Datasheet

What's new guide Sage CRM 2021 R2

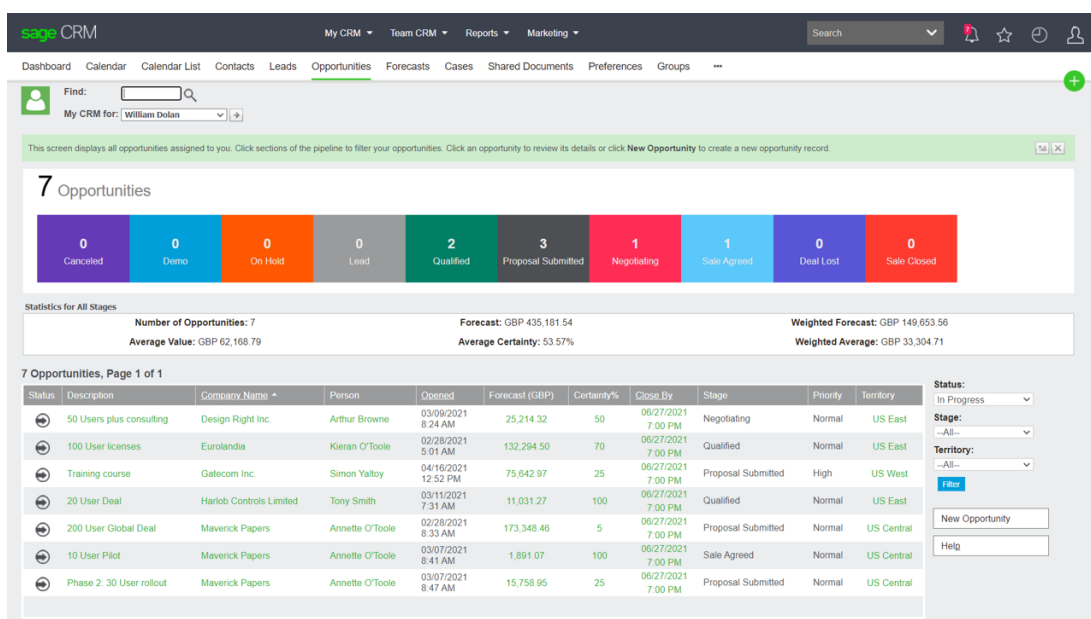*Bringing together every area of a business including sales, marketing, service and finance.*

The 2021 R2 release is designed to help your organisation make improvements to the user's experience, with changes to sales functionality, updates to screens & reporting and enhanced systems management. We are delighted with this release, ready to integrate with your Sage accounting system.

Updated dashboard design

Reporting pipelines have been updated to a modern, fresh design with fully customizable colors & styles. The new rectangular style appears in pipelines that display on the Opportunity List and Case List screens, located within the 'My CRM', 'Company' and 'Person' contexts. In addition, a new Quotes dashboard template has been added and can be assigned by user profile.
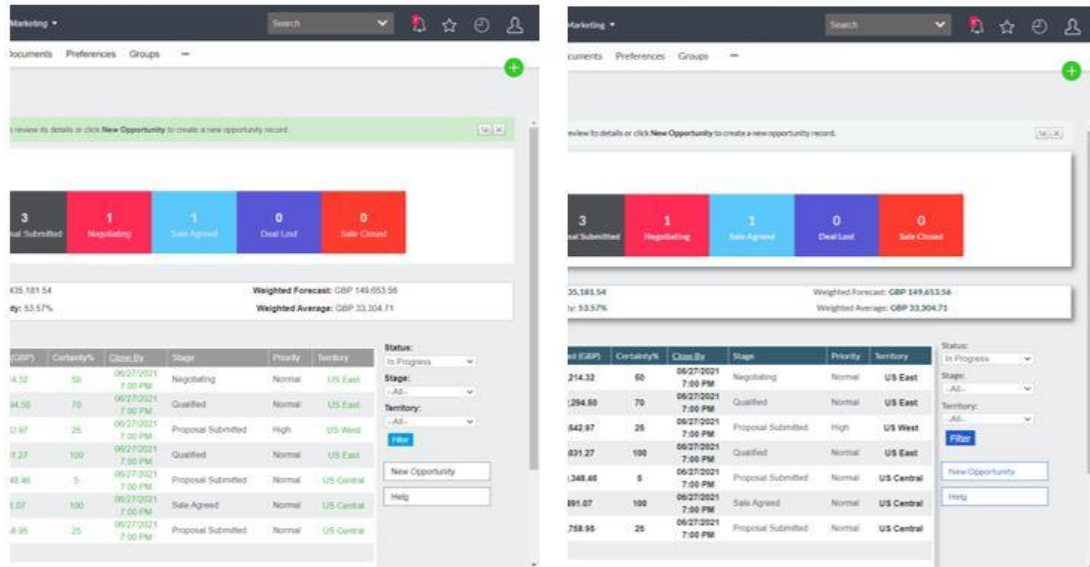

Sage CRM will continue to enhance the user experience in future releases.

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Interface improvements - Screens and Lists

For Sage CRM 2021 R2 a review of default screens and lists aimed to simplify and "de-clutter" the interface. On some screens, certain fields have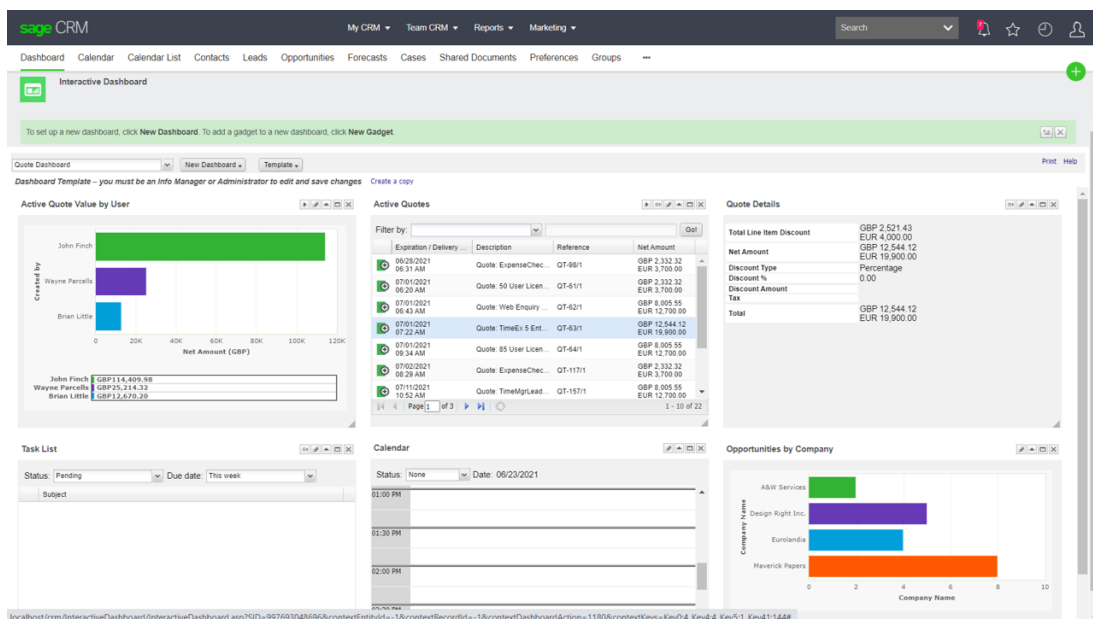 been removed from display while in other areas additional columns have been included. The aim is to allow better use of the screen real estate and display key information more appropriately.

New Views, Reports and Dashboard for Quotes

A new 'Quotes Dashboard' template has been added to Sage CRM 2021 R2. The new dashboard template displays a mix of gadget types, calling information from the Quotes table. Data is drawn from a new List report with quote details displayed in the Quotes Detail gadget.

The new dashboard template calling information from the Quotes table

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Configuration of Quote/Order names

The Product Configuration screen in Sage CRM 2021 R2 has been updated. Customers had reported that they didn't like the naming pattern that 2021 R1 and earlier releases had used for merged files. We now give customers the option to follow the Quote/Order ID format when creating quotes.

Improved Screen Loading

A new "wait cursor" or "spinner" has been added to the Sage CRM 2021 R2 interface. This spinner indicates when the system is working on tasks. The spinner indicates when Sage CRM is busy and a user needs to wait for the tasks to finish. The spinner will appear when Sage CRM loads a page, processes data or is busy saving changes. This and future changes are all designed to enhance the User Interface within Sage CRM.

Other sources of information

The 2021 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.

Upgrading to Sage CRM 2021 R2

The Sage CRM 2021 R2 installation package can be used to upgrade from versions 2021 R1, 2020 R2, 2020 R1, 2019 R1, 2019 R2, 2019 R1 and 2018 R3. To upgrade from an earlier version of Sage CRM, you must upgrade to one of the versions listed here first. Please check with your Sage Business Partner regarding the compatibility and availability of this release for your company.

Getting Help
- Help Center
- Knowledgebase

Learning Sage CRM
- Training
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