



# What's New in Sage CRM v6

The release of Sage CRM v6 centres around user experience, with particular emphasis on ease of use and simplified administration. This makes Sage CRM the most user-friendly CRM product available today. The all new Training and Coaching area provides step-by-step instructions on getting started and offers ongoing training to users as they work with the application day-by-day. We have further enhanced usability through simplified Field Level Security, code-free territory management and realignment, improved data segmentation and an even more powerful search engine.

Features	Benefits
<p><b>Training &amp; Coaching</b></p> <p>Sage CRM now offers exceptional on-screen support.</p> <p>We have added a new welcome tab, which is a great place for users to start – from here, you can access CRM system documentation, online training videos, system quick tips, the User Preferences wizard, and the System Administrator Quick Set-up Guide.</p> <p>Unique, new on-screen coaching functionality allows customised text to be displayed on each screen. This ensures that users know where they are in the system and what they are working on at all times. You can customise these tips depending on who is reading them and to match your business requirements.</p> <p>We have also added quick tips on recurring themes to educate users as they work with Sage CRM.</p>	<p>Enhances the user experience, makes Sage CRM more intuitive and user-friendly and results in more efficient users.</p> <p>Better training means that users are up to speed more quickly and the enhanced tips and continued support functionality increases user confidence.</p> <p>On-screen tips allow you to embed "best practice" within your business, perhaps using it to prompt users with questions to ask or to ensure that your business processes are made clear to the user.</p>
<p><b>Advanced Find</b></p> <p>Sage CRM v6 has also introduced new functionality around data searching. We have redesigned the entire Find interface within Sage CRM v6, to improve usability even further, allowing you to search within communications, to search by keywords across any part of the system and also to perform numeric searches.</p> <p>The new Advanced Find functionality also supports complex nested statements so "and/or" searches are now possible.</p>	<p>Makes information quick and easy to find, meaning users can 'work smarter' and be more productive.</p>
<p><b>Data Segmentation and Groups</b></p> <p>Sage CRM v6 brings New Data Segmentation functionality and a new Groups tab within My CRM. The Groups functionality allows users to organise records based on common characteristics; groups are sets of companies, people, opportunities, etc.</p> <p>Sage CRM can now hold two types of groups: static groups – which remain unchanged over time, regardless of any change in their circumstance, and dynamic groups – which change automatically when records are changed.</p>	<p>Even easier to perform actions such as mass emails, alerts, mail merges and mass record updates.</p> <p>Mass Updates allow users to update Group records in one easy step.</p> <p>Enables better data segmentation for use by Sales or Marketing in marketing campaigns.</p> <p>Individual records can be added to Groups so there is no need to continually rebuild them.</p>

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<p><b>Territory Management and Realignment</b></p> <p>Sage CRM v6 features improved, more flexible territory management features.</p> <p>The reorganisation of territories is a common aspect of organisational change. With this in mind, the changes to the territory administration area now mean that, it's easy to create, merge and move territories and the data associated with them.</p>	<p>Offers a simplified, code-free way to manage and realign territories. Makes the movement of data between 'owners' quick &amp; simple with no need for access to the database back-end and all the expert skills that can entail.</p>
<p><b>Simplified Field Level Security</b></p> <p>Sage CRM v6 has made Field Level Security even simpler to use by removing the requirement for code.</p> <p>Security on fields is now applied using checkboxes at the Field Level, rather than at the screen level, and can be applied to users, teams or profiles.</p> <p>Field Level Security applies security throughout the product including screens, lists, reports and so on.</p>	<p>Makes security administration much easier without compromising the system security.</p>

## About Sage CRM

Sage CRM is an easy-to-use, feature-rich Customer Relationship Management solution which is quick to deploy with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a web browser meaning Sage CRM takes advantage of the huge efficiencies that the Internet offers in delivering business applications.

## About Sage

Sage is a global provider of end-to-end business management applications for small to mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit [www.idlsystems.co.uk](http://www.idlsystems.co.uk) or contact us on 0870 70 2563

If you would like this information in an alternative format please contact Customer Care on 0870 770 2563 or email [sales@idlsystems.co.uk](mailto:sales@idlsystems.co.uk)



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