What's New in Sage CRM 2024 R1

April 2024

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.

A foundation for the future

Sage CRM 2024 R1 continues the work to modernize & improve the user experience, while also enhancing security, increasing productivity, and laying the groundwork for future advancements.

A new way of tracking and managing information.

Tags can be added to records to help classify your CRM data.

- You can create groups or reports that includes records with the same tag.

- Tags are available on case, company, lead, quote, order, opportunity, person & solution records.
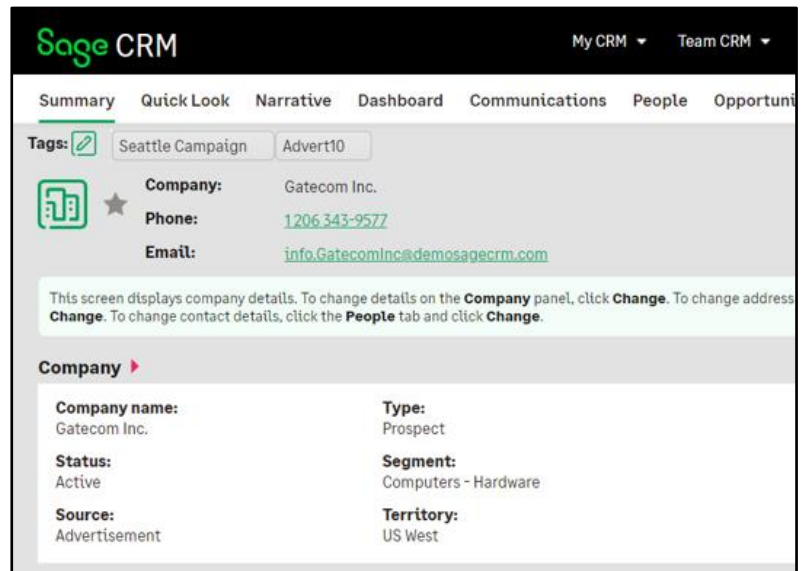
Working similarly to hashtags in some social networks, adding tags helps Sage CRM users classify and locate information quickly & simply.


Applying formatting to text fields.

Users can now format text fields with standard HTML.

- The application supports the applications of <B> and <I> formatting.

- Users can also mix and match formatting within text strings.

Supporting HTML formatting enables users to apply techniques like those used in social & other applications, to emphasize text for easier on-screen consumption.
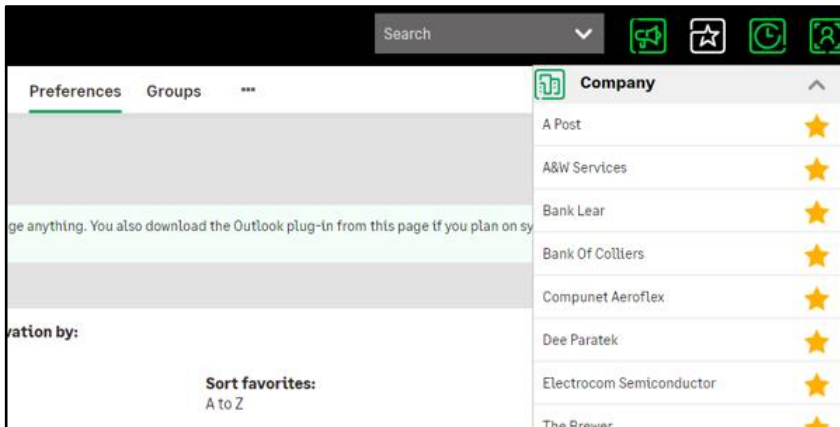
Offering more control to users for viewing their data.

- Users can now sort entries in a favourites list either by the first word in their name or oldest to newest.

This new feature gives power to both systems administrators – during system setup & management – and to individual users as required.

Updating our architecture for future advancement.

- Sage CRM continues to innovate & upgrade its' core for a secure future.

- We are building a new architecture, designed for resilience & scalability.
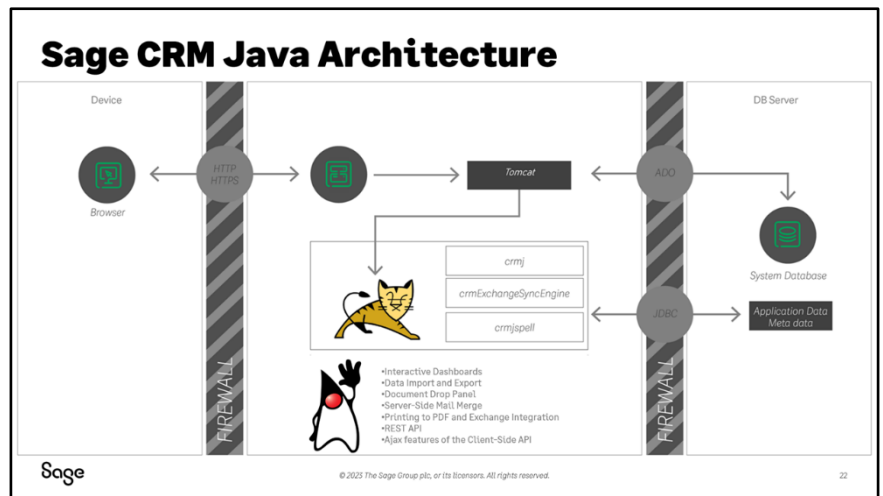
Sage CRM is transitioning to a fully 64-bit architecture, enhancing scalability, significantly improving performance and reducing vulnerability to potential security threats.
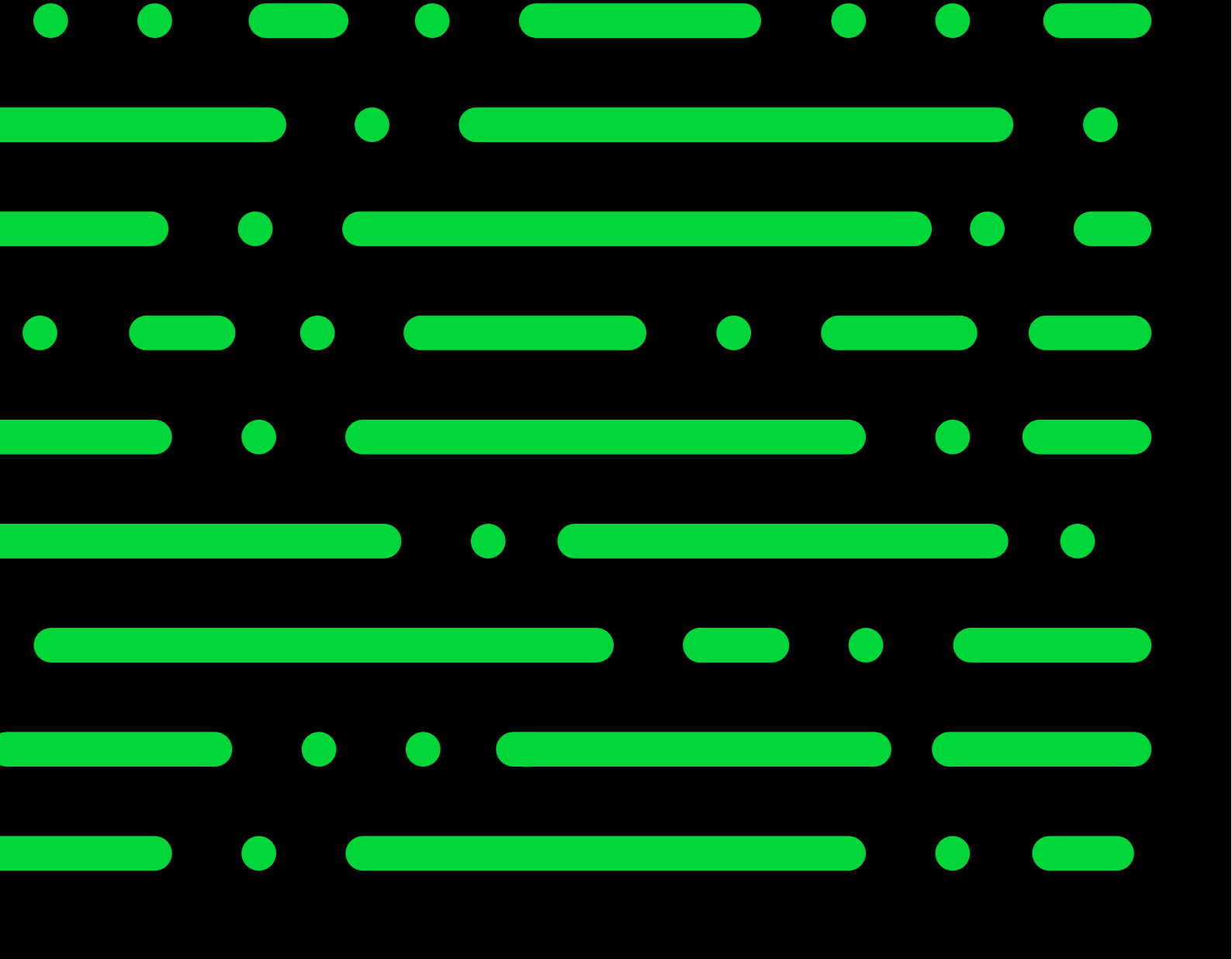
How CRM can help your business deliver an exceptional customer experience

A CRM solution helps you simplify the business processes, shorten marketing, sales & service cycles, and make the most of every customer contact opportunity.

Using CRM software, marketing teams can identify the sources of leads, opportunities, and closed sales. The software can help sales teams automate tasks such as creating orders, forecasting sales, progressing leads, and never missing opportunities using workflow. 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 2024 R1 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.