POWER TO RUN YOUR BUSINESS

sage

CRM Mid-Market Edition

Sage CRM MME 5.7

Quick Start Guide

ACCPAC International, Inc.
Publisher

ACCPAC International, Inc.
End User License Agreement for an
Evaluation, Demonstration or Retail Edition of ACCPAC CRM™

IMPORTANT— READ CAREFULLY BEFORE YOU INSTALL OR USE THIS SOFTWARE: This End User License Agreement ("**EULA**") is a legal agreement between You ("**You**" and "**Your**" includes a person and/or an individual entity) and ACCPAC International, Inc. ("**ACCPAC**") concerning the specified evaluation, demonstration and/or retail edition of the ACCPAC CRM software product (hereinafter respectively referred to as "**Evaluation Product**," "**Demonstration Product**" and "**Retail Product**"; and collectively referred to as "**Software**"). The Software includes all component parts, the associated media, any printed materials, any updates, and any "online" or electronic documentation, as applicable. By accessing, installing, copying or otherwise using the Software, You agree to be bound by the terms of this EULA. If You do not agree to the terms of this EULA, ACCPAC is unwilling to license the Software to You. In such event, You may not access, use or copy the Software, and You should promptly contact ACCPAC for instructions on returning the Software. WRITTEN ASSENT IS NOT A PREREQUISITE TO THE VALIDITY OR ENFORCEABILITY OF THIS EULA.

---

1. License.

a. License Grant.

(i) Retail Product. If You licensed a Retail Product, subject to the payment of all applicable license fees, and the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable right to install and run one copy of the specified version of the Software and the accompanying documentation, solely for Your individual use. This EULA authorizes You to make one copy of the Retail Product solely for backup or archival purposes, provided that the copy You make contains all of the proprietary notices set forth in or on the original version of the Software.

(ii) Demonstration Product. If You licensed a Demonstration Product, subject to the payment of all applicable license fees, and the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable and revocable right to install and run copies of the Demonstration Product and the accompanying documentation, solely on computer(s) owned or controlled exclusively by You, for Your individual use and for demonstration, marketing, promotional, end user support, training and/or development purposes, each to the extent permitted and/or required under the applicable ACCPAC Solution Provider, Certified Consultant, Development Partner, Professional Accountant Recommender, Online Referral Partner, Hosting Partner, Recognized Training Center, Distribution Agreement or other applicable agreements between You and ACCPAC (collectively the "**Other ACCPAC Agreement**"). Use of the Demonstration Product is limited to not more than the number of concurrent users and/or seats as specified in the Other ACCPAC Agreement, multi-user license, product packaging or accompanying documentation. This EULA authorizes You to make one copy of the Demonstration Product solely for backup or archival purposes, provided that the copy You make contains all of the proprietary notices set forth in or on the original version of the Software. You may have additional rights as may be set forth in the applicable Other ACCPAC Agreement.

(iii) Evaluation Products. If You licensed an Evaluation Product, subject to the terms and conditions of this EULA, ACCPAC hereby grants to You a limited, non-sublicensable, non-exclusive, non-transferable and revocable right to install and run one copy of the Evaluation Product and the accompanying documentation, solely for Your individual use for evaluation purposes.

(iv) All Software. Upon receipt of the appropriate Software registration information, ACCPAC will provide You an alphanumeric key (the "**Activation Code**" or "**PAC Code**") to enable You to use the Software pursuant to the terms of this EULA. Documentation shall include, but not be limited to, any printed materials, "online" or electronic data provided by or obtained from ACCPAC with regard to this Software ("**Documentation**"). The Software and Documentation are licensed, not sold. Even though copies of the Software may be provided on media of different formats, copies of the Software on different media formats do not constitute multiple licenses to the Software. If the Software is licensed as a suite or bundle with more than one specified Software product, this EULA applies to all such specified Software products, subject to any restrictions or usage terms specified on the applicable product packaging or accompanying documentation that applies to any of such Software products individually.

b. Installation and Use. This Software is licensed for use on a single computer within a multi-user or networked environment where the Software installed on such computer (the "Server") may be made available for access by other computers, workstations, personal digital assistants, pagers, "smart phones," or such other electronic device for which the Software was designed ("Client Devices"). You may use and install only one copy of the Software on one Server and may not make access to the Software available to more than the number of specifically named users, utilizing the networked Client Devices, for which you have obtained a license; provided, however, with the ACCPAC CRM Web Self Service and ACCPAC CRM Wireless Self Service options You may make access to the Software available to an unlimited number of client, partner and anonymous users, utilizing the networked Client Devices, nevertheless, you may not make access to the Software available to more than the number of specifically named employee users, utilizing the networked Client Devices, for which you have obtained a license. The component parts of the Software may not be installed individually or jointly in full or in part on more than one Server. Except as provided herein, the Software may only be used by specifically named users, each operating a networked Client Device with an installed and separately licensed third-party browser. For purposes of this EULA, a "browser" is a software application installed on a computer networked to other computers or the Internet, and used to locate and display web pages, Internet sites, and other electronic materials stored at remote locations, e.g. Netscape Navigator or Microsoft Internet Explorer. Except as provided herein, use of software, hardware or services that bypass any Software license restrictions and/or permit non-licensed users to access or utilize the Software (e.g., "multiplexing," "pooling," or third party add on software or hardware) expressly does not reduce the number of licenses required (i.e., the required number of licenses would equal the number of named user inputs to the multiplexing or pooling software or hardware "front end"). If the number of users operating Client Devices that can potentially connect to the Software exceeds or has the potential to exceed the number of licenses You have obtained, then You must have a reasonable self-enforcing automatic mechanism in place to ensure that Your use of the Software does not exceed the use limits specified for the license You have obtained.

2. Term. Regardless of the location of the Software, You are responsible for strict compliance with any and all of the terms and conditions of this EULA. This EULA will terminate automatically if You fail to comply with any of the limitations or other requirements described herein, and such termination shall be in addition to and not in lieu of any criminal, civil or other remedies available to ACCPAC. When this EULA terminates, You must immediately cease using the Software and destroy all copies of the Software and the Documentation. You may terminate this EULA at any point by destroying all copies of the Software and the Documentation.

a. Retail Product. If You licensed a Retail Product, this EULA is effective unless and until You or ACCPAC terminates the EULA earlier, in accordance with the terms set forth herein.

b. Demonstration Product. If You licensed a Demonstration Product, this EULA is effective unless and until You or ACCPAC terminates the EULA earlier, in accordance with the terms set forth herein or the terms set forth in Your Other ACCPAC Agreement or upon the earlier termination or expiration of Your Other ACCPAC Agreement.

c. Evaluation Product. If You licensed an Evaluation Product, this EULA is effective for a period commencing on the earliest date this Evaluation Software is downloaded, installed or first run and thereafter continuing for the period specified in the product packaging or accompanying documentation, unless sooner terminated by You or ACCPAC in accordance with the terms set forth herein, but in no event shall such term exceed one hundred and eighty (180) days.

3. Updates. ACCPAC may, at its sole discretion, make bug fixes, updates and/or service packs available. ACCPAC's maintenance service, if applicable and offered, is available for Retail Product at an additional cost to You, as Licensee, under a separate written agreement. ACCPAC's maintenance service is not available for Evaluation Product.

4. Ownership Rights.

a. Ownership of Software. The Software and Documentation are protected by United States patent, copyright laws and other intellectual property laws, and international treaty provisions. ACCPAC and its third party licensors, if any, retain all title to and, except as expressly and unambiguously licensed herein, all rights and interest in (a) the Software, including, but not limited to, all copies, versions, customizations, compilations and derivative works thereof (by whomever produced) and all related Documentation; (b) the ACCPAC trademarks, service marks, trade names, icons and logos; (c) any and all copyright rights, patent rights, trade secret rights and other intellectual property and proprietary rights throughout the world in the foregoing; and (d) all Confidential Information (as defined in Section 14 below). You acknowledge that Your possession, installation, or use of the Software does not transfer to You any ownership, title, or registrable interest of any kind to the intellectual property in the Software, and that You will not acquire any rights to the Software except as expressly set forth in this EULA. You agree that all backup, archival, or any other type of copies of the Software and Documentation will contain the same proprietary notices that appear on and in the Software and Documentation.

b. Submissions. Should You decide to submit any materials to ACCPAC via electronic mail, through or to ACCPAC website(s), or otherwise, whether as feedback, data, questions, comments, ideas, concepts, techniques, suggestions or the like, You agree that such submissions are unrestricted and shall be deemed non-confidential upon submission. You grant to ACCPAC and its assigns a non-exclusive, royalty-free, worldwide, perpetual, irrevocable license, with the right to sublicense, to use, copy, transmit, distribute, create derivative works of, commercialize, display and perform such submissions.

5. Restrictions. You may not rent, lease, sublicense, loan, sell, distribute, market or commercialize any portion of the Software or its components. You may only install and use the Software on hardware which is (a) under Your exclusive control and (b) in the case of hardware performing any server functions, located at premises where You normally conduct day-to-day business operations. Notwithstanding the foregoing, if the Software is hosted under the auspices of an authorized ACCPAC Hosting Partner, it may be installed on server hardware located at premises under the exclusive or primary control of such Hosting Partner or its agent. You may not permit any parent, affiliate, subsidiary or any other third parties to benefit from the use or functionality of the Software, either directly or via a facility management, timesharing, service bureau or any other arrangement; provided, however, that You may use the Software, as provided herein, to process the data of an affiliate or subsidiary of which You own more than fifty percent (50%); provided, however, You may not exceed the number of datasets specified on the applicable product packaging or accompanying documentation. You may not use the Software as part of a facility management, timesharing, or service bureau arrangement. You may not transfer any or all of the rights granted to You under this EULA. To the maximum extent this restriction is permitted under applicable law, You may not rename files of, modify, translate, localize, decompile, disassemble, decrypt, reverse engineer, attempt to derive source code from, remove any proprietary notices from, or create derivative works based upon the Software, in whole or in part. You may not duplicate or copy any portion of the Software or Documentation, unless otherwise set forth herein. You may not remove any proprietary notices or labels on the Software, including, but not limited to, the ACCPAC and product names wherever they may appear. All rights not expressly set forth hereunder are reserved by ACCPAC. ACCPAC reserves the right to periodically conduct audits upon advance written notice to verify compliance with the terms of this EULA.

6. Warranty and Disclaimer.

a. Limited Warranty. ACCPAC warrants that for ninety (90) days from the date of original purchase the media on which the Software is contained will be free from defects in materials and workmanship.

b. Customer Remedies. ACCPAC's entire liability and Your exclusive remedy shall be replacement of the defective media. To receive replacement of defective media, You must receive a return authorization number from ACCPAC and return the defective media to ACCPAC at Your expense with a copy of Your receipt. This limited warranty is void if the defect has resulted from accident, abuse, or misapplication. Any replacement media will be warranted for the remainder of the original warranty period. This remedy is not available to the extent it is prohibited under United States export control laws and regulations.

c. Warranty Disclaimer. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, AND EXCEPT FOR THE LIMITED WARRANTY SET FORTH HEREIN, THE SOFTWARE (AND ACCOMPANYING DOCUMENTATION) IS PROVIDED ON AN "AS IS" BASIS WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED. WITHOUT LIMITING THE FOREGOING PROVISIONS, YOU ASSUME SOLE RESPONSIBILITY FOR SELECTING THE SOFTWARE TO ACHIEVE YOUR INTENDED RESULTS, AND SOLE RESPONSIBILITY FOR THE INSTALLATION OF, USE OF, AND RESULTS OBTAINED FROM THE SOFTWARE. WITHOUT LIMITING THE FOREGOING PROVISIONS, ACCPAC MAKES NO WARRANTY THAT THE SOFTWARE WILL BE ERROR-FREE, VIRUS FREE, OR FREE FROM INTERRUPTIONS OR OTHER FAILURES OR THAT THE SOFTWARE WILL SATISFY YOUR SPECIFIC REQUIREMENTS. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, ACCPAC DISCLAIMS ALL WARRANTIES AND CONDITIONS, EITHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING BUT NOT LIMITED TO ANY (IF ANY) IMPLIED WARRANTIES OR CONDITIONS OF MERCHANTABILITY, OF FITNESS FOR A PARTICULAR PURPOSE, OF LACK OF VIRUSES, OF LACK OF ACCURACY OR COMPLETENESS OF RESPONSES, OF RESULTS, AND LACK OF NEGLIGENCE OR LACK OF WORKMANLIKE EFFORT, ALL WITH REGARD TO THE SOFTWARE AND ASSOCIATED DOCUMENTATION. THERE IS NO WARRANTY OR CONDITION OF TITLE, QUIET ENJOYMENT, QUIET POSSESSION, CORRESPONDENCE TO DESCRIPTION, OR NON-INFRINGEMENT WITH REGARD TO THE SOFTWARE. THE ENTIRE RISK OF THE QUALITY OF OR ARISING OUT OF USE OR PERFORMANCE OF THE SOFTWARE, IF ANY, REMAINS SOLELY WITH YOU. SOME STATES AND JURISDICTIONS DO NOT ALLOW LIMITATIONS ON IMPLIED WARRANTIES, SO THE ABOVE LIMITATION MAY NOT APPLY TO YOU. THE FOREGOING PROVISIONS SHALL BE ENFORCEABLE TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

d. Indemnification. You agree to defend, indemnify and hold harmless ACCPAC and its directors, officers, employees, affiliates, sublicensees, and agents from and against all claims, defense costs (including reasonable expert and attorneys' fees), judgments and other expenses arising out of or on account of any negligent act, omission, or willful misconduct by You or on Your behalf in (i) the installation or use of the Software or (ii) your compliance or failure to comply with this EULA.

e. Data. YOU ACKNOWLEDGE THAT ANY DATA ENTRY, CONVERSION OR STORAGE IS SUBJECT TO THE LIKELIHOOD OF HUMAN AND MACHINE ERRORS, MALICIOUS MANIPULATION, OMISSIONS, DELAYS, AND LOSSES, INCLUDING, BUT NOT LIMITED TO, INADVERTENT LOSS OF DATA OR DAMAGE TO MEDIA THAT MAY RESULT IN LOSS OR DAMAGE TO YOU AND/OR YOUR PROPERTY, AND/OR YOUR DETRIMENTAL

RELIANCE ON MALICIOUSLY MANIPULATED DATA. ACCPAC SHALL NOT BE LIABLE FOR ANY SUCH ERRORS, OMISSIONS, DELAYS, OR LOSSES. YOU ARE RESPONSIBLE FOR ADOPTING REASONABLE MEASURES TO LIMIT THE IMPACT OF SUCH PROBLEMS, INCLUDING BACKING UP DATA, ADOPTING PROCEDURES TO ENSURE THE ACCURACY OF INPUT DATA, EXAMINING AND CONFIRMING RESULTS PRIOR TO USE, ADOPTING PROCEDURES TO IDENTIFY AND CORRECT ERRORS AND OMISSIONS, REPLACING LOST OR DAMAGED MEDIA, AND RECONSTRUCTING DATA. YOU ARE ALSO RESPONSIBLE FOR COMPLYING WITH ALL LOCAL, STATE, AND FEDERAL LAWS PERTAINING TO THE USE AND DISCLOSURE OF ANY DATA. IF YOU LICENSED AN EVALUATION PRODUCT, YOU ACKNOWLEDGE AND UNDERSTAND (I) THAT THE EVALUATION PRODUCT MAY BE USED FOR EVALUATION PURPOSES ONLY, (II) THAT THE EVALUATION PRODUCT SHALL BE OPERABLE ONLY FOR A LIMITED TIME AND (III) THAT, UPON EXPIRATION OF THE EVALUATION PERIOD, ANY DATA OR OTHER INFORMATION USED WITH, PROCESSED BY AND/OR STORED IN CONJUNCTION WITH THE EVALUATION PRODUCT MAY BE IRRETRIEVABLE, UNRECOVERABLE AND/OR OTHERWISE UNUSABLE.

f. Authorized ACCPAC Solution Providers and Certified Consultants. ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT IS NOT AFFILIATED WITH ACCPAC IN ANY CAPACITY OTHER THAN AS A RESELLER, INSTALLER OR CONSULTANT OF ACCPAC'S PRODUCTS AND HAS NO AUTHORITY TO BIND ACCPAC OR MODIFY ANY LICENSE OR WARRANTY. ACCPAC MAKES NO REPRESENTATIONS, WARRANTY, ENDORSEMENT OR GUARANTEE WITH RESPECT TO THE SKILLS OR QUALIFICATIONS OF ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT AND YOU ARE ENCOURAGED TO INDEPENDENTLY INVESTIGATE THE SKILLS AND QUALIFICATIONS OF ANY AUTHORIZED ACCPAC SOLUTION PROVIDER, CERTIFIED CONSULTANT, RESELLER, INSTALLER OR CONSULTANT WITH WHOM YOU ASSOCIATE.

7. Limitation of Liability. UNDER NO CIRCUMSTANCES AND UNDER NO LEGAL THEORY, WHETHER IN TORT, CONTRACT, OR OTHERWISE, SHALL ACCPAC BE LIABLE TO YOU OR TO ANY OTHER PERSON OR ENTITY FOR ANY INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES OF ANY CHARACTER WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, LOSS OF GOODWILL, LOSS OF CONFIDENTIAL OR OTHER INFORMATION, FOR BUSINESS INTERRUPTION, WORK STOPPAGE, COMPUTER FAILURE OR MALFUNCTION, FOR PERSONAL INJURY, LOSS OF PRIVACY, FOR FAILURE TO MEET ANY DUTY INCLUDING A DUTY OF GOOD FAITH OR OF REASONABLE CARE, FOR NEGLIGENCE (WHETHER ACTIVE OR PASSIVE), AND FOR ANY OTHER PECUNIARY OR OTHER LOSS WHATSOEVER) ARISING OUT OF OR IN ANY WAY RELATED TO THE USE OR INABILITY TO USE THE SOFTWARE, OR OTHERWISE UNDER OR IN CONNECTION WITH ANY PROVISION OF THIS EULA, EVEN IN THE EVENT OF FAULT, TORT (INCLUDING NEGLIGENCE, AND GROSS NEGLIGENCE), STRICT LIABILITY, BREACH OF CONTRACT, OR BREACH OF WARRANTY BY ACCPAC, AND EVEN IF ACCPAC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT WILL ACCPAC BE LIABLE FOR ANY DAMAGES IN EXCESS OF THE LIST PRICE ACCPAC CHARGES FOR A LICENSE TO THE SOFTWARE. THIS LIMITATION OF LIABILITY SHALL NOT APPLY TO LIABILITY FOR DEATH OR PERSONAL INJURY TO THE EXTENT THAT APPLICABLE LAW PROHIBITS SUCH LIMITATION. FURTHERMORE, SOME STATES AND JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF INCIDENTAL OR CONSEQUENTIAL DAMAGES, SO THIS LIMITATION AND EXCLUSION MAY NOT APPLY TO YOU. THE FOREGOING PROVISIONS SHALL BE ENFORCEABLE TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

8. Entire Agreement. This EULA expressly supersedes and completely replaces any and all prior end user license agreements. ACCPAC shall not be bound by or liable to You for any pre-existing or contemporaneous written or oral representations or warranties, made by anyone, with respect to the Software Product, including any authorized Solution Provider, Certified Consultant, distributor or reseller or their respective agents, employees, or representatives, nor shall You be deemed a third party beneficiary of any obligations of ACCPAC to any such Solution Provider, Certified Consultant, distributor or reseller.

9. Attorneys' Fees. If any party employs attorneys to enforce any rights arising out of or relating to this EULA, the prevailing party shall be entitled to recover its reasonable attorneys' fees, costs, and other expenses.

10. Severability. If any provision of this EULA is held to be unenforceable, the enforceability of the remaining provisions shall in no way be affected or impaired thereby.

11. United States Government. The Software and accompanying Documentation are deemed to be "commercial computer software" and "commercial computer software documentation," respectively, pursuant to DFAR Section 227.7202 and FAR Section 12.212, as applicable. Any use, modification, reproduction, release, performance, display or disclosure of the Software and accompanying Documentation by the United States Government shall be governed solely by the terms of this EULA and shall be prohibited except to the extent expressly permitted by the terms of this EULA.

12. Export Controls. You acknowledge that the Software may be subject to export controls imposed by U.S. laws and regulations. During the term of this EULA, You agree to comply with the U.S. Foreign Corrupt Practices Act and with all export laws and restrictions and regulations of the United States Department of Commerce or other United States or foreign agency or authority, and not to knowingly export, re-export, download, or allow the export, re-export or downloading of the Software or Documentation and any underlying information or technology in violation of any such restrictions, laws or regulations, to Afghanistan, Cuba, Iran, Iraq, Libya, North Korea or to any Group D:1 or E:2 country (or to any national of such countries), specified in the then current Supplement No. 1 to Part 740, or in violation of the embargo provisions in Part 746 of the U.S. Export Administration Regulations (or any successor regulations or supplement), except in compliance with all licenses and approvals required under applicable export laws and regulations, including, without limitation, those of the United States Department of Commerce. By accessing, installing, downloading or using the Software You are agreeing to the foregoing and You are certifying that You are not located in, under the control of, or a national or resident of any such country or on any such list.

EXPORT OF THE SOFTWARE MAY BE SUBJECT TO COMPLIANCE WITH THE RULES AND REGULATIONS PROMULGATED FROM TIME TO TIME BY THE BUREAU OF EXPORT ADMINISTRATION, UNITED STATES DEPARTMENT OF COMMERCE, WHICH RESTRICT THE EXPORT AND RE-EXPORT OF CERTAIN PRODUCTS AND TECHNICAL DATA. YOU ACKNOWLEDGE AND AGREE THAT IF THE EXPORT OF THE SOFTWARE IS CONTROLLED UNDER SUCH RULES AND REGULATIONS, THEN YOU SHALL NOT CAUSE THE SOFTWARE TO BE EXPORTED OR RE-EXPORTED, DIRECTLY OR INDIRECTLY, (A) WITHOUT ALL EXPORT OR RE-EXPORT LICENSES AND UNITED STATES OR OTHER GOVERNMENTAL APPROVALS REQUIRED BY ANY APPLICABLE LAWS, OR (B) IN VIOLATION OF ANY APPLICABLE PROHIBITION AGAINST THE EXPORT OR RE-EXPORT OF ANY PART OF THE SOFTWARE. SOME COUNTRIES HAVE RESTRICTIONS ON THE USE OF ENCRYPTION WITHIN THEIR BORDERS, OR THE IMPORT OR EXPORT OF ENCRYPTION EVEN IF FOR ONLY TEMPORARY PERSONAL OR BUSINESS USE. YOU ACKNOWLEDGE THAT THE IMPLEMENTATION AND ENFORCEMENT OF THESE LAWS IS NOT ALWAYS CONSISTENT AS TO SPECIFIC COUNTRIES. YOU ACKNOWLEDGE THAT IT IS YOUR ULTIMATE RESPONSIBILITY TO COMPLY WITH ANY AND ALL GOVERNMENT EXPORT AND OTHER APPLICABLE LAWS AND THAT ACCPAC HAS NO FURTHER RESPONSIBILITY AFTER THE INITIAL LICENSE TO YOU WITHIN THE ORIGINAL COUNTRY OF LICENSE.

13. High Risk Activities. The Software is not fault-tolerant and is not designed or intended for use in hazardous environments requiring fail-safe performance, including without limitation, in the operation of nuclear facilities, aircraft navigation or communication systems, air traffic control, weapons systems, direct life-support machines, or any other application in which the failure of the Software could lead directly to death, personal injury, or severe physical or property damage (collectively, "High Risk Activities"). ACCPAC expressly disclaims any express or implied warranty of fitness for High Risk Activities.

14. Confidentiality. You agree that the Software, including, but not limited to, all source and object code components, screen shots and displays, graphical user interfaces, algorithms, formulae, data structures, scripts, application programming interfaces and protocols, and the Documentation (collectively the "**Confidential Information**") are trade secrets of ACCPAC and are owned by ACCPAC or, where applicable, its third-party licensors. You agree to retain all Confidential Information in strict confidence at least with the same amount of diligence that You exercise in preserving the secrecy of Your most-valuable information, but in no event less than reasonable diligence. You agree to: (i) only disclose Confidential Information to Your employees and agents to the extent required to use the Software under the terms of this EULA and not to disclose or disseminate the Confidential Information to any third party without the prior written consent of ACCPAC, (ii) use the Confidential Information solely for Your benefit as provided for herein and not to allow any third party to benefit from the Confidential Information, and (iii) bind Your employees and agents, by terms no less restrictive than those set forth herein, to maintain the confidentiality of such Confidential Information, and not use or disclose such information except as permitted under this EULA. Notwithstanding the disclosure of any Confidential Information for any reason, such Confidential Information shall continue to be owned by ACCPAC or its licensors. Nothing contained herein shall be deemed to prevent You from disclosing or disseminating Your data, in any format or any report, to whomever You so choose. Notwithstanding anything else to the contrary in this Section 14, and only with respect to Demonstration Product, You are permitted to use the Demonstration Product to demonstrate and promote the functionality and benefits of the Product.

15. Miscellaneous. This EULA is exclusively governed by the laws of the United States and the State of California, without reference to conflicts of law principles. In the event of a dispute or legal action between the parties, they agree to waive any objections to personal jurisdiction, and agree to service of process and exclusive venue in the Federal District Court for Northern California or the California Superior Court of Alameda County. The application of the United Nations Convention of Contracts for the International Sale of Goods is expressly excluded. This EULA sets forth all of Your rights and is the entire agreement between the parties. This EULA supersedes any other communications with respect to the Software and/or Documentation. This EULA may not be modified except by a written addendum issued by a duly authorized representative of ACCPAC. No provision hereof shall be deemed waived unless such waiver shall be in writing and signed by a duly authorized representative of ACCPAC. You hereby acknowledge a breach of this EULA would cause irreparable harm and significant injury to ACCPAC that may be difficult to ascertain and that a remedy at law would be inadequate. You agree that ACCPAC shall have the right to seek and obtain immediate injunctive relief to enforce the obligations under this EULA in addition to any other rights and remedies it may have. If any provision of this EULA is held invalid, the remainder of this EULA shall continue in full force and effect. The controlling language of this EULA is English. If You have received a translation into another language, it has been provided for Your convenience only.

16. Apache Software License, Version 1.1.

Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

a. Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer.

b. Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.

c. The end-user documentation included with the redistribution, if any, must include the following acknowledgment: "This product includes software developed by the Apache Software Foundation (http://www.apache.org/)." Alternately, this acknowledgment may appear in the software itself, if and wherever such third-party acknowledgments normally appear.

d. The names "FOP" and "Apache Software Foundation" must not be used to endorse or promote products derived from this software without prior written permission. For written permission, please contact apache@apache.org.

e. Products derived from this software may not be called "Apache", nor may "Apache" appear in their name, without prior written permission of the Apache Software Foundation.

THIS SOFTWARE IS PROVIDED ``AS IS'' AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLU- DING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

This software consists of voluntary contributions made by many individuals on behalf of the Apache Software Foundation and was originally created by James Tauber <jtauber@jtauber.com>. For more information on the Apache Software Foundation, please see http://www.apache.org/.

17. ACCPAC Customer Contact. If You have any questions concerning these terms and conditions, or if You would like to contact ACCPAC for any other reason, please call (925) 461-2625, or write to us at: ACCPAC International, Inc., 6700 Koll Center Parkway, Third Floor, Pleasanton, California 94566, USA. You may also find us on the Web at http://www.accpac.com or http://www.accpaconline.com.

ACCPAC® SUPPORTPLUS™
TERMS AND CONDITIONS OF SALE

1. General. These terms and conditions (the "Terms and Conditions"), the invoice, statement, or notice ("Invoice"), and the end user license agreement (the "EULA") for the Software, as defined below, constitute the entire agreement (the "Agreement") between the ACCPAC entity identified in the Invoice ("ACCPAC," "we," "us," or "our") and the buyer identified in the "Bill To" section of the Invoice ("you" or "your") regarding your purchase of SupportPlus. The "Software" refers the to ACCPAC software product(s) for which you have purchased SupportPlus. This Agreement supersedes all prior and contemporaneous agreements and may be amended only by a writing signed by ACCPAC.

2. SupportPlus Plans and À La Carte Options. Subject to your payment of all applicable fees set forth in the Invoice (the "Fees"), you will receive the SupportPlus Plan (Software Assurance, Standard or Premier) or à La Carte option (Tech-Support OnDemand or Payroll Update Plan) you purchased. The upgrades, service packs, payroll tax updates, technical telephone support, and/or other benefits included with the SupportPlus Plan or à La Carte option you purchased are set forth at www.accpac.com/supportplus (the "SupportPlus Website"). The SupportPlus Plans and à La Carte options may be amended or modified from time to time by ACCPAC, within its sole discretion, upon thirty (30) days notice via posting at the SupportPlus Website or other written notice given by ACCPAC. Certain SupportPlus Plans and à La Carte options may not be available in some countries.

3. Current Version; Media. To use or install any upgrades, service packs, payroll tax updates, or any other documentation data or materials available under SupportPlus ("Materials"), you must have a valid license for the then-current version of the Software; installing the Materials with older versions of the Software may cause the Materials and/or the Software to function improperly and/or the Software to cease functioning. The Materials, including but not limited to upgrades, service packs, and payroll tax updates, shall be released as determined appropriate by ACCPAC, in its sole discretion, and may be provided via CD, diskette, Internet, your Solution Provider and/or other delivery method at ACCPAC's sole discretion. If available on CD or diskette, ACCPAC will deliver the Materials to you (i) FOB origin; and (ii) after advance payment of an annual shipping and handling charge for all regular shipments to you under this Agreement during the applicable Initial or Renewal Term, as defined in section 6.

4. Pricing, Payment, and Acceptance. All fees are nontransferable and non-refundable (even in the event you cancel your SupportPlus coverage). You agree to pay all Fees set forth in the Invoice in the currency specified therein within 30 days of the date of the Invoice. ACCPAC may raise the Fees for any renewal term upon 30 days prior notice. A $50.00 (U.S.) charge will be added to the amount of any dishonored check, charge, debit or transfer. You agree to pay all Fees, plus any applicable late fees or penalties, if any check, charge, debit or transfer is not honored by your financial institution for any reason. Unless you notify us in writing within 10 days of the date on your Invoice of any discrepancy between the Materials you ordered and those you received, you are deemed to have accepted delivery. By installing, using or accepting delivery of the Materials, you agree to be bound by the EULAs and this Agreement. Unless otherwise indicated in the Invoice, all amounts set forth therein are exclusive of taxes, insurance, and shipping and handling charges and you are responsible for payment thereof.

5. Lapse. To resume your subscription to any SupportPlus Plan (Software Assurance, Standard or Premier) after a lapse, you must purchase a minimum of one (1) full year of service and pay a reinstatement fee of twenty percent (20%) of the then-current Fee for each month of lapsed coverage.

6. Term and Termination. Subject to your payment of all Fees, the term of the Agreement starts on the date indicated in the Invoice and shall continue in effect for a one-year period or such other period expressly set forth in the Invoice ("Initial Term"). Subject to your payment of the renewal and other Fees, this Agreement shall renew for successive one-year terms or such other period as expressly set forth in the Invoice (each a "Renewal Term"). The Agreement shall terminate upon (a) your failure to timely pay any renewal or other Fees, as specifically set forth in any Invoice; (b) your delivery of a written notice of termination to ACCPAC, provided that you are not in breach of any terms of the Agreement; or (c) your breach of the Agreement and failure to cure such breach within 30 days after written notice thereof by ACCPAC, provided that ACCPAC hereby reserves all rights and remedies available to it as a result of such breach. Upon expiration or termination of the Agreement for any reason, you acknowledge and agree that (i) you shall not be entitled to a refund or offset of any amounts owed or paid to ACCPAC; and (ii) you must cease using the Materials and any copies thereof, remove the Materials and any copies thereof from all computers and other devices in your control, and destroy all media in your control containing the Materials or copies thereof. Unless otherwise provided herein, remedies are cumulative and there is no obligation to exercise a particular remedy. Expiration or termination of the Agreement shall not prejudice, limit, or restrict any other rights or remedies either party may have arising prior to such expiration or termination. ACCPAC has no obligation to refund any amounts paid by you.

7. Additional Services. Technical support services, other than Tech-Support OnDemand, may be provided by ACCPAC, subject to a separate written agreement between the parties. Fees for such technical support services shall be at ACCPAC's then-current published rates, plus any costs and expenses, including reasonable transportation and lodging. Availability of and Fees for international technical support services shall be determined by ACCPAC, in its sole discretion.

8. Audits. ACCPAC or its agents may audit your books, records and information systems to ensure that your use of the Product complies with the end user license agreement between you and ACCPAC concerning the Product (the "EULA").

9. Client ID. You must maintain the security of your Client ID number, and you may not allow anyone other than your employees or employees of your authorized ACCPAC

Solution Provider of record to use your Client ID number. You may change your Solution Provider of record by completing the appropriate form provided by ACCPAC.

10. Limitations. ACCPAC has no obligation to support: (a) altered, damaged, or modified Software, (b) problems, issues, or errors caused by negligence, abuse, or misapplication of the Software; (c) use of the Software other than as specified in the ACCPAC documentation; or (d) hardware malfunctions, third-party software not licensed from ACCPAC, or Software which is not the then-current version. At ACCPAC's request and your own expense, you will provide ACCPAC with documentation of problems and test data, and cooperate with ACCPAC to resolve the issue(s) submitted by you. ACCPAC shall provide SupportPlus in the English language, except as otherwise agreed in writing.

11. DISCLAIMER OF WARRANTIES. THE PRODUCT, UPGRADES AND MATERIALS RELATED THERETO ARE SUBJECT EXCLUSIVELY TO THE WARRANTIES SET FORTH IN THE EULA. NO OTHER WARRANTIES ARE MADE BY ACCPAC WITH RESPECT TO THE MATERIALS. SERVICES PROVIDED PURSUANT TO THE AGREEMENT ARE NOT WARRANTED. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, ACCPAC PROVIDES THE MATERIALS AND SERVICES "AS IS" AND "AS AVAILABLE" AND THE ENTIRE RISK AS TO SATISFACTORY QUALITY, PERFORMANCE, ACCURACY AND EFFORT IS WITH YOU. EXCEPT AS PROVIDED IN THE LIMITED WARRANTY, IF ANY, ACCPAC HEREBY DISCLAIMS ALL WARRANTIES, CONDITIONS, OR DUTIES OF EVERY NATURE WHATSOEVER (EXCEPT ANY DUTIES OF GOOD FAITH). FURTHER, THERE IS NO WARRANTY OF TITLE, ENJOYMENT, OR LACK OF INFRINGEMENT, OR THAT THE PROVISION OR OPERATION OF ANY MATERIALS WILL BE TIMELY OR UNINTERRUPTED.

12. Limitation of Liability and Exclusion of Damages. NOTWITHSTANDING ANY DAMAGES YOU MAY INCUR FOR ANY REASON WHATSOEVER, ACCPAC'S ENTIRE LIABILITY FOR ANY BREACH OF THE AGREEMENT OR FOR ANY CAUSE OF ACTION OF ANY NATURE (INCLUDING WITHOUT LIMITATION, TORT OR PRODUCT LIABILITY), OR UNDER THE LIMITED WARRANTY, AND YOUR EXCLUSIVE REMEDY AGAINST ACCPAC SHALL BE LIMITED TO THE AMOUNT OF DAMAGES ACTUALLY INCURRED BY YOU, UP TO AN AMOUNT NOT TO EXCEED THE FEES PAID TO ACCPAC FOR THE PRECEDING 12-MONTH PERIOD. PROVISIONS SET FORTH IN SECTIONS 10, 11, AND 12 SHALL APPLY TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, EVEN IF ANY REMEDY FAILS OF ITS ESSNTIAL PURPOSE. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL ACCPAC BE LIABLE FOR ANY SPECIAL, INCIDENTAL, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INDIRECT DAMAGES OR LOSSES WHATSOEVER, ARISING OUT OF OR IN ANY WAY RELATED TO THE ACCPAC MATERIALS, EVEN IF ACCPAC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, AND EVEN IN THE EVENT OF FAULT, TORT (INCLUDING NEGLIGENCE) OR STRICT OR PRODUCT LIABILITY OR MISREPRESENTATION.

13. Miscellaneous. To the extent permitted by local law, this Agreement shall be governed by and construed exclusively in accordance with the laws of California without regard to the conflict of laws provisions thereof and without regard to the United Nations Convention on Contracts for the International Sale of Goods. In any action or proceeding to enforce rights under the Agreement, the prevailing party shall be entitled to recover costs and attorneys' fees.

Contents

Chapter 1: Getting Started

Chapter 2: Marketing

Chapter 3: Sales

Chapter 4: Customer Care

Chapter 5: Administration

Chapter 1
Getting Started

Introduction

This guide gives you a quick start to core Sage CRM MME functionality – Basic skills, Sales, Marketing, Customer Care, and Administration.

It does not cover CRM Options, such as CTI or back office integration with other products. These are covered in separate guides.

Basic Sage CRM MME

With the functionality of basic Sage CRM MME you can:

- Browse Customer Information
- Manage Your Time
- Track All Customer Interactions

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

For this chapter, you can log onto CRM with any of the following users:

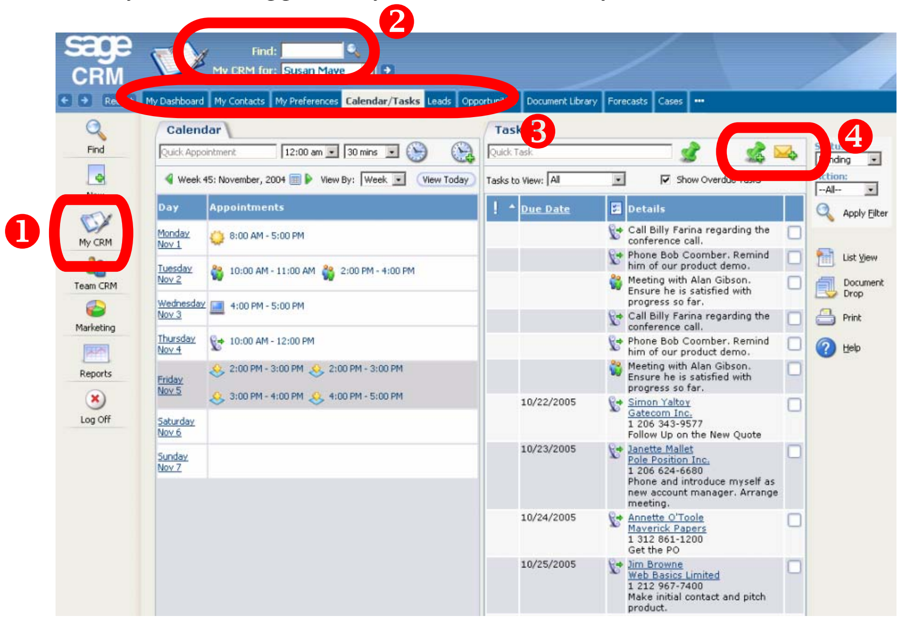
Name	Logon ID	Profile
Dave Montana	montanad	Marketing Manager
Susan Maye	mayes	Sales
Kylie Ward	wardk	Customer Care Manager
Administrator	Admin	System Administrator

None of these users require passwords.

Each of the following chapters takes you through a brief snapshot of key tasks these types of users perform.

Where's my stuff?

When you have logged on, you arrive in the My CRM work area.



❶ Click on My CRM to get to your personal work area.

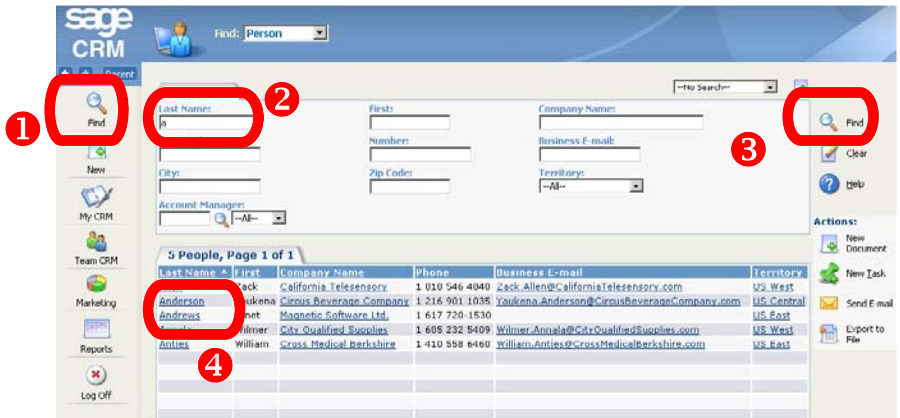
❷ You can see whose work area it is from the name at the top of the screen.

❸ Click on the different tabs to see what current appointments, opportunities, and personal settings you have.

❹ Use the buttons at the top of the Calendar/Tasks tab to get busy and start filling up your diary.

Where’s the rest of the stuff?

There’s plenty of sample data in this trial system, so go ahead, be nosy!



❶ Right-click on the Find menu button, and select the type of search from the Pop Out list. For example, Person.

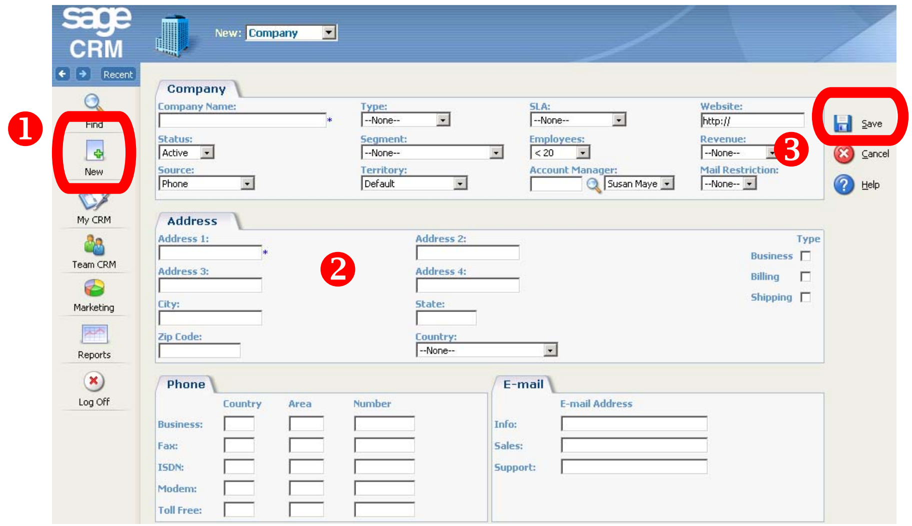
❷ Type in one or more search criteria if you want to—or leave these fields blank to see all the customer information.

❸ Click on the Find action button to start the search.

❹ Click on any one of the hyperlinks to drill down on the customer information.

How do I add my own real customer?

Have you got a real or imaginary business card there? Well go ahead, add it in!



❶ Right-click on the New menu button, and select Company from the Pop Out list.

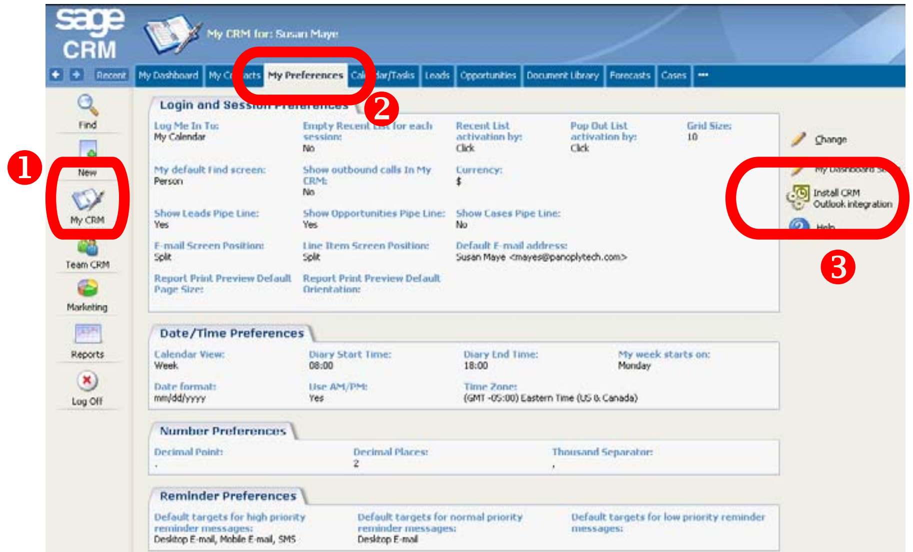
You'll go through an initial "deduplication" screen—just type in the company name and click on the Enter Company Details button to proceed.

❷ Then go ahead and add in the company, address, and main contact details.

❸ Click on the Save button to add all the details into CRM.

How can I synchronize data with MS Outlook?

All you have to do is download the MS Outlook Plugin. Shutdown Outlook before you download the Plugin from CRM:



❶ Select My CRM.

❷ Click on the My Preferences tab.

❸ Select the Install CRM Outlook Integration button.

Verify and accept the security prompts and dialog boxes, then restart Outlook.

When you restart Outlook, you should see new CRM Synchronization buttons on the toolbar. Tasks and Appointments less than seven days old, and those with a future date specified, automatically get synchronized when you select the Sync button in Outlook. Use the My Contacts tab in CRM to select contacts for synchronization with Outlook.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Marketing user.

If you are interested in going into more detail on the basic contact management areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Moving Around
- Finding Information
- Working with Lists
- Adding Customer Information
- Doing Your Work
- Working with MS Outlook
- Managing Documents
- My Dashboard
- My Preferences

Chapter 2
Marketing

With CRM Marketing you can:

- Set up marketing campaigns and track their costs, effectiveness, and measure leads that turned into real business
- Set up dynamic sets of prospect profiling data
- Perform e-mail blasts to your prospect database
- Import and qualify raw lead data from your Web site or purchased contact lists
- Use outbound call lists for repetitive high volume phone-based campaigns

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

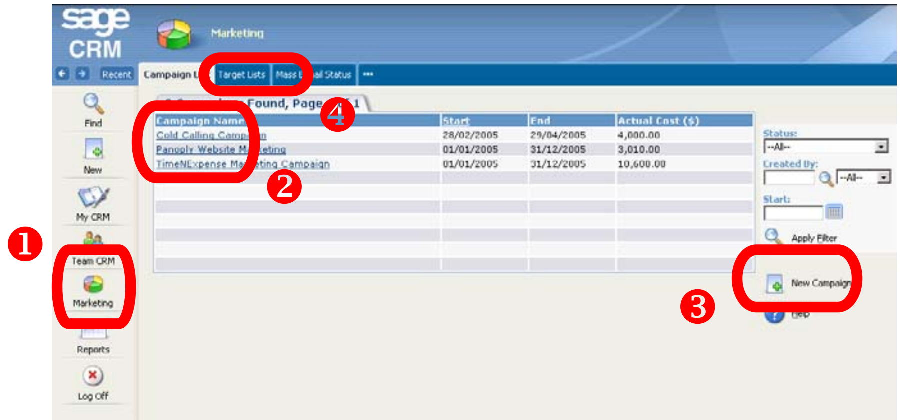
For this chapter, you can log onto CRM as:

Name	Logon ID	Profile
Dave Montana	montanad	Marketing Manager

This user does not require a password.

Where is the control hub of Marketing?

As a Marketing Manager, you will be responsible for setting up campaigns and performing database selections for those campaigns.



❶ Click on the Marketing menu button.

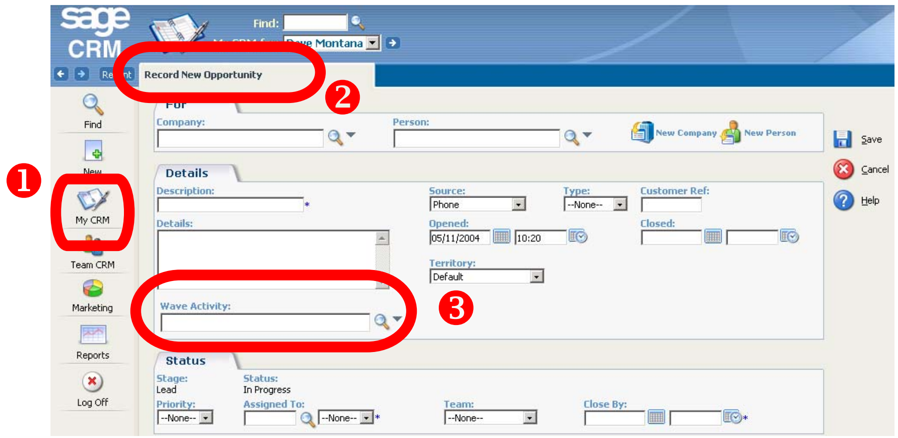
❷ The Campaign List tab shows you a list of all campaigns. They are all hyperlinked for you to drill down on the different phases or “Waves” and “Wave Activities”.

❸ You can add a new campaign, with associated Waves and Wave Activities by clicking on the New Campaign action button.

❹ The Target Lists tab allows you to make selections of data in the system and perform marketing actions against those lists.

What are Wave Activities good for?

Linking wave activities to leads, sales opportunities, and general customer interactions are key to tracking the effectiveness of your marketing efforts.



1. Click on the My CRM button, and select the Opportunities tab.

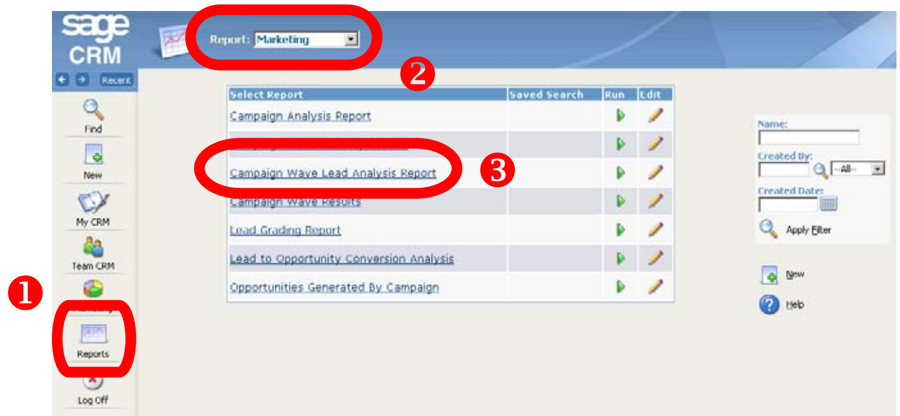
2. Clicking on the New Opportunity action button on the right-hand side of the screen displays the Record New Opportunity page.

3. The Wave Activity field allows you to link a sales opportunity to a specific phase of a Marketing campaign.

   The ability to link sales opportunities like this one, and also individual communications such as callbacks, and leads, to a phase or wave of a campaign persists throughout CRM. This means you can track every success or failure during the course of your campaign.

How can I measure the success of a Campaign?

Use one of the existing reports to see how you can track a campaign's effectiveness.



❶ Click on the Reports menu button.

❷ Select Marketing from the list in the context area of the screen.

❸ Click on the hyperlink of the report called "Campaign Wave Lead Analysis Report".

In the search criteria, set the Campaign Wave Name to contain "TimeNExpense", and run the report.

This produces a report showing leads generated from the campaign wave and their current rating and status.

You can select your report output to be on-screen in CRM, or in PDF, MS Excel, or CSV format.

What can I do next?

You can move onto the next chapter and try out some of the key tasks of a Sales user.

If you are interested in going into more detail on the Marketing areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Lead Management
- Outbound Call Handling
- Running Reports and Writing Reports
- Campaign Management
- Target Lists

We also recommend checking out the following chapters of the *System Administrator Guide*:

- Key Attribute Profiling

Chapter 3
Sales

With CRM Sales you can:

- Track opportunities as they move through the sales cycle
- Create Quotes and Orders and link line items to them
- Assign opportunities and tasks to colleagues for team selling
- Report and analyze sales progress, forecasts, and lists

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

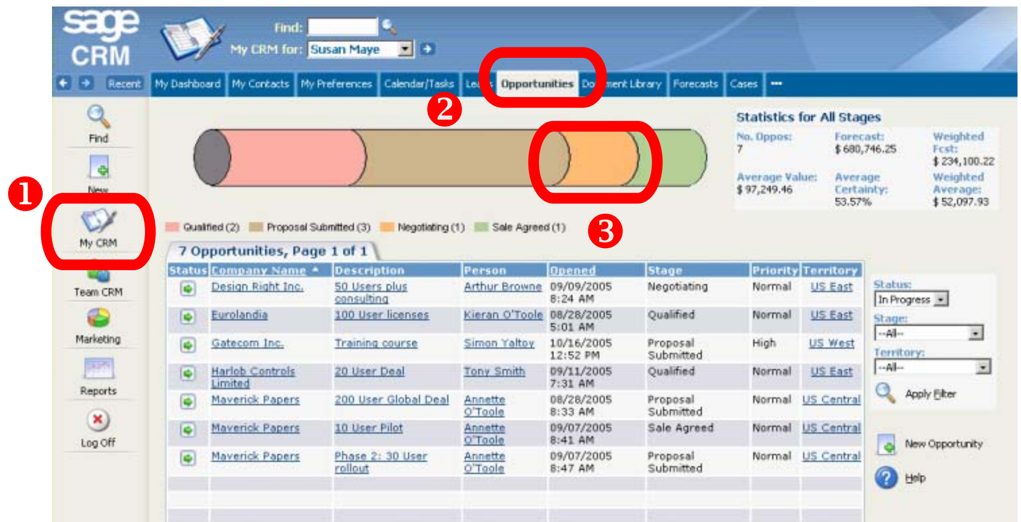
For this chapter, you can log onto CRM as:

Name	Logon ID	Profile
Susan Maye	mayes	Sales

This user does not require a password.

What's in my Pipeline?

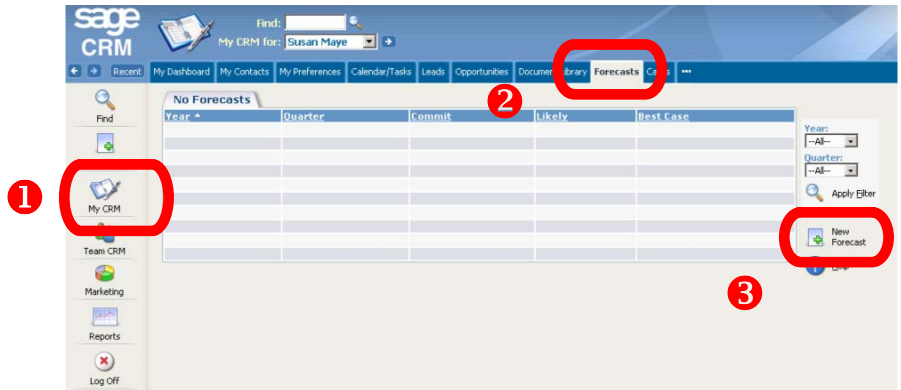
You can view a graphical and list representation of Susan Maye's current sales pipeline.



1. Select My CRM.
2. Click on the Opportunities tab.
3. Click on a segment to toggle the drill down view.

My manager needs my forecast!

You can create and submit a new sales forecast.



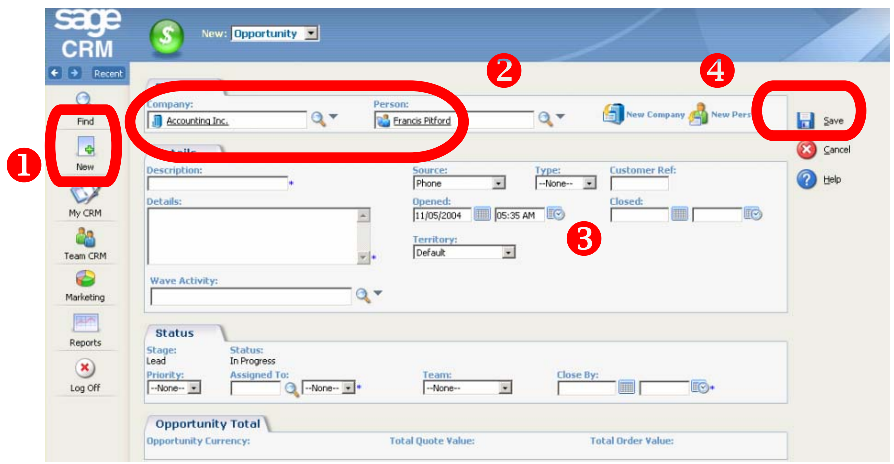
❶ Select My CRM.

❷ Click on the Forecasts tab.

❸ Click on the New Forecast button.

How do I capture a new Sales Opportunity?

One of your existing customers, Francis Pitford from the company Accounting Inc., has a serious interest in your latest product.



❶ Right-click on the New menu button, and select Opportunity.

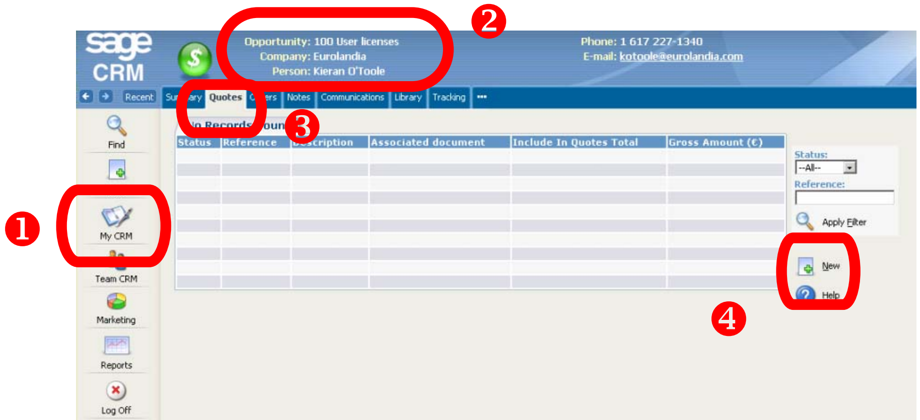
❷ Use the advanced search select buttons to set the For panel to link to Francis Pitford at Accounting Inc.

❸ Fill in the Opportunity details.

❹ Click on the Save button.

How do I create a Quote and turn it into an Order?

You can generate Quotes and Orders for your Opportunities, and link line items to them.



1. Click on the My CRM button, then select the Opportunities tab.

2. Click on the hyperlink of the "100 User License" sales opportunity with Eurolandia.

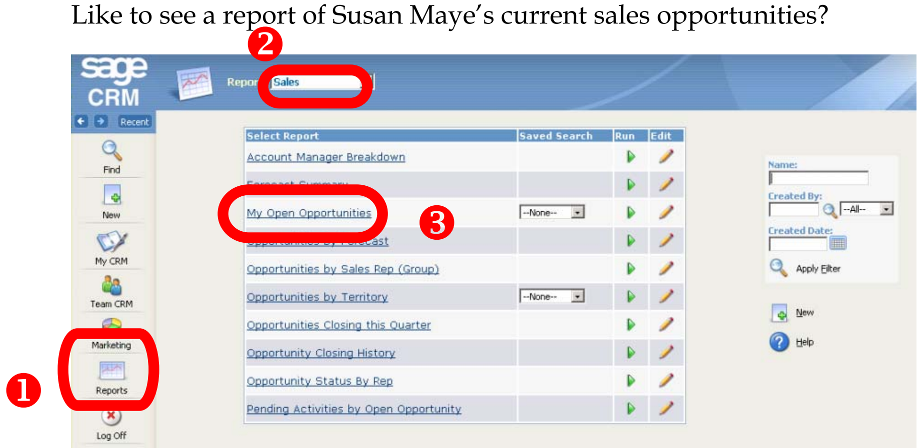
3. Click on the Quotes tab.

4. Click on the New action button on the right-hand side of the screen to create a Quotation. You can then enter Quote summary information, add line items, and select Next.

   A number of action buttons become available, giving you the option to promote the Quotation to an Order, create a printed version of the Quotation, and so on.

How can I get an overview of my progress?

Like to see a report of Susan Maye's current sales opportunities?



❶ Click on the Reports button.

❷ Select Sales at the top of the screen.

❸ Click on the hyperlink of the My Open Opportunities report.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Customer Care users.

If you are interested in going into more detail on the Sales areas touched on in this chapter, we suggest you check out the following chapters of the *CRM User Guide*:

- Lead Management
- Closing A Sale
- Sales Forecasting
- Reporting

Chapter 4
Customer Care

With CRM Customer Care you can:

- Log customer care calls
- Track customer care issues as they progress through to resolution
- Monitor Service Level Agreement adherence
- Publish solutions and key word searches of a solutions database
- Escalate overdue cases

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

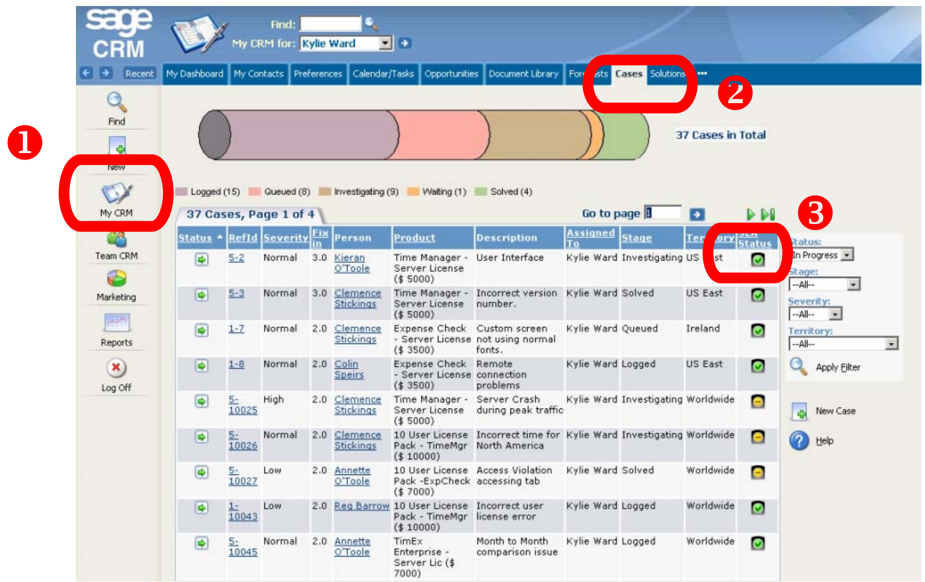
For this chapter, you can log onto CRM as:

Name	Logon ID	Profile
Kylie Ward	wardk	Customer Care Manager

This user does not require a password.

Where is my list of current Customer Care Issues?

All Kylie Ward’s Customer Care Cases that she is currently working on are accessed from the My CRM work area.



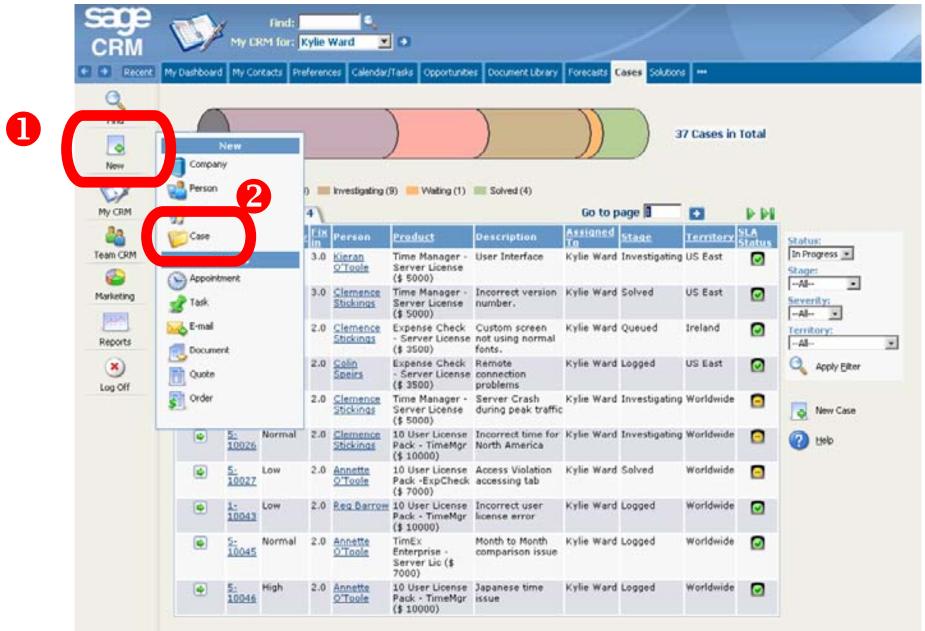
❶ Select My CRM.

❷ Click on the Cases tab.

❸ The SLA Status column shows which cases are within, approaching, or breaching the Service Level Agreement (SLA) with the customer.

How do I log a new Customer Care Case?

Kylie doesn't have to go far to add a new case.



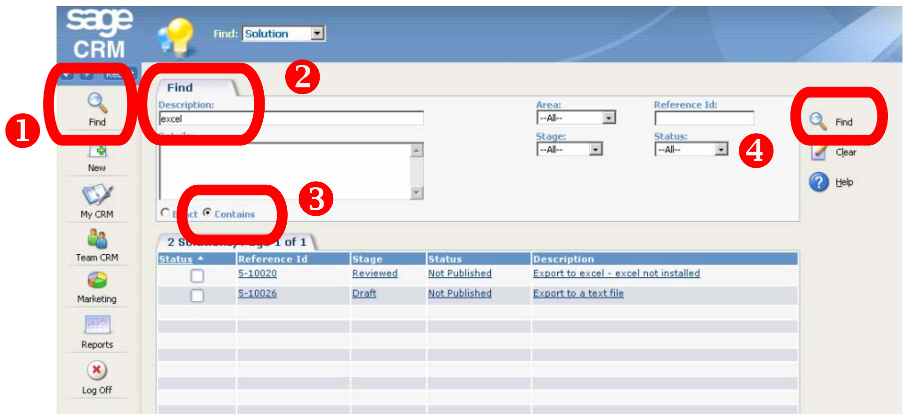
❶ Right-click on the New menu button.

❷ Select Case from the Pop Out list.

Fill in the For panel on the New Case page to link the case to a customer record.

This one sounds familiar—how do I search the Knowledge Base?

If you think you might already have the answer to a customer care case, search your existing knowledge base of solutions first.



❶ Right-click on the Find menu button, and select Solution.

❷ Type a key word in the Description field. For example, **excel**.

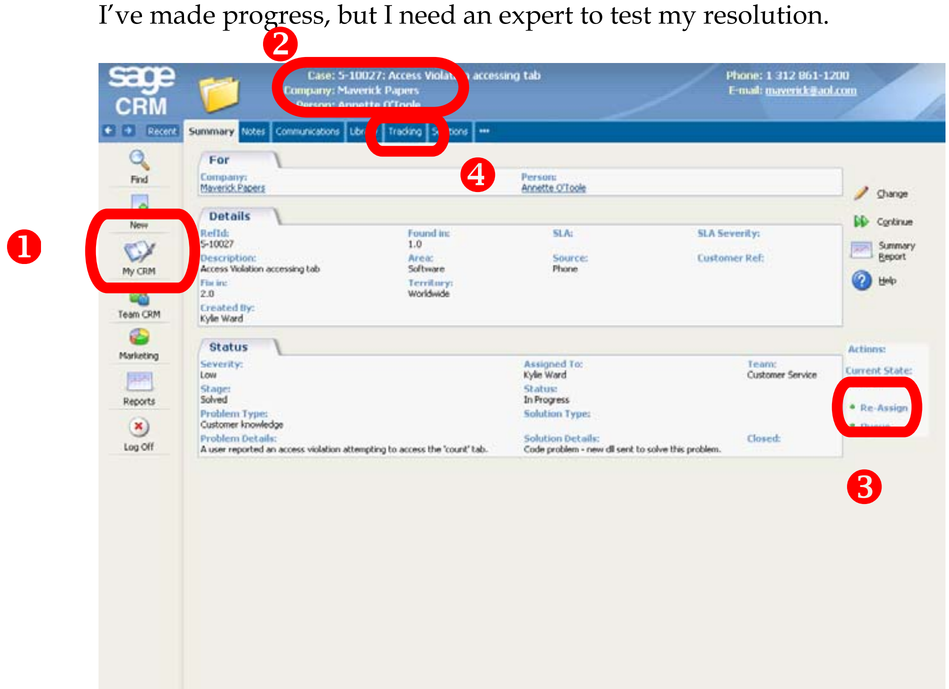
❸ Click the Contains button.

❹ Click the Find action button.

A list of all matching Solutions in the Knowledge Base is displayed. Click on the hyperlink of the Solution for more detail.

How do I update the Status of a Case?

I've made progress, but I need an expert to test my resolution.



❶ Select My CRM.

❷ Select the Cases tab, and click on the hyperlink of any case with a status of "Solved". The case should be displayed at the top of the screen

❸ Click on the Re-Assign workflow bullet to pass this case on to a colleague.

❹ All changes made to the case can be audited from the Tracking tab.

Which customer has the most open customer care issues?

A simple report can give you an overview.

❶ Click on the Reports button.

❷ Select Customer Care at the top of the screen.

❸ Select the In Progress saved search.

❹ Click on the Run button.

What can I do next?

You can move onto the next chapter and try out some of the key tasks for Administrator users.

If you are interested in going into more detail on the Customer Care areas touched on in this chapter, we suggest you check out the following chapters of the *User Guide*:

- Caring For Customers
- Knowledge Base
- Reporting

Chapter 5
Administration

With CRM Administration you can:

- Customize field, screen, and list layout.
- Modify reports and document templates.
- Design and update business workflow processes.
- Change user setup and security access settings.
- Import data from MS Excel spreadsheets.
- Set up business calendars and Service Level Agreements.

This chapter takes you through a brief snapshot of some of the key tasks.

Who can I log on as?

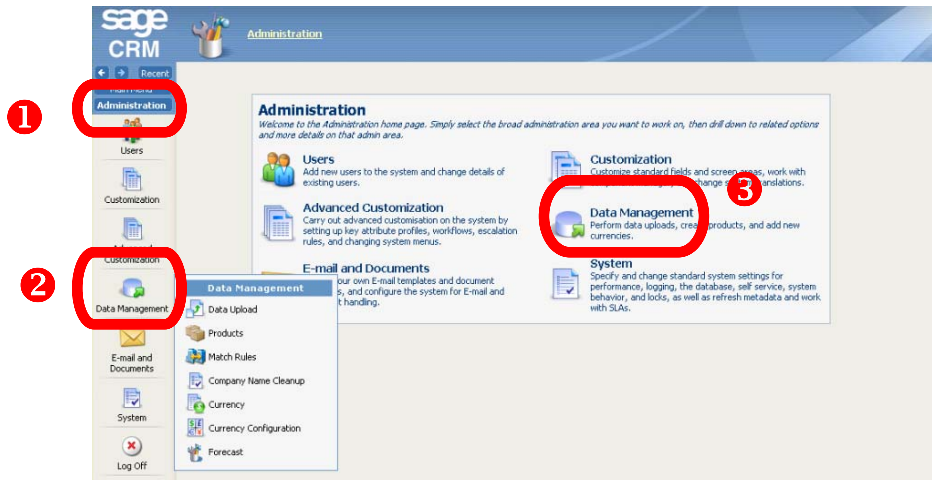
For this chapter, you can log onto CRM as:

Name	Logon ID	Profile
System Administrator	admin	System Administrator

This user does not require a password.

How do I access the Administration area?

The Administration button is the gateway for all system administration tasks in CRM.



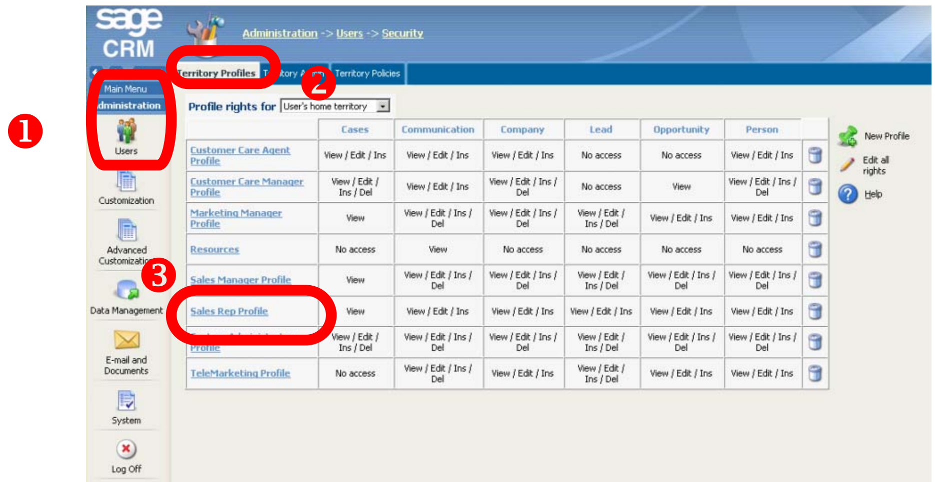
❶ Select the Administration button to access the Administration menu and display the Administration home page.

❷ Right-click on any of the Administration menu options and select an item from the pop out list to drill down to the administration area you want to work on.

❸ Alternatively, select an option from the Administration home page to drill down to that option's home page. For example, selecting Data Management brings you to the Data Management home page.

How can I edit a User's Security Profile?

CRM allows you to set up permissions for users for accessing information stored in CRM. For example, a US user may only have access to sales information in their region.



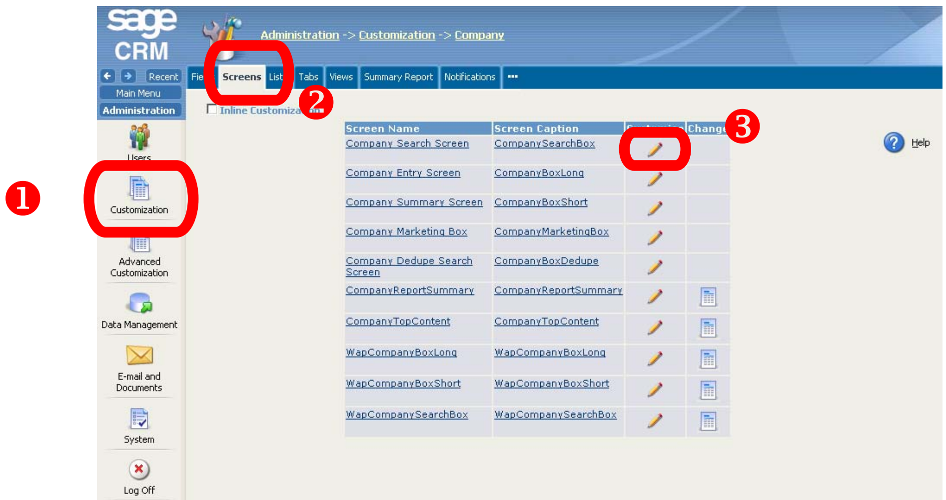
❶ Select Administration, then right-click on the Users menu button and select Security.

❷ Select the Territory Profiles tab.

❸ Select the profile you want to edit. This will show the access rights in edit mode, as well as all the users associated with this profile.

How do I change the Company Search screen layout?

Want to switch the order of the fields on one of the screens?



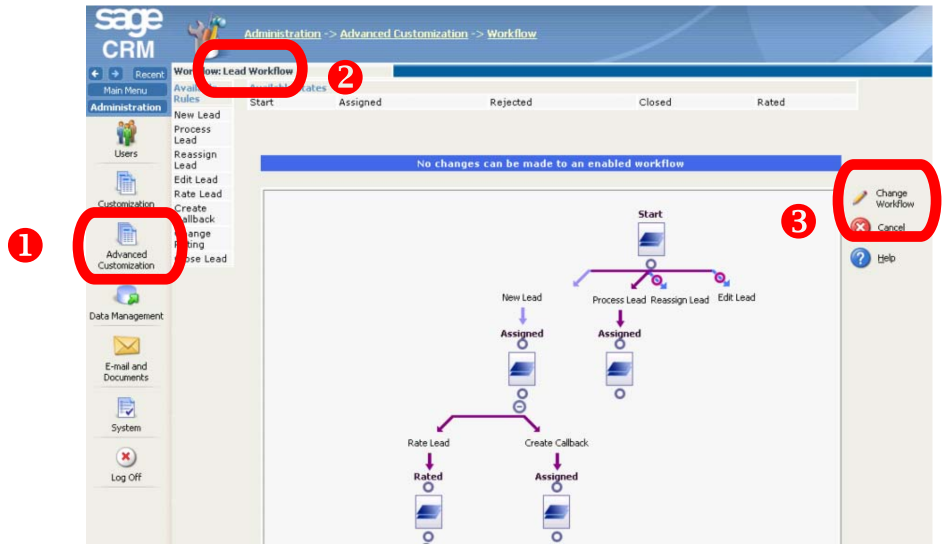
❶ Select Administration, then right-click on the Customization menu button and select Company.

❷ Select the Screens tab.

❸ Click on the Customize button next to the Company Search Screen.

How can I review the Lead Workflow design?

You can view, edit, and create new graphical workflows.



❶ Select Administration, then right-click on Advanced Customization and select Workflow.

❷ Click on the hyperlink of the Lead Workflow.

❸ Click on the Change Workflow button.

What can I do next?

If you are interested in going into more detail on the Administrator areas touched on in this chapter, we suggest you check out the following chapters of the *System Administrator Guide*. The chapters that most budding Administrators go for straight away are:

- User Administration
- Field Customization
- Screen Customization
- Workflow Customization
- Data Upload
- Reporting
- Document Templates

CRM Document Version Code: USE-QSG-ENG-570-1.0/SG