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info

Newsletter for SageCRM

ADSS Global
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What's Inside

Headline News

SageCRM and SageCRM.com have been selected as winners of the 2008 *Top 15 CRM Small & Medium Business Software Award* by ISM Inc.

ISM Inc. offers strategic advisor services to organizations planning and implementing Customer Relationship Management. Each product is rigorously tested during ISM's evaluation using 217 selection criteria. SageCRM received the award for the sixth consecutive year.

E-mail Management Options

For customer and prospect-facing teams, e-mail can be an essential tool for effective and timely communications. However e-mail in-boxes can quickly get cluttered and systems can bog down. Automating the process of recording both inbound and outbound e-mail within your Customer Relationship Management (CRM) software can be a huge time-saver for your teams. With SageCRM, you don't have to worry about maintaining records of customer interactions—they all can be recorded automatically. Let's take a look at the options for automating e-mail management.

E-mail Configuration Options

An important consideration in managing your e-mail is the method you choose for sending and recording outbound e-mail. You can choose to use the SageCRM Embedded E-mail Editor, Microsoft Outlook, or a combination of the two.

In each case, you will create your e-mail by clicking on the e-mail hyperlink in a Person or Company summary page. If you chose the SageCRM Embedded E-mail Editor, a new window is displayed, containing all the fields and tools associated with a typical e-mail interface. When you have finished typing in your text, you simply click on the *Send E-mail* button. If you choose to send e-mail with Microsoft Outlook, the e-mail hyperlink launches the Outlook application, with name of the recipient automatically entered in the *To* field.

The Embedded E-mail Editor and Outlook are not mutually exclusive—you can use both. When you are set up to use both and click the e-mail hyperlink, the Embedded E-mail Editor interface displays in a separate frame in the lower half of the screen. Two buttons are available for sending the e-mail: *Send E-mail* and *Send Using Outlook*. You can create your e-mail using the Embedded E-mail Editor and then choose to *Send Using Outlook*. All the entered material is then transferred into the launched e-mail application.

Recording Outbound E-mail

Recording e-mail sent to contacts or companies is essential for keeping a complete history of communications with a given customer or prospect.

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E-mail Management Options

(continued from cover)

You can use one of two tools to file dispatched e-mail: the built-in SageCRM functionality or the E-mail Management service.

The key difference between the two is that the built-in tool only tracks activity that takes place within the SageCRM system. If you select this option and use the Embedded E-mail Editor to send an e-mail, the system will record the entire content of the e-mail.

The built-in tool cannot track changes made outside the system. If you send e-mail using Microsoft Outlook, what is recorded on the Communications tab depends on which route to Outlook you took:

- If you have only Outlook selected as your e-mail editor, Outlook launches directly in a new window when you click on an e-mail hyperlink. The built-in tool does not have a chance to record the mail, which means the message will not be saved in SageCRM.
- If you select both Outlook and the Embedded E-mail Editor, the SageCRM interface displays when you click on an e-mail hyperlink. The interface features two buttons for sending an e-mail. If you then click on the *Send Using Outlook* button, the message will be recorded in SageCRM. However, only the text written before the button is clicked will be stored—additions and changes made within Microsoft Outlook will not be recorded.

E-mail Management Service

When enabled, the SageCRM E-mail Management service processes inbound and outbound e-mail according to predefined business rules. E-mail Management works with both the embedded E-mail Editor or Microsoft Outlook. It also can be used to transfer inbound mails in your Outlook mailbox into your SageCRM system. E-mail Management functionality is installed automatically, but requires the completion of some setup tasks to enable it for use.

If you choose to use E-mail Management, the following functionality is available:

- Send outbound e-mail from either within or outside SageCRM, and have the e-mail record saved in SageCRM. This is handled by sending a blind carbon copy (BCC) to the Mail Manager Server Filing Address, which then follows your defined business rules to determine where to put the e-mail record in SageCRM.
- Automatically file in-bound e-mail from any mail system (including MS Outlook) in the correct customer record.
- Save all attachments to filed e-mail.
- Specify multiple e-mail addresses when filing inbound and outbound e-mail.

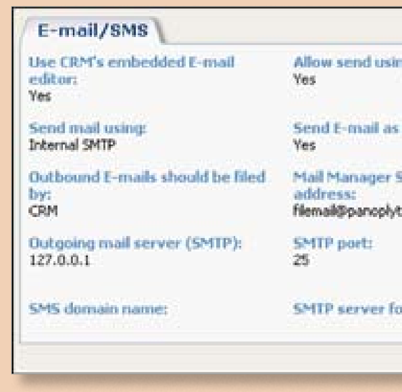
Incoming E-mail Options

The options you select in the E-mail Configuration screen do not affect how you deal with incoming e-mail because messages are not delivered to the SageCRM system but to your chosen mail client (such as Outlook). If you are using the E-mail Management service you can forward e-mail to the *Mail Manager Server Filing Address* for filing. Alternatively, you can use the File E-mail option by installing and using the SageCRM plug-in for Microsoft Outlook.

Using SageCRM Within Outlook

By downloading and installing the Outlook Plugin, you can work in SageCRM from within Outlook. Once the Outlook Plugin is installed, Outlook will have a SageCRM Logon page and a SageCRM toolbar. The toolbar contains buttons for: synchronizing tasks and appointments; viewing and resolving conflicts; adding Outlook contacts to SageCRM; viewing SageCRM contacts; and filing single or multiple e-mail records with the Company or Person record in SageCRM.

ZOOM IN



A typical SageCRM e-mail setup, integrating with Outlook for outbound e-mail, and saving outbound e-mail within SageCRM.

SageCRM has been designed to give you flexibility and power in the management of e-mail, from both within SageCRM and from within Outlook. Call us with your questions.

((Tips & Tricks))

Version 6.1 Now Available for SageCRM.com Customers

Previously available only for SageCRM, Version 6.1 now is available for SageCRM.com customers. Version 6.1 provides enhanced integration with Microsoft Office and support for Vista. Increase productivity with Enhanced Microsoft Outlook integration, including improved synchronization, conflict resolution capabilities, access to meeting organizer from the SageCRM screen, file and view e-mail capabilities, and a new Outlook installation wizard. To see what's new in Version 6.1, you can view one of the Sage Software recorded Web casts. To register, click here.

Sage CRM Solutions—2010 Strategy

Selecting and implementing a CRM solution is a big project. Analyzing and documenting your needs, choosing the right solution, and implementing it in a way that supports and enhances your business processes takes time and money. With all the effort required, it becomes especially important to choose a solution and software vendor that will develop and expand well into the future as your organization grows.

Sage Software published the **Sage CRM Solutions 2010 Strategy** white paper. This document not only outlines the future directions of Sage CRM Solutions, it also clearly demonstrates the company's understanding of customer needs.

The Sage CRM 2010 Strategy is focused on three strategic objectives:

1. Optimize Sage CRM Solutions using a business requirements-driven model.
2. Deliver interoperability; an *anywhere workforce experience* and connected front-office and back-office solutions.
3. Implement a comprehensive technology strategy that leverages standards and emerging trends, including Web 2.0.

Business-Requirements Driven

Through in-depth research and dialogue with its large and diverse customer base, Sage Software has acquired a deep understanding of the many ways in which organizations interact with customers. These range from the one-to-one and one-to-many interaction models focused on individual users and departmental teams managing relationships with customers, to the many-to-one and many-to-many models requiring process automation for cross functional team collaboration. The Sage CRM solutions will be enhanced to meet the needs of all methods of customer interaction.

Interoperability

The Sage Software strategy calls for interoperability and migration between contact management and CRM solutions. Individuals or sales teams may opt for a contact management or CRM solution based on their customer interaction model. However, at some point in an organization's evolution, other departments may need to interact with the same contacts and customers. Sage Software has strength in both contact management and CRM solutions. Sage CRM Solutions 2010 strategy will drive interoperability between ACT! contact management and SageCRM, and Sage SalesLogix. Users in various departments can use different products, yet interact through synchronized or shared databases.

For maximum productivity, CRM users need anytime access to critical information from a variety of locations and devices. The Sage Software *anywhere workforce experience* will supply solutions as both services and applications, with on-premise and on-demand delivery choices. Combinations of applications and services will provide a rich user experience, delivering relevant functionality when connected, disconnected, or working from a mobile device.

With tens of thousands of CRM customers and several million ERP customers, Sage Software is uniquely positioned to understand the needs of small to mid-size businesses and divisions of enterprises. It recognizes that businesses require depth of functionality in both CRM and ERP solutions, and also seamless integration between them. The wealth of data in the back office must be delivered in a meaningful interface to enable the front office to be more effective. Sage CRM Solutions will be increasingly optimized to deliver relevant back office data to front office staff for use in their interactions with prospects or customers.

Technology Strategy

The Sage CRM Solutions 2010 Strategy will implement a comprehensive technology strategy that leverages standards and emerging trends, including Web 2.0. It provides a plan and architecture for the development of compelling CRM services, and is supported by a practical program for adoption of common components and frameworks across all Sage CRM solutions. The list of common components will likely encompass a common look and feel, common approach to business intelligence, shared data access components for high performance, and a common approach to workflow management.

Conclusion

Sage CRM Solutions 2010 Strategy is designed to deliver near-term benefits for customers. The strategy is envisioned to include innovations this year, with additional capabilities on a tightly sequenced schedule through 2010. As a result, organizations that use Sage CRM Solutions can expect to enjoy:

- Solutions that are purpose-built to meet their needs.
- Synergy among Sage Software CRM, ERP, and vertical products.
- Enhanced productivity and cross-organizational collaboration.
- Streamlined, end-to-end business processes
- Unsurpassed flexibility with a combination of on-premise and on-demand delivery options.

Please give us a call for more information or to receive a copy of the white paper.

IN THE SPOTLIGHT:

Enabling Mobile Access To SageCRM

Whether your team is in the office, on the road, or working from home, SageCRM Mobile Access allows them to be productive and efficient. Here we will give you the practical steps needed to get up and running on SageCRM Mobile Access.

Supported Devices

SageCRM Mobile Access works on the following devices:

- BlackBerry Pearl Model 8100.
- PDA capable of connecting to the company's CRM system via the Internet or LAN.
- WAP Phone configured to connect to the company's CRM system through a WAP gateway. Most mobile phone providers offer a WAP gateway service.

Enabling Mobile Access

To use Mobile Access, each user must be configured to allow access to SageCRM and your Network Administrator must set up URLs for accessing SageCRM from inside and outside the corporate network.

To activate users:

1. Access Administration/Users/Users.
2. Select the hyperlink of a user, and select the Change Action button.
3. Set the PDA/WAP Access field to *True* and *Save*.

The URL for access from inside the corporate network is typically in the following format: http://yourserver/yourapp. The URL for access from outside the corporate network typically includes your company's IP address. The URL is normally in the following format: http://companyipaddress/yourserver/yourapp.

Logging On

For logging on with a BlackBerry or PDA, open your Web browser and enter the appropriate URL. The Logon page is displayed. Enter your User Name and Password and click the Log On button.

To log on from your WAP-enabled phone, enter the appropriate URL. Bookmark the link. Select the Logon edit box, and enter your Logon ID and press the left-hand button below *OK*. When the CRM Logon page is displayed, enter your Password and click on the left-hand button. Scroll down to select the Logon link.

Setup For SageCRM.com

To setup SageCRM Mobile access for SageCRM.com users, activate the mobile client for each user by selecting the *Access SageCRM via a Mobile Client* option under administration options.

Then locate the instance name for a particular user by navigating to the System Help Main Menu, Account Update Tab, Web Service Connection String. The instance name should appear in the string and will look like this: https://northamerica.sagecrm.com/sagesoftware487cgkbph/eware.dll/webservices/CRMwebservice.wsdl. In this example, the portion of the URL string that reads *sagesoftware487cgkbph* is the instance name.

Next, direct the user to the following URL: http://northamerica.sagecrm.com//eware.dll/do? The user will need to insert their instance name from the Web Service Connection String into the URL where "" appears.

Give us a call with your questions or for assistance setting up your mobile users.

Request More Information

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