## What's New in Sage CRM 2023 R2

October 2023

Sage CRM is trusted by thousands of businesses, in 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.

r _	
	J
	1

#### Accelerate team performance.

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

# Improving the experience while driving down costs.

With enhancements to end user features plus extending integration and administrative capabilities, the Sage 2023 R2 release is all about reducing the cost of ownership of both software & system management.

#### Making the 'Company Narrative' tab multi-lingual.

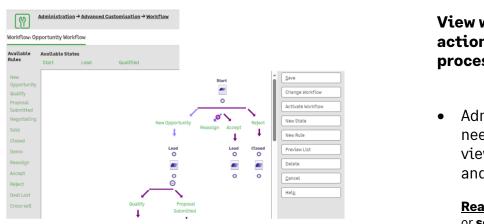
First released in 2023 R1, the narrative tab offers engaging insights than just data alone.

• Automatically analyzing data, the Narrative tab is now available in German, Spanish, and French.

**<u>Read more</u>** about this feature or <u>browse a selection of our</u> <u>videos on YouTube</u>.

Empresa:	Flyaway Almays 353.16618360	
Correo electrónic		validiensea avec m. com
2 minuto de tiempo de l	Sociétés Télépho	
Empresa	E-mail:	Info.AMidiandi/Somiademoragecrm.com
Flyaway Airways La cuenta princip		Firma: BKS Corrupted Telefon: 853 % 24522
trección	4 minutes de lecture	
Flyamay Airways Su enfoque com	A Midland & Sc Le compte prin	2 Minutejn Lasazeri
omunicación	Adresse	Firma
La última comun	A Midland & Sc Sa principale a	BKS Corrugated (Potenzieller Kunde) hat den Status Aktiv innerhalb des Gebiets Ireland. Das Hauptkonto wird von William Dolam ( <u>186 247 6593</u> ) verwaitet, die/der Tim McGraw ( <u>185 402 1498</u> ) untersteht ist.
lentas	Sa preicipale a	
No tenemos ning	Communication	Adresse
ncidencias	Il n'y a aucune	BKS Corrugated hat Niederlassungen in Rehins. Der Schwerpunkt der Geschäftstättigkeit ist Computer - Hardware, Der Hauptkontakt ist Patrick Graham (Chief Executive).
Fiyaway Airways	Ventes	Kommunikation
	Nous travaillon	Es liegen entweder keine abgeschlossenen Kommunikationsvorgänge vor oder Sie sind nicht zur Anzeige von Kommunikationsvorgängen berechtigt.
		Vertrieb
		Wir arbeiten derzeit an 1 NarrativeOpportunity mit einem potenziellen Wert von USD 53649.

Using deterministic AI, the narrative tab summarizes intelligence without having to look across records, converting data into information.



## View workflow rules and actions without stopping process automation.

 Administrators no longer need to disable a workflow to view the details of its rules and underlying actions.

**<u>Read more</u>** about this feature or <u>see our videos on</u> <u>YouTube</u>.

Requested by numerous implementers & administrators globally, we know this feature will introduce simplicity and reduce costs of ownership for our customers.

	Find:	an Maye 💙 🔿							
	<b>7</b> Opportunit								
	٩	2 ualified		3 Proposal Submitted		1 Negetiati	ng	1 Sale A	
	Statistics for All Stages								
		No. Oppos: 7			Forecast: GBP			-	ost: GBP 149,653.56
Find:	Av	erage Value: GBP 62,168	1.79		Average Certaŭ	ety::535/%		Weighted Av	erage: 0BP 33,304.71
My CRM for: Susan Maye V	Ð								
7 Opportunities									
0 0 Canceled Demo	<b>O</b> On Hold	0 Lead	<b>2</b> Qualified	<b>3</b> Proposal Submitted	1 Negotiating	1 Sale Agreed	0 Deal Lost	0 Sale Closed	
Statistics for All Stages									
No. Opp	<b>55</b> 17		Fore	ecast: GBP 435,181.54			Weighted Fe	ost: GBP 149,653.56	
Average Value: 0	SBP 62,168.79		Avera	ge Certainty: 53.57%			Weighted Ave	erage: GBP 33,304.71	

#### Enhancements to the Pipeline Reporting graphic.

- A new option controls the cases, leads and opportunities pipeline.
- Both users and administrators can now hide pipeline stages that have "zero information".

**<u>Read more</u>** about this feature or <u>see a range of videos on</u> <u>YouTube</u>.

This design helps focus users' attention on the data that matters and makes better use of the on-screen real estate.

#### Introducing the Multiple Read-only Tabs feature.

- This enables Company, Lead, or Opportunity records to be opened in multiple browser tabs.
- Users can now more easily view and understand related data all at once.

**<u>Read more</u>** about this feature or **see our videos on YouTube**.

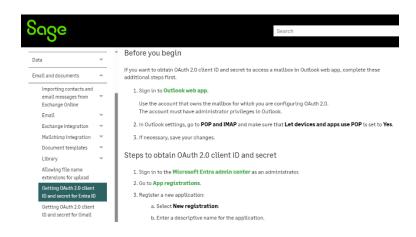
e c						- /	e 🕸			
	CRM - D	exhiberd X	Opportunity	х 🖬 Сотрат	y s	<   +				
Sage CRM										
Dashboard Calen	Sage CRM	9000	Dehboard x	Capaturity	x 🖪 Com	cary.	× +			
Interactive	Summary Quotes Orde									
	Opportunity:									
	Companya Personi	Sage CRM		My CRH + Team	CRM • Reports •	Narketing *		344	46	~
Sales Dairboard		Summary Quick Look	Narrative Dashboard 0	Communications P	ople Opportunities	Cases Addresses	Phone/E-mail	Company Team	Documents	Relation
ashboard Template - y	This screen shows the details of you want.	Company	Gatecon Inc.							
Ny Open Opportunit	For	Phone:	1204140-9677							
	Company	E-mails	infollution arrivation to the	of the details on This same	er, select the Change action	button on the right hand si	de at the screen. You	can change ione Cong	sany details from	De Satutery
Hy Open Opportunit Filter by		E-mails	lefe Distance and Statemak	of the details on This same	er, solact the Change action t get of company information.	button on the right-friend si	de af the screen. You	can change some Comp	sary dataits from	De Satritery
Hy Open Opportunit	Company	E-mails	infollution arrivation to the	of the details on This same	er, when the Charge action ge of company internation	button on the right-hand bi	de of the screen. You	can change some Comp	sary details from	De Satritary
Ny Open Opportunit	Cempany: Destan Nign Inc. 1012020 Details Description	E-mails Trials the Company Semen eith rock, but you need to p Company > Company Nerve:	infold anexample of the charge any any screen. If you want to charge any fact the Address, Prees, E-mail, or h Types:	of the details on This same	en, select the Change action 1 pe of company information. SLAc	button on the right hand is	Website		any details from	De Sarme'/
Riy Open Opportunt Filter by Status	Company: Design Hight inc. 10120220 Details Description 50 User plus consulting	E-mails This is the Company Summ etil mode, but you need to p Company >	Info.D. discussion of the barrays My acress. If you want to change any Next the Address. Prime, E-mail, or P	of the details on This same	ge of company information.	button on the right faced of	Website		any setails for	De Sarrary (
Hy Open Opportunt Filer by Status Status In Progress	Cempany: Destan Nign Inc. 1012020 Details Description	Company > Company > Company Summ Company > Company > Company Anne: Calabori No. Station Active	interful descentive of the charge are any across. If you want to charge are alert the Appress, Prone, E-moll, or P Prospect Segment Corruptions - Har	of the details on this scre Version tab to change this t	ge of company information. SLAc		Nebalite <u>http://ww</u>	enantecon.com	any details from	De Sarvre'y
Cy Open Opportunt Filer by Sotus In Progress In Progress In Progress	Company: Coulor Night Inc. 75(122.2) Details Description 50 User plus consulting Details	E-mails This is the Company Series estimates they are not Company > Company > Company Series States	interface and the charge any sectors appears. From, E-mail, or P Type: Prospect Segments	of the details on this scre Version tab to change this t	ge of company information.		Nebalite <u>http://ww</u>		sany defails from	De Sammery
Yore Opportunit  Fire by Status In Progress In Progress In Progress In Progress In Progress In Progress	Company: Destign High Inc. (5) 122224 Details Description So Uses plos consulting Details: This will be a long tell as the	Company Company Company Company Company Casedon in: Stateon Active Active Active	Infortune converte to charge any fact the Appendix Press, E-mail, of P Propert Propert Segments Computers - Nor Performance	of the details on this scre Version tab to change this t	ge of company information. SLA: Account Mi	inisger.	Makine Mail Res No	enantecon.com	saty details from	De Saterary
Yore Opportunit  Fire by Status In Propres	Company: Coulor Night Inc. 75(122.2) Details Description 50 User plus consulting Details	Company > Company > Company > Company > Company > Company > Categorian Active Active Active Active Active Active	Infortune converte to charge any fact the Appendix Press, E-mail, of P Propert Propert Segments Computers - Nor Performance	of the setable on this scre lense tab to change this t	ge of company information. SLA: Account Mi Brian Little	nager. Phone/E-ma	Mebalte Mail Res No	t wateron.com	outy details from	De Sermary
Ry Open Opportunt Filter by: Status Collision In Progress Di In Progress Di In Progress Di In Progress Di In Progress Di In Progress Di In Progress	Company: Owtop High Inc. 51122.20 Details Description So User price consisting Details: This will be a long sell as the Cross-sell Opportunity:	Company Company Company Company Company Casedon in: Stateon Active Active Active	Infortune converte to charge any fact the Appendix Press, E-mail, of P Propert Propert Segments Computers - Nor Performance	of the details on this scre Version tab to change this t	ge of company information. SLA: Account Mi	inisger.	Makine Mail Res No	t treatmon.com	any details from	the Sammary

Reducing the need to constantly move between CRM screens to view the information, this new feature enables users to work faster and more accurately.

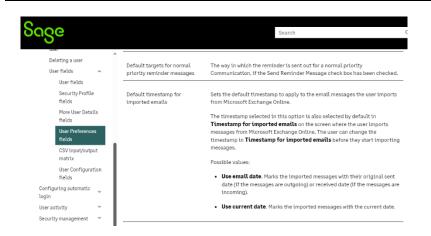
#### Changes in OAuth for Exchange Integration.

 Administrators can now specify whether their hosted CRM installation supports single or multiple tenancy.

> <u>Read more</u> about this feature or <u>see our videos on YouTube</u>.



This changes expands the flexibility for customers using hosted environments for their Sage CRM installation.



### Enriching data around captured emails.

- An option to timestamp imported emails is available.
- A new column indicates which emails have attachments.

**<u>Read more</u>** about this feature or **see our videos on YouTube**.

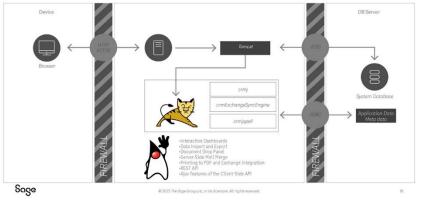
Extending the metadata available for emails helps improve the knowledge of users and ensures Sage CRM acts as the "central hub" of information inside every business.

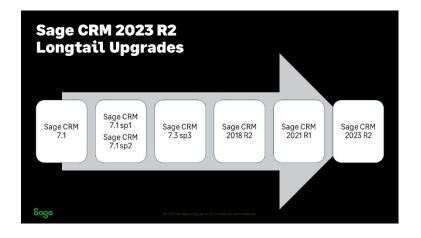
#### Replacement of Oracle Java Runtime Environment (JRE).

- We have replaced the current commercial version with an open-source JRE.
- All features are replaced "like for like", the version is free to use, and no upgrade work is required.

<u>Read more</u> about this feature or <u>see our videos on YouTube</u>.

#### Sage CRM Java Architecture





#### The importance of ensuring ongoing security updates.

- In every release, we deliver not only new features but important security updates.
- Total security for your Sage CRM installation depends on application, network, and database security.

You can **<u>read more</u>**, and watch videos, about the importance of security in <u>**a number of articles**</u>.

Many of our releases deliver important security updates. We want to make sure you stay as safe as possible. Please ensure you are using a <u>supported version</u> of Sage CRM in your business.



#### 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 Sage CRM software, marketing teams can identify the sources of leads, opportunities, and closed sales. Sales teams can use the software to automate tasks such as creating orders, forecasting sales, progressing leads, and more, using the in-built workflow tool. 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 2023 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.