

WHAT'S NEW IN 7.3

- **New contemporary look and feel**
 - New top navigation includes all main navigation buttons which were in the left margin
 - Added line of intuitive buttons in the top right corner of the black bar

M MARTIN AND ASSOCIATES

WHAT'S NEW IN 7.3

M MARTIN AND ASSOCIATES

WHAT'S NEW IN 7.3

- **9 New Alerts**
 - Quarterly Quota Remaining
 - Daily Quota Remaining
 - Biweekly Pipeline Update
 - Opportunity Close Date Approaching
 - Unassigned Lead/Opportunity
 - High Value Opportunity Won
 - Quote Discount Value too large
 - Opportunity Reassigned
 - Lost Opportunities

M MARTIN AND ASSOCIATES

WHAT'S NEW IN 7.3

- **New Quick Sale workflow**
 - Recurring communication when On Hold to ensure the opportunity gets followed up on.

Actions:

Current State: Lead

- ▶ Sold
- ▶ On Hold
- ▶ Cancelled
- ▶ Lost

M MARTIN AND ASSOCIATES

WHAT'S NEW IN 7.3

- **Three new chart types**

Gauge

Combination
(bar with trend line)

Stacked bar

M MARTIN AND ASSOCIATES

WHAT'S NEW IN 7.3

- **MailChimp Integration**
 - With the Entrepreneur package, up to 2,000 subscribers and 12,000 emails per month free




- Push their Sage CRM contacts into MailChimp
- Quickly and easily create new targeted email marketing campaigns in Sage CRM
- Send the campaign and automatically add a communication record to the relevant records in Sage CRM
- View a list of sent MailChimp campaigns in Sage CRM and gain valuable insight into the results - opens, clicks, bounces and more
- Segment lists and create groups based on responses for future campaigns



WHAT'S NEW IN 7.3

- **New Mobile UI**
 - Unified customer experience across all smartphones and tablets
 - Uses the latest mobile web development framework




WHAT'S NEW IN 7.3




WHAT'S NEW IN 7.3

- **Other Customer Enhancements**
 - Lead deduplication
 - Match rules dedupe on an OR/AND basis
 - Currency symbol & decimal places on chart gadgets
 - CK Editor updated to the latest version, which has a full screen edit box



WHAT'S NEW IN 7.3

- **Coming Post-Release**
 - Upgraded iPhone app with a range of new enhancements for Sales users
 - Ability to display custom fields for people and opportunities
 - Add appointments and tasks
 - Add phone contact as a Person or Lead in Sage CRM
 - Improved calendar layout
 - Brand new Android app
 - Includes all the previous and new features available in the iPhone app

