

Accelerate your business performance



What's new

The latest release of Sage CRM integrated to your Sage accounting solution offers extra features to improve your sales, marketing and customer service.

This new release includes the following key features:

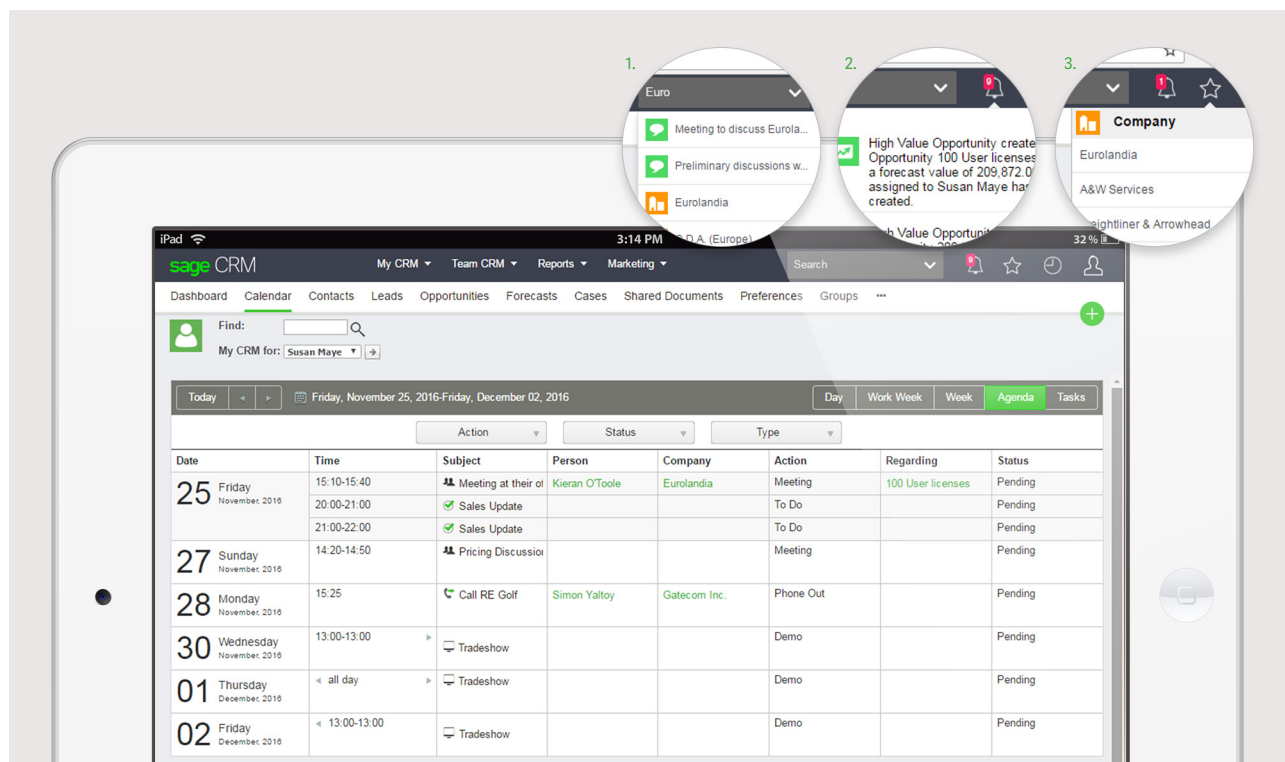
- **Enhanced calendar:** The redesigned and intuitive Sage CRM calendar makes it easier for you to manage your important meetings and appointments.
- **Updated top bar:** The top bar provides quick and easy access to search features including your favourite records, active notifications and recently viewed records.
- **New Quick Find:** The new search functionality offers quick and easy access to customer information.
- **Secure email connection:** The latest update allows you to securely access mail services such as Exchange Online and Gmail directly from within the Sage CRM product, without the use of other software.

Enhanced calendar

In this latest release, the updated calendar showcases an intuitive design with a modern look and feel making it easier for you to manage your important meetings and appointments. Your integrated CRM solution includes a complete revamp of the calendar, offering easier access to your agenda, tasks and appointments so you and your teams can be more efficient.

Key highlights include:

- **Enhanced user calendar:** You can easily switch between day, week, and work week views with detailed information about your tasks and appointments enabling you to personalise your calendar view to suit your needs.
- **Improved team calendar:** Stay up to date with your teams' appointments and tasks with the enhanced team calendar view.
- **New agenda view:** We have added a visually compelling agenda view so you can now easily manage your tasks and appointments on one list.
- **Improved navigation buttons:** Improvements to the navigation buttons enable you to quickly move between days or weeks in the calendar.
- **Separate tasks view:** Tasks are now available on their own tab for easier access.



Discover your improved calendar, and new navigation features: new Quick Find (1), improved Notifications (2), and new Favourites feature (3).

Optimised navigation and search

As part of this release we have updated the top navigation bar so you can easily search for and access your favourite records, active notifications and recently viewed records.

The latest updates include:

- New Quick Find:** Quick and easy access to customer information is essential to providing first-class service. Enable your teams to address customer issues faster than ever before with the new Quick Find feature. You can now:
 - Enter key terms in the Search bar to see the top 8 matches of your search
 - Search across the entire application at once including standard and custom entity records.

- Improved Notifications:** Stay up to date with important tasks, appointments, workflows and systems alerts with the latest update to the notifications feature. Simply click on the icon to display all your active notifications.
- Enhanced Recent list:** Easily expand and collapse your Recent list to view records quickly and easily.
- New Favourites feature:** Quickly view the information that is important to you with the latest display update. Click the new icon to view a list of your favourite items.

For full details please see the release notes [here](#), and for further information visit the [Sage CRM Help Center](#).

The above information relates to the Sage CRM 2017 R1 release. Please contact your authorised Sage business partner or local Sage office for information on availability of these features within your integrated CRM product.