



# Sage CRM 2020 R2 Release Notes

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# Overview

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This document provides information about the new features and enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 2020 R2 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 2020 R2 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 2020 R2, 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
July 2020	eWare.dll	20.20.0.2
	Outlook plugin	20.20.0.1
	Document plugin	20.20.0.1
	CTI plugin	20.20.0.1

# Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2020 R2.

For more information about the software with which Sage CRM 2020 R2 can work and integrate, see the *2020 R2 Hardware and Software Requirements* 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](#).

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

# New features and enhancements

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Sage CRM 2020 R2 provides new features and enhancements in the following areas:

- [Exchange Online \(Office 365\)](#)
- [Mailchimp](#)
- [Advanced Customization Wizard](#)
- [Software Development Kit \(SDK\)](#)
- [Logging](#)
- [Support for new software](#)

## Exchange Online (Office 365)

- **Support for OAuth 2.0.** You can configure Sage CRM to use OAuth 2.0 authentication when working with Exchange Online. This is particularly important because Microsoft have announced that they are turning off Basic Authentication in Exchange Online on the 13th October 2020. To continue using integration with Exchange Online in Sage CRM after that date, you must enable and configure OAuth 2.0. For details, see the steps below.

## Configuring OAuth 2.0 for Exchange Online

- [Step 1: Add ApplicationImpersonation role in Exchange Online](#)
- [Step 2: Register Sage CRM as a new app in Azure Active Directory](#)
- [Step 3: Configure Exchange Integration in Sage CRM](#)

## Step 1: Add ApplicationImpersonation role in Exchange Online

1. Sign in to the [Exchange admin center](#) in Office 365.
2. Add the **ApplicationImpersonation** role to your Office 365 administrator account:
  - a. Go to **permissions | admin roles**.
  - b. Click the plus sign (+) to create a new role group for Sage CRM:
    - In **Name**, enter a descriptive name for the group (for example, **Sage CRM impersonation**).
    - Under **Roles**, click the plus sign (+) and add the **ApplicationImpersonation** admin role.
    - Under **Members**, click the plus sign (+) and add your Office 365 admin account.
  - c. When you are done, click **Save**.

## Step 2: Register Sage CRM as a new app in Azure Active Directory

1. Sign in to the [Azure Active Directory admin center](#).
2. Go to [App registrations](#).
3. Click **New registration** and do the following:
  - a. In **Name**, enter a descriptive name for the application (for example, **Sage CRM**).
  - b. Under **Supported account types**, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant)**.
  - c. Under **Redirect URI (optional)**, select **Public client/native (mobile & desktop)** and enter the following URI:  

```
http://localhost/<install name>/CustomPages/OAuth/callback.html
```

Where *<install name>* is the name of your Sage CRM installation, all lowercase.  
Use *https://* if your installation is configured to use HTTPS.
  - d. Click **Register**, copy the application (client) ID that displays and store it in a file.
4. Add the **EWS.AccessAsUser.all** permission for your app:
  - a. Click **API permissions**, and then click **Add a permission**.
  - b. On the **Microsoft APIs** tab, click **Exchange**, and then click **Delegated permissions**.
  - c. Expand **EWS** to select **EWS.AccessAsUser.All**.
  - d. Click **Add permissions**.



## Step 3: Configure Exchange Integration in Sage CRM

To complete the steps below, open a web browser on the Sage CRM server and enter the Sage CRM access URL replacing the server name or IP address with *localhost*. For example: *http://localhost/crm*.

**Note:** If you have Microsoft Office 365 credentials cached on the Sage CRM server, you may encounter errors while completing the below steps. To avoid errors, we recommend that you either complete these steps in an incognito tab of your web browser or clear your web browser's cache.

1. Log on to Sage CRM as a system administrator.
2. Go to **<My profile> | Administration | System | System Behavior** and click **Change**.
3. Make sure that **Use Exchange Server Integration** is set to **Yes**.
4. Go to **<My profile> | Administration | E-mails and Documents | Exchange Server Integration | Connection Management** and click **New**.]
5. Complete the following options:
  - In **Exchange Type**, select **Exchange Online (Office 365)**.
  - In **Exchange Web Service URL**, enter **https://outlook.office365.com/EWS/Exchange.asmx**.
  - In **Application (client) ID**, enter the ID you copied in *Step 2: Register Sage CRM as a new app in Azure Active Directory*.
6. Click **Save**.

You may be prompted to sign in to your Office 365 admin account and grant permissions to the Sage CRM app you have registered earlier.

# Mailchimp

- **New behaviour of the automatic detection of duplicate emails.** Now when the **Detect duplicate emails** option in <My profile> | Administration | System | System Behaviour is enabled, it prevents you from using the same email address to create two records of the same type (that is, Company, Person, or Lead). For example, you can create a Person, a Lead, and a Company record with the same email address, but you cannot create two Person records with the same email address.

Previously the **Detect duplicate emails** option prevented the creation of two records with the same email address regardless of the record type.

- **Improved Duplicate Emails screen.** You can click last name or company name in the list to view the related Person, Company, or Lead record.

## Advanced Customization Wizard

- **Create entities with .NET support regardless of installed license type.** With this enhancement, the **For Dot Net** check box is now always available in the Advanced Customization Wizard when creating a new entity, regardless of installed Sage CRM license type. When selected, this check box creates a custom entity without ASP pages. To customize the entity, use a .NET DLL.

Previously the **For Dot Net** check box was available only when you had a Sage CRM developer license installed.

## Software Development Kit (SDK)

A new Sage CRM SDK is now available. Partners can download the SDK at [https://community.sagecrm.com/partner\\_community/m/example\\_components\\_developer\\_resources/28622.aspx](https://community.sagecrm.com/partner_community/m/example_components_developer_resources/28622.aspx).

**Note:** You will be prompted to log on to the Sage CRM Partner Community.

The new SDK provides the following enhancement:

- **Relaxed installation requirements.** The SDK Setup doesn't require a developer license key to be installed. Also it doesn't check the installed Sage CRM version.

# Logging

- **New location and name of the logging configuration file.** The new name of the file that stores logging configuration settings for Sage CRM components is **log4j2.xml** and you can find it in the following location on a Sage CRM server:

**<Sage CRM installation folder>\WWWRoot\tomcat\webapps\<InstallName>j\WEB-INF\classes**

where

- **<Sage CRM installation folder>** is the folder you specified when installing Sage CRM. By default, this is **%ProgramFiles(x86)%\Sage\CRM\CRM**.
  - **<InstallName>** is the installation name you specified when installing Sage CRM. By default, this is **CRM**.
- **Automatic archiving of log files.** Now when the size of a log file exceeds 500 MB, the file is automatically moved to a gzip archive located in the folder where the log file originally resided. The archive has the following name and extension:

**%i.log.gz**

where **%i** is the increment number assigned to the archive.

# Support for new software

- **Microsoft SQL Server 2019.** Sage CRM now supports the latest version of SQL Server. You can host Sage CRM database on SQL Server 2019 with Cumulative Update 4 or earlier installed.
- **Microsoft SQL Server 2017 CU 20.** You can host Sage CRM database on SQL Server 2017 with Cumulative Update 20 or earlier installed.

# Discontinued features

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- **Support for Microsoft SQL Server 2016.** Sage CRM 2020 R2 does not support this SQL Server version.

# Addressed issues

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This section lists the issues reported by our customers that are addressed in Sage CRM 2020 R2.

**Note:** After you install Sage CRM 2020 R2, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
CRMS-4	Calendar/Calendar List	After adding the <b>Date Created</b> field as a new column to the Calendar List, it wasn't possible to filter the values in that column.	This issue is fixed.
CRMS-81	Calendar/Calendar List	When the <b>Show overdue tasks</b> check box was selected in the calendar, the maximum number of tasks in the list was limited to 1000.  As a result, some overdue tasks were not displayed.	This issue is fixed.  Now the calendar shows all overdue tasks.
CRMS-157	Calendar/Calendar List	When a user tried to open a task, an error occurred.	This issue is fixed.
CRMS-99	Companies/People	Scroll bar wasn't displayed at the bottom of the <b>Notes</b> tab for a Company record.  As a result, it was impossible to view long notes.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-12	Companies/People	When a user clicked the <b>New email</b> button, they were prompted to install a Document (ActiveX) plugin, even though ActiveX had been removed as a dependency in the previous version of Sage CRM.	By design. Documentation updated.
CRMS-132	Configuration, Workflow	A workflow action configured to reassign a forecast value unexpectedly reset the value to 0.  This issue occurred when the decimal point character and the thousand separator character were changed to non-default values.	This issue is fixed.
CRMS-68	Customization	A table-level script with delete function failed to work.	This issue is fixed.
CRMS-159	Customization	An unexpected event error occurred when a user entered a note on a custom entity record.	This issue is fixed.
CRMS-152	Customization	The <b>Add File</b> button on a custom entity record erroneously saved the attached file to the Document Templates screen.	This issue is fixed.
CRMS-114	Customization	An error message configured in a validation script was displayed several times in the user interface.	This issue is fixed.
CRMS-160	Dashboard, Reports	Legend wasn't displayed for a chart when the <b>Show Legend</b> check box was selected in the chart options.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-7	Document Drop	Drag and drop from Microsoft Outlook to Sage CRM didn't work in Internet Explorer.	By design. When using Internet Explorer or Firefox, drag an email from Outlook to the desktop first, and then drag the email to Sage CRM.
Internal issue	Documentation	The Administrator Help and Guide erroneously stated that in order to enable automatic login, the <b>Anonymous Authentication</b> option must be enabled in IIS.	This issue is fixed.
CRMS-120	General Issue	After changing the user interface language in Sage CRM, the labels in the Change Password screen were displayed in the language that was set previously.	This issue is fixed.
CRMS-109	General Issue	When a user tried to add a company while filing an email in Outlook, some buttons were missing from the Add Company dialog box.	This issue is fixed.
Internal issue	Installation	Sage CRM Setup was dependent on a deprecated version of TLS (1.1).	This issue is fixed.
Internal issue	Integration	After syncing a new account from Sage CRM to an integrated system, an error occurred when creating a quote.	This issue is fixed.
Internal issue	Integration, SData	A table-level script failed when it was run under a user account whose password was hashed.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-30	Leads	When a user tried to open a Lead record, an error occurred stating that the user didn't have access to view that entity, even though the user had sufficient view rights.	This issue is fixed.
CRMS-55	Licensing	An error "Unregistered version of Sage CRM" occurred every time after restarting the server, even though Sage CRM was properly registered.	This issue is fixed.
CRMS-61	Mail Merge	When a user clicked <b>Edit Merged Document</b> , the document didn't open in an editor. Clicking <b>Edit Merged Document</b> for a second time caused an error.	This issue is fixed.
CRMS-102	Mailchimp	When Mailchimp Integration was enabled, clicking the <b>Marketing</b> tab caused an error.	This issue is fixed.
CRMS-167	Mailchimp	When a user sent a Company record to Mailchimp, the <b>Territory</b> field of the record wasn't populated.	This issue is fixed.
CRMS-19	Quick Find/Search	An "Error creating core" message was written to the Quick Find log.  Despite the message, Quick Find continued to work normally.	By design.  This issue is caused by a third-party component used by Quick Find.  Ignore this error, because it does not affect Quick Find.



Issue ID	Area	Description	Status
CRMS-32	Reports	The readings of a gadget based on the <b>My Actual Vs. Target</b> report were unclear sometimes.	By design.  This behavior is caused by the Fusion Charts component used by Sage CRM.
CRMS-111	User Interface	In some cases, the following user interface elements were missing after resizing the Sage CRM window: <ul style="list-style-type: none"> <li>• Action buttons</li> <li>• The down arrow button on the vertical scroll bar</li> <li>• The horizontal scroll bar</li> </ul>	This issue is fixed.
CRMS-13	Web Services	When an application used the Web Services interface to set the value of a variable to the Product Family name and the name contained an ampersand character (&), a parsing error occurred.	This issue is fixed.
CRMS-14	Web Services	When an application retrieved a Sage CRM record whose name contained an ampersand character (&) though the Web Services interface, the ampersand was omitted from the record name.	By design.  The application was incorrectly processing data from Sage CRM.
CRMS-37	Workflow	When a user tried to merge a document and create a communication using a workflow, an error occurred.	This issue is fixed.
CRMS-27	Workflow	A user with View/Insert permissions on the Company entity could not view workflows related to a Company record.	This issue is fixed.

# Installing and upgrading

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**Note:** Install only one Sage CRM instance per server. Sage doesn't support configurations where two or more Sage CRM instances are installed on the same server.

## Installation prerequisites

Before installing Sage CRM, make sure you have *Microsoft OLE DB Driver 18 for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

[Click here to download Microsoft OLE DB Driver 18 for SQL Server](#)

If you don't have this driver installed, the Sage CRM Setup will not be able to connect to the SQL Server.

## Upgrade path


You can use the Sage CRM 2020 R2 installation package to upgrade from versions 2020 R1, 2019 R2, 2019 R1, 2018 R3, 2018 R2, and 2018 R1.

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.

# Post-upgrade tasks

Re-enter the Sage CRM system administrator password after you have upgraded Sage CRM that is integrated with another system. This is required to hash and securely store the password.

1. Log on to Sage CRM as a system administrator.
2. Go to  | **Administration | Integration | Integration List** and click the integration for which you want to re-enter the password.
3. Click **Disable** and then click **Continue**.
4. Click **Change**.
5. In the **CRM Password** text box, re-enter the password.
6. Click **Save**.
7. Click **Enable**.

**Note:** You must re-enter the Sage CRM system administrator password using the steps above whenever you modify your integration.