

What's New in Sage CRM 2022 R2

August 2022

Sage CRM is trusted by hundreds of businesses from a variety of industries around the world. They use our customer relationship management solution to increase sales, generate more from marketing campaigns and build valuable customer relationships.



Gain reliable insight

Evaluate where your business stands, and make more informed business decisions you can be confident about.



Understand your customers better

Deliver an exceptional customer experience to improve customer retention and drive revenue growth.



Collaborate effectively

Avoid duplication of work, empowering your teams to work faster and smarter. With a single solution, everyone becomes more productive and efficient.



Accelerate team performance

With access to a wealth of information, your teams are equipped to work smarter and more efficiently, never missing important information.

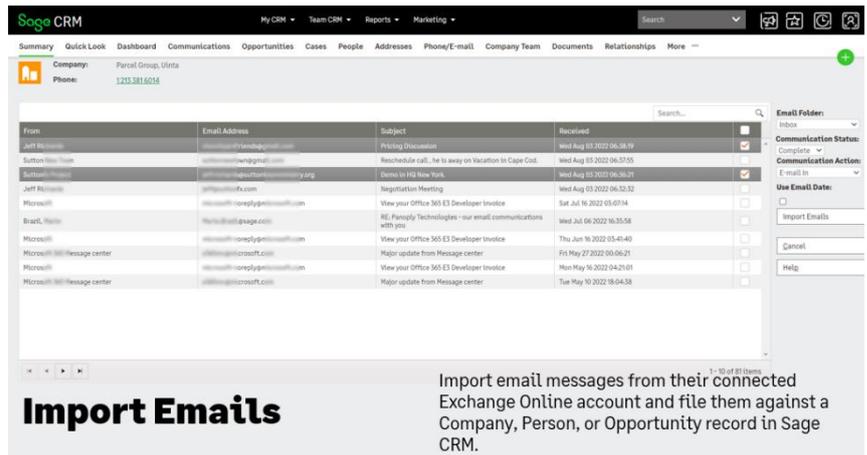
Simplifying & automating

The changes in Sage 2022 R2 have mainly focused on the new Email and Contact Import feature along with updates to the general user experience.

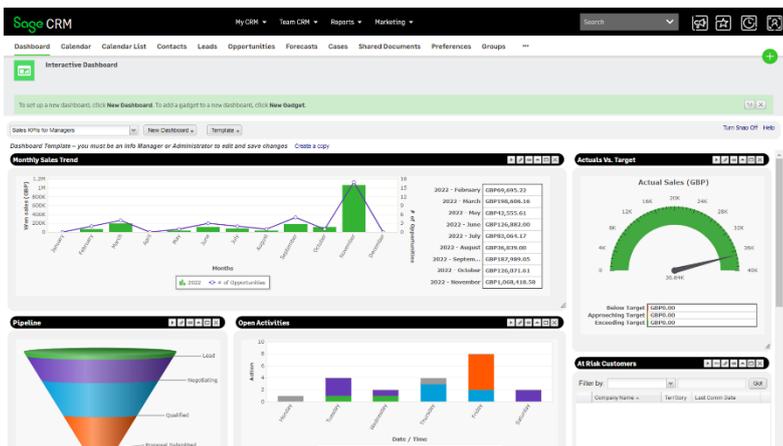
Updating old technology

A new Email and Contact Import feature that replaces the classic and lite Outlook plug-ins.

- Users can now import email messages from their Exchange Online account and file them against a Company, Person, or Opportunity record



The initial server connection will be for Exchange Online via OAuth 2.0. We aim to include support for Exchange On-Premise and Google Workspace from Sage CRM 2023 R1



Branding and UI uplift

Changes to the user interface that addresses accessibility include:

- Updated on-screen messages and imagery to improve readability
- Changes to menus, icons, and the overall colour palette

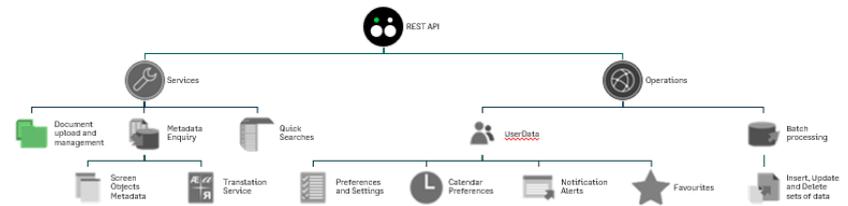
By leading with black within the Sage CRM interface we want to enable Sage green to 'pop' and provide the greatest amount of visual contrast to aid accessibility and simplify usage.

Enhancements to APIs

- The REST API has been extended to allow attachments to be placed into target folders

Sage CRM REST API 2022 R2

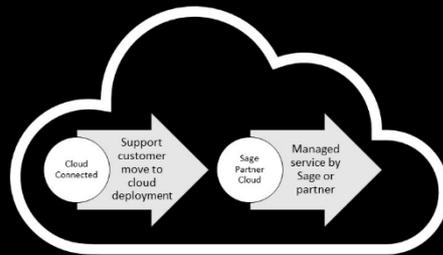
Extends the upload documents feature



This RESTful API enables developers and system administrators to create, read, update, and delete within Sage CRM using standard HTTP methods.

Executing deployment strategy at pace

- Deployable within Azure
- Deployable on Azure SQL
- Enable Management within Sage Partner Cloud



Support for SQL Server Web Edition

SQL Server Web edition is a low total-cost-of-ownership option.

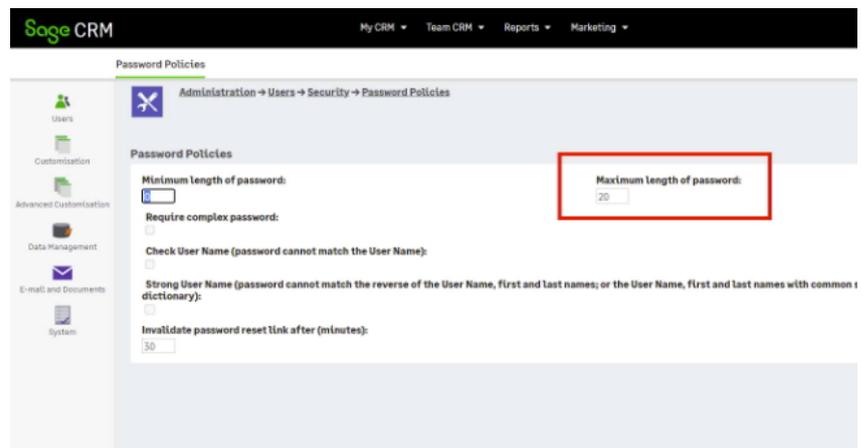
It provides scalability, affordability, and manageability capabilities for small to large-scale Web properties.

Sage CRM 2020 R1 added support for implementation on Amazon Elastic Compute Cloud (Amazon EC2). Sage CRM 2021 R1 added support for Microsoft Azure and Windows Datacenter.

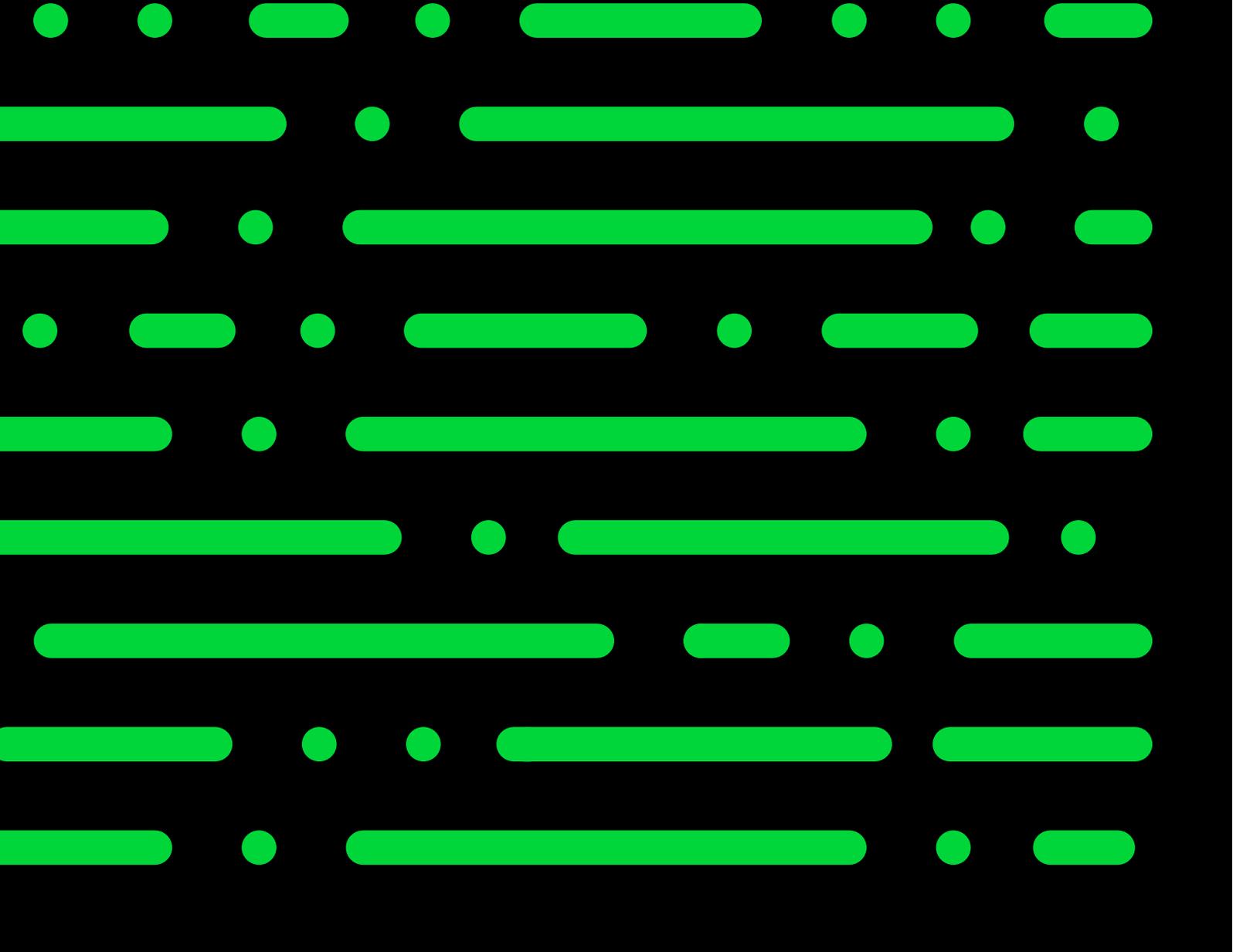
This new release, adding SQL Server Web edition to the list, extends our commitment to improve our customers' return-on-investment for their implementation.

Standardisation of password storage and encryption

- A new field in the screen allows password policies to be set for groups of users
- It enables system administrators to configure the maximum password length for the users the policy applies to



To further improve system security, we reviewed how passwords entered through the UI were stored within the system. The work standardized field sizes and the secure storage of the data.



How CRM can help your business deliver an exceptional customer experience

A CRM solution helps you simplify the business processes, shorten marketing, sales & service cycles, and make the most of every customer contact opportunity.

Using CRM software, marketing teams can identify the sources of leads, opportunities, and closed sales. The software can help sales teams automate tasks such as creating orders, forecasting sales, progressing leads, and never missing opportunities using workflow. Customer service teams can capture and manage information to deliver exceptional customer experience, improving customer retention and driving revenue growth.

To find more information

The 2022 R2 release has, like all previous versions, additional information available on the Sage CRM community. In particular, the Help Center (<http://help.sagecrm.com>) offers the latest release notes, guides, and interactive online help. This is the first place to look for help on the features & environmental information for all currently supported versions of Sage CRM.