sage

CRM

Sage CRM 6.2 SP1

What's New Guide

Contents

Chapter 1
Introduction

Who this guide is for

This guide is for Sage OpCos, Sage CRM partners, and Sage CRM customers who want to find out about the new features of Sage CRM 6.2 SP1.

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.

Summary of Features

The 6.2 SP1 features described in this guide include:

- Quote and Order enhancements
- Account Entity enhancements (Integration systems only) including:
  - Address Sharing
- More features including:
  - Link and Synch enhancements (Integration systems only)
  - Terminal Services

Chapter 2
Quote and Order Enhancements

The following new quote and order functionality is available in version 6.2 SP1:

- Customize Quote and Order Item grids.
- Message is displayed when converting an expired quote.
- Open the summary of a quote or order from a group list using the Reference hyperlink.
- Access quotes and orders from the Recent list – even if no description has been added.
- Create a new quote or order template during a quote or order merge.

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

Who can I log on as?

To customize quote and order grids you can log onto CRM as:

Name	User Name	Profile
System Administrator	Admin	Administrator

This user does not require a password.

For all other quote and order enhancements you can log onto CRM as:

Name	User Name	Profile
Susan Maye	MayeS	Sales Manager

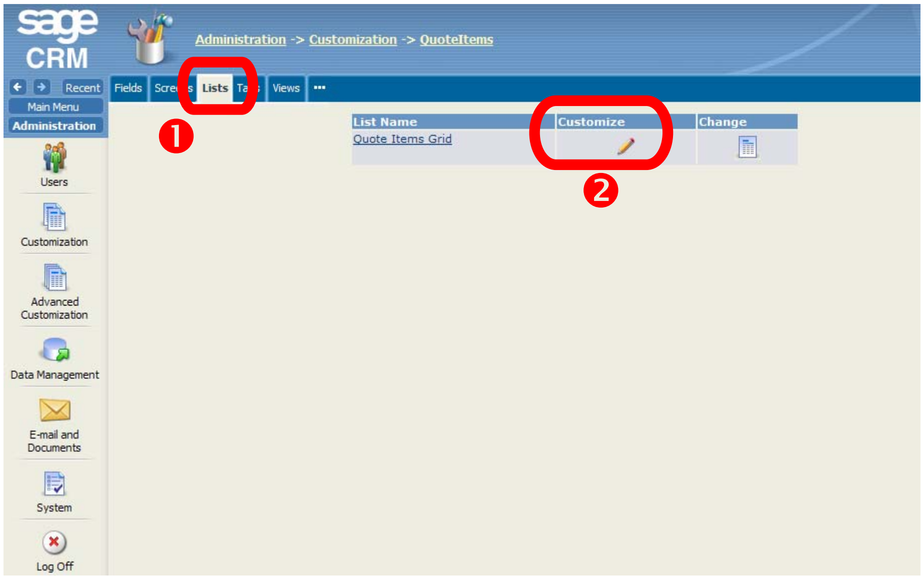
This user does not require a password.

Can I remove the list price from the Quote Items Grid?

Yes. You can change columns on the Quote and Order Items grids.

Note: It is recommended that the first four columns (Line #, Synch Status, Line Type, and Product Name) are maintained in their current state. Making changes to any of the columns should be carried out with care, particularly in the case of Integration systems.

To customize the Quote Items Grid:



❶ Select Administration | Customization | Secondary Entities | Quote Items | Lists.

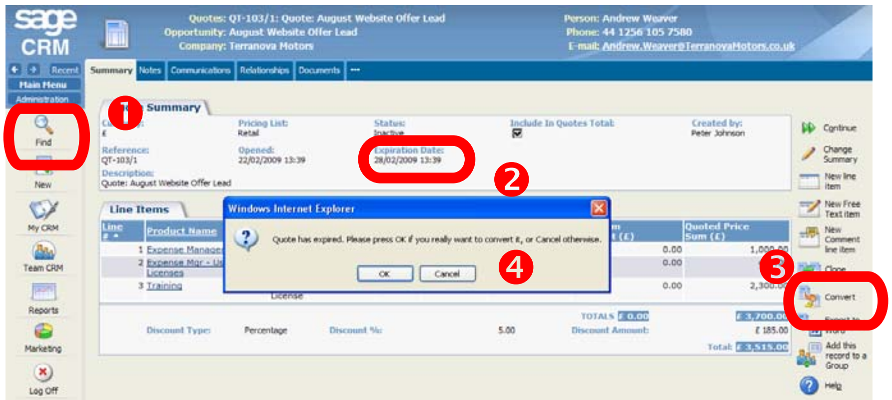
❷ Click on the hyperlink of the Quote Items grid.

The Maintain List Definition page is displayed, where you can make changes to the columns. To change the Order Items grid, follow the same procedure, selecting Order Items from the Secondary Entities drop-down.

Can I convert an expired quote to an order?

Yes. The Convert (to order) button can be selected even if the quote has expired, however a message is displayed to the user.

To convert an expired quote to an order:



❶ Select Find | Quote, and click on the hyperlink of the quote.

❷ Check the Expiration Date.

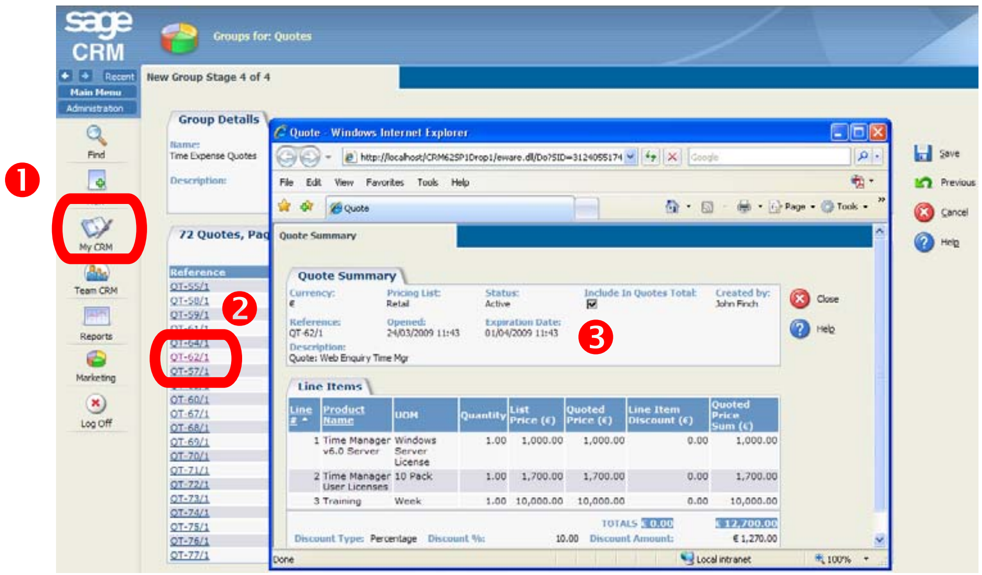
❸ Select the Convert button to convert the quote to an order.

❹ A message is displayed to the user.

Can I open quote or order details from a Group list?

Yes. You can open the quote or order summary by clicking on either the Reference link or the Description link of the quote or order.

To open the details of a quote from a group list:



❶ Select My CRM | Groups, and create a new group using based on the Quote entity.

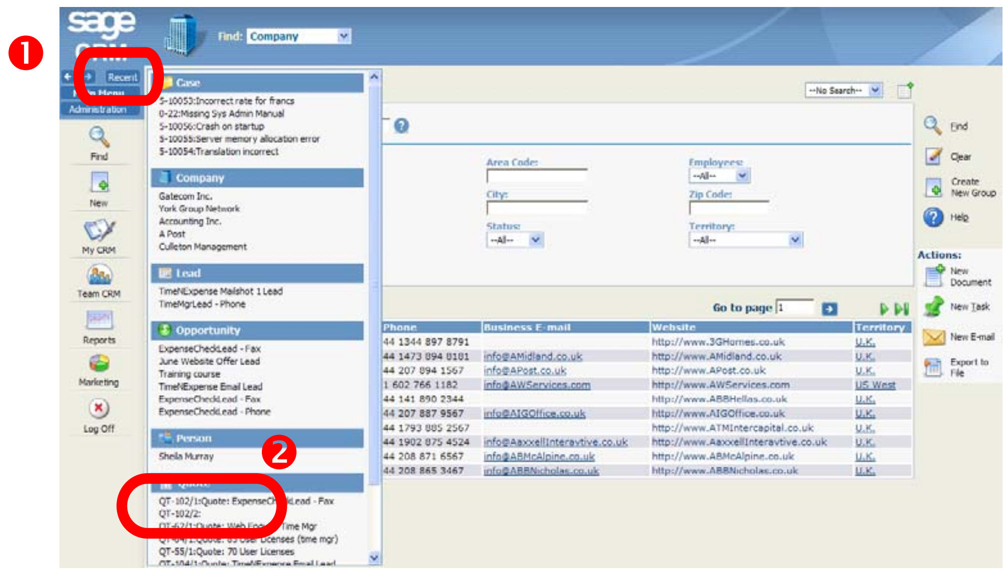
❷ Click on the Reference hyperlink of one of the quotes.

❸ The Quote Summary page is displayed in a new browser window.

Do quotes and orders appear in the Recent list?

Yes, as long as they have either a Reference or a Description associated with them. If a quote or order has neither, it cannot be accessed via the Recent list.

To access a quote from the Recent list:



❶ Select the Recent list button.

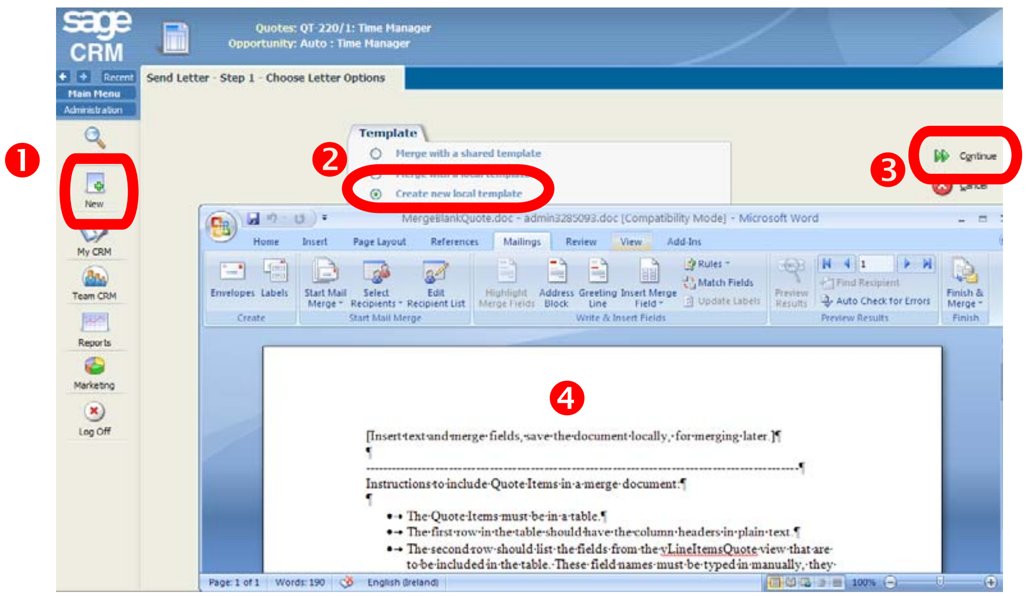
❷ Click on the Quote you want to jump to.

Note: Quotes and orders appear in the “web picker” in a similar format. For example, select New | Appointment, and select Quote in the Regarding field. The list returned shows the quote reference and description columns.

Can I create a new quote template during a quote merge?

Yes. The Create New Local Template option is available during the quote or order merge process.

To create a new template during a quote merge:



❶ Select New | Quote. Fill in the details, add your line items, then select Export To Word.

❷ Select Create New Local Template.

❸ Click Continue.

❹ The MergeBlankQuote.doc document is displayed. This can be edited, saved, and the merge completed.

Note: You may be prompted to download the new document plugin the first time you do this. Follow the on-screen instructions to complete the plugin download.

What else has changed in this area?

The following quote and order related cases have also been solved:

Case Ref ID	Description
281-33117	When the Administration | System Behavior setting Use Opportunity Items is set to Quotes And Orders (rather than Opportunity Items), the old-style (pre-5.7) products are no longer loaded at logon.
261-47196	When adding a new line item, the hyperlink to more details on the Product and Product Family has been removed for normal users. It can be accessed by a user with Administrator rights (or Info Manager with Products).
353-39474	Selecting the Main Menu New Document button part way through an Export To Word action in the context of a quote now displays the same Send Letter, Step 1 page as at the start of the action, which includes the Create New Local Template option.
261-45947	Clicking on the ERP Message icon in quote or order grid is now a hyperlink to the line item details.

Please refer to the 6.2 SP1 Release Notes for the full list of cases and known issues.

Chapter 3
Account Enhancements

The following new Account functionality is available in version 6.2 SP1:

- Send a mass e-mail to a group of accounts.
- Share an address between a company and an account.

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

Who can I log on as?

To work with the account enhancements you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

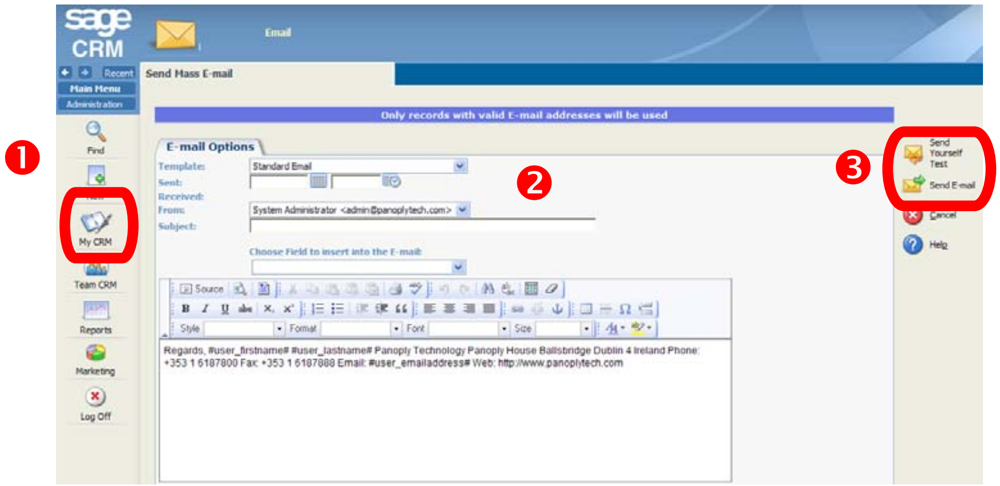
This user does not require a password. You can also log on as a non-admin user, e.g. Susan Maye, however you will first need to change her security profile to access Accounts.

Note: All features described in this chapter are for Integration systems only.

Can I send an e-mail to a group of accounts?

Yes. You can do this from My CRM | Groups or from the results of an account search (Find | Account).

To send an e-mail to a group of accounts:



❶ Select My CRM | Groups | New Group. Enter the details for the group, and select Save. Select the New E-mail button.

❷ Enter the e-mail details.

❸ Send yourself a test e-mail, then send.

The e-mails are handled according to the following rules:

– The Account e-mail address field is tried first.

– If this is not found or populated, the Account primary person e-mail address is tried.

– If this is not found or populated, the Company e-mail address is tried.

– If this is not found or populated, the Company primary person e-mail address is tried.

– If the account has no e-mail address and no associated company, it will not be sent.

– If an e-mail has been sent, the communication created against the account entity only (even if a different e-mail address is used).

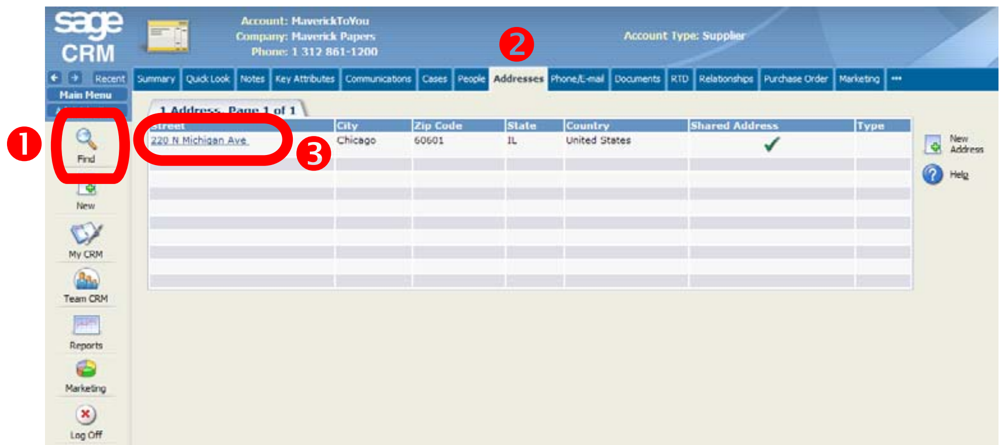
– If an e-mail has been sent, a communication is created against the User.

Can I update an account and a company address in one place?

Yes. An address can be shared between a company and an account, so that updates only have to be made once.

Note: The first time you add an account to a company, the main company address is automatically added to the Account Address panel. This address, or an alternative address selected or added here, will be shared by default between the account and company.

To update a shared address:



❶ Select Find | Account and search for the account you want to update the address for.

❷ Click on the Addresses tab within the account.

The check mark in the Shared Address column shows that the address is shared with the company.

❸ Click on the hyperlink of the shared address.

Make the updates and save.

The updated address can be viewed from the Addresses tab of the account, or the Addresses tab of the associated company.

Note: An address can be shared between a company and one account. If a company has multiple accounts (e.g. a customer account and a supplier account), which both reside at the same address, the second address must be maintained separately.

Please refer to the *Integration User and Administration Guide* for more details on this feature.

What else has changed in this area?

The following account related cases have also been solved:

Case Ref ID	Description
135-43582	Continue button on Account Summary screen behavior consistent with Case, Opportunity and Lead entities.
11-79580	An account document template and mail merge view are available.
11-79582	Sample JS files can be modified to include account fields.
11-79584	You can add key attribute data via the Key Attributes tab in the context of an account.
11-79583	There is a Marketing tab in the context of an account.
11-79581	The CRM details for Tasks and Appointments synchronized to Outlook includes Account information. Additional information sent at synchronization can be customized via Administration | Customization | Translation, using the Caption Family **OutlookServerSide**, and the Caption Codes: **OTL_AppointmentDetails** and **OTL_TaskDetails**.

Please refer to the 6.2 SP1 Release Notes for the full list of cases and known issues.

Chapter 4
More Features

In this chapter you will learn about:

- Enhanced error logging for Integration systems.
- Terminal Services evaluation project.

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

Who can I log on as?

To work with the integration error logging you can log on as:

Name	User Name	Profile
System Administrator	Admin	Administrator

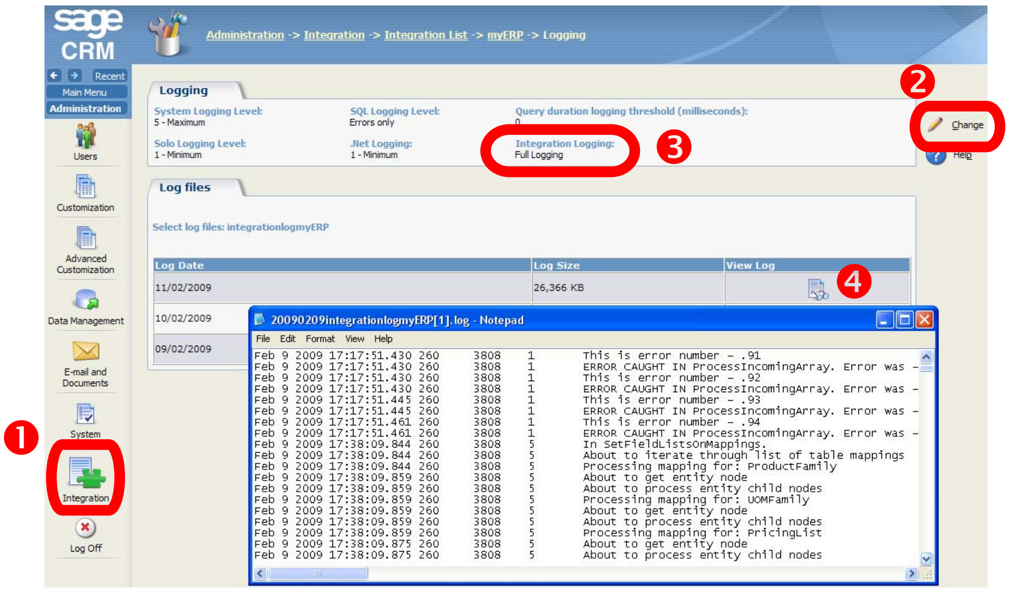
This user does not require a password.

Note: Integration error logging is for Integration systems only.

Can I set integration logging to show just the errors?

Yes.

To change the integration logging level:



1. Select Administration | Integration | Integration List and click on the hyperlink of the integration.

   Select View Log File.

2. Select the Change button.

3. Set the Integration Logging field to Errors Only, and save.

4. The log file can be viewed by clicking on the View Log icon.

   The Integration Logging field and log files can also be accessed via Administration | System | Logging.

   The log files reside in: .. \Program Files\Sage\CRM\[*installname*]\Logs. If there are multiple integrations, the log files are stored in separate subfolders within ..\Logs.

Is Sage CRM supported in a Terminal Services environment?

Yes. CRM is supported in a Terminal Services environment.

Terminal services is a feature of Windows which allows users to run applications on a remote Windows server. In the context of CRM, this means the users use Remote Desktop to log onto the CRM server, open IE on the CRM server, and use CRM from there.

Installing Outlook Integration

The following must be taken into consideration when installing Outlook Integration in a Terminal Services environment:

- Administrator rights are required on the Terminal Services machine to install the Outlook plugin, however these can be reset to non-administrator rights once the install has been completed.
- All instances of IE and Outlook must be closed to install the Outlook plugin. In a Terminal Services environment this means that exclusive access to the server is required for each user wishing to install Outlook Integration (at the time of the plugin installation).

Note: These considerations only apply when Outlook is on the Terminal Services machine. If Outlook is on the user’s local machine, then the standard CRM Outlook Integration installation procedure applies.

Module Support

The following modules are not fully supported and require further investigation:

- Solo
- Self Service
- CTI
- Exchange Synchronization