

# Sage CRM 7.3 Release Preview



# Introduction

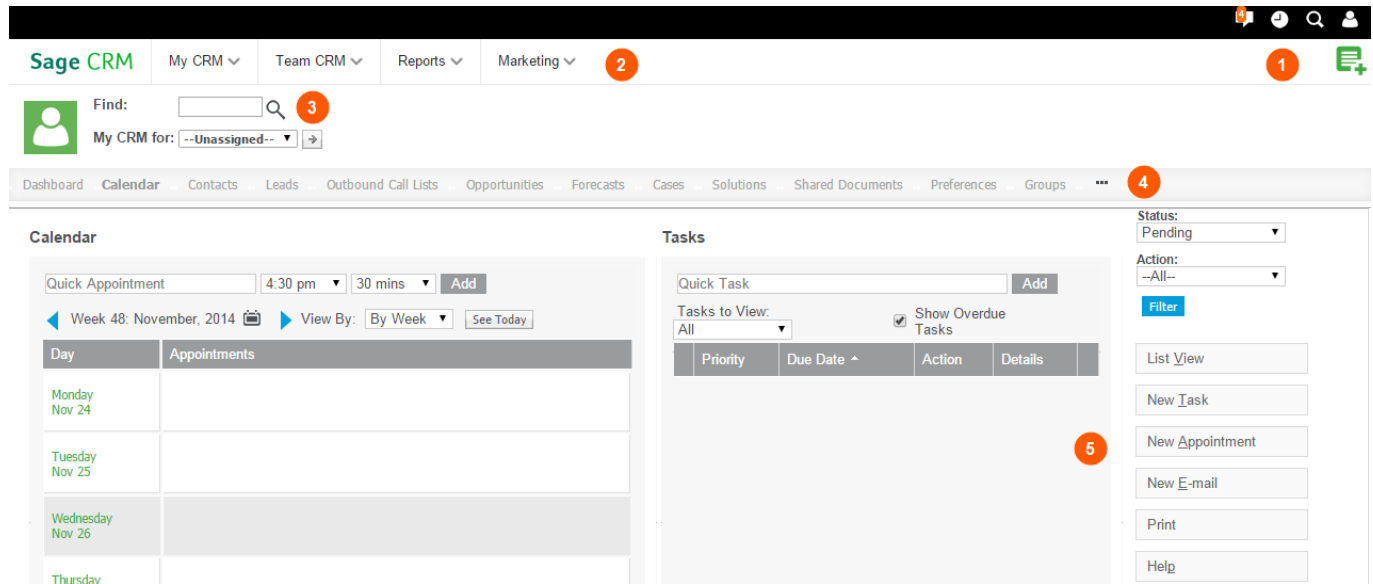
This Release Preview provides information about new Sage CRM 7.3 features, and enhancements to existing features. We've included a description of each feature, with tips and instructions to help you start working with the new release.

- Contemporary theme
- Business accelerators
  - Management dashboards
  - New charts and reports
  - Workflow enhancements
  - Escalation rules
  - Quick quotes and orders
  - Merge to PDF and Merge to Word
- MailChimp
- Mobile enhancements
- Enhanced text editor
- Lead deduplication

# Contemporary Theme

The **Contemporary Theme** is an optional User Interface theme for existing Sage CRM customers and the default theme for new Sage CRM customers. The theme has been designed to help you be more productive and access the information you need more easily.

The Contemporary theme differs from the default Sage CRM theme in several ways. For more detailed information, see the *Contemporary Theme Guide*.



1. Top Bar icons and buttons let you quickly view your notifications, recently viewed records, and your profile area. You can also easily return to your home page, and find and create new records.
2. Main Menu drop-down lists let you access all Main Menu options, including My CRM and Team CRM options, from anywhere in Sage CRM.
3. The **Find** field lets you quickly search for other Sage CRM users, so you can switch from **My CRM Mode** to the My CRM Mode of a colleague. You can also switch from your **Team CRM Mode** to the Team CRM Mode of another team. Your System Administrator must grant you permission to do this.
4. Horizontal tabs allow you to easily navigate through all subpages of an existing record.
5. Restyled action, workflow, and Help buttons are located on the right-hand side of each screen so you always know where to find them.
6. The Administration area has new icons and a new background color to match the look and feel of the Contemporary Theme UI.

## Changing the default theme at a system level

As a System Administrator, you can apply the new Contemporary theme across the Sage CRM system. However, if a user has already selected a preferred theme, your system change won't affect that user's preference.

1. Click **Administration | System | System Behavior**. The System Behavior page is displayed.
2. Click **Change**.
3. Choose **Contemporary** from **Default System Theme** and click **Save**. The new theme is displayed the next time you log on.

## Changing the default theme at a user level

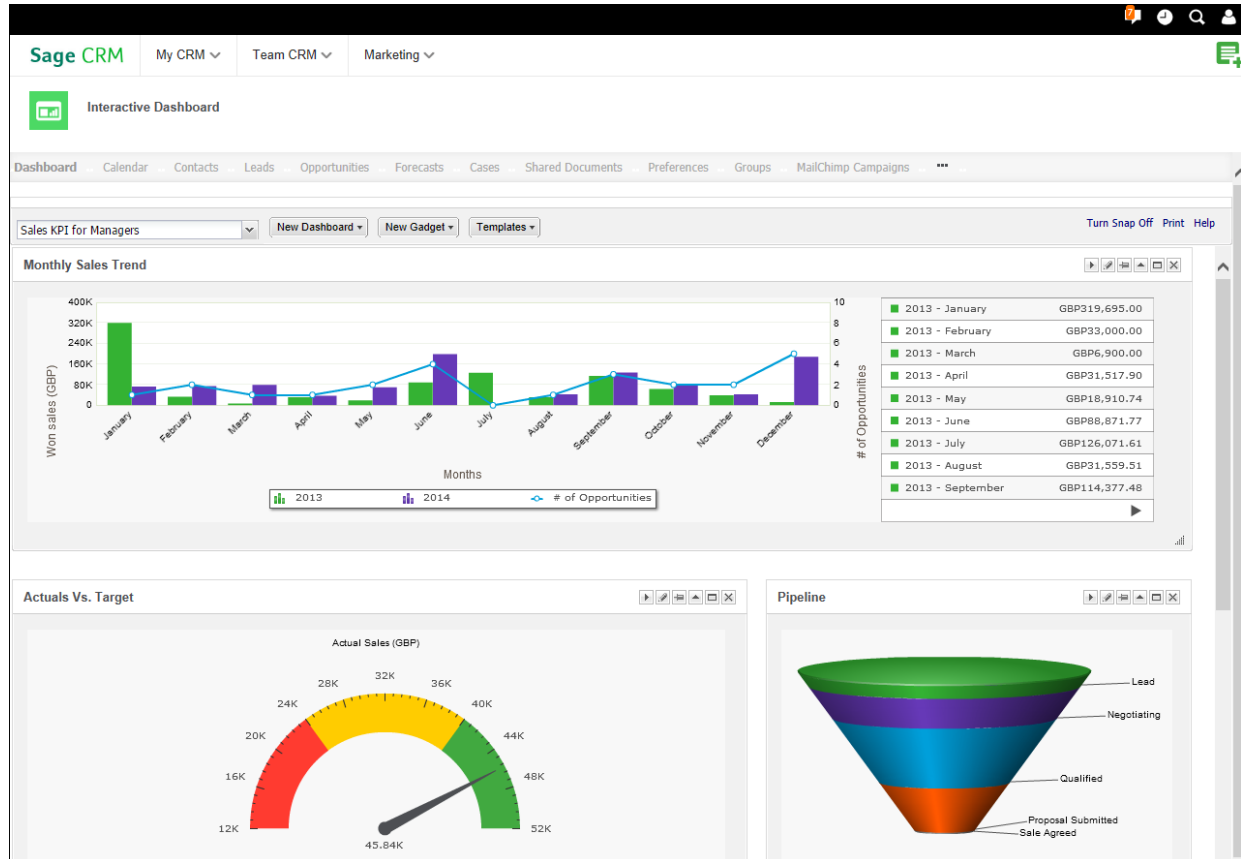
As a user, you can set the new Contemporary theme as your preferred theme.

1. Click **My CRM | Preferences**.
2. Click **Change**.
3. Choose **Contemporary** from **Preferred Theme** and click **Save**. You must log off and log on again to see the new theme.

# Business accelerators

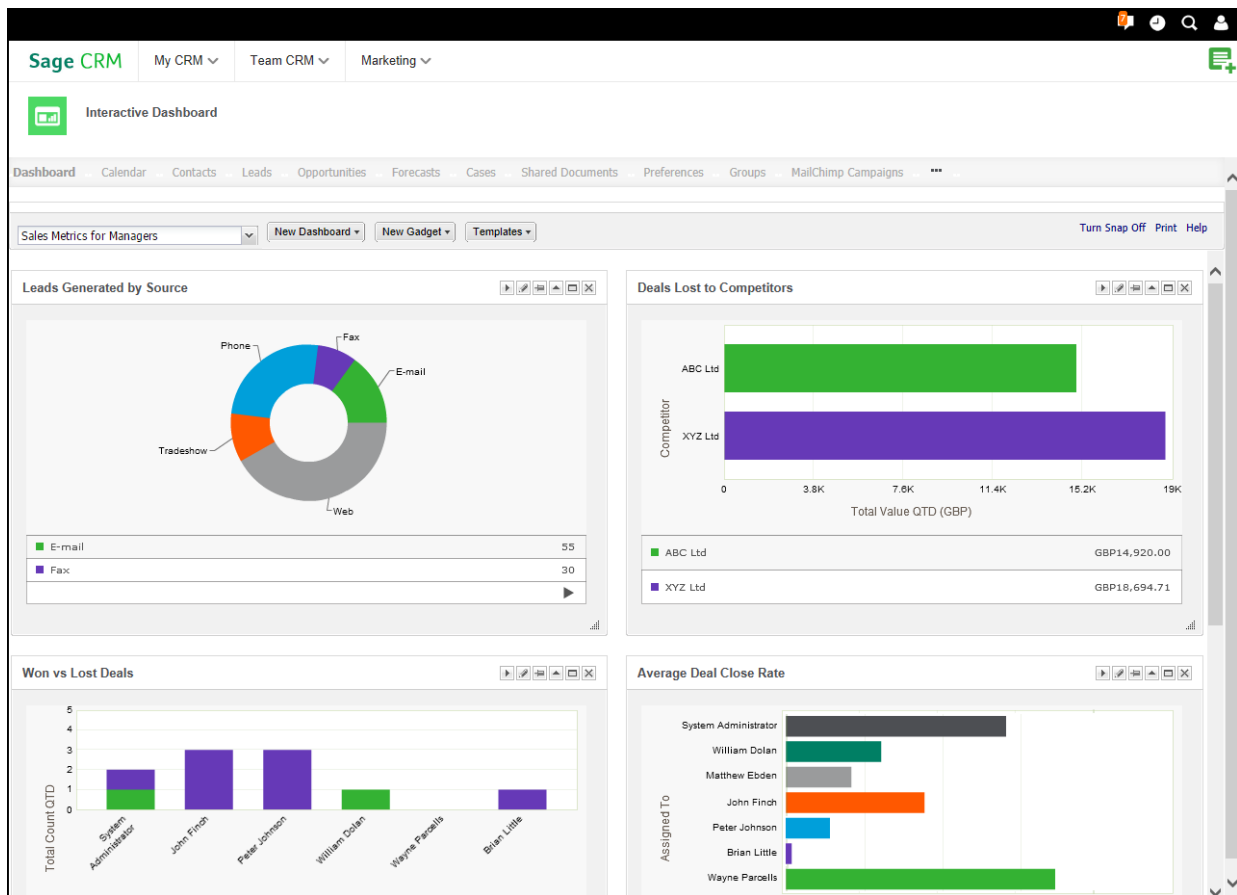
## Management dashboards

Two new ready-to-use Management dashboards are available for CEOs. Each dashboard includes configurable gadgets that use Sage CRM data from across your organization.



**Sales KPI for Managers** displays key performance indicators to help you identify and measure your organization's successful activities.

- **Monthly Sales Trends** compares the value of sales won this year with the value of sales won last year. It also shows the number of opportunities that were won this year with a trend line. It uses a combination chart.
- **Actual vs Target** shows the opportunity revenue that's been won as a percentage of forecasted sales. It uses a gauge chart.
- **Pipeline** shows information about all currently open opportunities grouped by lead. It uses a funnel chart.
- **Open Activities** displays information about calendar entries for a specific period such as demos, letters to be sent, and meetings. It uses a stacked chart.
- **At Risk Customers** shows customers and leads who haven't been contacted in over 90 days, or customers and leads in a company that's greater than 90 days old who've never been contacted. These customers are considered at risk of leaving your company.
- **Won Deals Leaderboard** displays the number of opportunities that each sales rep has won.



**Sales Metrics for Managers** displays information to help you measure progress towards your organization's goals.

- **Leads Generated by Source** shows the number of leads in your system according to how they were sourced.
- **Deals Lost to Competitors** displays deals that your organization was bidding on but lost to a competitor. The report is based on the new **Competitor**, **Winner**, and **Reason for Loss** fields in each opportunity record.
- **Won vs Lost Deals** shows opportunities that each sales rep has won and lost in a specified period of time.
- **Average Deal Close Rate** displays the amount of time between a new opportunity being created and closed. The information is grouped by sales rep.
- **Cross-sell Deals** shows the number of cross-sell opportunities created during a specific time period by each sales rep. A cross-sell opportunity is one that's created when another opportunity closes. For example, if you sell a computer, a cross-sell opportunity could be to sell a maintenance plan for the computer.
- **Top Open Deals** displays the number of current opportunities that are in progress and greater than a specified value. The information is grouped by company.

As a System Administrator you can view Management dashboards and make them available to other users. For more information, see *Creating a dashboard from a template* and *Assigning users to a dashboard template* in the *User Guide*.

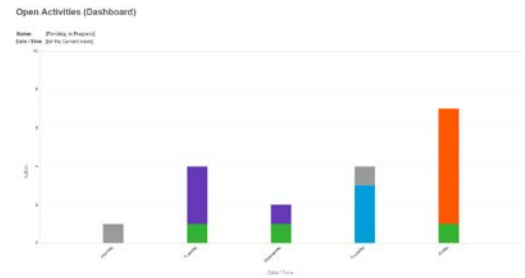
To include an opportunity in the Monthly Sales Trends, Actual vs target, Won Deals Leaderboard, Deals Lost to Competitors, and Won vs Lost Deals reports, the date in **Closed** on the opportunity record must be within the relevant time period.

## New charts and reports

### New charts

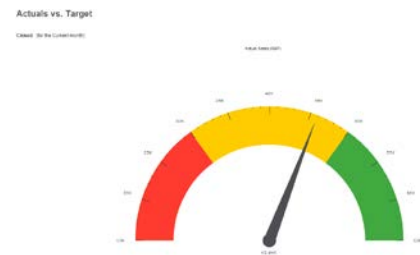
#### Stacked

Bars are stacked on top of each other to display grouped data. It provides a wider view of data than a regular bar chart. A stacked chart is useful in an *Open Activities* activity report to show several actions that occurred on a particular day or date.



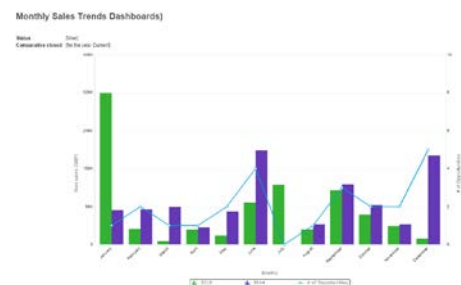
#### Gauge

Partitions on the chart indicate three ranges in relation to a target value; below, approaching, exceeded. The gauge needle indicates the current value. A gauge chart is useful in an *Actual vs Target* sales report to show how your actual sales compare to your forecasted sales for a particular period. You could also use a gauge chart in a customer service report to show how you're performing against your SLA target. For more information, see *Adding a gauge chart to a sales report* in the *User Guide*.



#### Combination

A bar chart indicates one set of data and a line chart indicates another set of data so you can get a wider view of results in one place. A combination chart is useful in a *Monthly Sales Trends* report to show information such as the revenue earned from sales and the number of sales that were closed in a particular period. You could also use a combination chart in a customer service report to show the number of cases opened compared to the number of cases closed in the system for the current year. For more information, see *Adding a combination chart to a customer service report* in the *User Guide*.



To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server.

### New reports

There's a new reporting category called **Dashboards**. It contains ready-to-use reports that are configured to use the new chart types and are also displayed on the Management dashboards. To view, edit, or run the reports, click **Reports | Dashboards**. For a description of each report, see [Management dashboards](#).



## Workflow enhancements

### Quick Sale Workflow

The Quick Sale Workflow is a new predefined workflow with fewer stages than the standard Opportunity Workflow. It's designed for products that don't require a complex sales cycle and can be sold in a few steps. To activate the Quick Sale Workflow, click **Administration | Advanced Customization | Workflow | Quick Sale Workflow** and click **Activate Workflow**. Users can then create a new quick sale from the Opportunity summary screen. For more information, see *Quick Sale Workflow* in the *User Guide*.

### New rules in Opportunity Workflow

**Deal lost** and **cross-sell** rules have been added to the standard predefined Opportunity Workflow to more accurately progress your opportunities.

- If the deal that you were bidding on is won by another company, you can set the status of the opportunity to **Lost**. Three new fields allow you to capture information about competitors bidding on the deal, the actual winner of the deal, and the reasons why the deal was lost.
- A cross-sell rule lets you create a new opportunity based on an opportunity that you've already won. For example, if you win a deal to sell computers, you could create a new opportunity to sell computer maintenance plans. The cross-sell rule is available at the *negotiating* and *sold* stages on predefined opportunity workflows.



## Escalation rules

Sage CRM 7.3 includes new ready-to-use escalation rules that display information on screen to notify sales managers and sales users about leads, quotas, and opportunities. By default, the notifications are sent to the System Administrator only. You can customize the rules so that a notification is sent to a sales manager, sales user, or to a group of different users. For more information, see the *System Administrator Guide*.

Escalation rule	Description
Quarterly Quota Remaining	Notify a sales user at the end of each month about the percentage and amount of their remaining quota for the quarter.
Daily Quota Remaining	Notify a sales user daily about the percentage and amount of their remaining quota for the month.
Pipeline Update	Notify a sales user every two weeks about the value of their pipeline for this quarter, compared to their forecast total for the quarter.
Opportunity Close Date Approaching	Notify the assigned user of an opportunity that the opportunity close date is in five days.
Unassigned Lead	Notify sales managers when a new lead has been unassigned for more than five days.
Unassigned Opportunity	Notify sales managers when a new opportunity has been unassigned for more than five days.
High Value Opportunity Won	Notify sales team members and sales managers when a high value deal is won. The System Administrator can configure the high value opportunity amount.
High Value Opportunity Created	Notify sales managers and send them an email when a high value opportunity is created. This uses <b>Total Quote Value</b> on the opportunity. The System Administrator can configure the high value opportunity amount.
Quote Discount Value too large	Notify sales managers and send them an email when a quote line item discount exceeds 40%.
Lost Opportunities	Notify the sales manager when a deal has been lost.

## Filtering escalation rules

1. Click **Administration | Advanced Customization | Escalation**.
2. Enter search criteria in the **Filter** fields. For example, to find all enabled escalation rules for lost opportunities, you could use the following search criteria.
  - **Lost** in **Rule Name**, **Opportunity** in **Table Name**, **Y** in **Rule Enabled**.
3. Click **Filter**.

## Quick quotes and orders

You can now quickly generate a quote or order using a new default template merged with existing record details. You can print the quote or order or email it to a contact directly from Sage CRM.

## Generating a quick quote or order

You can create a quick quote or order in the context of an opportunity or a company, or from your My CRM area.

1. Click **New | New Quote** or **New | New Order**.
2. Alternatively, open the opportunity record or the company record for which you want to create a quick quote or order. If workflow is enabled, you might have to progress the opportunity before you can create, print, or send a new quote or order based on the record.
3. Complete the fields on the New Quote screen or the New Order screen. You can link the quote or order to a company or person using the advanced search buttons.
4. Click **Next**.
5. To preview the quote or order in a new window, click **Print Quote** or **Print Order**. Use the PDF buttons to print or save the quote or order.
6. To save the quote or order without printing or emailing it, click **Continue**.

## Sending a quick quote or order

1. To send the quote or order as an attachment to an email, click **Send Quote** or **Send Order**. Complete the email address and subject fields.
2. To create a completed communication record with a link to the new quote or order, complete the **Communications Options** fields, making sure you specify a team and a follow up action. A communication record is associated with each person in the specified team.
3. To add information about the emailed quote or order to an existing marketing campaign, choose the relevant campaign activity from **Wave Activity**. To include a link to every recipient, click eMails in the Parent Category Selection panel.
4. Click **Send Quote** or **Send Order**.

## Merge to PDF and Merge to Word

There are two mail merge output options in Sage CRM 7.3.

- To perform a mail merge that creates a PDF document, click **Merge to PDF**.
- To perform a mail merge that creates Microsoft Word documents, click **Merge to Word**.

If your System Administrator has disabled the Merge to Word option at a system level, the **Merge to Word** button isn't displayed.

# MailChimp

MailChimp is an email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results. It's less complicated than the existing SwiftPage integration and comes with a free plan.

MailChimp campaigns let you send automated emails to groups of contacts straight from Sage CRM. You can build campaigns using predefined templates or create a new template from scratch. Once you've kicked off a MailChimp campaign, you can view how recipients have interacted with the campaign emails so you can follow up with appropriate actions.

## Integrating Sage CRM and MailChimp

As a System Administrator, you must integrate Sage CRM and MailChimp, and then configure users' settings so they can create and send MailChimp campaigns.

1. Click **Administration | Email and Documents | MailChimp Integration**.
2. Click **Change**.
3. To create a MailChimp account, browse to <https://login.mailchimp.com/signup?> and complete the sign up steps.
4. Get the MailChimp API key and enter it in **MailChimp API Key**. Sage CRM uses this key to communicate with MailChimp. For more help, browse to <http://kb.mailchimp.com/accounts/management/about-api-keys>.
5. Get the MailChimp List ID and enter it in **MailChimp List ID**. Sage CRM uses this ID to send subscriber information to MailChimp. For more help, browse to <http://kb.mailchimp.com/lists/managing-subscribers/find-your-list-id#Finding-the-List-ID-on-the-list>.
6. Click **Save**. Sage CRM is integrated with MailChimp for your Sage CRM account.
7. To add users to your account, click **Administration | Users | Users** and open the user that you want to configure and click **Change**.
8. Choose **Yes** from **Enable MailChimp** and click **Save**.

## Creating contact groups for MailChimp campaigns

Before you set up a MailChimp campaign, you must first create a group of contacts that you want to send campaign emails to and upload the group to the existing MailChimp list. It's easy to add groups of contacts directly from Sage CRM to MailChimp.

1. Click **My CRM | Groups** and open a group of companies, people, or leads. Make any updates to this group that you might need.
2. Alternatively, create a new group.
3. The group must include an email column. If this column is missing, the **Send to MailChimp** button doesn't appear. In addition, each contact in the group must have a valid email address. If a contact doesn't have an email address, it won't be added to the MailChimp list.
4. Click **Send to MailChimp**.

## Creating MailChimp campaigns

In addition to creating a contact group and adding it to the existing MailChimp list, you must also be connected to the Internet and have logged on to your MailChimp account in order to create a MailChimp campaign.

1. Click **My CRM | MailChimp Campaigns** and click **New**.
2. Enter the campaign details: the campaign name in **Name**, the email address from which campaign emails are sent in **From Email Address**, the recipient's name that appears on campaign emails in **From Name**, the group to which campaign emails are sent in **Segment**.
3. Click **Create Campaign**.

MailChimp opens in a new browser window. If it doesn't open, ensure pop ups aren't blocked in your browser. Complete the following steps in MailChimp.

1. Check that your campaign details are correct and click **Next**.
2. Choose a template and add the image and content that you want to include. Click **Save and Close**.
3. Click **Next** and confirm that all elements in your template are correct.
  - If there's a problem click **Resolve** to fix it.
  - If you want to make a change to any element, click **Edit**.
4. Save, schedule or send your campaign.
  - To send the email straight way, click **Send** and **Send Now**.
  - To save the email and schedule a time to send it, click **Schedule**. Specify the delivery options and click **Schedule Campaign**.
  - To save the email and return to Sage CRM, click **Save and Exit** at the top of the screen. When you're ready to send it, open the campaign in Sage CRM and click **Send MailChimp Campaign**.

## Viewing MailChimp campaign results

Every hour, data from all campaigns is synchronized from MailChimp to Sage CRM so you can see updated statistics about recipient interaction with your campaign emails.

1. Click **My CRM | MailChimp Campaigns**.
2. Click a campaign hyperlink. Statistics about this campaign are displayed in the MailChimp Campaign Results panel.
3. To manually synchronize the data for this campaign, click **Refresh**.
4. Click a hyperlink to view more detailed information about any of these statistics. See the *User Guide* for an explanation of each statistic.
5. To create a contact group based on the recipients in a statistic group, click **Create New Group**. You can apply follow up actions to this group as appropriate to make your campaign even more targeted and relevant.
6. Every night, a communication record is created for each email recipient. Click the Communications tab for the relevant company, person, or lead record to view information about the MailChimp campaign email that they received. Click the hyperlink to open a copy of the campaign email.

# Mobile enhancements

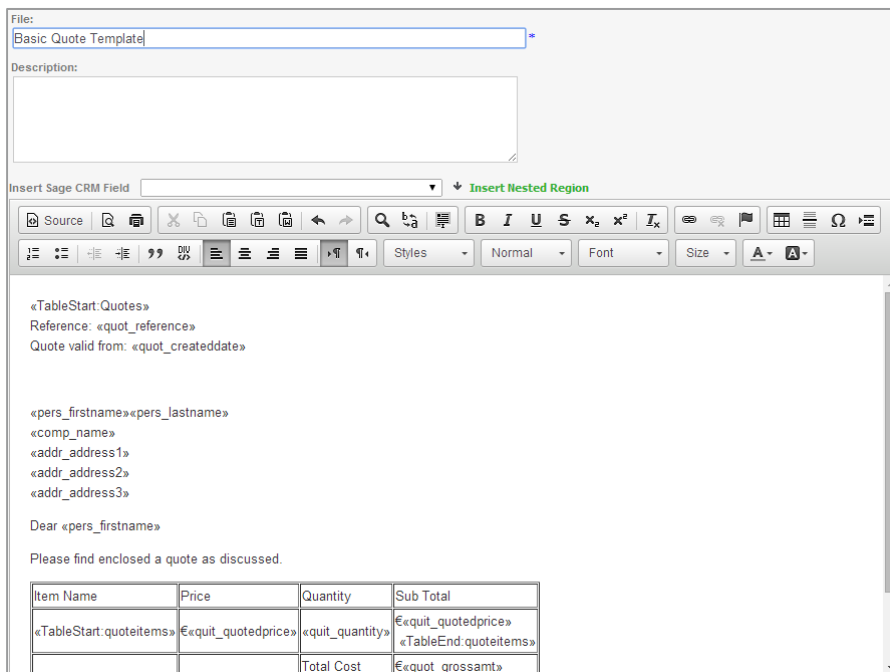
There are three main mobile enhancements in Sage CRM 7.3.

- The optimized mobile themes have been rolled into the **Sage CRM Mobile** theme that looks the same on an iPhone, Android smartphone, and tablet. The Sage CRM Classic Mobile theme is still supported for IE mobile devices and Blackberries.
- Sage CRM Sales Lite has been renamed as **Sage CRM for iPhone** and has an updated UI. It also has some new functionality; you can add new meetings or tasks through the app, and import an iPhone contact as a lead or a person into Sage CRM. Your System Administrator can create custom fields that appear in Sage CRM for iPhone.
- **Sage CRM for Android** lets you add new meetings or tasks through the app, and import an Android contact as a lead or a person into Sage CRM. Your System Administrator can create custom fields that appear in Sage CRM for Android.

For more information, see the *Mobile Guide*.

# Enhanced text editor

The Sage CRM text editor has been enhanced so it's easier for you to create the body of a mail merge or email template. You can maximize the editor to help you see your work more clearly, and your spelling is automatically checked as you type.



## Lead deduplication

When deduplication is enabled, Sage CRM searches for duplicate records on Lead entities using match rules of type "contains" on Lead Company Name and Lead Person Last Name.

### Enabling lead deduplication

As a System Administrator, you can specify that the lead dedupe rules look for matches on either or both Lead Company Name and Lead Person Last Name fields. Click **Administration | System | System Behavior** and choose **And** or **Or** from **Deduplication Rule**.

### Creating a new lead

Now when you create a new lead, Sage CRM searches for possible duplicate lead records. 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**.

For more information, see *Creating a new lead* in the *User Guide*.

### Uploading leads

When deduplication is enabled, you must set a deduplication rule for the Lead Company Name and Lead Person Last Name fields when you're uploading Lead data.

For more information, see *Setting field level dedupe* rules in the *User Guide*.



---

© Copyright 2014 Sage Technologies Limited, publisher of this work. All rights reserved.

No part of this documentation may be copied, photocopied, reproduced, translated, microfilmed, or otherwise duplicated on any medium without prior written consent of Sage Technologies Limited.

Use of the software programs described herein and this documentation is subject to the End User Licence Agreement enclosed in the software package, or accepted during system sign-up. Sage, and the Sage logo are registered trademarks or trademarks of The Sage Group PLC. All other marks are trademarks or registered trademarks of their respective owners.

**Document version code: RLP-USE-ENG-730-1.0**

---

## About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success

Accelerate your business success with a free 30-day trial at [www.sagecrm.com](http://www.sagecrm.com).

