

DATASHEET

# What's new guide Sage CRM 2019 R2

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

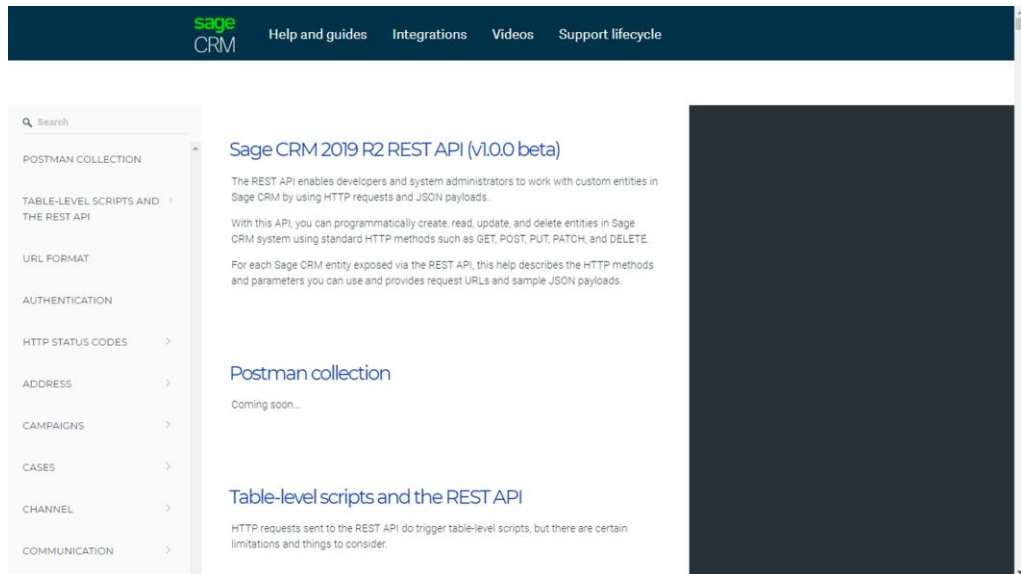


The 2019 R2 release of Sage CRM integrated to your Sage accounting solution offers extra features to help you manage your customer relationships across the sales, marketing and customer service areas of your business. This new release will help leverage CRM capability right across your organisation with updates to support Office 2019, mobile service enhancements, security on documents and a modern RESTful API.

### The addition of the new REST API

For Developers and anyone working to integrate Sage CRM with other web-based systems

The new API exposes the main entities – sales, marketing & service -within CRM.



The Sage CRM Help Center with RESTful API methods & code samples

## Taking full advantage of the RESTful API

This release makes available the main entities used to describe the core Sales, Marketing and Service features of Sage CRM.

Every entity is full documented with examples for inserting updating and deleting records

## New Help and User Assistance content

The User guide and online help have been updated to include:

- The new user experience of the updated responsive default Self Service demo site.
- The changes in Mobile experience for Service users.

While the System Administration Guide has also been updated to include:

- Self-service sample site & code pages.
- User security for library & document records
- eMarketing changes for 3<sup>rd</sup> party products

## Sage CRM 2019 R2

### *New Help and User Assistance content*



#### What's new in the User Guide and Help

- Revised Self Service section
- Changes in Mobile experience for Service users.

#### What's new in the Administrator Guide and Help

- Revised Self Service section
- Revised to cover administration of user security for Library and Document records
- Changes to E-Marketing references to take into account changes in support of 3<sup>rd</sup> party products

#### Localisation

Descriptions of all new features, enhancements, and addressed issues in Sage CRM 2019 R2 can be found in the *Release Notes* (will be published on the [Sage CRM Help Center](#) and provided with the setup package in English, German, French, and Spanish).

- **NOTE:** Translated help and guides have been discontinued. Only English documentation is now supplied with Sage CRM.

*A summary of changes within product and supporting environments*

## Additional Sage CRM 2019 R2 Release Information

### Other addressed issues

There are over 30 issues identified by customers that have been addressed in this release, covering everything from this thing, that thing, this other thing and one other thing that is very useful

and some more too. 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 R2

You can use the Sage CRM 2019 R2 installation package to upgrade from versions 2019 R1, 2018 R3, 2018 R2, 2018 R1, 2017 R3, 2017 R2, 2017 R1. 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

Thirty-five new videos have been added to the Sage CRM playlist since February 2019 when Sage CRM 2019 R1 was released – that's 586 minutes or just under 10 hours of training information.

The screenshot shows the YouTube channel page for 'Sage CRM - Support and Training'. The channel has 181 videos, 5,996 views, and was updated 5 days ago. It has 7.4K subscribers. The main video featured is 'Configuration and Set Up of Web Services' with a 'PLAY ALL' button. A list of 7 videos is shown on the right:

- 1 Sage CRM: Using the SOAP Web Services (54:16)
- 2 Sage CRM: Moving Customizations using the Component Manager (46:33)
- 3 Sage CRM: An introduction to ASP Pages (48:40)
- 4 Sage CRM: Building screens using the ASP API (Part 1) (52:14)
- 5 Sage CRM: Defining Escalation Rules (29:20)
- 6 Sage CRM: Other uses for Validate Rules (3:37)
- 7 Sage CRM: Complex Cross Entity Validate Rules (6:30)