

DATASHEET

What's new guide Sage CRM 2019 R1

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

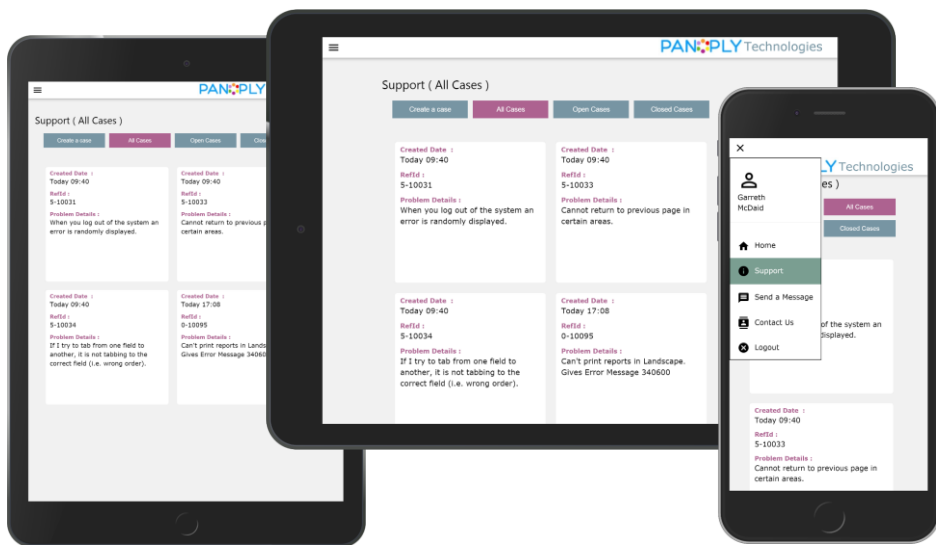


The 2019 R1 release of Sage CRM integrated to your Sage accounting solution offers extra features to help you manage your customer relationships across the sales, marketing and customer service areas of your business. This new release will help leverage CRM capability right across your organisation with updates to the self-service portal, the software development kit and numerous other improvements.

Improving the web self-service experience

We've provided a new responsive version of the Self-Service portal. It's easy to put into production and will allow our customers

and business partners to deliver on the power and adaptability of the Self-Service API for external users of Sage CRM.



The fully responsive web self-service portal in Sage CRM 2019 R1

Has Attachm...	Date / Time †	Type	Action	Person	Company Na...	Phone Full N...	Subject	Details	Status
	01/22/2019 4:20PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Follow Up on the New Quote	Follow Up on the New Quote	Pending
	01/23/2019 3:35PM	Tasks Only	Phone Out	Janette Mallet	Pole Position Inc.	1 206 624-6680	Phone and introduce myself as new account manager. Arrange meeting.	Phone and introduce myself as new account manager. Arrange meeting.	Pending
	01/24/2019 8:45PM	Tasks Only	Phone Out	Annette O'Toole	Maverick Papers	1 312 861-1200	Get the PO	Get the PO	Pending
	01/25/2019 4:40PM	Tasks Only	Phone Out	Jim Browne	Web Basics Limited	1 212 967-7400	Make initial contact and pitch product.	Make initial contact and pitch product.	Pending
	01/29/2019 1:00PM	Appointments Only	Meeting				Training	Product Training in Seattle	Pending
	01/29/2019 3:30PM	Tasks Only	Phone Out	Tony Smith	Harlob Controls Limited	1 212 725-5555	Contact Tony. Make sure he is satisfied. Give him feedback on planned releases and case resolutions.	Contact Tony. Make sure he is satisfied. Give him feedback on planned releases and case resolutions.	Pending
	01/30/2019 2:00PM	Appointments Only	Meeting	Kieran O'Toole	Eurolandia	1 617 227-1340	Meeting to discuss Eurolandia requirements. Purpose: get final list.	Meeting to discuss Eurolandia requirements. Purpose: get final list.	Pending
	02/04/2019 1:00PM	Appointments Only	Vacation				Vacation	Vacation	Pending
	02/05/2019 1:25PM	Tasks Only	Phone Out	Arthur Browne	Design Right Inc.	1 212 736-4440	Follow Up with Arthur when he returns from vacation to see what he thought of the	Follow Up with Arthur when he returns from vacation to see what he thought of the	Pending

Improvements to the Calendar List

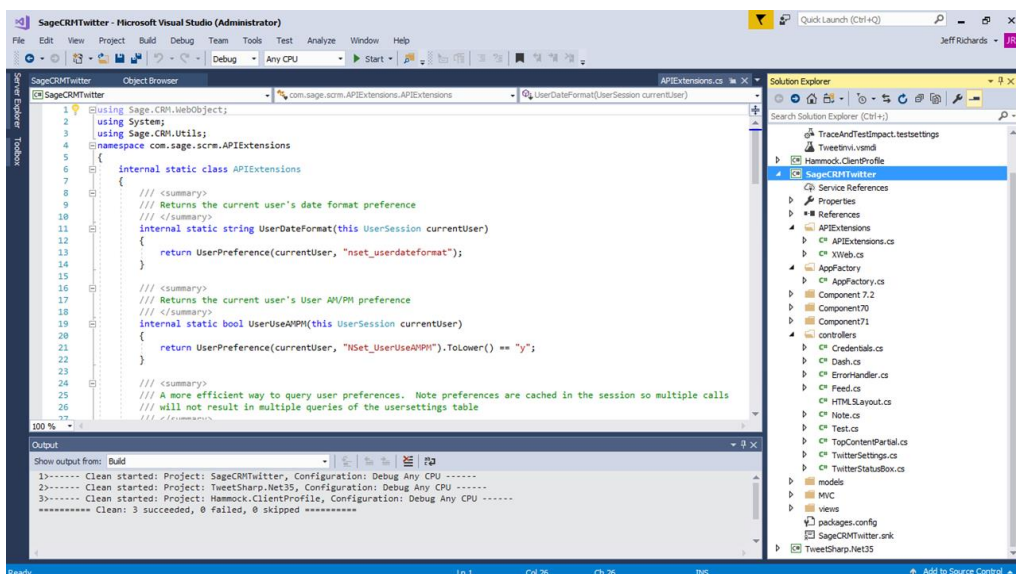
Each Sage CRM user can now view a complete list of their tasks and appointments in My CRM | Calendar List. By default, the list shows all tasks

and appointments from the moment when the user was created in Sage CRM.

Adding to the software development kit

We've made available - for educational purposes – numerous sample Visual Studio projects, including social media integrations. This allows our customers and business partners to speed up the creation of

these specific extensions, as well as developing custom integrations for specific customer projects and to extend core product functionality.



A sample developer component available with Sage CRM 2019 R1

Additional Sage CRM 2019 R1 Release Information

Other addressed issues

There are over 70 issues identified by customers that have been addressed in this release, covering everything from improved page loading speed, password security, filing of emails from Outlook

and more. Be sure to check the Release Notes that issue with the release and are also available at <http://help.sagecrm.com>

Upgrading to Sage CRM 2019 R1

You can use the Sage CRM 2019 R1 installation package to upgrade from versions 2018 R3, R2, R1 and 2017 R3, R2, R1 as well as 7.3 sp3. To upgrade from an earlier version of Sage CRM, you must upgrade to one of the versions listed above.

If you use Sage CRM integrated to a Sage accounting solution, please check with your Sage authorised Business Partner regarding the compatibility and availability of this release for your integrated system.

Maximising your Sage CRM investment

The Sage CRM product is supported by a wealth of training and education resources on the internet. The Sage CRM YouTube channel is an invaluable learning aid, designed to help reduce the amount of time for

customers and our business partners to understand and put into use various product features. Sixty one new videos have been added to the Sage CRM playlist in support of the most recent two releases.

The screenshot shows the Sage CRM YouTube channel page. The main video player displays a video titled "Sage CRM - Support and Training" with 147 videos, 4,732 views, and last updated on Nov 25, 2018. The channel is subscribed to by 6.2K users. A list of related videos is shown on the right, including:

- 1. Sage CRM: Field Mapping - Leads and Opportunities (2:38)
- 2. Sage CRM: Field Mapping - Leads and Company Data (3:12)
- 3. Sage CRM: Field Level Scripting Create Script in a List (3:18)
- 4. Sage CRM: List Customization (2:51)
- 5. Sage CRM: Field Level Scripting - Create Script in a Screen (5:26)
- 6. Sage CRM: Field Level Scripting - onChange Script (2:18)
- 7. Sage CRM: Field Level Scripting - Validate Script (2:55)