

A close-up, slightly blurred photograph of a person's hands working on a bicycle. The person is wearing a blue shirt and is focused on adjusting a component on the rear of the bike. The background is a workshop setting with various tools and equipment visible. The overall tone is professional and technical.

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# What's New in Sage CRM 2018 R2

- Sage CRM calendar usability
- Quick Find changes
- MailChimp results by person and company
- Main menu optimization for narrow screens
- Gathering and tracking consent for marketing
- Deleting communications and documents for contacts
- Automatic flagging of externally shared data



The Sage logo, consisting of the word "sage" in a lowercase, sans-serif font, is positioned at the top center of the slide. The background of the entire slide features a dark blue, abstract pattern of concentric, wavy lines that create a sense of depth and movement.

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# Sage CRM Calendar

Continued updates to ensure the best usability possible for the feature at the heart of the application

# Filtering on Calendar Screens



sage CRM

My CRM Team CRM Reports Marketing Home

Dashboard Calendar Contacts Leads Opportunities Forecasts Cases Shared Documents Preferences Groups ...

Find:

My CRM for: Susan Maye

Today Tuesday, February 06, 2018

Meeting Pending

Tue 02/06/2018

all day	
8:00 AM	8:30AM call re outstanding bill Design Right Inc. Reg Barrow Susan Maye
9:00 AM	
10:00 AM	10:00AM-12:00PM Brought forward. T-Zone Chemicals Inc Peter Williams Susan Maye
11:00 AM	10:00AM-11:00AM Team Meeting Susan Maye
12:00 PM	
1:00 PM	
2:00 PM	2:00PM-4:00PM Prospect Meeting Eurolandia Kieran O'Toole Susan Maye
3:00 PM	

- Filtering by Action and Status added to Day, Work Week, Week and Month views
- Filters are retained for the duration of session
- Default filter is Pending on screen

# Calendar uses preferred date format



	Mon 12/03/2018
all day	

	Mon 03.12.2018
all day	

	Mon 2018.03.12
all day	
...	

	Mon 12.3.2018
all day	

- Calendar now displays dates according to the setting in the user preferences area





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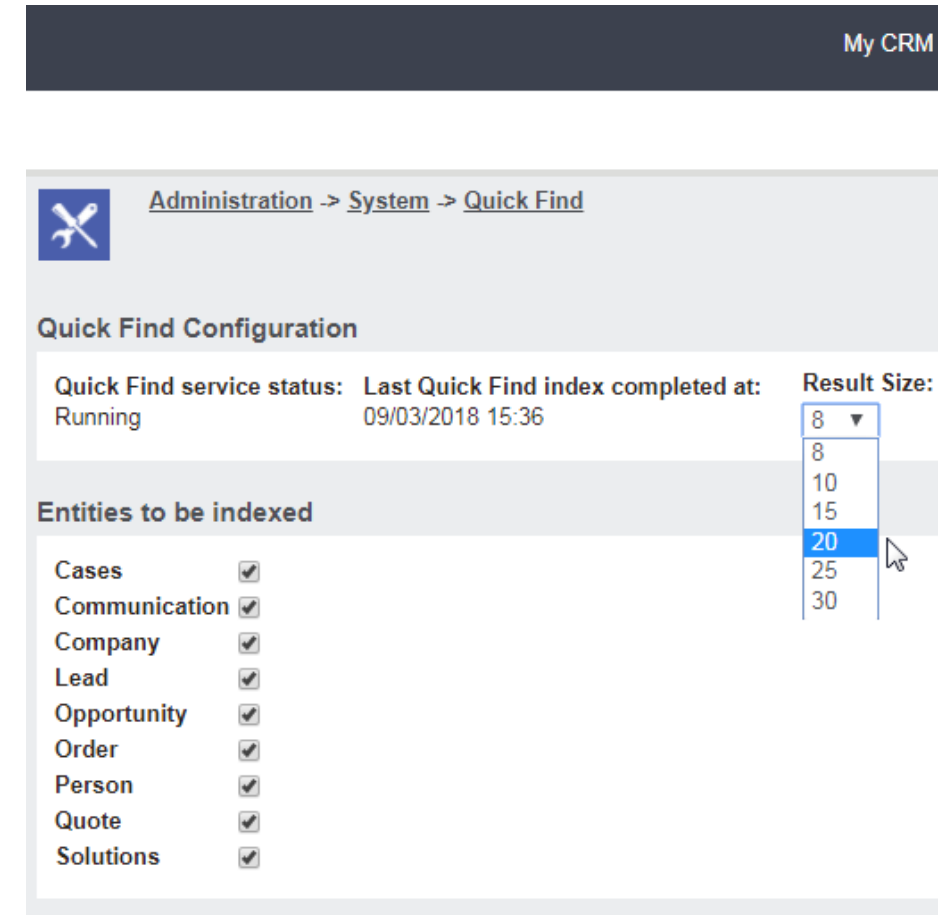
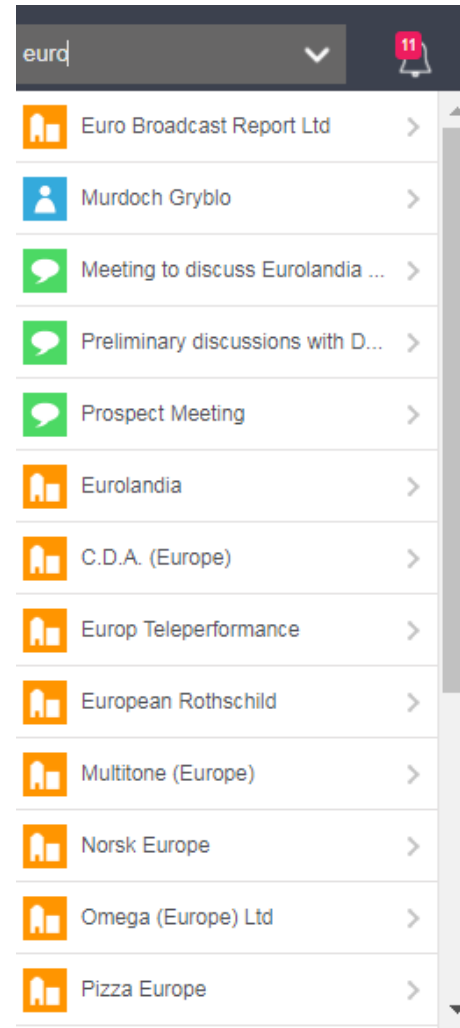
# Quick Find

Accessing the information you need as fast as possible

# Quick Find configurable results length

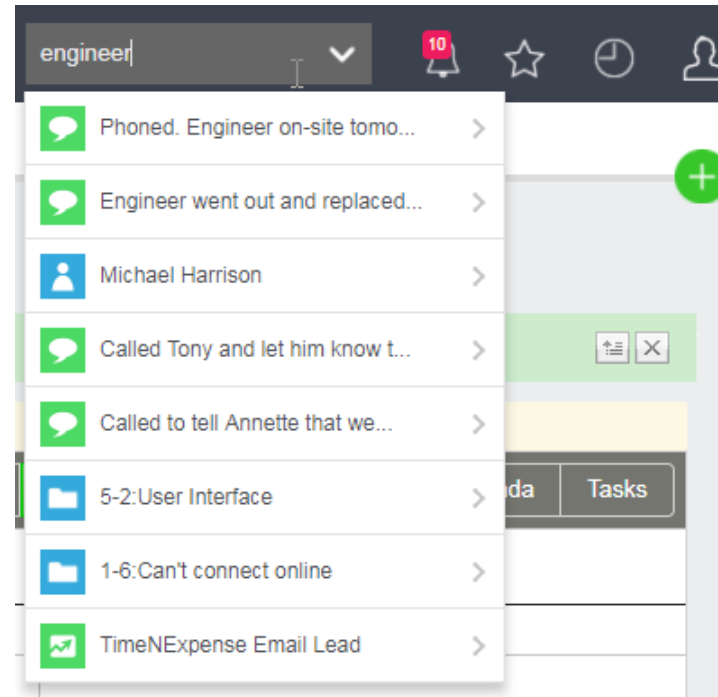


- Maximum number of on-screen results returned by Quick Find can now be configured
- System wide maximum value for all users is set in Quick Find configuration area
- Results appear as a scrollable list



# Quick Find – Multiline Text fields

- Quick Find results now include data contained in multi-line text fields

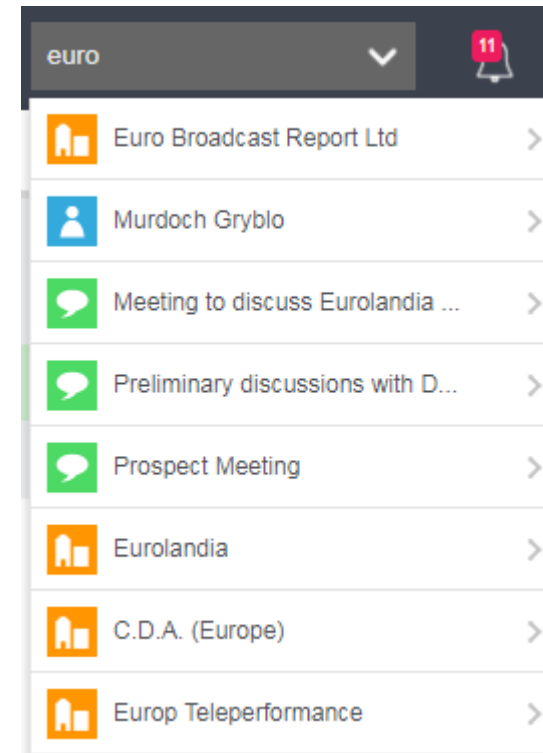


Status	
<b>Severity:</b> Normal	<b>Assigned To:</b> Kylie Ward
<b>Stage:</b> Investigating	<b>Status:</b> In Progress
<b>Problem Type:</b> Software Bug	<b>Solution Type:</b> On-site Engineer
<b>Problem Details:</b> Tooltips missing from toolbar icons.	<b>Solution Details:</b> Missing file. Send Engineer to install file and investigate its deletion.



# Quick Find results optimisation

- Quick Find results optimised
- The query now does a full match search combined with wildcard search
- Provides better relevancy scoring on results



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**MailChimp**

Results analysis by person and company now available

# MailChimp Results by Person



**sage CRM** My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾

Summary Quick Look **Marketing** Notes Communications Opportunities Cases Addresses Phone/E-mail Self Ser

**Person:** George Revell **Phone:** 1 561 659 4121  
**Company:** Spring Computer **E-mail:** [GRevell@demosage.com](mailto:GRevell@demosage.com)

**Marketing Information**

**CRM Solution Implemented:**  
Yes

**IT Budget:**  
<\$1M

**Current Supplier:**  
3G Homes ☎ 44 1344 897 8791

**Preferred Database:**

**Current Supplier Description:**

**MailChimp Campaign Results for Current Person**  
2 Campaigns, Page 1 of 1

<u>Campaign Name</u> ^	<u>Group</u>	<u>Status</u>	<u>Email Open Count</u>	<u>Clicked Urls</u>
Boston Conference - Email 1	US East Contacts	Sent	2	1
Boston Conference - Mail 1 Clicked Interested	Boston Conference - Clicked In Mail 1	Sent	1	2

- Mailchimp Results are now available on the Person Marketing Tab
- Details MailChimp email marketing campaigns that this person has been included in
- Show count of emails opened and links clicked per campaign




# MailChimp Results by Company



**sage CRM**    My CRM ▾    Team CRM ▾    Reports ▾    Marketing ▾    Search ▾

Summary   Quick Look   Dashboard   **Marketing**   Notes   Communications   Opportunities   Cases   People   Addresses   Phone/E-

 ★    Company: Cross Medical Berkshire  
Phone: 1 410 558 6460  
E-mail: [info.CrossMedicalBerkshire@demosagecrm.com](mailto:info.CrossMedicalBerkshire@demosagecrm.com)

**Marketing Information**

CRM Solution Implemented:

IT Budget: <\$1M      Preferred Database:

Current Supplier: -None selected-      Current Supplier Description:

**MailChimp Campaign Results for Current Company**  
1 Campaigns, Page 1 of 1

Campaign Name ^	Group	Status	Email Open Count	Clicked Urls	Email Bounced	Unsubscribed
Company Email Campaign	USEastCompanies	Sent	2	1	No	No

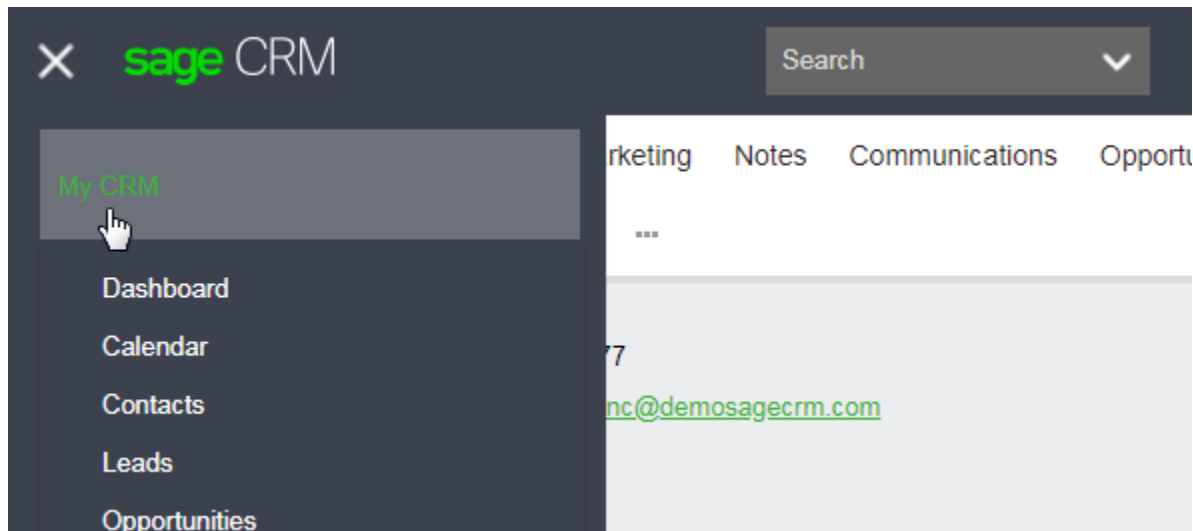
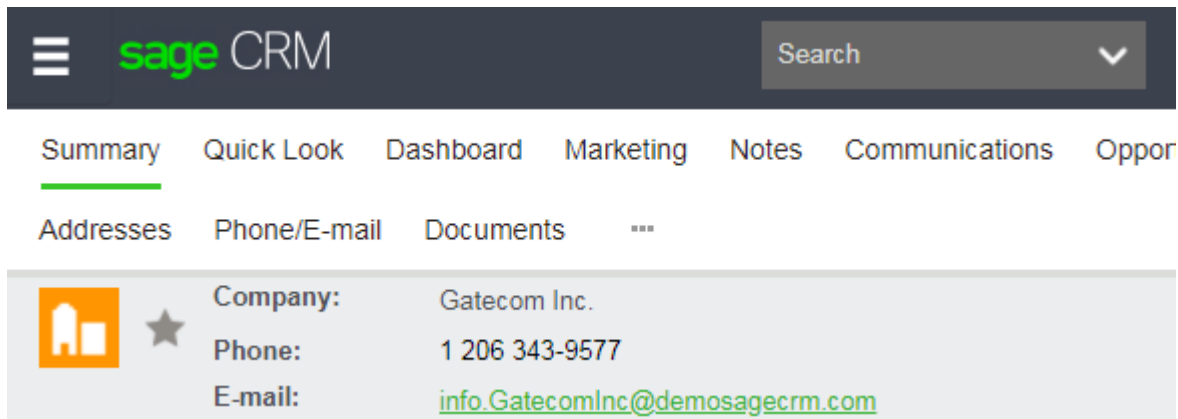
- Mailchimp Results are also available on the Company Marketing Tab
- Details MailChimp email marketing campaigns that used company email addresses such as sales@comp.com

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# Main Menu Display

Optimised for variable screen widths

# Main Menu Display on Narrow Screens



- The Main menu is now optimized 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



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# Gathering and Tracking Consent for Marketing Activities

# Gathering and Tracking Consent for Marketing



- Legislation in your regions may require that you have evidence of consent from a contact to be marketed to via email, text, calls etc.
- Sage CRM 2018 R2 has added a simple consent tracking capability, allowing you to store consents from customers against their contact record. Consent can be recorded for multiple types of campaign
- A request for consent can be manually issued, or groups of requests for consent can be issued from Sage CRM, using preconfigured template emails that include an 'accept' link
- When a contact clicks the link to accept marketing communications, this acceptance is recorded in Sage CRM against their record
- Note: to capture consents, your Sage CRM system must be configured with an **externally accessible URL**, e.g. <https://crm.mycompany.com/>

# Creating Consent Records



**sage CRM** My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾ Search ▾ 10 🔔 ☆ ⌚ 👤

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

★ **Person:** Sheila Murray **Phone:** 353 1 459898  
**Company:** Optiplex Software **E-mail:** [SMurray@demosagecrm.com](mailto:SMurray@demosagecrm.com)

**Consent**

<b>Created:</b> 12/02/2018 10:00	<b>Contact Via:</b> Email	<b>Contact Purpose:</b> E-marketing materials
<b>Requested:</b>	<b>Valid until:</b>	<b>Campaign:</b> <a href="#">Panoply Website Marketing</a>
<b>Status:</b> New		

- Consent Records can be created for Person and Lead records
- Multiple consents can be issued per contact record



# Issuing a Consent Request via email



sage CRM

My CRM Team CRM Reports Marketing

Search

Email

Person: Sheila Murray  
Company: Optiplex Software  
Phone: 353 1 459898  
E-mail: SMurray@demosagecrm.com

Email

Template: Person Consent Email

From: System Administrator <admin@panoply-tech.com>

To: SMurray@demosagecrm.com

CC:

BCC:

Subject: Panoply Technologies - our email communications with you

Do not file this communication

Source

Dear Sheila Murray,

Thanks for being a loyal customer of Panoply Technologies. We value your business and would like to continue to send you email regarding our products and services.

Please click [here](#) to confirm your consent to receiving email marketing messages from us.

Kind regards,

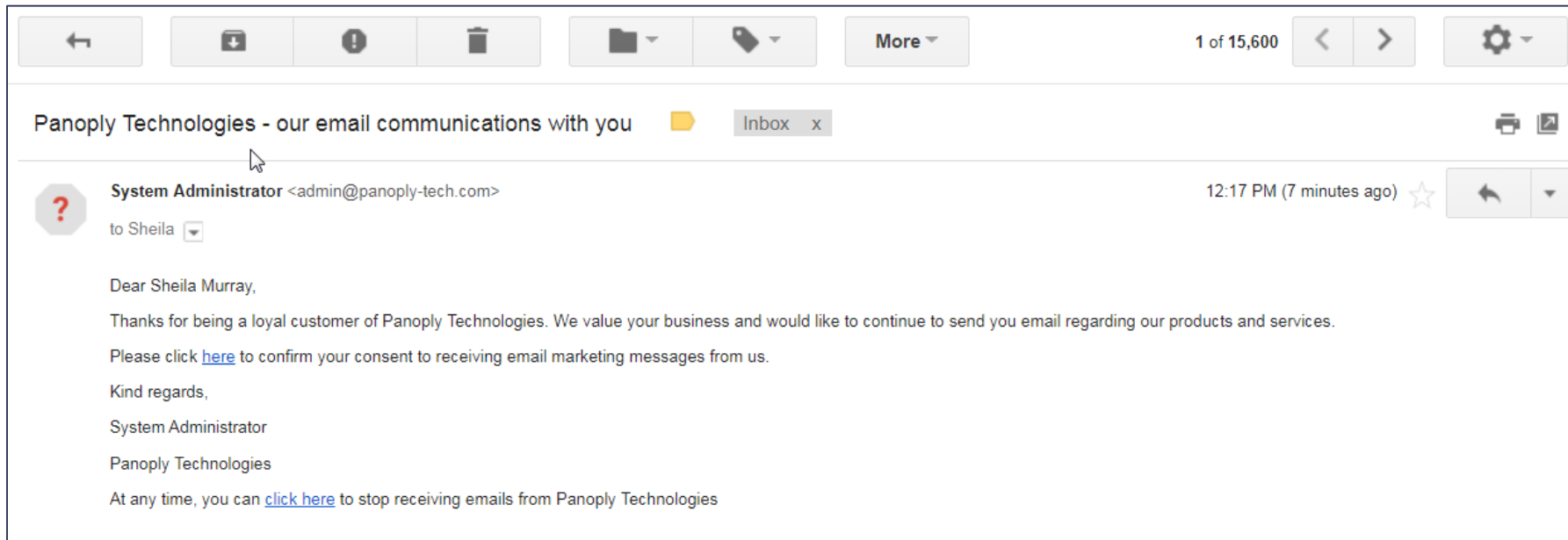
System Administrator

Panoply Technologies

At any time, you can [click here](#) to stop receiving emails from Panoply Technologies

- The template emails supplied contain embedded links for the recipient to click
- Templates available for both leads and persons

# Example Consent email



- Sample email as received by the contact containing embedded links to give or withdraw consent to receiving e-marketing emails

# Consent Acknowledgement



**Consent Response URL:**

<https://www.panoply-tech.com/emailmarketing/thankyou.html>



- After clicking a link in the consent email, the contact is redirected to the organisations website
- This is similar to the existing web-to-lead functionality in Sage CRM
- The Consent Response URL is configured in the E-mail Configuration area within Administration / Email and Documents



# Automatically Captured Consent



sage CRM

My CRM Team CRM Reports Marketing Search

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

Person: Sheila Murray Phone: 353 1 459898  
Company: Optiplex Software E-mail: [SMurray@demosagecrm.com](mailto:SMurray@demosagecrm.com)

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

- The consent record is automatically updated after the contact has clicked the link in the email they received

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# Mass Consent Requests

# Mass Consent Request



sage CRM

My CRM Team CRM Reports Marketing Search

Groups

**Group Details**

**Name:** CA Leads  
**Type:** Dynamic Group  
**Entity:** Lead  
**Source View:** Lead  
**Description:**  
**Available To:** Private

**3 Leads, Page 1 of 1**

Status	Company Name	First name	Last name	Description	Stage	Assigned to	Territory
In Progress	Storage Independent	Rich	Simmons	Website Offer #1 - Lead	New Lead	Fred Jones	Marketing - US
In Progress	Container Depository	Simon	Lane	ExpenseCheckLead - Phone	New Lead	Fred Jones	Marketing - US
In Progress	Dickinson Baptist	Matt	Hewson	TimeNExpense 2nd Mailshot Lead	New Lead	Fred Jones	Marketing - US

Save As  
Change  
Delete  
Cancel  
**Actions:**  
Merge to Word  
Merge to PDF  
New Task  
New E-mail  
New Consent E-mail  
Export to File  
Refresh

- Consent requests can be issued to groups of Leads or Persons



# Mass Consent Request Template



Sage CRM

My CRMTeam CRMReportsMarketing

Search

Send Mass E-mail

Email

Dedupe against other Group:  
ALLCALeads

E-mail Options

Template:Lead Consent Email

From:System Administrator <admin@panoply-tech.com>

Subject:Panoply Technologies - your recent registration with us

Choose Field to insert into the E-mail:

SourceCopyPasteUndoRedoFindReplaceListBulletsBoldItalicUnderlineStrikethroughText ColorBackground ColorLinkUnlinkFlagTableGridListOmegaAlignJustifyFullscreen

StylesFormatFontSizeA+AA-

Dear #lead\_personfirstname#,

You recently registered your contact details with Panoply Technologies. We value your privacy and need to obtain your consent in order to continue to send you email regarding our products and services.

Please click [here](#) to confirm your consent to receiving email marketing messages from us.

Kind regards,

#user\_firstname# #user\_lastname#

- Prebuilt templates containing clickable links can be sent to Sage CRM groups of Person and Lead contact records to gather consent
- A unique link in the email sent to every contact, allowing you issue a mass consent email and track individual responses

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# Using Consent Received

# Using Consent Received



**sage CRM** My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾ Search ▾

New Group Stage 1 of 4

 Groups for: Person

**Group Details**

<b>Name:</b> <input type="text" value="Website Marketing Campaign - Consented Contacts"/>	<b>Type:</b> <input type="text" value="Dynamic Group ▾"/>	<b>Entity:</b> <input type="text" value="Person ▾"/>	<b>Source View:</b> <input type="text" value="Consented Persons ▾"/>
<b>Description:</b> <input type="text" value="All contacts who have given consent for email marketing"/>	<b>Available To:</b> <input type="text" value="Private ▾"/>		

- You should use the consent received views when building the Sage CRM group for your campaign
- Sage CRM 2018 R2 includes consented record views for lead and person groups




# Using Consent Received



**sage CRM** My CRM ▾ Team CRM ▾ Reports ▾

Group Stage 3 of 4

 Groups for: Person

**Search Criteria for List**

cmgt - Campaign:  
Matches this value

Campaign:  
Panoply Website Marketi 🔍 ▾

cmgt - Contact Purpose:

☒ Matches any of the values:

☐ Does not match any of the values:

☐ Is Empty

cmgt - Contact Via:

☒ Matches any of the values:

☐ Does not match any of the values:

E-marketing materials  
Sales offers  
Third-party offers  
--All--

Email  
Phone call

- In this example, all Contacts
  - from whom consent was received
  - for the selected campaign
  - who agreed to receive email marketing materials
  - via email


are being assembled into a Sage CRM group for an email marketing mail.

# Using Consent Received



sage CRM My CRM ▾ Team CRM ▾ Reports

Group Stage 4 of 4

 Groups for: Person

**Group Details**

<b>Name:</b> Website Marketing Campaign - Consented Contacts	<b>Type:</b> Dynamic Group
<b>Description:</b> All contacts who have given consent for this campaign	<b>Available To:</b> Private

2 People, Page 1 of 1

Last Name	First Name	Business E-mail
Murray	Sheila	SMurray@demospacecrm.com
Allen	Zack	ZAllen@demospacecrm.com

- Completed group of consented contacts
- This group of consented records should be used in email marketing campaigns in regions where consent is required

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# Deleting Communications and Documents



# Deleting all Communications for a Person



- You may wish to remove all of the communications you had with a person or lead in your Sage CRM system
- This is an administrator only feature

sage CRM

My CRM Team CRM Reports Marketing Search

Summary Quick Look Marketing Notes **Communications** Opportunities Cases Addresses Phone/E-mail Self Service Documents Relationships Consent

**Person:** Sheila Murray **Phone:** 353 1 459898  
**Company:** Optiplex Software **E-mail:** [SMurray@demosagecrm.com](mailto:SMurray@demosagecrm.com)

6 Communications, Page 1 of 1

	Date / Time	Action	Person	Subject	User	Territory	External Attendees	Regarding	Status
	16/01/2018 10:10	Letter In	Sheila Murray	PO received	William Dolan	Ireland			
	04/01/2018 16:45	Phone Out	Sheila Murray	Got Sheila. Sean is out until Monday	William Dolan	Ireland			
	30/12/2017 10:00	Phone Out	Sheila Murray	Follow Up Call to arrange next stage with Sean O'Reilly	William Dolan	Ireland			
	26/12/2017 12:30	Phone Out	Sheila Murray	Called to see if there is an opportunity. There seems to be a customer care opportunity and I have arranged a demo	Peter Johnson	Ireland			
	26/12/2017 11:00	Demo	Sheila Murray	First meeting on their requirements	William Dolan	Ireland			
	25/12/2017 16:30	Phone Out	Sheila Murray	Made initial contact. Sheila Murray not available. Try tomorrow.	Peter Johnson	Ireland			

**Action:** --All--  
**Status:** --All--  
**Type:** --All--  
**Territory:** --All--  
**Filter**

New Task  
New Appointment  
New E-mail  
**Delete All Communications**

# Deleting all Documents for a Person



- You may wish to remove all documents associated with a Person in Sage CRM
- This is an administrator only function
- Documents will be physically deleted from the Sage CRM server if the current Person is the only record associated with the document

The screenshot shows the Sage CRM interface. At the top, there's a navigation bar with 'sage CRM' logo and tabs for 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. A search bar is on the right. Below this, a secondary navigation bar includes 'Summary', 'Quick Look', 'Marketing', 'Notes', 'Communications', 'Opportunities', 'Cases', 'Addresses', 'Phone/E-mail', 'Self Service', 'Documents' (which is highlighted), 'Relationships', and 'Consent'.

Under the 'Documents' tab, the profile of 'Sheila Murray' is shown, including her company 'Optiplex Software', phone number '353 1 459898', and email 'SMurray@demosagecrm.com'. Below the profile, it says '2 Documents Found, Page 1 of 1'.

A table lists the documents:

	Updated	File	Type	Category	Owner	Description	Status
	Today 15:51	Proposal.jpg	Proposal	Sales	System Administrator		Final
	Today 15:46	0J9A5727 (2).jpg	Proposal	Sales	System Administrator		Final

On the right side of the table, there's a sidebar with an 'Owner:' dropdown set to 'All--', a 'Filter' button, and buttons for 'Merge to Word', 'Merge to PDF', and 'Add File'. At the bottom of this sidebar, there's a dashed box with a download icon and the text 'Drop files here to attach them'. Below this, the 'Delete All Documents' button is circled in red.

# Mass Delete of Communications and Library Items



- Mass delete of communications and documents is available for Person and Lead groups in Sage CRM
- This is an administrator only function
- Requires Mass Operations feature to be enabled

24 People, Page 1 of 3

0 Excluded

Go to page 1

Exclude	First Name	Last Name	Company Name	Title	Phone Full Number
<input type="checkbox"/>	Paka	Chan	Publications Group	Finance/IT Director	1 516 903 7102
<input type="checkbox"/>	Dan	O'Sullivan	Credit Valley	Financial Director	1 716 783 4568
<input type="checkbox"/>	Patrick	Clark	Partitions Capital	Financial Director	1 860 291 9351
<input type="checkbox"/>	Joan	Stokes	Rent-A-Car Group	Financial Director	1 919 231 2451
<input type="checkbox"/>	Toby	Dixon	Dynamics Systems Aspen	Financial Director	1 732 469 8257
<input type="checkbox"/>	Robert	Ranadive	Films Corp Executive	Financial Director	1 914 *964 #VAL
<input type="checkbox"/>	Steve	Hurley	Public University California	Financial Director	1 757 573 5869
<input type="checkbox"/>	David	Parker	Vuitton Little	Financial Director	1 561 624 1234
<input type="checkbox"/>	Chris	Jones	Logical Group	Financial Director	1 212 625 4967

Actions:

- Add Records to the Group
- Merge to Word
- Merge to PDF
- New Task
- New E-mail
- Export to File
- Mass Update
- Mass Delete

**Mass Delete**

Communications ☒

Documents ☒

Delete selected Cancel

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# eMarketing – Shared Personal Data

What you need to know



# Sage CRM Company/Person records shared with MailChimp or Swiftpage are flagged

A screenshot of the Sage CRM interface. At the top, there's a dark header with the "sage CRM" logo. Below it, a navigation bar contains tabs: "Summary", "Quick Look", "Marketing", "Notes", and "Communications". The "Summary" tab is active. The main content area shows a person record for "Arnold Ball" at "The Software Forge Inc.". A green banner below the header states: "This screen displays person details. To change details on the **Person** panel, click". The "Person" panel is expanded, showing fields: "Last Name: Ball", "Middle:", "Title Code: Chief Executive Officer", "Territory: US East", and "Opt out of E-marketing communications:" with an unchecked checkbox. At the bottom, a red circle highlights the text "This record was sent to: Mailchimp".

- Any Company or Person records shared with the MailChimp or Swiftpage email marketing services are flagged automatically
- These services are operated from the USA. For Sage CRM customers in the EU, this means they are transferring personal data outside the EU area



# Other Sage CRM 2018 R2 Changes

Issues and enhancements addressed in this release

# Other Changes

A screenshot of the Sage CRM login interface. At the top left is the "sage CRM" logo with "Sales | Marketing | Service" below it. The login form includes a "User Name" label and input field, a "Password" label and input field, and a "Change Password" link with a checkbox. A blue "Log On" button is positioned below the password field. At the bottom, a dark footer bar contains the text: "Licensed to Sage Technologies", "Copyright © 1997-2018 Sage Technologies Limited. All rights reserved. Sage CRM 2018 R2". A mouse cursor is visible near the bottom right of the login area.

- **SQL Server 2017** This is now a supported version for the Sage CRM database
- **50+ Customer issues addressed**
- **Upgrades** You can use the Sage CRM 2018 R2 installation package to upgrade from Sage CRM 2018 R1 and Sage CRM 2017 (all versions)



# Thank you