

Elevate your business performance



What's new

The latest release of Sage CRM integrated to your Sage accounting solution offers extra features to help you manage your customer relationships across the sales, marketing and customer service areas of your business.

This new release includes the following key features:

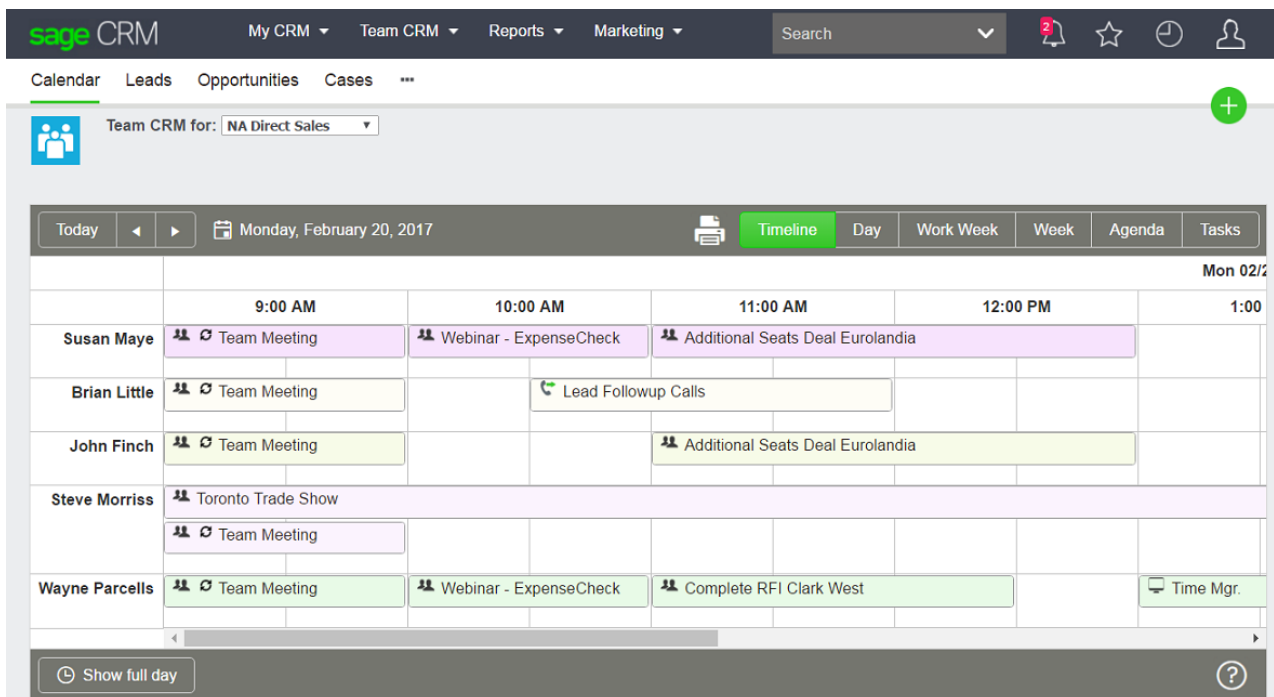
- **User calendar and team calendar updates:** The upgraded Sage CRM user calendar and team calendar have some great new features making it easier for you to plan your important meetings and appointments.
- **Email address auto-suggest:** Quickly access the email address you need with the auto-suggest and matching capability now standard in the product.
- **System Health monitor:** Ensure that all areas of your Sage CRM system are up and running with this simple system health monitor page in the administration area.
- **User Email Signature:** All users can now quickly and easily set up an automatic email signature for their emails sent using the built in email editor. This feature speeds up the email creation process, while achieving a consistent look for customer communications.

Additional calendar functionality

In this latest release, the calendar includes new functionality to make it easier for you to manage your schedule and helps you effectively manage your team members' time.

Key highlights include:

- **User calendar:** The user calendar now includes a Month view, allowing you to plan your schedule in the most efficient way.
- **Printable calendars:** All calendar views are now printable, allowing you to easily generate a hard copy of your schedule.
- **Timeline view:** The new Timeline view on the team calendar allows you to quickly and easily assess the availability of your team for meetings each day.
- **Team calendar with user colours:** All events on the team calendar views are now coloured per user to allow you easily distinguish which meetings individual users are scheduled to attend.
- **Improved calendar performance:** Enhancements have been made to optimise the performance of the calendar allowing users to maximise their productivity.



The new Timeline view on the team calendar allows you to quickly and easily assess the availability of your team members for meetings each day. In addition, all of the Team calendar views show events coloured per assigned user.

Additional Sage CRM 2017 R2 Release Features and Support

Sage CRM 2017 R2 adds a host of additional features and functionality designed to enhance your user experience and to help you manage your prospects and customers.

The latest updates in this release include:

- **Custom Entity List Optimisation:** Sage CRM systems with custom entities added in to the system have a new option in the list definition area designed to boost system performance through optimised query building.
- **MailChimp API update:** With this release, Sage CRM now uses the latest API from MailChimp, ensuring you can continue to monitor your email marketing campaign performance. All existing MailChimp campaign data is retained. Customers using MailChimp in Sage CRM v7.3 or Sage CRM 2017 R1 can apply a patch to ensure that the MailChimp feature in those Sage CRM versions uses the new API.
- **Additional Platform Support:** The 2017 R2 release of Sage CRM adds support for the latest database and browser versions, including support for Microsoft SQL Server 2016 SP1 as well as adding support for Apple Mac OS versions 10.11 and 10.12 and Safari browser versions 9 and 10.
- **Upgrading to Sage CRM 2017 R2:** You can directly upgrade to Sage CRM 2017 R2 from any released version of Sage CRM v7.2, Sage CRM v7.3 or from Sage CRM 2017 R1.
- **Integrated Sage CRM system upgrades:** Customers using Sage CRM integrated to a Sage accounting solution should check with your Sage authorised Business Partner regarding the compatibility and availability of this release for your integrated system.

For further information on this release, please visit the [Sage CRM Help Center](#).