

What's New in Sage CRM v7?

Sage CRM v7 Overview

More than ever, businesses are focusing on becoming process efficient and looking for ways to make their staff more productive. Sage CRM v7 delivers on these goals with a brand new interactive dashboard and other productivity-enhancing features. Sage CRM prides itself on its ease-of-use, ease-of-customisation and its fast, flexible deployment. The new features in Sage CRM v7 boost user productivity, drive CRM adoption across the organisation and further enhance the user and owner experience significantly.

Sage CRM v7 revolutionises how you manage your business and how your employees manage their day, thanks to the new **Interactive Dashboard**. The interactive dashboard delivers a rich and personalised user experience that boosts productivity and helps drive user adoption across the business. With the Sage CRM interactive dashboard, users can now manage all their activity from one place. This includes their calendar, their tasks, their lists as well as displaying web and RSS feeds, driving productivity throughout your organisation and enabling your staff to accomplish more from a tailored workspace that combines the information they use every day.

The interactive dashboard enables users to define their own personalised and intuitive workspace from a series of gadgets and web feeds ensuring that all content is relevant to their needs, enhancing the user experience and maximising the productivity of your staff. Using innovative drag and drop functionality, users can quickly and easily personalise the layout and the information displayed on the interactive dashboard, delivering an intuitive and convenient way to view and action items and reducing the need to switch between screens.

To further enhance the user experience, Sage CRM v7 comes with a **New Look User Interface (UI)**, delivering a fresh, modern look and feel. Sage CRM comes with a choice of UIs, enabling the user to personalise the look and feel of Sage CRM to their own preference, driving user adoption across the organisation.

Sage CRM is now even faster to deploy with our new **Active Directory Import** feature in Sage CRM v7. This valuable feature enables businesses to set users up quicker by enabling the simple import of users into Sage CRM from your Windows® network. Facilitating standard network logons in Sage CRM increases the productivity of the IT department and reduces administrative overhead.

Sage CRM v7 is easier to use, deploy and customise than ever – from how users logon, to what users see on their dashboard; from how users manage their activities, to the look and feel they choose to display on their interface.

SAGE CRM V7 BENEFITS SNAPSHOT

The new look and feel of Sage CRM v7 makes it easier to use and offers greater choice of interface designs, delivering greater personalisation options and helping drive user adoption across the organisation

The **interactive dashboard** enables users to manage their activities and tasks and display web and RSS feeds from a single workspace, driving productivity throughout the organisation

Customised workspaces for teams can be created to ensure that the content is appropriate to their needs, delivering maximum flexibility and usability across the organisation

Personalised workspaces can be created by individuals and content and layout can be customised for a rich, personalised user experience

Staff can accomplish more thanks to a tailored workspace that combines the information they use the most every day

The interactive dashboard delivers an **intuitive and convenient way to view and action items** from a single screen, reducing the need to switch between screens for maximum productivity

Pre-installed dashboards by role for Sales, Marketing, Customer Service and Management are available out-of-the-box providing relevant content for each department on their desktop when they logon

RSS and website feeds deliver relevant and powerful content such as news headlines, blogs, news monitoring services and content summaries straight to the interactive dashboard. This allows users to opt-in to feeds that are relevant to their role

Users can tap into the endless possibilities of social networking for instant knowledge about customers and networking opportunities through out-of-the-box integration with LinkedIn®. Users can extend this to other social media sites thanks to the website gadget on the interactive dashboard

Users can get up and running quicker with the active directory import feature which imports users through a Windows® network to ensure rapid deployment

Sage CRM v7 delivers increased IT productivity as well as a reduction in administrative overhead, as logons are standardised across the network ensuring ease-of-logon for users

The Interactive Dashboard

The screenshot displays the Sage CRM Interactive Dashboard interface. At the top, there's a navigation bar with tabs for Recent, Welcome, Dashboard, Calendar, Contacts, Leads, Opportunities, Forecasts, Cases, Shared Documents, Preferences, and Groups. Below this is a toolbar with options like Select Dashboard, Modify Dashboard, New Dashboard, and Templates. The main workspace is divided into several panels:

- Sage CRM Ecosystem:** A large panel featuring a quote: "I use Sage CRM to effectively manage my customer prospects" and a photo of a man.
- Useful Sales Resources:** A panel with a link to SalesResources.co.uk and sections for Resources, Articles & Tips, Sales Videos, Free Newsletter, and Sales Jobs.
- In Progress Sales Opportunities:** A table listing sales opportunities with columns for Company, Person, Description, Stage, and a list icon. The table shows several entries with details like "Design Rig...", "Eurolanda...", "Gatecom L...", "Harob Co...", "Maverick P...", and "Maverick P...".
- Opportunities Closing this ...:** A horizontal bar chart showing the number of opportunities at different stages: Deal Lost, Lead, Negotiating, Qualified, Proposal Submitted, and Sale Agreed. The x-axis represents the Forecast in thousands of pounds (£).
- My Quick Links:** A panel with icons for Find Opportunity, Create Quote, Team Opportunities, Eco System, Create Lead, and Find Contact.
- My Daily Calendar:** A calendar view for the date 12/16/2009, showing time slots from 08:00 to 10:00.
- Opportunity Details:** A detailed view of a specific opportunity, showing fields like Certainty%, Team, Stage, Priority, Close Date, Type, Description, Opened, Forecast, Source, and Details.
- My Lists:** A list of various opportunity-related lists such as Opportunities By Forecast, Opportunities by Territory, Opportunity Status by Rep, Opportunity Tracking, and Opportunities Closing this Quarter.
- Sage CRM Community (1):** A panel displaying a community article titled "Add/Subtract Days to a Date and pass to a Record Object" with a date of 14th April 2009.

Boost the productivity of your staff and your business with the Sage CRM Interactive Dashboard.

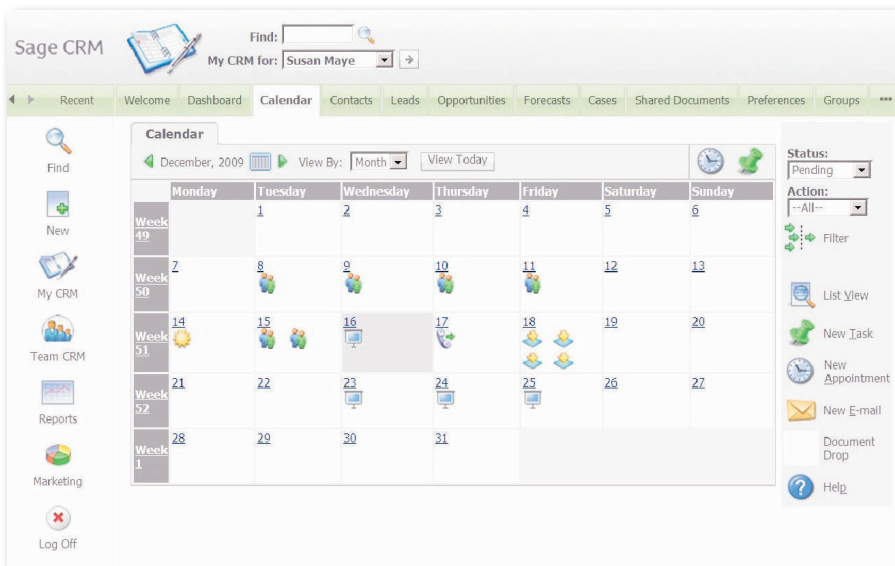
Want to get more done in your day and boost the productivity of your staff? Now you can with the Sage CRM Interactive Dashboard. The interactive dashboard is an intuitive and customisable workspace from which users can co-ordinate and manage their daily tasks and activities. Built on leading-edge AJAX web technology, information can be displayed and personalised based on user preferences and the layout can be easily customised thanks to its drag and drop capabilities. The interactive dashboard pulls information and feeds from within Sage CRM, external websites and integrated Sage ERP systems in real-time so users have all the information they need at their fingertips, without the need to switch screens.

The interactive dashboard delivers a rich, user-driven workspace and experience

- Enables users to control and action activity from a single workspace
- Enables users to customise the layout of dashboard gadgets using drag and drop capabilities
- Comes with a library of pre-installed roles-based dashboards for Sales, Marketing, Customer Services and Management to deliver relevant content and immediate productivity gains to users and teams
- Offers businesses the option to create dashboard templates for each department, individual or group of individuals for maximum flexibility
- Enables users to manage their sales pipeline, check stock control from integrated Sage ERP systems, monitor industry news, manage their calendar and tasks, and monitor leads all from the same screen in real-time
- Integrates with LinkedIn®, offering users powerful networking opportunities
- Surfaces websites directly on to the dashboard through a website gadget, maximising relevant content
- Delivers users with a direct link to the Sage CRM Ecosystem of product add-ons and community forums for ease-of-use
- Empowers businesses with a single view of relevant and comprehensive information for informed decision-making
- Enables users to define their own personalised and intuitive workspace ensuring that all content is relevant and appropriate to their needs
- Enhances the user experience and maximises the productivity of staff

Boost productivity in your organisation with the Sage CRM Interactive Dashboard – an intuitive and customisable workspace from where users can manage all their daily tasks and activities

New Look and Feel



Sage CRM users can choose from three fresh user interface designs based on their preferences:

- Sage
- Neutral
- Classic

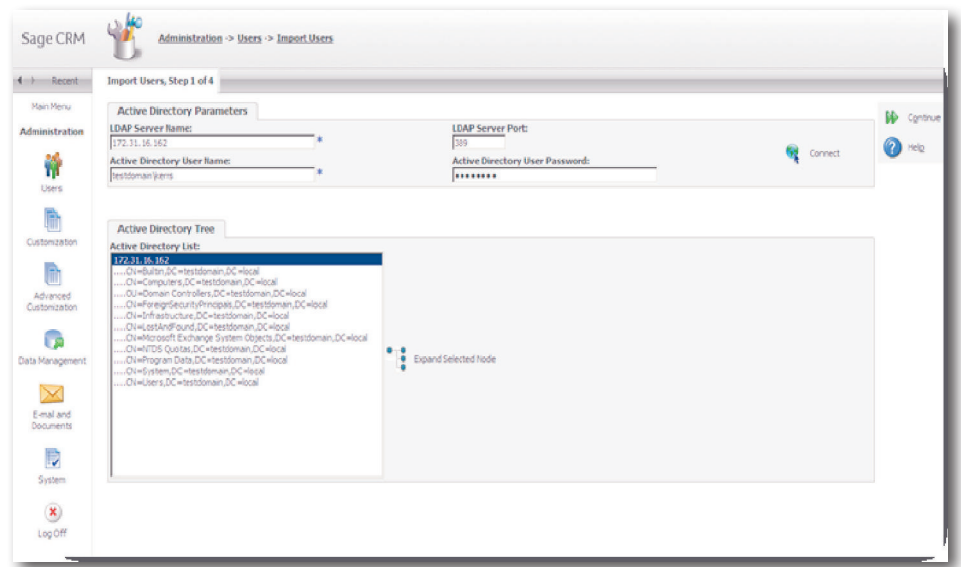
Personalise the look and feel of your workspace

A new interface design has been launched with Sage CRM v7, delivering more options to users who wish to personalise Sage CRM.

The fresh new 'Sage' interface has been designed to complement the existing pre-configured user interface designs. This broader choice enables users to personalise Sage CRM based on their preferences, providing them with a customised user experience.

This added choice, coupled with the easy-to-use layout and navigation, helps drive user adoption across the organisation for maximum RoI.

Active Directory Import



Get users up and running faster with the active directory import feature.

This new Active Directory import feature in Sage CRM v7 allows IT administrators to import a batch of users from your Windows® network into Sage CRM quickly and easily. This speeds up deployment time by enabling administrators to get users up and running faster.

User templates can be applied and passwords can be emailed quickly and efficiently to users through Sage CRM. Businesses can keep standard logons across the network which increases IT productivity and reduces administrative overheads.

With the Active Directory import feature, Sage CRM can connect to an Active Directory server that lists and controls network logons. Those users within the directory are then not only filtered and imported easily into Sage CRM but also have security, and profile rights automatically assigned to them.

Sage CRM streamlines the complex task of getting users up and running and eliminates multiple logons for users

About Sage CRM

Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams 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.

The Sage Difference

- The leading supplier of SMB business applications in the world*
- Over 5.8 million customers
- Over 14,500 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 26 countries
- Relationships with over 40,000 accountancy practices
- 28 year's experience
- Over 3.1 million Sage CRM Solutions users worldwide

*Source: AMR Research, 2009, The Global Enterprise Application Market

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