

### SageCRM Enhancement: Quick Communication buttons

One of the main benefits of a CRM system is the tracking of sales activities. You want to make this communication tracking as easy and efficient as possible for your CRM users.

If you have repetitive communications that you are expecting your CRM users to enter, Effective Solutions can implement Quick Communications buttons in your SageCRM system to allow users to create the communications with just 2 clicks!

Let's say your CRM sales users perform 2 repetitive sales activities: Checkin Calls and Quote Followup Calls.

We can build buttons in your SageCRM system and make them appear on key screens in CRM, so the user can simply click on the button, enter in the call notes and click SAVE. Everything else is preset for them in the communication entry.

Here is an example of what the buttons look like on the screen. We can add them to any screen in SageCRM.

The screenshot shows a person record for George Kramer. On the right side, there is a vertical menu of actions. Two buttons, 'Checkin Call' and 'Quote Followup', are highlighted with a red box. A callout box with an arrow points to these buttons.

When you click on the Quick Communication button, you get the following screen to enter in your call notes

The screenshot shows the 'Quick Entry Communication - Checkin Call' form. It includes a 'Save' button in the top right corner. Below the header, there is a text area for 'Enter Details' containing the text: 'They said that business has picked up for them recently. They are hoping to budget for new conference room furniture in the 3rd Quarter.'

When you click on SAVE, the communication record is created in SageCRM with the predefined settings you get to specify when we build the buttons for you. (status, action, subject, date, user, etc)

The screenshot shows a table with one communication record. The table has columns for Date / Time, Action, Person, Subject, Details, User, Territory, External Attendees, About, and Status.

Date / Time	Action	Person	Subject	Details	User	Territory	External Attendees	About	Status
Today 9:30 AM	Phone Out	Bill Jones	Checkin Call	They said that business has picked up for them recently. They are hoping to budget for new conference room furniture in the 3rd Quarter.	Deb Taylor	Worldwide	<input type="checkbox"/>		✔

This is a great time saver for your SageCRM users!

**Reach out to Effective Solutions for pricing**