they do not, you can change them.

3. Depending on your location, you may need to specify (or verify) area code rules. To do this, select the Area Code Rules tab on the Edit Location dialog box, and select the New or Edit button, depending on whether you are specifying new rules or checking previously set up rules.

4. Select OK to close the Area Code dialog box and then OK to close the Edit Location dialog box.

### Enabling and configuring CTI

- Enabling CTI for a user
- Configuring CTI
- Making the telephony server accessible to users
- Checking user telephone settings

#### Enabling CTI for a user

1. Click ❮My Profile❯ | Administration | Users | Users.
2. Enter the last name of the user in Last Name and click Find.
3. Click the user hyperlink and click Change.
4. Select CTI Enabled.
5. Enter the device name for the user as defined on the Telephony Server in CTI Device Name. On some systems (for example, Swyx PBX), you must enter the phone’s IP address as the device name.
6. Choose the default screen that opens when the user clicks an inbound call hyperlink from CTI Call Screen. For example, customer service users may need to see the New Case screen to log customer service issues, while telesales operatives may need quick access to the New Lead screen to record new leads.
7. Ensure the correct phone number and extension are entered in Phone and Ext.
8. Click Save.

#### Configuring CTI

1. Click ❮My Profile❯ | Administration | System | System Behavior.
2. Click Change.
3. Configure the CTI fields described below.
4. Click Save.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTI Plugin Class ID</td>
<td>CTI plugin GUID. This GUID is always the same for the Sage CRM plugin. If a user has developed their own plugin, they must change this field to the GUID of their plugin.</td>
</tr>
<tr>
<td>CTI.cab Version</td>
<td>CTI plugin version used by Sage CRM. If a user has developed their own plugin, they must change this field to the cab name and version number of their plugin.</td>
</tr>
<tr>
<td>External Dial Prefix</td>
<td>The digit used in your organization to make a telephone call outside the company (external call), for example, 9 or 0. The number will already have been set up on the telephony server.</td>
</tr>
<tr>
<td>Default Country Code</td>
<td>The international country code for the country you are located in.</td>
</tr>
<tr>
<td>Default Area Code</td>
<td>The area or city code for the area or city you are located in.</td>
</tr>
<tr>
<td>Internal Number Length</td>
<td>The number of digits in your organization’s extension numbers. This is set to 4 by default. This field enables Sage CRM to determine whether an incoming or outbound call is an internal or external number.</td>
</tr>
</tbody>
</table>

**Making the telephony server accessible to users**

Once a user has been enabled for CTI, you need to ensure that the following command is run on the user’s desktop or laptop so that the telephony server is accessible:

```
TcmSetup /c <TelephonyServerName>
```

To run the command on the user’s desktop or laptop:

1. Select **Start | Run**, and type `cmd`
2. Type the command in the command prompt. If the server name is `TelephoneServer` for example, type the following command:
   `TcmSetup /c TelephoneServer`
3. Press **Enter**. The command is run, and a dialog box is displayed to inform you that the client was successfully set up.
4. Select **OK** on the dialog box.

You need to repeat the above steps on each CTI-enabled user’s machine.

**Checking user telephone settings**

You need to make sure that the telephone settings on the user’s computer correspond with the server telephone settings. For more information, see **Checking system telephone settings**.
Converting a text field to a phone number

When a user has been enabled for Sage CRM CTI, all phone number values are displayed as hyperlinks for the user. You can also create new phone number fields or convert a text field to a phone number that’s displayed as a hyperlink. CTI-enabled users can click the phone hyperlink to make outbound calls. Users can enter phone numbers in Phone Number fields in any format. CTI ignores all non-numerical characters and spaces when the user clicks the hyperlinked number to make a call.

1. Click <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | Fields.
2. Click the hyperlink of the field you want to convert.
3. Change Entry Type to Phone Number and enter the new caption and column names. For example, Direct Dial to Main Contact.
4. Click Save.
5. Click the Screens tab.
6. Click the hyperlink of the screen you want the converted field to appear on. For example, the Company Summary Screen.
7. Choose the converted field from Field and click Add.
8. Click Update and then click Save.
Self Service

- Getting started with Self Service
- Self Service web site
- Self Service security
- Administering Self Service
Getting started with Self Service

- Self Service prerequisites
- Installing Self Service
- Setting up Self Service

Self Service prerequisites

To run Sage CRM Self Service you need:

- Sage CRM installed on the same server with a valid Self Service license key.
- The same server software as for a typical Sage CRM installation. Refer to the System Administrator Guide for more information.
- You may need to install the Extensibility Module, depending on the functionality you want to implement on your web site. For more information, see Customizing Self Service web site.

Installing Self Service

During the Sage CRM installation you need to specify if you want to install a demo Self Service web site. Select the Sample Self Service Support site check box to install the site and use it as a template for the Sage CRM Self Service Web site. For more information on the demo Self Service Web site, see Planning a Self Service web site.

When you install Sage CRM Self Service, the following takes place by default:

- A new database called CRMSelfService is created, which contains the Visitor table, an important table for storing visitor details.
- A new option called Self Service becomes available on the Administration | System home page. This enables you to configure Sage CRM for Self Service and to maintain Self Service visitor information.
- A Self Service tab becomes available when you are in the Person and Company context. This allows People and Companies in Sage CRM to be enabled for Self Service and lets you assign a Self Service logon ID and password to them.

Setting up Self Service

Once Self Service has been installed, there are a number of tasks that need to be carried out manually before Sage CRM Self Service is fully functional. Steps include:
Planning your Self Service Web site.
Reviewing Self Service security issues.
Configuring Self Service administration settings.

Self Service web site

- Planning a Self Service web site
- Understanding basic Self Service architecture
- Customizing Self Service web site

Planning a Self Service web site

1. Draw up design specifications for the look and feel of the web site, as well as for the functionality the customer requires on the site.

2. Review the corporate Web site and determine whether you can reuse any web pages, logos, and other images. This will enable you to reflect the look and feel of the corporate web site on your Self Service site. The level of functionality you can include on your Self Service web site and the extent to which you can customize depends on whether you have the Extensibility Module. The functionality available with and without the Extensibility Module is discussed in Customizing Self Service web site.

3. You may want to use the demo Self Service web site as a template to create your web site. You selected the Sample Self Service Support Site check box during the Sage CRM installation.

The demo site is typically created in: ..\Program Files\Sage\CRM\CRMSelfServiceDemo

It is also available on the IIS Web server under Default Web Site.

Tip: We advise that a production system runs the Self Service web application under a secured web site (not the Default Web Site).

It contains ASP pages that reference Sage CRM blocks, image files, and include files (including the eWaress.js file). These files create the basic Self Service functionality. You will need to carry out further customization according to your implementation requirements.

Note: Before setting up a Self Service Web site, why not take a look at the Web to Lead feature in Sage CRM. The Web to Lead feature allows you to include HTML on a customer web site that will allow users of the customer Web site to create leads on the Sage CRM server. For more information on the Web to Lead feature, see the System Administrator Help.
Understanding basic Self Service architecture

Please read this topic before you start customizing the Self Service web site.

Accessing the Self Service web site

Registered Self Service users (that is, People or Companies registered in the Sage CRM system) can log onto the Self Service site, view relevant information, and perform functions, such as reporting a problem or requesting product information. An identifier in Sage CRM Self Service that enables access and rights on a per user basis will authenticate them to perform functions. Visitor information is stored on the Self Service database in the visitors table.

Ewaress.js file

The Sage CRM Self Service application server should be run remotely from the Sage CRM database server. For example, a customer service case entered in the Sage CRM system can be viewed on the Self Service web site. For more information, see the Installation and Upgrade Help on the Sage CRM Help Center.

The eWaress.js file is the component behind this functionality. This file works in the same way as a typical Sagecrm.js file, but it is also responsible for establishing the link between the Sage CRM database and the Self Service database, thus ensuring that the databases can communicate with each other.

It is important to note that the eWaress.js file (rather than the Sagecrm.js file) is referenced in all Self Service ASP pages. For more information on the Sagecrm.js and eWaress.js files, see the Developer Help on the Sage CRM Help Center.

Customizing Self Service web site

The functionality available in the Self Service web site and the extent to which you can customize it depends on whether you have the Extensibility Module.

Note: The Self Service web site is a series of HTML based web pages, so you can add any standard HTML field types, for example, text entry fields, drop-down lists, and radio buttons. However, you will not be able to add Sage CRM-specific field types, such as search select advanced fields.

Without the Extensibility Module

Without the Extensibility Module, you are limited to customizing a number of specific blocks. This may be sufficient, depending on implementation requirements. The blocks are accessible from one of the following locations in Sage CRM:

- Administration | Customization | <Entity> | Lists
- Administration | Customization | <Entity> | Screens
Please see the table below for a description of the Screen and List blocks you can customize without the Extensibility Module. The table describes some of the blocks referenced in the Self Service demo web site.

<table>
<thead>
<tr>
<th>Block name</th>
<th>Block type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>sscaselist</td>
<td>List Object</td>
<td>Displays a list of cases for visitors.</td>
</tr>
<tr>
<td>sscaseentry</td>
<td>Screen Object</td>
<td>Enables visitors to register new cases via the Web site.</td>
</tr>
<tr>
<td>ssopportunityentry</td>
<td>Screen Object</td>
<td>Enables visitors to create new opportunities in Sage CRM, via the Web site.</td>
</tr>
</tbody>
</table>

You customize Self Service screens and lists from Administration | Customization in the normal way. Please refer to the Administrator Help for more information on screen and list customization.

**Example: Linking Problem Details to the Case Summary page**

You can customize the sscaselist so that the problem details link to the case summary on the Self Service Web site. To do this:

1. Go to Administration | Customization | Cases | Lists.
2. Click the ssCaselist hyperlink.
3. Select Cases: Problem Details from the available Desktop HTML List Contents.
4. Select CaseProgress : Problem Details (case_problemnote) from Field.
5. Set the Hyperlink To field to Custom Jump.
6. Make sure the Custom File field is set to casedetail.asp and the Custom ID field is set to case_caseid.
7. Click the Update button.
8. Click Save.

**Note:** The options Allow Order By, Order By Desc, and Default Order By are not allowed for columns. They should be set to No or left blank.

**With the Extensibility Module**

With the Extensibility Module, you can use the complete set of Sage CRM blocks to add extra functionality to your Self Service web site.

You reference the blocks in ASP pages in the same way as you do within standard Sage CRM. One difference, however, is that you reference the eWaress.js file (rather than the Sagecrm.js include file) on all ASP pages.
Using the Sage CRM interface and ASP pages, you can create new blocks for Self Service or use existing Sage CRM blocks and restrict them to show less information. You can set screens to be editable or read-only, restricting what different users can do on the page. User passwords can be allocated at Person or Company level. For more information about Sage CRM blocks, refer to the Developer Help on the Sage CRM Help Center.

Typical functionality that you can add to the Self Service site using ASP pages includes:

- Enabling visitors to view product information via the web site.
- Enabling visitors to view their visitor profiles and edit them via the web site.
- Creating leads based on the information typed by the visitor.
- Contacting visitors directly by the customer service department.

**Self Service security**

Sage CRM offers a number of security and access options at the application level:

- **Server Level Security.** Sage CRM supports all industry server security standards, and there are a number of methods available to secure the Self Service server.

- **SSL (Secure Sockets Layer) encryption** can be employed to secure data sessions with client users. When an SSL session commences, the server sends its public key to the browser. In turn, the browser uses this key to send a randomly generated key back to the server. As a result, there is a secret key exchange for the session. When IIS uses SSL encryption, Sage CRM is aware of this and when the client attaches any documents to a form in Sage CRM it sends through the encrypted sessions.

- A **firewall** can be used to restrict unauthorized access to the database. Firewalls are commonly employed to give users secure access to the Internet and, at the same time, separate a company's Web server from its internal network. Various types of firewall are available, including packet filter, proxy server, NAT (network address translation), and firewalls that adhere to stateful inspection technology standards.

Sage CRM Self Service can run behind a firewall in order to protect the server from malicious attacks and to allow only certain types of interactions to take place. The Sage CRM Self Service server can be physically separated from the Sage CRM server, and a firewall can be installed around the Sage CRM server.

- **Database Level Security.** Sage CRM Self Service users do not have direct access to the database. The Sage CRM Self Service pages opened by the user send requests via IIS to the eWare DLL to access the database.

- **Network Security.** Sage CRM supports all industry standard network encryption protocols.

**Administering Self Service**

- **Self Service administration settings**
- **Modifying Visitor list**
Self Service administration settings

To access the Self Service administration settings in Sage CRM, go to Administration | System | Self Service.

The page that opens contains the following tabs:

- **Visitor List.** Allows you to view a list of registered and anonymous visitors and view and edit visitor profiles. For more information, see Modifying Visitor list.
- **Self Service Configuration.** Allows you to specify database connection settings. For more information, see Configuring Self Service.
- **Visitor Maintenance.** Allows you to remove inactive visitors to keep your Visitor list short. For more information, see Removing inactive visitors.

Modifying Visitor list

The visitor list page lets you manage your visitor list, ensuring that it does not get too long or unmanageable.

1. Click the Visitor List tab. You can view a list of visitors to the Self Service web site.
2. To search for a particular visitor, end the visitor's last name.
3. To view and edit visitor details, click the visitor's name hyperlink. When you click the Person hyperlink, the Person Summary page opens. You can view and edit visitor profiles. The type of information that you can view depends on your Sage CRM implementation.

Configuring Self Service

The fields on the Self Service Configuration tab are set by default when you install Self Service. You might need to change them if you make changes to the Sage CRM or Self Service database configurations.

1. Click <My Profile> | Administration | System | Self Service.
2. Click the Self Service Configuration tab.
3. Click Change and make your changes to the Self Service fields described below.
4. Click Save.

The table below describes the standard fields on the Self Service Configuration tab.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Driver</td>
<td>The type of driver on which the Self Service database sits.</td>
</tr>
<tr>
<td>Database Server</td>
<td>The name of the server on which the Self Service database sits.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Name</td>
<td>The name of the Self Service database.</td>
</tr>
<tr>
<td>Database User Name</td>
<td>The ID of the user who will be used to connect to the Self Service database.</td>
</tr>
<tr>
<td>Database Password</td>
<td>The password of the user who will be used to connect to the Self Service database.</td>
</tr>
<tr>
<td>Enterprise Database Driver</td>
<td>The type of driver on which the Sage CRM database sits.</td>
</tr>
<tr>
<td>Enterprise Database Server</td>
<td>The name of the server on which the Sage CRM database sits.</td>
</tr>
<tr>
<td>Enterprise Database Name</td>
<td>The name of the Sage CRM database.</td>
</tr>
<tr>
<td>Enterprise User Name</td>
<td>The ID of the user who will be used to connect to the Sage CRM database.</td>
</tr>
<tr>
<td>Enterprise Password</td>
<td>The password of the user who will be used to connect to the Sage CRM database.</td>
</tr>
<tr>
<td>Session Expires In (Hrs)</td>
<td>How long the Self Service session lasts for until the user is logged out.</td>
</tr>
</tbody>
</table>

### Removing inactive visitors

Suppose you want to remove all visitors who have not visited your Self Service web site in the past six months from the Visitor list.

To remove visitors from the Visitor list:

1. Open the **Visitor Maintenance** tab.
2. Enter a value in **Delete Visitors who have not visited in more than <value> months**.
3. If you want to delete anonymous visitors only, select the **Anonymous Visitors Only** check box.
4. Click **Delete**. When prompted, confirm that you want to delete visitors.
Glossary

A

Action Button
Action buttons are usually found on the right-hand side of the screen. They help you add and change information and perform different tasks within the system. The action buttons available to you change depending on where you are. Examples of Action buttons are: Change, Delete, Confirm Delete, New Task, New Appointment.

Advanced Find
Allows users to create enhanced search queries based on complex SQL statements using WHERE, AND, and OR clauses.

Apply Filter button
The apply filter button allows you to restrict lists of information by a predefined set of criteria.

C

Campaign
A campaign is a planned rollout of marketing activities in phases, or Waves. Each phase can in turn be made up of several actions or Wave Activities. Each action can in turn be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography.

Case
A case is a customer service issue. These issues can range from a technical problem to a customer complaint. A case keeps track of the issue from the initial logging through to resolution. Multiple communications (or tasks) can be linked to one case.
Combination
A bar chart indicates one set of data and a line chart indicates another set of data so you can get a wider view of results in one place. A combination chart is useful in a Monthly Sales Trends report to show information such as the revenue earned from sales and the number of sales that were closed in a particular period.

Communication
Communication refers to a task or meeting. The specific types of communication are determined as action types. For example, Letter In, Letter Out, Phone In, Phone Out, Demo.

Company Team
A Company Team is a group of users linked to a company for the purpose of tracking account management responsibilities.

Context Area
The context area displays a summary of the information you are currently focused on. Example: If you are working in the context of a person, their name appears on the top of your screen. Within the same context area you can see their company, phone number, and e-mail address. You can quickly move from the context area of a person to the company they work for by clicking on the Company link within the context area.

Dashboard
The Dashboard is a customizable page that contains information most relevant to your daily work. For example, a list of the companies you most often work with.

Document Drop
The Document Drop feature provides a short cut for linking documents, e-mails and other types of files from another application to customer data in CRM.

Documents Tab
The Documents tab is available within the context of a person, company, opportunity, case, or solution. It stores a link to a document.

Favorites
Click the Favorites icon on the top bar to display a list of your favorite Sage CRM records that you can access quickly. You can favorite a company, person, case, opportunity, lead, solution, communication, order, quote, or custom entity record.
Find page
The Find page is displayed when the user clicks Search | <Entity>. There is a Find page for companies, people, opportunities, leads, solutions, cases, and communications.

Forward and Back buttons
The Forward and Back buttons take you one step back or one step forward from your current position in the system. While using the system, they are intended as a replacement for the Forward and Back buttons within your Web browser window.

G

Gauge
Partitions on the chart indicate three ranges in relation to a target value; below, approaching, exceeded. The gauge needle indicates the current value. A gauge chart is useful in an Actual vs Target sales report to show how your actual sales compare to your forecasted sales for a particular period.

Groups
Groups allow users to create collections of records within CRM. Groups can be static or dynamic.

K

Keyword Search
To search for keywords across specified primary entities, click the Search arrow and click Keyword Search. You can include wildcard characters to search for a variety of text and characters.

L

Lead
A lead represents unqualified information received from your corporate Web site, trade shows, and purchased mailing lists.

Line Item
Line items are products that your customer is interested in buying. They are linked to the opportunity and selected through the Quotes or Orders tab.
MailChimp
An email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results.

Menu button
Menu buttons are found on the left-hand side of the screen. They help you navigate to commonly used pages. Menu buttons remain the same regardless of the company or individual or any other context you are working in. However, one user may see a different set of menu buttons to another, since access to these is set up in the user profile. Examples of Menu buttons are: New, Find, Team CRM.

My CRM
The My CRM button shows a series of tabs all containing information related to the logged in user. Depending on the user's rights, the My CRM areas of others can also be viewed by selecting another person from the context area of the screen.

Next and Previous arrows
The Next and Previous arrows appear when a list of information extends to more than one page. Clicking on the left- or right-pointing arrows will display the previous or next page respectively. The outer arrows take you to the first or last page within a set of pages.

Notifications
Click the Notification icon on the top bar to display a list of active notifications. Notifications are usually reminders for tasks or appointments, or system alerts set up by the user or the system administrator.

Opportunity
An opportunity refers to a sales opportunity. Opportunities track sales interest from the initial qualified lead through to closing the deal.
Outbound Call List

Outbound Call Lists are used for high volume telemarketing activities, where calls are not preallocated to individual users, and a Communication record is only created when a successful contact is made.

Panel

A panel groups related information for easier viewing. One page of information can be divided into a number of panels.

Progress button

The progress button is available in the context of leads, opportunities, solutions, and cases when the workflow functionality is not in use. It can be accessed from the lead, opportunity, solution, or case summary page. It allows users to change the Stage, Status and other data relating to the lead, opportunity, solution, or case. It also allows users to add a tracking note, which forms part of the history of the lead, opportunity, solution, or case "life cycle".

Quick Find

You can enter key terms in Search on the top bar to search all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once.

Quick Look

The Quick Look tab shows you the most recent communications, opportunities and cases associated with a company or person.

Recent list

Click the Recent icon on the top bar to display a list of records you viewed recently. This list saves company, person, opportunity, quote, order, lead, case, solution, campaign, and group records.

Relationships

The Relationships tab is available within the context of all main entities. You can show links between different types of information. For example, you can set up a relationship between a company and its directors, or between an opportunity and the people influencing it. Your System Administrator defines the different Relationship Types that can be set up from each tab.
Shared Documents
The My CRM | Shared Documents tab lists all the Shared Documents and Templates you have access to.

SLA
SLA stands for Service Level Agreement. A Service Level Agreement is made between your organization and a customer to set standards for customer service case resolution times. Service level agreements can be linked to companies and to individual customer service cases.

SMS
SMS stands for Short Messaging Service. If this feature is activated for your system, SMS is used to notify users via their mobile phone or other wireless device of events taking place. For example, you can receive a reminder of an upcoming meeting via SMS messaging. It can also be used in conjunction with workflow to notify users of new leads, overdue cases, or closed opportunities.

Solution
Solutions are the "cleaned and approved" basis of a knowledge base. Solutions can be accessed by internal CRM users, as well as customers and partners via a self service Web site. Solutions are a separate entity from Cases, but they can be linked to multiple cases—and a case can be linked to multiple solutions.

Sort
You can change the sort order of any list by clicking on the underlined column heading.

Stacked chart
Bars are stacked on top of each other to display grouped data. It provides a wider view of data than a regular bar chart. A stacked chart is useful in an Open Activities activity report to show several actions that occurred on a particular day or date.

Tab
Tabs are like folder dividers. The information found in each folder section is determined by the current context. For example, if the person "Anita Chapman" has been zoomed in on in the context area, selecting the Quick Look tab will display the most recent interactions your company has had specifically with Ms Chapman.
Tabs menu

The tabs menu provides quick access to main entities in Sage CRM. It's available on all screens in Sage CRM. Depending on your screen's size, the tabs menu can be found: Just under the top menu in Sage CRM. If there are too many tabs on the menu, some of them will be grouped down under a More heading. By clicking the &lt;insert symbol image&gt; icon at the top-left hand-side of the screen.

Team

A team is a group of users who perform similar roles. Tasks (communications), opportunities, leads, and cases can all be assigned to a team. A user can be a member of one team. This is called their Primary Team. A user can also have rights to view information in multiple teams.

Tracking note

Tracking notes are used in the context of leads, opportunities, cases, and solutions to make free text notes on the progress of the lead, opportunity, solution, or case.

V

Validation error

A validation error message appears on the screen when an incomplete or incorrect new entry has been made in the system. The user must fill in required fields that are empty, or correct an invalid entry, such as numbers in a text-only field. These fields are highlighted with a question mark and cross mark, respectively.

W

Wave

A Wave is a phase of a marketing campaign. Each wave can be made up of several actions or Wave Activities. Each action can in turn be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest.

Wave Activity

A Wave Activity is a type of action within a wave of a marketing campaign. Each wave activity can be made up of individual communications between your company and its target audience. For example, a campaign called West Coast Lead Generation aims to generate leads in a specific geography. The campaign consists of three different Waves: 1) Raise Awareness; 2) Product Launch at Tradeshow; 3) Qualify Interest. The first wave is made up of two different wave activities: "Flyer Mailing" and "Newsletter Mailing". The second wave is made up of the following two wave activities: "Invitation with Response Card" and "Response Card Follow-up", and so on.
Wild Card

The % wild card helps you complete unspecific searches. The % (percentage) symbol, means "contains". For example, typing "%software" in the Company Name field of the company Find page returns a list of all companies, which contain the word "software" in their company name.

Workflow

Workflow automates your company’s business processes using a predefined set of rules and actions.