Sage CRM

7.0 What's New Guide

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Chapter 1
Introduction

Who this guide is for

This guide is for Sage OpCos, Sage CRM partners, and Sage CRM customers who want to find out about the new features of Sage CRM 7.0.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

Summary of Features

The 7.0 features described in this guide include:

- Themes enhancements and new branding
- Interactive Dashboard
- Active Directory user import
- Mixed licensing
- SData Provider (Read-only)
- More features including:
  - System expiry licensing
  - License Key Update application
  - New in-product help format
  - CSV file delimiter setting
  - New supporting technology for the Interactive Dashboard feature

Chapter 2
Themes and Branding

The following new themes and branding functionality is available in version 7.0:

- Implementation of the new Sage branding in the install shield wizard and logon screen.
- An updated "look and feel" of colors, icons, tabs, and more inside CRM, in line with the new branding.
- New standard themes.
- Easier-to-edit CSS file.

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

To view the new themes and branding you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales Manager

This user does not require a password.

To create a new theme you can log onto CRM as:

Name	User Name	Profile
System Administrator	Admin	Administrator

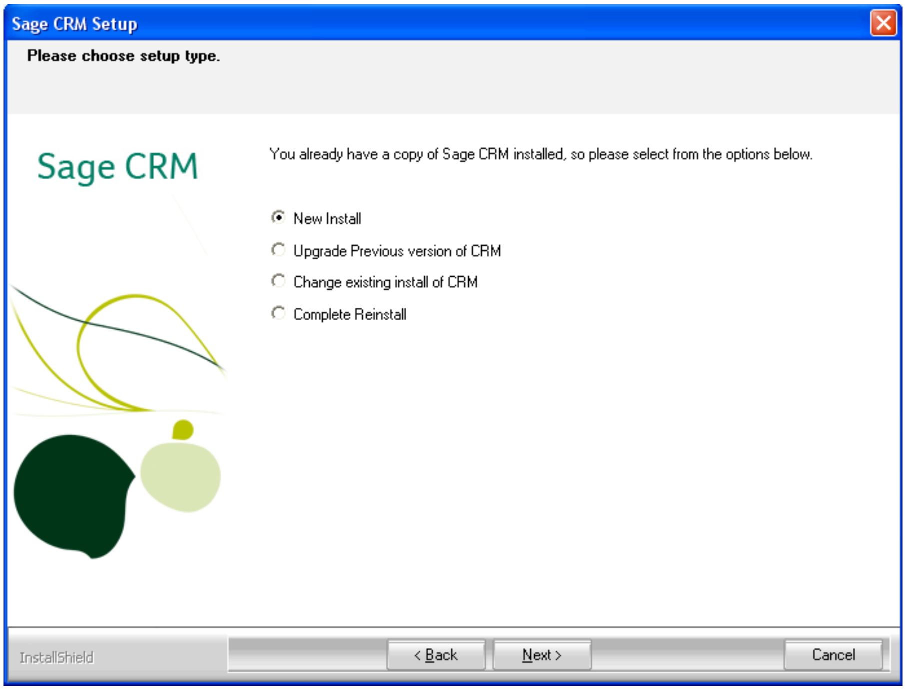
This user does not require a password.

Note: You need access to the CRM server to work in the wwwroot\themes folder.

Has the Sage branding been implemented in the install shield wizard?

Yes. The install shield and logon page have changed to follow the new branding guidelines.

To view the new install shield:

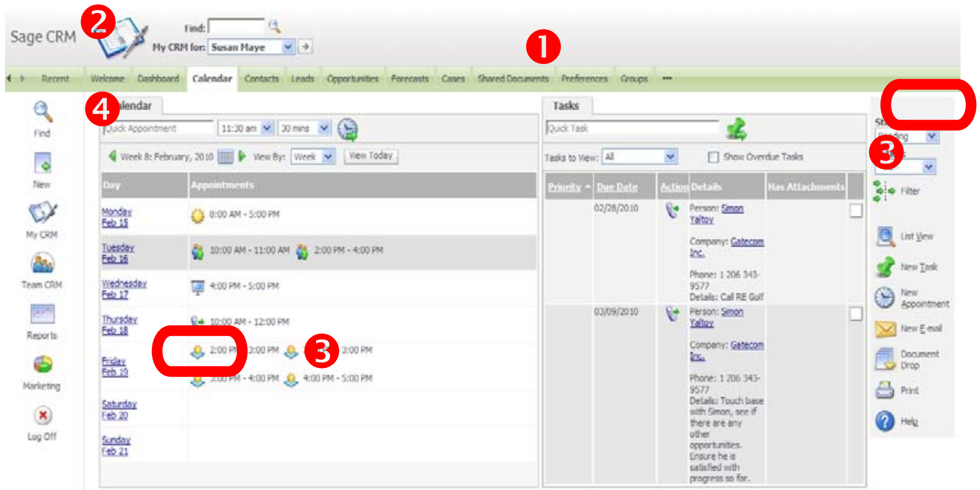


1. Click on SETUP.EXE in your install directory or CD.
2. Select Install Sage CRM, and follow the steps in the install shield.
3. The new branding is displayed throughout the install process.

A new “look and feel”. How has that been achieved?

The new Sage branding has been applied in Sage CRM, with a fresher “look and feel” throughout the interface.

Areas you’ll notice right away include:



❶ Overall color scheme.

Note: The original blue theme (now called “Classic”), and two new themes are available from My CRM | Preferences. See next sections.

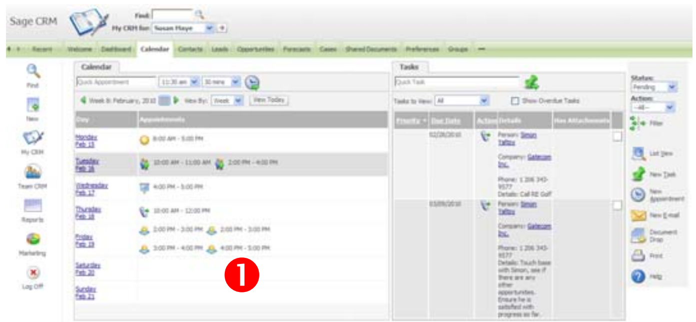
❷ Top left logo.

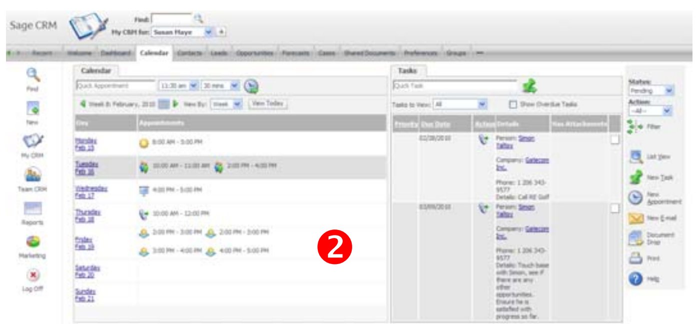
❸ Updated icons.

❹ Updated Recent list and Main Menu / Administration menu toggle buttons.

What new themes are supplied with this release?

Two new themes have been added:





❶ Sage theme. This is the default theme, characterized by green textured tabs.

❷ Neutral theme. Silver textured tabs.

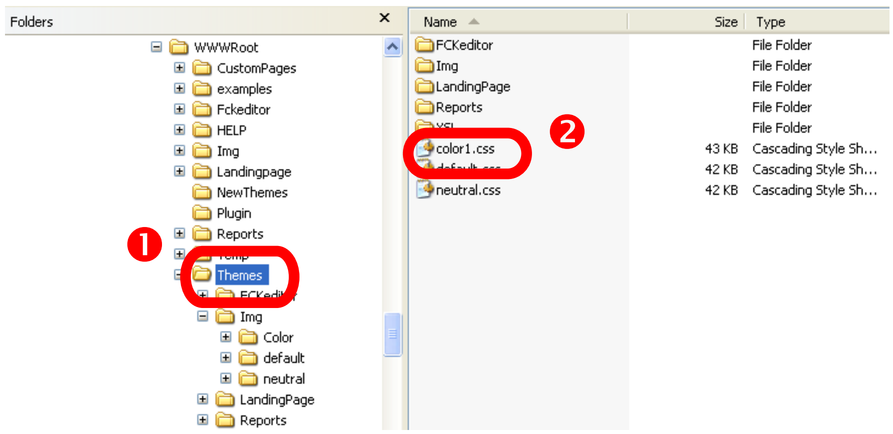
Note: The “Sage Green” theme has been retired from this version. The blue theme is still available as “Classic”. The new themes are supported in IE7 and above. IE6 users must use the blue “Classic” theme. Any users who were using Sage Green as their preferred theme will get migrated to the new Sage theme on upgrade.

Can I still add new themes?

Yes. The procedure is still basically the same, however the stylesheet used in the Sage theme (COLOR1.CSS) has been simplified, so you should find it easier. A key improvement is that Sage CRM tabs are now driven by CSS classes. Previously, the screen tabs were generated using graphics.

These improvements mean a lower graphic design overhead for creating a new theme.

To add a new theme:



❶ Navigate to the wwwroot\themes folder of your CRM install.

❷ Copy an existing theme to base your new theme on. For example, copy COLOR1.CSS and rename to **MyNewTheme.CSS**.

Follow the rest of the steps described in the Themes chapter of the *System Administrator Guide* to complete the setup of a new theme.

Where can I get more information?

More information on this feature is available in the:

- *System Administrator Guide*

Chapter 3
Interactive Dashboard

The following new functionality is available in version 7.0:

- Create a work area tailored to your daily tasks and style of working.
- Access many applications from a common interface, including RSS and SData feeds.
- Customize available content, and content layout to suit your workspace – without leaving the interactive dashboard.
- Use drag-and-drop to organize your content and workspace.

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

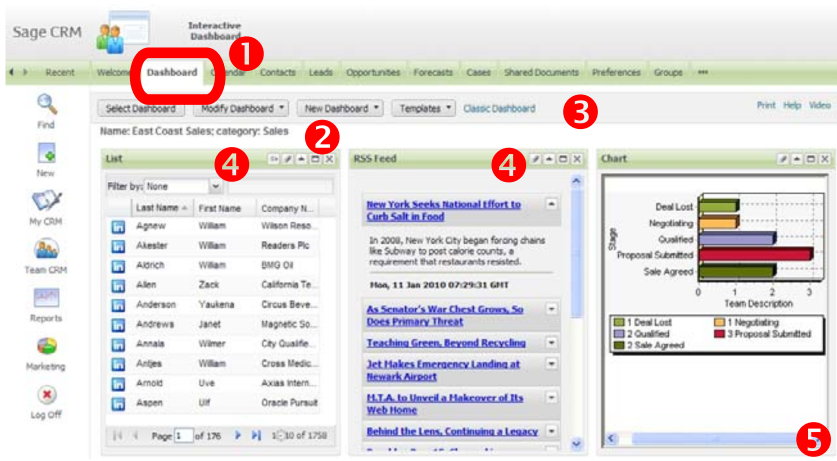
To work with this feature you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales Manager

This user does not require a password.

Note: A user must have Info Manager or System Administrator rights to create dashboard templates, library gadgets, and assign dashboards to users. Susan Maye is an Info Manager.

Take me through the interactive dashboard basics!



❶ **Dashboard tab**. Select this tab to access the dashboard.

The first time you log on to CRM after install or upgrade and access the Dashboard tab, a Dashboard Welcome page is displayed. You can view a video, access help, and select the Interactive or Classic Dashboard as your default dashboard.

❷ **Status bar**. Displays the name and category of the dashboard, and shows if you are working with a personal, assigned, or template dashboard.

❸ **Control bar**. Holds the buttons and sub-menus to select and build dashboards and gadgets. You can also access help and return to the Classic Dashboard from the control bar.

Select Dashboard. Choose from a list of personal dashboards (ones you have created, chosen, or been assigned).

Modify Dashboard. Change the dashboard details, add library or new gadgets to the dashboard, and delete a dashboard from your workspace.

New Dashboard. Create or clone new dashboards for personal use.

Templates. Info Manager/Admin users only. Manage template and user dashboards, assign dashboards to users and teams, and add gadgets to the gadget library.

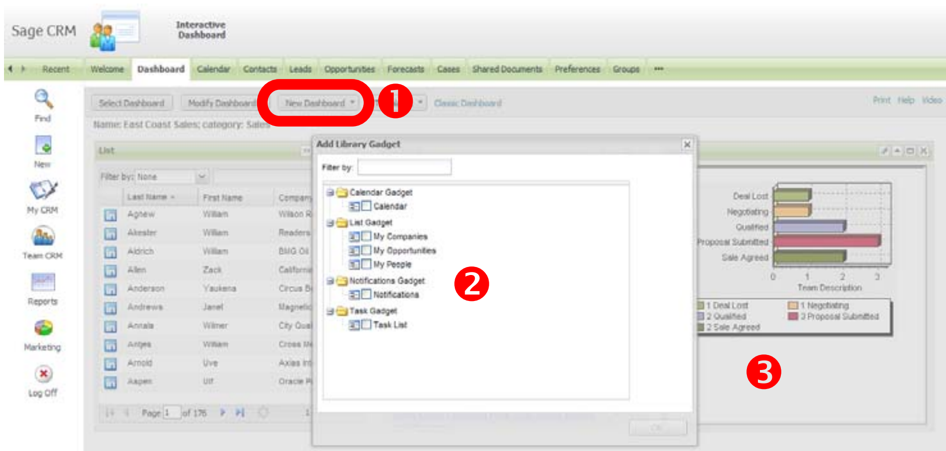
❹ **Gadget**. Gadgets feed information from multiple data sources, internal and external to CRM, into your workspace. They are also platforms to carry out tasks and actions from, such as logging a new case or progressing a sales opportunity through a workflow.

❺ **Workspace**. Displays gadgets. Gadgets and columns within gadgets can be dragged and dropped - all to create the best workspace for you.

How do I get all my East Coast sales data on one page?

Set up a new dashboard!

To set up a new dashboard and add gadgets to it:



❶ Select My CRM | Dashboard | New Dashboard. For example:

Name: **East Coast Sales**
Description: **Prospects, Customers, and Sales Activities for US East Coast**
Category: **Sales** (type in to create a new category, or select from the drop-down list)

❷ Select the check box next to the library gadgets you want to display and click OK.

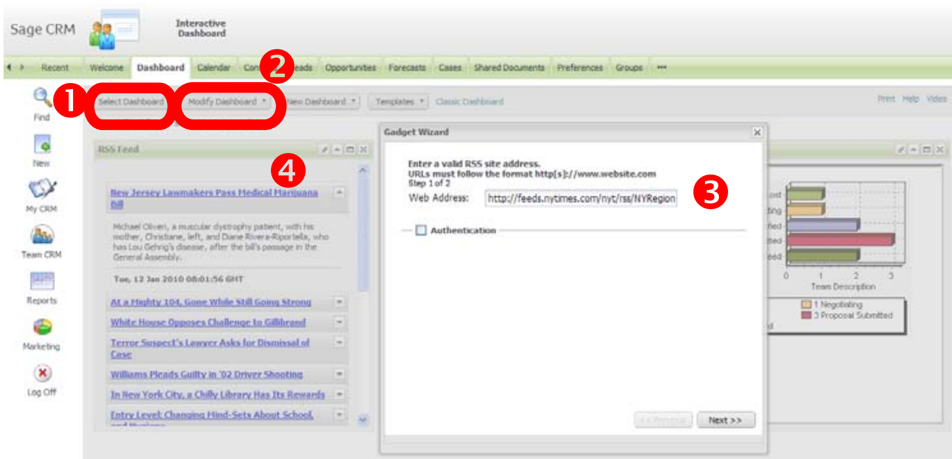
You can also select Modify Dashboard | Add New Gadget to create your own gadgets.

❸ The gadgets are displayed on your dashboard. You can use drag-and-drop to move columns within gadgets, and to switch entire gadgets around.

How do I add a local news feed to my regional sales page?

Use the gadget wizard to create a new RSS feed.

To add an RSS feed to your dashboard:



❶ Select the dashboard you want to add the feed to, for example, East Coast Sales.

❷ Click Modify Dashboard | Add New Gadget | RSS Feed.

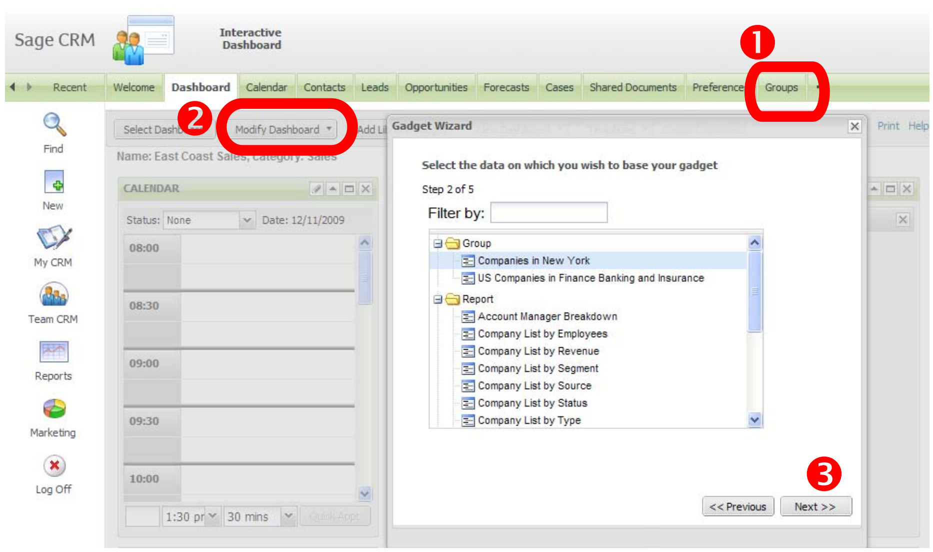
❸ Type or paste the full feed name into the Web Address field and complete the wizard steps.

❹ The RSS feed is displayed on your dashboard.

How do I access my New York-based customers?

If you are missing content that you want to see on your dashboard, you can create a new data source (Group, Report, Saved Search, or Advanced Saved Search). Once you have created the new data source, for example all your customers based in New York, it can then be accessed from the gadget wizard.

To create a new group data source:



1. Go to the area in CRM where you can set up your new data source, for example, My CRM | Groups. Set up a new group for the data you want to access from your dashboard.

2. Select My CRM | Dashboard | Modify Dashboard | Add New Gadget and follow the steps in the Gadget Wizard, for example, List | Company | Group | Companies in New York.

3. Click Next, and complete the steps in the wizard. These include defining the number of rows you want displayed on each page, and a full or subset of columns from your original data source.

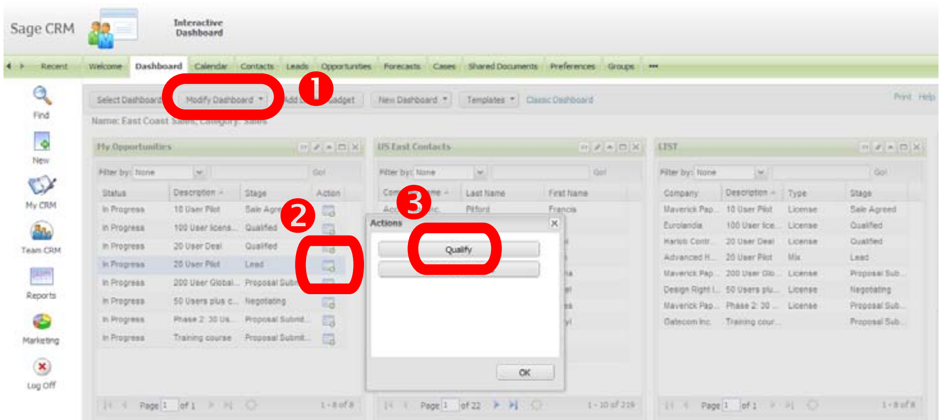
   When you have completed the wizard steps, the new gadget is displayed on the dashboard.

How do I qualify an opportunity?

As well as viewing information, you can carry out daily tasks from the dashboard. These include progressing records through workflow, drilling down on information displayed in charts and lists, and all the usual actions available from the menu buttons.

Note: If you are working with demo data opportunities, they may not have any workflow actions associated with them. Just create one or two opportunities first if you don't already have any, then you can try this scenario out.

To progress an opportunity from the dashboard:



❶ Select Modify Dashboard | Add New Gadget | List, and add a list which has records associated with workflow. For example, a saved search of opportunities, My Opportunities In Progress.

In Step 4 of the wizard, make sure you select the Display Workflow Anchor Column check box.

❷ Once the gadget is on your dashboard, single-click the Action icon next to one of the opportunities.

The workflow actions for the current state of the opportunity are displayed.

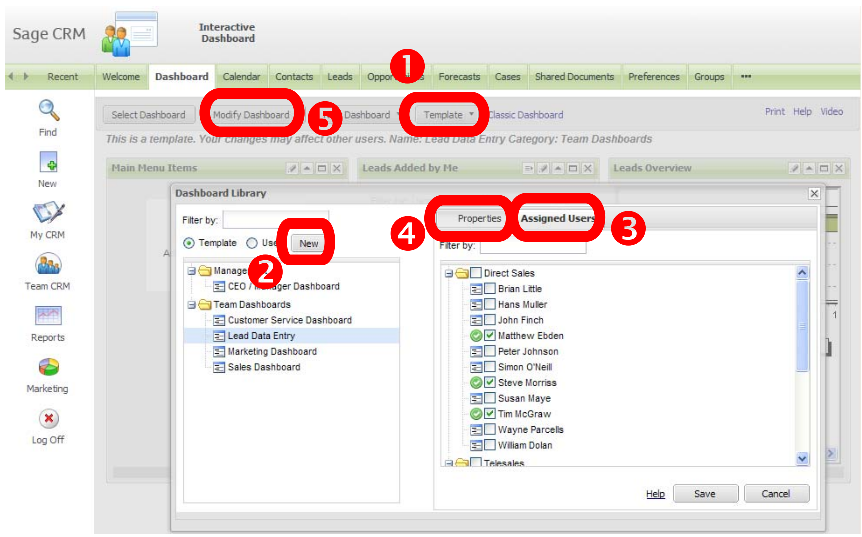
❸ Select the workflow action, for example, Qualify, and click OK.

The Opportunity Progress page is displayed. When the details are saved, you are returned to the dashboard.

Can I set up a simple dashboard for data entry contractors?

Yes. As an Info Manager or System Administrator you can set up a dashboard with specific task access, and you can assign the dashboard to individual users or teams.

To set up a new dashboard template and assign it to a user:



1. Select Templates | Dashboard Library.

2. Make sure the Template radio button is selected, and click on New. Enter the template name and category in the Properties tab, for example, **Lead Data Entry**, and click Save.

3. Select the Assigned Users tab. Click the Assign button to populate the list with all teams and users. Click the check box next to the users or teams you want the dashboard to be available for, and click Save.

4. Go back to the Properties tab, make sure the template is highlighted, and select the Modify Gadgets button. A message is displayed “This is a template, your changes can affect other users”.

5. Select Modify Dashboard | Add New Gadget to add the gadgets to the template dashboard.

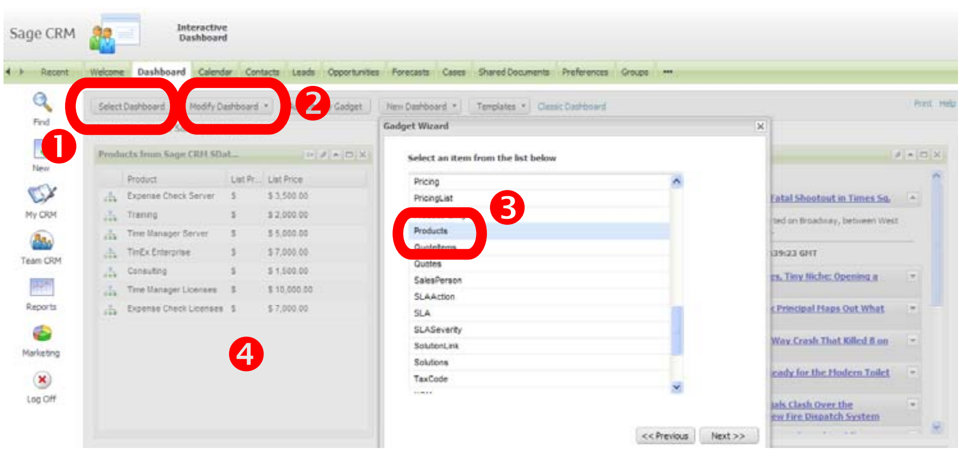
   Example content for this type of page could include Menu Item | New Lead, and a list and a chart to show the leads the user has added so far.

   Log off and back on again as the user you assigned the dashboard to, and review the dashboard. **Note**: You can combine a basic dashboard with existing security features to control access to other areas of CRM.

Can I access pricing information?

Yes. If the pricing information is available within CRM, you can use an SData (Sage Data) Feed on the Products entity to display this. If the pricing information is held in another system which conforms to the SData standard, then a URL which returns pricing information from the external system can be typed into the Web Address of the SData Feed.

To add content which shows pricing information via an SData feed on the dashboard:



1 Select the dashboard you want to add the feed to, for example, East Coast Sales.

2 Click Modify Dashboard | Add Gadget | SData Feed. Select the CRM SData Provider check box, and click on Next.

3 Select Products from the list of entities and complete the remaining wizard steps.

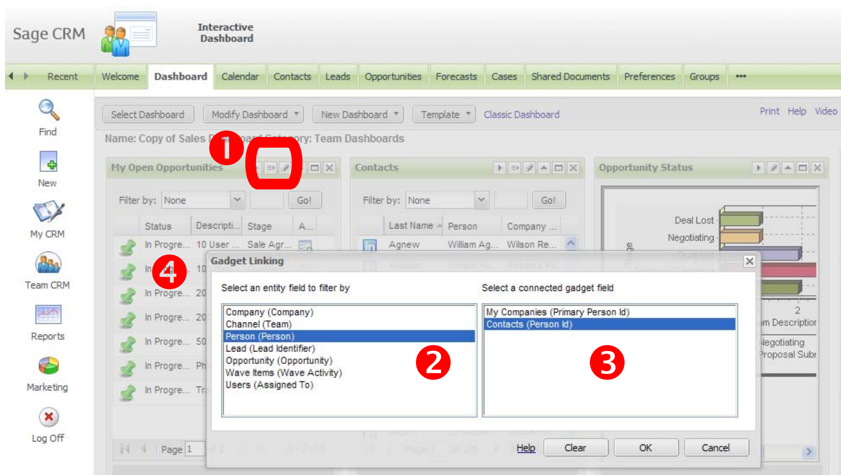
4 The product and pricing information is displayed on the dashboard.

Can I link gadgets to each other?

Yes. List and Record Summary gadgets can be linked to dynamically display a filtered view on one gadget based on scrolling through another gadget. For example, a list of contacts and a list of opportunities could be linked so that only opportunities linked to the highlighted person are displayed.

You can also link SData gadgets to each other, and Task List gadgets to List and Record Summary gadgets.

To link gadgets:



1 Make sure you have at least two gadgets on your dashboard with related data in them. For example, a list of opportunities and a list of people.

Select the Links icon from the gadget where you want the filtered view, for example, My Open Opportunities.

2 From the Select An Entity Field To Filter By list, select the entity that you want to filter by, for example, Person.

3 From the Select A Connected Gadget Field list, select the gadget where you want to scroll from, for example, Contacts.

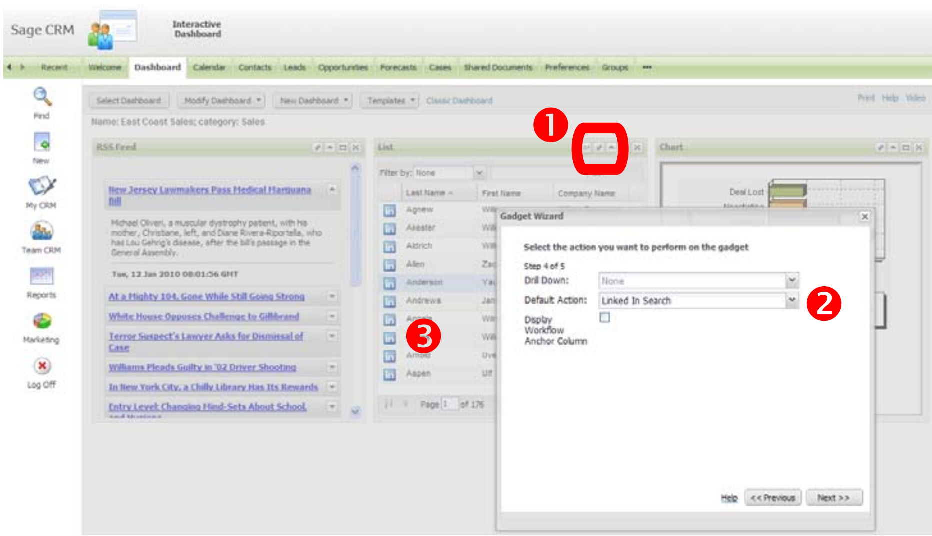
Click OK.

4 The My Opportunities list changes as you scroll through the Contacts list.

Can I access LinkedIn profile information?

Yes. You can add a LinkedIn Search action to List gadgets. You need to have a LinkedIn account. You'll be prompted for logon details the first time you access LinkedIn from the Dashboard.

To access LinkedIn profile information:



❶ Edit an existing List gadget by clicking on the pencil icon in the gadget header.

❷ In Step 4 of the wizard, set the Default Action to LinkedIn Search.

❸ The LinkedIn icon is displayed next to each record in the List gadget. Click on the icon to launch the LinkedIn search.

Where can I get more information?

More information on this feature is available in the:

- *User Guide*

Chapter 4
Active Directory User Import

The following new functionality is available in version 7.0:

- Carry out a batch import of users managed in Active Directory.
- View log files from the user import.
- Repeat an import as user details get updated.

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

To work with the Import Users feature you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

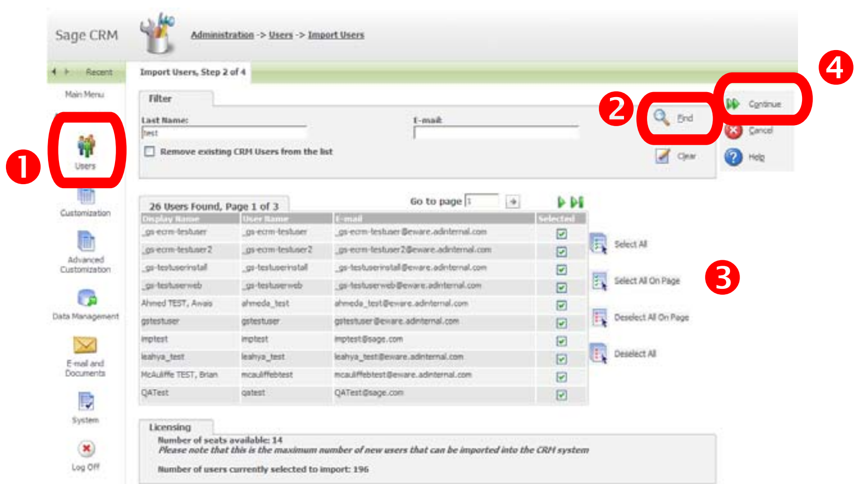
This user does not require a password.

Is there a fast way to get my users imported into CRM?

If you've already got a Windows network in place, you can use the Import Users feature in CRM to quickly set up a batch of users.

Note: It is recommended that you have completed Security Profile and User Template setup in CRM before carrying out an import. This will allow you to assign a template to users during import and save even more time!

To import users from Active Directory:



❶ Select Administration | Users | Import Users. Enter the Active Directory Parameters, and click Connect. Select the required branch of the populated Active Directory Tree, for example, Users. Click Continue.

❷ Use the Find button to narrow the list of users. Toggle the Remove Existing CRM Users From The List check box to exclude or update existing CRM user details during the import (based on Logon ID).

❸ Use the Select and Clear action buttons to choose the users for import.

The Licensing panel displays the number of remaining licenses available to add to CRM. In the case of a mixed license implementation, you can select between Named and Concurrent for users of any one import.

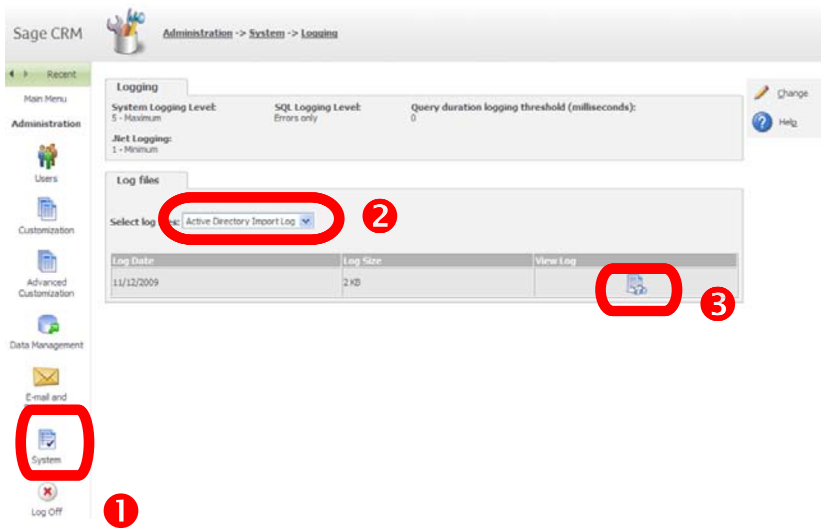
❹ Click Continue.

Select the Password, Template, and E-mail options in Step 3 of the wizard, and click Continue. The users are imported and a log file is generated.

How can I track the success of the import?

From the log file which is generated during the import.

To access the log file:



❶ Click Administration | System | Logging.

❷ Select Active Directory Import Log.

❸ Click on the View Log icon. The log is displayed in a new browser window.

The log can also be accessed on completion of the import, and in the CRM logs folder (..\Program Files\Sage\CRM\[*install name*]\Logs).

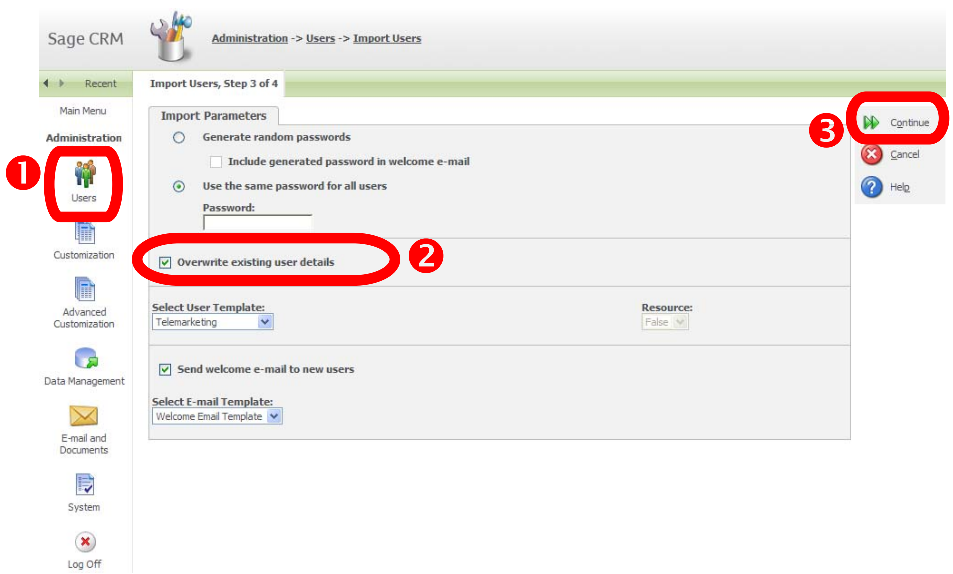
The following mapping is used during the import:

sAMAccountName → User Name
SN → Last Name
givenName → First Name
mail → Email

I've changed user details in Active Directory. Can I re-import?

You can repeat an import to update details which have changed on the Active Directory side.

To re-import existing users:



❶ Select Administration | Users | Import Users, and complete steps 1 and 2 of the wizard. Make sure you uncheck the Remove Existing CRM Users From The List check box in step 2.

❷ Select the Overwrite Existing User Details check box.

❸ Click Continue.

The import is repeated, and the updated details are overwritten in CRM.

Where can I get more information?

More information on this feature is available in the:

- *System Administrator Guide*

Chapter 5
Mixed Licensing

The following new functionality is available in version 7.0:

- Mix named and concurrent user license types within a single installation.
- Add Solo users to an install with concurrent licensing.
- Change an existing install from named to concurrent and vice versa.

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

To administer users in a mixed license environment you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

This user does not require a password.

To work with the mixed licensing feature, the license key must include concurrent licensing (or the “logged on users license scheme”).

Note: This feature is only available in regions where concurrent licensing is sold.

I've got a small full-time team and the rest work part-time shifts, how do I set this up?

You can use mixed licensing to get the most economical setup to suit your business requirements. For example, for:

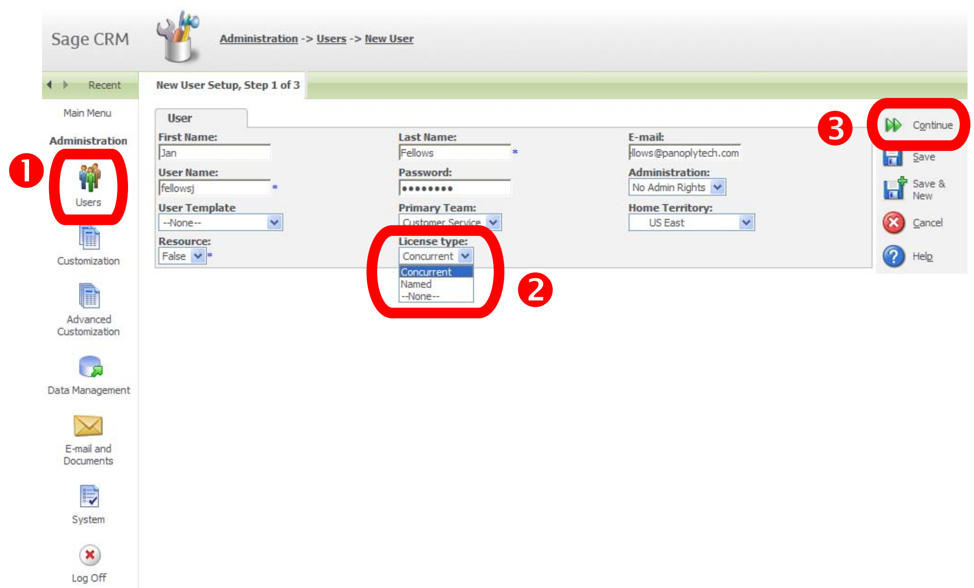
– 5 full-time staff

– 12 part-time shift workers (where a maximum of 4 are logged on at any one time)

– 1 System Administrator

you would require a minimum of 10 concurrent licenses, within which you set your full-time staff and your System Administrator to named users and the 12 part-time staff to concurrent users.

To set up a new user in a concurrent license system:



1 Select Administration | Users | New User.

2 Enter the user details, and set the License Type field to either Concurrent or Named.

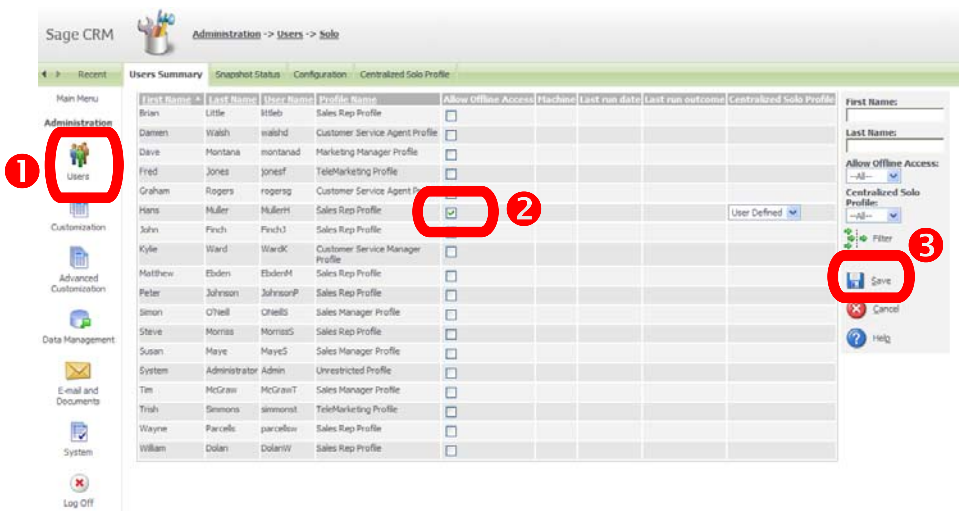
3 Click Continue to complete the user setup steps.

You can also set the License Type on a User Template, and assign the template to a new user.

One of the full-timers is a mobile sales rep. What license type should they be?

If your sales rep is using Solo, CRM's disconnected mobile solution, they can be set up within a concurrent license system, however they must exist as a named user.

To enable a user for Solo within a concurrent license system:



❶ Select Administration | Users. Make sure your Solo user's license type is set to Named.

Select Administration | Users | Solo. A list of all named users is displayed. Click on the Change button.

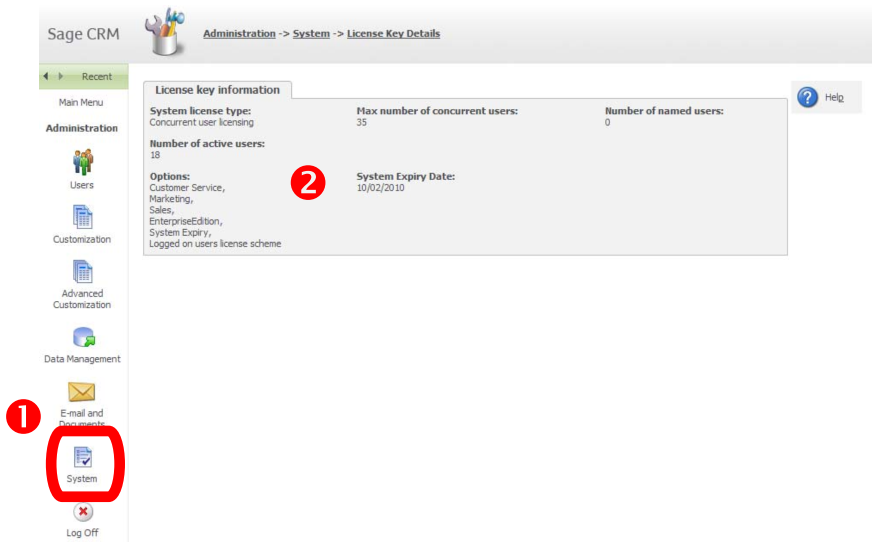
❷ Select the Allow Offline Access check box next to the user.

❸ Select Save.

How do I know I'm reaching the maximum number of users?

If users are experiencing problems logging on, you may be reaching the maximum number of users.

To check existing licensing information:



1 Select Administration | System | License Key Details.

2 Review the License Key Information panel.

If the Number Of Active Users (any user not set to Disabled, Deleted, or Resource) is the same or close to the Max Number Of Concurrent Users, then users working with a Concurrent License Type may experience problems logging on if too many users are logging on at the same time.

Contact your Business Partner about increasing the number of licenses.

Note: From 7.0 onwards you can change the licensing on an existing concurrent install to a named install and vice versa.

Where can I get more information?

More information on this feature is available in the:

- *System Administrator Guide*

Chapter 6
SData Provider (Read-only)

The following new functionality is available in version 7.0:

- Make data from CRM entities available using the SData standard to share with third-party applications in a read-only format.
- Automatic update of the SData XSD schema as your CRM application is extended.
- Display SData feeds within CRM.

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

To add an SData feed to the interactive dashboard you can log on as:

Name	User Name	Profile
Susan Maye	MayeS	Sales Manager

This user does not require a password.

To work with SData in the Adminstration area of CRM you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

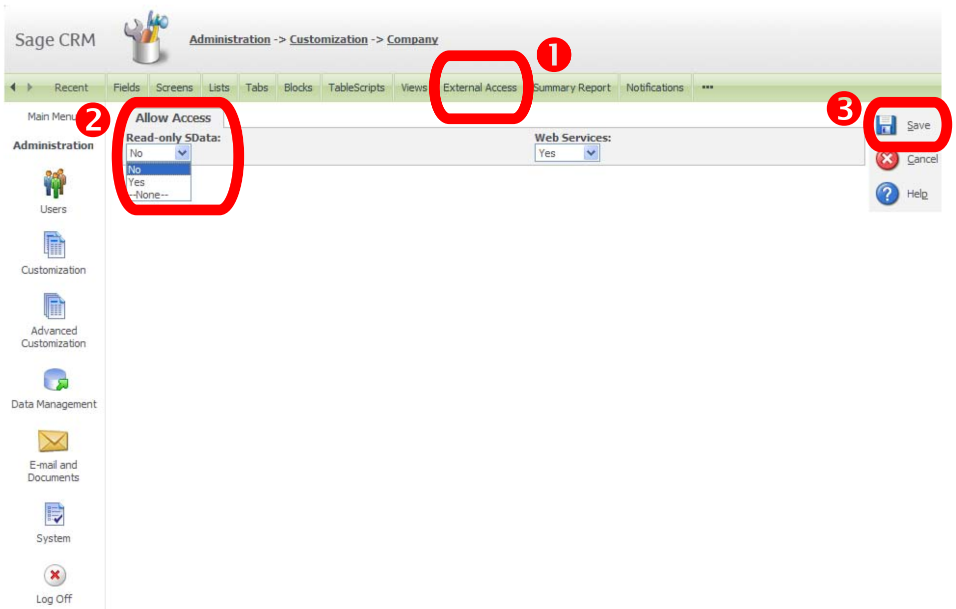
This user does not require a password.

Note: You require an Extensibility Module (EM) license to add a new table, and to work with the Advanced Customization Wizard.

Which entities are exposed using the SData standard?

All primary and secondary entities can be exposed for SData access. Primary entities are enabled by default. Custom entities, external tables and user views can also be enabled for SData access (see next sections).

To change the SData access for an entity:



❶ Select Administration | Customization | <Entity> | External Access and click on the Change button.

❷ Set the Read-only SData field to Yes or No.

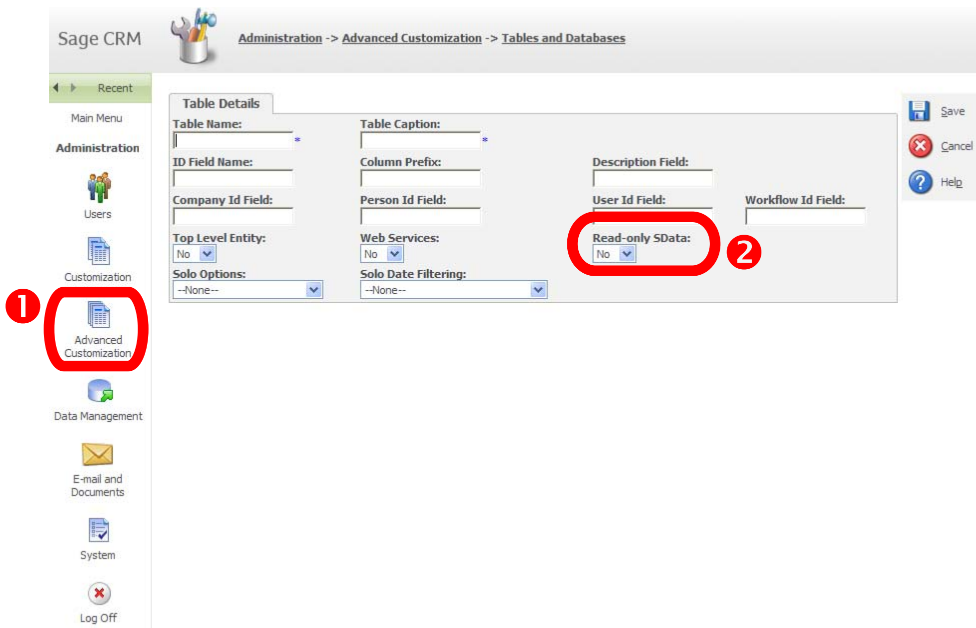
❸ Click Save.

Note: The Enable Web Services field in Administration | System | Web Services overrides the Web Services setting on the External Access tab.

Can a custom table be exposed for SData access?

Yes. There is an SData setting on the Table Details panel when you create a new custom table. This setting defaults to No.

To enable a custom table for SData access:



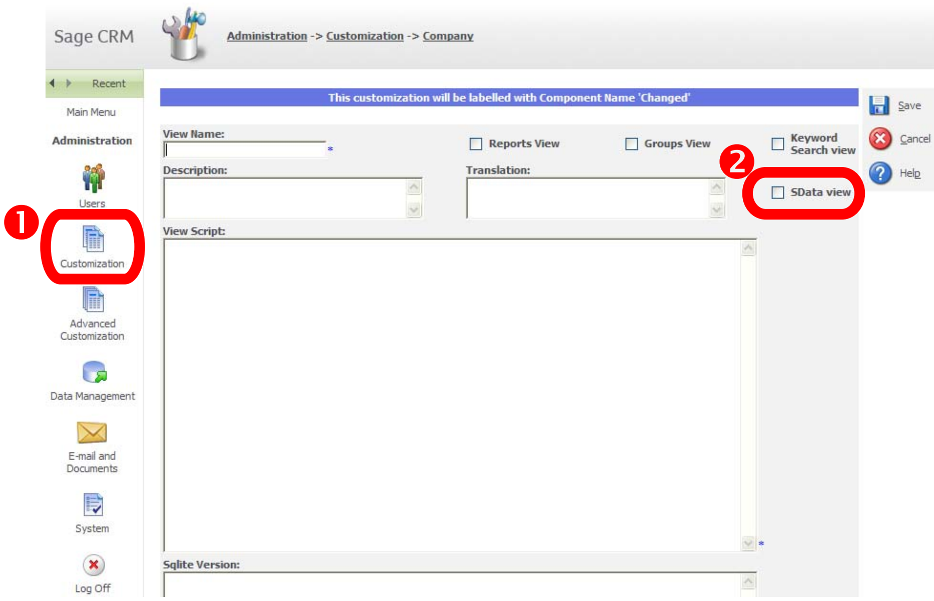
❶ Select Administration | Advanced Customization | Tables And Databases | Create Table.

❷ Set the Read-only SData field to Yes.

How do I enable a view for SData access?

User views (views created by you) can be enabled for SData access.

To enable a view for SData access:



1 Select Administration | Customization | [Entity] | Views.

Select an existing view or create a new one.

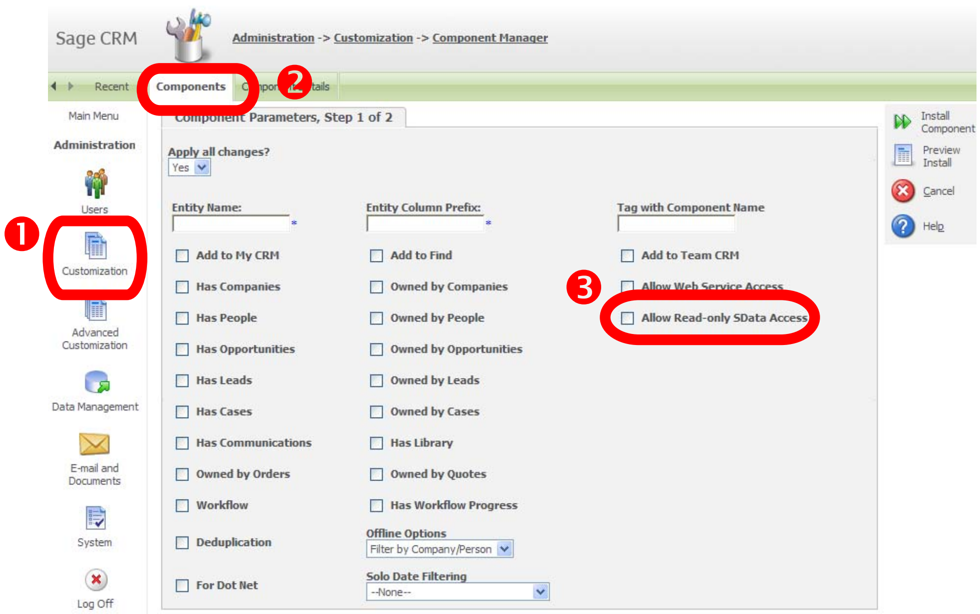
2 Select the SData View check box, and Save.

Note: Disabling an entity for SData access does not override views exposed for SData access.

Can SData access be enabled in the Advanced Customization Wizard?

Yes. There is an option to enable SData access when you install the Advanced Customization Wizard via the Component Manager.

To select SData access during the Advanced Customization Wizard steps:



❶ Make sure the 7.0 Advanced Customization Wizard ZIP is in the INF directory of your CRM install.

Select Administration | Customization | Component Manager. Browse to the INF directory of your install and upload the Advanced Customization Wizard zip file.

Click on the component, and select Install Component.

❷ Select the Allow Read-only SData Access check box on the Component Parameters page.

Where can I get more information?

More information on this feature is available in the:

- *System Administrator Guide*
- *Developer Guide*

Chapter 7
More Features

In this chapter you will learn about:

- System expiry licensing.
- License Key Update application.
- New help format.
- CSV file delimiter setting.
- New supporting technology for the Interactive Dashboard feature

This chapter takes you through a brief snapshot of how you can work with these features.

Who can I log on as?

To view the System Expiry Licensing settings and change a user's language you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

For all other scenarios described in this chapter you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales Manager

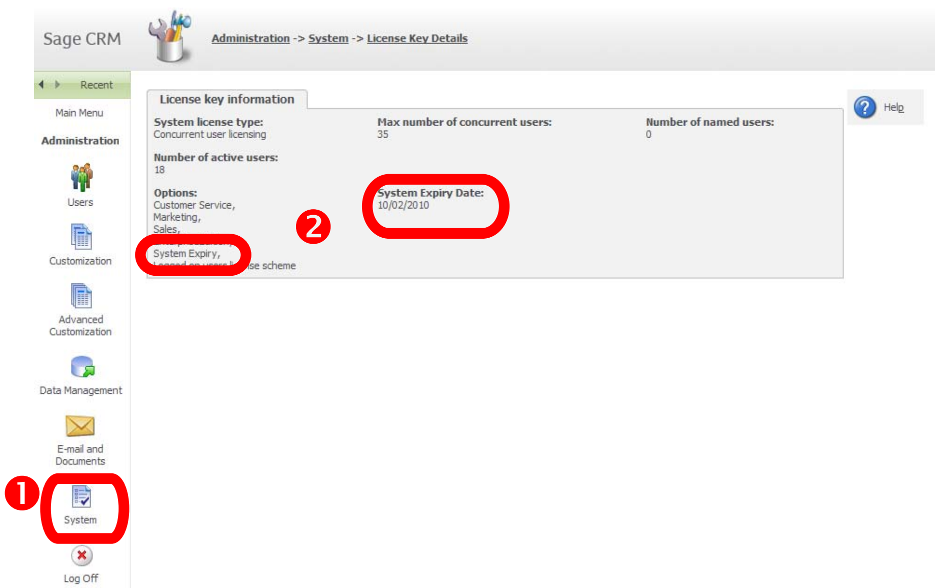
This user does not require a password.

Note: You need access to the CRM server (or install files) to run the License Key Update application. You need access to the CRM server to reset Apache Tomcat.

My system has a set expiry date. How can I check when that is?

A specific date can be set for your system license to expire. This can be done for full and trial keys of Sage CRM. Thirty days before the expiry date, the System Administrator receives a pop-up warning in CRM. The expiry date can also be checked any time from within the system.

To check the expiry date:



❶ Select Administration | System | License Key Details.

❷ The System Expires licensing option and the Expiry Date are displayed on the License Key Information panel.

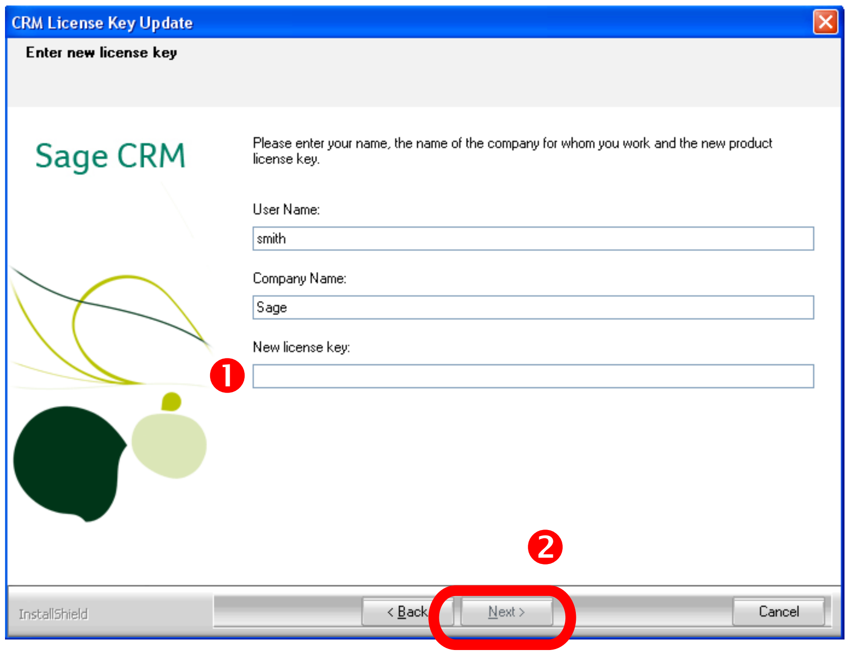
The System Administrator can change the warning setting so that all users, or Info Managers (and System Administrators), or only System Administrators see the expiry warning message from Administration | System | System Behavior.

Can I change the license key outside of the install wizard?

Yes. A license key update application is available in:

..\Program Files\Sage\CRM\[*install name*]\License Update

To run the license key update application:



❶ Navigate to your install location, and select the License Update folder:

..\Program Files\Sage\CRM\[*install name*]\License Update

Launch LICENSEKEYUPDATE.EXE

Enter the new license key.

❷ Click Next and complete the wizard steps.

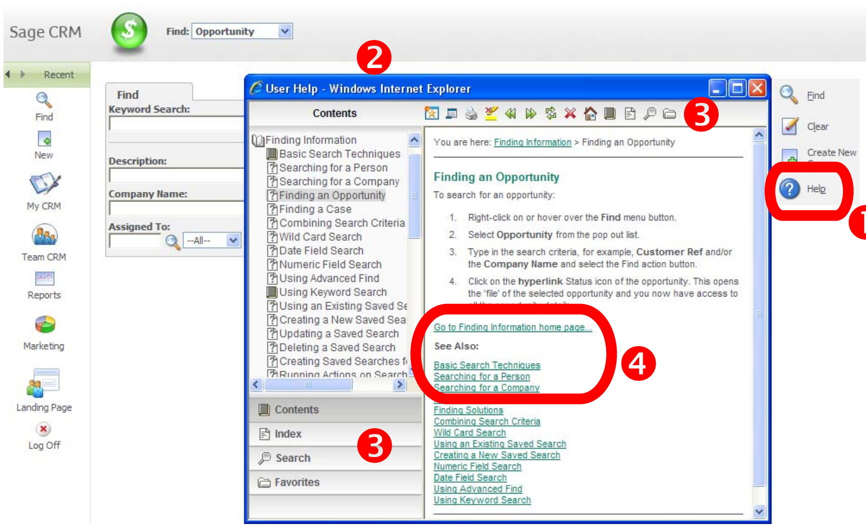
The License Key Update application is also available with the install files in:

..\Sage\CRM\Utils\EN\License Update

In-product help looks different – take me through the changes!

The in-product help has a new look-and-feel.

To access the in-product help:



❶ Click on the Help button from anywhere within the Main Menu or Administration areas.

❷ Help is displayed in a new browser window, relevant to your current location in the system (context-sensitive). If no context-sensitive link is available, the help file displays the full table of contents.

❸ Contents, Index, Search, and Favorites are available from either the concertina-style navigation pane or from the help toolbar.

❹ “Go to..” and “See Also” links are available from the help topic.

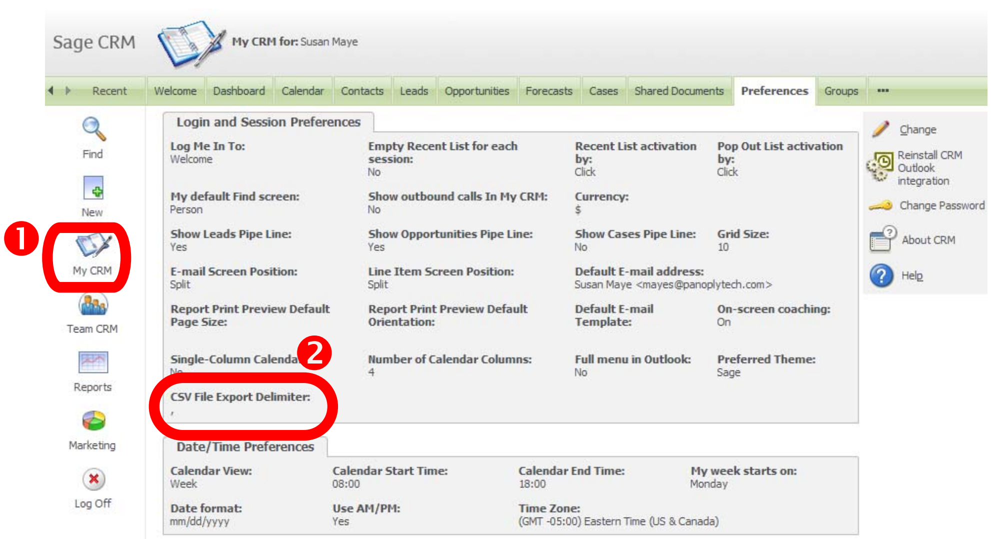
Other changes to note:

- The help file structure on the CRM server has changed. Custom help pages you have created are preserved on upgrade, however you will need to move them after upgrade to the new location (either ..\WWWRoot\HELP\EN\Main Menu\Content\User or ..\WWWRoot\HELP\EN\Administration\Content\Administrator) and redo any context-sensitive links to these files.
- The look-and-feel has been updated to reflect the new default theme, however help is not affected by changes to themes.

Can I set the CSV export to use a semi-colon instead of a comma as a delimiter?

Yes. You can use the CSV File Export Delimiter setting to set the delimiter as comma, semi-colon, or tab. When you use the Export To File button on, for example, the results of a company search, the CSV export will use the delimiter you have set. This makes for easier conversion to suit your native version of MS Excel.

To change the CSV file delimiter setting:



❶ Select My CRM | Preferences.

❷ Change the CSV File Export Delimiter field and Save.

The default option can be set in Administration | System | System Behavior. The user preference overrides the Administration selection.

Note: If the export puts your data into a single column, open the file in Excel and select Data | Text To Columns. Leave Delimited as the selected option and follow the rest of the steps in the wizard.

What is the supporting technology behind the Interactive Dashboard?

The Interactive Dashboard is a highly customizable interface area based on an iGoogle-like Web 2.0 experience. It includes Open standards-based components delivering enhanced user interface customization capability to the product.

The new user interface framework is entirely data driven by way of XML layout and data that is delivered to the user's browser using AJAX technology and the Google Web Toolkit (GWT). It will allow the user to create a single consolidated workspace containing CRM, ERP and any third-party feed-based information.

The new Interactive Dashboard and the introduction of support for Sage SData has required a new set of supporting technologies. These include:

- Google Web Tool Kit
- Apache Tomcat
- The Spring Framework
- Hibernate

The Apache Tomcat Service installed with CRM 7.0 to support the Interactive Dashboard is typically installed here:

..\Program Files\Sage\CRM\[*Install Name*]\tomcat\bin

The service name is *[install name]*Tomcat6. For example, **CRMTomcat6**. The display name is Apache Tomcat *[install name]*Tomcat6.

If you working with Sage CRM 7.0 and you experience a problem that requires a web server reset you may need to reset both IIS and Apache Tomcat.

To Reset Tomcat:

1. Open a cmd prompt and type

   net stop *[install name]***tomcat6**

2. Then type

   net start *[install name]***tomcat6**

Where can I get more information?

More information on these features is available in the:

- *User Guide*
- *System Administrator Guide*