



SageCRM.com

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 SageCRM.com 7.0.

The cross-referenced documents in this guide are available with the 7.0 release.

Note: An additional button, System Help, is available on the Main Menu in the SageCRM.com product. Clicking on this button gives you access to additional documentation, training and support materials. This button may not be visible on all screenshots in this guide.

Summary of Features

The 7.0 features described in this guide include:

- Themes enhancements and new branding
- Related Entities
- Enhanced E-mail Editor
- Address Links
- Enhanced Solo Filtering
- Quote and Order enhancements
- More Features
 - Calendar weekday start supported in monthly view
 - New in-product help format
 - CSV file delimiter setting

Chapter 2

Themes Enhancements and New Branding

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

- An updated “look and feel” of colors, icons, tabs, and more inside CRM, in line with the new branding.
- New standard themes.

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

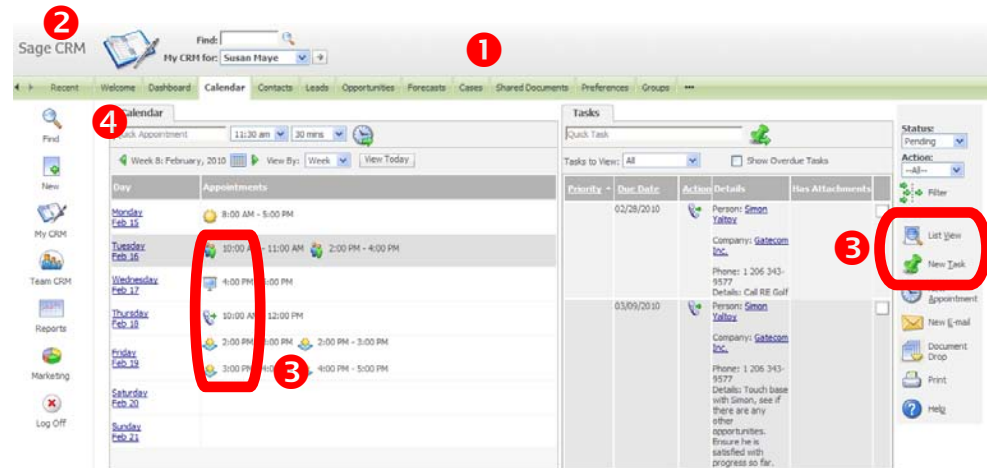
Who can I log on as?

To view the new themes and branding you can log onto CRM as a standard user.

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

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

Areas you’ll notice right away include:



1 Overall color scheme.

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

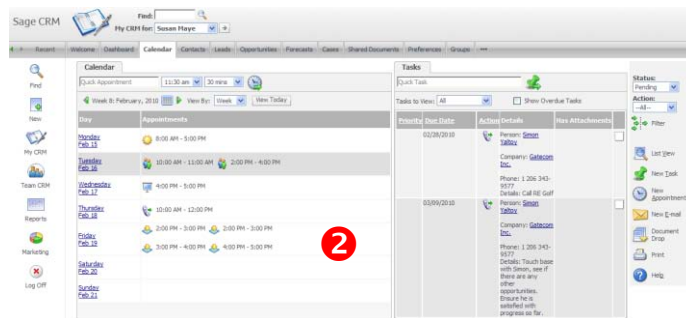
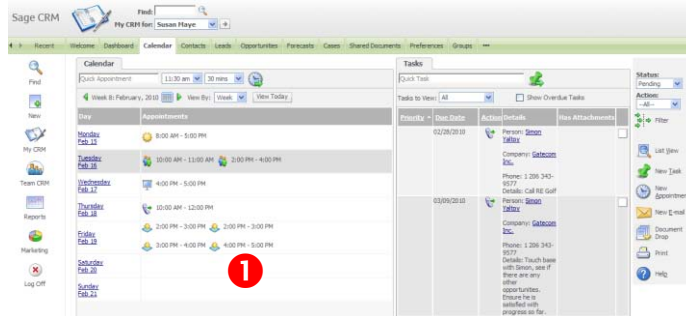
2 Top left logo.

3 Updated icons.

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

What new themes are supplied with this release?

Two new themes have been added:



① Sage theme. This is the default theme, characterized by green textured tabs.

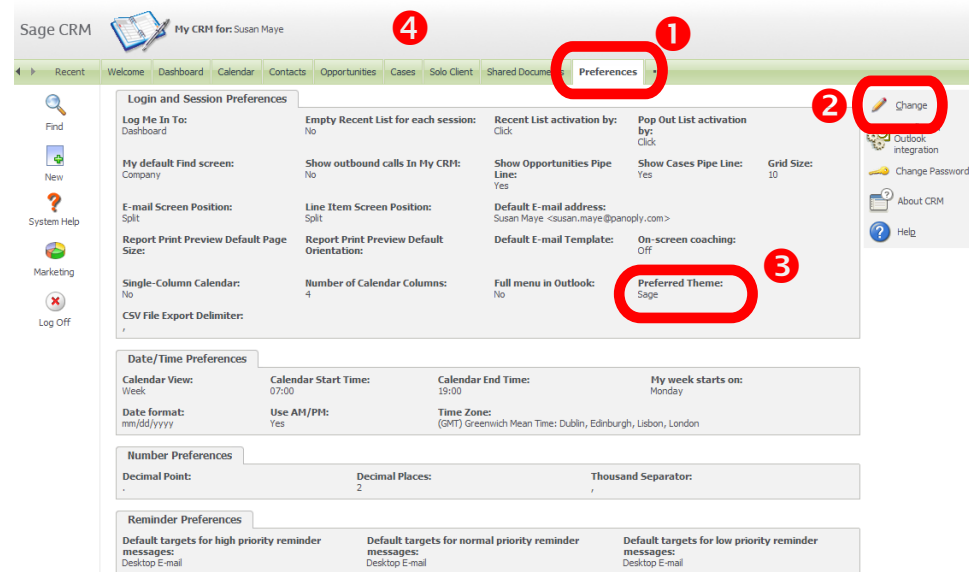
② Neutral theme. Silver textured tabs.

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.

How do I change the UI look and feel?

You can switch between the themes supplied with the product.

To switch themes:



- 1 Select My CRM | Preferences.
- 2 Select the Change button.
- 3 Select an alternative theme from the Preferred Theme drop-down field, and save.
Log off and log on again.
- 4 The look and feel of the alternative theme is displayed.

Where can I get more information?

More information on this feature is available in the:

- *User Guide*

Chapter 3

Related Entities

The following new Related Entities functionality is available in version 7.0:

- Set up multiple reciprocal relationship types between primary entities. For example, Holding Company and Subsidiary, Supplier and Customer.
- Create many-to-many relationships between, for example, companies and opportunities.
- View a graphical representation of many-to-many relationships.

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

Who can I log on as?

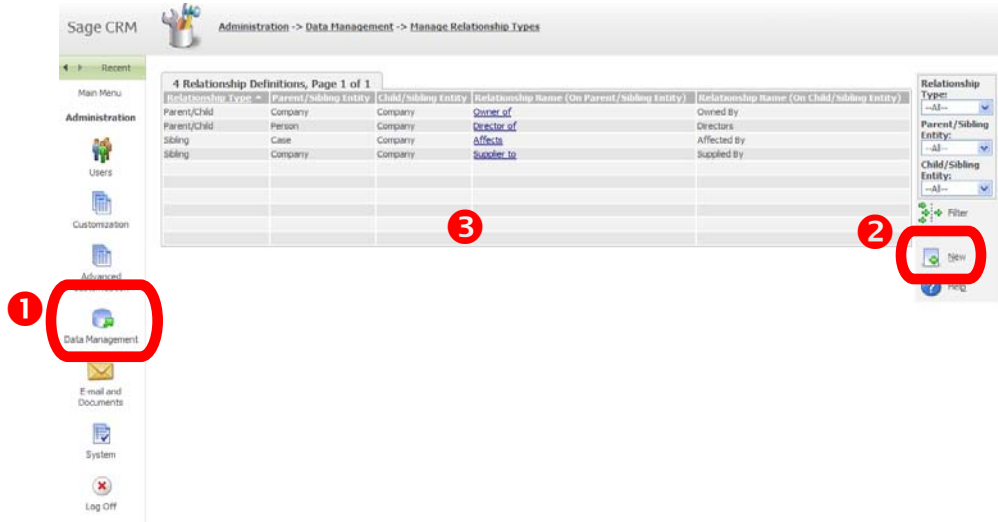
To set up relationship types and names you need to be either an Info Manager with Data Rights or a System Administrator. To try out this feature you can log onto CRM as an admin user.

To create relationships between entities and view existing relationships you can log onto CRM as a standard user.

Can I reflect different relationship models in CRM?

Yes. You can set up multiple relationship types to reflect the different organizational models of the customer, supplier, or even competitor data held in your CRM system.

To set up new relationship types:



1 Select Administration | Data Management | Manage Relationship Types.

2 Select the New action button. Complete the fields on the Related Entity Link page. For example:

Relationship Type :	Parent/Child
Parent/Sibling Entity:	Company
Child/Sibling Entity:	Person
Relationship Name (On Parent/Sibling):	Has Contractors
Relationship Name (On Child/Sibling):	Contracts For

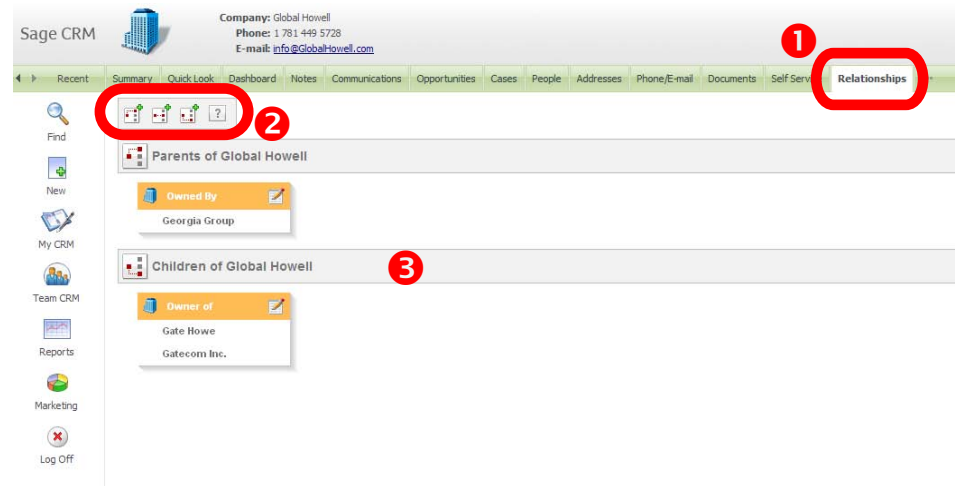
Select Save.

3 The new relationship is displayed in the list of Relationship Definitions, and users can now set up relationships between companies and their contractors.

How do I link a parent company to its subsidiaries?

The Relationships tab is available on all main entities. Once your System Administrator has set up the relationship types, you can add new relationships into the system.

To set up new relationships on the Company Relationship tab:



- 1 Select Find | Company and search for the company, then click on the hyperlink of the company.

Select the Relationships tab.

- 2 Click on, for example, the New Parent icon to add a new parent relationship.

Select the type of relationship, for example, Owned By, from the Relationship field.

Search for the subsidiary company in the Company field. Select Save.

Repeat for other relationships you want to display on this tab.

- 3 The new relationships are displayed on the Relationships tab.

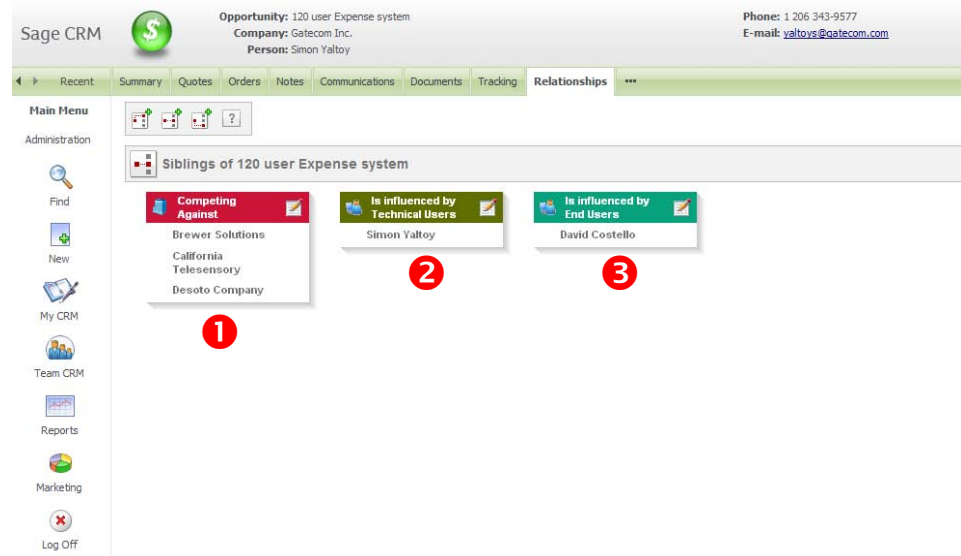
Use the pencil icon to edit the relationships. Use the hyperlinks to navigate to the related entities.

All relationships are reciprocal. This means that if you have set up a link from, for example, Global Howell to Gatecom from the Global Howell company record, the reciprocal relationship is automatically displayed on the Gatecom Relationships tab.

Can I use Related Entities to track complex Sales Opportunities?

Yes. Once the relationship types are defined by the System Administrator, it is a powerful way to track relationships between Sales Opportunities and competitors, buying and selling influencers.

This example shows sibling relationships between:



- ① Opportunity and company (competitors).
- ② Opportunity and person (technical buying influence).
- ③ Opportunity and person (end user buying influence).

Since all the relationships are reciprocal, another CRM user viewing the Company Relationship tab of the competitor will automatically see a listing of all opportunities where your organization has been up against this particular competitor.

Where can I get more information?

More information on this feature is available in the:

- *User Guide*
- *System Administrator Guide*

Chapter 4

Enhanced E-mail Editor

The following enhanced E-mail Editor functionality is available in version 7.0:

- Enhanced formatting options.
- Ability to add tables.
- Preview and print options.

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

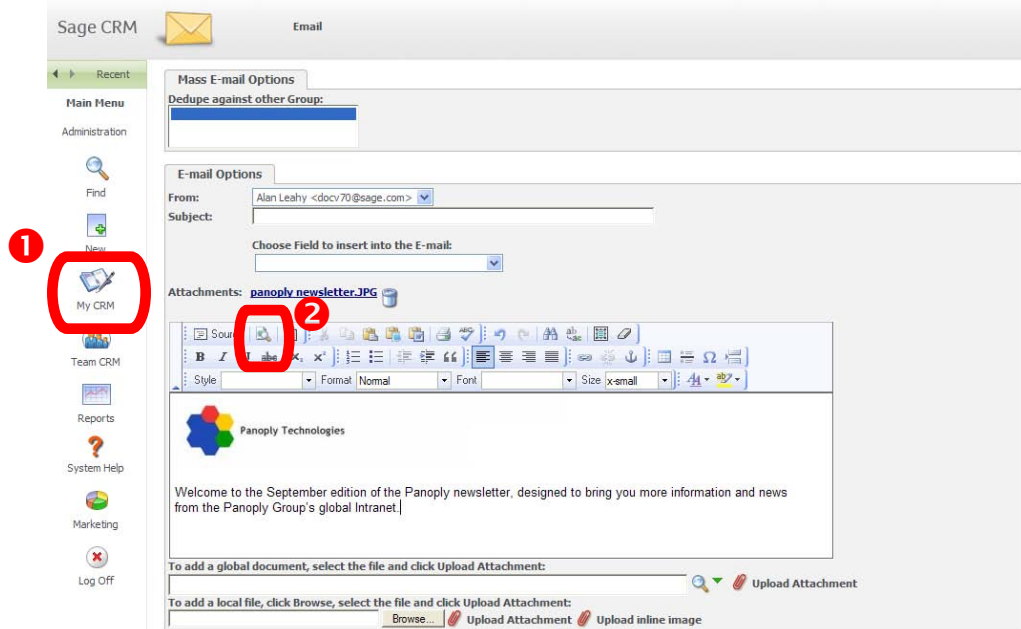
Who can I log on as?

To use the enhanced e-mail editor feature, you can log in to CRM as a standard user.

Can I send high quality mass e-mails?

Yes, a number of enhanced formatting options have been added to the e-mail editor in version 7.0.

To use the new e-mail editor in mass e-mailing:



- 1 Go to My CRM | Groups, click the group name hyperlink and click the New E-mail button.

You can type a message in standard text, and use the enhanced formatting options to format the text. Alternatively, you can copy HTML content and paste it into the body field. If you are an experienced HTML author, you can edit the content you copied into the body of the e-mail by clicking the Source button, which is located beside the Preview button 2.

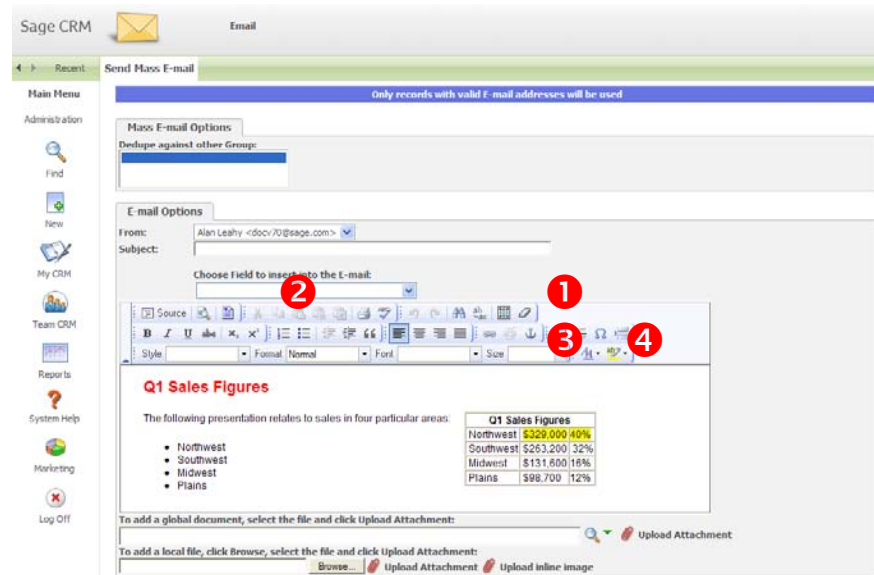
- 2 To check the content of your e-mail looks exactly how you want it, you can click the Preview button. A preview of your e-mail is displayed in a separate window.

Note: As in earlier versions, it is recommended you use the Send Yourself Test E-mail before sending out the mass e-mail.

Can I use bullets and numbering in my HTML e-mails?

Yes, and you can insert tables and use a number of other text formatting options in your mass e-mails too.

To use the new formatting features:



1 You insert a table by clicking the Insert/Edit Table button.

A Table Properties dialog opens, in which you can enter the properties of your table before inserting it. Properties you can enter before inserting the table include the number of rows and columns, the table's width and height, border size, cell spacing and alignment. You can also enter a table summary and caption.

The table will be inserted in HTML code, and can be edited manually by clicking the Source button.

2 To use bullets and numbering you can click the Insert/Remove Numbered List or Insert/Remove Bulleted List buttons.

3 You can change the color of text by clicking the Text Color button.

4 You can highlight text by clicking the Background Color button.

Where can I get more information?

More information on this feature is available in the:

- *User Guide*

Chapter 5

Address Links

The following Address Links functionality is available in version 7.0:

- View relationships between an address and other entities from the address links page.
- Edit the relationships between an address and other entities from the address links page.

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

Who can I log on as?

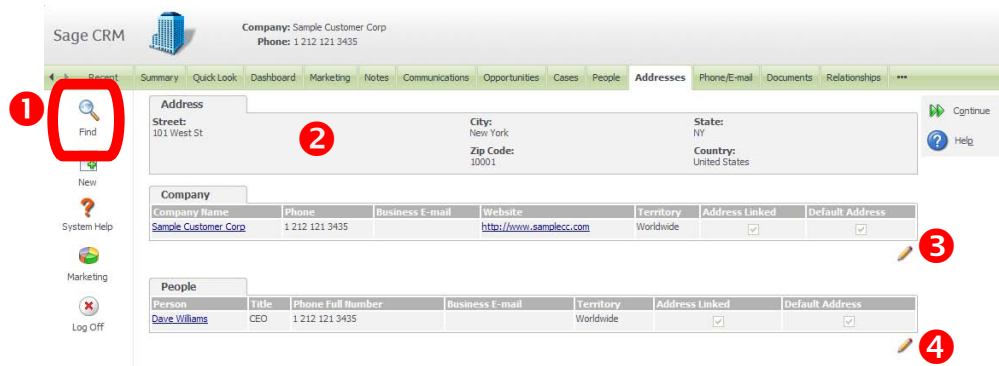
To use the Address Links feature you can log onto CRM as a standard user.

How do I access Address Links and why would I need to?

Address Links gives an overview of existing relationships between Companies, People and Addresses, and reduces the number of duplicate entries of addresses by allowing linking from the Address Links page.

You can access Address Links from the Addresses tabs within the context of a Company or Person.

To access Address Links from the Addresses tab:



1 Select Find | Company, and click on the hyperlink of the company name.

 Select the Addresses tab, and click on the Link Status icon in the list of addresses.

2 The Address Links page for the selected address is displayed.



This page shows how the selected address is related to the company and to the other people within the company. In this example, for Gatecom Inc, the Address Links page shows:

3 The 400 Pine Street address is linked to the Company, and is the default company address, which will be used for mailings etc.

4 The 400 Pine Street address is also linked to two other contact people within Gatecom, Mike Carlson and Simon Yaltoy, and it is also their default address.

A third contact person at Gatecom, David Costello, has no link to this address.

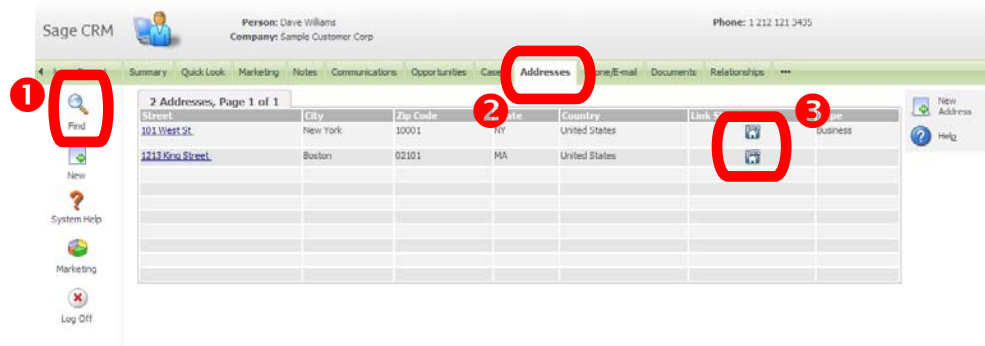
What does Link Status mean?


The Link Status icon shows as either multi-linked  or single-linked .

Multi-linked means the address is linked to more than one person or company. Changes to multi-linked addresses have an effect on all records linked to that address. For example, if a company purchases new office space and moves most, but not all of their employees to that new address, the address Links page can help you view current relationships and establish links to the new address.

Single-linked means the address is linked to one person or company. Examples include: a person's home address is not linked to anyone other than the current person; a company's PO Box address is linked to the company, but not to any person records.

To view the link status icons:



- 1 Select Find | Person and click on the hyperlink of the person's name. For example, David Costello of Gatecom.
- 2 Click on the Addresses tab within the context of the person, and add a new address. For example, a home address for David Costello.
- 3  The new address is displayed in the list of addresses for the person with a Link Status of single-linked.

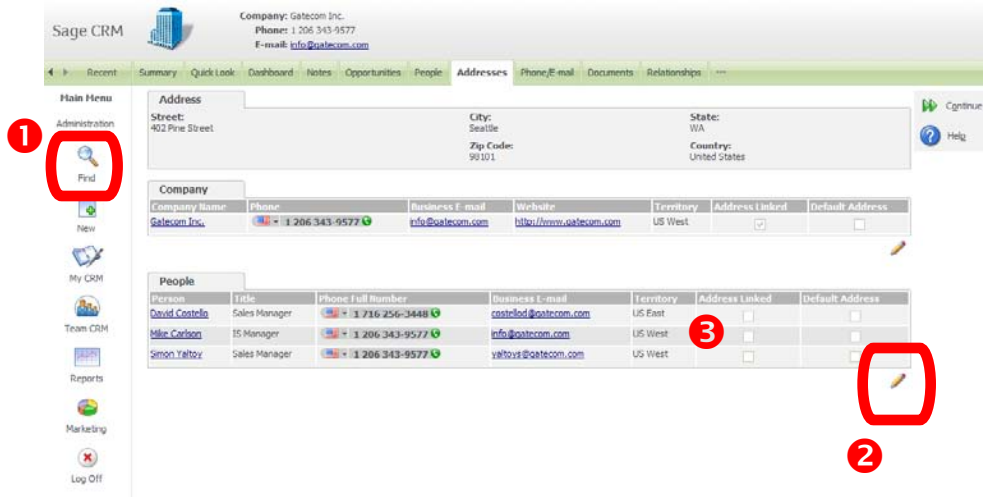
Clicking on the Link Status icon shows that this address is linked to the person, but has no link to either the company or any other person.

How do I maintain the address relationships?

You can make changes to the relationships between people, companies, and addresses from the Address Links page of the affected address.

For example, a company has a new mailing address. This new mailing address will affect some, but not all, of the company's employees.

To set up the links between the new address and existing contact people:



1 Select Find | Company and click on the hyperlink of the company name. For example, Gatecom.

Click on the Addresses tab within the context of the company, and add a new address. The new address is displayed in the list of addresses.

Click on the link status icon next to the new address. The Address Links page for the new address is displayed.

2 Click on the pencil icon next to the list of people.

A new window is displayed, where you can edit the links and default relationships.

In this example, select the Address Linked check box for Mike Carlson and Simon Yaltoy, and save.

3 The new relationships are displayed on the Address Links page.

In this example, you can navigate to the people you have set up the links for and check that: their default address remains the same; and a new address is displayed in the context of the person showing a Link Status of multi-linked.

Where can I get more information?

More information on this feature is available in the:

- *User Guide*

Chapter 6

Enhanced Solo Filtering

The following enhanced Solo Filtering functionality is available in version 7.0:

- Administrator-defined Centralized Solo Profiles.
- End user defined profiles (limited to using the profile defined by the System Administrator).
- Better performance due to fewer records being synchronized.

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

Who can I log on as?

To set your own solo profile, you can log onto CRM as a standard user.

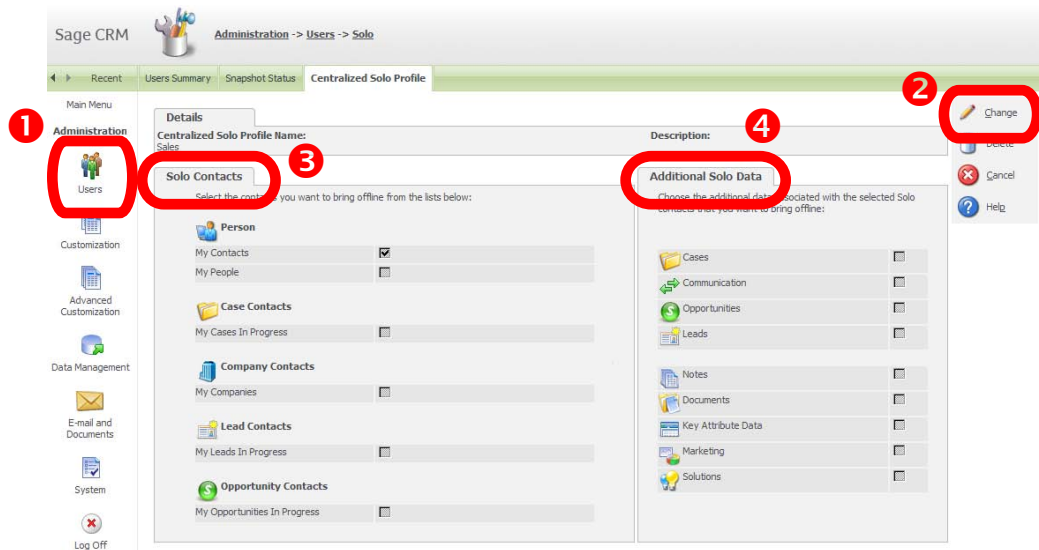
To define new centralized profiles, you can log onto CRM as an admin user.

How can I improve download times for my Solo users?

You can define centralized profiles for your Solo users, which tailor the information users pull down from the server to the type of role they perform. Providing a custom reduced set of data for users to pull down should cut download times significantly.

For example, you can assign members of your sales team to a centralized Sales Team profile, which pulls down data specific only to Sales, such as My Contacts, My People, My Companies, My Opportunities, Communications and Notes.

To define a centralized solo profile:

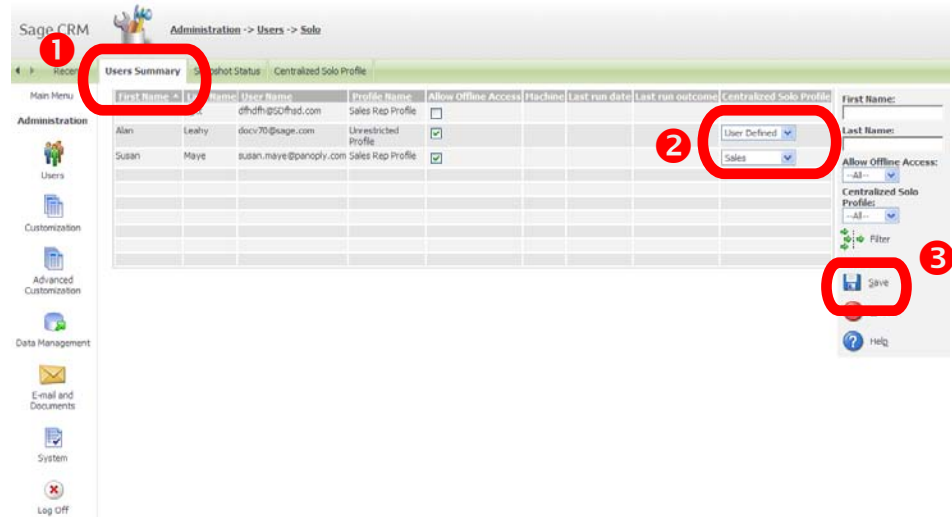


- 1 Go to Administration | Users | Solo and click the Centralized Solo Profile tab.
On the Centralized Solo Profile tab, you can create a new centralized solo profile or select the hyperlink of an existing Centralized Solo Profile.
- 2 To set new profile attributes or modify an existing profile, click the Change button.
- 3 In the Centralized Solo Profile Details page, you can select the contacts you want users to be able to bring offline.
- 4 You can also select any additional data that you want to have associated with the selected Solo contacts that you want to bring offline.

How do I assign a Centralized Solo Profile to a Solo user?

When selecting which users you wish to have offline access, you can assign them to defined profiles.

To assign a profile to a user:



- 1 Select Administration | Users | Solo | Users Summary tab, and click the Change action button.
- 2 All profiles are set to a default of "User Defined".
Assign users to profiles that you have defined by selecting them from the drop-down list in the Centralized Solo Profile column.
- 3 Select the Save button.

Where can I get more information?

More information on this feature is available in the:

- *Solo Guide*

Chapter 7

Quote and Order Enhancements

The following new quote and order functionality is available in version 7.0:

- Customize Quote and Order Item grids.
- Message is displayed when converting an expired quote.
- Open the summary of a quote or order from a group list using the Reference hyperlink.
- Access quotes and orders from the Recent list – even if no description has been added.
- Create a new quote or order template during a quote or order merge.

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

Who can I log on as?

To customize quote and order grids you can log onto CRM as an admin user.

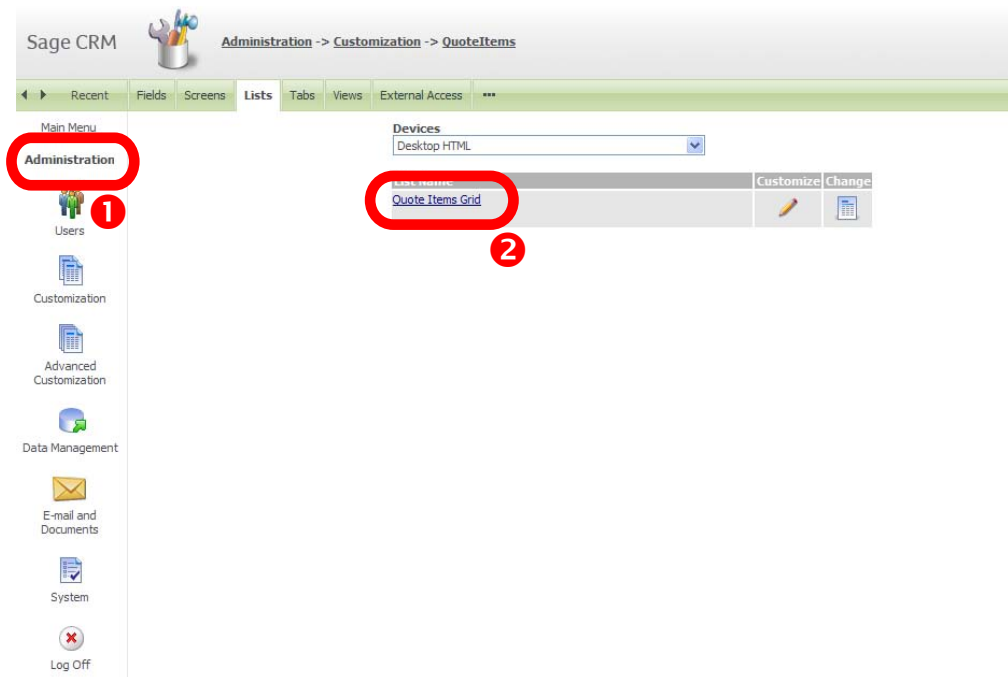
For all other quote and order enhancements you can log onto CRM as a standard user.

Can I remove the list price from the Quote Items Grid?

Yes. You can change columns on the Quote and Order Items grids.

Note: It is recommended that the first four columns (Line #, Synch Status, Line Type, and Product Name) are maintained in their current state. Making changes to any of the columns should be carried out with care.

To customize the Quote Items Grid:



1 Select Administration | Customization | Secondary Entities | Quote Items | Lists.

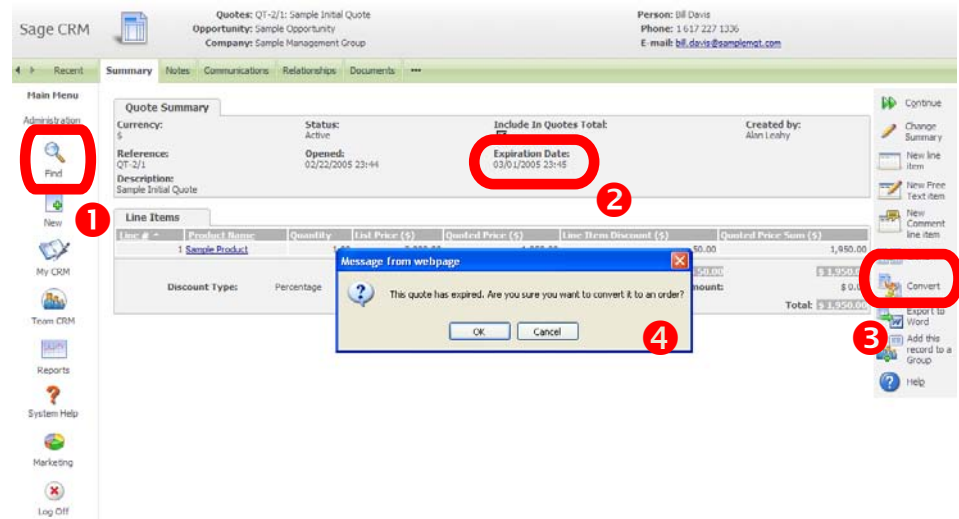
2 Click on the hyperlink of the Quote Items grid.

The Maintain List Definition page is displayed, where you can make changes to the columns. To change the Order Items grid, follow the same procedure, selecting Order Items from the Secondary Entities drop-down.

Can I convert an expired quote to an order?

Yes. The Convert (to order) button can be selected even if the quote has expired, however a message is displayed to the user.

To convert an expired quote to an order:

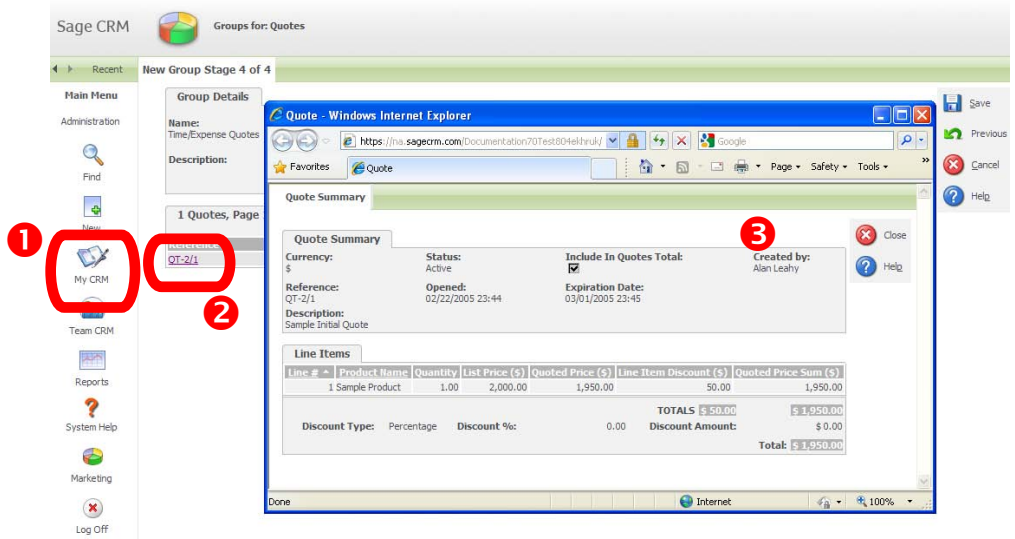


- 1 Select Find | Quote, and click on the hyperlink of the quote.
- 2 Check the Expiration Date.
- 3 Select the Convert button to convert the quote to an order.
- 4 A message is displayed to the user.

Can I open quote or order details from a Group list?

Yes. You can open the quote or order summary by clicking on either the Reference link or the Description link of the quote or order.

To open the details of a quote from a group list:

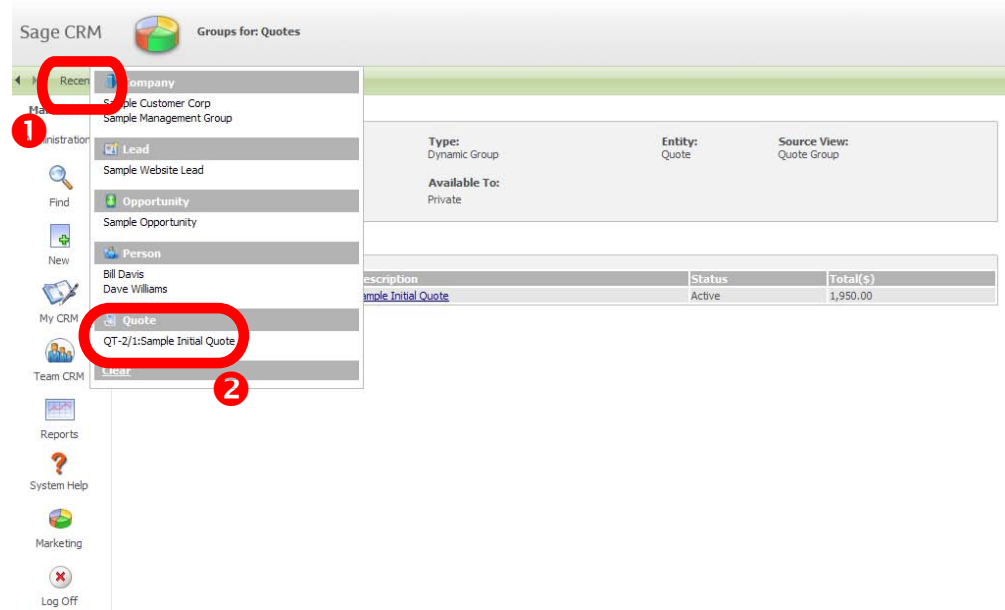


- 1 Select My CRM | Groups, and create a new group using based on the Quote entity.
- 2 Click on the Reference hyperlink of one of the quotes.
- 3 The Quote Summary page is displayed in a new browser window.

Do quotes and orders appear in the Recent list?

Yes, quotes and orders appear now appear in the Recent list.

To access a quote from the Recent list:



1 Select the Recent list button.

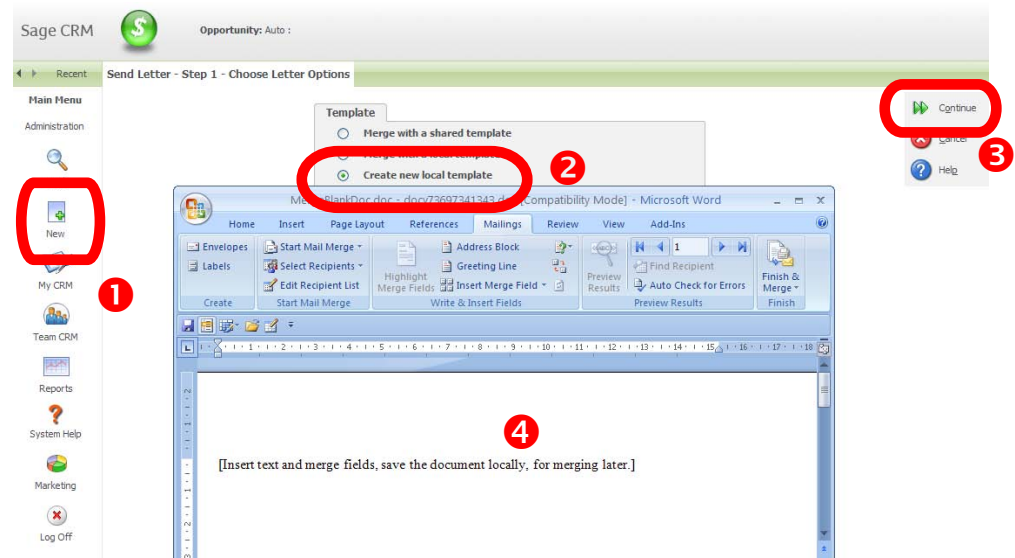
2 Click on the Quote you want to jump to.

Note: Quotes and orders appear in the “web picker” in a similar format. For example, select New | Appointment, and select Quote in the Regarding field. The list returned shows the quote reference and description columns.

Can I create a new quote template during a quote merge?

Yes. The Create New Local Template option is available during the quote or order merge process.

To create a new template during a quote merge:



- 1 Select New | Quote. Fill in the details, add your line items, then select Export To Word.
- 2 Select Create New Local Template.
- 3 Click Continue.
- 4 The MergeBlankQuote.doc document is displayed. This can be edited, saved, and the merge completed.

Note: You may be prompted to download the new document plugin the first time you do this. Follow the on-screen instructions to complete the plugin download.

Chapter 8

More Features

The following additional features are new to CRM:

- Monthly calendar start date.
- New format in-product help.
- CSV File Export Delimiter settings.

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

Who can I log on as?

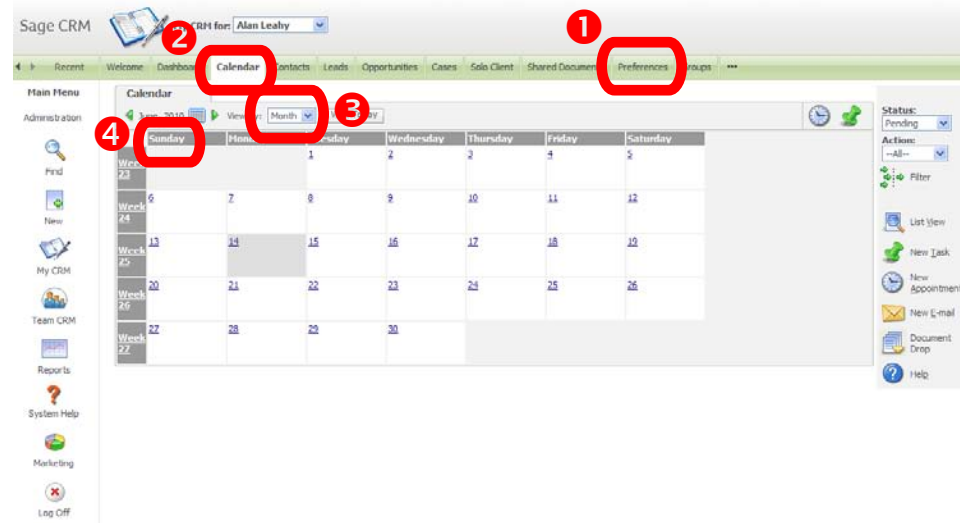
To change calendar settings or view in-product help you can log onto CRM as a standard user.

To change the CSV File Export Delimiter settings you can log onto CRM as an admin user.

Can I change the day on which my week starts?

Yes. Existing functionality allows users to set the day of the week on which their week starts, and any changes made are reflected in the weekly view. In 7.0 this change is also reflected in the monthly view.

To see the day on which your week starts in the monthly view:

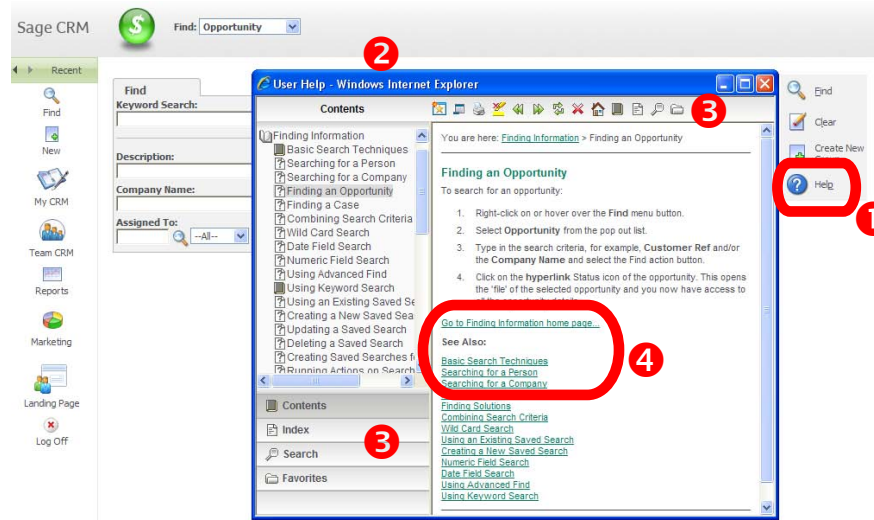


- 1 Go to My CRM | Preferences and click the Change action button. In the Date/Time Preferences panel, change the day to the day your week starts in the My week starts on drop-down list to Sunday and click Save.
- 2 Navigate back to the Calendar view.
- 3 In the View by drop-down, change the view to Month.
- 4 The change you made on the Preferences screen is reflected in the weekly and monthly calendar view.

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:



- 1 Click on the Help button from anywhere within the Main Menu or Administration areas.
- 2 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.
- 3 Contents, Index, Search, and Favorites are available from either the concertina-style navigation pane or from the help toolbar.
- 4 “Go to..” and “See Also” links are available from the help topic.

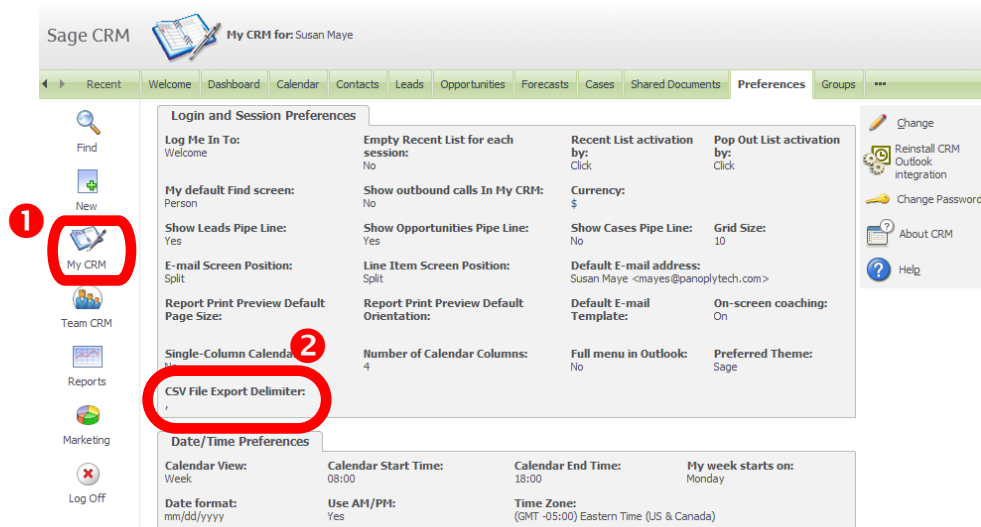
Other changes to note:

- 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:



- 1 Select My CRM | Preferences.
- 2 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.

Where can I get more information?

More information on these features is available in the:

- *User Guide*
- *System Administrator Guide*

