

# SageCRM | What's New

## A Comprehensive Range of Capabilities Designed to Enrich User and Ownership Experience

SageCRM v6.2 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 v6.2 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.

### Find the Exact Details You Need

The SageCRM v6.2 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, like sage green, neutral, and default, 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.



- Themes which are available to use out-of-the-box are sage green, neutral, and default (existing blue). Both the sage green and neutral themes are shown here.

### BENEFITS SNAPSHOT

The branding toolkit enables system administrators to create a branding theme based on their corporate colors so that SageCRM matches their brand identity closely. End-users can also choose which themes they want to display on their interface.

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

With related entities, users can structure and graphically represent complex relationships that exist between entities in their SageCRM installation.

Address linking allows users to manage addresses for companies and people.

The enhanced solo features optimize the synchronization and performance of SageCRM during the offline experience.

A range of improvements have been made across the product in areas such as mobile user experience, Outlook integration, and the .NET API.

## 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.

## E-Mail Editor and Spell Check

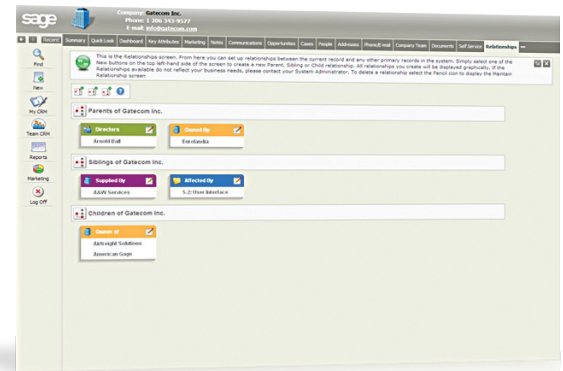
SageCRM v6.2 enables users to take full advantage of e-mail marketing for highly effective communication with customers and prospects. Developing mass e-mail communications for clients has never been easier using the newly enhanced e-mail editor and spell check facility. SageCRM users can now create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

## Address Linking

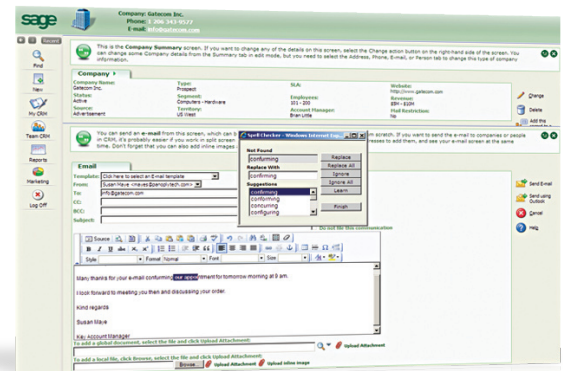
SageCRM v6.2 introduces powerful new capabilities for address maintenance; making it easy to manage address details and updates for both new and existing contacts.

## Other Enhancements

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.



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



- The e-mail editor includes formatting features like bullet points and numbering; Word processing like editing, preview, format clearing, hyperlink, and anchor editing; and more. The e-mail editor with spell check is shown.

## About SageCRM

Award-winning SageCRM delivers full suite CRM (comprising sales, marketing, and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organizations 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 where customers, 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 Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

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