

Datasheet

What's new guide
Sage CRM 2022 R1

Bringing together every area of a business including sales, marketing, service and finance.



The 2022 R1 release is designed to help your organisation make improvements to a customer's business, with numerous updates to user features, administrative tools and hosting & integration options. We are delighted with this release, ready to integrate with your Sage accounting system.

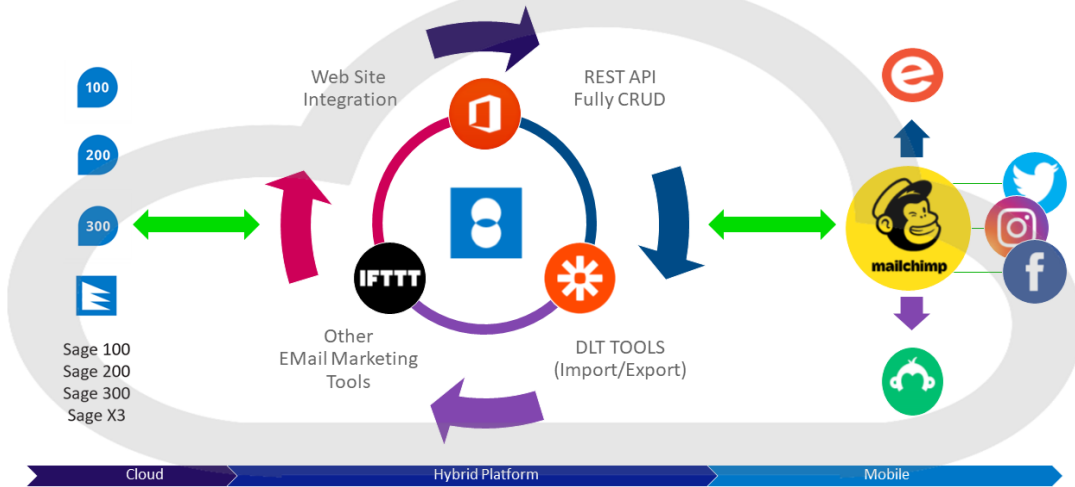
REST API improvements

Our previous RESTful API extensions added the ability to perform a search for a string across all company, people, case, opportunity, lead, solution, order, quote, communication, and custom entity records.

In this release, we have made a new parameter available for the Search entities using Quick Find endpoint. You can now narrow down your Quick Find search to a single entity.

Sage CRM REST API

Customer Centric Integration Capabilities

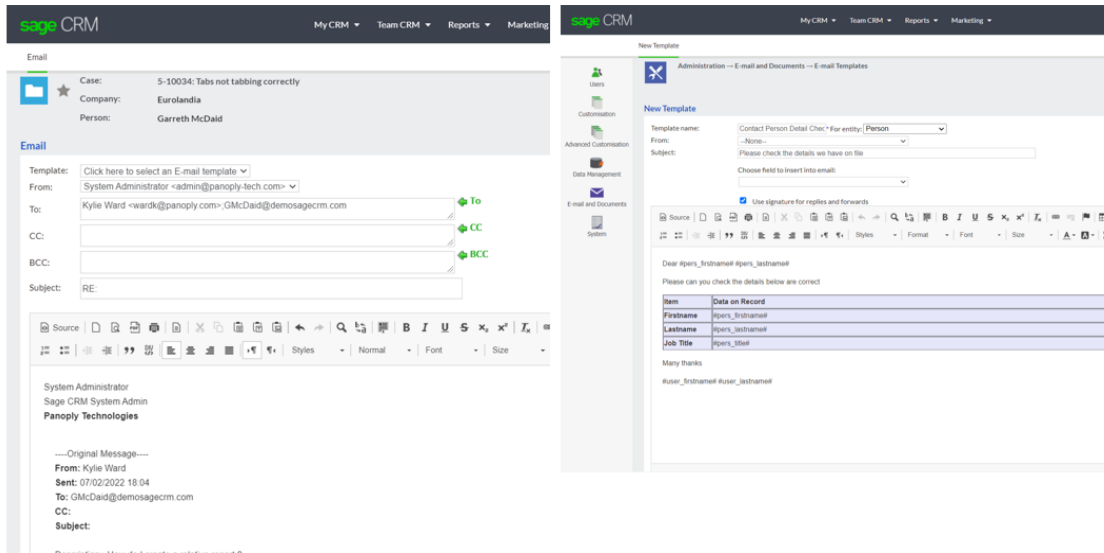


The new extensions offer more options & use cases for the REST API

Improving the user experience

We are helping to improve the user experience with a new function for handling emails. A new check box for replies and forwards offers users control over the information shared in emails.

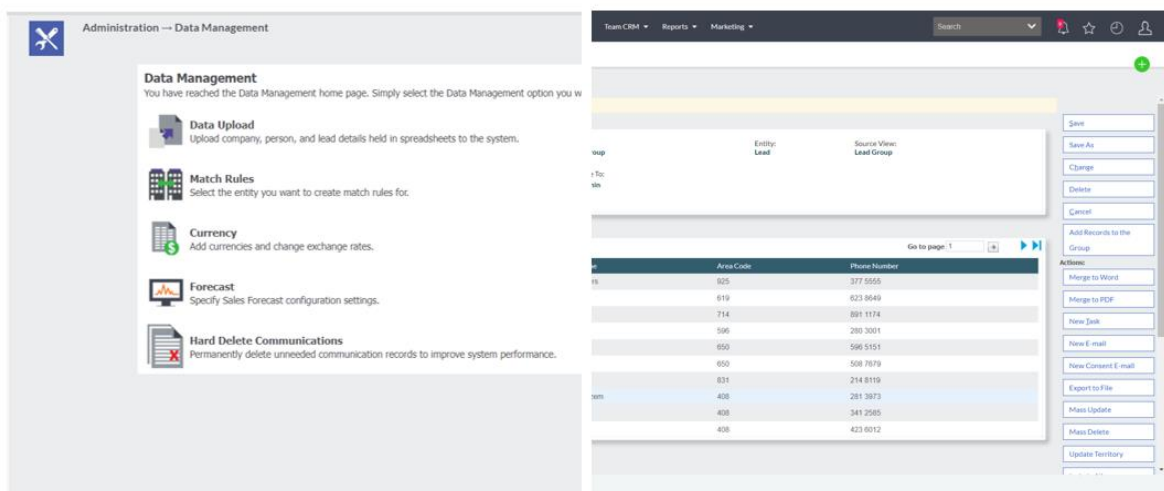
Users can now also layout documents in the way they want with resizable tables in both emails and HTML documents, improving the information layouts inside tabular formats.



Offering an even better return-on-investment story

Sage CRM 2022 R1 now offers mass delete of historic communications, helping administrators improve system performance and making sure the CRM system contains only the data users need. Further, the new update territory

feature operates on Leads, Cases, or Opportunities, allowing data to be updated and realigned as business needs change without resorting to writing cumbersome SQL statements.



The new 'mass delete' feature & territory update improvements.

Additional Sage CRM 2022 R1 Release Information

Extending data integrity rules

There are changes to records sharing the same email address to help ensure integrity – specifically around email addresses used to uniquely identify users for

Notifications. This is helpful when Sage CRM is integrated with 3rd party systems and email addresses are often used as the unique identifier.

Offering yet more deployment options

Sage CRM has a web-based architecture that gives customers the flexibility to install on-premises, within a private cloud implementation, on a public cloud offering or a hybrid implementation, supporting their journey to the cloud, at a pace that suits them and their business. Sage CRM can now be installed on Microsoft's Azure SQL database server,

extending our Azure story, and offering yet more hosting options for customers. Together with our modern REST API, this extends interoperability with other systems wherever & however they are deployed including the ability of Sage CRM to be deployed within the Sage Partner Cloud.

Other sources of information

The 2022 R1 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.

Upgrading to Sage CRM 2022 R1

The Sage CRM 2022 R1 installation package can be used to upgrade from versions 2021 R1, 2020 R2, 2020 R1, 2019 R1, 2019 R2 and 2019 R1. To upgrade from an earlier version of Sage CRM, you must upgrade

to one of the versions listed here first. Please check with your Sage Business Partner regarding the compatibility and availability of this release for your company.



Getting Help

- Help Center
- Knowledgebase



Learning Sage CRM

- Training
- Getting Started videos
- Support and training videos



Sage City

- Ask the Sage City Community
- Read the latest blog articles
- Help navigating Sage City



Resources

- [Documentation](#) - customers
- [SDK and Developer Tools](#) - partners