What's New in Sage CRM 2018 R2

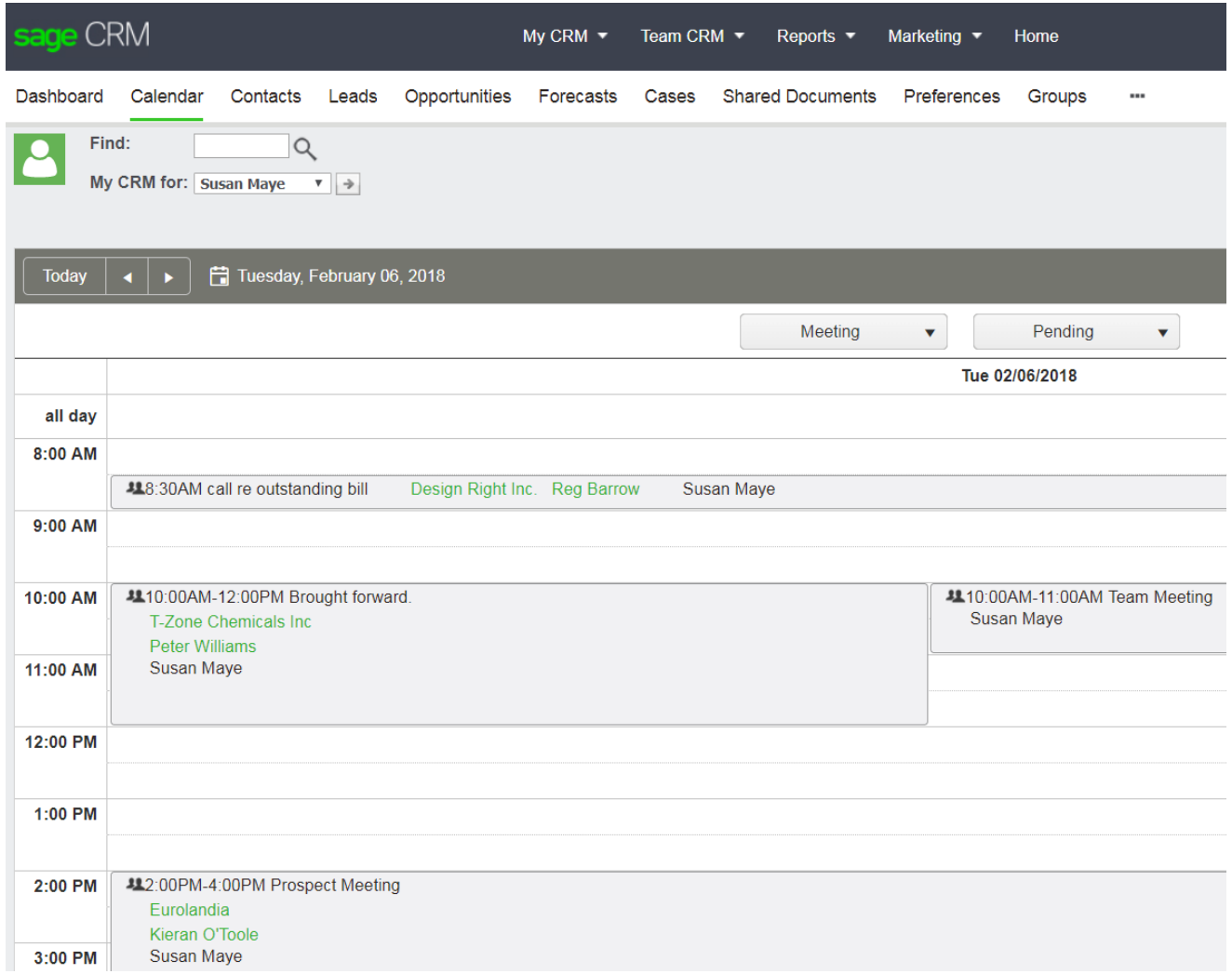
Sage CRM 2018 R2

- 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

Sage CRM Calendar

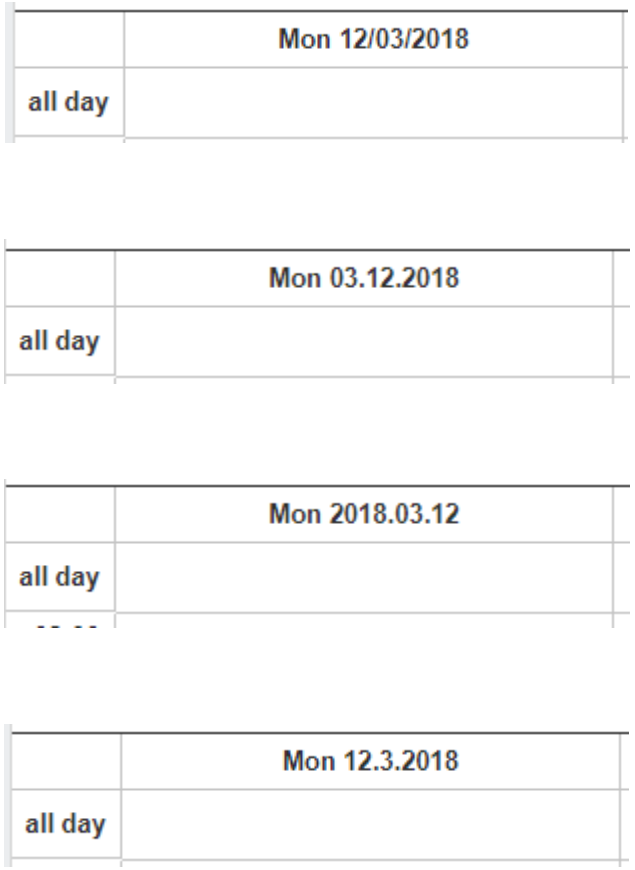
Continued updates to ensure the best usability possible for the feature at the heart of the application

Filtering on Calendar Screens



- 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	

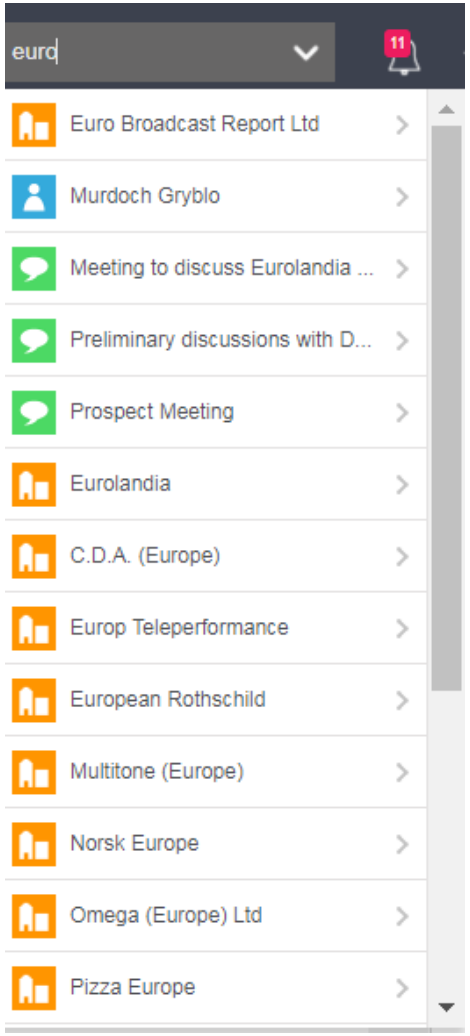
- Calendar now displays dates according to the setting in the user preferences area

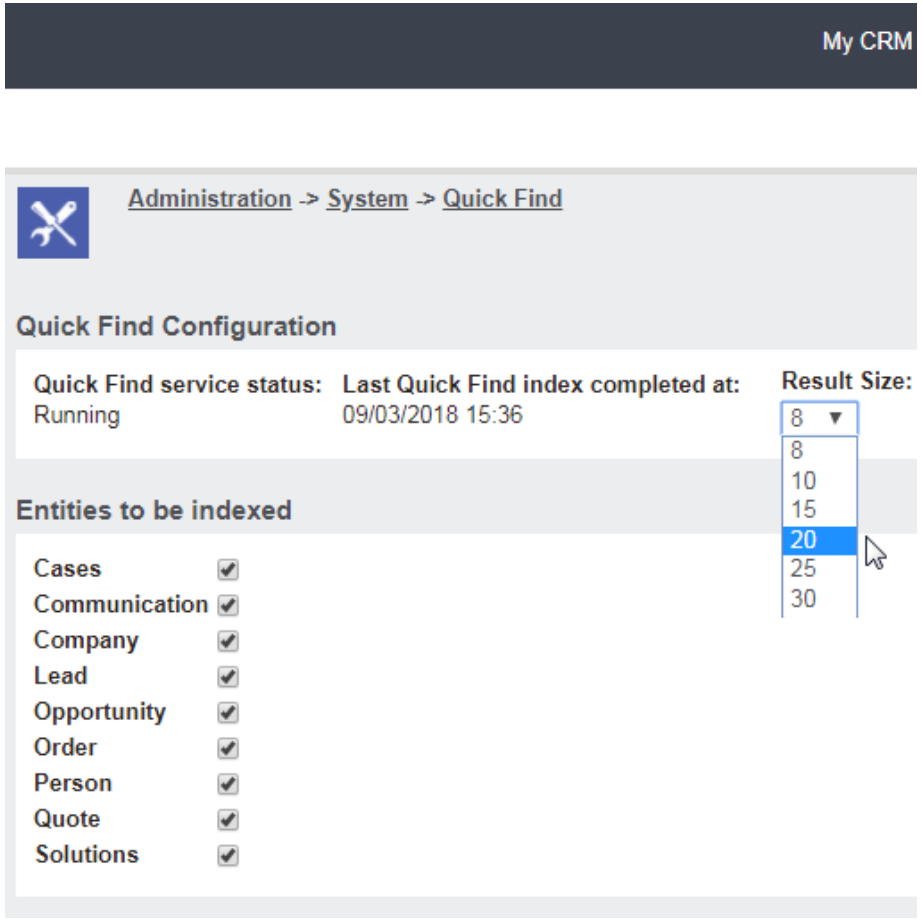
Quick Find

Accessing the information you need as fast as possible

Quick Find configurable results length

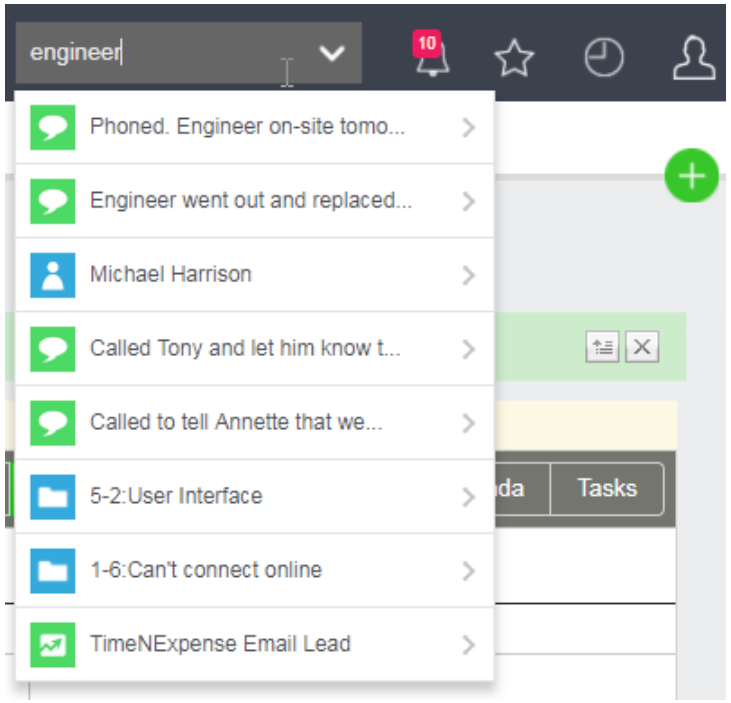
- Maximum number of on-screen results returned by Quick Find can now be configured
- System wide maximum value for all users is set in Quick Find configuration area
- Results appear as a scrollable list





Quick Find – Multiline Text fields

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



Status

Severity:
Normal

Assigned To:
Kylie Ward

Stage:
Investigating

Status:
In Progress

Problem Type:
Software Bug

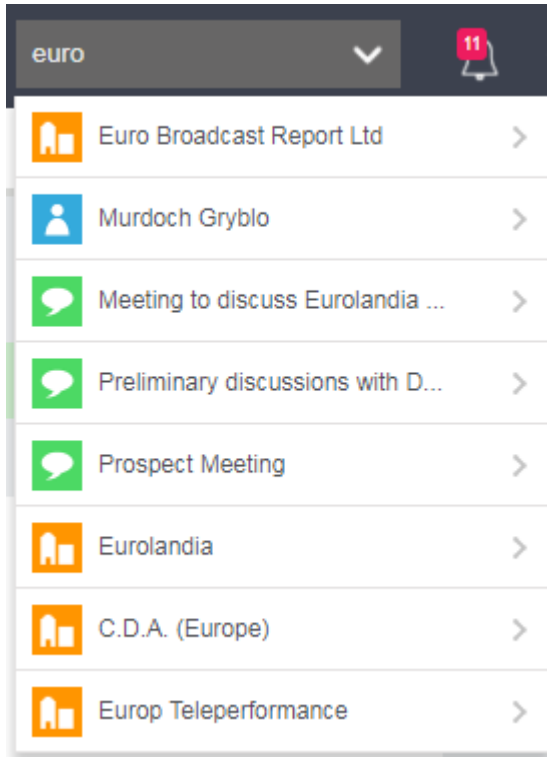
Solution Type:
On-site Engineer

Problem Details:
Tooltips missing from toolbar icons.

Solution Details:
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

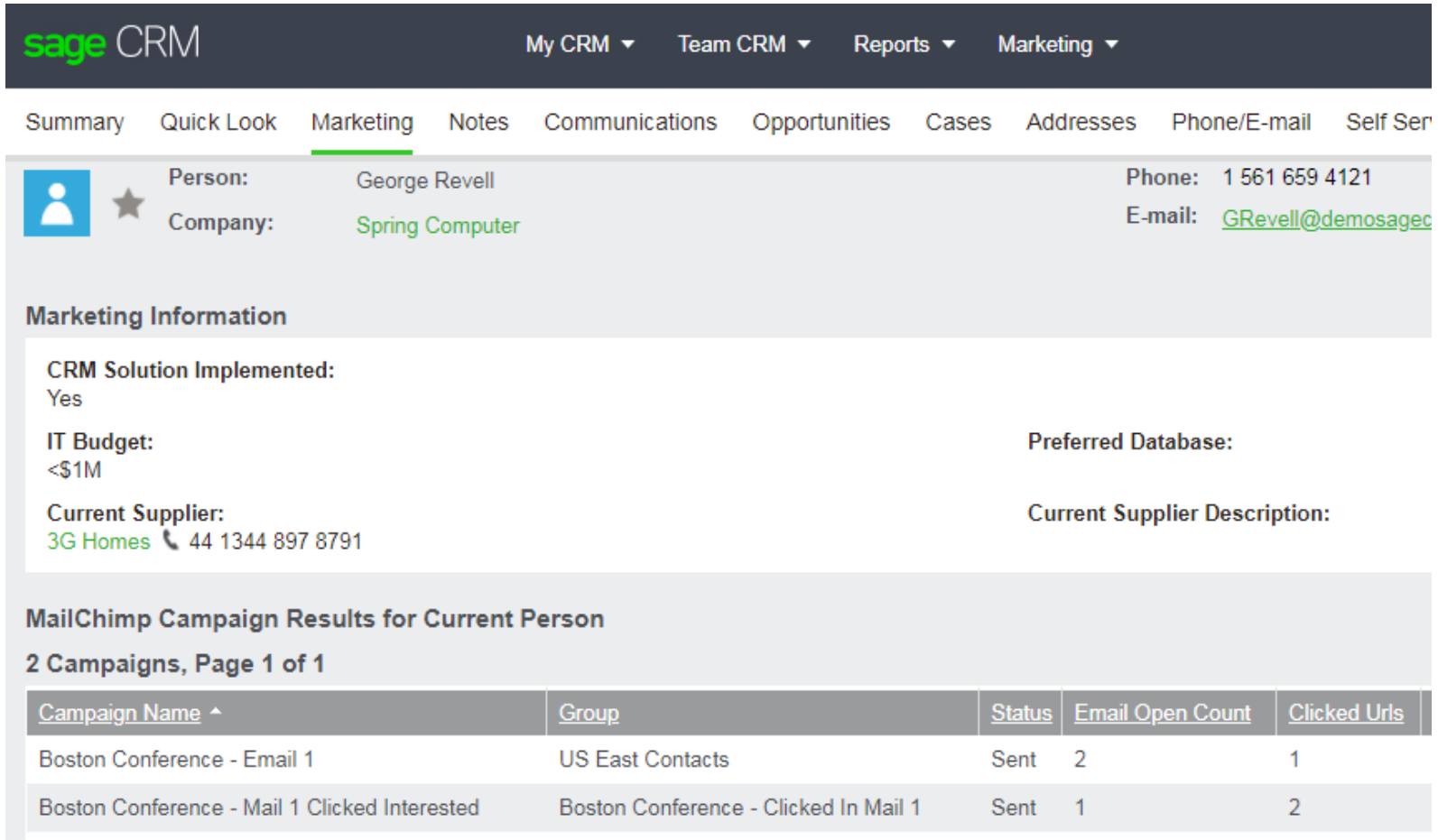


sage

MailChimp

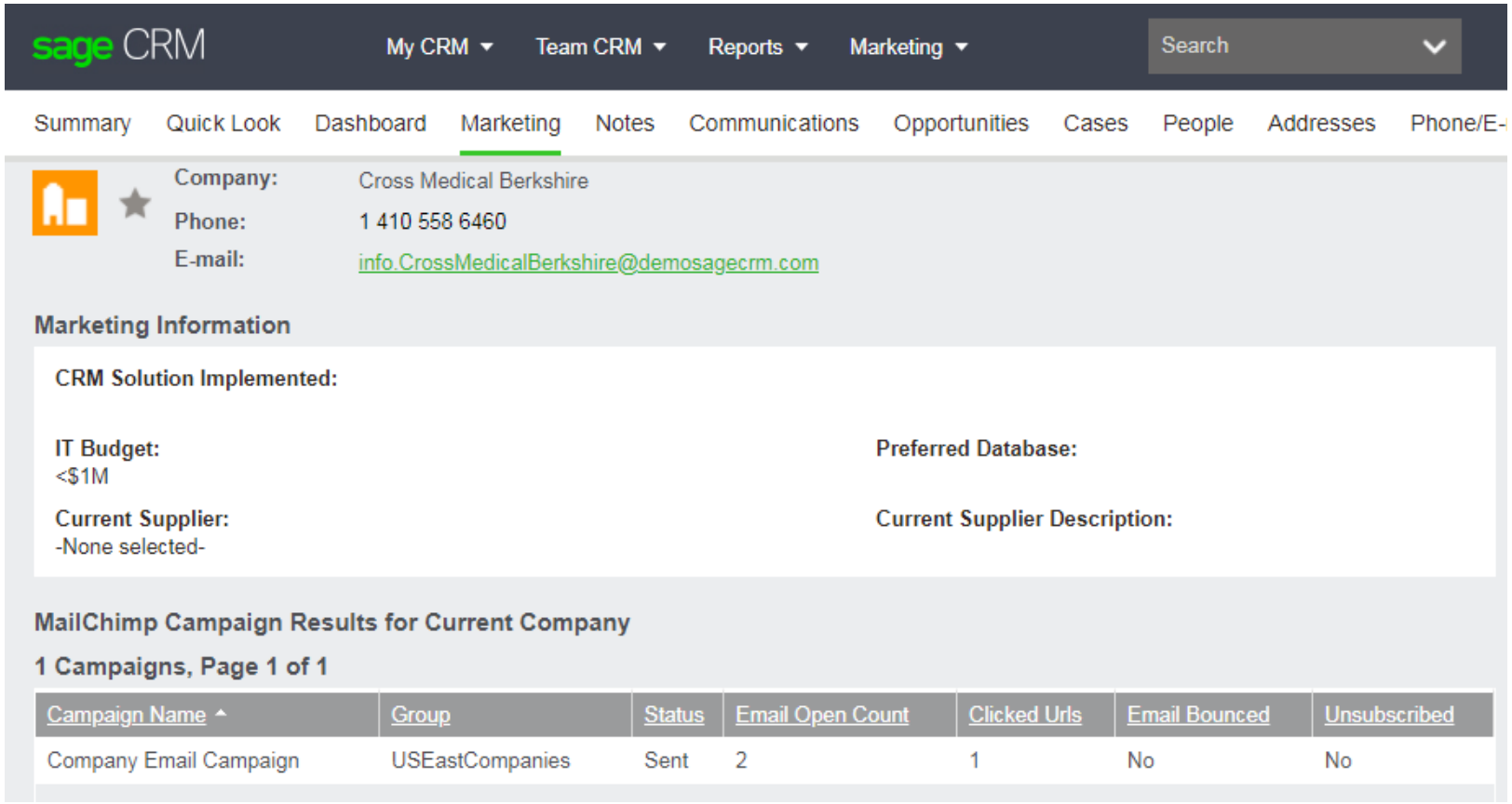
Results analysis by person and company now available

MailChimp Results by Person



- 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

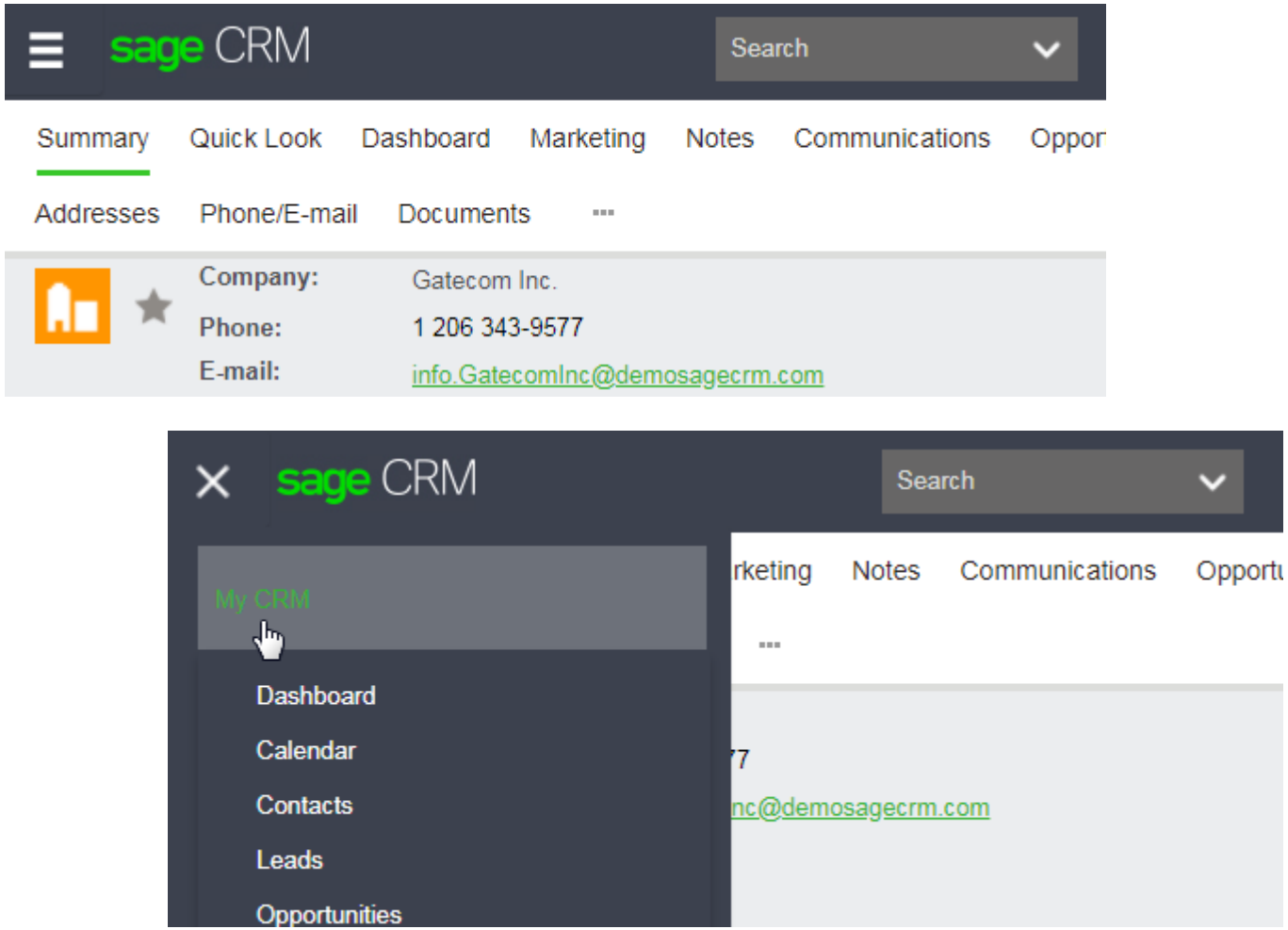


- Mailchimp Results are also available on the Company Marketing Tab
- Details MailChimp email marketing campaigns that used company email addresses such as sales@comp.com

Main Menu Display

Optimised for variable screen widths

Main Menu Display on Narrow Screens



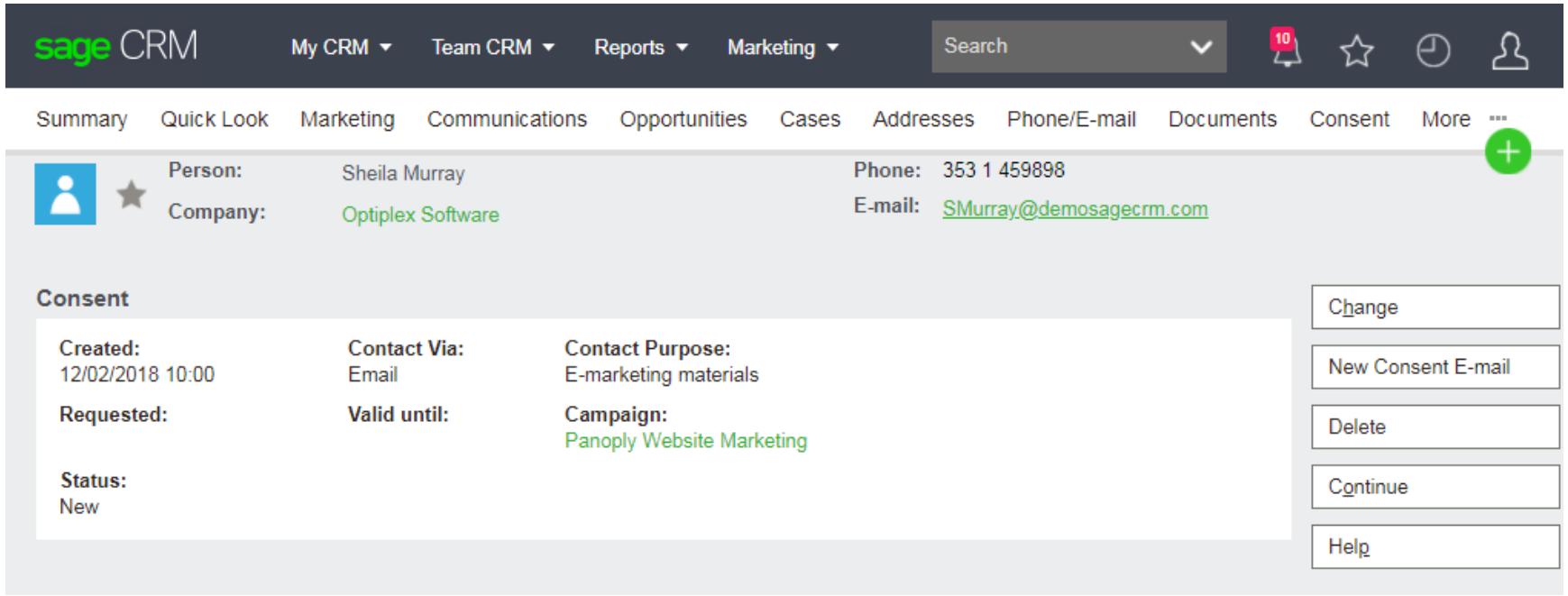
- The Main menu is now optimized for long item names and narrow screens
- A user preference setting of Always or Automatic determines how the main menu is displayed
- On narrow screens the main menu appears as a three horizontal line clickable icon

Gathering and Tracking Consent for Marketing Activities

Gathering and Tracking Consent for Marketing

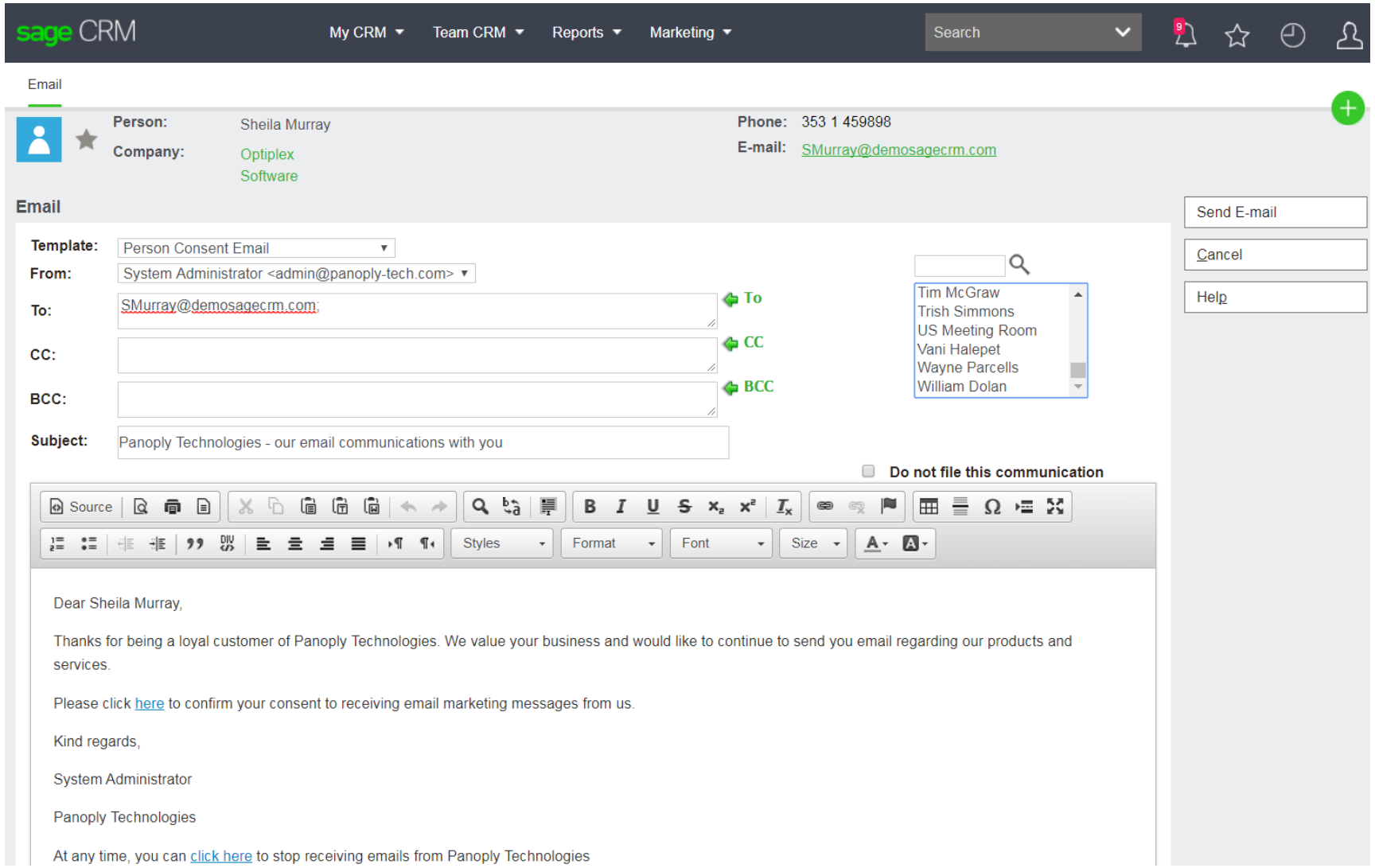
- Legislation in your regions may require that you have evidence of consent from a contact to be marketed to via email, text, calls etc.
- Sage CRM 2018 R2 has added a simple consent tracking capability, allowing you to store consents from customers against their contact record. Consent can be recorded 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



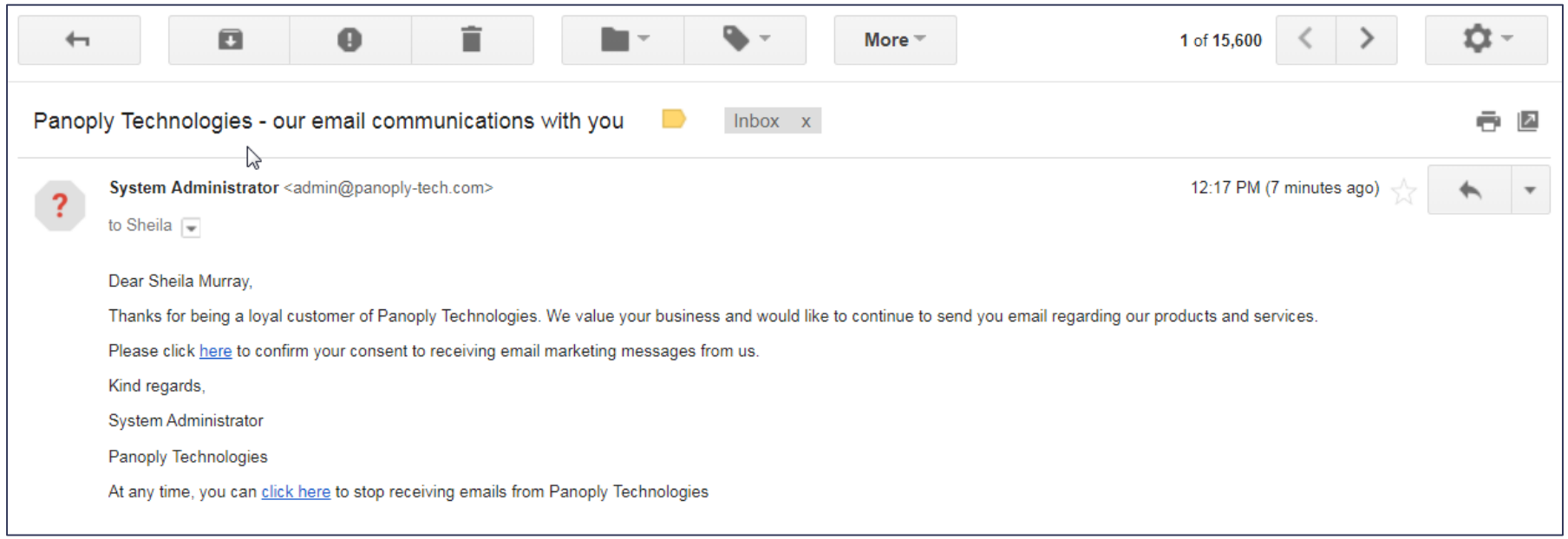
- Consent Records can be created for Person and Lead records
- Multiple consents can be issued per contact record

Issuing a Consent Request via email



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

Example Consent email



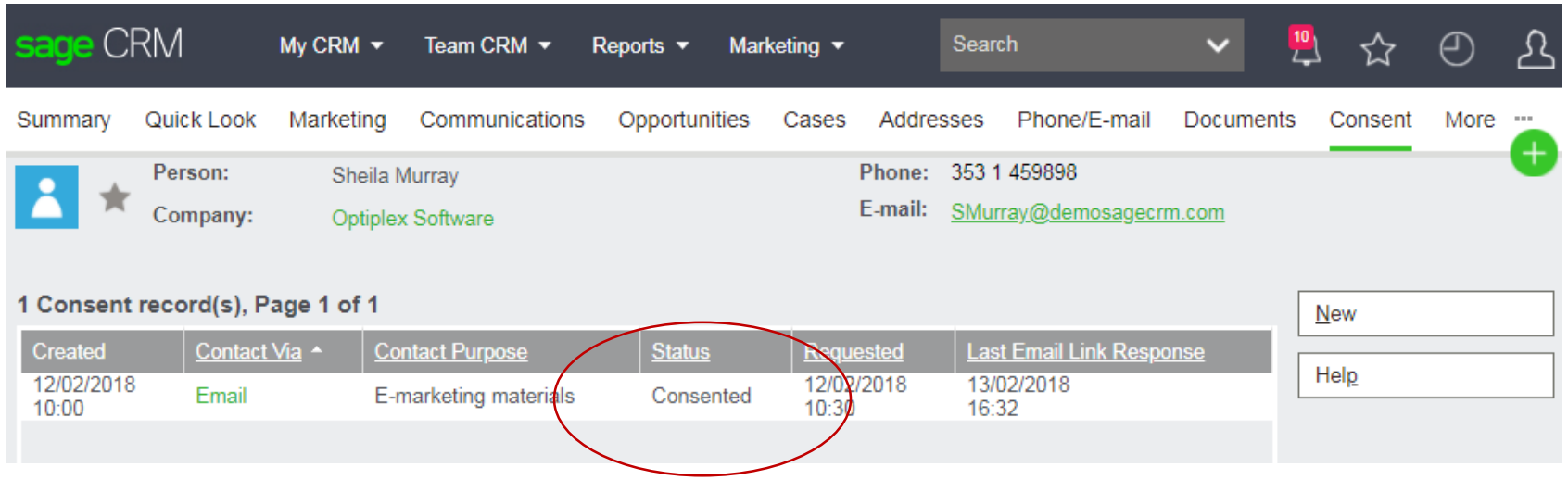
- Sample email as received by the contact containing embedded links to give or withdraw consent to receiving e-marketing emails

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

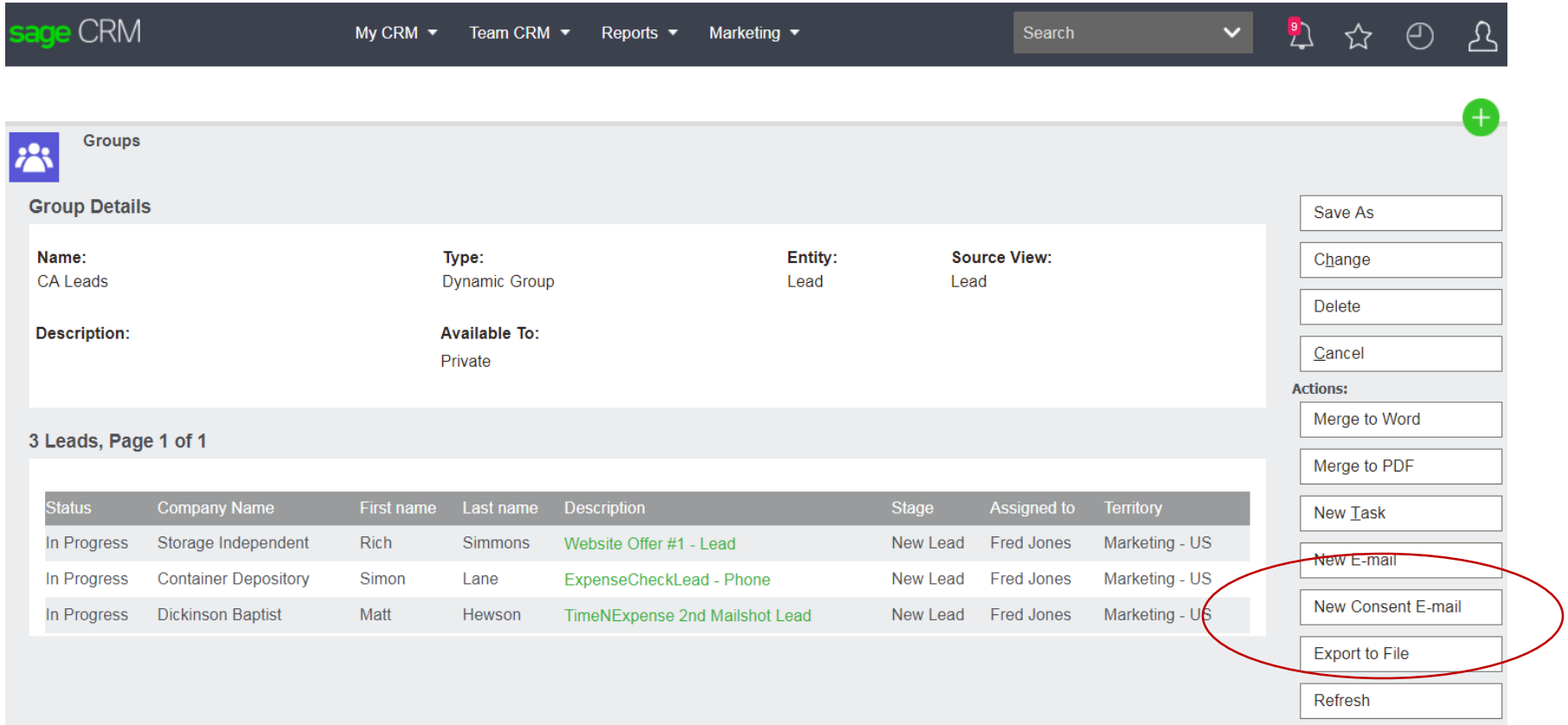
Automatically Captured Consent



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

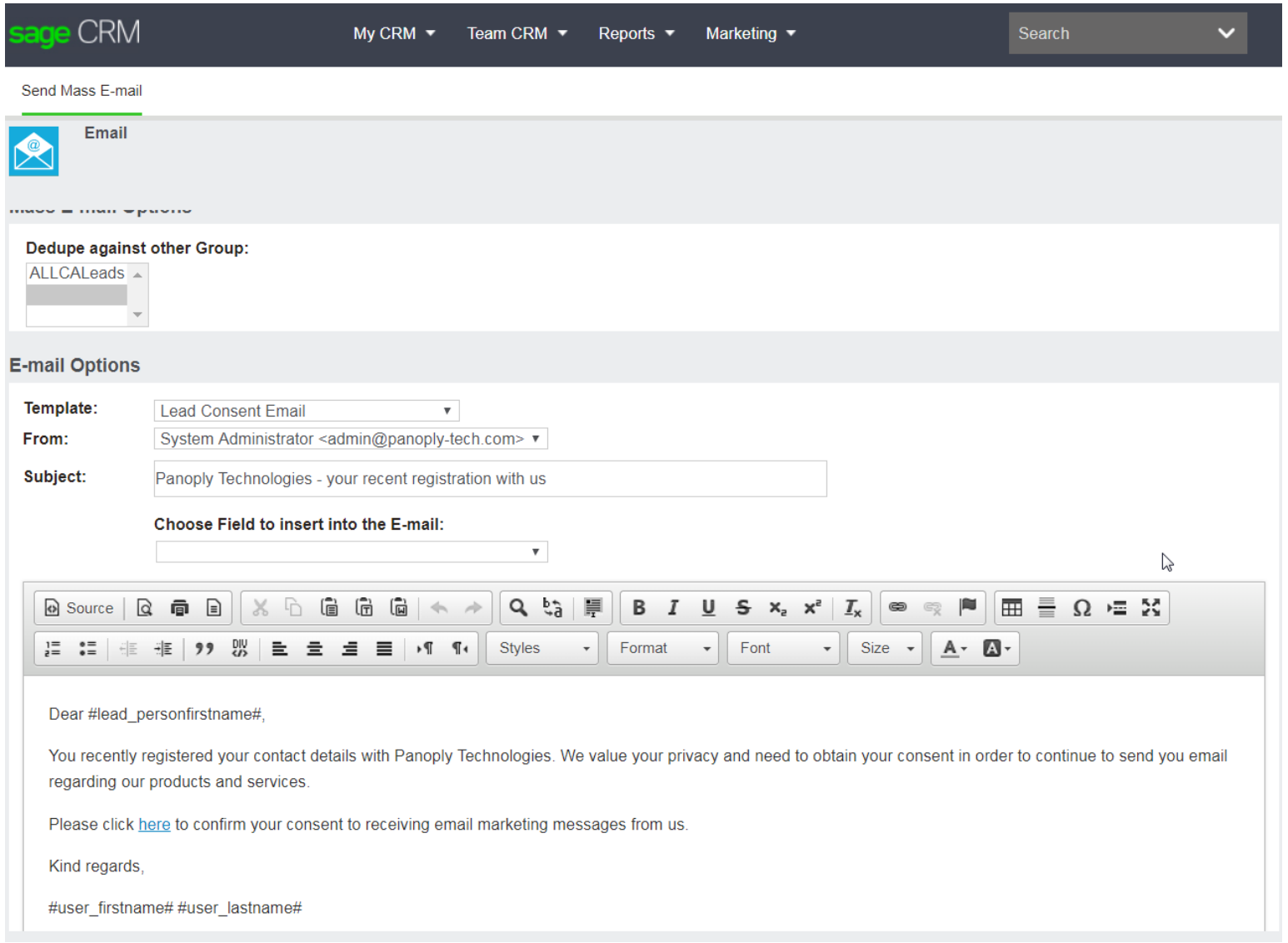
Mass Consent Requests

Mass Consent Request



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

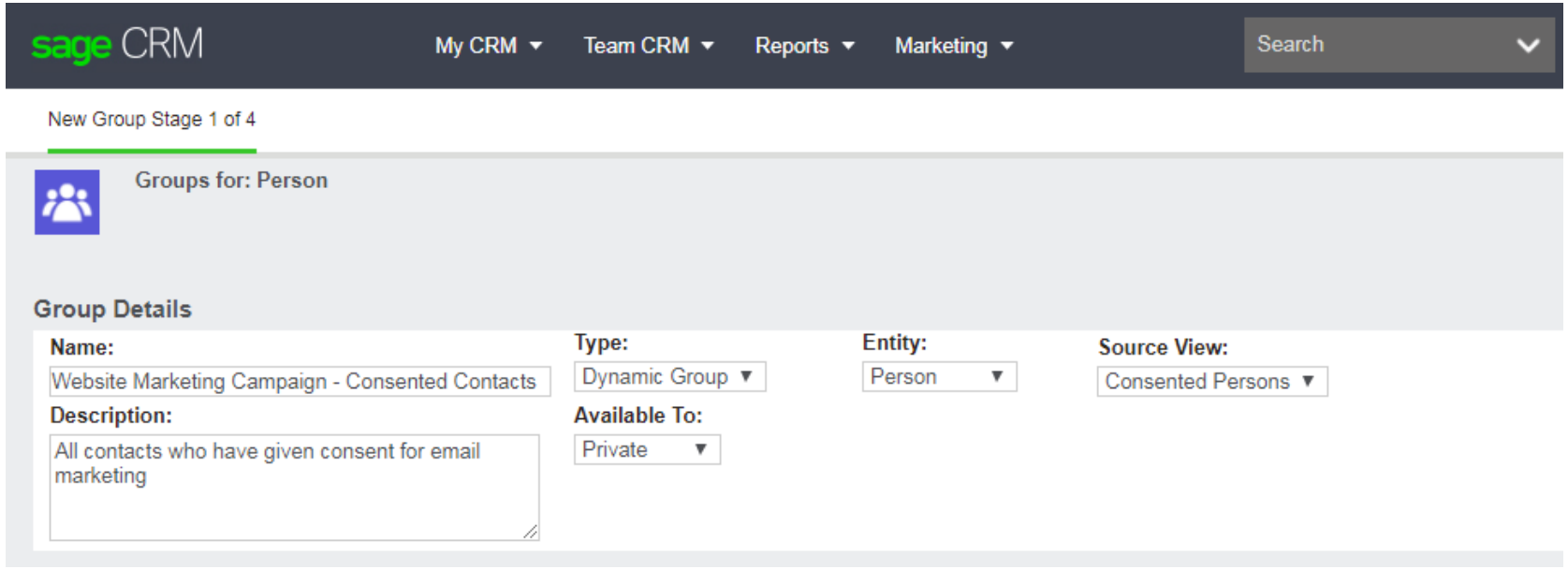
Mass Consent Request Template



- 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

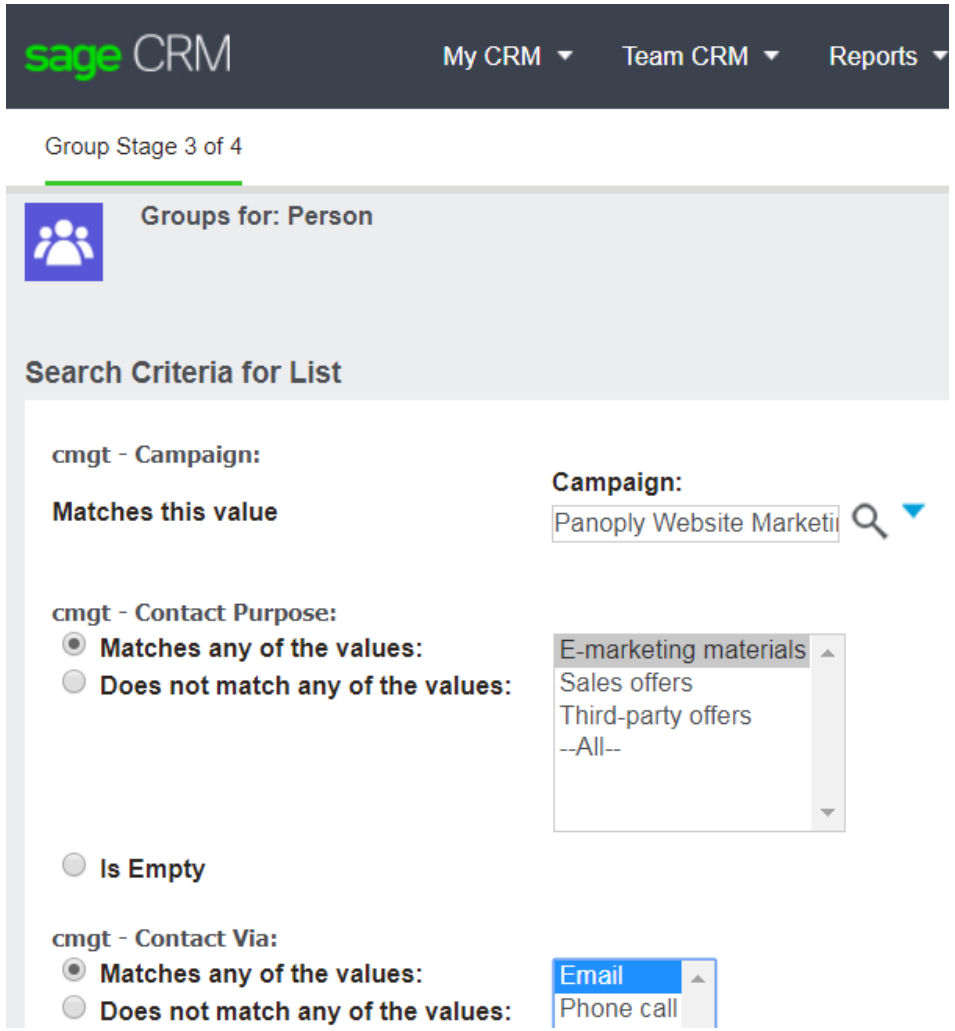
Using Consent Received

Using Consent Received



- 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

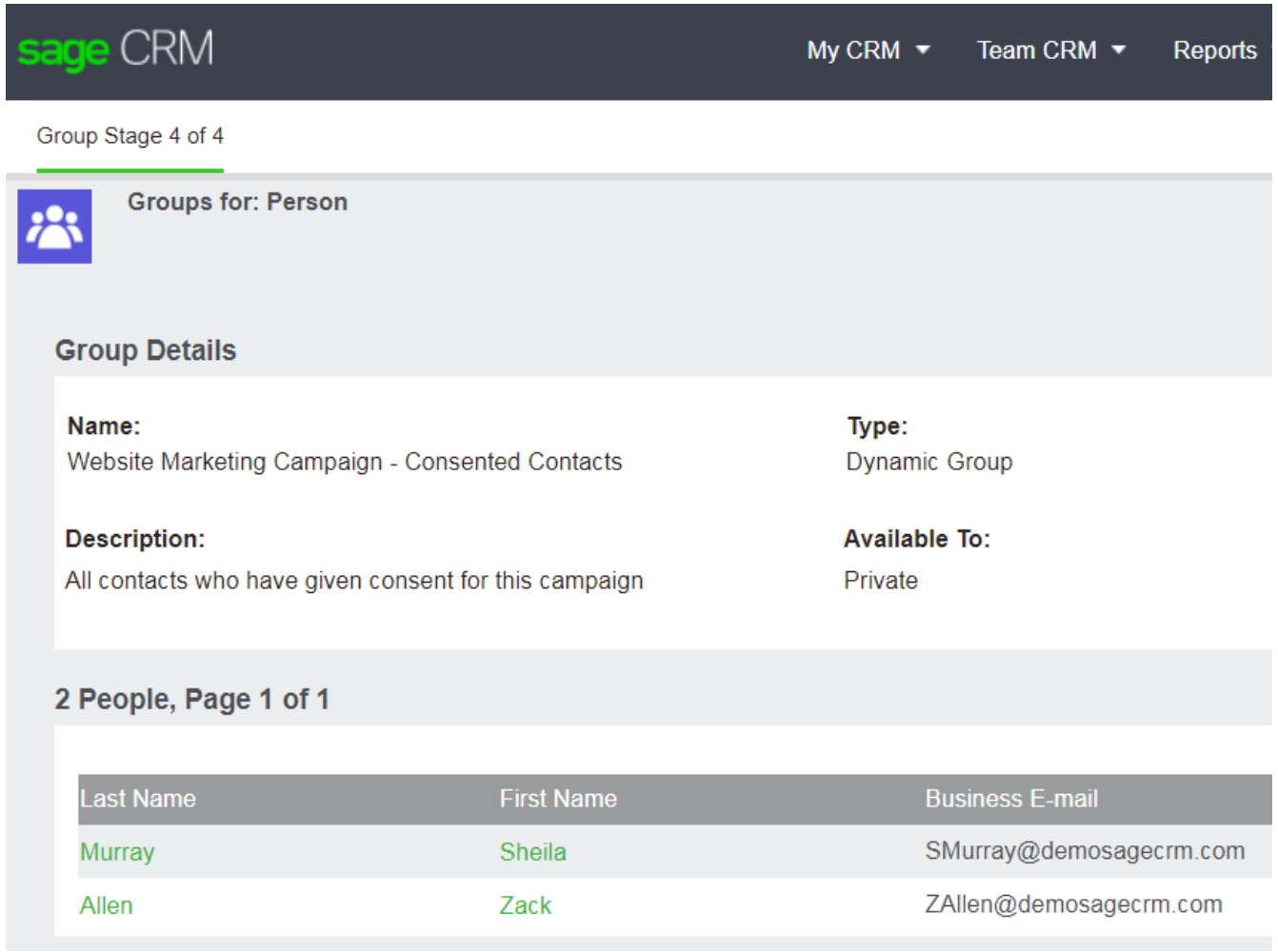
Using Consent Received



- 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

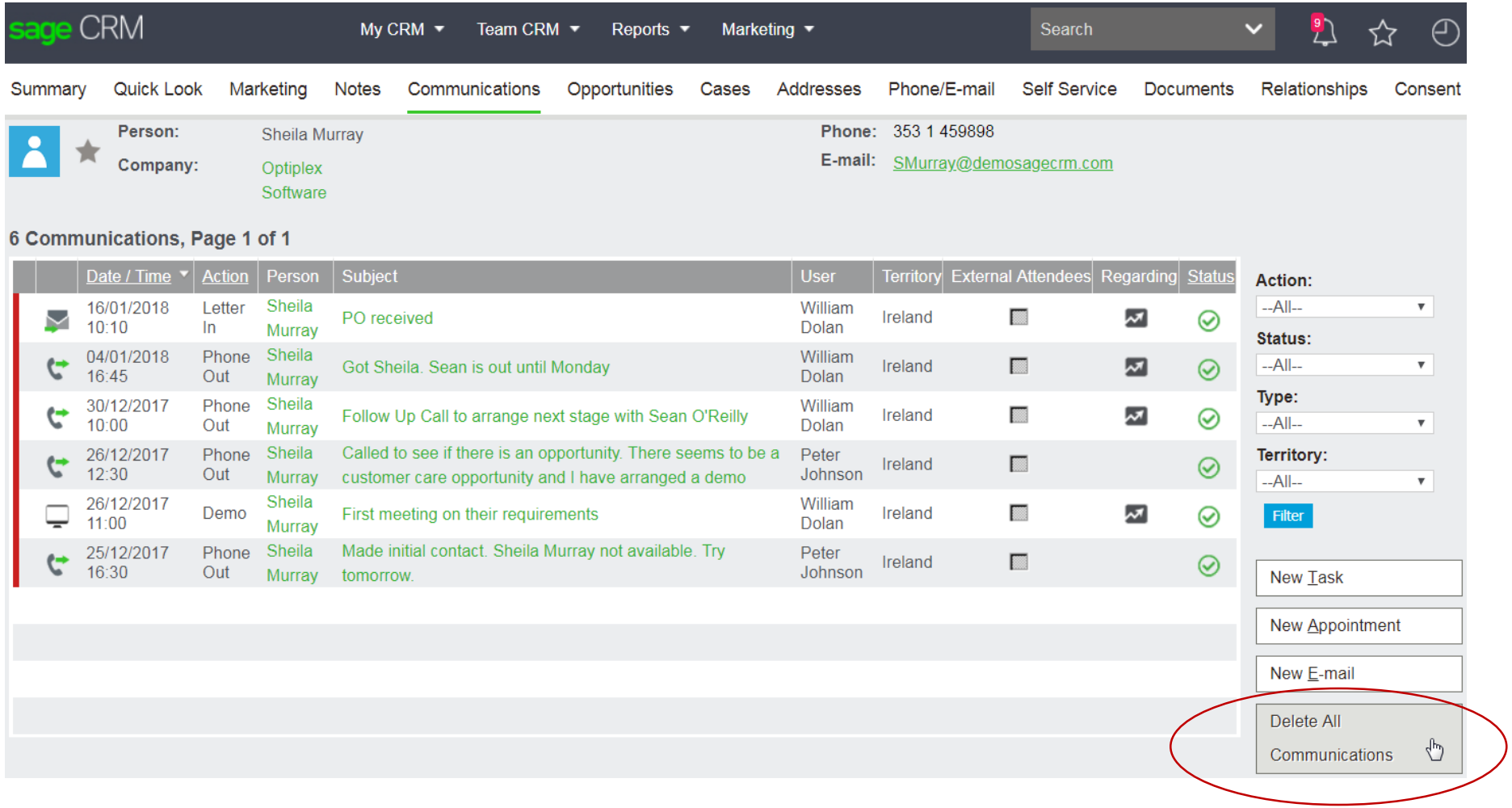


- Completed group of consented contacts
- This group of consented records should be used in email marketing campaigns in regions where consent is required

Deleting Communications and Documents

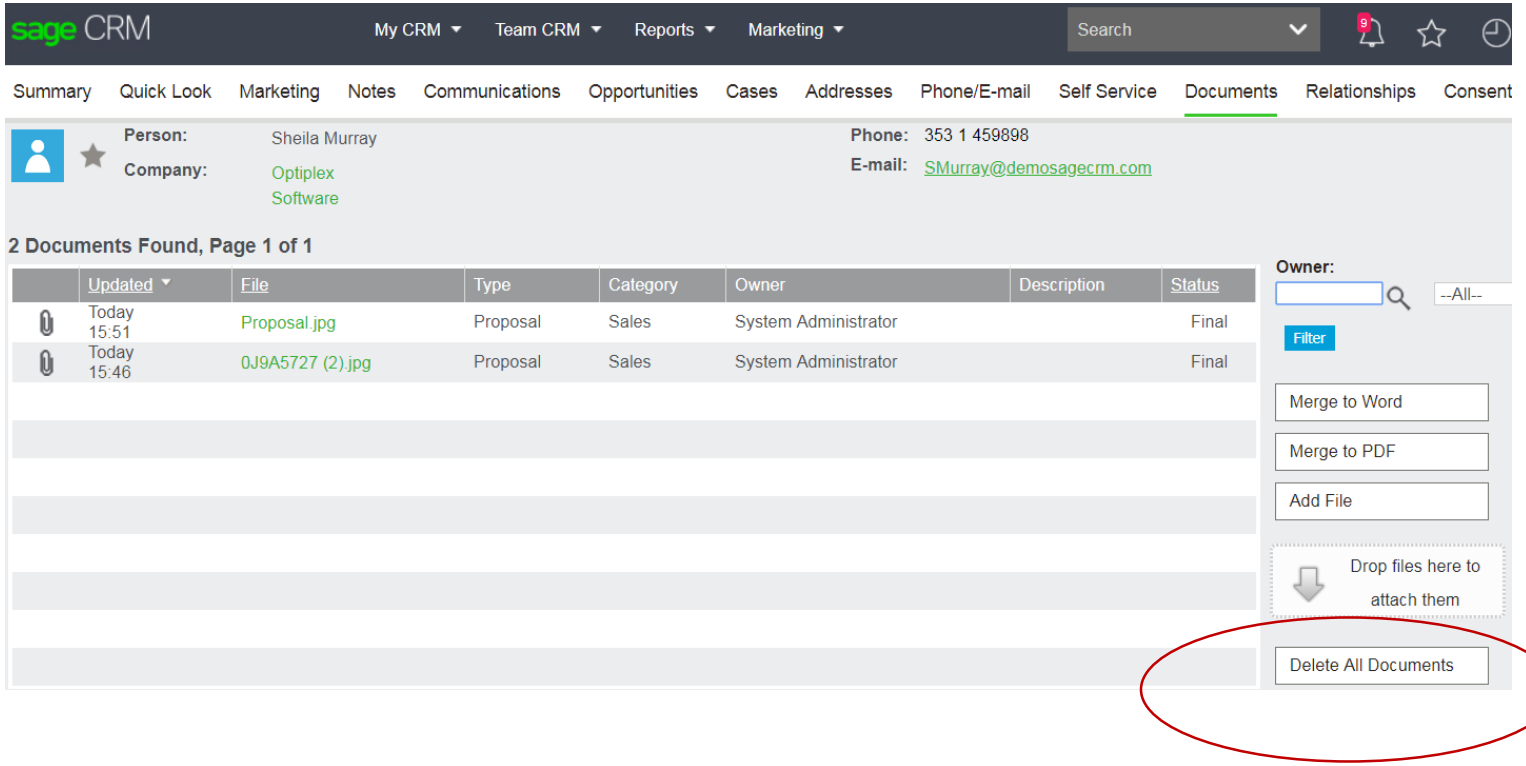
Deleting all Communications for a Person

- 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



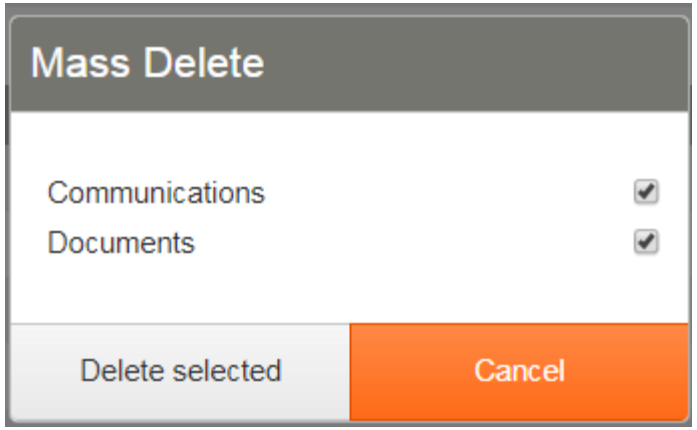
Deleting all Documents for a Person

- 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



Mass Delete of Communications and Library Items

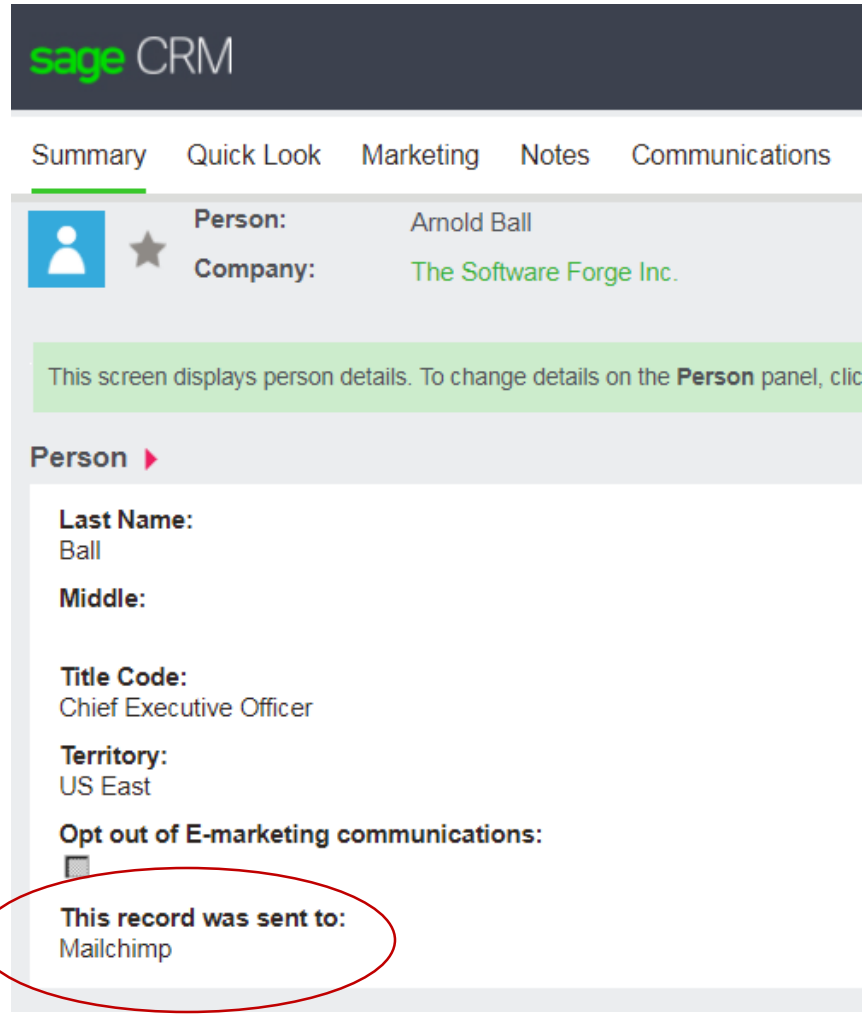
- Mass delete of communications and documents is available for Person and Lead groups in Sage CRM
- This is an administrator only function
- Requires Mass Operations feature to be enabled



eMarketing – Shared Personal Data

What you need to know

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



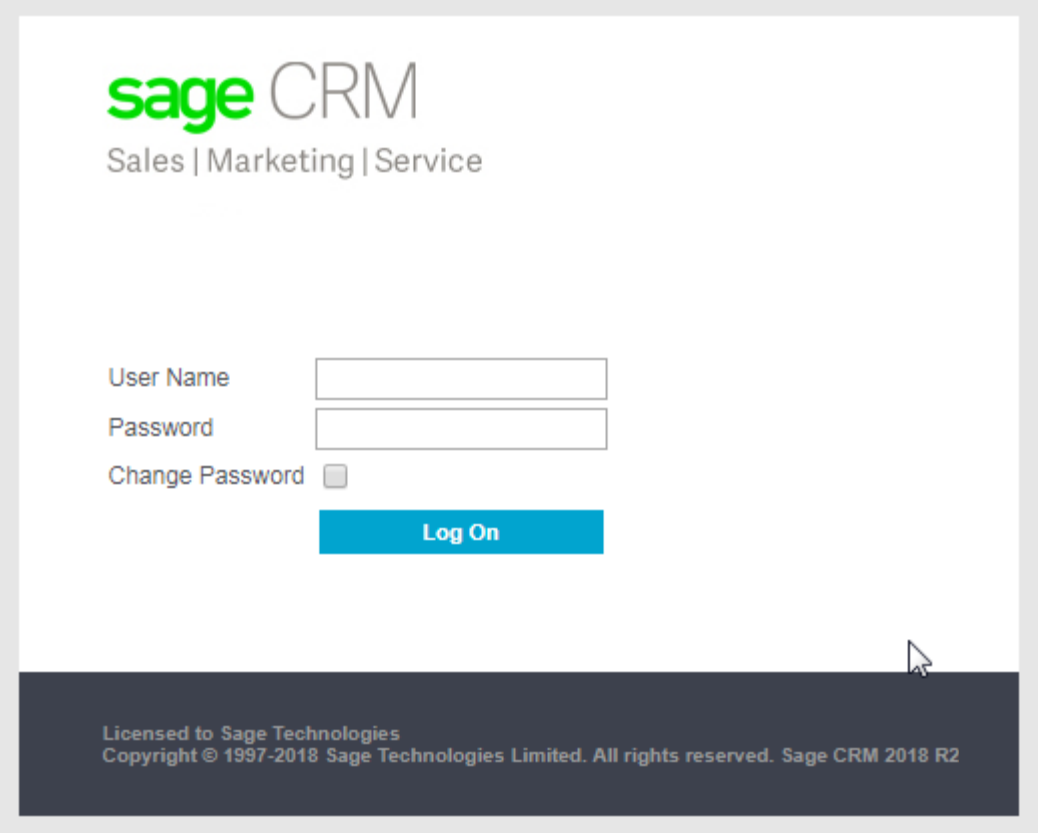
- Any Company or Person records shared with the MailChimp or Swiftpage email marketing services are flagged automatically

- 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



- **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

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