SageCRM | Product Brief

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 pre-configured 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 between 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 6.2 BENEFITS OVERVIEW

The branding toolkit enables system administrators to create a branding theme based on their corporate colours 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 pre-configured 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 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 programmes.

The Address linking feature allows users 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.

The enhanced solo features optimise the synchronisation and performance of SageCRM during the offline experience as only relevant data for the user is downloaded.

Branding ToolKit

The SageCRM 6.2 branding toolkit provides companies with the ability to change the look and feel of their installation. A number of pre-configured themes are supplied out-of-the-box and can be customised by system administrators. New themes can also be created from scratch. System administrators can also specify which theme is provided to users by default.
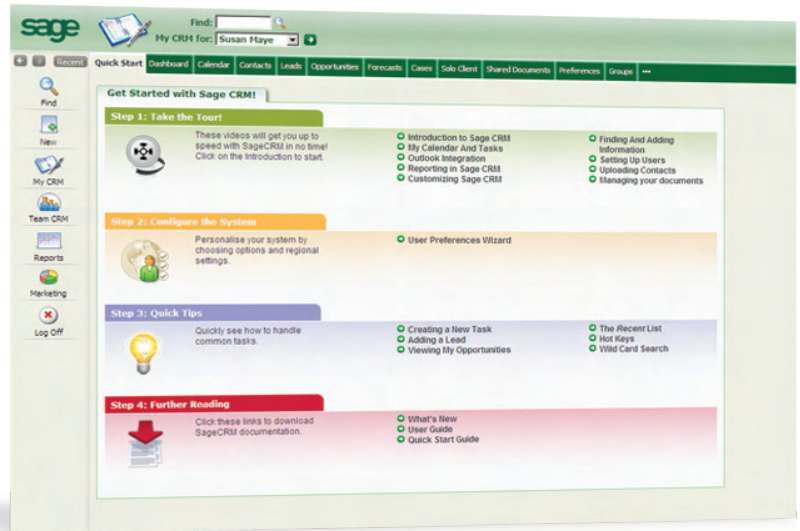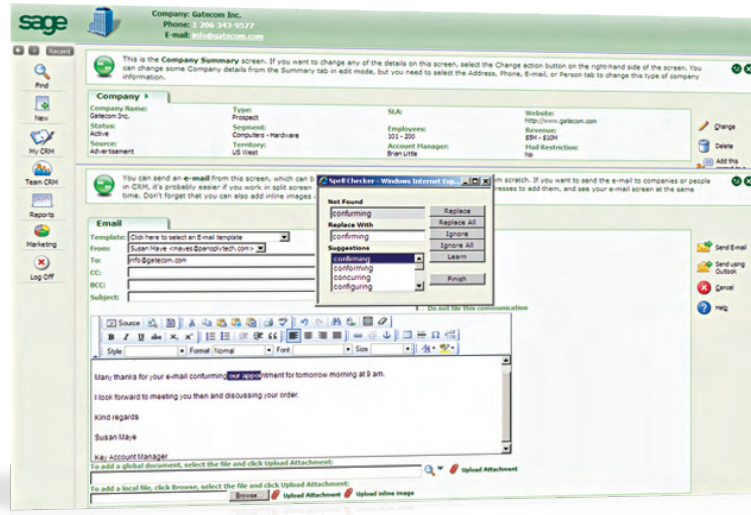

Sage Green Theme
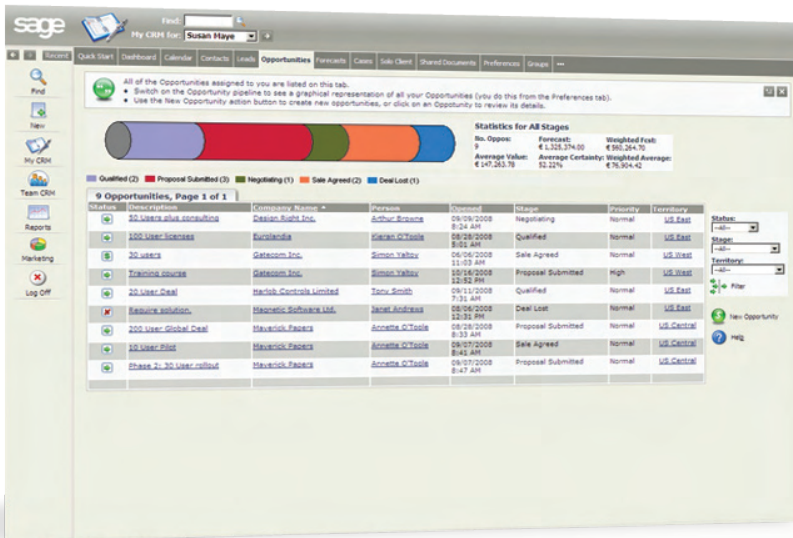
Neutral Theme

Themes which are available to use out of-the-box are:

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

E-mail Editor & Spell Check

SageCRM 6.2 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 in multiple languages.

E-mail Editor formatting features:
- Bullet Points & Numbering
- In-built 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 e.g. 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 e.g. companies and opportunities.

Relationship types are defined by the system administrator between particular entities.

This capability is particularly compelling for co-ordinating 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.
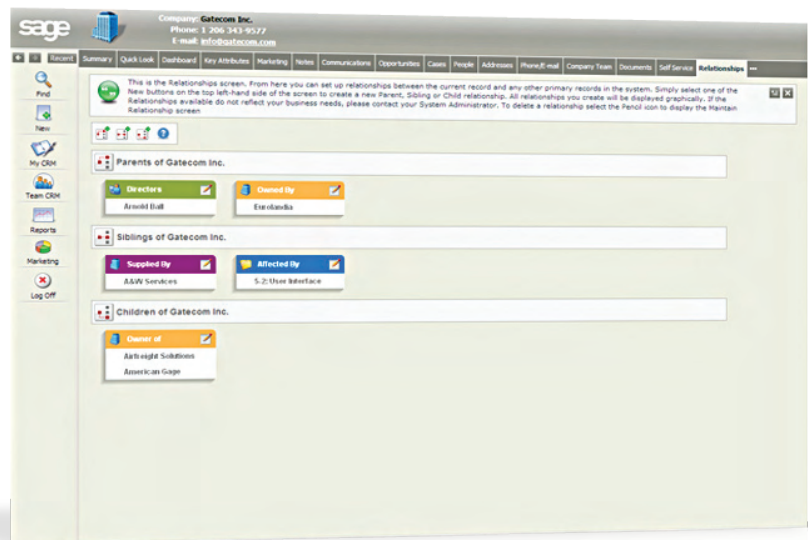
All relationships are graphically defined in the relationship tab and can be amended by clicking on the pencil icon.
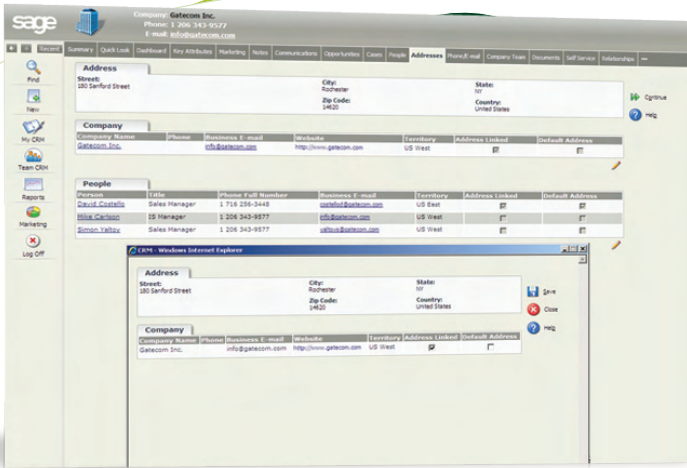
Easy to manage and update company address records.

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.

Solo Enhancements

SageCRM v6.2 enables system administrators to set up profiles for Solo users that further optimises synchronization and performance during the offline experience.

In addition to these new enhancements, a range of improvements have been made across the product in areas such as mobile user experience, outlook integration and the .NET API.
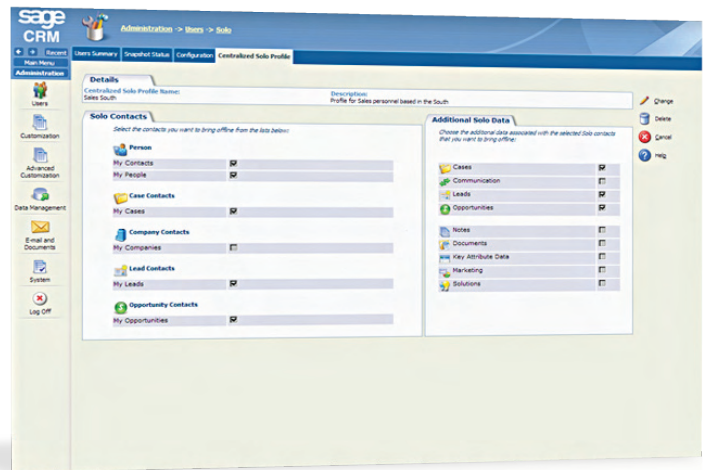
Allows administrator to define a profile for sales user.

About SageCRM

Award-winning SageCRM delivers full suite CRM (comprising sales, marketing and customer service automation) andoffers a broad range of functionality with a low TCO to small and mid-sized organisations globally.

SageCRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or wherecustomers, partners and prospects choose to interact with your business, SageCRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the SageCRM front office is powered by data from the back office to give sales, marketing, customer service and other front office staff a true 360 degree view of customers across front and back office functions, differentiating it from many other CRM solutions in the market today.

About SageCRM Solutions

SageCRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on SageCRM Solutions to develop profitable, long-term business relationships.

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