

User Guide and Expectations for the use of Sage CRM within the Example Company

This document addresses the ways in which the Sage CRM system is used at EXAMPLE. While certain sections of this document may not directly apply to your responsibilities at this organization, it is very important that you understand the entire 'flow' of the system. Thoroughly reviewing this document and trying out the system in advance of any one-on-one training will take you 60 to 90 minutes.

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Section 1: Accessing Sage CRM

URL: <https://na.sagecrm.com/logon/en/>

User Name: your EXAMPLE email address

Password: Unless you have been informed otherwise, your password has been set to 'Password1'

Section 2: Definitions of Key terms within Sage

1. **Companies:** The organizations (pharmacies or medical clinics). Companies are made up of people. It is on the company summary screen in Sage that we profile the Wholesaler and Distribution Center.
2. **People:** The individuals that might recommend our products (Pharmacists & MDs). On the person summary screen we profile people; EXAMPLE Type, DEA, State License, etc. Communications and 'Samples' are created under a person in Sage.
3. **Communications:** A record indicating a communication has taken place. Communications include; appointments, calls and emails. Communication records within Sage are date stamped and reference the EXAMPLE staff member that created the communication.

Section 3: Quick Training Videos

1. Specific User Training Video including; accessing, navigating and a complete breakdown of the process of recording communications under people, adding Samples and Merging People into Companies...
<http://www.screencast.com/t/OPcfVzv92R9f>
2. Understanding communications relative to Sage CRM... <http://www.screencast.com/t/A10JxJ0IghF>
3. Working in conjunction with MS Outlook...
 - 3.1. Installing the Outlook Plugin... <http://www.screencast.com/t/pATwBRhH>
 - 3.2. Using the Outlook Plugin... <http://www.screencast.com/t/KD4Uau5FDliH>

Section 4: Expectations for the use of Sage CRM at EXAMPLE

1. You are responsible for updating contact information related to the people and companies in your territory
2. All requests for Samples must be recorded in Sage
3. You are responsible for managing and updating the status of all Sample Requests
4. All in-person meetings must be recorded in Sage
5. Tangible emails (inbound or outbound) related to your opportunities need to be filed into CRM from Outlook or sent directly from CRM. Specifically, any emails that mentions money OR an admission of acceptance MUST go into CRM.

Section 5: Support, Training & Requests for Enhancements

Michele Shirley is your primary contact with any questions you have related to the use of Sage CRM; please contact her if you have any questions. If you have suggestions for this system, please ensure you submit them in email format to mshiley@EXAMPLEweb.com