



SageCRM

SageCRM 6.1

What's New Guide

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# Chapter 1

## Introduction

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### Who this guide is for

This guide is for Sage CRM partners and customers who want to find out about the new features of the Sage CRM 6.1.

The Sage CRM 6.1 Integration features are documented in the *Integration User and Administration Guide*, and in the *Integration Developer Guide*.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac, and Softline Accpac CRM.

The cross-referenced documents in this guide are available with the 6.1 release.

### Summary of Features

The 6.1 features described in this guide include:

- Quotes and Orders
- Outlook Integration Enhancements
- Button Groups
- Calendar Day View layout
- Field Delete
- Customizing through the .NET framework
- MS Windows Vista support
- 64 bit operating system support



# Chapter 2

## Quotes and Orders

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The following features are new to CRM:

- Quotes and orders have been split into two separate tables.
- Quotes and orders support all the features of main entities, for example Find, New, and Keyword Search.
- Add free text line items and comments to quotes and orders.

This chapter takes you through a brief snapshot of how you can work with these features.

### Who can I log on as?

To review the new quotes and orders features you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales

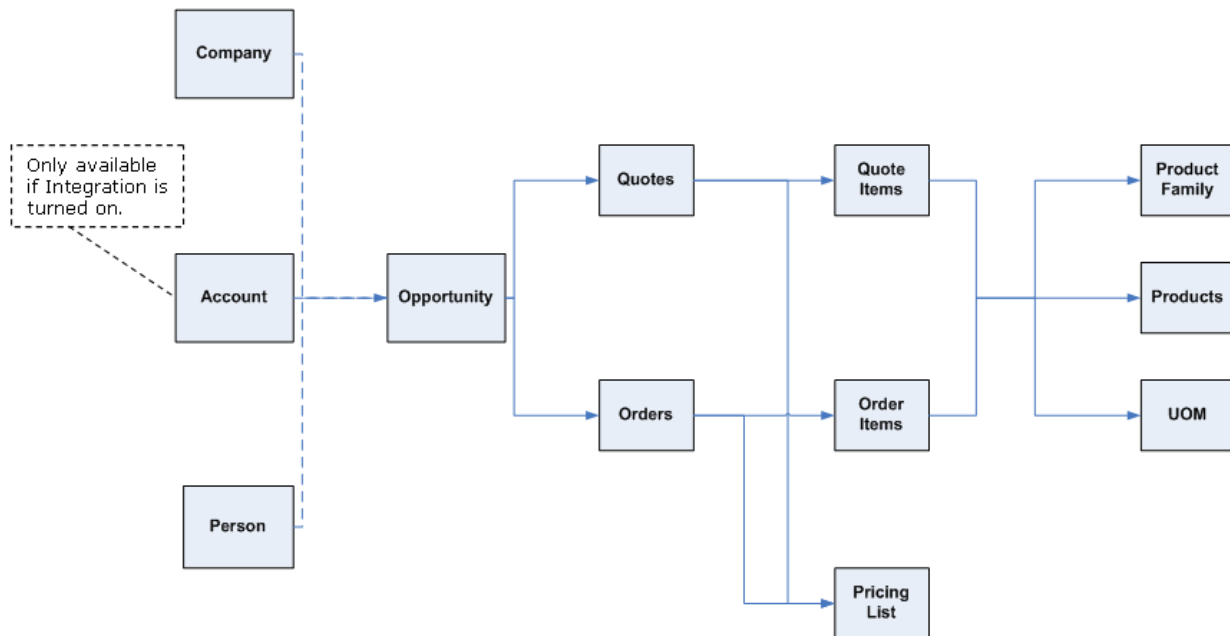
This user does not require a password.

## What is the new quotes and orders schema?

The “OrderQuote” table, which was a secondary entity in 6.0 and earlier, has been split into two tables. Quotes and Orders are now separate tables with their own line items, and represent two distinct main entities.

Legacy quotes and orders will still be available for normal use after upgrading.

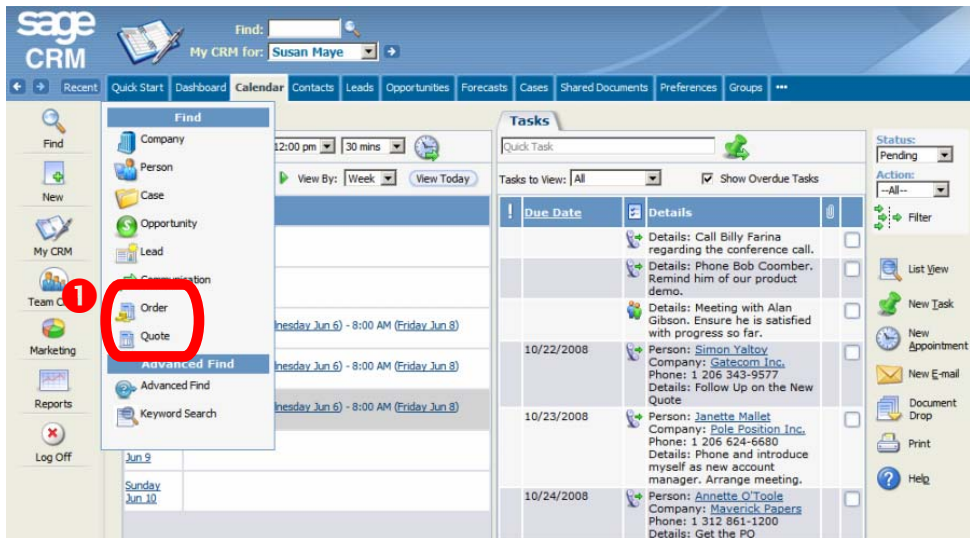
The following diagram illustrates the new schema:



## Can I search for quotes and orders?

Yes. Quotes and orders behave like all the other main entities. You can access quotes and orders from the Find and New menu buttons, and carry out Keyword and Advanced searches on quotes and orders.

To search for a quote:



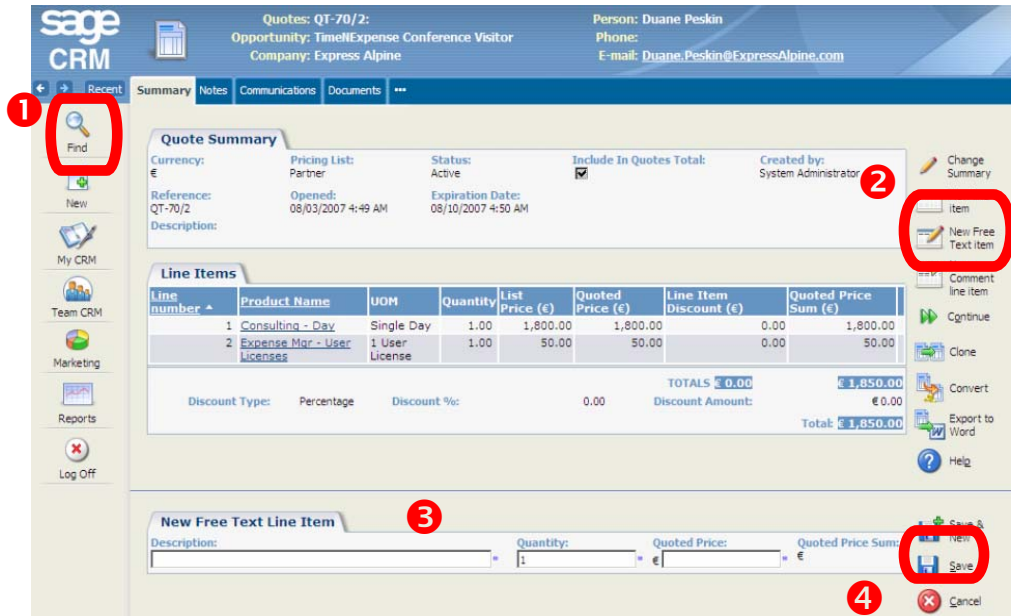
1 Find | Quote.

The Quote Find page is displayed.

## Can I add products to an order that are not in the price list?

Yes. You can add a free text line item to a quote or an order. You can also add free text comments to existing line items.

To add a free text line item to a quote:



- 1 Find and open an existing quote.
- 2 Select the New Free Text Line Item button.
- 3 Add a Description, Quantity, and Price for the line item. These line items will be included on the printed quote.
- 4 Select the Save button.

The free text line item is displayed in the list of line items.

Use the New Comment Line Item action button to add a free text comment, for example, to add extra information about another line item in your quote. You can add a Line Number and a Description. For example, if you add the Line Number 2, then the comment will be positioned as the second line item. If you have already selected other line items, their line item numbers will be resequenced. Comment line items will be included on the printed quote.

# Chapter 3

## Outlook Integration Enhancements

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The following features are new to CRM:

- New Outlook plugin install procedure.
- Display the CRM menu buttons within Outlook.
- View filed e-mails immediately after filing.
- Set synchronization deletion notifications.
- New conflicts window.
- New reset synchronized data function.
- New options for managing updates.
- Synchronize from Outlook to CRM only.

This chapter takes you through a brief snapshot of how you can work with these features.

### Who can I log on as?

To install the Outlook plugin, to set synchronization deletion notifications, to view the CRM menu buttons within Outlook, to view and use the new conflicts window, to reset synchronized data, or to view filed e-mails, you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales

This user does not require a password.

To set new options for managing updates, or to set up synchronization from Outlook to CRM only, you can log onto CRM as:

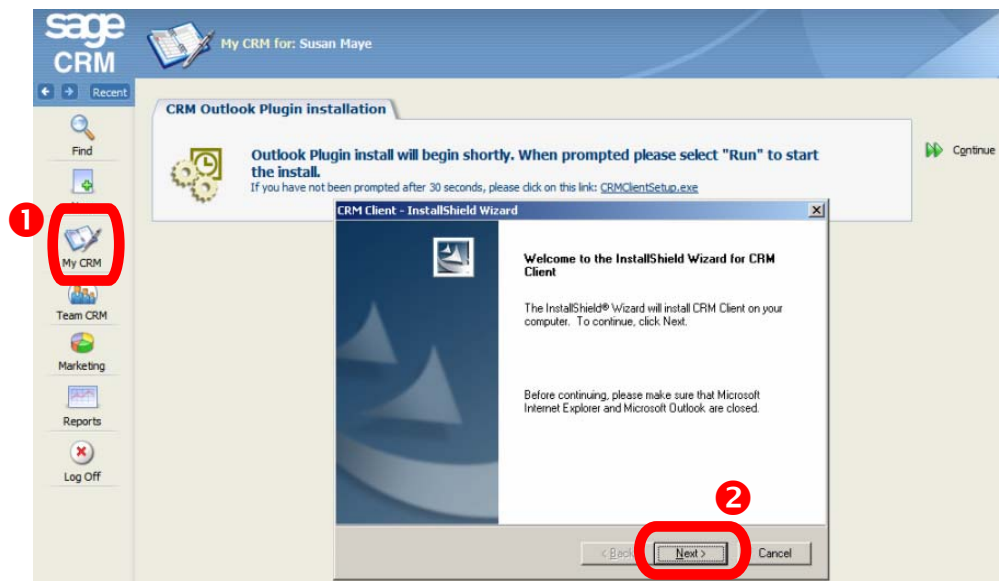
Name	User Name	Profile
System Administrator	Admin	Administrator

This user does not require a password.

## How has the Outlook plugin install procedure changed?

The Outlook plugin installation procedure has been improved to provide added security and to facilitate use of the Outlook plugin with CRM running on MS Vista.

To install the Outlook plugin:



- 1 Select My CRM | Preferences.

The User Preferences page is displayed.

- 2 Select the Install CRM Outlook Integration button.

The File Download dialog box is displayed.

Run the download file and follow the install steps of the wizard.

If the plugin has already been installed by another user on the current client, the File Download dialog box is skipped and the CRM Client InstallShield Wizard will run automatically to take you through the procedure for installing the Outlook plugin.

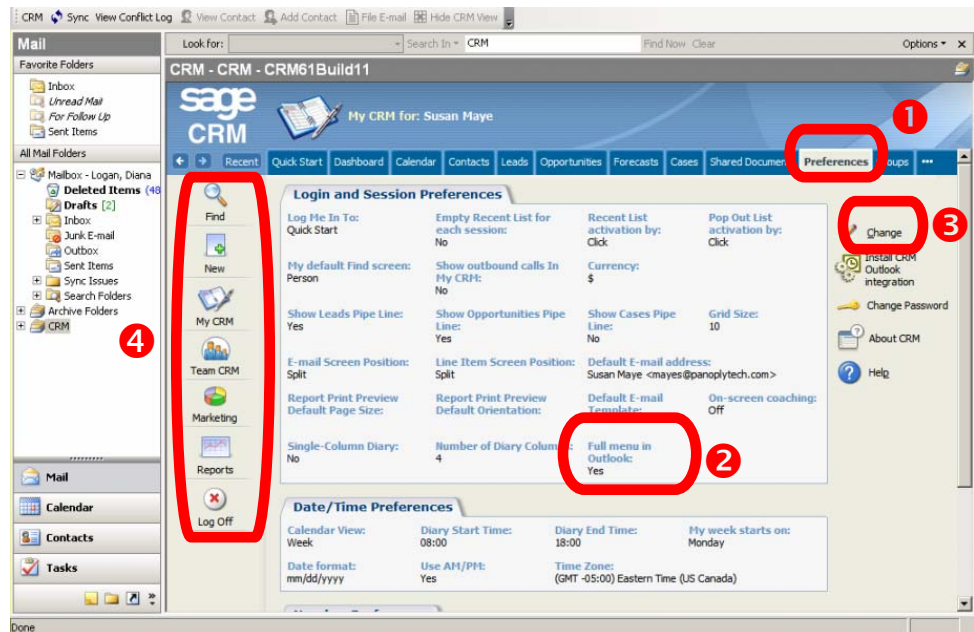
**Note:** Outlook and IE must be closed to complete the plugin installation.

## Can I use the CRM menu buttons within Outlook?

Yes. The default navigation for CRM Outlook Integration is configured to maximize the space you have to view CRM within Outlook. The Menu buttons appear as subfolders under the CRM folder or as icons in the CRM group, and the CRM forward and back buttons are replaced with icons to initiate the Find and New Pop Out lists.

In 6.1 you can choose between the space-optimizing navigation described above or the usual menu and navigation buttons on the left-hand side of the CRM page. These can now be activated via the Full Menu In Outlook setting in My CRM | Preferences.

To show the CRM menu buttons and the forward and back buttons within Outlook:



- 1 Select My CRM | Preferences and click on the Change button.
- 2 Select Yes in the Full Menu In Outlook field.
- 3 Click on Save
- 4 Refresh the view to apply the new setting.

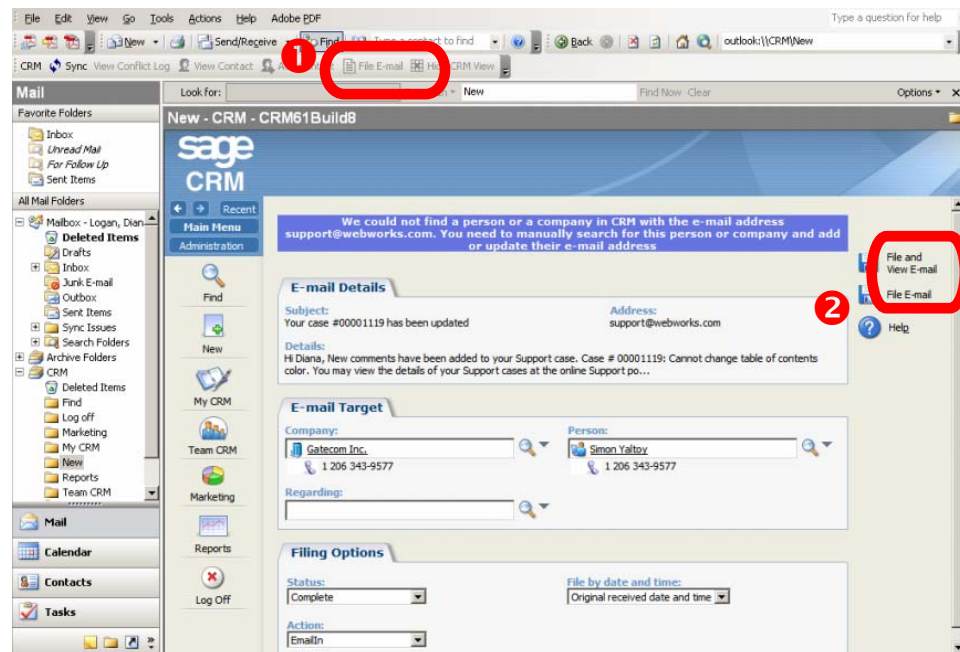
## Can I easily reply to an e-mail once I've filed it?

The usual CRM menu and navigation buttons are displayed.

## Can I easily reply to an e-mail once I've filed it?

Yes. There is a new File And View E-mail button when you file a single e-mail from Outlook to CRM. When filing multiple e-mails, the Communications tab of the Person you e-mailed, is displayed.

To file and view an e-mail:



- 1 Highlight the e-mail you want to file, and select the File E-mail button.

The File E-mail page is displayed.

- 2 Select the File And View E-mail button.

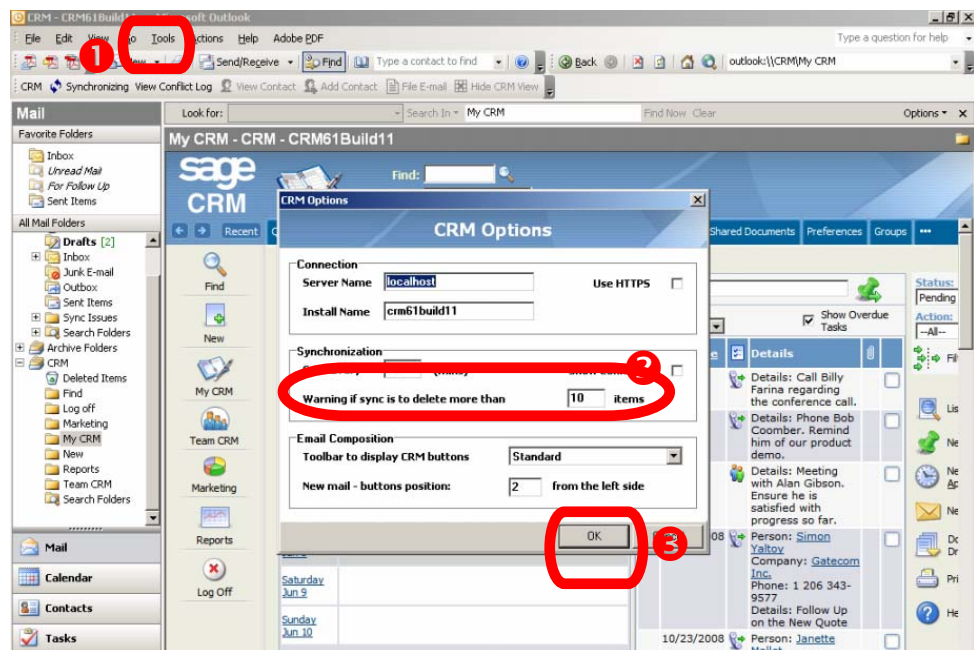
The E-mail In page is displayed. You can send a reply or carry out other actions on the e-mail directly from this page

## How do I know when items are going to be deleted during synchronization?

When you delete items (appointments, tasks, or contacts) in Outlook, these items are deleted in CRM when you next synchronize. You can now set a notification to display when over a specified number of items are to be deleted as part of the synchronization between Outlook and CRM.

**Note:** This feature applies if the Administration | Users | User Configuration setting, Synchronize Outlook Deletions, is set to Yes.

To set the synchronization delete notification:



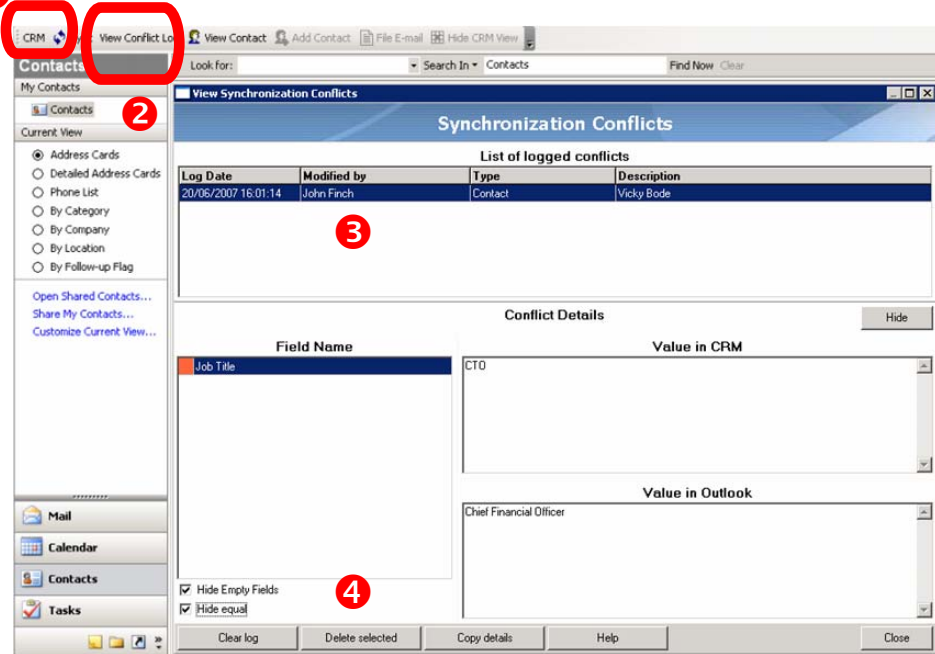
- 1 In Outlook, select Tools | CRM | Options.  
The CRM Options dialog box is displayed.
- 2 Check the number in the Warning If Sync Is To Delete More Than field. It defaults to 10.  
Change the number to, for example, 15.
- 3 Click on OK.

A dialog box will be displayed if more than 15 records in CRM are going to be deleted as a result of a synchronization. You can then decide to proceed with the deletions or to stop them.

## What is the new conflicts window?

When conflicts arise during synchronization between Outlook and CRM, you can view the precise conflicts down to field level using the new CRM Synchronization Conflicts window. The conflicts window shows all conflicting items and then allows you to filter conflicting fields within each conflicting item.

### 1 To use the new conflicts window:



1 Click on the CRM button in Outlook and log on to CRM.

2 Select the View Conflict Log button.

The Synchronization Conflicts window is displayed.

3 Select the conflict you want to view in the List Of Logged Conflicts panel.

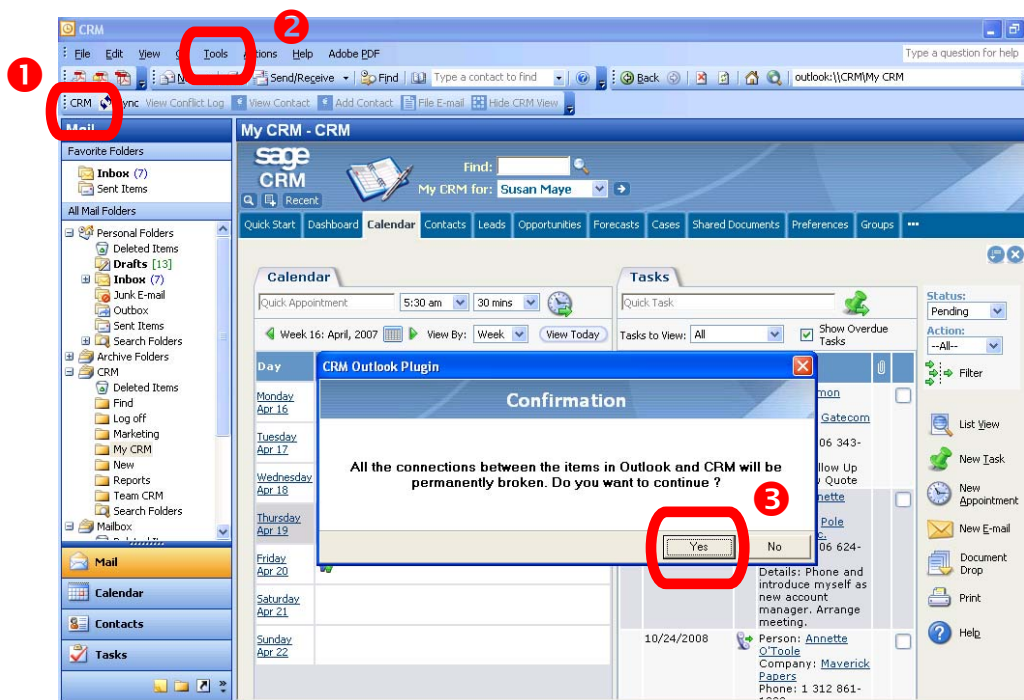
Details are displayed in the Conflict Details panel. The values displayed on the right-hand side of the Conflict Details panel show the values before the synchronization took place.

4 To show fields that are empty and fields where the values are equal in both Outlook and CRM, you can clear the Hide Empty Fields and Hide Equal check boxes. The Copy Details button copies the Outlook value to the clipboard so that it can be reinstated if required.

## Can I reset my synchronized data after an Outlook error?

Yes. When you synchronize between Outlook and CRM each synchronized item is mapped using identification tags. If there is an error in Outlook, the identification tags could be changed and the mappings would be lost. When using CRM within Outlook, you can now reset your synchronized mappings after a system error. The reset clears all previous mappings and the first synchronization after the reset returns the system to the state it was at when you first synchronized after installing the plugin. This involves re-mapping all contacts, appointments, and tasks that were changed in the last two weeks.

To reset synchronization connections:



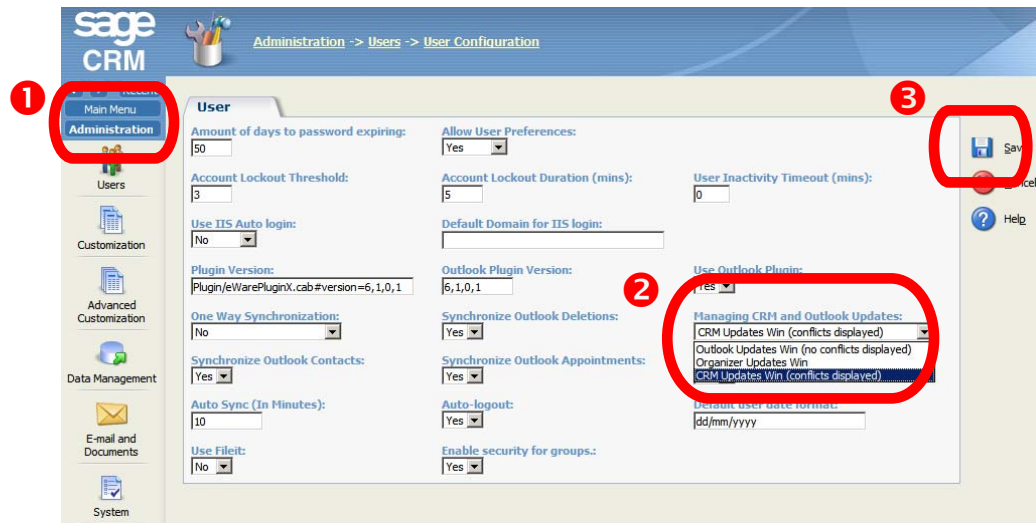
- 1 Click on the CRM button in Outlook and log on to CRM.
- 2 Select Tools | CRM | Sync Info Reset.
- 3 Click Yes on the confirmation message to continue.

All connections between items in Outlook and CRM will be permanently broken. Once the reset has completed, click on the Sync button to re-map your contacts, appointments, and tasks.

## What options can I choose from for managing synchronization conflicts?

As a System Administrator, you can select rule-sets for managing conflicts that arise during synchronization.

To select a synchronization conflict rule-set:



1 Select Administration | Users | User Configuration, and click on the Change button.

2 Select a synchronization option from the Managing CRM And Outlook Updates drop-down menu.

**Outlook Updates Win (No Conflicts Displayed).** The changes made to Outlook will appear in both Outlook and CRM. No conflict is added to the Conflict log. This is the recommended option for organizations that use Outlook as their primary appointment scheduling tool.

**Organizer Updates Win.** This only applies to Appointments. The Organizer refers to the person who created the meeting in Outlook. If any users update the same record in both systems and the Organizer synchronizes, then the system behaves as per the Outlook Updates Win setting. If any users update the same record in both systems and an "Attendee" synchronizes, then the system behaves as per the CRM Updates Win setting.

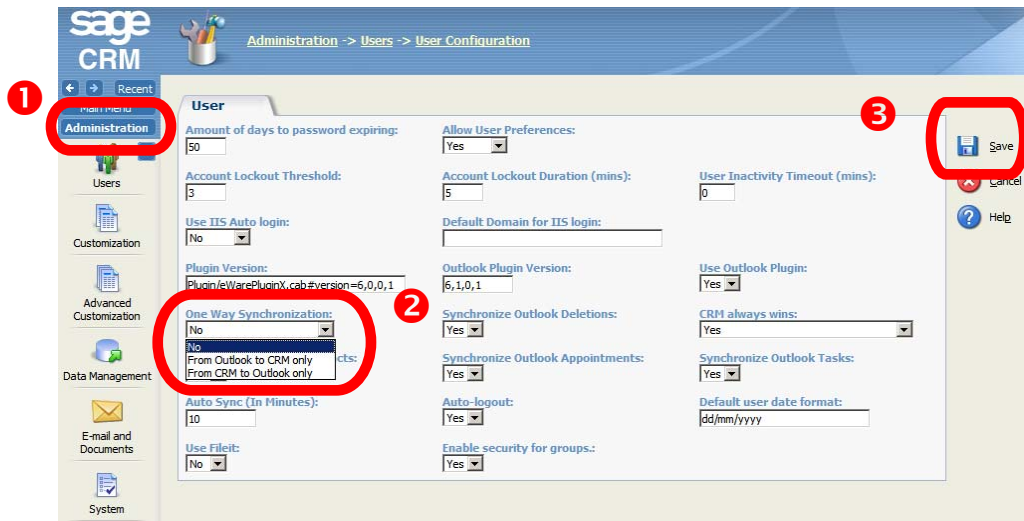
**CRM Updates Win (Conflicts Displayed).** Changes made to CRM appear in both Outlook and CRM. A conflict is added to the Conflict log. This is the recommended option for organizations that use CRM as their primary appointment scheduling tool.

3 Click on Save.

## Can I synchronize from Outlook to CRM only?

Yes, as a System Administrator you can now set synchronization to occur from Outlook to CRM only. Previously, you could select either two-way synchronization or synchronization from CRM to Outlook only.

To set up Outlook to CRM only synchronization:



- 1 Select Administration | Users | User Configuration, and click on the Change button.
- 2 Select the From Outlook To CRM Only option from the One Way Synchronization drop-down menu.
- 3 Click on Save.

## Where can I get more information?

More information on this feature is available in the:

- *User Guide*
- *System Administrator Guide*

# Chapter 4

## Button Groups

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The following new button group functionality is available in version 6.1:

- Creating button groups.
- Adding buttons to button groups.
- Viewing button groups.
- Limiting access to button groups.

This chapter takes you through a brief snapshot of how you can work with these features.

### Who can I log on as?

You will need an EIS (Enterprise Integration Server) or DPP (Development Partner Program) license to work with button groups. To create button groups, add buttons to a button group, or limit access to a button group, you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

This user does not require a password.

To view button groups, you can log onto CRM as:

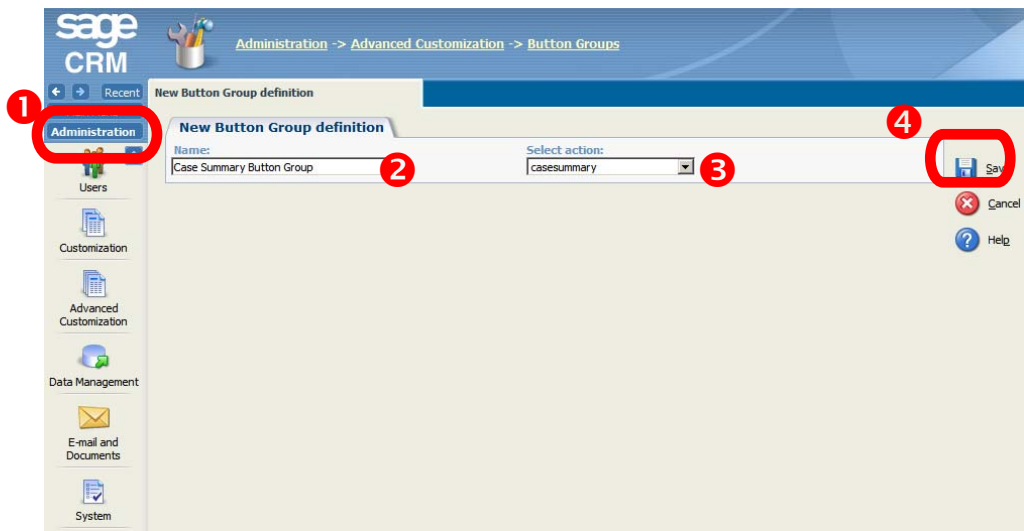
Name	User Name	Profile
Susan Maye	MayeS	Sales

This user does not require a password.

## How can I create a button group?

You can define button groups that will appear on specific CRM screens and which will give users access to custom functionality created by you. For example, say you want to add custom ASP pages to the Cases Summary screen so you can give users access to extra information relating to the management of cases in your company. You can create a button group that will act as a place holder for displaying buttons on the Case Summary screen.

To create a button group:

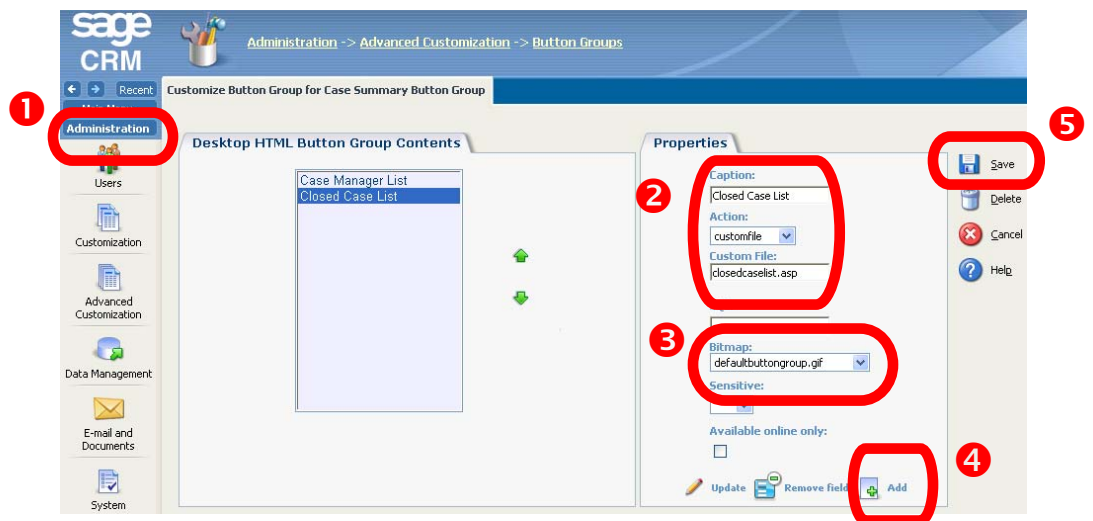


- 1 Select Administration | Advanced Customization | Button Groups.  
The Button Groups list is displayed. Click on the New button. The New Button Group Definition page is displayed.
- 2 Type the name of the new button group in the Name field. For example, Case Summary Button Group.
- 3 Select the CRM screen you want the button group to display on from the Select Action drop-down list. For example, casesummary.
- 4 Click on the Save button.  
The new button group is displayed on the Button Groups list.

## How can I add buttons to a button group?

Once you have created a button group you can add buttons to it that will display on the relevant CRM screen. For example, say you have created two ASP pages relating to case management, one that will provide a current list of who is responsible for all live cases and a second one that provides a current picture of all recently closed cases. You have created a button group called Case Summary Button Group and you would like to add two buttons to this group, each of which will bring the user to one of the newly created ASP pages.

To add a button to a button group:



- 1 Select Administration | Advanced Customization | Button Groups.  
The Button Groups list is displayed. Click on the Customize button for the Case Summary Button Group.
- 2 Type the name of the new button in the Caption field, for example Closed Case List, and select Customfile from the Action drop-down list. Type the name of the associated ASP file in the Custom File field, for example, CLOSEDCASELIST.ASP.
- 3 Select the image you would like to display with the button caption from the Bitmap drop-down list. For example, DEFAULTBUTTONGROUP.GIF.
- 4 Click on the Add button. The new button is displayed in the Desktop HTML Button Group Contents area. You can use the up and down arrows to position a new button relative to other buttons you have created.
- 5 Click on the Save button. The new buttons are displayed on the summary screen for any case.

## What does a button group look like?

Once you have added buttons to a button group the buttons will appear automatically on the relevant CRM screen. Say you have added two new buttons to a newly created button group on the Case Summary screen. You can view the new button group by opening the Case Summary page for any case.

To view a button group:



- 1 Select Find | Case. Search for and open any case.

The Case Summary page is displayed.

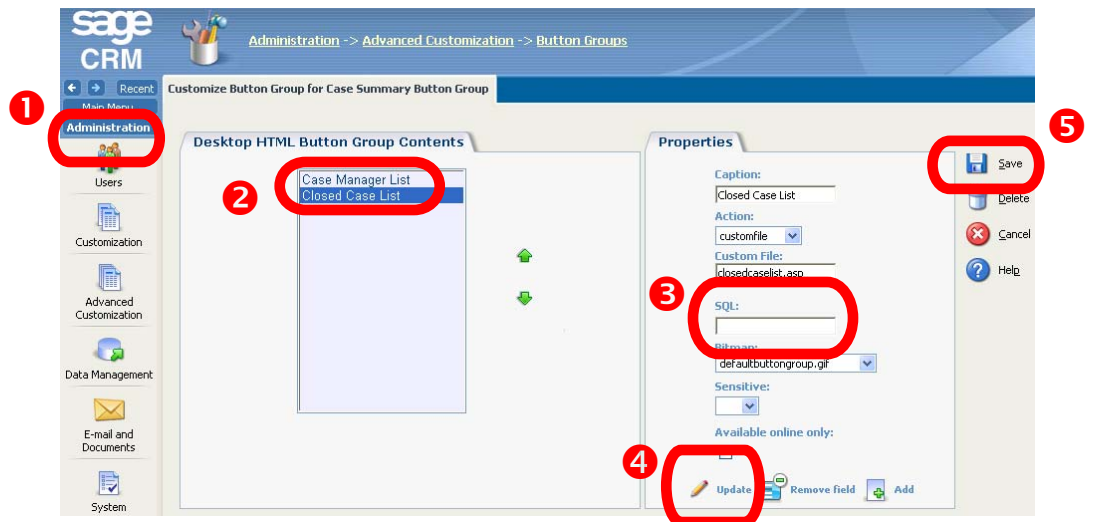
- 2 The new button group is displayed on the right-hand side of the page above the Help button.

## Can I limit access to button groups?

Yes. When creating or editing a button group, you can use an SQL statement to limit access to individual buttons in that group. For example, you might want to restrict access to buttons in the Case Summary Button Group on the Case Summary screen to members of the Customer Service team. In this example, the Case Summary Button Group would be displayed on the Case Summary page for members of the Customer Service team only.

**Note:** Buttons in the button group take a user's existing security rights into account. For example, a user must have at least View rights to Cases to be able to open a button group which displays a list of cases.

To limit access to a button group:



- 1 Select Administration | Advanced Customization | Button Groups.

The Button Groups list is displayed. Click on the Customize button for the Case Summary Button Group.

- 2 Select the button to which you want to limit access in the Desktop HTML Button Group Contents area.

- 3 Type the limiting SQL statement in the SQL field. For example, **User\_PrimaryChannelId=3**

- 4 Click on the Update button.

- 5 Select Save.

## Where can I get more information?

More information on this feature is available in the:

- *Developer Guide*

# Chapter 4

## More Features

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The following additional features are new to CRM:

- New style daily calendar view.
- Field delete.
- .NET framework for CRM customization work.
- MS Windows Vista support.
- 64 bit operating system support.

This chapter takes you through a brief snapshot of how you can work with these features.

### Who can I log on as?

To change the appearance of the calendar day view, to use CRM on MS Windows Vista, or to install and use CRM on a 64 bit operating system, you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales

This user does not require a password.

To delete fields, you can log onto CRM as:

Name	User Name	Profile
System Administrator	Admin	Administrator

This user does not require a password.

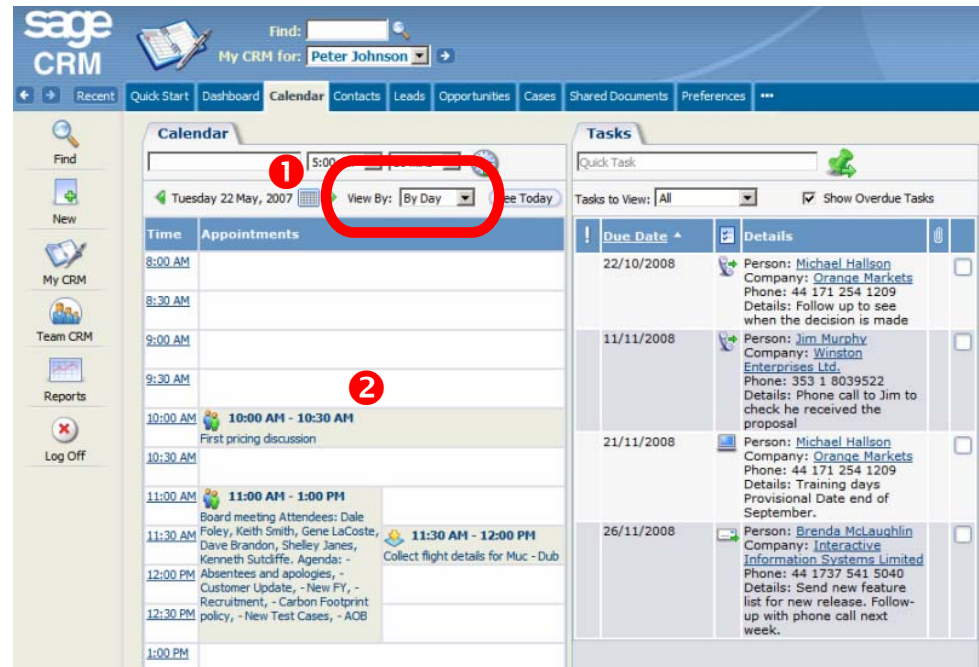
To use the customize CRM using the .NET SDK you need an EIS or DPP license key.

## Can I change the appearance of the calendar day view?

Yes. You can now change the appearance of the calendar day view in CRM. You can maintain the existing CRM view, or you can set the calendar day view to display in a new Outlook-type view. The new view organizes appointments and tasks in columns within the day view, as opposed to displaying them on top of each other in the existing CRM view.

Displaying items in columns can be great when you have a small number of concurrent items. However, if you have more than say four items displayed in this way, each individual column will be limited in the information it can display. To avoid this, you can set CRM to revert to the existing CRM day view if there are more than the number of columns that you have specified in the My CRM | Preferences | Number of Diary Columns field.

To display the new calendar day view:



- 1 Select My CRM | Preferences, and check that the Single-Column Diary field is set to No. Then select My CRM | Calendar, and make sure you are in Daily View.
- 2 The calendar is displayed in the new Outlook-style view.

## Can I delete CRM fields?

Yes. You can delete custom fields in CRM - i.e. any new fields, which you have added in version 6.1 onwards. However, caution is advised when updating the database. It is recommended practice that all users are logged off CRM when a field deletion is taking place, and a backup of the database is available. Deleting a field is not reversible. If a mistake is made, restoring the database backup is recommended.

If the field you wish to delete is not being used anywhere in the system, you will be asked to confirm that you want to delete the field. If the field is in use within CRM, you will be presented with either a warning or a refusal to delete. A warning is a notification that the field is in use elsewhere in the system (in screens, lists or searches). You can still go ahead and delete the field if you wish. If the field is being used in reports, scripts, views, groups, escalations, notifications, workflow, tab SQL, or dashboards you will be refused permission to delete.

To delete a custom field in the Company entity:



- 1 Select Administration | Customization | Company.

The Fields tab is displayed. Click on a hyperlink to open the field you want to delete.

The Change Database Field Properties page is displayed. Click on the Delete button. A warning is displayed to inform you that the field is being used in the CompanyGrid list.

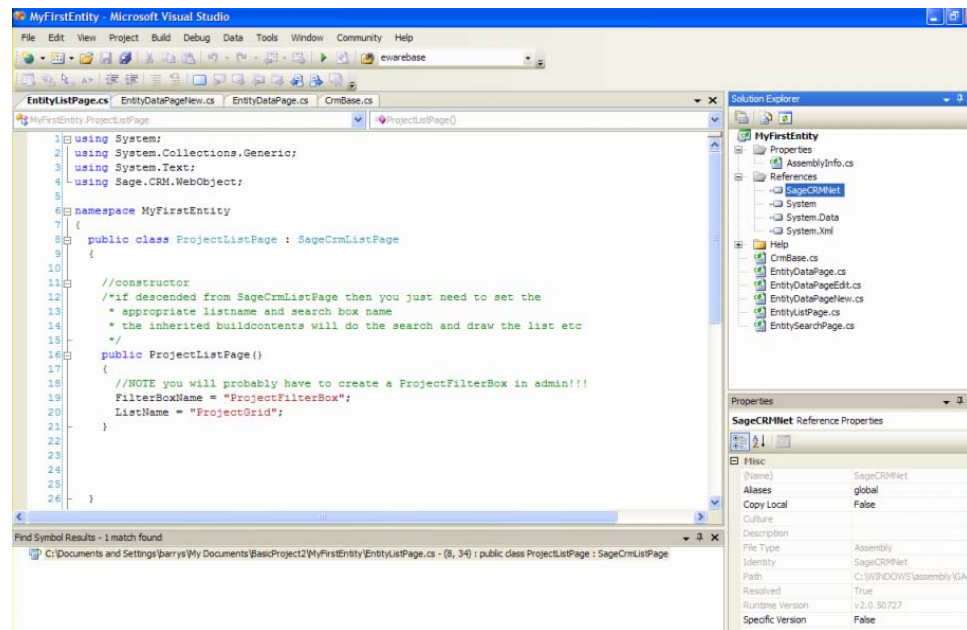
- 2 If you are sure you want to delete this field, select the Confirm Delete button.

## Can I customize CRM through the .NET framework?

Yes. The implementation of the Sage CRM .NET application protocol interface (API) allows developers to write applications that can utilize the functionality provided by Sage CRM.

The implementation of this API is supported by the tools offered by the Sage CRM .NET SDK (Software Development Kit). The SDK encompasses the templates for Visual Studio projects, the skeleton C# code generated by those templates, and the CRM class library that can be accessed using developer-written code. Solutions created in Visual Studio are compiled as dynamic link libraries (DLLs). These DLLs can be copied to Sage's Custom DotNet folder.

### Extending CRM using .NET SDK:



To develop applications with the Sage CRM .NET SDK, you will need:

- CRM installed on a server with a developer license key.
- The .NET Setup package comprising the CRMDOTNETSETUP.MSI file and the SETUP.EXE executable.
- Visual Studio 2005.

Servers on which compiled .NET Application Extensions are deployed require:

- Sage CRM 6.1 installation with a developer license key.
- .NET Framework 2.0.

## Can I use CRM on MS Windows Vista?

Yes.

However, please note that:

- The CRM server needs to be set as Trusted Site in Vista, if a client machine is running CRM on Vista.
- Solo clients are not supported on Vista.
- Advanced Search Select icons are not visible in CRM on Vista.
- The Outlook plugin cannot be uninstalled when User Account Control (UAC) is enabled in Windows Vista. To uninstall the plugin, a user with administrator privileges must temporarily disable UAC. After uninstalling, the administrator can re-enable UAC.

### CRM on MS Windows Vista:

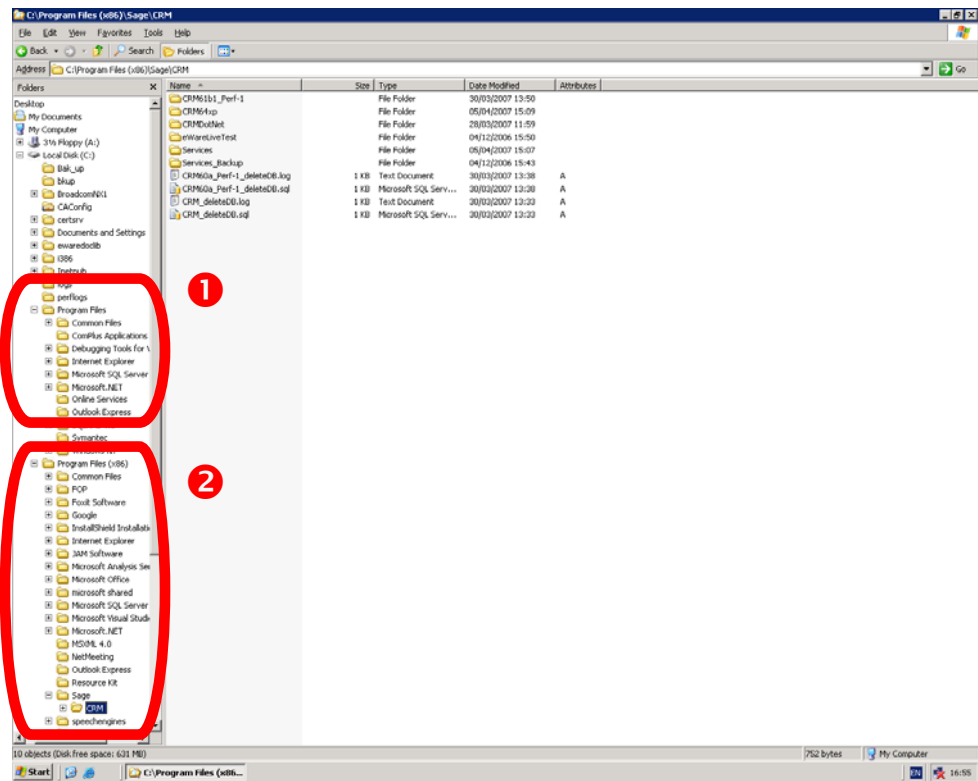


## Can I install and use CRM on a 64 bit operating system?

Yes. Some operating systems currently use 64 bit install. While CRM is a 32 bit application it can be installed on a 64 bit operating system. There is no difference to the user experience of CRM while running on a 64 bit operating system.

The only significant difference between CRM on a 32 bit operating system and CRM on a 64 bit system is the install location. On a 64 bit operating system, CRM will install to the default location for a 32 bit application on a 64 bit system. This may not necessarily be the Program Files directory.

### CRM install location on a 64 bit operating system:



- 1 The Program Files directory.
- 2 The Program Files (x86) directory.

This is the default install location for CRM on this 64 bit MS Windows Server 2003 operating system.

## What other new features have been added?

Several other new features have been added in version 6.1. These include:

- Sage CRM Integration
- Synchronize Solutions in Solo

## Where can I get more information?

More information on the features described in this chapter is available in the:

- *User Guide*
- *System Administrator Guide*
- *.NET SDK Guide*
- *Sage CRM Integration Developer Guide*
- *Sage CRM Integration User and Administration Guide*