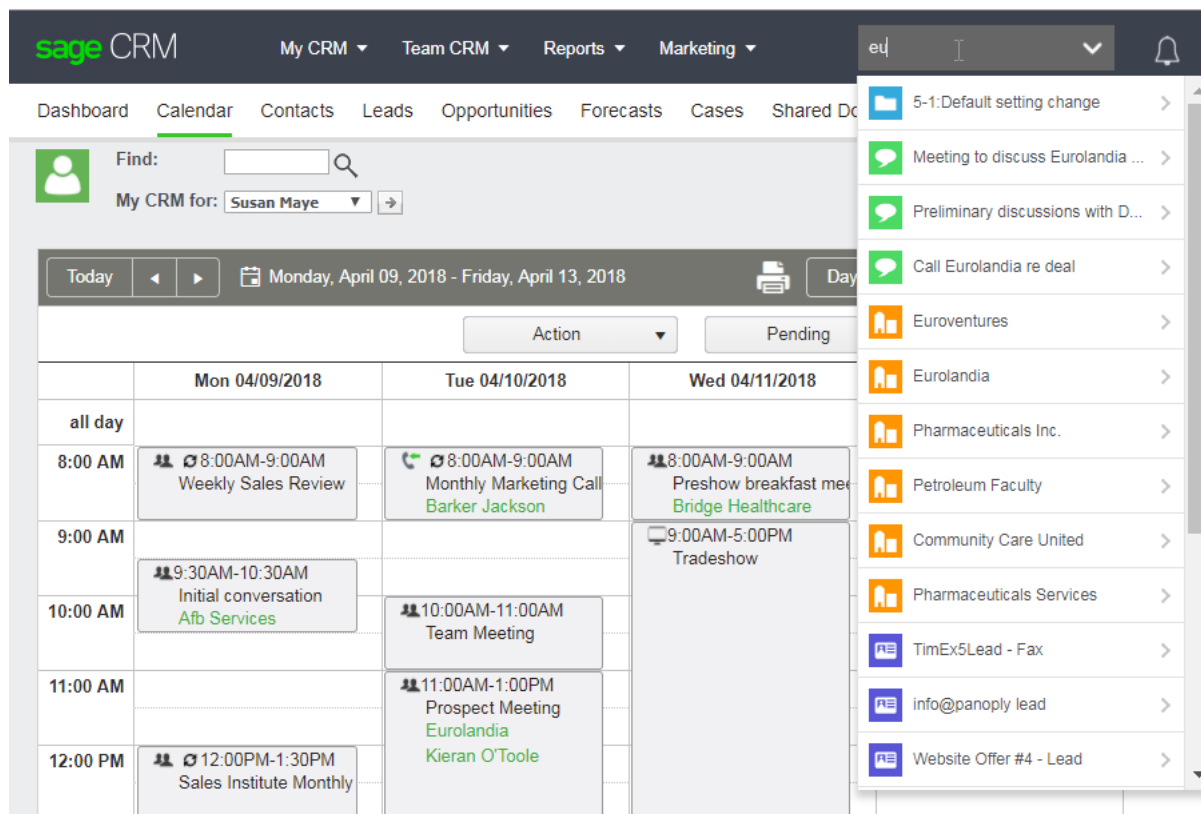


Sage CRM 2018 R2 - What's New

The 2018 R2 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 a set of features designed to help your organisation with the management of personal data stored in Sage CRM as well as updates to features including Calendar and Quick Find to ensure even greater usability.



Consent for marketing in Sage CRM

Legislation in your region may require you to obtain consent from your Sage CRM contacts for permission to market to them. Sage CRM 2018 R2 has added a simple consent tracking capability, allowing you to issue consent requests to contacts and to store their consent responses against their contact record.

Consent can be recorded for multiple types of campaign. Sage CRM 2018 R2 includes email templates that contain embedded links allowing recipients to click to grant or withdraw consent. These responses can be automatically tracked in Sage CRM.

Managing personal data shared with external services

Company or Person records in Sage CRM that have been shared with the MailChimp or Swiftpage email marketing services are flagged automatically. These records would need to be manually removed from those applications if implementing a right to be forgotten request.

Quick Find

The Sage CRM Quick Find functionality allows you access the information you need as quickly as possible. The maximum number of on-screen results returned by Quick Find can now be configured in the administration area.

Quick Find results now include data contained in multi-line text fields. Results from Quick Find have been optimised to provide better relevancy scoring on results.

sage CRM My CRM Team CRM Reports Marketing Search 10

Summary Quick Look Marketing Communications Opportunities Cases Addresses Phone/E-mail Documents Consent More

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1 Consent record(s), Page 1 of 1

Created	Contact Via	Contact Purpose	Status	Requested	Last Email Link Response
12/02/2018 10:00	Email	E-marketing materials	Consented	12/02/2018 10:30	13/02/2018 16:32

New Help

You can now issue requests for consent to market to your prospects and customers, and store responses received in Sage CRM

Additional Sage CRM 2018 R2 Release Information

Sage CRM Calendar

The Sage CRM user and team calendars now default to filter by status Pending in all of the calendar views. In addition, calendars can be filtered by communication action. Changes to filters persist for the duration of your Sage CRM session.

MailChimp results

Mailchimp results are now available on the Person and Company Marketing tabs, detailing MailChimp email marketing campaigns where that record has been included and showing a count of emails opened and links clicked.

Main menu display on narrow screens

The main menu is now optimised for long item names and narrow screens. A user preference setting of Always or Automatic determines how the main menu is displayed. On narrow screens the main menu appears as a three horizontal line clickable icon.

Deleting communications or documents from Sage CRM

You can now remove all of the communications you had with a specific person or lead in your Sage CRM system. It is also possible to mass delete communications and documents for Person and Lead groups in Sage CRM. This feature is available to administrator level users only.

Additional platform support

The 2018 R2 release of Sage CRM adds support for the Microsoft SQL Server 2017 database.

Upgrading to Sage CRM 2018 R2

You can directly upgrade to Sage CRM 2018 R2 if your existing system is Sage CRM 2018 R1 or if it is any of the Sage CRM 2017 versions.

If you use Sage CRM integrated to a Sage accounting solution, please check with your Sage authorised Business Partner regarding the compatibility and availability of this release for your integrated system.

