Sage CRM 2018 R3
Implementation Workbook

Updated: August 2018

Contents

About this workbook

This workbook guides you through the scoping, planning, installation, customization, and roll out of a Sage CRM implementation so you can be confident that the system meets your customer's requirements and helps them achieve their business goals. It's important to remember that you are actually implementing a business strategy that will help a business to increase sales opportunities, automate processes, mine information for strategic purposes, and connect departments to improve customer insight and customer experience. In summary, your implementation of Sage CRM should help your customer to run a customer-centric business.

One of the main challenges when implementing a system is capturing customer pain points and prioritizing those that matter most in terms of measurable savings and improvements. This workbook provides sample questions about your customer's current business, including needs and problems, that you can ask key people in the company. The aim of these questions is to really understand the customer's business. The workbook includes forms where you can record their answers to help you identify solutions and metrics of success. It also includes customization guidelines and links to supporting documentation. We hope it will form part of your project delivery toolkit that helps you to take customers on a journey from pre-sales to project completion. Other project delivery material includes our Project management methodology guide and the Project objectives template which are available on the Community.

You can access all Sage CRM Help, guides, and videos from the Help Center. We also recommend that you sit our Sales eLearning course.

Implementation methodology

Will you use a Rapid Application Development (RAD) or a Waterfall approach to implement Sage CRM? The methodology you choose depends on the project details and the people involved. During the planning phase, consider the following questions to determine which implementation methodology is most suitable.

How big is the project?

- RAD is suitable for projects that can be broken into small pieces. Or for smaller projects that can be launched quickly.
- Waterfall is suitable for projects that don't require a series of prototype steps.

Do you need a prototype?

- A prototype provides an early look at the system and allows you and the customer to refine the system requirements through an iterative process.

How flexible is the customer?

- RAD requires that your team and the customer are highly flexibile and can manage change. Prototyping could change the system requirements and require customizations to be abandoned or totally reimplemented.
- Waterfall is best when you need to document every customization and all proposed changes must go through a scope-change management process.

How much will you customize the system?

- If you will customize Sage CRM heavily, RAD and the prototype model are useful.
- Waterfall is a good approach when implementing a packaged system such as Sage CRM with little customization.

How engaged will the customer be in the implementation?

- RAD requires customer involvement during planning, analysis, testing, and repeatedly during prototyping.
- Waterfall requires customer involvement during planning, analysis, and testing.

How experienced is your project manager?

- RAD requires a project manager with strong organizational skills.

Get an overview of the business

The first and most important question to ask your customer is ‘What is your business case?’. The details of the business case impact every subsequent question that you ask when building an picture of the business. If the customer doesn’t have a business case, you can tailor your questions to highlight benefits of Sage CRM and the associated return on investment (ROI). You also use the business case to define a successful end project that meets customer requirements rather than just meeting budget targets and deadlines. It’s crucial to understand the business case before you start talking to the end users.

When you've established the business case, the next step is to identify the key roles in your customer's business. In general, you can split roles into Business Management, Sales, Marketing, and Customer Service. Talk to the key people in each role to find out about their daily tasks and requirements so you can build an overview of the business, including the current pain points, what users expect from the new system, and a clear understanding of the existing and ideal business processes.

What does the business look like?

In general, you can split roles into Business Management, Sales, Marketing, and Customer Service. Talk to the key people in each role to find out about their daily tasks and requirements. You can use the questions below as a starting point to gain insight into the business and match the customer's unique business processes to Sage CRM features.

Business management overview	
What is the purpose of your business?	
What do you sell, to whom, and how?	
Who are your competitors and how do they operate in your market?	
What is your business model?	
How is your company's success measured?	
What are the key determinants of profit for your business?	
What are the biggest challenges facing your company currently?	
How do you manage sales performance?	
How do you create demand for your products / services?	
How do you manage customer retention?	
How do you measure staff productivity?	
Where do you get information to support your business decisions?	
What are your priorities for the next six months?	
Do you have multiple sources of information?	
How would it help your business if you could automatically integrate your multiple data sources and produce one dashboard view of the business?	
Can you easily build one correct view of your business? If not, why? If so, how?	
What would a single view of your business mean in terms of time and money savings?	

Business management overview

How do you gain visibility on important performance indicators and areas of business that are outperforming or under performing relative to this year and last year, and benchmarked against other companies in your area?	
Have you had challenges in the past with a software system? Can you describe the challenges?	
How ready are your staff for a new system?	
Are you introducing any process changes?	

Sales overview

What is your target market?
How is the sales department structured?
Where are your sales staff located? (Local / Remote)
Do you manage a sales team who are on the road?
How you track the sales pipeline?
Do you have a telesales department?
Do you use direct selling or other channels?
Do your sales team manage different territories?
How do you measure your sales teams' performance?
How do you manage key sales opportunities?
Do you operate a formal sales process? How do you enforce it?
How do you track sales teams' activities?
Do your sales people receive incentives? How are these calculated?
How do you calculate forecasts?
Can you leverage your accounting data?
What type of reports do you generate?
How do you report revenues and forecasts?
What is the size of an average deal?
How do your sales, marketing and support staff collaborate?
What are your priorities for the next six months?
What processes do you need to see improved and why?

Marketing overview

What is the main function of marketing in your company?
What are your three most important marketing metrics? How do you measure them?
How type of marketing methods do you use? What works best?
What could be improved?
How do you measure the success of a campaign?
Can you easily profile and target the people you need to?
How do you generate leads?
How do you track social media interactions?
How do you ensure quick follow-up on leads?
How do you ensure leads get passed to the right person?
How do you track leads once they are passed to sales?
How do you communicate with customers?
Can you analyze current and future sales trends? What does it mean to your business in terms of time and money?
How do your sales, marketing and customer service people collaborate?
What are your priorities for the next six months?
What processes do you need to see improved and why?

Customer service overview

What is the main function of customer service in your company?
What are your three most important customer service metrics? How do you measure them?
Is customer satisfaction and loyalty where it should be? Why?
How is the customer service department structured?
Do you have a call center, complaints department, field service engineers, or help desk?
What volume of support calls do you handle on a monthly basis?

Customer service overview

Do support queries come from email, phone, website?
How do you allocate cases to customer service people?
How do you track cases?
Do you know which products or services cause the most problems?
What kind of service level agreements do you have in place?
How do you manage response times?
How do you identify unprofitable support contracts?
What are your priorities for the next six months?
What processes do you need to see improved and why?

What are the business needs?

To identify how Sage CRM can serve the business and make daily work life easier and more efficient, you must capture your customer's pain points and expectations for the new system. Talk to your key stake holders and ask them about their pains and needs, and then identify Sage CRM features that could help offer a solution. The final piece is to define metrics to measure the benefits of each solution in terms of ROI. You need to verify if the solution is actually delivering on promises and providing maximum benefit to your customer's business. Does the solution increase revenue, avoid costs, and improve service? You can use these metrics to determine the effectiveness of the implementation and further refine your business mappings, customizations, or your user training if necessary. The following tables contain example needs mapped to real product features.

Business management

Needs	Product feature	Metrics
Visibility across the entire business to make informed decisions and take corrective actions.	Integrate the system with the customer's accounting solution to combine financial information from the front and back-office for a complete view of the business.	Does the solution increase revenue, avoid costs, and improve service?
Visibility into cash flow, expenditure, and budgets to manage business planning, forecasting and budgeting to succeed.	Month-on-month and week-on-week reports provide insight into revenue and budget variance. Reports that detail marketing campaign costs, product costs, and service costs provide insight into expenditure. Accurate forecasting capabilities are available out of the box. Dashboards that include Forecast summary and Actual versus Target reports and charts provide immediate insight.	
Monitor and manage revenue performance on a daily basis.	Won Deals Leaderboard, Opportunities Closing report, and Actual vs Target charts for the sales team that update in real-time or on a daily basis.	
Metrics about business growth through opportunities to increase revenue.	Month-on-month reports and year-on-year reports show revenue increase or decrease.	
Win / loss analysis to learn what did or didn’t work for future opportunities.	Sales Metrics for Managers dashboard shows detailed information about open, closed, won, and lost deals.	

Business management

Needs	Product feature	Metrics
Visibility into key sales opportunities and performance to take required action.	Team opportunity pipeline and statistics, team calendar, Team Opportunities report and Monthly Sales Trends report provide information about team performance.	
Correct tools and processes to ensure the business is efficient and focused on growth.	Data upload and deduplication rules ensure clean data. Workflow automates business processes and ensures data integrity. Outlook integration enables automatic update of team and user calendars. Alerts notify managers and other users with important information. Export to PDF enables reports to be shared.	
Good business reputation and brand recognition to grow the customer base.	Configure social integrations to view customer comments, in particular the Twitter plugin which can report on what's trending. Set up campaign management to see statistics about the success of eMarketing campaigns.	
Competitor information to manage threats to the business.	Deals Lost to Competitors report provides details and figures. Configure customized news feeds in dashboards including stock, industry, and social feeds to provide real-time information about competitors.	
Maximize average revenue per active customer (ARPAC), cross-sell, and up-sell.	Integration of customer service and sales data so non-sales users (customer service) can learn about existing customers, the products they have, and cross-sell or up-sell opportunities.	.
Get accurate, up-to-date business KPIs anytime and anywhere.	Mobile access to reports and the ability to produce and email PDF versions of reports. Users can share charts on Yammer.	
Efficient and effective handling of customer service issues to retain customers.	KPI reports that show attrition rate, call rate, and first call resolution. At Risk Customer report lists customers who haven't made a purchase or been contacted in a specified time frame and are considered at risk of leaving the company.	

Sales

Needs	Product feature	Metrics
Quick insight into sales rep performance to know if revenue goals are on target.	Create a dashboard that shows a comparison of won opportunities, revenue generated, and targets achieved for similar sales reps. For example, all reps in a particular territory or selling a similar product. You could limit access to the dashboard to the Sales manager. Forecasting functionality produces accurate target figures.	Does the solution increase revenue, avoid costs, and improve service?
Lead information complete and correct so team doesn't have to clean it.	Set up deduplication rules and match rules for data upload.	
Allocate qualified leads efficiently and control visibility of lead data.	Use territories, user profiles, and access rights to restrict users and teams from viewing other sales rep's leads.	
Include lead follow up in the automated lead qualification process to progress leads quickly.	Include a communication task in the lead workflow to ensure all sales reps follow the same procedure. View communications on each lead to establish if they were emailed or phoned, and their order history.	
Manage stale contacts automatically	Use table-level scripts to identify contacts that meet the definition of stale. For example, contacts with no communications for a specified period of time. Use a script to automatically set the status of the contact record to Stale and hide the record.	
Identify leads that must be followed up within one week to meet KPIs and generate automatic reminders to follow up with them.	Notification rules, email alerts, and escalation rules configured for each rep based on their targets and dates.	
Track and report on Sales team activities at a leadership level and against criteria to take corrective action.	Real-time pipeline management ensures focused sales activity . Team-level reports identify non-performing team members on a daily and weekly basis. The Sales rep calendar shows Sales rep activities.	

Sales

Needs	Product feature	Metrics
Protect against data manipulation to ensure reliable sales rep tracking and sales forecasting.	Territories, user profiles, and access rights to restrict users from manipulating data. Limit user and team access rights to update contact details. For example, the acquisition team has rights to update contacts but the retention and sales teams do not. All centrally managed contact data is available on mobile devices.	
Store all customer information centrally and protect against data duplication to ensure data is reliable, and provide complete insight into customer relationships.	Set deduplication rules on data upload. Integrate financial information is taken from the back-office system for accurate pricing, quotes and orders, and consistent up-to-date data. Use mandatory data validation using deduplication fields, required fields, image only fields, field-level scripting to validate data. Control on data input is necessary for integrations between accounting systems and Sage CRM.	
Easy access to complete and up-to-date customer information to prioritize up-sell and cross-sell opportunities, use time efficiently, reduce administration, and maximize sales.	Integrated sales, accounting and customer service data provides complete customer information. Customize tab and field order (Quotes tab beside Orders tab), and fields on forms to optimize layout and minimize data input. Use keyword search, recent lists, and favorites to optimize the system for fast retrieval of data. Use groups to access data for the day (group opportunities by product). Use dashboards to list daily tasks or people to contact.	
Mobile access and reporting capabilities for sales forecasts, pipeline, and customer information.	Mobile access to forecasts, reports and the ability to produce and email PDF versions of reports. Users can share charts on Yammer.	
Increase competitiveness between team members to motivate them to meet targets.	Dashboard comparing KPIs for all sales reps that includes detailed statistics about the top performer.	

Sales

Needs	Product feature	Metrics
Establish a clear sales closing process to manage leads consistently, maximize deal closure rates, and increase cross-selling and up-selling.	Configure workflow to reflect the ideal sales closing process including automated quotes and orders if applicable, cross-sell and up-sell opportunities. Create a workflow report that includes stages of the opportunity pipeline and shows how long an opportunity was in each stage.	
Ensure receipt of payment for closed deals so the associated sales rep can claim commission.	Set up an automated email (using an email template and email alert) in workflow when the order goes into workflow if a third-party takes care of payment.	
Coach and train the sales team so they meet their sales targets.	Coaching notes can be recorded and MP3 files saved with specific cases so other sales team members can learn from successful calls.	

Marketing

Needs	Product feature	Metrics
Reach as many people as possible in the most cost efficient way with targeted customer communications.	Use mail merge to create automated emails that provide future customers with useful product information to shorten the sales cycle. Use MailChimp to create email campaigns that are refined and targeted based on analysis of campaign statistics.	Does the solution increase revenue, avoid costs, and improve service?
Categorize and store contacts in one system so all eMarketing systems can access them and no time is wasted compiling mailing lists	Use web-to-lead to decrease cost-per-lead through automation. Upload CSV files of existing contacts. Integrate eMarking systems with the accounting system and Sage CRMto access all existing customer information and quickly pull reports from different systems to focus on high value tasks.	
Justify the cost of marketing campaigns to directors to request additional funds	Use MailChimp statistics to calculate the cost of the campaign based on the number of unopened emails, number of leads generated, number of links clicked and the number of sales closed.	
Quickly view the performance and ROI of each campaign so that corrective actions can be taken	The hashtag tracker in Twitter identifies trending hashtags which can indicate the success of a campaign. MailChimp statistics are powerful indicators of interest in a campaign. Expose more MailChimp reports in Sage CRM.	
Get feedback from sales and support teams about customer reaction to a marketing campaign so corrective actions can be taken	Use Yammer to promote colleague collaboration.	
View all competitor marketing campaigns in one place to understand market trends	Create a dashboard dedicated to each competitor with a link to the website, their social feeds, stock prices, and news bulletins. Include a chart showing Deals Lost to Competitors.	
Track the marketing team’s activity	Use the Team calendar to view activity. Create reports to list campaigns by marketing rep and detail associated communications for each campaign.	

Marketing

Needs	Product feature	Metrics
Plan marketing campaigns in advance in the most efficient way	Schedule social media campaigns using Twitter and set up drip marketing campaigns using SwiftPage.	
Measure the quality of generated leads to generate more opportunities and to understand how customers consume campaign material.	Create reports based on MailChimp statistics including opened, clicked links, bounced, unsubscribed and blocked emails. Calculate how many leads are generated by each type of media; create reports to compare Twitter, phone, and email for lead generation.	
Establish a clear marketing process to manage campaigns consistently, maximize lead creation, and educate the customer at every touch point.	Configure workflow to reflect the ideal marketing process.	

Customer service

Needs	Product feature	Metrics
Team schedule calendar with HR, phone, forecasting and resource system integrations.	Integrate Team calendar with other systems for complete historical information and accurate activity forecasting.	Does the solution increase revenue, avoid costs, and improve service?
Critical real-time data so team can be pro-active about resolving cases and identifying upselling opportunities.	Use Yammer to notify team about bugs and patches, team members out of the office today, alerts of call spikes, and team specific news. Use RSS feeds and onscreen notifications to share product information such as special offers and release dates. When a rep is off a call for meetings, it affects KPIs. Use Team Calendar and onscreen alerts and notifications to send updates instead so reps can consume the information while taking calls.	
Transfer cases to upselling opportunities	Case workflow supports automatic transfer of cases to sales opportunities. Include escalations, automatic notifications, and tie cases to service level agreements. Configure case workflow to create cases from incoming customer emails, from support forms on the web site, or from customer telephone calls.	
Identify repeating cases so they can be escalated quickly, capture terms used in calls and alert all teams when common problems occur.	Use Yammer to let customer service reps talk to each other during calls. Trending hashtag words on Twitter help identify repeating cases. Knowledge Base enables the first customer service rep to record the issue and resolution and share it with the team to shorten the response time for subsequent support calls. Team can review, accept or reject draft KB articles.	
Capture coaching notes and feedback for certain calls and cases.	Use Notes, log call recordings, and associate a recording with a case. Use History and Notes to attach customer satisfaction and feedback information.	

Customer service

Needs	Product feature	Metrics
Mass creation of users for seasonal staff and exportable details about each user	Clone users and change their details. Create a report about each customer service user including their training, experience, access rights that can be exported as PDF and given to HR, IS, or the Resource team.	
Optimized reporting and integrated reports with data sourced from external systems	Integrate with the accounting system so closed sales can be linked to the customer service rep who initiated them. Integrate with customer service systems to report on show Agent Schedule Adherence, Average Handle Time, Active and Waiting Calls, and Call Resolution. Optimized reporting includes one-click reports, report data displayed as charts on dashboards, reports based on other reports values. Integrate with a Business Intelligence system to schedule reports.	Measure case volume and support response time, case volume, resolution times.
Get more information to hit revenue related KPIs and progress generated leads.	A dashboard for each rep with a prioritized list of cases assigned to the rep, and a chart showing rep's performance compared to the top performer to motivate the rep. A team dashboard so team supervisor can view the entire service case list, identify which cases are beyond their SLA response times, and increase their priority. Supervisor can review and adjust the case load for each team member. Create a report that shows rep x against rep y for a particular period and display it as a rep by rep comparison on the dashboard. Security levels and profiles can restrict which users see reports. A dedicated dashboard for priority customers to support a higher level of care.	
A one stop shop for new starters including a new starter cheat sheet and FAQ.	A dashboard with links to the Knowledge Base, Getting Started withSage CRM videos, Welcome to the business information, and HR information.	

What are the existing process?

Talk to your stake holders to get a detailed picture of existing business processes. You can then combine this information with the needs and features that you identified in What are the business needs? to plan automated processes (workflows) that reduce administration, ensure consistency and optimize business performance. The following questions can help you get started.

Process overview	
Where do your leads come from?	*Emails, customer service cases, web-to-lead, social media....*
Do you work from purchased lists?	
Do you have a web site that generates **contact us** requests?	
When the phone rings, what happens?	
When an inquiry comes through, what happens?	
What questions are asked in an initial inquiry?	
Do you have a large volume of leads?	
How is an inquiry assigned to a sales person?	
Do you track specific milestones along the sales process?	
Do you have a defined workflow already in place?	
What are the processes in this workflow?	
How long does each process take?	
How many steps are in each process?	
How many people are involved in each step?	
How much time and money is spent at each step?	
How do you support your customers through the sales process?	

What are the data sources?

It's a good idea to identify all the data sources that feed into the business process to ensure you don't miss anything when it comes to uploading data into Sage CRM. Having a clear picture of the data also helps you determine whether you can save it directly to existing entities or if you need to customize some entities to reflect your customer's unique data requirements. Here are some example inputs and formats.

Business Management data inputs	Current format
Cash flow figures, expenditure, and previous budgets are required to produce accurate business forecasts and budgets.	Cash flow figures for the current month are saved in Cashflow<month.year>.xls. Expenditure figures for the current month are saved in Expenditure<month.year>.xls. Previous budgets are saved in Budget<year>.xls.

Sales data inputs	Current format
Product information (such as codes and item prices), customer information (such as contact details and discounts applied) are required to produce a quote.	Product information is held in the accounting system database. Existing customer contact information is listed in ExistingCustomers.CSV. Customer discount information is held in CustomerDiscounts.xls.

Marketing data inputs	Current format
Contact information for existing customers and potential leads is required to create campaign mailing lists.	Existing customers are listed in ExistingCustomers.CSV. Potential leads are listed in PotentialCustomers.csv.

Customer service data inputs	Current format
Solutions to known issues, customer contact information, and case history information is required to resolve a customer case.	Solutions to known issues are documented in Word format, and saved on the intranet in a folder called CaseSolutions. Existing customer contact information is listed in ExistingCustomers.CSV. Case history information is saved in emails.

What outputs are needed?

Sage CRM has fantastic pre-built reports, charts and document templates, which you can tweak to fit your customer's business needs. A good starting point is to identify all the outputs that are generated as part of the existing business processes. Then review the existing Sage CRM reports, charts, quotes and orders to identify any customizations that you'll need to make or new reports and templates that you'll need to create.

Outputs from Sage CRM can also include data that's imported into other systems. For example, data saved in a custom entity called *Projects* could be extracted into a project management system, or Quotes data could be imported into an accounting system. Here are some example outputs and formats.

Business management outputs	Format
Month-on-month and week-on-week reports that provide insight into revenue and budget variance. Reports that detail marketing campaign costs, product costs, and service costs to provide insight into expenditure.	PDF reports
Forecast summary information	PDF reports that include charts
Real-time sales information	Dashboard with charts
Sales metrics that show detailed information about open, closed, won, and lost deals.	Dashboard with charts

Sales outputs	Format
Comparison of won opportunities, revenue generated, and targets achieved for similar sales reps.	Dashboard with charts
Mobile access to forecasts	PDF reports
Notification when an order goes into workflow if a third-party takes care of payment.	Email template and email alert

Marketing outputs	Format
Scheduled social media campaigns	Twitter posts
Drip marketing campaigns	SwiftPage outputs

Marketing outputs	Format
Accurate information about MailChimp statistics including opened, clicked links, bounced, unsubscribed and blocked emails.	PDF reports
Emails that provide future customers with useful product information to shorten the sales cycle.	Email template and automated emails

Customer service outputs	Format
Real-time information about bugs and patches, team members out of the office today, alerts of call spikes, and team specific news.	Yammer messages
Real-time product information including special offers and release dates.	RSS feeds and onscreen notifications
Detailed information about Agent Schedule Adherence, Average Handle Time, Active and Waiting Calls, and Call Resolution.	PDF reports
Prioritized list of cases assigned to each rep and up-do-date information about the rep's performance compared to the top performer.	Dashboard with charts

How will you launch the new system?

There are some practical considerations about getting the Sage CRM system up and running. When the system is ready, you'll need to launch it with enough support for users to ensure they are excited and confident about using it. Full user participation is vital to making the system a success.

It's also important to identify and train a system administrator who will maintain and administer the system once it's launched. At a minimum, this person should be able to change parameter settings and perform customizations that don't involve writing code. For example, creating users, changing screen and list layouts, building reports, adding fields, and setting up data imports. Customer involvement with the system will increase system adoption and reduce implementation costs.

Timing	Task	Key people / resources
Before the system is launched	Who will test the system?	Conduct your own testing and user testing to ensure the system is working as required.
	Who will administer the new system?	Identify and train a system administrator.
Launching the system	When will the new system be announced?	Based on time estimates for customizing and configuring the system, and the optimum date from a business prospective, establish the live date for the system. Key people are you and your team, the key stake holders, and the marketing team.
	How will the new system be announced?	For example, on the launch day, place a post card on each user's desk that announces the new system and tells users about a prize they can win when they log into it. Key people are the marketing team. The system administrator can run a Logged on Users report to see who has taken part.
After the system is launched	Customize on-screen coaching captions with user information	Customizing onscreen coaching The system administrator can customize on-screen coaching
	Roll out a training initiative	It's vital to train users to use the system. The training initiative can use existing Help and video resources provided by Sage. Identify who will conduct the training and the time scale involved. For example, you could ask all users to complete the Sage CRM eLearning over the course of a week and to watch a prescribed list of videos over the following week. Help center Video channel Community

Timing	Task	Key people / resources
	Workplace mentoring	Identify power users who can help coach other users and notify all users about who the power users are and when and how they can be contacted.
	Conduct post implementation review	This review should be mandatory. When the system has been in use for a specific period of time (for example, a month) run reports and interview key stake holders. The Activity reports and Administrator reports help you determine use of the system. Use validation metrics to establish if ROI has increased or decreased in terms of revenue, costs, and service. This is a chance to ensure the system is working appropriately and to identify any potential quick wins to increase system acceptance and uptake. You and your team should conduct this testing so you can customize or configure the system if necessary.
	Create a follow up campaign	When the system has been in use for three months, launch a follow up campaign to promote use. This could take the form of a deskdrop and competition where the user must complete tasks in the system (for example, run reports) to win a prize. Key people are the marketing team.
	Maintain the system	The system administrator must maintain the system conducting account management, end user system reviews, performance reviews, and implementing patches and upgrades.
	Support the system	Identify and implement an appropriate support package for the customer.

Customize the system

Use the information that you gathered in the overview of the business section to map the business requirements to Sage CRM entities and functionality and identify where you need to modify the system. Typically, you'll customize fields, selection lists, screens and tabs for the main entities. You might need to create a completely new entity. We'll guide you through the process of deciding what to customize and how to do it.

When customizing the system, it's useful to identify the different levels of work involved and what they mean to the ongoing support of the system.

- Configuration involves changing parameter settings.
- Customization is anything that doesn't involve writing code. For example, changing screen and list layouts, building reports, adding fields, and setting up data imports.
- Development is anything that does involve writing code.

It's a good idea to highlight anything that you feel might cause problems when upgrading the system so that the customer is aware of potential problems. This also helps you as an implementer to know what problems to look at during a system upgrade.

Entity overview

Data that users enter into Sage CRM is stored in records, and records are grouped into entities. While each record belongs to a Sage CRM entity, it's not completely correct to think of entities simply as database tables holding database records. While this is true some of the time, it can get a little more complicated. It's better to think of an entity as a business object that contains all the information a user needs to perform a particular action within Sage CRM. For example, a user who wants to enter a potential revenue generating sales deal creates a new record that belongs to the opportunity entity. This record includes information about the deal such as certainty of closing and potential revenue, but also references other relevant information such as details of the company that they'll strike the deal with (from the company entity), the contact person in that company (from the person entity), and products that they'll sell as part of the deal (from the products entity).

A good understanding of the existing entities combined with a clear picture of the data that's to be uploaded, helps you determine whether you can use the entities out-of-the-box or if you need to customize some entities to reflect your customer's unique data requirements.

Lead

- A lead represents unqualified information received from the corporate web site, trade shows, and purchased mailing lists. A lead exists outside the context of a company or person to prevent the Sage CRM system becoming overloaded with thousands of unclean, unqualified companies and people. When the lead is qualified and ready to be converted to an opportunity, a new company and person record are created. If the company and person already exist in the system, the user can match the lead details to the existing company and person record.
- If there are telesales inbound teams, or a high level of inbound inquiries, leads are a great way of holding unqualified information and ensures that the database is kept clean.
- Use leads to track a separate sales and engagement process for a telesales team.
- If the sales team generates high value opportunities, leads might not be required.

Company

- A company represents qualified information about clients, partners, industry contacts, and any company your customer deals with in the course of their business.
- Use the high level company summary for static company information to categorize, segment, or group the companies.
- Include industry related fields to describe the companies.

Person

- A person represents qualified information about any person your customer has a relationship with in a company that they deal with.
- Record data that allows your customer to build up a relationship with the individual. Capture things like interests and qualifications and use this information for targeting specific people.

Opportunity

- An opportunity tracks sales interest from a qualified lead through to closing the deal. It can be created directly by a sales representative or from the conversion of a marketing lead into an opportunity. An opportunity can be used to manage any process that can be tracked, such as memberships.
- An opportunity tracks sales interest from a qualified lead through to closing the deal. It can be created directly by a sales representative or from the conversion of a marketing lead into an opportunity.
- Use an opportunity to manage any process that can be tracked. For example, memberships. It's straightforward to translate the opportunity related captions to make these meaningful to a different process.

Custom entity

- A custom entity lets you extend Sage CRM beyond customer relationships and manage any area of the business. You can use custom entities to adapt Sage CRM to cover a vast range of industries such as property management, financial services, and investment companies.
- Before you create a new entity ensure the business requirement can't be met by customizing a core entity.
- Use custom entities to compliment core entities rather than replace them.
- Relate custom entities to core entities to add value or additional functionality to core entities.

Quote

- A quote estimates the price of a product or service and is usually created in the context of an opportunity.
- Quotes are useful if your customer has a small number of products and a simple pricing structure.

Order

- An order is a confirmed request by a company to purchase products or services. An order is usually created in the context of an opportunity.
- Orders are useful if your customer has a small number of products and a simple pricing structure.

Case

- A case is a customer service issue and 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 and tasks can be linked to one case.
- Use cases to manage after-sales queries, support tickets, and complaints.
- Use cases to manage any process that tracks the progression from stage 1 to 2 to 3 and record what was processed at each stage.

Customizing entities

Customizing entities	Help
Read the definition of each entity to determine which entities apply to the business.	Entity overview
Review the current business and identify the critical pieces of data that you want to record about each entity.	What are the existing process?
Map the data you want to upload to the existing entity fields. This helps you identify customizations that you need to make to the fields. Use the forms in the screen customization guide to define your customizations to the entity fields.	Screen customization guide
If the business doesn't fit into any of the existing entities, you can create a new entity using the Advanced Customization Wizard.	Creating a custom entity
Delete existing fields that you don't need.	Deleting a field
Create new fields if necessary.	Field customization
Add new fields or reposition fields on screens.	Screen customization
Configure field security 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.	Adding security types for a field
Specify required fields.	Accessing field security
Set default values for fields.	Field properties
Set values for selection lists or change existing selection list values.	Editing a field
Write scripts if necessary. For example, the following business rule can't be implemented using Field Level Security in the UI and must be implemented using field level scripting. "Only Support team members may change a company SLA field when the company is of type 'Customer." This is a development task.	Advanced screen customization
Delete existing tabs that you don't need.	Removing a tab from a tab group
Rename tabs if necessary.	Adding a new tab

Setting up users

You need business knowledge to set up system users with appropriate access rights that make sense for how they'll use the system and the information it contains.

What to consider before setting up users

- Identify the users planned for Sage CRM and look at their current business functions.
- Do you need resource users?
- How many named users and how many concurrent users are required?
- Can the users be broken into groups based on how they will use Sage CRM?
- Do you need to restrict sensitive information from certain users?
- Should Sage CRM teams be set up?
- Will you use user templates?
- Will you need information managers?
- Do you need to change the default user template?
- Are any additional templates required?
- Do you need to change the default value of any fields when setting up the user or user template?
- Do you need to manage security access rights?
- Are users located in different geographical areas?
- Do you need to set up security profiles?
- Do you need to set up territories?

User terminology

- A **team** is used to manage data security. For example, you could grant members of a particular team access to data that users in another team are unable to access.
- A **territory** further divides user rights. For example, you could grant users in the Europe territory view-only rights to all opportunities in the US territory. If security policies aren't implemented, territories act as a simple silent filter over existing security profiles. In other words, if a user doesn't

have view access rights to opportunities in their profile, the user doesn't see any opportunities, no matter what territory they're in. The silent filter of territories influences all areas of Sage CRM. This includes searching, reporting, and groups generation.

- A **profile** is a way of grouping users when defining access rights to data. For example, you could create a profile called Sales with rights to view, update, and insert companies, people, communications and opportunities, but with view-only rights to cases. You can assign this profile to all sales users, instead of setting up individual rights for each user. Any changes that you make to the profile are automatically applied to all users assigned to it.
- A **security policy** defines complex inter-territory security rights and exception handling.
- A **user template** defines the baseline settings for a new user. A template is useful when setting up new users who have a set of common characteristics such as the default language to be used, security access rights common to all users, and user preference settings.
- An **Info manager** is a power user with rights to perform specific system administration tasks, such as uploading templates or maintaining currency conversion rates.

How to set up users

Task	Help
Create a user template to define baseline settings for all new users. The template defines the default language, common security access rights, and user preference settings.	Creating a user template
Add at least one new security profile with restricted access rights. When you install Sage CRM without demo data, only the System Administrator security profile is created. This profile gives full access rights to view, update, insert, and delete all data. If you leave this profile assigned to all users, the system isn't very secure.	Adding a new security profile
Set up each user who needs access to the system with a logon ID, first name, last name, email address, phone number and extension.	Setting up a new user
Create a team for each group of users that perform a similar role.	Creating a new team
Assign users to the team. Examples of teams are Telesales, Marketing, and Credit Control. Teams help users assign, process, and report tasks, sales opportunities, and customer care cases. Most Sage CRM records can be assigned to an individual user and a team.	Assigning a user to a team
Create a territory profile for each group of users with the same rights to view, update, insert, or delete data.	• Adding a new territory • Sage CRM and Row Level Security

Task	Help
Specify a territory security policy. For example, users in the Europe territory could view all opportunities within the US territory, but be unable to update them. To create this additional layer of data security, set up a territory for Europe, one for the US, and so on. Territory security policies specify advanced inter-territory security rights and exception handling. Be aware that if a manager assigns a task to a user who doesn't have rights to the task territory, the user will never see the task and the manager doesn't receive a warning. The risk here is that the task falls through the cracks and is never completed.	Security policies
Create Info Manager users with additional rights, such as creating new reports or merging duplicate accounts.	Creating an Info Manager
Depending on your requirements, change the default user configuration settings that apply to all users. For example, you can bypass the system logon page using IIS Auto Login.	User Configuration Settings fields

Setting up currency

You must ensure the correct base currency, currency format, currency identifier (CID), and exchange rates are set. This is particularly important if you are integrating Sage CRM with another system so that data can be correctly synchronized between the two systems.

What to consider before setting up currency

- 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 updates.
- 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.

Currency terminology

- The **base currency** is the default currency against which all other currencies are calculated.
- **Precision** is the number of decimal places to which converted values in the associated currency are calculated.
- **Rate** is the conversion rate against the base currency.

How to set up currency

Task	Help
Enable multicurrency support if users require data in 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.	Enabling multicurrency support
Set up additional currencies and rates.	Setting up currencies and rates
Change the base currency to another currency in the system if necessary. You can't edit base currency details, so set the rate of the currency that will be the base currency to 1 before changing the base currency in the Configuration settings. You must manually change all existing exchange rates to reflect the new base.	Changing the base currency
Add new currency fields to tables and screens.	Creating a field
Change the currency symbol on the opportunities funnel if necessary.	

Configuring products

Products and price lists track the products and services that the business offers and the different prices at which they are sold.

What to consider before setting up products

- What products and product families are used in the sales cycle?
- Are products sold at different prices to different people?
- Are products sold in different units? For example, a single unit, a pack of six, a box, a crate?
- Are products sold in different geographical regions using different currencies?

Products terminology

- **Products** are the individual services or items that the business sells through opportunities and quotes.
- **Price lists** let the business sell a service or item at different prices. For example, you could create a wholesale price list and a retail price list.
- **Units of measure (UOM)** lets the business sell a product in single units or multiples. For examples, packs of six and packs of 12. Pricing can be applied to the UOM.

How to set up products

Task	Help
Gather information about products, product families, price lists, units of measure, and UOM prices that you need to add to the system. Determine the currencies in which the products will be sold.	
Configure product settings including how orders are formatted and the currencies in which products can be priced.	Product configuration fields
Create price lists.	Setting up price lists
Create UOM families.	Setting up units of measure families
Create UOMs within the UOM families.	Setting up units of measure
Create product families.	Setting up product families
Create products and specify product families, price lists, and UOMs for each product.	Setting up products in a matrix
To allow users create quotes and orders in multiple currencies, specify the currencies, and add individual prices for each currency.	Configuring products

Defining relationship types

Sage CRM comes with some pre-defined relationships. You can set up additional 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.

For example, to track contractors and the companies where they are currently active, create a Parent/Child relationship type on company and person.

What to consider before setting up relationships

- Select the parent/child relationship type for relationships where there is an obvious hierarchy or concept of ownership.
- 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. You should use verbs as the basis of the relationship name. For example, *Contractors working at Companies*.

Relationship terminology

All relationships between Sage CRM entities are **reciprocal** which means they can be viewed and set up from the context of each entity in the relationship.

How to set up relationships

Task	Help
Identify any new relationship types that are required and new views that are needed to generate reports based on these relationships.	
Set up new relationship types.	Adding new relationship types
Customize Search Select Advanced lists to include only the relevant columns on related entities.	Customizing related entities Search Select Advanced lists
Create new views to display related entity information in reports.	Reporting on related entities

Uploading data

You can make the most of existing customer data by uploading it into Sage CRM. Data upload is a utility that lets you import company, person, or lead data held in MS Excel or Comma Separated Value (CSV) file format.

What to consider before uploading data

- Will you use bulk import?
- Will you import leads, companies, and person data?
- Will you use the RESTful API to upload data to custom entities?
- When setting up match rules consider the following:
  - The fields that you set match rules on are used to deduplicate when a user adds or edits the record.
  - You can set only one match rule per table column. For example, one match rule for Company Name and one type of match rule for Address City.
  - Fields on the deduplication search screens are based on logical ANDs. So the more information a user enters into the deduplication search screen, the less likely it is that the system will detect a duplicate, because all search criteria entered must be met. For example, company name and address and city and postcode.

Data upload terminology

- **Deduplication** checks existing records to ensure that the new company or person record that the user enters doesn't already exist in the system.
- **Match rules** determine the criteria used to compare data in the Dedupe Search Screen with Sage CRM records.
- **Company Name Clean Up** enhances deduplication when companies are added manually or using data upload. It makes it easier to detect duplicate companies by applying preset rules that remove or replace words within the company name.

How to upload data

Task	Help
Save the data in MS Excel or CSV file format.	
Enable deduplication.	Enabling deduplication
Add or remove fields from deduplication screens if necessary.	Customizing deduplication screens
Set up match rules for deduplication.	Setting up match rules
Create Company Name clean up lists to clean up data before importing.	• Creating a Company Name Cleanup remove list • Creating a Company Name Cleanup replace list
Ensure the data meets the Sage CRM import file requirements. When the import file is in the right format, you'll have less rework, duplication, and data clean-up after the import.	Data upload file requirements
Identify required fields in Sage CRM and ensure values for these fields are included in the data upload.	
Upload the data to Sage CRM.	Steps to upload data
As part of the upload, configure mappings and dedupe rules.	Step 3: Configure mapping Step 4: Configure deduplication
Optionally, to load user and security territories into Sage CRM, map the user and territory fields to the equivalent Sage CRM fields while configuring the data upload.	Step 3: Configure mapping
Review the review the imported data and check mappings.	Step 5: Preview and create records
Make any required changes such as creating clean up lists to reduce duplicate data.	• Creating a Company Name Cleanup remove list • Creating a Company Name Cleanup replace list

Optimizing key word search

Keyword Search allows users search for keywords across all primary entities at the same time. Keyword searches can also feature wildcard characters to encompass a variety of text and characters to check against in the database.

What to consider before optimizing key word search

- Do you need to modify an existing view used by keyword search?
- Have you created any custom entities that require a new view for keyword search?
- You can specify only one keyword search view per primary entity to ensure the keyword search doesn't return the same record twice in a single set of search results.

Key word search terminology

The **CRM Indexer service** creates an index of all database records and periodically updates this index to include records that have been added since the last update.

How to optimize key word search

Task	Help
Enable the CRM Indexer Service and keyword search functionality, and specify how often the indexer checks for new data to be included in searches.	Keyword Search system settings
Create a new view to be used by keyword search for any custom entities that you've created.	Creating a view for Keyword Search

Setting up the business calendar

A business calendar defines standard business days and work times. You can 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 an SLA. 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.

What to consider before setting up the business calendar

- What are the standard work days and work times for the business?
- How many hours are in the working day for the business?
- Will the business calendar be used with other timings such as holiday sets and case duration to trigger notifications and escalations about SLAs?

Business calendar terminology

- The **Standard Working Week** business calendar consists of a five-day week, Monday to Friday. Work begins at 9:00 each day and ends at 17:30.
- The **Seven Day Week** business calendar consists of a seven-day week, Monday to Sunday. Work begins at 9:00 AM each day and ends at 17:30.

How to set up the business calendar

Task	Help
If the working hours and working days for the business are different to the Standard Working week business calendar, create a new calendar and set it as the default.	Creating a user template

Building reports

Reports produce figures and charts, which can be used to forecast sales, identify cross-sell and up-sell opportunities, and measure and reward user performance.

What to consider before building reports

- Look at existing reports. Based on the key data identified, are any changes required to reports?
- Outline new reports that you need to create.
- Do you require groups?
- When you modify or set up new reports, you might not have access to all the columns you need from a single report source. In this case you might need to create a new report view. For example, you could generate a Communication list report based on the Communication Summary, which also shows information about related cases. This involves coding. For more information, see the Developer Help.
- Reports that are based on forecasted sales require end user proficiency in setting up forecasts. For example, the Actual vs Target sales report. This can be a complicated area so ensure you include Sales Forecasting in your user training.

Reports terminology

- A **group** is a filtered list of records. Use groups to create, modify, and save lists of people, companies, leads, opportunities, quotes, and orders based on defined filter criteria.
- A **view** specifies the tables from which report data is retrieved.

How to build reports

Task	Help
Create a new report.	Creating a report
Edit existing report categories or create a new category.	• Creating a report category • Moving a report to a different category
Create a new view if required.	Creating a view for reports
Control access to report categories. You can restrict a user's access to reports using **Reports** in the user security panel. You can also restrict a user's access to a specific report category by hiding the category tab.	• Security profile fields • Editing system menu tab groups
When you create a new view, it's displayed in the **Source View** dropdown list as an untranslated code, for example vCommCase. Translate this into more user friendly language, such as *Communication with Cases*.	Translations and Help

Customizing dashboards

Dashboards provide an overview of information for a user's day-to-day work and provide a quick path to the user's most frequently used Sage CRM screens.

What to consider before customizing dashboards

- Who will use the dashboard?
- Will the dashboard be assigned to many users or just an individual user? If the dashboard will be assigned to many users, you must first create a template and then a dashboard.
- Do you want to filter dashboards on the current user. If yes, filter the report by the current user. This adds a checkbox when the user is creating the report.
- Review the dashboards provided in Sage CRM and decide if you need to modify any existing dashboards or create any new dashboards.
- What default dashboard should appear when a user logs on?

Dashboards terminology

The **default dashboard** is the first dashboard displayed when a user logs on.

How to customize dashboards

Task	Help
Set the default dashboard.	Setting a default dashboard
Create a dashboard template.	Adding a dashboard template
Assign dashboard templates to a user or team.	Assigning users to a dashboard template
Create a new dashboard.	Creating a new dashboard
Modify dashboard gadgets.	Modifying gadgets

Setting up a 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.

When you talk about workflows with a customer, be sure the customer understands that the workflow should support business processes, not replicate them. Workflows that are too prescriptive actually prevent people from using the system rather than helping them to complete their tasks.

What to consider before setting up a workflow

- Are the ready-to-use Sage CRM workflows for leads, opportunities, cases and solutions applicable to the business processes?
- What type of notifications do your users require?
- Will the workflow be cross-entity? A workflow process can involve work on more than one entity. For example, workflow on a case could include a check on the status of the SLA of the parent company record. Depending on that status, a workflow action on a case record raised against the company might not proceed if the company has the wrong SLA.

Workflow terminology

A workflow is an automated process with actions and rules. A workflow can be in one of several **states**. The state determines the workflow actions that are available to the user. When a rule is triggered, the workflow state usually changes and a new set of actions becomes available. For example, when a user creates a new opportunity using workflow, the state is *Start*, when the user enters contact information and links it to the opportunity, the state becomes *Lead*, and when the user increases the opportunity certainty, the state becomes *Qualified*.

How to set up a workflow

Task	Help
Review the ready-to-use Sage CRM workflows for leads, opportunities, cases and solutions to determine if they are suitable for the business processes.	About workflow
Review workflow and escalation settings and make any required changes. For example, you can specify that high priority reminder messages are sent by SMS. Or you might want to switch off workflow on a lead, opportunity, case or solution so you can edit the summary screen for that entity.	Configuring workflow and escalation rule behavior
If required, make changes to the ready-to-use workflows.	Editing a workflow
Create a new workflow and add states and rules.	Building a workflow

Customizing email and document templates

Sage CRM comes with a number of sample templates for emails, quotes, and orders that you can customize with company information such as a logo and contact details.

What to consider before customizing document templates

- Identify documents that can be saved in Sage CRM as shared resources and used as email attachments.
- Are there any email aliases required?
- Will your customer need quote and order templates?
- Does your customer have a logo to add to the templates?
- Will there be multiple email templates?
- Does your customer require mail merge?
- Do you need to create a new mail merge view?
- Will users need to create Word documents from mail merge or PDF documents only?

Document templates terminology

- The **CRM plugin** lets users drag and drop documents into Sage CRM and edit documents.
- A **Mail Merge view** shows all the fields on a particular entity that can be included in a mail merge template.
- 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.

How to customize document templates

Task	Help
Download the CRM plugin.	Downloading the CRM plugin
Import Word templates to Sage CRM.	Uploading a Word document template or image file
Modify standard letter templates to include company information and required merge fields.	• Creating a template using the text editor • Creating a Word template
Edit current quote and order templates.	Editing a shared template
Create a new template if necessary.	Creating a template using the text editor
Customize standard email templates or add new templates.	Setting up email templates
Add email signature templates for sending emails from Sage CRM.	Setting up email templates
If necessary, modify mail merge views. For example, to add a field to a document template that's not currently available from the Mail Merge dialog box in Word, you must first customize the mail merge view.	Editing a view
Enable Merge to Word if required.	Security profile fields

Setting up email

You can configure email to allow users send and receive emails directly from Sage CRM. This means they don’t need to retype or remember contact email addresses that are already in the system and they can store emails with a customer record for future reference. More importantly, users can convert inbound or outbound emails directly to a customer service case, a sales opportunity, or new lead as appropriate. Integrating email and scheduling capabilities with Sage CRM data is key to boosting productivity and ensuring a 360 degree view of the business.

When you're deciding on the appropriate configuration for handling email, your choices should be influenced by how your customer wants to send email and record outbound emails.

What to consider before setting up email

- What email client is your customer currently using?
- Do you need to integrate the existing email client with Sage CRM? You must use Internet Explorer to send Sage CRM email through Outlook.
- Will your users need default email templates?
- Do users need to file inbound emails with associated customer records?
- Are rulesets required?

Email terminology

- **Standard Sage CRM** email 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** 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 a user's Outlook mailbox into Sage CRM.
- **Sage CRM Exchange Integration** is an integration between Sage CRM and Microsoft Exchange Server. There is no synchronization to individual Outlook clients. The synchronization runs in the background and does not require users to trigger synchronization; it continues even when Outlook clients are closed.

How to set up email

Task	Help
Configure standard email, enable the embedded email editor, and specify the method used to send emails.	Configuring standard email
Specify a list of Sage CRM accounts that can be used for sending emails.	Setting email aliases
Set up email templates to save users time and effort.	Setting up email templates
Enable and configure Email Management.	Configuring Email Management
Set up rulesets so that specific actions are applied to particular emails.	Adding rulesets to Email Management
Set up Exchange Integration if applicable.	Setting up Exchange Integration
Install the Lite Outlook Plugin if applicable.	Configuring Lite Outlook Integration
Synchronize Exchange and Sage CRM.	Synchronizing Exchange and Sage CRM