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Sage CRM 2015 R1
Release Preview

Introduction

This Release Preview provides information about new Sage CRM 2015 R1 features, and enhancements to existing features. We've included a description of each feature, with tips and instructions to help you start working with the new release.

- MailChimp
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MailChimp

MailChimp is an email marketing solution that's integrated with Sage CRM to let you create online campaigns, send emails, and track results.

MailChimp campaigns let you send automated emails to groups of contacts straight from Sage CRM. You can build campaigns using predefined templates or create a new template from scratch. Once you've kicked off a MailChimp campaign, you can view how recipients have interacted with the campaign emails so you can follow up with appropriate actions.

Integrating Sage CRM and MailChimp

As a System Administrator, you must integrate Sage CRM and MailChimp, and then configure users' settings so they can create and send MailChimp campaigns.

1. Click **<My Profile> | Administration | Email and Documents | MailChimp Integration**.
2. To create a MailChimp account, browse to https://login.mailchimp.com/signup? and complete the sign up steps.
3. Get the MailChimp API key and enter it in **MailChimp API Key**. Sage CRM uses this key to communicate with MailChimp. For more help, browse to http://kb.mailchimp.com/accounts/management/about-api-keys.
4. Get the MailChimp List ID and enter it in **MailChimp List ID**. Sage CRM uses this ID to send subscriber information to MailChimp. For more help, browse to http://kb.mailchimp.com/lists/managing-subscribers/find-your-list-id#Finding-the-List-ID-on-the-list.
5. Click **Save**. Sage CRM is integrated with MailChimp for your Sage CRM account.
6. To add users to your account, click **<My Profile> | Administration | Users | Users**.
7. Open the user that you want to configure and click **Edit**.
8. Choose **Yes** from **Enable MailChimp** and click **Save**.

Adding contacts to a MailChimp list

Before you set up a MailChimp campaign, you must first create a group of contacts that you want to send campaign emails to and upload the group to the existing MailChimp list. It's easy to add groups of contacts directly from Sage CRM to MailChimp.

1. Click **Groups** on the Main menu and open a group of companies, people, or leads. Make any updates to this group that you might need. Alternatively, create a new group.
   - The group must include an email column. If this column is missing, the **Send to MailChimp** button doesn't appear.
   - Each contact in the group must have a valid email address. If a contact doesn't have an email address, it won't be added to the MailChimp list.
   - The group name must not exceed 80 characters. If it's greater than 80 characters, the group details aren't added to the existing MailChimp list.
2. Click **Send to MailChimp**.

Creating a MailChimp campaign

To create a MailChimp campaign, first ensure you've set up the group of email recipients you want to use in the campaign and have added the group to the existing MailChimp list. You must also be connected to the Internet and have logged on to your MailChimp account.

1. Click **MailChimp Campaigns** on the Main menu and click **New**.
2. Enter the campaign details.
   - Enter the campaign name in **Name**. Don't use special characters such as a backslash or quotation marks at the start of the name, as this results in an error.
   - Specify the address from which campaign emails are sent in **From Email Address**.
   - Enter the sender's name that appears on campaign emails in **From Name**.
   - Choose the group to which campaign emails are sent in **Segment**.
3. Click **Create Campaign**.

MailChimp opens in a new browser window. If it doesn't open, ensure pop ups aren't blocked in your browser. Complete the following steps in MailChimp.

1. Check that your campaign details are correct and click **Next**.
2. Choose a template and add the image and content that you want to include. Click **Save & Close**.
3. Click **Next** and confirm that all elements in your template are correct.
   - If there's a problem click **Resolve** to fix it.
   - If you want to make a change to any element, click **Edit**.
4. Save, schedule or send your campaign.
   - To send the email straight way, click **Send** and **Send Now**.
   - To save the email and schedule a time to send it, click **Schedule**. Specify the delivery options and click **Schedule Campaign**.
   - To save the email and return to Sage CRM, click **Save and Exit** at the top of the screen. When you're ready to send it, open the campaign in Sage CRM and click **Send MailChimp Campaign**.

Viewing MailChimp campaign results

Every hour while Sage CRM is open, data from all campaigns is synchronized from MailChimp to Sage CRM so you can see updated statistics about recipient interaction with your campaign emails. If you close Sage CRM, data is refreshed only when you reopen Sage CRM. If you have a large number of campaign statistics, it could take a while to get the latest data.

1. Click **MailChimp Campaigns** on the Main menu.
2. Click a campaign hyperlink. Statistics about this campaign are displayed in the MailChimp Campaign Results panel.
3. To manually synchronize the data for this campaign, click **Refresh**.
4. Click a hyperlink to view more detailed information about any of these statistics. See the *User Guide* for an explanation of each statistic.
5. To create a contact group based on the recipients in a statistic group, click **Create New Group**. You can apply follow up actions to this group as appropriate to make your campaign even more targeted and relevant.
6. Whenever campaign statistics are updated, a communication record is created for each email recipient. Click the Communications tab for the relevant company, person, or lead record to view information about the MailChimp campaign email that they received. Click the hyperlink to open a copy of the campaign email.

Business accelerators

Management dashboard

A ready-to-use **Sales KPI for Managers** dashboard is available for CEOs. It displays key performance indicators to help you identify and measure your organization's successful activities. It includes configurable gadgets that use Sage CRM data from across your organization.
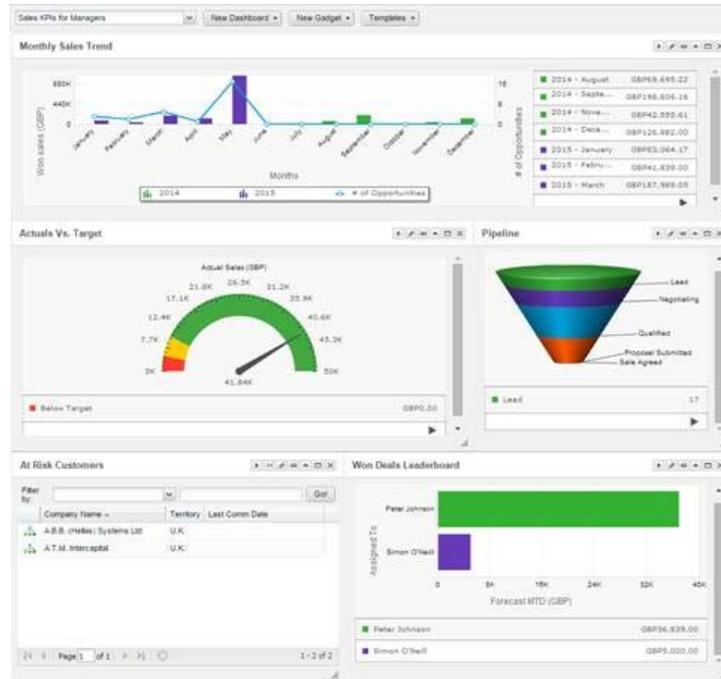
- **Monthly Sales Trends** compares the value of sales won this year with the value of sales won last year. It also shows the number of opportunities that were won this year with a trend line. It uses a combination chart.
- **Actual vs Target** shows the opportunity revenue that's been won as a percentage of forecasted sales. It uses a gauge chart.
- **Pipeline** shows information about all currently open opportunities grouped by stage. It uses a funnel chart.
- **At Risk Customers** shows customers and leads who haven't been contacted in over 90 days, or customers and leads in a company that's greater than 90 days old who've never been contacted. These customers are considered at risk of leaving your company.
- **Won Deals Leaderboard** displays the number of opportunities that each sales rep has won.

To include an opportunity in a Monthly Sales Trends, Actual vs target, or Won Deals Leaderboard report, the date in **Closed** on the opportunity record must be within the relevant time period.

# New charts and reports

New charts

Stacked

Bars are stacked on top of each other to display grouped data. It provides a wider view of data than a regular bar chart. A stacked chart is useful in an *Open Activities* activity report to show several actions that occurred on a particular day or date.


Open Activities (Dashboard)
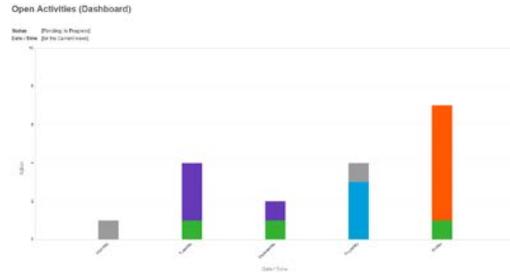
Gauge

Partitions on the chart indicate three ranges in relation to a target value; below, approaching, exceeded. The gauge needle indicates the current value. A gauge chart is useful in an *Actual vs Target* sales report to show how your actual sales compare to your forecasted sales for a particular period. You could also use a gauge chart in a customer service report to show how you're performing against your SLA target. For more information, see *Adding a gauge chart to a sales report* in the *User Guide*.

Actuals vs. Target
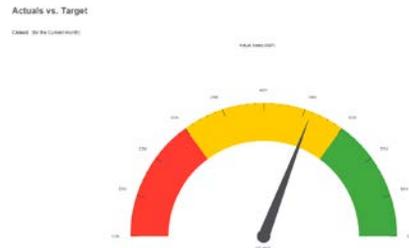
Combination

A bar chart indicates one set of data and a line chart indicates another set of data so you can get a wider view of results in one place. A combination chart is useful in a *Monthly Sales Trends* report to show information such as the revenue earned from sales and the number of sales that were closed in a particular period. You could also use a combination chart in a customer service report to show the number of cases opened compared to the number of cases closed in the system for the current year. For more information, see *Adding a combination chart to a customer service report* in the *User Guide*.

Monthly Sales Trends Dashboards)
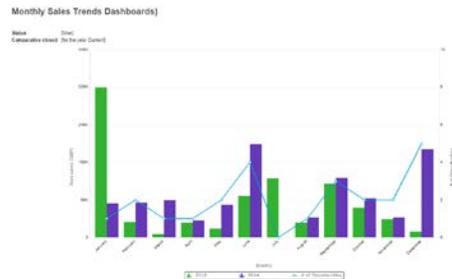
To display charts in a PDF report, Adobe Flash must be installed on the Sage CRM server.

New reports

There are three new reports. To view, edit, or run the reports, click **Reports** on the Main menu. These ready-to-use reports are configured to use the new chart types.

- **Monthly Sales Trends** compares the value of sales won this year with the value of sales won last year. It also shows the number of opportunities that were won this year with a trend line. It uses a combination chart.
- **Actual vs Target** shows the opportunity revenue that's been won as a percentage of forecasted sales. It uses a gauge chart.
- **Open Activities** displays information about calendar entries for a specific period such as demos, letters to be sent, and meetings. It uses a stacked chart.

Quick quotes and orders

You can now quickly generate a quote or order using a new default template merged with existing record details. You can print the quote or order or email it to a contact directly from Sage CRM.

Generating a quick quote or order

1. Click **New | New Quote** or **New | New Order**.
2. Alternatively, open the opportunity record or the company record for which you want to create a quick quote or order. If workflow is enabled, you might have to progress the opportunity before you can create, print, or send a new quote or order based on the record.
3. Complete the fields on the New Quote screen or the New Order screen. You can link the quote or order to a company or person using the advanced search buttons.
4. Click **Save**.
5. To preview the quote or order in a new window, click **More | Print Quote** or **Print Order**. Use the PDF buttons to print or save the quote or order.
6. To save the quote or order without printing or emailing it, click **Continue**.

Sending a quick quote or order

1. To send the quote or order as an attachment to an email, click **More | Send Quote** or **Send Order**.
2. Complete the email address and subject fields.
3. To create a completed communication record with a link to the new quote or order, complete the **Communications Options** fields, making sure you specify a team and a follow up action. A communication record is associated with each person in the specified team.
4. To add information about the emailed quote or order to an existing marketing campaign, choose the relevant campaign activity from **Wave Activity**.
5. Click **More | Send Quote** or **Send Order**.

Merge to PDF and Merge to Word

There are two mail merge output options in Sage CRM 2015 R1.

- To perform a mail merge that creates a PDF document, click **Merge to PDF**.
- To perform a mail merge that creates Microsoft Word documents, click **Merge to Word**. Your System Administrator must enable the Merge to Word option.

For more information, see *Performing a mail merge* in the *User Guide*.

Nested mail merge

You can create a nested mail merge using custom entities that are related to other custom entities. You can't create a nested mail merge using core entities. For example, you could create a nested mail merge for a custom entity called Project that includes information about a related Project Resource entity. The mail merge creates one letter for each Project that includes Project information and a table of Project Resources.

1. Open a custom entity record.
2. Click the **Documents** tab and click **Merge to Word** or **Merge to PDF**.
3. Click **Create Template** and enter template details in **File** and **Description**.
4. To insert Sage CRM merge fields, select the fields from **Insert Sage CRM Field**.
5. To include a table with merge fields, click **Insert Nested Region**. This inserts the start and end tags for the main table and the child table. To display a row of Project Resource data, the first column in that row must include a TableStart:< ProjectResource> tag, and the final column must include a TableEnd:< ProjectResource> tag. **Important: You must include TableStart and TableEnd in the same template section, table row or table cell even if you're not using line items.**

6. Click **Save Template**.
7. To continue with a merge, click **Merge and Continue**.

Security enhancements

- The top menu displays the date and time of your **last log on**.
- When you click **<My Profile>**, you can view your **Recent Activity**. The last five days of activity are listed and include the time, location, browser, device, and IP address for each log on.

Mobile enhancements

There are three main mobile enhancements in Sage CRM 2015 R1.

- The optimized mobile themes have been rolled into the **Sage CRM Mobile** theme that looks the same on an iPhone, Android smartphone, and tablet. The Sage CRM Classic Mobile theme is still supported for IE mobile devices and Blackberries.
- Sage CRM Sales Lite has been renamed as **Sage CRM for iPhone** and has an updated UI. It also has some new functionality; you can add new meetings or tasks through the app, and import an iPhone contact as a lead or a person into Sage CRM. Your System Administrator can create custom fields that appear in Sage CRM for iPhone.
- **Sage CRM for Android** lets you add new meetings or tasks through the app, and import an Android contact as a lead or a person into Sage CRM. Your System Administrator can create custom fields that appear in Sage CRM for Android.

For more information, see the *Mobile Guide*.

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About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success

Accelerate your business success with a free 30-day trial at www.sagecrm.com.

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