Net @ Work

Sage CRM 7.3
What's new guide

With a suite of new Business Accelerators for Sales, added business insight, a contemporary user experience, and an enhanced mobile and email marketing solution, Sage CRM 7.3 addresses the key business challenges faced by busy sales organisations every day.

Sage CRM 7.3 offers customers a host of exciting new features and enhancements as well as a contemporary user experience and intuitive design. The latest release provides everyone in your business with easy access to the information they need to close sales faster and make every customer interaction count, no matter where they are.

Business Accelerators for Sales are designed to help you accelerate sales performance and drive sales productivity using Sage CRM. They work by providing managers and sales people in your business with comprehensive sales-oriented data and insight, built-in alerts, sales workflows, dashboards, new sales performance charts and KPIs enabling better insight for actionable decision making.

Sage CRM 7.3 also offers customers more choice for their email marketing needs. Using the new Mailchimp integration, you can quickly and easily create new email marketing campaigns and gain valuable insight into how they're performing, such as how many people opened the email campaign and what they clicked.

The new contemporary, intuitive look and feel of Sage CRM 7.3 is designed to help you become more productive and access all the information you need quickly and easily.

And finally, the latest release includes great new enhancements to our mobile CRM offering. Customers will now benefit from a single mobile version of Sage CRM that can be used across all modern devices. And, we're also adding some great new features to our Sage CRM for iPhone sales app. We are also releasing our mobile sales app for Android* phones.

Sage CRM 7.3 at a glance

- New reports and dashboards enabling you to quickly create visual reports, for at-a-glance assessments, business insight and informed decision-making

- A range of preconfigured alerts and notifications to ensure management are getting real-time updates on their business KPIs

- New workflows so you can easily create business processes based on your unique company needs

- A fresh and contemporary design with new navigation delivers an enhanced user experience

- An optimised mobile experience ensures you and your team can perform key CRM tasks on a wider range of devices than ever before

- A new email marketing integration with MailChimp so you can easily send email marketing campaigns and track your results

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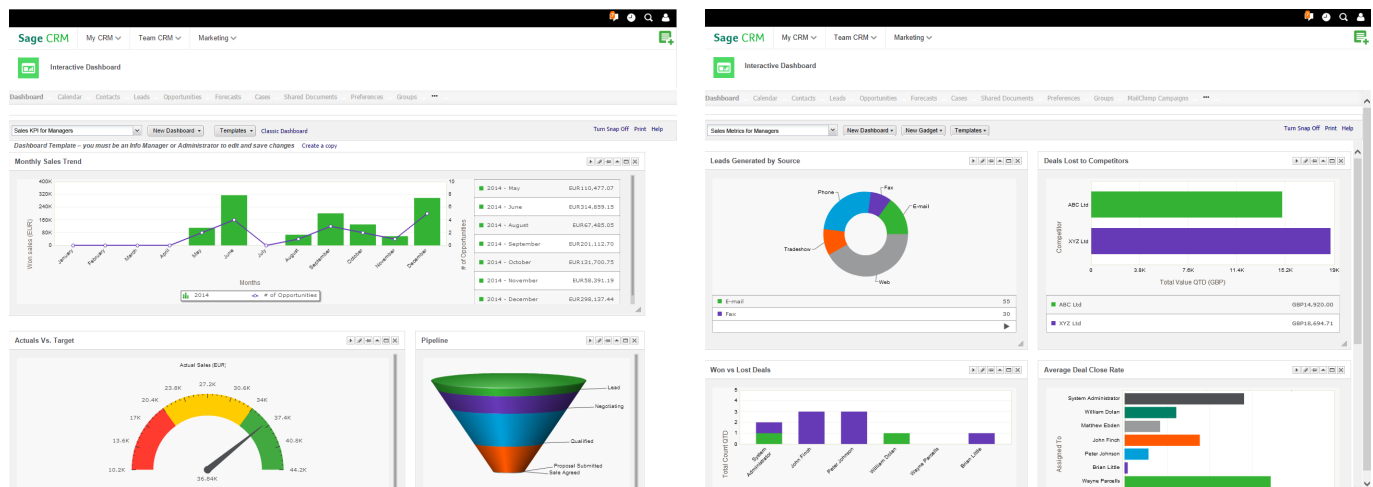
> Two new sales Dashboards will display important KPIs enabling you to easily unearth the hidden data in your business and leverage it for sales performance analysis and quick decision-making.

Business Accelerators for Sales

Business Accelerators for Sales offer a suite of new functionality to drive productivity right across your sales team by helping them to close sales faster, with the insight they need. Additionally, they enable management to make critical sales performance assessments and decisions rapidly. The new features included are:

- A range of preconfigured alerts and notifications to ensure managers are getting real time updates on their business KPIs as they happen

- A new alternative quick sale workflow to suit shorter sales processes

- Enhancements to the existing sales workflows in Sage CRM, including new rules for cross-selling opportunities and capturing details about deals lost

- New sales dashboards that display a range of new charts, reports and leaderboards for better insight and trend analysis

- New KPI charts to help you identify and measure your organisation's successful activities for greater sales performance analysis

A fresh, new contemporary look and feel

The new design of Sage CRM will help you become more productive and access all the information you need quickly and easily. It delivers a new interface with a cleaner navigation menu, a new icon set, new fonts and headers and new colours and styles.

An optimised mobile CRM experience

Our mobile CRM solution has been updated to include one optimised mobile experience for all modern devices. It enables you to access your key CRM data anywhere, anytime on any mobile device.

We're also adding some great new features and a brand new look and feel to our Sage CRM for iPhone sales app. Using this sales app you can access important customer data, even when out of coverage. No matter their location, sales professionals will always have quick and reliable mobile access to their Sage CRM data, tasks and appointments.

What's more we are also releasing our mobile sales app for Android* phones with Sage CRM 7.3.

Email marketing with MailChimp

Sage CRM 7.3 offers customers more choice to meet their email marketing needs with a new integration with MailChimp so you can easily create, send, and track email marketing campaigns. Using the new MailChimp integration, you will be able to quickly and easily create a new, targeted email campaigns by selecting from saved templates in MailChimp and the list you want to send it to.

Once you have sent your campaigns you can gain valuable insight into the results, such as how many people opened the email campaign and see exactly what they clicked. Best of all? MailChimp is free for lists of up to 2,000 subscribers.

*The Sage CRM for Android app will be available in Spring 2015

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