

Sage CRM

Sage CRM 7.2

What's New Guide



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.

Sage CRM 7.2 Release Snapshot

- Drive employee collaboration and knowledge exchange
- Increase employee engagement through shared information
- Facilitate peer-to-peer learning through quick and easy collaboration
- Instant information about customers and prospects using Social CRM
- Obtain more relevant information for greater assessment of your opportunities
- Enhance mobile sales team productivity with two new sales apps
- Sage CRM Sales Lite for iPhone delivers up-to-date information on the road, even when out of coverage
- Sage CRM Sales Tracker for Windows 8 gives users access to company, person and opportunity records from their Windows 8 device
- Faster, secure, customised reports, quickly populated with the latest CRM information.
- At-a-glance business insight and informed decision-making



Stay connected to your business with real-time mobile access using Sage CRM's native sales apps for the iPhone and Windows 8 devices

Business Collaboration powered by Yammer

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

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.

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 watch list of 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

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

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

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.

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 and start your free 30 day trial of Sage CRM now.

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