

## Sage CRM 2018 R1 - What's New

The 2018 R1 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 updates to the Sage CRM Calendar, and a host of features designed to make the solution even easier to use as you grow your business and manage your customer relationships.

Date	Time	Event	Person	Company	Action	Status	Complete
01 Friday December, 2017	4:00 PM	✓ Check in with Susan - forecast			To Do	Pending	<input type="checkbox"/>
04 Monday December, 2017	10:00 AM	✓ Set up lunch with Eurolandia	Kieran O'Toole	Eurolandia	To Do	Pending	<input type="checkbox"/>
08 Friday December, 2017	11:00 AM	✓ Prepare presentation	Daniel Padden	American Gage	To Do	Pending	<input type="checkbox"/>
13 Wednesday December, 2017	8:00 AM	✓ Submit Expenses			To Do	Pending	<input type="checkbox"/>

*The updated Tasks screen in the calendar including Quick Complete functionality, Quick Task creation with attached documents and an automatic filter by Pending, ensuring you can be highly efficient in task management and completion.*

## Sage CRM 2018 R1 Calendar

The calendar has additional functionality to maximise usability and efficiency when managing your user and team calendars, and facilitates rapid task creation with associated documents.

New calendar features in this release include:

### Task Quick Complete

Allows you to complete a task with a single click, ensuring you can easily focus on your remaining tasks. Completed tasks are automatically removed from the screen when filtering by 'Pending'.

### Drag and Drop Calendar Appointments

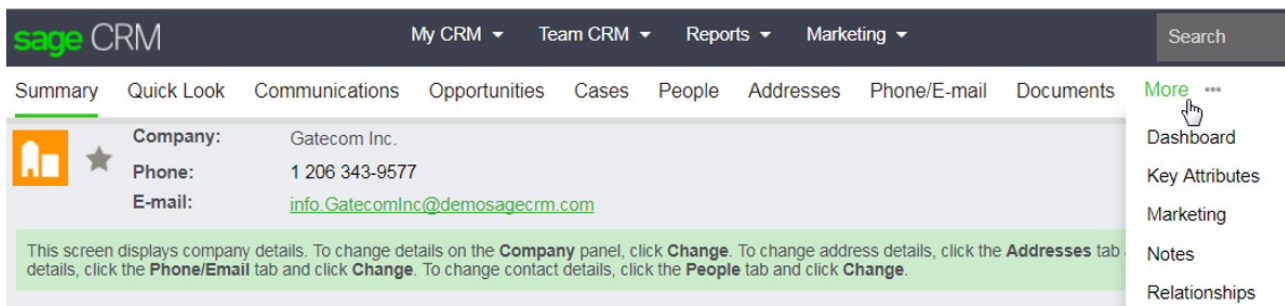
Appointments on the user calendar can be moved by dragging and dropping the appointment to a new time in the Day, Week, Work Week and Month views.

### Calendar Filter by Pending

User and Team Calendars now default to filter by pending in the Agenda and Task views area. Changes to filters persist for the duration of your Sage CRM session.

### Quick Tasks Creation with Attached Documents

You can drag and drop files to the 'Drop files here' area in the Tasks view of the My CRM and Team CRM calendars to quickly create tasks with attachments.



You can now move infrequently used tabs to the More option allowing you focus on the content that matters to you

## Additional Sage CRM 2018 R1 Release Features, Platform Support and Upgrade Information

### Simplified Tabs

You can quickly move tabs into a new 'More' tab option, allowing rapid access to the areas you need for your daily tasks. This is a per user configuration option.

### Quotes and Orders screens

Changes have been made to ensure much greater usability and to eliminate scrolling if you use the standard Quote and Order entry screens.

### Optimised Metadata Refresh

The manual and automatic metadata refresh mechanisms have been optimised in this release ensuring better system performance.

### MailChimp Integration Enhancements

Sage CRM now performs additional automatic checking on the validity of email addresses being sent to MailChimp, as well as detecting duplicate email addresses. Any issues found will appear as a Sage CRM notification

### Numeric Field Separators

Thousand separators are now fully applied to numeric fields in the application. The separator used is determined by the value indicated in your user preferences.

### Additional Platform Support

The 2018 R1 release of Sage CRM adds support for Apple Mac OS X 10.13 and iOS 11. Sage CRM now supports SQL Server Express 2014 64-bit subject to limitations.

### Upgrading to Sage CRM 2018 R1

You can directly upgrade to Sage CRM 2018 R1 if your existing system is any of the Sage CRM v7.3 or Sage CRM 2017 versions.

### Integrated Sage CRM system upgrades

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.

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

