

March 2013



# Sage CRM 7.2 Release Preview



Sage CRM

# Sage CRM 7.2 Release Preview

## Overview

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The release of Sage CRM 7.2 delivers a host of exciting new features and enhancements that help you leverage the latest trends in mobility, Social CRM, and business collaboration. Mobile and Social CRM adoption continues to rise globally and in recognition of these key trends, Sage CRM 7.2 brings with it greater Social CRM capabilities with Sage CRM for Facebook and enhanced mobile functionality with two powerful sales apps for the iPhone and Windows 8.

Business collaboration is a key feature of this release with the addition of Business Collaboration powered by Yammer, a powerful tool that enables greater collaboration across teams. Smarter reporting is now possible with the help of enhanced features built to enable faster, secure, customised reports.

Additionally, the latest release includes integration with Sage's leading ERP solution for small and medium businesses, Sage ERP X3. This enables businesses to benefit from a powerful integrated solution, with instant access to real-time ERP data from within Sage CRM, putting customers at the centre of your business.

These new features and enhancements across the product suite are designed to enable customers to benefit from:

- Greater sales team productivity
- Mobile workforce enablement
- Business wide efficiency
- Better informed decision-making
- Instant information about customers and prospects
- Increased speed in accessing the right information

### Business Collaboration powered by Yammer: Drive employee collaboration and knowledge exchange



Business collaboration across teams using Sage CRM is now possible with new social-style collaboration powered by Yammer. Teams can now collaborate with Yammer Groups and across records to discuss and collaborate on important topics. This makes business conversations concerning opportunities, leads and support cases more social and transparent, providing greater visibility for all employees. What's more, Yammer feeds available in the Company's screen in Sage CRM enable employees to stay on top of relevant conversations happening across the business. These Yammer feeds allow employees to quickly engage in conversations and loop relevant team members into a discussion.

### Sage CRM Sales Lite & Sage CRM Sales Tracker: Empower your sales team with dedicated sales apps



What could be more important to a sales force than mobility? Sage CRM native apps for the iPhone and Windows 8 provide mobile sales teams with real-time data to help them manage their business relationships wherever they are. Sage CRM Sales Lite for the iPhone is designed for sales users on the road who need up-to-date information on their phone, even when out of coverage. Sage CRM Sales Lite gives users mobile access to their Sage CRM data, tasks and appointments, and native integration with the iPhone allows users to map appointments, track and log outbound calls, email and SMS activities.

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Sage CRM Sales Tracker for Windows 8 gives users access to their Sage CRM Company, Person and Opportunity records from their Windows 8 Tablet device. Users can even build a list of favourite opportunities key to their pipeline and drill down to record details to get a full picture of the opportunity they are working with. Sage CRM Sales Tracker can also be accessed via a Windows 8 PC.

### Sage CRM for Facebook: Instant information about your customers and prospects using Social CRM



The Social CRM suite, which already integrates with key social media applications including LinkedIn and Twitter, is enhanced further with new social capabilities that allow Sage CRM teams to gain customer insights from Facebook, providing them with a complete picture of customer and prospect interactions, without leaving Sage CRM. Sales teams can now use this new found information to better understand the prospects they are pitching to, enabling them to customise the sales pitch to potential customers.

### Smarter Reporting: Access the data needed for better decision making



Sage CRM 7.2 offers smarter reporting with enhanced features built to enable faster, secure, customised reports, quickly populated with the latest CRM information. Rich new graphic charts and report cloning capabilities enable users to quickly create visual reports with interactive graphs, for at-a-glance business insight and informed decision-making.

### Sage CRM & Sage ERP X3: Delivering a complete view of customer information across your entire business



The tight integration between Sage CRM and Sage ERP X3 enables your business to benefit from a single solution to manage every customer interaction from opportunity management right through to billing and payments. Enhancing your ERP solution with CRM functionality helps enable company-wide productivity and efficiency by giving staff access to important information they need to succeed. Giving your sales, marketing and customer service staff access to real-time ERP information from within Sage CRM, helps to increase team efficiency and maximise revenue potential.

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### Business Collaboration powered by Yammer

Sage CRM Collaboration powered by Yammer brings the power of Yammer's secure, private social network for your company right into the heart of Sage CRM. This first version is a free, downloadable Sage CRM component, which makes use of Yammer's standard offering. No premium purchase is required.

- [Install Sage CRM Collaboration](#)
- [Sign in to Sage CRM Collaboration](#)
- [Post an update to a group](#)
- [Activate the news feed slider](#)
- [View all Yammer topics for a Sage CRM customer](#)

### Sage CRM for Facebook

With 7.2 comes a simple Facebook integration designed to give businesses an insight into their contacts' and companies' exposure on Facebook, and to be able to search for and save these details from within the Sage CRM interface.

- [Install Facebook for Sage CRM](#)
- [Search Facebook from the Person Summary page](#)
- [View a company's Facebook feed from Sage CRM](#)

### Sales Tracker for Windows 8

Sales Tracker gives mobile sales people view-access to Sage CRM sales and contact data on the road using Windows 8 tablet devices.

- [Download the Sales Tracker app](#)
- [Sign in to Sales Tracker](#)
- [View recent Sage CRM sales from Sales Tracker](#)
- [Searching using the Windows 8 Charms bar](#)
- [Changing Sales Tracker data refresh options](#)

### Sales Lite for iPhone

Sales Lite is an iPhone app that is specifically designed for sales users on the road who need up-to-date information on their phone (even when out of coverage).

- [Download the Sales Lite for iPhone app](#)
- [Log on to Sales Lite](#)
- [Get Data into Sales Lite](#)
- [Work Offline with Sales Lite](#)
- [Send an e-mail to a contact in Sales Lite](#)
- [Add a note to a sales opportunity in Sales Lite](#)

### Sage CRM for Tablet with iOS support

Want Sage CRM access from your tablet too? The new device/theme for optimizing Sage CRM for tablet is now supported as an integral part of Sage CRM On-Premise, as is access to most key Sage CRM features using the regular "Desktop" version of Sage CRM from your iPad.

- [Set tablet access preference](#)
- [Log on to Sage CRM from a tablet](#)
- [Add customer data to Sage CRM from a tablet](#)

### Sage CRM and Sage ERP X3 Integration

Based on the established Sage integration standard of SData (Sage Data), this integration delivers direct access to quote, order, invoice and sales credit information from Sage ERP X3 into the hands of Sage CRM users.

- [View Sage ERP X3 quotes and orders from an opportunity](#)
- [Drill-down into Sage ERP X3 invoices from an account](#)
- [Validate a Trading Account reference from Sage ERP X3](#)

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### Reporting Enhancements

Once you have created a great report, you can now easily clone and repurpose it for a new report. Building a report has improved too, with columns alphabetically sorted in your local language. And there's a simple switch to remove the Export to PDF/CSV/Excel options for non-admin users.

- [Clone a report](#)
- [Select report columns from an alphabetically sorted list](#)
- [Secure report output from export](#)

### Fusion Charts Enhancements

In the latest version, FusionCharts are generated in HTML 5 – so no Flash installation is required. New chart types have been added to Sage CRM and a FusionWidgets library is shipped with the install. FusionWidgets can be used by Business Partners and Developers to create custom charts and elements for advanced data visualization.

- [Add a funnel, doughnut or pyramid chart type to a report](#)
- [Add a gauge graphic using FusionWidgets](#)

### Client-Side API

A simple, upgrade-proof set of client-side functions, which can be called from the OnChange Script or Custom Content fields, or by referencing an external file from either of these locations. This can be most powerfully used to change the appearance of fields on a screen to make user input faster and easier. A basic conceptual knowledge of coding is helpful, but not essential.

- [Add a colour highlight to required fields](#)
- [Add a Print button to the Lead Summary tab](#)

### Notifications Enhancements

On-screen notifications no longer interrupt the user's current task. Instead, a clear notifications area is available at the top of the screen which shows the number of active notifications. Users can expand or hide their current notifications, and choose to snooze or clear individual or all notifications.

- [View the number of current notifications](#)
- [Snooze or clear a notification](#)

### More on 7.2

- [Register your copy of Sage CRM](#)



# Sage CRM 7.2 Release Preview

## Business Collaboration powered by Yammer

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### Install Sage CRM Business Collaboration

To install the Sage CRM Collaboration component:

1. Download the component from the Sage CRM community Apps & Extras area.
2. Save the component zip file to, for example, your desktop.
3. Go to **Administration | Customization | Component Manager**, choose the zip file from where you saved it, and select **Install Component**.
4. Go to **Administration | Users | Users**, and edit the user accounts for the users who should have rights to use the Yammer add-on.
5. Set the **Can Yam** flag to **Yes** on a per-user basis.

### Sign in to Sage CRM Business Collaboration

To sign in to Sage CRM Collaboration:

1. Go to **My CRM | Yammer**.
2. Sign in to Yammer using your usual work e-mail address, which you use to access your company's Yammer Network. If you don't have a Yammer logon, go to Yammer and sign up first.

From the My CRM | Yammer tab you can carry out many of the same actions that you can from your Yammer Home page such as following people, posting updates, and switching between groups.

### Post an update to a group

To post an update to one the groups you are a member of:

1. Go to **My CRM | Yammer**.
2. Select the Group from the Groups drop-down at the top of the tab.
3. Type the update in the text box.
4. Select **Update**.

### Activate the news feed slider

The Yammer news feed remains accessible wherever you are working in Sage CRM. To activate the Yammer news feed:

1. Select the **Yammer** icon from the bottom right of the screen.
2. The news feed is displayed, and you can make an update directly from the news feed slider.

### View all Yammer topics for a Sage CRM customer

To view all Yammer topics relating to a Sage CRM customer:

1. Select **Find | Company**, and open the company record.
2. Select the **Yammer** tab.
3. A list of all Yammer posts relating to the company topic is displayed. This is usually in the format #Sage CRM – [company name].
4. To add a new post relating to the company topic, type the text – which is automatically prefixed with the company topic name – and update.

You can also follow a topic for a particular company and receive Yammer notifications when new posts are added to the Company topic you are following.

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# Sage CRM 7.2 Release Preview

## Sage CRM for Facebook

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### Install Sage CRM for Facebook

To install the Facebook for Sage CRM component:

1. Download the component from the Sage CRM community [Apps & Extras](#) area.
2. Save the component zip to, for example, your desktop.
3. Go to **Administration | Customization | Component Manager**, choose the zip from where you saved it, and select **Install Component**.

### Search Facebook from the Person Summary page

To find a person on Facebook from Sage CRM:

1. Select **Find | Person**, and open the person record.
2. From the Summary tab, select **Search Facebook**.
3. A new page displays a Facebook search results with a number of suggested matches. **Note:** If you have not already signed in to Facebook, then sign in first.
4. Select the person in Facebook.
5. Copy their Facebook URL to your clipboard, and back in CRM select the Edit button.
6. Paste the person's Facebook URL into the **Facebook** field.
7. Save. The person's Facebook link is saved with the person record in Sage CRM, and a Facebook icon is displayed next to the field – and also next to the person in search results. Clicking on this icon will go directly to the person's profile page in Facebook.

If a public profile picture is available, the picture replaces the Person icon in the top content area of the person page in CRM.

### View a company's Facebook feed from Sage CRM

To view a company's Facebook feed from Sage CRM:

1. Select **Find | Company**, and open the company record.
2. From the Summary tab, select **Search Facebook**.
3. A new page displays a Facebook search results with a number of suggested matches. **Note:** If you have not already signed in to Facebook, then sign in first.
4. Select the company in Facebook.
5. Copy the company Facebook URL to your clipboard, and back in CRM select the Edit button.
6. Paste the company's Facebook URL into the **Facebook** field.
7. **Save**. Two new links are also displayed next to the Facebook field: **Profile** and **Feed**.
8. Select the **Feed** link to open the company's feed in a pop-up within CRM. The **Profile** link opens a new window, bringing you to the company Facebook profile.

If CRM can retrieve the company's profile picture, it replaces the company icon at the top of the company page in CRM.

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# Sage CRM 7.2 Release Preview

## Sales Tracker for Windows 8

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### Download the Sales Tracker app

To download the app:

1. Go to the [Windows 8 App Store](#) from your Windows 8 device.
2. Search for Sage CRM.
3. Select **Sage CRM Sales Tracker**.
4. Select **Install**.

### Sign in to Sales Tracker

To sign in to Sales Tracker:

1. Select the **Sage CRM Sales Tracker** tile from the Start screen.
2. Read and accept the terms & conditions, and enter your user name and password in the Sign In screen.

### View recent Sage CRM sales from Sales Tracker

To view Sage CRM data from Sales Tracker:

1. The **Opportunities** screen shows a doughnut-style graphic of your recent sales opportunities by stage.
2. Swipe right to left and you'll see recently added companies, and then people.
3. Select a record to drill down and get more detail.
4. Select the Favourites icon to add the record to your Favourites list.

### Searching using the Windows 8 Charms bar

To search for a company in Sales Tracker:

1. Swipe right to left within Sales Tracker to activate the Windows 8 **Charms bar**.
2. Type the company name into the Search box and select the magnifying glass icon.
3. Matches for the company name are displayed. Select the company to drill-down into the company record.

### Changing Sales Tracker data refresh options

To change, for example, the data refresh option on startup:

4. Swipe right to left within Sales Tracker to activate the Windows 8 **Charms bar**.
5. Select **Settings | Options**.
6. Set the **Refresh On Startup** slider to On/Off.

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# Sage CRM 7.2 Release Preview

## Sales Lite for iPhone

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### Download the Sales Lite for iPhone app

To download the app:

1. Make sure that:
  - You have an iPhone model which is 3GS or later
  - iOS 5 or later on your iPhone
  - You are enabled for web service access in Sage CRM. Your System Administrator can check this in **Administration | Users | Users | Allow Web Services Access**.
2. Go to the App Store from your iPhone.
3. Search for Sage CRM.
4. Select **Sage CRM Sales Lite for iPhone**.
5. Select **Free | Install App**.

### Log on to Sales Lite

To log on for the first time:

1. Select the **Sales Lite** icon from your home screen.
2. The first time you log on, you will be prompted to enter the URL of your CRM install. If you are not sure what it is, you can get it from your System Administrator.
3. A successful logon displays the app home page, and an initial download of data is started.

### Get Data into Sales Lite

You can view and work with all people and opportunities which you normally have access to from your desktop, and your appointments and tasks for the next 14 days.

1. From the app home page, select **Update Data from Sage CRM**.
2. Your iPhone contacts are also displayed in the **Sales Lite | Contacts** area.
3. To add an iPhone contact into Sage CRM, select **Add to CRM** from the contact screen.
4. The iPhone contact gets added into Sage CRM as a **Lead** record.

### Work offline with Sales Lite

You can see your contacts, opportunities and calendar offline. You can also send communications or write notes which will be synchronized to Sage CRM later. To work offline:

1. Make sure you already have data to work with in Sales Lite.
2. On the logon screen, select **Work Offline**.
3. When you are back online, you can synchronize your data from the Home screen

### Send an e-mail to a contact in Sales Lite

To send an e-mail to a person in the Sales Lite app:

1. Select **Contacts** from the app home page.
2. Search for the person by typing in part of their first or last name.
3. Select the person, and tap their e-mail address.
4. Type the e-mail and send. The e-mail is recorded in Sage CRM as a completed communication.

### Add a note and Picture to a sales opportunity in Sales Lite

To add a note and a picture to a sales opportunity:

1. Select **Opportunities** from the app home page.
2. Search for the opportunity by typing in part of the description, or the name of the company or person it is associated with.
3. Select the opportunity, and tap **Add Note**.
4. Add a picture by tapping the photo icon. If you are offline, the note and picture will get added to Sage CRM next time your data is refreshed. Pictures saved as documents in Sage CRM and can only be viewed with the opportunity when working with Sage CRM from the full desktop version

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## Sage CRM for Tablet with iOS support

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### Set tablet access preference

To set a default access preference for with Sage CRM from a tablet device:

1. Make sure you are logged on to the Desktop version.
2. Select **My CRM | Preferences**.
3. Set the **Default Tablet Version** field to either Desktop Version or Tablet Version.

### Log on to Sage CRM from a tablet

You can reach the Logon page in this way:

1. Open the internet browser on your tablet device.
2. In the address box, enter the same address you use to access Sage CRM from your desktop or laptop.
3. Enter your logon details and select Log On. The home page for the tablet theme or your desktop version is displayed.

### Add customer data to Sage CRM from a tablet

To add information:

1. Tap the **New** button on the Main Menu.
2. Tap the record type you want to create. For example, Company.
3. Enter the details in the input form. Different field types open different types of interface. For example, a text box opens the keyboard. Any required fields are marked with an asterisk after the field name.
4. Tap the Save button at the top of the page. If there are any validation errors, you will receive a pop-up message and required fields are highlighted in yellow.

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## Sage CRM and Sage ERP X3 Integration

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### View Sage ERP X3 quotes and orders from an opportunity

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To view Sage ERP X3 quotes and orders:

1. Find and open an opportunity record in Sage CRM.
2. Select the **Quote / Order** tab.

A real-time view of Sage ERP X3 quotes and orders attached to an opportunity is displayed.

### Drill-down into Sage ERP X3 invoices from an account

To view the detail of an invoice:

1. Find and open an account record in Sage CRM.
2. Select the **Sales Invoices** tab. A real-time view of Sage ERP X3 invoices associated with the account is displayed.
3. Select an invoice to view the detail.

### Validate a Trading Account reference from Sage ERP X3

This is a customizable option in the implementation of this integration. If preferred, the field can be read-only in CRM, with full control of this field residing in Sage ERP X3. These steps show how the validation works if it is implemented:

To validate a trading account reference:

1. Select **New | Account**.
2. Enter the account type, then add the code for the Trading Account Reference in the field.
3. Select the icon next to the **Trading Account Reference** field.
4. The Sage ERP X3 system is queried and a message or tick icon is displayed to the user to indicate if the code is valid.
5. Complete the remaining account fields.
6. **Save**.



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## Reporting Enhancements

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### Clone a report

To clone a report:

1. Select the **Edit** button next to the report that you want to clone.
2. Select the **Clone** button.
3. Give the report a new unique name, and **Save**.

### Select report columns from an alphabetically sorted list

To add a new field/column to an existing report:

1. Select the **Edit** button next to the report.
2. Choose the field from the Select Column list. This list is sorted alphabetically by entity, then by field name.
3. Continue through the remaining report steps, and **Save**.

### Secure report output from export

To prevent normal users from generating PDF or spread sheet report output:

1. Select **Administration | E-mail & Documents | Documents & Reports Configuration**.
2. Set the field **Reports export visible for non-admin users** to **No**.

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## FusionCharts Enhancements

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### Add a funnel, doughnut or pyramid chart type to a report

To run a sales report to show a funnel graphic of your open opportunities:

1. Go to **Reports | Sales | My Open Opportunities**.
2. Select the **Edit** button next to the report, and continue through the report to Report Options, Step 2 of 2.
3. In the Chart Options section, change the Chart Type to **Funnel**. Other new options include Doughnut and Pyramid.
4. **Save**, and then run the report. The existing horizontal bar chart is replaced by a funnel graphic.

### Add a gauge graphic using FusionWidgets

To add, for example, a speedometer-style gauge to the Company Summary screen to show the percentage of cases solved within their Service Level Agreement:

1. Go to **Administration | Customization | Company | Screens**.
2. Edit the **Company Entry Screen**.
3. Add the code referencing the Angular Gauge chart type to the Custom Content field. Please see <http://docs.fusioncharts.com/widgets> for more information.
4. **Save**.

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## Client-Side API

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### Add a colour highlight to required fields

To add, for example, a pink highlight colour on all required fields when adding a new company:

1. Go to **Administration | Customization | Company | Screens**.
2. Edit the Company Entry Screen (**CompanyBoxLong**).
3. Add the following script to the Custom Content field:

```
<script>
crm.ready(function()
{
crm.MarkRequiredFields("pink");
});
</script>
```

4. **Save**. Then return to the Main Menu area and select **New | Company**.

### Add a Print button to the Lead Summary tab

1. Go to **Administration | Customization | Leads | Screens**.
2. Edit the Lead Custom Screen (**LeadCustomScreen**).
3. Add the following script to the Custom Content field:

```
<script>
crm.ready(function()
{
crm.AddButton("print");
});
</script>
```

4. **Save**. Then return to the Main Menu area, search and open an existing lead.

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# Sage CRM 7.2 Release Preview

## Notifications Enhancements

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### View the number of current notifications

To view how many notifications you currently have:

1. Log on to CRM and look in the top left-hand corner of the screen.
2. If there are no notifications, schedule yourself two or three tasks or appointments with the reminder feature switched on for the current time or earlier.

### Snooze or clear a notification

To snooze or clear a notification:

1. Select the notification link in the top left-hand corner of your screen.
2. Select the “**x**” to clear a single notification or the **Snooze for** drop-down to remove the notification for a set period of time.

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# Sage CRM 7.2 Release Preview

## More on 7.2

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### Register your copy of Sage CRM

To register your copy of Sage CRM:

1. Complete the registration details in the last step of the install process. If you are working with a business partner, they may have already done this during the installation for you.
2. If your copy of Sage CRM is not registered and the install has already been carried out, a blue banner is displayed in the product until the registration is complete.
3. To complete registration, go to **Administration | System | License Key Details** and fill in the required fields.

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Note: All features described are for preview only and are not currently supported as released features. The links to detailed documentation and videos are in the process of being updated for 7.2 – the content is provided as a guide only.

[sagecrm.com/7.2](http://sagecrm.com/7.2)



## About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day. Award-winning Sage CRM equips businesses 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, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the Sage CRM 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.

See for yourself the difference that Sage CRM could make to your business. Visit [www.sagecrm.com](http://www.sagecrm.com) and start your free 30 day trial of Sage CRM now.

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