



Know how to get started with your CRM.

All you need to know about configuring your system.

- Setting up Admin account

- Creating and managing users

- Email settings

- Setting up Mail box

ActionCOACH CRM

What is a CRM?

Every organization has a customer list, assigns opportunities to sales representatives, or handles customer support cases, they are undertaking CRM-related activities. CRM applications standardize, automate, and share these activities across organizations to improve how companies interact with their customers.

Why ActionCOACH CRM?

Benefits you can derive from the **ActionCoach CRM**:

- Isolate the prospects and present them with compelling marketing offers by running **Campaigns**
- Review detailed results to assess the success of a campaign
- Track each prospect through the system with **Customized Workflows**
- Effectively manage the Leads, through automated workflows
- Ensure better communication within the team or organization by managing **Activities** and sharing **Calendar**
- Have your own built in **Email** module
- Easy to use features
- **Dashlets** on home page provide you a Quick view to you daily schedule and can be customized
- **Customize** the look of your CRM
- All the modules are **well linked**, changes in a module is reflected in the other
- **Reports** Module allows you to customize reports to get desired information

ActionCOACH CRM is designed to help you manage customer accounts through each step of their lifecycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Because many of these steps are interrelated, each module displays related information.

Let us get you started...

Welcome to
ActionCOACH
business coaching

Please enter your user name and password:

User Name: (admin)

Password: (demo) [Options](#)

A view of how you're CRM looks like and some features:

Welcome, Jerry [Logout] | [My Account](#) | [Employees](#) | [Admin](#) | [Support](#) | [Training](#) | [ActionMembers](#) | [About](#) | Sitemap

Module Tabs (My Account, Employees, Admin, Support, Training, ActionMembers, About)

System Tabs (Home, Active Workflows, Dashboard, Calendar, Activities, Emails, Leads)

Shortcuts Panel (Create Contact, Enter Business Card, Create Account, Create Lead, Create Opportunity, Schedule Meeting, Schedule Call, Create Task, Compose Email)

View last actions (Last Viewed: Jerry Akers, tele marketing, Testing By Akk, Kelly Dyer, Mr. Sankalp attendee, Test Campaign, test list, Testing)

Dashlets (My Assigned Active Workflows, My Meetings, My Open Cases)

My Assigned Active Workflows

Workflow Name	Process Status	
Akers	Step2	<input type="checkbox"/> <input type="checkbox"/>
Bob Jones	Step3	<input type="checkbox"/> <input type="checkbox"/>
Crystal Graham	Step1	<input type="checkbox"/> <input type="checkbox"/>
John Smith	Step1	<input type="checkbox"/> <input type="checkbox"/>
marisa gordon	Step3	<input type="checkbox"/> <input type="checkbox"/>

My Meetings

Close	Subject	Duration	Start Date	Accept?	
<input type="checkbox"/>	Complete the sale	0h15m	10/14/2008 14:49	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Long Meeting	5h00m	10/23/2008 08:30	Accepted	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	9:15 meeting test	0h15m	10/23/2008 09:00	Accepted	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	lunch with Joe	0h15m	10/27/2008 00:00	Accepted	<input type="checkbox"/> <input type="checkbox"/>

System Tabs: The System tabs above allow you to configure system settings for your account.

- My Account
- Employees
- Admin
- Support
- Training

Module Tabs: The Module tabs give you access to individual modules and their functions.

- Home
- Active Workflows
- Dashboard
- Calendar
- Activities
- Emails
- Leads

Last viewed: You can view the last action performed.

Shortcuts: The left panel is found in all the modules allowing easy access to most functions.

Dashlets: They are a quick way to access your current assignments and pending work.

Configuration

1.1 My Account

Make changes to your account. Every user has access to their account settings through this tab.

User Settings:

- assign rights; whether group or portal user
- determine whether a notification mail is to be sent
- select the delimiter char to be used in case of data transfer

User Settings		
Administrator	<input checked="" type="checkbox"/>	Grants administrator privileges to this user
Group User	<input type="checkbox"/>	Act as a group user. This user cannot login through the Sugar web interface. This user is only used for assigning items to a group via Inbound Email functionality.
Portal Only User	<input type="checkbox"/>	Act as a portal user. This user cannot login through the Sugar web interface. This user is only used for portal web services. Normal users cannot be used for portal web services.
Notify on Assignment	<input checked="" type="checkbox"/>	Receive an email notification when a record is assigned to you.
Show gridlines	<input type="checkbox"/>	Controls gridlines on detail views
Display reminder?	<input type="checkbox"/>	Issue a reminder of an upcoming call or meeting
Mail Merge	<input type="checkbox"/>	Enable Mail Merge (Mail Merge must also be enabled by the system administrator in Configure Settings)
Export Delimiter	<input type="text" value=","/>	Specify the character(s) used to delimit exported data.
Import/Export Character Set	<input type="text" value="UTF-8"/>	Choose the character set used in your locale. This property will be used for data imports, outbound emails, .csv exports, PDF generation, and for vCard generation.
Show Full Name	<input type="checkbox"/>	Display a User's full name instead of their login name

Locale Settings:

- choose your date and time format
- choose your time zone and currency
- select how names need to appear

Locale Settings		
Date format	<input type="text" value="12/23/2006"/>	Set the display format for date stamps
Time Format	<input type="text" value="23:00"/>	Set the display format for time stamps
Time zone	<input type="text" value="America/New York(GMT-5) (+DST)"/>	Set the current time zone
Time zone prompt	<input type="checkbox"/>	Check to prompt user for time zone confirmation on login.
Currency	<input type="text" value="US Dollars : \$"/>	Select the default currency
Currency Significant Digits:	<input type="text" value="2"/>	
Example:	<input type="text" value="\$123,456,789.00"/>	
1000s separator	<input type="text" value=","/>	Character used to separate thousands
Decimal symbol	<input type="text" value="."/>	Character used to separate decimal portion
Name Display Format:	<input type="text" value="s f l"/>	Set how names will be displayed. "s" Salutation "f" First Name "l" Last Name
Example:	<input type="text" value="Mr. John Doe"/>	

User information:

- choose the below settings for the user
- enter contact details

User Information		All contact details	
Employee Status	<input type="text" value="Active"/>		
Title	<input type="text" value="Administrator"/>	Office Phone	<input type="text"/>
Department	<input type="text"/>	Mobile	<input type="text"/>
Reports to	<input type="text"/> <input type="button" value="Select"/>	Other Phone	<input type="text"/>
		Fax	<input type="text"/>
IM Type	<input type="text" value="-None-"/>	Home Phone	<input type="text"/>
Notes	<input type="text"/>		
		IM Name	<input type="text"/>

Layout Options:

- customize tabs that you want to hide or remove
- customize the number of tabs and subtabs

Layout Options

Display or Hide tabs

Choose which tabs are displayed

Edit Tabs

Display Tabs Hide Tabs Admin Remove Tabs

Number of tabs: Number of tabs shown at the top of the page before an overflow menu appears.

Number of subtabs: Number of subtabs shown per tab before an overflow menu appears.

Subpanel Tabs: In Detail Views, group Subpanels into tabs and display one tab at a time.

Subpanel Links: In Detail Views, display a row of Subpanel shortcut links.

Last Viewed on side: Display the Last Viewed bar on the side if checked. Otherwise it goes on top. *Only affects themes that support this option.*

Shortcuts on top: Display the Shortcuts bar on top if checked. Otherwise it goes on the side. *Only affects themes that support this option.*

Navigation: View modules grouped under tab categories or view modules by distinct tabs for each module. *Only affects themes that support this option.*

Email Options:

- enter email address and set it as primary; primary address will be picked as default

Email Options

Primary Reply-to




[+ Add Address](#)

Email client:








NOTE: if you are importing the contacts from a data source and the email is not selected as primary then it will not be picked by the system as a primary email. For you to make the email primary delete the email, add it again and save it. In a campaign emails will be sent out to the primary email address only.



1.2 ADMIN:





The Admin tab is accessible to any user with Admin rights to make system level changes. An admin can create new Users, assign them roles and determine their settings.






Sugar Network			
<p>Within the Support Portal, access the SugarCRM forums and Sugar Wiki, search FAQs (Frequently Asked Questions), download the latest Sugar version, buy network subscriptions, file and research reported bugs and request new features.</p>			
 Sugar Support Portal	Access your personalized portal for technical support and more	 Online Documentation	Get end-user and administrator documentation
 Sugar Updates	Check for latest version		

Sugar Network: provides you links to access the documentation, sugar guides, support portal from within the CRM and other support features.

System			
<p>Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their My Accounts page.</p>			
 System Settings	Configure system-wide settings	 Scheduler	Set up scheduled events
 Currencies	Set up currencies and currency rates	 Locale Settings	Set default localization settings for your system
 Tracker Settings	Enable/Disable tracking	 Sugar Feed Settings	Enable User Feed and select modules to post updates
 Connector Settings	Manage connector settings		

Users			
<p>Create, edit, activate and deactivate users in Sugar. Create and manage teams.</p>			
 User Management	Manage user accounts and passwords	 Role Management	Manage role membership and properties

Email			
<p>Manage outbound and inbound emails. The email settings must be configured in order to enable users to send out email and newsletter campaigns.</p>			
 Email Settings	Configure email settings	 Manage Email Queue	Manage the outbound email queue
 Inbound Email	Set up mail accounts to be monitored for inbound email	 Manage campaign email settings	Campaign Email Settings.

Developer Tools			
<p>Create and edit modules and module layouts, manage standard and custom fields and configure tabs.</p>			
 Studio	Edit Dropdowns, Custom Fields, Layouts and Labels	 Portal	Add tabs which can display any web site
 Configure Tabs	Choose which tabs are displayed system-wide	 Configure Group Tabs	Create and edit groupings of tabs
 Rename Tabs	Change the label of the tabs		

* The New Developer Tool allows you to easily customize the layout of you CRM.

1.2.1 System Settings:

Allows the user to configure system-wide settings, that apply to all users in your organization. Users can override some default settings, such as the date time format, on their My Accounts page.

- Choose items to be displayed per page in Listview and Subpanel.
- Choose maximum number of **Dashlets** on Home page
- Customize name of the system
- Customize your own logo and other system settings


Save Restore Cancel

Customize your Interface

User Interface

Listview items per page:	<input type="text" value="20"/>	Subpanel items per page:	<input type="text" value="10"/>
Display server response times:	<input checked="" type="checkbox"/>	Display tabs on login screen:	<input type="checkbox"/>
Prevent user customizable Homepage layout:	<input type="checkbox"/>	Prevent user customizable subpanel layout:	<input type="checkbox"/>
Maximum number of Dashlets on Homepage:	<input type="text" value="20"/>	Show Full Name (not Login):	<input type="checkbox"/>
System Name:	<input type="text" value="ActionCOACH CRM -"/>		

Logos

Current logo: 

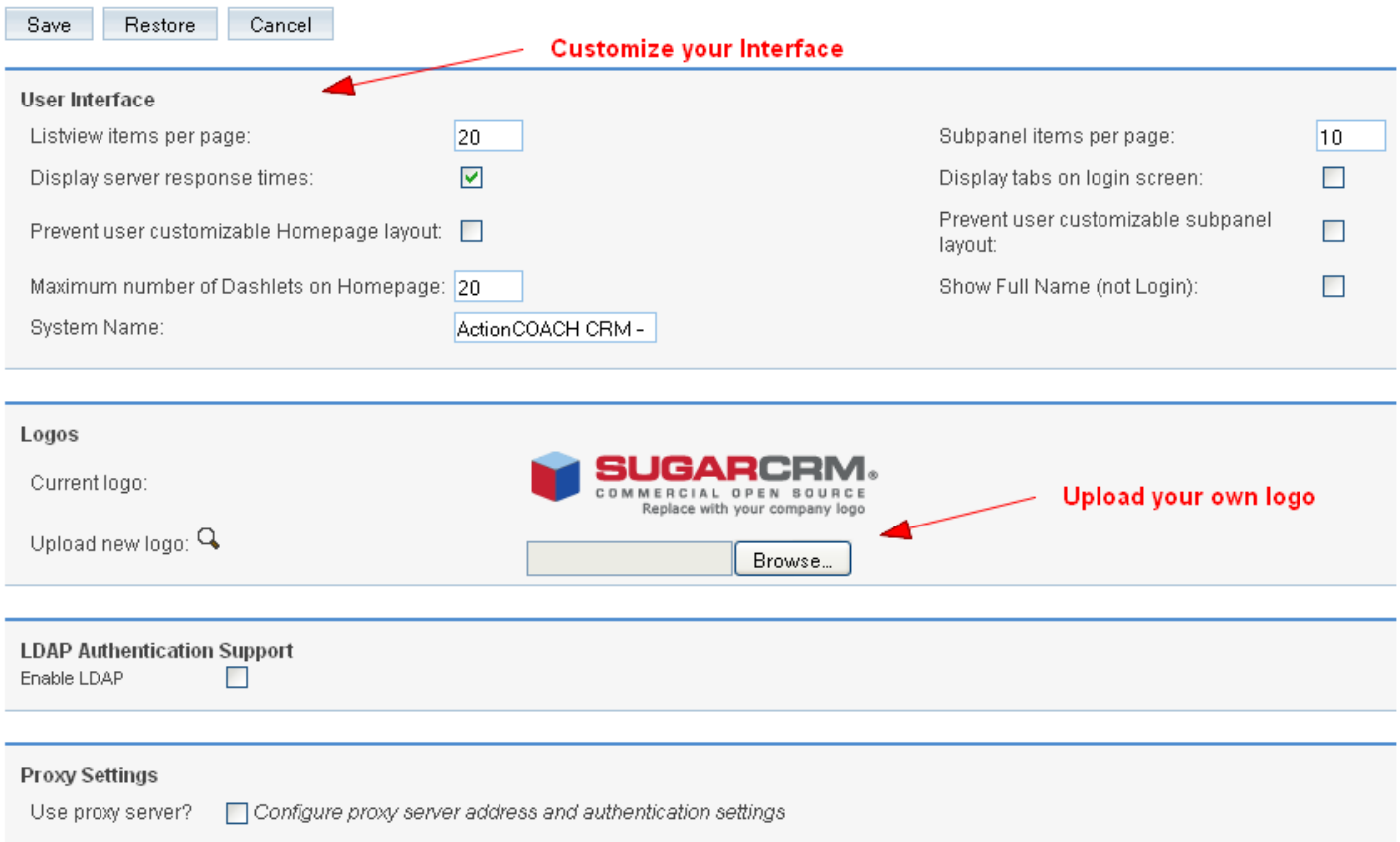
Upload new logo:

LDAP Authentication Support

Enable LDAP

Proxy Settings

Use proxy server? *Configure proxy server address and authentication settings*



1.2.2 User Management

The system allows 3 or more users under a particular account depending on the type of account.

Account Type	Number of users allowed
Coach	3
ML	10
Firm	10

- Take a quick view of all the users
- [Create New Users](#)
- Use [Search](#) options to look for existing users
- Click on column header to [sort](#) list
- [Export](#) selected users to a .csv file

Home Active Workflows Dashboard Calendar Activities Emails Workflow Manager Documents Leads >>

Last Viewed: Jerry Akers tele marketing Testing By Akk Kelly Dyer Mr. Sankalp attendee Test Campaign test list Testing

Shortcuts

- Create New User
- Users

Click on users

Basic Search Advanced Search

First Name Last Name Department Status --None--

Search Clear Saved Searches --None--

Users

Select Export Selected: 0 (1 - 8 of 8)

Name	User Name	Department	Email	Phone	Status	Administrator
Jerry Akers	Monica		marinaob@shaw.ca		Active	<input checked="" type="checkbox"/>
Administrator	demo				Active	<input checked="" type="checkbox"/>
Lisa Vega	LisaVega			678-395-7935	Active	<input type="checkbox"/>
Pankai Kumar	pankai@msn.com				Active	<input checked="" type="checkbox"/>

Click on coloumn header to sort

Click on an existing user to review their settings

- Make changes to existing user account by clicking [Edit](#)
- Click [Return to list](#) to move back to list of users
- Click [Change Password](#) to change the User password, an Admin has these rights.
- [Assign Roles](#) to a User

[Edit](#) [Change Password](#) [Duplicate](#)
Reset to Default: [User Preferences](#) [Homepage](#) [Dashboard](#)

[Return to List](#)
(5 of 8)

Full Name:	Nate Smith	User Name:	nathansmith
Status:	Active		

Edit any information or change password

Return to list of users

User Settings

Administrator:	<input type="checkbox"/>	Grants administrator privileges to this user
Group User:	<input type="checkbox"/>	Act as a group user. This user cannot login through the Sugar web interface. This user is only used for assigning items to a group via Inbound Email functionality.
Portal Only User:	<input type="checkbox"/>	Act as a portal user. This user cannot login through the Sugar web interface. This user is only used for portal web services. Normal users cannot be used for portal web services.
Notify on Assignment:	<input checked="" type="checkbox"/>	Receive an email notification when a record is assigned to you.
Show gridlines:	<input type="checkbox"/>	Controls gridlines on detail views

Roles

(1 - 1 of 1)

Name	Description
limited access	limited access edit rem

Select from a predefined list of Roles

Role defined for the selected user

Edit or remove the Role

1.2.3 Role Management

The Roles can be accessed from **Role Management** under Admin

Roles

- * set of permissions to perform actions such as viewing, editing and deleting records
- * allow control over user actions
- * can be assigned to multiple users and vice versa
- * System Administrator has rights that can not be restricted through role management

List of Roles:

Search

Search for a Role

Name

Search

Role

Select ▾ Delete

(1 - 6 of 6)

Name	Description
<input type="checkbox"/> Administrator	
<input type="checkbox"/> Coach	
<input type="checkbox"/> limited access	limited access
<input type="checkbox"/> Office Assistant	

Click on Role to view information

Roles: limited access

Edit Role to change name or description

Print ? Help

Edit Duplicate Delete

Name:	limited access
Description:	limited access

Double click on a cell to change value. Double click on a cell to change value

Save Cancel

	Access	Delete	Edit	Export	Import	List	View
Clients	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Bug Tracker	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Calls	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set

Double click on any cell to select from Enabled or Disabled. Default is Not Set.
Click **Save** after making the changes.

1.2.4 E-mail Settings

Use this option to set the default settings for outbound and inbound emails.

- specify From name and address for notification e-mails (your own)
- specify when a notification needs to be sent
- set defaults for Mail transfer agent and defaults for email
- choose to filter emails based on tags

Save Cancel **Name and address for notification emails** * Indicates required field

Email Notification Options

"From" Name: * Notifications on? *Sends notification emails when records are assigned.*

"From" Address: * Send notifications by default for new users? **Automated notification can be set**

Send notification from assigning user's e-mail address?

Save Outbound Raw Emails * Yes No

Mail Transfer Agent: **If SMTP is chosen then relevant details need to be filled**

User Email Defaults

Compose email messages in this format: **You can leave the settings as default or change them from the drop down**

Compose email using this client:

Compose email messages in this character set:

Delete related Notes & attachment files with deleted Emails:

Email Security Settings

Check the following that should NOT be allowed in via InboundEmail or displayed in the Emails module.

Preserve raw email source, including potentially harmful content. This option will only preserve raw messages in the database; it will not let unfiltered content through the SugarCRM UI. **This may lead to a compromise of your system.**

Toggle All Options **Check this option to strip inbound e-mails of all listed tags**

Select Outlook default minimum security precautions (errors on the side of correct display).

<input checked="" type="checkbox"/> <applet> Applet tag	<input checked="" type="checkbox"/> <base> Base tag
<input checked="" type="checkbox"/> <embed>Embed tag	<input checked="" type="checkbox"/> <form> Form tag
<input checked="" type="checkbox"/> <frame> Frame tag	<input checked="" type="checkbox"/> <frameset>Frameset tag
<input checked="" type="checkbox"/> <iframe> iFrame tag	<input checked="" type="checkbox"/> <import> Import tag
<input type="checkbox"/> <layer> Layer tag	<input checked="" type="checkbox"/> <link> Link tag
<input checked="" type="checkbox"/> <object> Object tag	<input type="checkbox"/> <style> Style tag

Individually select tags you want to strip

If SMTP settings are chosen:

Mail Transfer Agent: [Prefill Gmail Defaults](#) **Fill in the SMTP server**

SMTP Server: * **Auto filled**

SMTP Port: *

Use SMTP Authentication? Enable SMTP over SSL

Clicking the SMTP Authentication option will auto fill the fields with the SMTP username and Password.

You can also choose to use gmail settings once it is selected the fields auto fill.

Mail Transfer Agent:	SMTP <input type="button" value="▼"/> Prefill Gmail Defaults	Click to select gmail as mail account	
SMTP Server: *	<input type="text" value="smtp.gmail.com"/>	SMTP Port: *	<input type="text" value="465"/>
Use SMTP Authentication?	<input checked="" type="checkbox"/>	Enable SMTP over SSL	<input checked="" type="checkbox"/>
SMTP Username: *	<input type="text" value="admin"/>	SMTP Password: *	<input type="password" value="••••"/>

1.2.5 Inbound E-mail Settings:

You can set up the mail account to be handled for inbound e-mails. You will get the information of the e-mail Accounts already configured. Set up this mail account to be monitored for inbound mails.

Inbound Email: Home

[Print](#) [Help](#)

<input type="button" value="Save"/>	
Case Macro:	<input type="text" value="[CASE:%1]"/> Set the macro which will be parsed and used to link imported email to a Case. Set this to any value, but preserve the "%1".
Save Raw Source:	<input type="radio"/> Yes <input checked="" type="radio"/> No Select "Yes" if you would like to preserve the raw source for each imported email. Large attachments can cause failures with conservatively or incorrectly configured databases.
Number of Auto-responses:	<input type="text" value="10"/> Set the maximum number of auto-responses to send to a unique email address during a period of 24 hours.

Inbound Email

Select <input type="button" value="▼"/>	<input type="button" value="Delete"/>	Mail Accounts already configured			<input type="button" value="◀"/>	<input type="button" value="▶"/>	(1 - 2 of 2)	<input type="button" value="◀"/>	<input type="button" value="▶"/>
<input type="checkbox"/>	Name: <input type="text"/>	Group/Personal <input type="text"/>	Mail Account Usage <input type="text"/>	Mail Server: <input type="text"/>	Status: <input type="text"/>				
<input type="checkbox"/>	WSI	Personal	Create [Any]	mail.actioncoach.com	Active				<input type="button" value="✎"/>
<input type="checkbox"/>	wsitest	Group	Bounce Handling	mail.actioncoach.com	Active				<input type="button" value="✎"/>
Select <input type="button" value="▼"/>	<input type="button" value="Delete"/>				<input type="button" value="◀"/>	<input type="button" value="▶"/>	(1 - 2 of 2)	<input type="button" value="◀"/>	<input type="button" value="▶"/>

Click on the Mail account to view its settings.

- Enter the name of the Mail Account and the address of server
- Enter user name and password for the account
- Choose possible action for your mail box*
- You can choose an e-mail template for an automated reply from your account

- Enter the return name and address for bounced emails

*Possible Actions: Optionally, you can select an action that the team is permitted to perform. If you assigned a Group folder, you can select Create Case. You can select Bounce Handling to use the mail account for handling bounced emails from campaigns.

Inbound Email Setup: WSI

[? Help](#)

Save Cancel Test Settings * Indicates required field

Basic Setup

Name: * Status:

Mail Server Address: * User Name: *

Mail Server Protocol: * Password: *

Mail Server Port: *

Use SSL:

Annotations:

- Enter user name or an alt. name (points to Name field)
- Address of external mail server (points to Mail Server Address field)

Email Handling Options

Possible Actions: "From" Name: Default: wsitest

"From" Address: Default: wsitest@actioncoachcrm.com **Enter name and e-mail for bounced e-mails**

Auto-Reply Template: "Reply-to" Name:

No auto-reply to domain: **Select or create an auto reply mail**

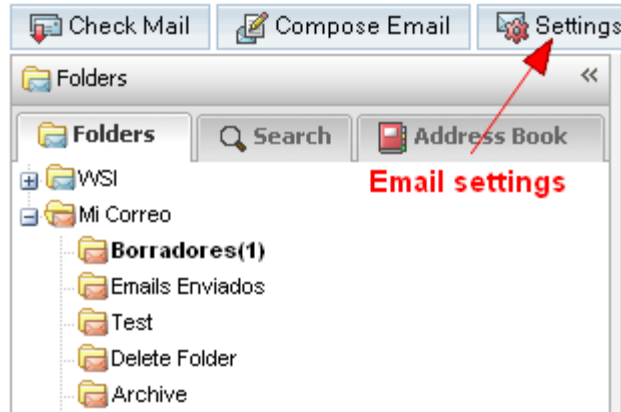
"Reply-to" Address:

*If you run campaigns and want to create an inbox to route bounced campaign emails, select Bounce Handling. You can create a bounce-handling inbox separately for each campaign or you can create one that is common to all campaigns

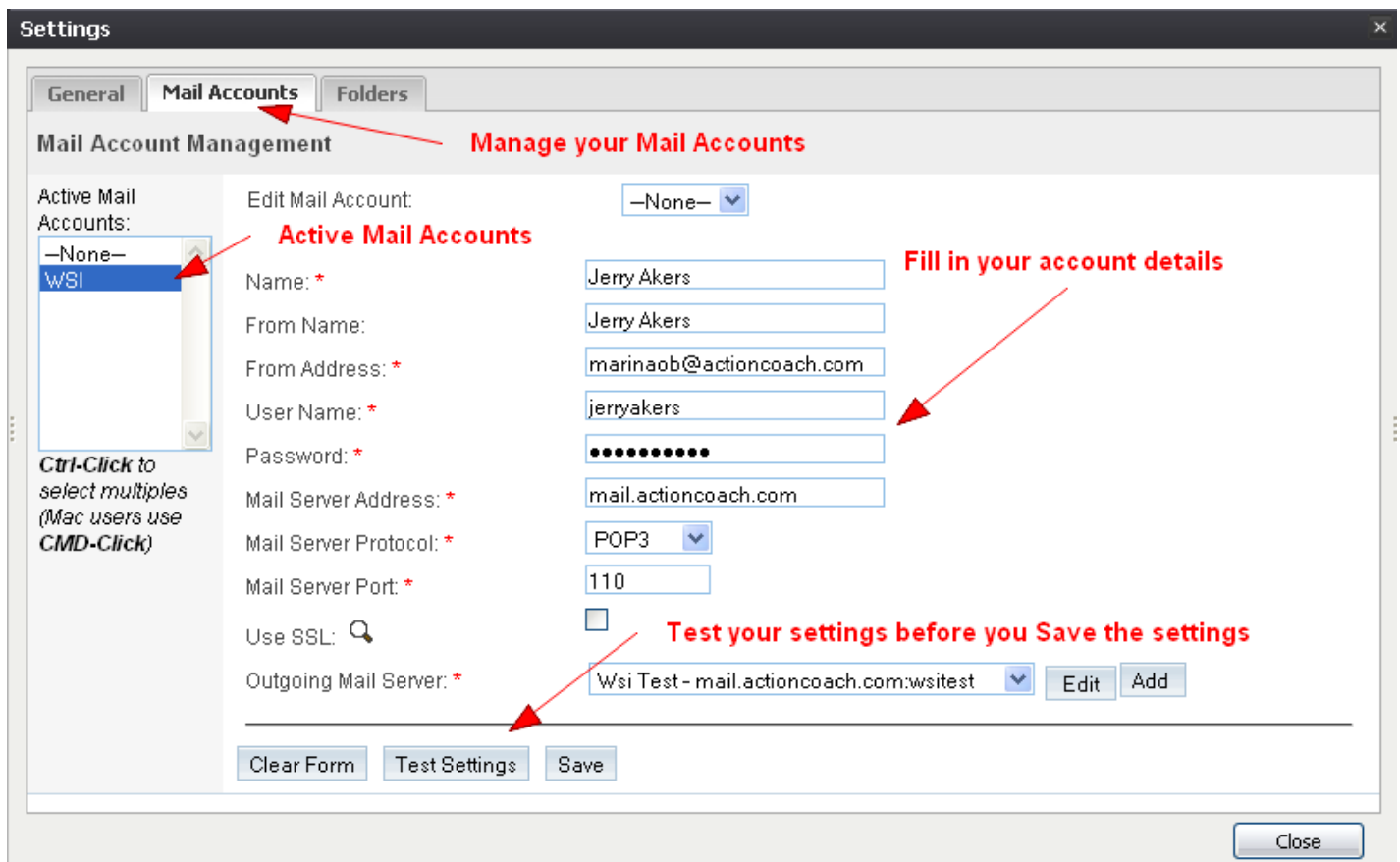
1.3 Email Module Settings

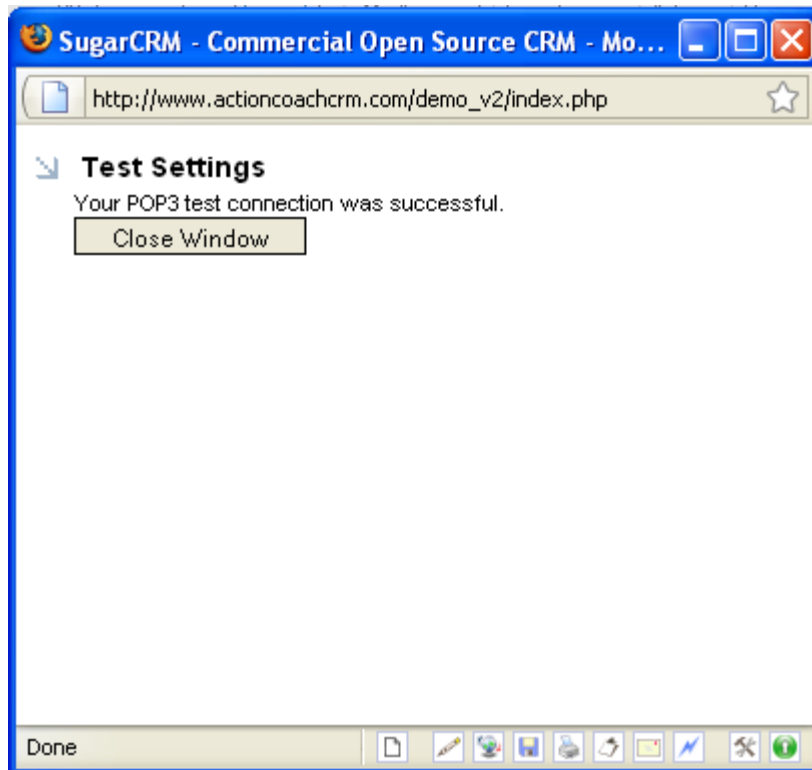
The email module allows you to manage your emails within the CRM provided the settings are chosen correctly.

- 1) Click on settings.



2) Click on Mail Account to manage the active account.





The above settings should have your account configured and you ready to explore the CRM and its modules.