

Datasheet

What's new guide Sage CRM 2021 R1

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



The 2021 R1 release of Sage CRM offers extra features to help manage customer relationships across the sales, marketing, and customer service areas of any business. This new release includes broadening of email authentication, improvements to editing capability and additions to the developer environment.

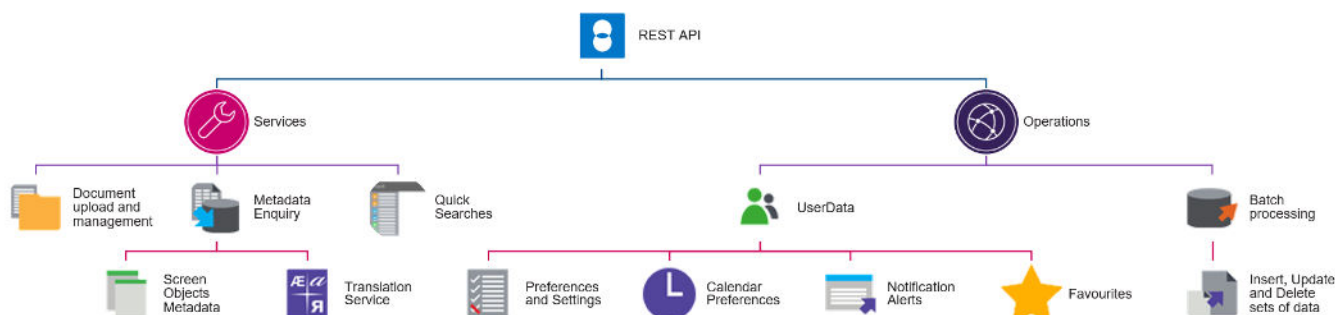
Extended RESTful endpoints

One of Sage CRM's key strengths is the ease with which it can be extended – screens, tables & more – improving the user experience and offering new business functionality.

While much of this extensibility can be achieved through simple configuration, where a behaviour requires programmatic coding, this can be done using a choice of different application programming

interfaces (APIs). The RESTful API has seen a significant expansion in this release with an added endpoint for the management of document upload.

We also have delivered schema discovery within the API - to enable finding of fields contained in screens and lists - as well as the attributes and the business rules associated with those fields.



Continuing the roadmap theme of extending the APIs for Sage CRM

This extension of functionality is useful in areas such as creating apps and portals. We have also added 'Quick Find' endpoints to allow for data searching across entities. We have exposed more user-based information including preferences and settings such as calendar information.

Further, we have published endpoints so that escalation notification messages and user favourite data can be shared from Sage CRM into custom applications. And, lastly, we have added the capability to perform batch operations via this interface.

Extension of Modern Authentication (OAuth 2.0) for Google and Office 365

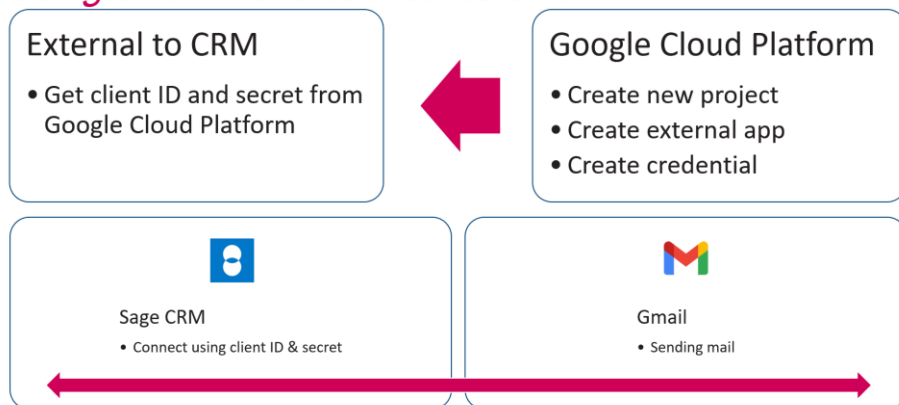
In Sage CRM 2020 R2 we anticipated Microsoft's retirement of Basic Authentication for IMAP & POP to access Exchange Online by adding in support for OAuth 2.0 – also known as 'Modern Authentication'.

In this release, we have deepened the capability to include both the internal email client and advanced email manager service being able to use OAuth 2.0 for both Microsoft and Gmail email systems.

Sage CRM 2021 R1

Using OAuth 2.0 to connect to Gmail

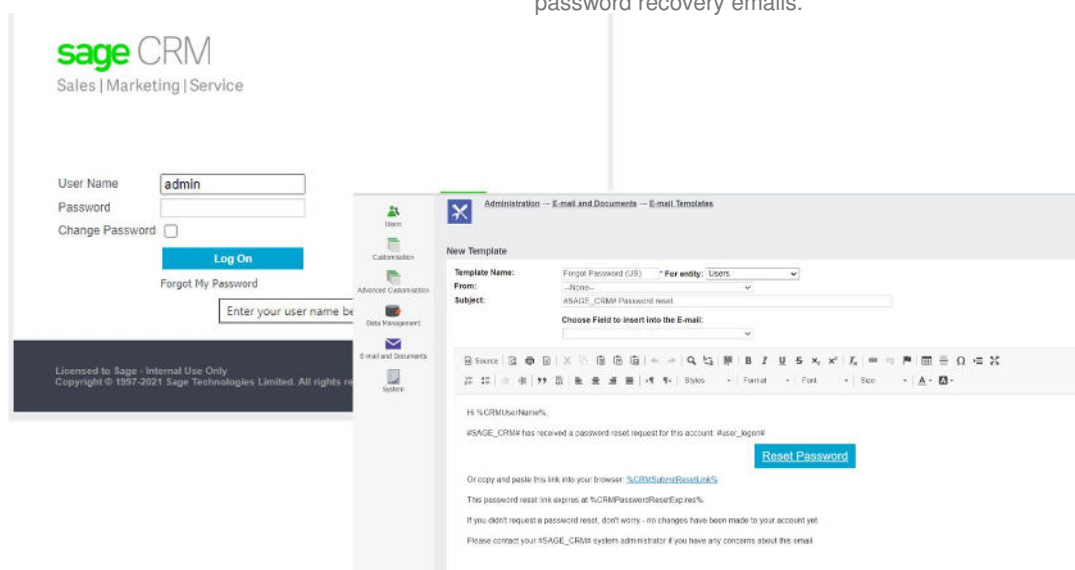
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Self-service password recovery

This feature, available on HTTPS-installed systems, enables users to reset their Sage CRM password without contacting the system administrator. Within a suitably set-up system, a user can receive an

email via a "Forgot My Password link" on the Sage CRM logon screen. The System Administrator can edit the default email templates used to send password recovery emails.



The new login & email reset features

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Additional Sage CRM 2021 R1 Release Information

Inline list & grid customization

Inline screen customization allows administrators to quickly view a screen before and after configuration changes. This feature has been extended in Sage CRM 2021 R1 to the 'list' and 'grid' objects to allow system

administrators to deliver new customizations for screens, lists and grids while remaining within the main user interface.

Telephone numbers as links

Simply clicking on a telephone link on a phone-capable device will now call a phone number. On a desktop computer when a telephone link is presented, you are normally prompted to select

an application - for example, Skype - in which a user will want to open the link. This new capability applies to custom fields and custom entities in addition to the default, core, entities.

Other sources of information

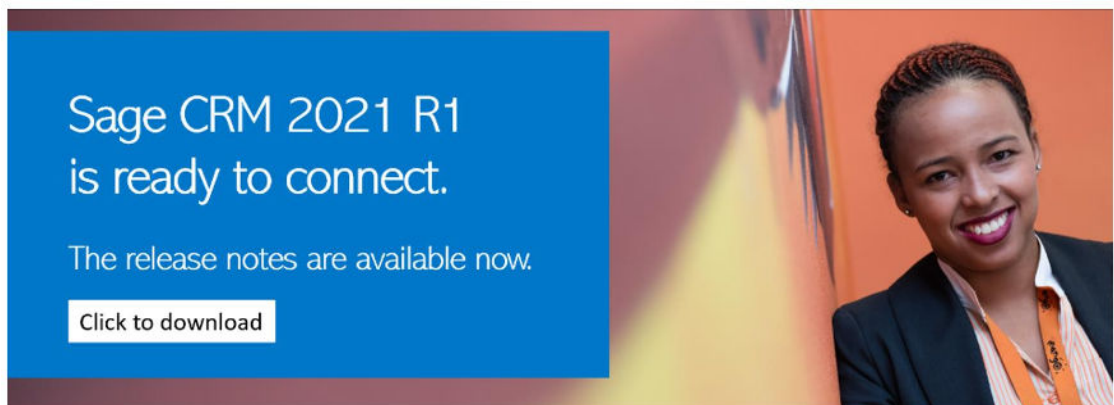
The 2021 R1 release has, like all previous releases, additional information available on the Sage CRM community. In particular, the Help Center (<http://help.sagecrm.com>) offers the

latest release notes, guides, and interactive online help. This is the first place to look for help around the features and supported environments for all supported versions of Sage CRM.

Upgrading to Sage CRM 2021 R1

The Sage CRM 2021 R1 installation package can be used to upgrade from versions 2020 R1, 2019 R1, 2019 R2, 2019 R1, 2018 R3 and 2018 R2. To upgrade from an earlier version of Sage CRM, you must upgrade to

one of the versions listed above first. Please check with your Sage Business Partner regarding the compatibility and availability of this release for your integrated system.



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