

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.



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.

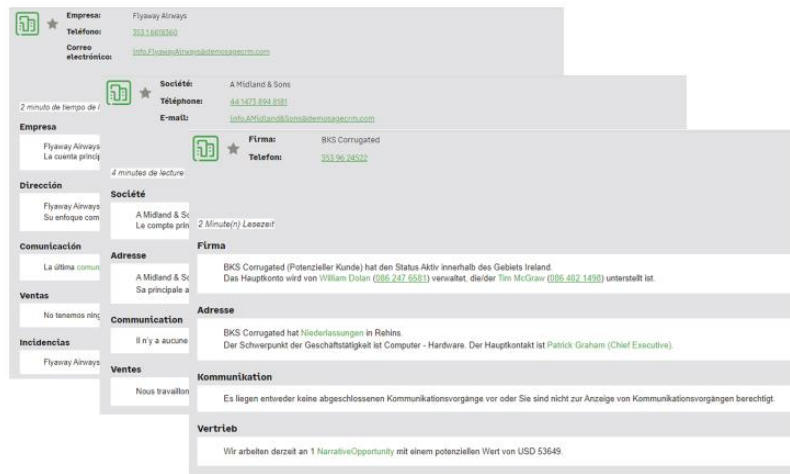
With enhancements to end user features plus extending integration and administrative capabilities, the Sage 2023 R2 release is all about reducing the cost of ownership of both software & system management.

Making the 'Company Narrative' tab multi-lingual.

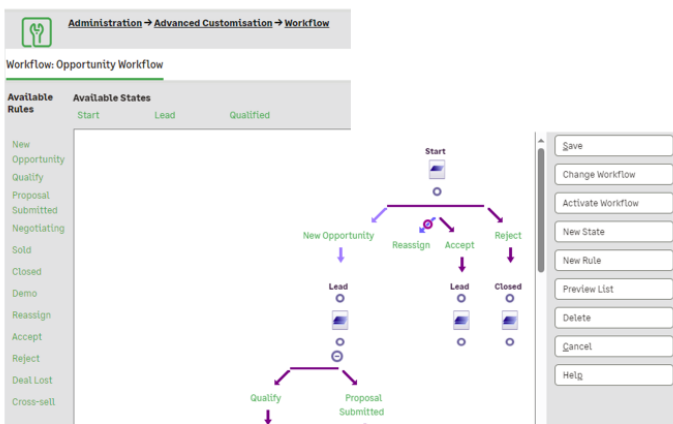
First released in 2023 R1, the narrative tab offers engaging insights than just data alone.

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

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



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

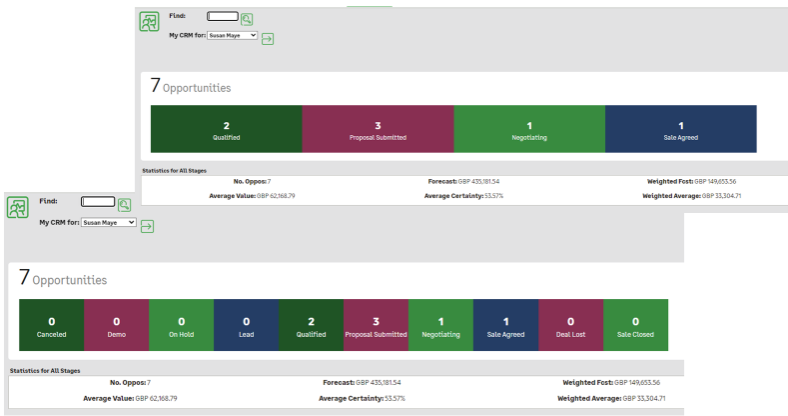


View workflow rules and actions without stopping process automation.

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

Read more about this feature or **see our videos on YouTube.**

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



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”.

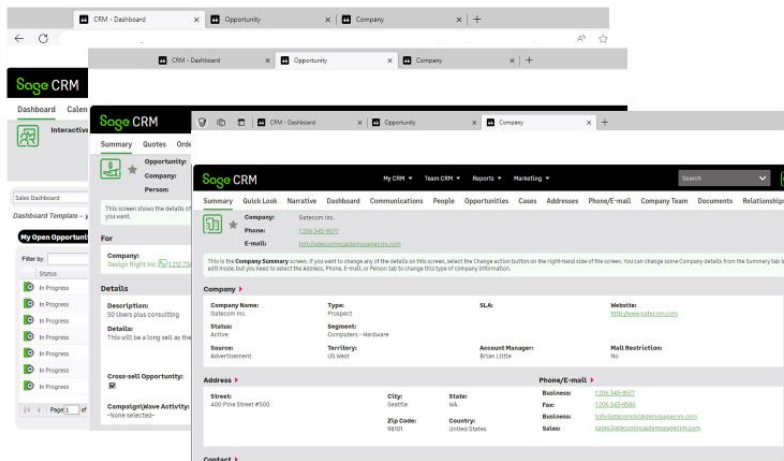
Read more about this feature or **see a range of videos on YouTube.**

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.

Read more about this feature or **see our videos on YouTube.**

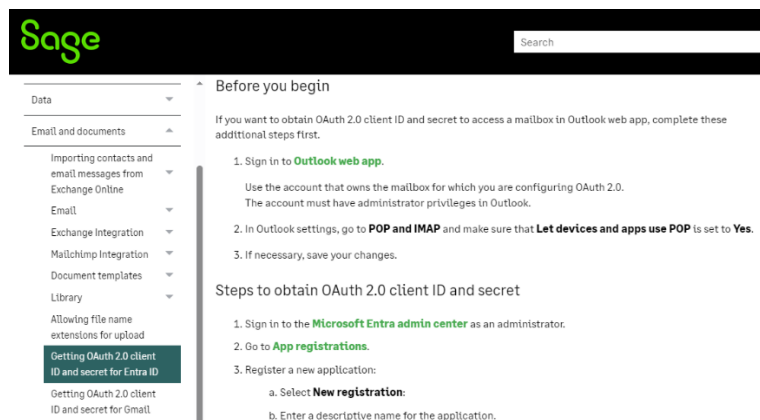


Reducing the need to constantly move between CRM screens to view the information, this new feature enables users to work faster and more accurately.

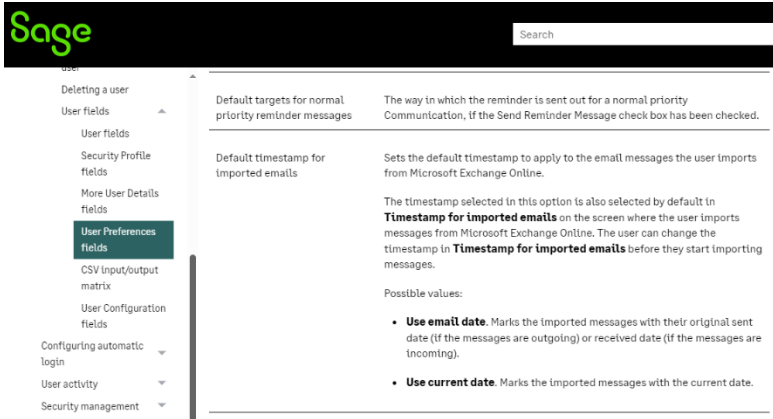
Changes in OAuth for Exchange Integration.

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

Read more about this feature or **see our videos on YouTube.**



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.

Read more about this feature or **see our videos on YouTube.**

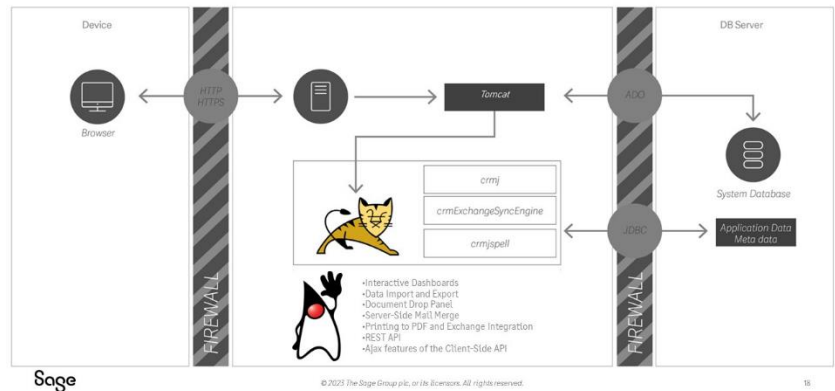
Extending the metadata available for emails helps improve the knowledge of users and ensures Sage CRM acts as the “central hub” of information inside every business.

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.

Read more about this feature or **see our videos on YouTube.**

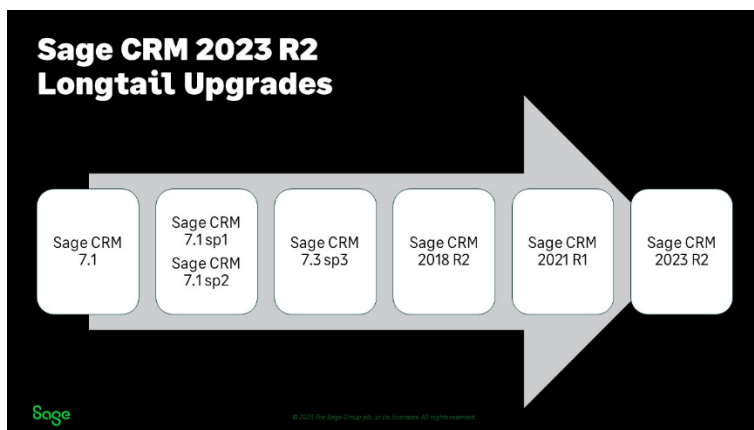
Sage CRM Java Architecture



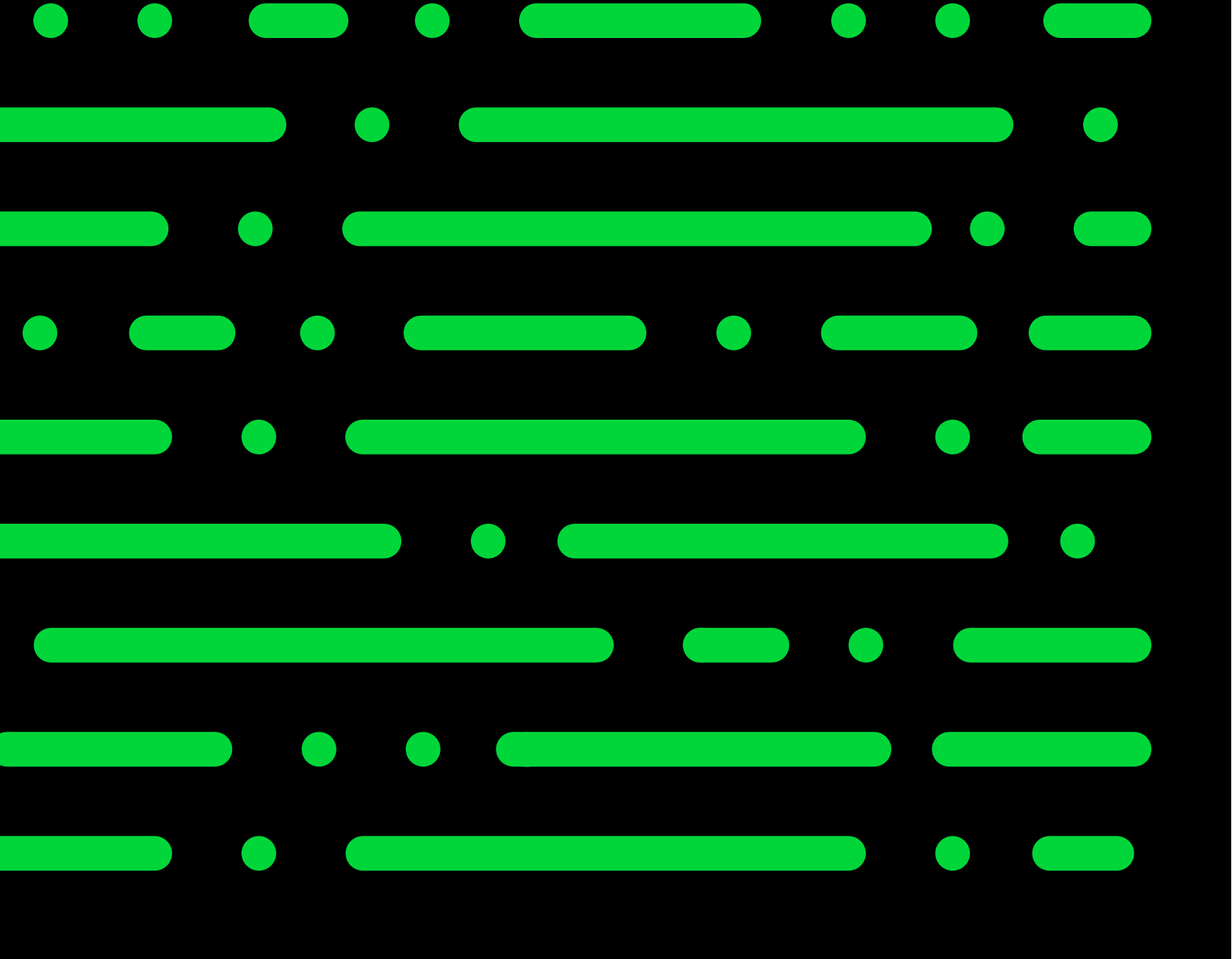
The importance of ensuring ongoing security updates.

- 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 **read more**, and watch videos, about the importance of security in **a number of articles.**



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 supported version 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.