Sage CRM 2018 R1
Release Notes

Updated: November 2017

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Overview

This document provides information about the new features and enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 2018 R1 release. It is intended for Sage OpCos, Sage CRM partners, and Sage CRM customers.

While this document refers to Sage CRM, regional products may use different brand names.

Depending on the region you are in, you can obtain license keys for Sage CRM 2018 R1 to install specific product modules such as **Sales**, **Marketing**, and **Service** (or combinations of these modules). For more information on the availability of modules and the configurations available in your region, please contact your local Sage office.

When installing Sage CRM 2018 R1, you can optionally select to send anonymous Sage CRM usage statistics to Sage through Google Analytics. This information will allow Sage to improve the services and software we provide to our customers.

Release date and files included

Release date	Files included	Version
November 2017	eWare.dll	2018.0.1
	Outlook plugin	2018.0.1
	Document plugin	2018.0.1
	CTI plugin	2018.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2018 R1.

For more information about the software with which Sage CRM 2018 R1 can work and integrate, see the *Sage CRM 2018 R1 Software Requirements and Mobile Features* guide posted on the Sage CRM Help Center.

For online *User Help*, online *System Administrator Help*, and all PDF documentation for this release, go to the Sage CRM Help Center.

New features and enhancements

Sage CRM 2018 R1 provides new features and enhancements in the following areas:

- Calendar
- Horizontal Tabs and Main Menu
- Mapping Component
- Quotes and orders
- Numeric fields
- Metadata
- MailChimp Integration
- Exchange Integration
- Security
- SQL Server Express
- Apache Tomcat

Calendar

- **Simplified assignment of icons to custom actions** (11-169831). System administrators can assign icons to custom actions more easily. Just create a .gif file with the same name as the custom action code and copy it to **<Sage CRM installation folder>\WWWRoot\Themes\Img\Ergonomic\Choices\Comm_Action**.
  For more information, see the *Sage CRM 2018 R1 System Administrator Help* on the Sage CRM Help Center.
- **Tooltip on appointments in the Day view**. When a user clicks an appointment in the **Day** view, a tooltip showing the appointment summary opens.

- **Change appointment date and time by drag and drop** (0-169593-ENH). When using the **Day**, **Work Week**, or **Week** view in **My CRM** calendar, users can quickly change the date and time of non-recurring appointments by dragging and dropping them to the new date and time.
- **Change appointment duration by drag and drop**. Users can extend or reduce the appointment duration by dragging and dropping the upper or lower end of the appointment rectangle in the **Day**, **Work Week**, and **Week** views of the calendar.

  > **Note:** Drag and drop is not available on recurring appointments, appointments in **Team CRM** calendar, appointments in a colleague's calendar, and all-day appointments.

- **View team members added to a task or appointment** (0-169816-ENH). The **Agenda** and **Tasks** views in **Team CRM** calendar include a new **User** column that shows the users added to the **User** option in tasks and appointments. Note that the same task or appointment is listed in the **Agenda** and **Tasks** views as many times as there are users in the **Users** option.
- **Complete tasks quickly**. Users can quickly change the status of a task to **Complete** from the **Task** view in **My CRM** calendar. To do so, click the check box icon (☐) in the **Complete** column beside the task. As a result, the status of the task is set to **Complete**, and the icon in the **Complete** column changes to ☑.
- **Quickly create new tasks with attachments**. Users can drag and drop one or several files to the **Drop files here** area in the **Tasks** view of **My CRM** and **Team CRM** calendars to create tasks with attachments. Alternatively, users can click **Drop files here** to browse for and select the files they want to attach to new tasks. With this method, users can configure all possible task settings.
- **User and team selection is retained** (0-169732-ENH). The **My CRM for** and **Team CRM for** options retain the selected user or team when a user switches between the calendar views. When a user goes to a different Sage CRM area and then returns to the calendar, **My CRM for** and **Team CRM for** revert to the current user and team.
- **Filter settings in Tasks and Agenda views are retained**. The calendar filter retains the selected action, status, and type for the duration of a user session even if a user goes to a different Sage CRM area and then returns to the calendar. The calendar filter reverts to the default values at next logon.
- **Pending activities are shown by default**. The calendar filter on the **Agenda** and **Tasks** views is configured to show pending tasks and appointments by default.

Horizontal Tabs and Main Menu

Move rarely used tabs out of the way. Users can save screen space by selectively moving horizontal tabs to a new drop-down list called **More**, that is displayed beside the rightmost tab. This new feature is available on tabs related to standard and custom entities in the **My CRM** area. The **More** drop-down list is useful for the tabs that you use rarely but which you don't want to hide completely. **More** displays only if it contains at least one tab. For detailed information, see the *Sage CRM 2018 R1 User Help* on the Sage CRM Help Center.

To move a tab to the **More** drop-down list:

1. Do one of the following:
   - Go to **My CRM | Configure**.
   - Click the ellipsis icon (**...**) beside the rightmost horizontal tab in **My CRM** area.
2. In the window that opens, select the check boxes in the **Add to More** column beside the tabs you want to move to **More**.
3. Click **Save**.

> **Note: More** is not displayed in the Main Menu, so when you move a horizontal tab to **More**, its corresponding Main Menu item becomes hidden.

Mapping Component

Added support for multiple map service providers. A new version of the Mapping Component is now available on the **Sage CRM Community | Marketplace**.
When using the new Mapping Component, system administrators can select a map service provider to be used with Sage CRM. The new Mapping Component supports such map service providers as OpenStreetMap and its contributors, Stamen, Esri, F4map, Komoot, and ViaMichelin. The underlying data regarding hotels, airports, pubs, and restaurants is still provided by MapQuest.

For detailed instructions on how to configure the Mapping Component, see the *Sage CRM 2018 R1 System Administrator Help* on the [Sage CRM Help Center](). The new Mapping Component is compatible with Sage CRM 2018 R1, 2017 R3, 2017 R2, 2017 R1, 7.3 SP3, 7.3 SP2, 7.3 SP1, and 7.3.

> **Note:** The Mapping Component is released separately from Sage CRM and is available for download at https://community.sagecrm.com/add_on_store/m/sage_crm_downloads/22244.aspx.

Quotes and orders

- **Prevent automatic screen scroll** (0-169033-ENH). The screen doesn’t scroll up when a user creates or updates a line item in a quote.
- **Refactored Advanced Search Select fields**. All items in a drop-down list remain visible, even if the list doesn't fit into the browser window.
- **Refactored merge fields** (0-164151-ENH). All merge fields in Word templates are now populated correctly.

Numeric fields

Thousands separators (0-169529-ENH). All numeric fields in Sage CRM now display thousands separators in read mode.

Metadata

Faster metadata refresh. Metadata refresh has been refactored to work faster. This new feature is available on new Sage CRM installations and upgrades.

MailChimp Integration

Detection of duplicate and incorrect email addresses. Sage CRM detects when a user is trying to send duplicate email addresses or email addresses in an incorrect format to MailChimp, and displays a warning notification.

Exchange Integration

Refactored appointment synchronization (0-168784-ENH). Sage CRM no longer creates temporary duplicate appointment entries during synchronization with Exchange Server.

Security

Prevent connections to the same session from different computers. A new option **Use browser session security** in **<My profile> | Administration | System | System behavior** allows system administrators to control whether users can connect to their current Sage CRM session using the same SID and access URL on a different computer. By default, this option is set to **Yes**, preventing connections to the same user session from different computers.

> **Warning:** When **Use browser session security** is set to **Yes**, cookies must be enabled on all client computers. Ensure that cookies are enabled before upgrading to Sage CRM 2018 R1. If cookies cannot be enabled on all client computers, set **Use browser session security** to **No** after upgrading.

SQL Server Express

Support for SQL Server Express. Sage CRM 2018 R1 supports Microsoft SQL Server Express 2014 64-bit edition in a production environment. This version of SQL Server Express is bundled with Sage CRM 2018 R1 and system administrators can easily install it when running the Sage CRM Setup.

> **Note:** Limitations apply. For details, see the following:
> - *Sage CRM 2018 R1 Software Requirements and Mobile Features Guide* on the Sage CRM Help Center.
> - Features supported by the editions of SQL Server 2014 on msdn.microsoft.com.

Apache Tomcat

New Tomcat version (0-170007-ENH). Sage CRM installs and uses Apache Tomcat 7.0.82, which provides enhanced security. Apache Tomcat 7.0.82 is installed if you perform a new Sage CRM installation or upgrade from an earlier Sage CRM version.

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2018 R1.

The status **Cannot reproduce** in the table below means that the issue could not be reproduced in Sage CRM 2018 R1. Install Sage CRM 2018 R1 to resolve the issue.

> **Note:** After you install Sage CRM 2018 R1, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
0-168944-QA	.NET API	When a user saved an edited communication record, an error occurred.	This issue is fixed.
0-169402-QA	Cases	When a user copied an emoji to a text box in Sage CRM, a validation error occurred.	This issue is fixed.
0-169697-QA	Comms/Diary	When some additional appointment fields were set as required, the creation of a quick appointment in the calendar failed.	This issue is fixed.
0-169566-QA	Comms/Diary	Deleting the default action for a quick appointment caused a "Bad request" error.	This issue is fixed.
0-169419-QA	Comms/Diary	An appointment whose **Company** and **Person** fields were populated wasn't shown in the calendar for the users added to the **Users** field.	This issue is fixed.

Issue ID	Area	Description	Status
0-169503-QA	Comms/Diary	When some person fields were reconfigured, it caused **null** to appear in the person name in the calendar.	This issue is fixed.
0-169498-QA	Comms/Diary	The paperclip icon was present on communications that actually didn't have any attachments.	This issue is fixed.
0-169270-QA	Comms/Diary	When a system administrator changed the duration of work week in the system settings, the change wasn't reflected in the **Work Week** view of the calendar.	By design.
0-169602-QA	Comms/Diary	Users with an unrestricted security profile couldn't view private appointments created by other users on their team.	This issue is fixed.
0-169473-QA	Core Product	Custom captions were deleted when a user pressed the **Enter** key in the Firefox web browser.	This issue is fixed.
0-169273-QA	Core Product	When all Sage CRM components were working correctly, the System Health page erroneously showed that some components had issues.	This issue is fixed.
0-169573-QA	Core Product	When Sage CRM was configured to use a custom HTTP port, the System Health page erroneously showed that some components had issues.	This issue is fixed.
0-168704-QA	Core Product	Cross-site scripting filters were missing on some fields.	This issue is fixed.
11-169829	Core Product	Notifications were not clickable.	This issue is fixed.
0-169320-QA	Customization	Saving a case caused an intermittent JavaScript error.	This issue is fixed.
0-167234-QA	Customization	The `CRM.Url` method generated wrong URLs.	This issue is fixed.

Issue ID	Area	Description	Status
0-169076-QA	Customization	When a field was set as required by placing *required = true* in the **Create Script** text box, it was still possible to leave the field blank.	This issue is fixed.
0-169523-QA	Customization	Custom fields couldn't be deleted on the company entity.	Cannot reproduce.
0-169470-QA	Customization Wizard	Users without sufficient rights were able to access a custom entity whose action was set to **customdotnetdll**.	This issue is fixed.
0-168992-QA	Dashboard	Filtering by country didn't work correctly in a gadget based on a report.	This issue is fixed.
0-169516-QA	Interactive Dashboard	Sage CRM Setup didn't check if the port selected for Apache Tomcat was available and working properly.	This issue is fixed.
0-169501-QA	Interactive Dashboard	On a Sage 300 integration, when a user tried to create an SData feed template, the list of entities was empty.	This issue is fixed.
0-169487-QA	Interactive Dashboard	On a Sage 300 integration, an Interactive Dashboard gadget based on a Company Summary Report returned an error.	This issue was fixed in Sage CRM 2017 R3, case 0-168665-QA. For details, see the *Sage CRM 2017 R3 Release Notes* on the Sage CRM Help Center.

Issue ID	Area	Description	Status
0-169299-QA	Data Upload	System administrators were able to make the following system fields required: • **lead_leadid** • **lead_timestamp** • **case_caseid** • **oppo_opportunityid** As a result, when a user tried to upload leads, data upload failed with an error stating that the **lead_leadid** and **lead_timestamp** fields should be mapped.	This issue is fixed. Now system administrators cannot make these fields required.
0-169243-QA	Deduplication	Instructions on the company deduplication screen were unclear in a scenario where a user tried to rename a company using a company name that was already in use.	This issue is fixed.
0-169549-QA	Email Client	A system administrator couldn't create and change an email signature for a user.	By design.
0-169576-QA	E-Marketing (MailChimp)	When a group was sent to MailChimp, an error occurred.	By design. This happens when a group has duplicate email addresses or email addresses in an incorrect format.
0-169595-QA	Exchange Integration	Exchange Server synchronization failed with an error "Unmarshalling error: unexpected element".	Cannot reproduce.
0-169003-QA	Interactive Dashboard	When a user tried to create a gadget based on a report, existing report fields were not available for selection.	This issue is fixed.
0-169220-QA	Licensing	After upgrading Sage CRM, a "Company name mismatch" error occurred.	Cannot reproduce.

Issue ID	Area	Description	Status
0-168941-QA	Lite Outlook Plugin	When a user password contained special characters or exceeded 20 characters, the user couldn't log on from the Lite Outlook Plugin.	This issue is fixed.
0-169662-QA	Lite Outlook Plugin	When TLS 1.1 was enabled, the Lite Outlook Plugin failed to install.	This issue is fixed.
0-169605-QA	Mobile App	After upgrading from Sage CRM 7.2, the Sage CRM for Android app stopped working.	By design. For HTTPS connections, Android requires a signed and trusted certificate to be installed on the Sage CRM server.
0-169514-QA	Mobile Theme	The **Created Date** field didn't contain any values on mobile screens.	This issue is fixed.

Issue ID	Area	Description	Status
0-168054-QA	Mobile Theme	ISSUE 1 When creating a new opportunity record in the mobile theme, it wasn't possible to select a company. ISSUE 2 Graphic was cut on some reports. ISSUE 3 The **Created by** filter didn't work on some reports. ISSUE 4 A classic dashboard created in the desktop theme wasn't available in the mobile theme.	ISSUE 1 This issue is fixed for new installations of Sage CRM. To fix this issue after upgrading to Sage CRM 2018 R1: 1. Log on to Sage CRM as a system administrator. 2. Go to **<My Profile> | Administration | Customization | Opportunity**. 3. Click the **Screens** tab. 4. For devices **Mobile default for unknown devices** and **Mobile device (iPhone, Blackberry, Nokia etc.) with color screen**, modify the **OpportunityDetailBox** screen to add the following fields: - **Company (oppo_primarycompanyid)** - **Person (oppo_primarypersonid)** 5. Save your changes. ISSUE 2 Cannot reproduce. ISSUE 3 Cannot reproduce. ISSUE 4 By design.
0-169703-QA	Mobile Theme	The **New** button was missing from mobile screens.	This issue is fixed.

Issue ID	Area	Description	Status
0-167075-QA	Mobile Theme	When a user created a new communication record, it wasn't possible to select an item in the **Action** list.	This issue is fixed.
0-169664-QA	Navigation	When a user cleared the **Exclude** check boxes next to some records in a group and saved the changes, the cleared check boxes were selected again.	This issue is fixed.
0-169200-QA	Outlook Integration - Classic	A sync performed using the Classic Outlook Plugin removed some appointments from the **Team CRM** calendar.	This issue is fixed.
0-169540-QA	Outlook Integration - Classic	An attempt to file an email in Microsoft Outlook caused an error.	This issue is fixed.
0-168420-QA	Performance/ Scalability	HTTP headers contained information about the third-party components used in Sage CRM.	This issue is fixed.
0-169950-QA	Quotes/Orders	After merging a quote to Word or PDF, some images weren't displayed in the output document.	This issue is fixed.
0-169484-QA	Quotes/Orders	When a user created and saved a new order for an opportunity, the order was numbered incorrectly.	This issue is fixed.
0-168997-QA	SData Provider	Using reserved XML characters in an SData string caused an error.	Now the ampersand character (&) in SData strings is processed correctly. When using a backslash (\) or double-quotes ("), escape them with a backslash as follows: \\ \″

Issue ID	Area	Description	Status
0-169475-QA	SMS	The **Send SMS Message** workflow action didn't send SMS messages.	This issue is fixed.
0-168582-QA	Workflow	New tasks created by a workflow had their **Start Date/Time** field populated.	This issue is fixed.
0-168776-QA	Workflow	The **Create Script** text box in a workflow rule had a limit of 1024 characters.	This issue is fixed. The maximum number of characters has been increased to 2048.
0-168586-QA	Workflow	The **Create Appointment** action in a workflow created tasks instead of appointments.	This issue is fixed.

Upgrading

You can use the Sage CRM 2018 R1 installation package to upgrade from versions 2017 R3, 2017 R2, 2017 R1, 7.3 SP3, 7.3 SP2, 7.3 SP1, and 7.3. To upgrade from an earlier version of Sage CRM, please first upgrade to one of the versions listed here.

After upgrading Sage CRM, you must log on to Sage CRM as a system administrator at least once before upgrading to the next version. This is required to update the Sage CRM database correctly.