



SAGECRM NEWSLETTER

Introducing SageCRM Version 6.1

Sage Software has announced the release of SageCRM Version 6.1 which features enhanced integration with Microsoft Office, support for Microsoft Vista and Office 2007, and new customization capabilities that offer greater freedom to customize SageCRM to accommodate your unique way of doing business. Let's take a closer look at the new features in SageCRM v6.1.

Enhanced Integration with Outlook

SageCRM v6.1 introduces a tighter integration with Microsoft® Outlook® that's designed to increase productivity in both systems, from managing email to scheduling meetings. The improved Outlook integration includes the following components:

- **Outlook Plug-in** – A new wizard-driven plug-in simplifies installation and deployment.
- **File and View Email Button** – makes it easy to manage email messages and reply directly from within SageCRM. When multiple email messages are filed, the Communications tab of the person you emailed is displayed.
- **Conflict Resolution** – offers improved synchronization conflict handling when synchronizing between Outlook and CRM. A new CRM Synchronization Conflicts window displays all conflicting items and provides tools to easily filter and analyze conflicting fields to quickly resolve the issue.
- **Scheduling Improvements** – The meeting organizer is now displayed on the SageCRM meeting screen and multi-user appointment handling has been improved.

New Customization Capabilities

Version 6.1 provides new tools to further customize SageCRM to reflect your company's unique sales and business processes, making the system easier for all users. A new **Field Deletion Option** provides a code-free means to delete unwanted or unused fields directly through the user interface to free up space or "clean up" your screen. There is also new **Button Group Customization** feature that allows you to add new buttons to specific CRM screens that provide users with access to custom functionality. In addition, security can be added to new buttons that limits their access to certain groups of users. New buttons in the button group also take a user's existing security rights into account.

Quote and Order Enhancements

Your sales people will enjoy the enhanced quoting and ordering capabilities. New free text line items and comment lines allow users to add notes to quotes or orders. This makes it easy, for example, to add products to an order that are not in the price list. In addition, Quotes and Orders now behave like any other primary entity such as Company, Person, Opportunity or Lead. This means that you can now access Quotes and Orders from the Find button, carry out Keyword and Advanced searches, and assign notifications which makes finding and managing Quotes and Orders easier than ever.

Other Notables

The SageCRM Calendar day view has been redesigned to allow side-by-side display of overlapping appointments. This provides a cleaner and clearer display of information making it easier to use the SageCRM calendar interface. You can also change the appearance of the calendar Day View to a new Outlook-style view which organizes appointments and tasks in columns. SageCRM is now compatible with the Vista operating system and Microsoft Office 2007.

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[Contact Us](#) to discuss upgrade options or how **Version 6.1** can benefit your business.

Sell More by Controlling Your Calendar

A recent article written by [Geoffrey James](#) and posted on BNET Business Network (www.bnet.com) offers a simple technique for managing your sales calendar to maximize productivity and sell as much as possible. Let's take a look at this creative approach.

The Premise

According to the premise of the article, meetings with customers have a certain rhythm and, in general, take about the same amount of time. Therefore, if you're going to be productive and sell as much as possible, you want to be able to schedule as many meetings as you can in a single day. For example, if an initial meeting with a customer or prospect averages 3 hours, you'll want to schedule one in the morning and one in the afternoon. Pretty straight forward so far.

The Wrinkle

But what happens if an important customer or prospect is only available at 11 AM? It isn't likely that you'll fit another 3-hour meeting in later in the afternoon which automatically means you'll be half as productive that day. You've just lost control of your calendar.

The Answer: Bait and Switch?

Here's what you do to take back control. Agree to whatever is convenient for your customer and make the initial appointment at 11 AM. However make sure it's far enough in advance that you can call the prospect (or their Administrative Assistant) a day or two later and **have the meeting moved to a time that's more convenient for you.**

Once you've got your proverbial foot in the door, the specific details of your customer's calendar fall in the hands of their Administrative Assistant. It then becomes their job to juggle appointments and make everything fit. **According to the article, this works about 99% of the time!**

Calendar Management with SageCRM

SageCRM provides your sales team with a complete calendar solution that's integrated with Microsoft Outlook. The SageCRM calendar offers daily, weekly, and monthly views as

well as reminders and notification alerts that increase efficiency, punctuality, and convenience. In addition, newly-released Version 6.1 introduces a new feature that allows you to change the appearance of your SageCRM calendar to a new Outlook-style view. This makes it easier for users of both SageCRM and Outlook to easily switch between the two calendars.



[Contact Us](#) for More Information or to Discuss an Upgrade to SageCRM Version 6.1

Tips and Tricks:

4 Tips for Better Password Security

Whether it's a few PCs or hundreds on your network, there is one thing that can prevent your system from being compromised: a great password. Here are 4 tips to prevent unauthorized access to your system:

- 1. Go Long** - The longer a password is, the exponentially more difficult it is to crack. As a general rule, a minimum of 8 characters is ideal.
- 2. Mix It Up** - Incorporate both lower and upper-case letters as well as numbers and keyboard characters (i.e. #,\$) for maximum security.
- 3. Random Encounter** - Don't use anything in your password that's personal and easy to guess. That includes names of children, pets, birthdates, and phone numbers. Make it as random as possible.
- 4. Change is Good** - Make sure to change your passwords often to create a moving target for hackers. Changing passwords is recommended at least a few times per year.

Source: Microsoft Small Business Center

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