The first release (R1) of Sage CRM 2020 is now available. Let's take a look at some of the top new features in this latest version.

MailChimp Integration Enhancements

The **Sage CRM MailChimp integration** has been enhanced to automatically detect duplicate email addresses, making it easier to prevent and fix these occurrences.

To ensure that a Person, Company, or Lead record being added to the system has a unique email address, system administrators can now use a new **Detect duplicate emails** option. Then, if a group sent to MailChimp contains two or more records with the same email address, the group gets rejected.

This enhancement includes the following:

- Automatic detection of duplicate email addresses
- A new screen displaying records with the same email address
- A new MailChimp notification

Managing Documents

The technology behind the Document Drop capability has been updated so the functionality is **now available in all browsers** that are supported by Sage CRM. Plus, you can drag-and-drop emails from Outlook in all web browsers.

In addition, you can now create document templates to perform a **nested mail merge**. This is where a parent entity record has the details of one or more child entity records embedded into it.

For example, you can create a template that generates an Order document with embedded Order Item records.

Outlook Plugins

Just like Document Drop, the technology framework for Lite and Classic Outlook plugins has been updated which means they now work in any web browser supported by Sage CRM. These Outlook plugins – or add-ons - for Sage CRM synchronize contacts, appointments, and tasks between the two applications. It also allows you to file single or multiple email messages in Outlook to one or more Sage CRM records so you have full documentation of all email communication between you and your customers. You can even attach Sage CRM shared documents to Outlook email.

Sage CRM v2019 Release Features

If you missed the enhancements for Sage CRM v2019, here's a summary of the features of that release:

Enhanced CRM Features

In the **Calendar** - which has significantly transformed and improved over the last several releases - you can now view a complete list of all your tasks and appointments in: **My CRM > Calendar List**.

Now when you access Sage CRM using Microsoft Internet Explorer, you can use the ActiveX **Document Drop** to attach documents to custom entity records.

When it comes to **Email**, you can now use the Outlook Plugin to file emails where the To and/or From field is empty. Previously, an error would occur if either of those fields were empty.

Quick Find has been optimized for a scenario where a system administrator adds more entities to the Quick Find index and they are immediately available in search results. Previous versions may have shown incomplete search results in this scenario.

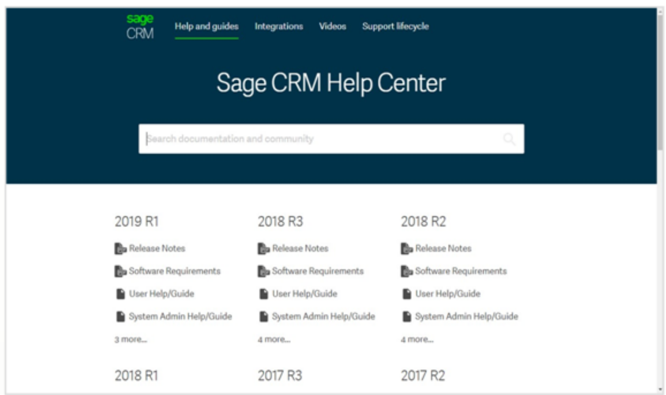
Based on feedback, improvements to Sage CRM Reports include **chart points** that have been made larger and are no longer connected by straight lines.

Lastly to enhance system **security**, new and amended user passwords will implement Bcrypt encryption technology which generates hashes and optimizes password strength.

Sage CRM Help Center

Getting you up and running quickly and answering product questions as they come up seem to be an intentional focus evidenced by the refreshed eLearning and updated User Assistance sections of Sage CRM. And as part of that goal, the Sage CRM Help Center at Help.SageCRM.com has been updated and provides easy access to:

Help and Guides - including release notes by version, user guides, administrator documents, helpful workbooks, and detailed software requirements specifications.



Integrations - documents and guidance for integrating Sage CRM with other applications.

Videos - deep-dive technical videos for things like Setting Up and Using Sage CRM Mobile, Installing the Classic Outlook Plugin, Setting Up New Users, and more.