



What's New in SageCRM v6

A breakthrough release that enhances usability, security, and information access

SageCRM v6 features even better CRM functionality, making SageCRM easier to use than ever before. The all new Training and Coaching area provides step-by-step instructions to users on how to get started with SageCRM. It also provides tips on how to perform tasks, making SageCRM the most user-friendly and intuitive CRM product available today. Usability has also been enhanced through simplified Field Level Security, code-free territory management and realignment, improved data segmentation, and an even more powerful search engine.

The new and enhanced features in SageCRM v6 combine to make SageCRM even more easy to use and intuitive than before, delivering best-in-class CRM to your business.

BENEFITS

Built-in training and coaching tools equip users with fundamental SageCRM skills, enhancing adoption

A powerful search engine makes finding the right information a snap

Improved security features improve the usability of the product's security restrictions

New data segmentation functionality gives Sales and Marketing teams better control

A more flexible Territory Tree provides a simplified, code-free way to manage and realign territories



◀ New Training and Coaching tools in SageCRM v6—including quick tips, videos, wizards, and more—help users become more proficient with the software and improve user adoption.



◀ SageCRM Dashboards enable users to create personalized views of the information that's most relevant to them. With instant access to timely reports and other information, your sales, marketing, and service professionals can work more strategically.

About SageCRM

SageCRM is an easy-to-use, fast-to-deploy, feature-rich Customer Relationship Management solution with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a Web browser.

Feature	Description	Benefit
Training and Coaching	SageCRM v6 now offers a Quick Start tab that provides easy access to built-in, on-screen coaching tools including: • A suite of videos to compliment product documentation. • User and administration wizards assist with setting preferences. • Quick tips on recurring themes to educate users as they navigate SageCRM. • Educational coaching captions throughout the solution ensure that users are aware of what they are working on at all times. • Links to documentation for users and administrators ensure that relevant information is accessible at all times.	Enhances the user experience, making it more intuitive and user friendly, resulting in more efficient users. Reduces adoption and deployment times through education. Eliminates confusion and intimidation while fostering a culture of learning.
Advanced Search	SageCRM v6 contains a flexible and powerful Advanced Search engine. It is now possible to search for communications and by keywords. The entire Find interface has been redesigned to improve usability even further. Advanced Find also supports nested statements so "and/or" searches can be conducted. Users can now build their own search queries by specifying fields and values with the Advanced Query functionality, which means searches can be conducted against the data in reports.	Provides the ability to find information easily and speedily, enabling users to work faster and be more productive.
Data Segmentation and Groups	New Data Segmentation functionalities and a new Groups tab within My CRM have been launched with SageCRM v6. In SageCRM, Groups are sets of companies, people, opportunities, etc. The Groups functionality is intended to provide users with the ability to organize these records based on common characteristics. Users can work with the Groups from a central point, or from other areas in the system, and have the ability to perform actions including mailers, mass emails, alerts, mail merges and mass record updates. SageCRM now has the ability to save both static and dynamic groups, which can remain unchanged or be automatically updated.	Making Groups available through My CRM means users and marketing personnel alike can access these lists. Mass Updates allow users to update Group records in one easy step. Enables better data segmentation for use by Sales or Marketing in marketing campaigns. Records can be added to Groups so there is no need to go back and rebuild them.
Territory Management and Realignment	SageCRM v6 features an improved, more flexible Territory Tree. Moving and/or merging territories can be done easily via the Administration area.	Offers a simplified code-free way to manage and realign territories.
Simplified Field Level Security	SageCRM v6 has made Field Level Security even more simple and convenient to use by removing the requirement for code. Security on fields is now applied using checkboxes on a once-off basis at the Field Level, rather than at the screen level, and can be applied to users, teams or profiles. Field Level Security applies security throughout the product including screens, lists, reports and so on.	This feature improves the usability of the product's security restrictions while simultaneously ensuring that the product remains secure.

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

