Adding a new company

1. Click **New (The plus sign in the right hand corner of the screen in a green circle) | Select New Company.**

2. Type the first few letters of the company name, and click **Enter Company Details**. The system searches for possible duplicate company names.

   For more information on deduplication, please refer to *[Preventing duplicate entries](). If no potential duplicate company is found, the **New Company** page is displayed.

3. Fill in the details for the new Company record.
   Your System Administrator determines the minimum amount of details you must enter.
   You can use the following fields:

   - [Company fields]()

   - [Address fields]()

   - [Phone and email fields]()

   - [Person fields]()

   - [Person phone details fields]()

   - [Person email fields]()

   - [Adding a company with multiple sites]()

   Click **Save**. You may need to scroll back to the top of the page to do this

*Preventing duplicate entries

Deduplication is enabled by default. Your System Administrator can customize deduplication screens and match rules.

The default Person match rule checks if Last Name contains the value you entered. For example, if you enter *Smith*, both *Smith* and *Blacksmith* are detected as possible duplicates.

The default Company match rule checks if Company Name contains the value you entered. For example, if you enter *Right*, *Design Right* is detected as a possible duplicate.

By default, deduplication checks for duplicate people within a company. You're warned if there are two people with the same name in the same company. However, you're not warned if there are two people with the same name in different companies.

To check for duplicate records before adding a new company:

1. Click **New | New Company**.

2. Enter the company name and click **Enter Company Details**. If the name matches a current company record in the database (according to the match rules defined by your System Administrator), a list of detected duplicates is displayed.
   From the list of detected duplicates you can:

   - Click an existing company.

   - Return to the Company duplicate find page by clicking **Back To Company Entry**.

   - Proceed to add a new company by clicking **Ignore Warning And Enter Company**.

3. To add a new company anyway, click **Ignore Warning And Enter Company**.

4. Enter the Company details, and click **Save**. The new company is added to Sage CRM.

   The system also checks for duplicates if you change any field that have match rules set on them when you edit a record. For example, you change the company name of an existing company *Design Right Inc.* to *Design*. The system checks for other companies, which contain the word *Design*, and warns of possible duplicates, before updating the Company record.

Adding a new person to an existing company

1. Open the company you want to make changes to, and click the **People** tab.

2. Click **New Person**.

3. Type the first few letters of the person's **last name**, and click **Enter Person Details**. The system searches for possible duplicate person names in the system. For more information, please see Preventing duplicate entries. If no potential duplicate person is found, the New Person page is displayed.

4. Fill in the necessary details.Some details are filled in automatically using the Company details. You can overwrite them if needed.

- o To link an address to a person only, select **Person address only**. To link the address to both the person and the company they work for, select **Person and company address**.
- o To select an address from the list of Company addresses, click **Select address from list**.

5. Click **Save**.

Adding a note

You can add an unlimited number of text notes to the system, and attach them directly to the records where they are most relevant. You can add notes to Companies, People, Cases, Solutions, Sales Opportunities, and Leads.

1. Open the record you want to edit, and click the **Notes** tab.

2. Click **New Note**.

3. Type the text of the note.

4. Click **Save**.

Creating a new lead

1. Click **TEAM CRM | New Lead**. The Lead Duplicate find screen is displayed.

2. Enter the first few letters of the lead company name, and the lead person name.

3. Click **Enter Lead Details**. Sage CRM searches for possible duplicate lead records. For more information on deduplication, see Preventing duplicate entries.

4. If a potential duplicate lead record is found, a warning is displayed.

- To create the lead record regardless of the warning, click **Ignore Warning and Enter Lead**.

- To return to the Lead Duplicate find screen to change the new lead details, click **Back to Lead Entry**.

5. If no duplicate lead record is found, the New Lead page is displayed.

6. Complete the lead fields and click **Save**. For more information, see Lead fields.

7. When a lead is created, you can:

- Add notes to leads from the **Notes** tab.

- Add and view communications linked to the lead from the **Communications** tab.

- Track changes made to the Lead record from the **Tracking** tab.

Matching a lead to an existing company

Once you create a lead, a **Possible Company Match** message is displayed if the company details you entered seem to already exist in Sage CRM.

If your lead has a company match, you can link the raw lead details to the Company record. This provides you with a valuable source of information on the company you're dealing with, which may assist in the lead qualification process.

1. Click **Add Or Find This Company**.

2. Click the company match. The **Company Summary** page is displayed in a new browser window.

3. If you think you're dealing with this company, click **Select Company**.

   You can match people too. Just click **Add Or Find This Person**.

   If the company exists but not the person, you can add a new person now or when are ready to convert the lead to an opportunity. Remember that the unqualified lead data is separate from your core "clean" data. If the person does not yet exist in your People records and the lead turns into a dead end, you have added a low value contact into your core company database.

   If there is a company and person match, priority is given to the company. This means, when you match a lead with a company, the person drop-down is automatically limited to existing people in that company.

   If the lead turns into a potential sale (Opportunity), you must incorporate the Lead Company and Person into the main Company and People records. For more information, see [Converting a lead to an opportunity](#).

Converting a lead to an opportunity

Once a lead has been qualified and identified as a genuine sales opportunity, you can convert the lead to an opportunity.

Before converting, the lead first needs to be matched to an existing company and person. This ensures that when the opportunity is created, it is assigned to a true company and person (rather than existing as a disassociated entity, as a lead normally does).

You can match the lead to existing Person and Company records. If the data is not yet in the system, add a new company and person, or just add a new person if the company already exists, but the person is new.

1. Find and open the lead you want to convert to an opportunity.

2. On the Lead Summary page, click **Convert To Opportunity**.
   If you have not yet matched the lead to a company or person, a warning dialog box is displayed.

3. Click **Add Or Find This Company** on the Lead Summary page to match the lead to a company.

   - The system automatically searches for an existing company in the database that matches the company name on the lead.

   - If the system finds a name that begins with the company name you have already entered, it first gives you the option of selecting the existing company.

   - If you already matched the company at an earlier stage, and just need to match up the person, you can skip the next steps and click **Add Or Find This Person**.

   - If no matching company is found, or if you choose to ignore suggested matches, the New Company page is displayed in a new browser window. This page takes over details, such as Company Name and Person Name, already entered against the lead so that you do not have to retype them. Complete any further known details on the New Company page.

4. Click **Save**.

5. Click **Select Company**. The lead is matched to the new company and person that you have added to the system.

6. Click **Convert To Opportunity**. For more information on the Opportunity fields, see Creating a new opportunity.

7. Complete any further known details on the Record New Opportunity page.

8. Click **Save**. The Opportunity Summary page is displayed.

   A converted opportunity has the following features:

- A **View Lead** button on the Summary page. This allows you to switch between the details of the opportunity and the lead. You can view communications associated with the lead, but you can no longer add communications to the lead once conversion has taken place.

- An **Opportunity Tracking** tab. This shows a record of the conversion from Lead to Opportunity.

- Communications which were created in the context of the lead are displayed in the **Communications** tab of the Opportunity.