

# SageCRM for Sage Accpac Extended Enterprise Suite

## What's New in SageCRM v6.2

### Overview

SageCRM version 6.2 delivers a comprehensive range of new capabilities and enhancements that are designed to enrich the SageCRM user and ownership experience significantly. Users can now change the look and feel of their SageCRM installation through the use of the product's new Branding Toolkit capabilities. A number of preconfigured themes are supplied out-of-the-box with version 6.2 and can be customized by administrators. Entirely new themes can also be created from scratch. A more powerful and flexible Relationship Manager is now available which allows users to set up many-to-many relationships among primary entities, as well as facilitating parent/child and sibling relationships. And an improved graphical interface in this area provides for even greater ease-of-use. The enhanced e-mail editor and multilingual spell checker makes it even easier to produce professional mass e-mails from within SageCRM. A new Address Maintenance screen provides an easy-to-use overview of links between companies, people and addresses. And Component Manager has been overhauled to make it easier to add new capabilities to SageCRM.

### SAGECRM V6.2 BENEFITS OVERVIEW

The Branding Toolkit enables system administrators to create a branding theme based on their corporate colors so that SageCRM matches their brand identity closely.

With the Branding Toolkit, end-users can choose which themes they want to display on their interface using the preconfigured themes supplied or a new theme developed by the system administrator.

The e-mail editor and spell check feature enables users to create mass e-mails to customers using enhanced formatting features or by copying HTML code.

Using the e-mail editor feature, e-mails can be previewed before they are sent to check that formatting appears correctly; ensuring professional-looking communications at all times.

With the spell check facility, users can check the spelling of e-mails, in multiple languages if required, before they are sent; ensuring professional tone of communications at all times.

The Related Entities feature enables users to structure and graphically represent complex relationships that exist between entities in their SageCRM installation.

Using the Related Entities feature, sales executives can identify cross-selling opportunities that exist within their customer base.

With the Related Entities feature, reports can be generated and lists can be created to support cross-selling programs.

The Address Linking feature allows users to manage addresses for companies and people.

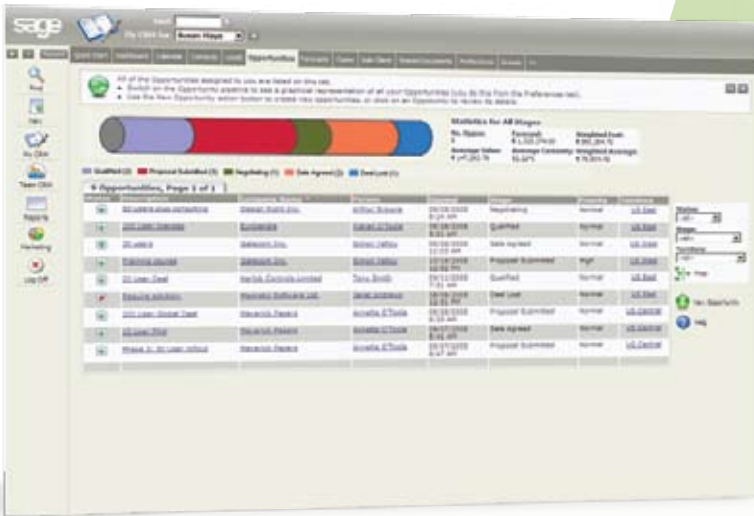
Address Linking reduces potential duplicate address entries and minimizes the amount of manual administration required for address maintenance.

## Branding Toolkit

The SageCRM v6.2 Branding Toolkit provides companies with the ability to change the look and feel of their installation. A number of preconfigured themes are supplied out-of-the-box and can be customized by system administrators. New themes can also be created from scratch. System administrators can also specify which theme is provided to users by default.



Sage Green Theme



Neutral Theme

## Themes available to use out-of-the-box:

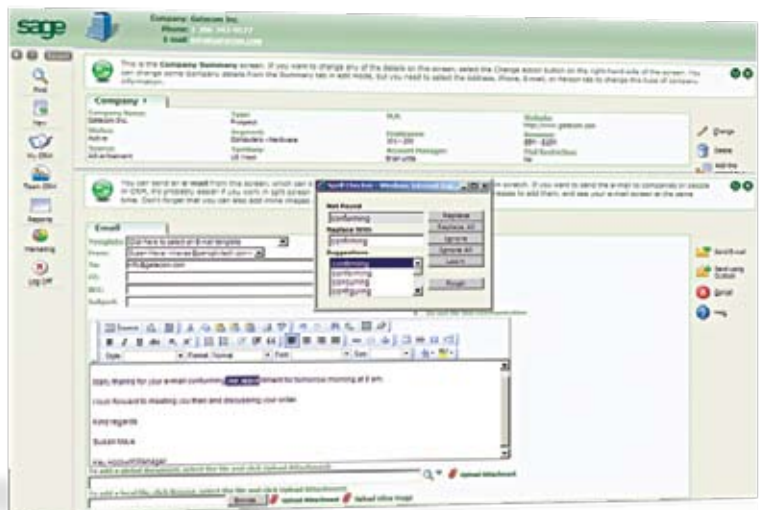
- Sage green
- Neutral
- Default (existing blue interface)

## E-mail Editor and Spell Check

SageCRM v6.2 enables users to take full advantage of e-mail marketing for highly effective communication with customers and prospects. Developing mass e-mail communications for clients has never been easier using the newly enhanced e-mail editor and spell check facility. SageCRM users can now create more professional e-mails; using HTML code if required, to develop strong and effective e-mail communications for their clients. Users can even create e-mails in multiple languages!

### E-mail editor formatting features:

- Bullet points and numbering
- Built-in style
- Word processor-like editing
- Preview
- In-window searching
- Format clearing
- Hyperlink and anchor editing
- Enhanced layout design (mixing tables/columns and images)

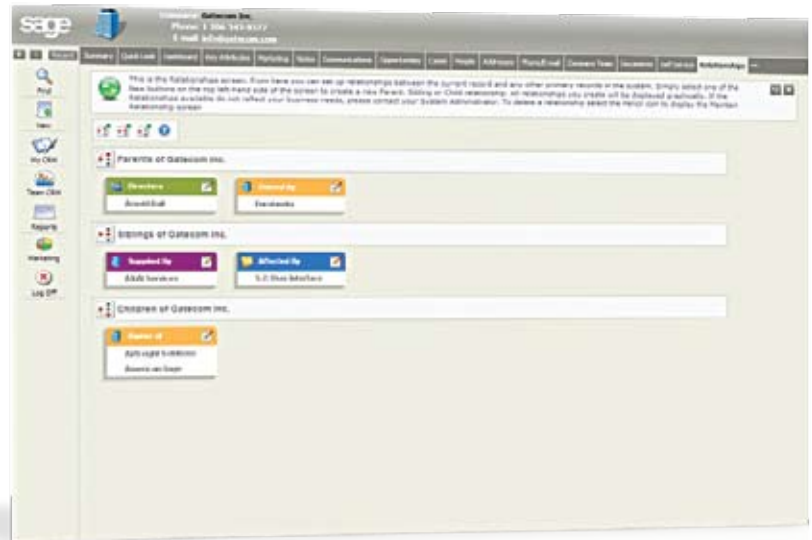


E-mail editor with spell check

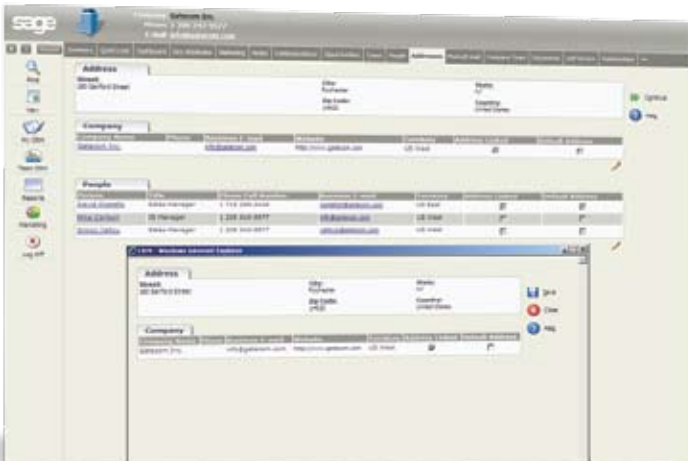
## Related Entities

SageCRM v6.2 allows customers to create multiple relationships between primary entities, such as between a holding company and its subsidiary or between a supplier and its customer. This functionality also allows customers to create many-to-many relationships which can be represented graphically, such as companies and opportunities. Relationship types are defined by the system administrator between particular entities.

This capability is particularly compelling for coordinating team selling activities into groups of companies. It can also be used by marketing departments to carry out highly specific segmentation for cross-selling programs.



All relationships are graphically defined in the relationship tab and can be amended by clicking on the pencil icon.



Easy to manage and update company address records.

## Other Enhancements

### Address Linking

SageCRM v6.2 introduces powerful new capabilities for address maintenance; making it easy to manage address details and updates for both new and existing contacts.

