

# Sage CRM | What's New in Sage CRM v7.1 SP2?



Great User Experience on any Browser with cross-browser compatibility

## Enhanced User Experience with Sage CRM v7.1 SP2

The latest service pack release from Sage CRM is packed with new features and functionality delivering further flexibility and an enhanced user experience for customers to better manage their CRM solution for critical sales, marketing and customer service activities.

The new release delivers a host of new features across many aspects of the software that offer an enhanced user interface for a more intuitive, simpler user experience. The new features include cross-browser compatibility with Firefox, Chrome and Safari in addition to the standard Internet Explorer compatibility, enhancements to Mail Merge and Document Filing features and a new Library Management functionality.

### Cross Browser Compatibility

The release of Sage CRM v7.1 SP2 provides end users with the ability to access Sage CRM across all modern Internet browsers and work efficiently through the modern, intuitive interface. The end user supported browsers in Sage CRM v7.1 SP2 include Internet Explorer (versions 7, 8 and 9) and the latest versions of Firefox, Chrome and Safari.

### Mail Merge Enhancements

With this release, the Sage CRM mail merge functionality has been revamped and it is now a server-side feature. With this new update Microsoft Word does not need to be installed on the client machine and an Active X plug-in (or any other plug-in) is not required. The new release provides users with an easy to use rich text editor within Sage CRM for template creation and customisation, therefore users can create HTML templates from within the Sage CRM User Interface regardless of whether they are working in IE, Safari, Firefox, or Chrome. Sage CRM will offer continued support of predefined MS Word templates and users can continue to upload MS Word templates as normal. Additionally the new release gives customers access to new HTML templates out-of-the-box.

One of the great new features in Sage CRM v7.1 SP2 is the ability to create mail merge documents on custom entities. Mail Merge can now be run against any custom entity that has a Documents tab.

## SAGE CRM V7.1 SP2 UPGRADE BENEFITS SNAPSHOT

### Cross-browser compatibility

- Cross-browser compatibility with Firefox, Chrome, and Safari (on Safari OSX) in all Main Menu areas
- Supported browsers include Internet Explorer 7, 8 & 9 and the latest versions of Safari, Firefox and Chrome

### Document Attachment Enhancements

- Select and upload multiple files in a single transaction (Chrome and Firefox)
- Attach multiple files to a single task
- View and open documents from list level
- Pre-upload screening of file quantity, size, and type
- Intuitive drag-and-drop zone for attaching files (Chrome and Firefox)

### Mail Merge Enhancements

- Server-side mail merge with no plug-in requirements
- Easy to use rich text editor within CRM for template creation and customisation
- Continued support of predefined MS Word templates
- Mail Merge for Custom Entities

### Library Management

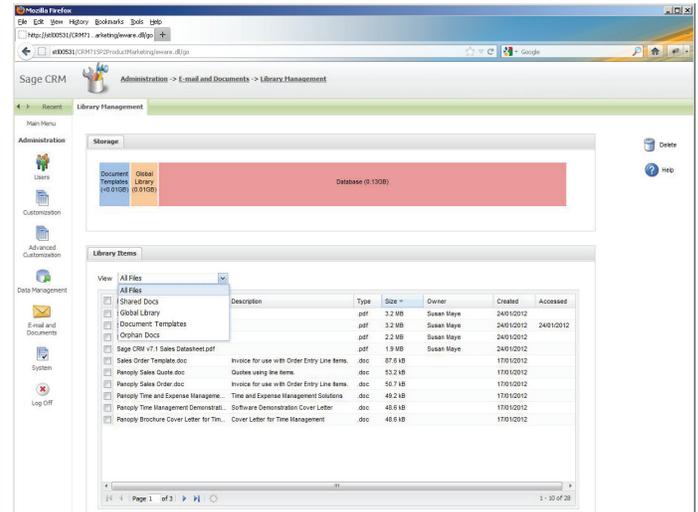
- Manage library storage from within Sage CRM
- Filter, sort and delete different types of library items
- Gain an overview of your storage limit and the space currently being used by library items

## Library Management

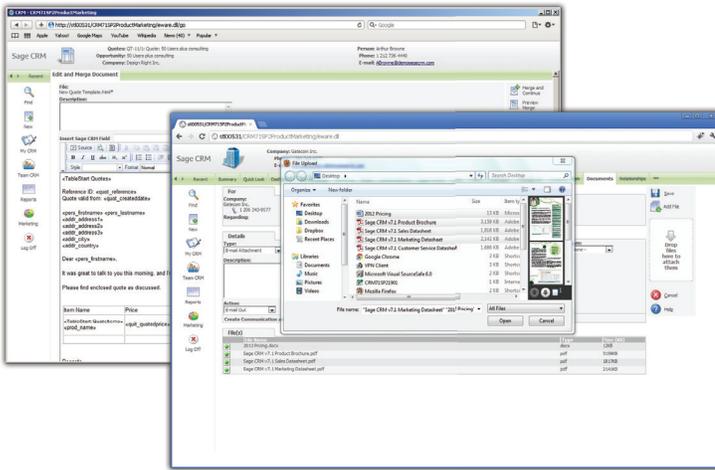
The elements which make up the Library in CRM can grow quickly, particularly if you are frequently merging and attaching documents and files to customer records. In Library Management you can filter, sort, and delete different types of library items.

In previous versions of Sage CRM if an end user deleted a record, for example a Communication record which had attachments, the Communication would be deleted, but the library entry file would stay within the CRM install file structure – creating an “orphaned document”. In the latest release of Sage CRM v7.1 SP2, when a record is deleted, then any attachments associated with that record will also be hard deleted from the CRM server. The Orphan Docs category within Library Management gives upgrade customers an easy way to manage and delete these records.

Additionally the new Library Management Option gives users an overview of their storage limit and the space currently being used by library items (documents, templates, and the global library) and the Sage CRM database. In turn users can select files from the Library Items list, and use the Delete button to help free up more space in the Library.



The new Library Management feature gives users an overview of their storage limit and the space currently being used by library items



Mail Merge and Document Attachment enhancements deliver an easy to use interface for selecting and uploading multiple files in a single transaction in Firefox and Chrome and allow users to create HTML templates from within the Sage CRM UI.

## Document Attachment Enhancements

In this new release users can now file documents in Sage CRM from an IE, Firefox, Safari, or Chrome browser. The dependency on the Document Drop ActiveX control has been removed (although one can switch it back on for Internet Explorer if they wish to file emails or drag-and-drop files). In addition to enhancing the feature to work across popular browsers, we have added the additional functionality:

- Select and upload multiple files in a single transaction (Chrome and Firefox)
- Attach multiple files to a single task
- View attachments drill-down from document and task lists
- Pre-upload screening of file quantity, size, and type including the ability to exclude specific document extensions and to limit files by size (Firefox, Chrome and Safari)
- Intuitive drag-and-drop zone for attaching files (Chrome and Firefox)

## About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day.

Sage CRM is optimised specifically for small and medium businesses. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we help you get the most from your CRM investment and accelerate your business growth.

Visit the Sage CRM Ecosystem at [www.sagecrm.com](http://www.sagecrm.com) to join the conversation on our user and partner communities and to access the Sage CRM Marketplace.

## The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solution users worldwide
- Over 13,400 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years experience