Sage CRM 2023 R2
Release Notes

Updated: September 2023

Contents

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 2023 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 2023 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 2023 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	eWare.dll version
September 2023	20.23.0.2

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2023 R2.

For more information about the software with which Sage CRM 2023 R2 can work and integrate, see the *2023 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.

Installing and upgrading

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 or upgrading Sage CRM, make sure that:

- Your environment meets the *Sage CRM 2023 R2 Hardware and Software Requirements* published on the **Sage CRM Help Center**.
- You have *Microsoft OLE DB Driver for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

  Download Microsoft OLE DB Driver for SQL Server

  You need to install driver version 18 or later. If you don't have this driver installed, the Sage CRM Setup cannot connect to the SQL Server.

Note: If you make Sage CRM available outside your corporate network, consult your Sage business partner about protecting your data, enable Secure Socket Layer (SSL) and make sure that users connect to Sage CRM via a Virtual Private Network (VPN).

Upgrade path

You can use the Sage CRM 2023 R2 installation package to upgrade from versions 2023 R1, 2022 R2, 2022 R1, 2021 R2, and 2021 R1.

To upgrade from an earlier version of Sage CRM, please first upgrade to one of the versions listed here.

Consider the following:

- Computer telephony integration (CTI) has been removed from Sage CRM and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2023 R2 completely removes CTI.
- The **File extension restrictions** blocklist was discontinued in Sage CRM 2023 R1. If you are upgrading from a pre-2023 R1 version, the Sage CRM Setup does not transfer the file name extensions from **File extension restrictions** to Sage CRM 2023 R2. You need to transfer these restrictions manually.

Post-installation/upgrade tasks

- Sage CRM Setup cannot upgrade Microsoft SQL Server Express installed with a previous Sage CRM version. As a result, you may end up with Sage CRM using an unsupported Microsoft SQL Server Express version. If necessary, manually upgrade Microsoft SQL Server Express after upgrading Sage CRM.

  For supported Microsoft SQL Server Express versions, see *Sage CRM 2023 R2 Hardware and Software Requirements* published on the **Sage CRM Help Center**.

- Make sure that user passwords in Sage CRM are not blank. We test Sage CRM features in an environment where every user has a nonblank password assigned. If you have blank user passwords in your environment, Sage CRM features may behave unpredictably.

- 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.

- Clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly

- 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.

  a. Log on to Sage CRM as a system administrator.

  b. Go to **| Administration | Integration | Integration List** and click the integration for which you want to re-enter the password.

  c. Select **Disable** and then select **Continue**.

  d. Select **Change**.

  e. In the **CRM Password** text box, re-enter the password.

  f. Select **Save**.

  g. Select **Enable**.

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

Supported themes

The only supported Sage CRM theme is Contemporary.

We recommend that after installing or upgrading Sage CRM system administrators make sure that the Contemporary theme is set as the default theme.

For details, see *Changing the default theme* in the *Sage CRM 2023 R2 System Administrator Help* published on the **Sage CRM Help Center**.

New features and enhancements

Sage CRM 2023 R2 provides the following new features and enhancements:

- **OAuth 2.0 in Exchange Online: Support for single tenant**
- **View workflow rules and actions without disabling workflow**
- **Set default timestamp for imported emails**
- **New columns when importing emails from Exchange Online**
- **Open multiple read-only tabs**
- **Narrative enhancements**

OAuth 2.0 in Exchange Online: Support for single tenant

Feature ID: CRMS-1280

When configuring OAuth 2.0 for an Exchange Online integration in Sage CRM, you can specify whether your Sage CRM app in Microsoft Entra ID supports a single tenant or multiple tenants.

To do so, use a new option **Supported account type** when creating a new or modifying an existing connection to Exchange Online in Sage CRM (**| Administration | Emails and Documents | Exchange Integration | Connection Management**).

Complete the below steps to configure OAuth 2.0 for Exchange Online. Before you begin, make sure that your Office 365 administrator account has a mailbox configured in Exchange Online.

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. Select 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**, select the plus sign (**+**) and add the **ApplicationImpersonation** admin role.
      - Under **Members**, select the plus sign (**+**) and add your Office 365 admin account. The account must have a mailbox configured in Exchange Online.
3. When you are done, select **Save**.

Step 2: Enable mail app access in Microsoft 365

1. Sign in to the **Microsoft 365 admin center**.
2. Go to **Active users**.
3. For each user in the list, do the following:
    a. Select user's display name.
    b. In the dialog that opens, select the **Mail** tab.
    c. Select **Manage mail apps**.
    d. In the dialog that opens, select check boxes next to all apps except **Outlook desktop (MAPI)** and **IMAP**.
    e. Save your changes.

Step 3: Register Sage CRM as a new app in Entra ID

1. Sign in to the **Microsoft Entra admin center** as an administrator.
2. Go to **App registrations**.
3. Register a new application:
    a. Select **New registration**.
    b. Enter a descriptive name for the application.
    c. Under **Supported account types**, select one of the following:
        - **Accounts in this organizational directory only (Default Directory only - Single tenant)** if you want your Sage CRM app to support a single tenant.
        - **Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)** if you want your Sage CRM app to support multiple tenants.

        > **Note:** Sage CRM does not support other options under **Supported account types**.

4. Under **Redirect URI (optional)**, select **Public client/native (mobile & desktop)** and enter the following URIs:
   - *http://localhost/<install name>/custompages/oauth/callback.html*
   - *https://<server name>/<install name>/custompages/oauth/callback.html*

   If your Sage CRM server is accessible on the internet, also add:
   - *https://<server FQDN>/<install name>/custompages/oauth/callback.html*

   In these URIs:
   - *<install name>* is the name of your Sage CRM installation. It must be all lowercase.
   - *<server name>* is the name of the Sage CRM server. It must be all lowercase.
   - *<server FQDN>* is the fully qualified domain name of the Sage CRM server. It must be all lowercase.
5. Select **Register**.
6. Copy the application (client) ID that displays and store it in a file.
7. Go to **API permissions** and add the following Microsoft Graph delegated permission for your app:
   - EWS.AccessAsUser.all

Step 4: Configure Exchange Integration in Sage 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. 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*
2. Log on to Sage CRM as a system administrator.
3. Go to **<My profile> | Administration | System | System Behavior** and click **Change**.
4. Make sure that **Use Exchange Integration** is set to **Yes**.

5. Go to **<My profile> | Administration | Emails and Documents | Exchange Integration | Connection Management** and click **New**.

6. 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 3: Register Sage CRM as a new app in Entra ID*.
   - In **Supported account type**, enter one of the following values, depending on how your app in Entra ID is configured:
     - *common*. Enter this value if your app in Entra ID supports multiple tenants.
     - *{Tenant ID}* or *{domain name}*. Enter a tenant ID or domain name if your app in Entra ID supports a single tenant.
   - **OAuth authority URL** shows the authentication URL that Sage CRM uses for the specified account type, that is, *https://login.microsoftonline.com/{account type}/oauth2/v2.0*, where *{account type}* is either *common* or *{tenant ID}/{domain name}*.

7. Select **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.

View workflow rules and actions without disabling workflow

Feature ID: CRMS-523

A system administrator no longer needs to disable a workflow to view the details of its rules and underlying actions. In the previous Sage CRM versions, a system administrator had to disable a workflow in order to do so.

1. Go to **| Administration | Advanced Customization | Workflow**.

2. Select a workflow from the list.

   Under **Available Rules**, the names of the workflow rules are formatted as hyperlinks. You can select them to view the details of the rules and underlying actions. Note that to change the workflow rules, you still need to disable the workflow.

Set default timestamp for imported emails

Feature ID: CRMS-1197, CRMS-1468

A new option **Default timestamp for imported emails** in user preferences enables users and system administrators to set the default timestamp to apply to the emails imported from Microsoft Exchange Online.

To configure this new option:

- A user should go to **| Preferences**.
- A system administrator should go to **| Users | Users**, search for and select a user, and then select **User Preferences**.

Locate **Default timestamp for imported emails** and select one of the following:

- **Use email date**. Marks the imported messages with their original sent date (if the messages are outgoing) or received date (if the messages are incoming).
- **Use current date**. Marks the imported messages with the current date.

For consistency with this new option, we have also changed the screen where a user imports emails to replace the **Use email date** check box with a **Timestamp for imported emails** drop-down list.

How it works

The timestamp selected in **Default timestamp for imported emails** is also selected by default in **Timestamp for imported emails** on the screen where a user imports messages from Microsoft Exchange Online. A user can change the timestamp in **Timestamp for imported emails** before they start importing messages.

New columns when importing emails from Exchange Online

Feature ID: CRMS-1197, CRMS-1334

We have added a new column to the screen that opens when a user selects **Import Emails** to import messages from Microsoft Exchange Online. The new column indicates whether a message contains one or more attachments. If so, the column displays a paperclip icon ().

Now the columns on this screen change depending on the folder selected by a user in Exchange Online.

If the selected folder contains outgoing messages (for example, a user selected **Sent**), the screen provides the following columns:

- **To**. Shows the names of the recipients.
- **Email Addresses**. Shows the email addresses of the recipients.
- **Sent**. Shows the date and time when the email was sent.

If the selected folder contains incoming messages (for example, a user selected **Inbox**), the screen provides the following columns:

- **From**. Shows the name of the sender.
- **Email Address**. Shows the email address of the sender.
- **Received**. Shows the date and time when the email was received.

Open multiple read-only tabs

This new feature enables you to work with Sage CRM using multiple browser tabs.

When working with standard entity records such as Company, Lead, or Opportunity, you may need to constantly switch between their tabs to view the information provided there. Now you can avoid the switching by opening entity tabs in separate read-only browser tabs. Then, you can arrange the browser tabs on your monitor to view them all at once.

To check if you can open a read-only browser tab from an entity tab, point to the entity icon provided on the tab. If the **Open in read-only tab** tooltip displays, click the icon to open a read-only browser tab.

For example, on the **Summary** tab of a Person record, click .

> **Note:** To edit the information displayed on a read-only browser tab, return to the original entity tab from which you opened the read-only tab.

You can open the following Sage CRM tabs in read-only mode:

Tab	Read-only mode available on
Addresses	Company and Person entities
Attachments	Standard entities on which this tab is available
Campaign List	Standard entities on which this tab is available
Cases	• Company, Person, and Solution entities • **My CRM** menu • **Team CRM** menu
Communications	Standard entities except Communication
Company Team	Company entity
Documents	Standard entities except Communication

Tab	Read-only mode available on
External Attendees	Standard entities on which this tab is available
Groups	• Standard entities on which this tab is available • **My CRM** menu
Leads	• **My CRM** menu • **Team CRM** menu
Notes	Standard entities except Communication
Opportunities	• Company and Person entities • **My CRM** menu • **Team CRM** menu
People	Company and Person entities
Phone/email	Company and Person entities
Quick Look	Company and Person entities
Solutions	• Case entity • **Team CRM** menu
Summary	Standard entities except Communication, Quote, and Order
Tracking	Standard entities except Communication and Solution

Pipeline charts: Hide stages with zero records

Feature ID: CRMS-738

Sage CRM provides a new option **Show stages with zero records**, enabling users and system administrators to hide the stages of a rectangular pipeline that don't include any records. This new option controls the cases pipeline, leads pipeline, and opportunities pipeline. By default, **Show stages with zero records** is set to **Yes**.

Previously, a rectangular pipeline always showed pipeline stages with zero records.

> **Note: Show stages with zero records** is available only if a system administrator has set **Pipeline chart style** to **Rectangle** in **| Administration | System | System Behavior**.

To use this new option:

- Users should go to **| Preferences**.
- System administrators should go to **| Administration | Users | <user> | User Preferences**.

Narrative enhancements

We have implemented the following enhancements for the **Narrative** tab displayed for companies:

- **Localization**. The **Narrative** tab is now translated into German, Spanish, and French. To display the tab in the language you want, install Sage CRM using the Setup package for that language.
- **View case stage**. The **Narrative** tab displays the current stage for each mentioned case.
- **Bug fixes**. The following issues have been fixed on the **Narrative** tab:
  - When a company team had two or more members, a hyperlink to the **Company Team** tab was missing from the description under **Company**.
  - Minor formatting and syntax issues.

Addressed issues

The following is a list of customer cases addressed in this release.

Issue ID	Area	Description	Status
CRMS-694	Cases, Workflow	In some scenarios, a workflow that created a Communication (for example, sent an email about a raised case to several users) added more than one record into the Communication database table for that Communication. The expected result is that each Communication should have only one record in the Communication database table. If an email was sent to several users, the workflow should create multiple records in the Comm_Link database table and link them to the single record in the Communication table.	Fixed
CRMS-1435	Cases, Workflow	In some scenarios, a field value set by a workflow action was unexpectedly truncated to 10 characters. This issue occurred when a workflow action was configured to reset a value in a column and replace it with the value from a field whose **Attribute** was set to **Hidden**.	Fixed
CRMS-1409	Companies, People	When a user opened a Company that had no default Person assigned, the contact information for the Company was empty.	Fixed

<table>
<tr><th>Issue ID</th><th>Area</th><th>Description</th><th>Status</th></tr>
<tr><td>CRMS-1405,
CRMS-1418</td><td>Companies,
People</td><td>When you edited a Company record that didn’t have a primary contact assigned, the following error occurred: “An unexpected event has occurred: Exception: Error – Record not found, you may not have security permissions.”</td><td>Fixed</td></tr>
<tr><td>CRMS-1370,
CRMS-1368</td><td>Core product</td><td>When using Google Chrome version 113.0.5682.64, every time you selected a clickable user interface element in Sage CRM, a Leave site? pop-up message appeared.</td><td>Fixed</td></tr>
<tr><td>CRMS-915</td><td>Customization</td><td>In some scenarios, a report provided the wrong ID of a custom entity record. For example, this issue occurred when you completed the following steps:
1. Created a custom entity that had Company, Person, Communication, and Library.
2. Made sure that the ID column in the custom_edits table for the custom entity was not marked as system.
3. Changed the caption and name for the field representing the ID of your custom entity.
4. Added a new view containing a view script like the following:<pre><code>SELECT * FROM
SALESANDBOOKING
LEFT OUTER JOIN
Communication ON
SalesAndBooking.SaBo_
SalesAndBookingId =
Communication.Comm_
SalesAndBookingId WHERE
SalesAndBooking.SaBo_
Deleted IS NULL AND
Communication.Comm_Deleted
IS NULL</code></pre></td><td>Fixed</td></tr>
</table>

Issue ID	Area	Description	Status
		Where the fields containing `SalesAndBookingId` represented your custom entity. 5. Created a new Person record not linked to a Company. 6. Created a list report containing the ID field of the custom entity, with auto hyperlinking enabled. As a result, when you ran the report and selected the ID of a custom entity record there, the wrong custom entity record opened.	
CRMS-742	Customization	The options available under **Desktop HTML list contents** were different in situations where they should be identical. This issue occurred when you did the following: 1. Went to **| Administration | Customization | Company | Lists**, selected **Inline customization**, and then selected the **Customize** icon beside Company Grid. 2. Observed the options under **Desktop HTML list contents**. 3. In Quick Find, selected the down arrow, selected **Company**, selected **Find**, and then selected **Customize List**. 4. Observed the options under **Desktop HTML list contents**. The options displayed in steps 1 and 2 were different, whereas they should be identical.	Fixed
CRMS-1424	Customization,	It was not possible to add Lead fields	Fixed

Issue ID	Area	Description	Status
	Leads	to the Lead grid because no Lead fields were available. In particular, this issue occurred when a system administrator performed these steps: 1. In **| Administration | Customization | Lead | Lists**, selected . 2. Tried to select a Lead field from the **Field** list. As a result, the Lead fields were missing from the **Field** list.	
CRMS-1454	Customization, Leads, Opportunities	It was not possible to customize the Opportunity grid because no Opportunity fields were available. In particular, this issue occurred when a system administrator performed these steps: 1. In **| Administration | Customization | Opportunity | Lists**, selected . 2. Tried to select an item from the **Field** list. As a result, the **Field** list was empty.	Fixed
CRMS-1372	Dashboard	The filter options (such as **Filter by**) were missing from the dashboard gadgets on which filters were supposed to be available. For example, this issue affected the My Open Opportunities gadget.	Fixed
CRMS-1460	Documentation	The documentation used the old name of Microsoft Entra ID: Azure Active Directory.	Fixed
CRMS-1884	Documentation	The instructions on how to configure OAuth 2.0 for Exchange Online used	Fixed

Issue ID	Area	Description	Status
		the old name of Microsoft Entra ID: Microsoft Azure Active Directory.	
CRMS-1378	Email	Sage CRM stopped responding when a user selected a workflow action that sent an email message containing an attachment. This issue affected only those users whose name contained non-English characters.	Fixed
CRMS-1414, CRMS-1472	Email	The **Font** and **Size** options were missing from the embedded email editor.	Fixed
CRMS-1089	Email	When a user forwarded an email using the embedded email editor, the aspect ratio of the images was lost and the images were distorted after the email arrived into the recipent's inbox.	Fixed
CRMS-1188	Email	When **Email Management Server Options** in **| Administration | Email and Documents** were configured to send an email to the system administrator when the CRM E-mail Manager service was started, the system administrator did not receive such an email.	Fixed
CRMS-1199	Email, OAuth 2.0	When an OAuth 2.0 token used to access an Outlook mailbox in Microsoft Office 365 expired, Sage CRM wrote the following misleading error to the log: "Exception connecting to Mail Server: Authentication failure: unknown user name or bad password."	Fixed The message written to theSage CRM log has been changed to describe the issue correctly.
CRMS-970	Lite Outlook plugin	After a user filed an email with an attachment whose name contained Chinese characters, these characters were replaced with blank spaces.	Fixed The Lite Outlook Plugin has been replaced with the Enhanced

Issue ID	Area	Description	Status
			Email Import feature in Sage CRM 2022 R2 and later. Use this feature to import emails containing attachments with Chinese characters. For more information, see **Importing contacts and email messages from Exchange Online**.
CRMS-1244	Mail merge	When a workflow action that ran a mail merge was configured to create a .docx document, it erroneously created a .doc document.	Fixed
CRMS-1447	Mail merge	When a user performed a mail merge and edited the merged file, the file was not attached to the target record in Sage CRM. This issue occurred only if a user did the following during mail merge: 1. Cleared the **Create communication** check box. 2. Selected the **View/Edit File** button and edited the merged file. 3. Browsed for and selected the edited file. 4. Selected **Upload File and Continue**.	Fixed

Issue ID	Area	Description	Status
CRMS-1043	Opportunities	When you viewed an Opportunity record, the top section of the record showed the details of a different Opportunity. This issue occurred in the following scenario: 1. You opened Opportunity A. 2. You used Quick Find to find and open Opportunity B. 3. You used the back button in your web browser to go back to Opportunity A.	Fixed
CRMS-1233	Opportunities	You encountered “An unexpected event has occurred” error when you did the following: 1. From the main menu, selected **Team CRM | Opportunities**, and then opened an Opportunity record. 2. Selected **Team CRM | Opportunities**, and then opened a different Opportunity. 3. Selected **Change**.	Fixed
CRMS-1384	Opportunities	When a user selected a stage in the Opportunity pipeline, several stages were selected.	Fixed
CRMS-1251	Opportunities	When a user selected an Opportunity in **Team CRM | Opportunities**, and then selected the **Orders** tab, no Orders were displayed.	Fixed
CRMS-1260	Opportunities	When a user opened an Opportunity in **Team CRM | Opportunities**, selected the **Orders** tab, and then selected the **Summary** tab, the following error occurred: "Cannot create quotes and orders	Fixed

Issue ID	Area	Description	Status
		because current opportunity has items."	
CRMS-1419	Opportunities	In some cases, the Opportunity pipeline showed the incorrect name of one or several stages and the wrong number of records in a stage. This issue occurred when a system administrator customized the Opportunity pipeline by adding new stages.	Fixed
CRMS-1361	Opportunities	When a user tried to edit an Opportunity by going to **Team CRM | Opportunities** and selecting an Opportunity, the following error was displayed: "An unexpected event has occurred: Exception: Error - Record not found, you may not have security permission."	Fixed
CRMS-1345	Opportunities	When a user tried to modify an Opportunity record, the following error displayed: “An unexpected event has occurred. Exception error – record not found, you may not have security permissions.” This issue occurred after the system administrator customized Sage CRM to add a field from the Opportunity database table to the Case Details screen.	Fixed
CRMS-1223	Opportunities, Quotes, Orders	In some scenarios, when you opened an Opportunity in **Team CRM | Opportunities**, and then selected the **Quotes** tab, the **New** button was missing and it wasn't possible to create a new Quote.	Fixed

Issue ID	Area	Description	Status
CRMS-1194	Opportunities, Workflow	After upgrading Sage CRM, an Opportunity-related workflow stopped working. For example, when a workflow was configured to assign a review team to a newly-created Opportunity, it did not happen.	Fixed
CRMS-868, CRMS-839	Quick find	A company name containing parentheses was displayed incorrectly in Quick Find. For example, the name part inside the parentheses was displayed as *undefined*.	Fixed
CRMS-1033	Self service	The following error occurred in the Self Service UI: “eWare.eWareBlockContainer error `<error code>`[SafeCall Exception]: Catastrophic failure”	Fixed
CRMS-1387	Web services	When a system administrator scanned their Sage CRM server using ManageEngine Vulnerability Manager Plus, they observed the following vulnerabilites caused by Tomcat 9.0 supplied with Sage CRM: • **CVE-2020-8022** • **CVE-2020-9484** • **CVE-2020-11996** • **CVE-2020-13934** • **CVE-2020-13935** • **CVE-2020-13943** • **CVE-2020-17527** • **CVE-2021-24122** • **CVE-2021-25329**	Fixed Tomcat supplied with Sage CRM has been updated to version 9.0.75, where these vulnerabilities are addressed.

Issue ID	Area	Description	Status
		• **CVE-2021-25122** • **CVE-2021-30639** • **CVE-2021-41079** • **CVE-2022-29885** • **CVE-2021-33037** • **CVE-2021-30640** • **CVE-2022-23181** • **CVE-2022-34305**	
CRMS-1300	Workflow	The following issue occurred when a system administrator edited a workflow in **| Administration | Advanced Customization | Workflow**: When the **Available Rules** list was long (30+ rules), it was not possible to drag a rule from the bottom of the list to the desired part of the workflow diagram, because the diagram wasn't scrollable.	Fixed

Discontinued features

- **Oracle Java Runtime Environment (JRE) 8**. We no longer supply this edition of JRE with Sage CRM, because now Oracle JRE 8 requires a commercial license for its redistribution. To make sure that all JRE-reliant features of Sage CRM continue to work as before, we have replaced Oracle JRE 8 with an open-source 32-bit JRE 8 that is available for download on the **adoptium.net** website and can be used free of charge. This replacement doesn't require any actions from you if you upgrade to Sage CRM 2023 R2 or install this version for the first time.

  If you wish to continue using a pre-2023 R2 Sage CRM version, you will need either to buy an Oracle JRE 8 license, or replace Oracle JRE 8 with an open-source JRE 8 manually in order to comply with the conditions of the Oracle JRE 8 commercial license. For detailed instructions and more information on the Oracle JRE 8 replacement, see the **Sage CRM blog on SageCity**.

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2023 R2 at the time of release.

Issue ID	Area	Description
CRMS-450 CRMS-595	Email	When you right-click a highlighted misspelled word in the built-in email editor, the shortcut menu that opens does not provide a list of suggestions to correct the word. This issue occurs in the Google Chrome, Microsoft Edge, and Mozilla Firebox web browsers and is caused by a third-party component called CKEditor. WORKAROUND 1 Hold down Ctrl and right-click the misspelled word to display a list of suggestions. WORKAROUND 2 Install and use a spellchecker extension for your web browser such as **LanguageTool**.
CRMS-430	RESTful API SData	In Postman, when you use wildcard characters (`%`) in a GET request to return specific records, you receive unexpected results. For example, the following request returns all companies instead of just the companies whose name contains *Gate*: `GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'` This issue is caused by the way Postman processes certain characters. In the past, Postman provided a setting named **Use next generation URL processing**. By disabling this

Issue ID	Area	Description
		setting, you could make the wildcard characters work. However, this setting has been discontinued in the recent Postman releases. WORKAROUND 1 Use URL encoding (`%25`) to encode the wildcard characters (`%`) in your request, for example: `GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%25Gate%25'` WORKAROUND 2 Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.
N/A	RESTful API	When using the RESTful API, you may observe the following issues. Issue 1: Even though your request sent to the RESTful API uses the HTTPS protocol, the URLs of records returned by the API use HTTP. Issue 2: The base URL of the records returned by the API may be different from the one you used in your request. For example, the base URL in your request may contain the fully qualified domain name (FQDN) of the Sage CRM server but the base URL of the returned records has the local server name instead. REASON Issue 1: This is by design. The RESTful API always uses HTTP in the URLs of returned records. Issue 2: To form the URLs of returned records, the RESTful API uses the server name stored the `Parm_Value` column of the `Custom_SysParams` database table. However, this column can store several names for your Sage CRM server, for example, its local name and FQDN separated by a semicolon: `myserver;myservername.mydomain.com` The RESTful API always uses the first server name stored in this column. WORKAROUND FOR ISSUE 2

Issue ID	Area	Description

		Change the order of the server names stored in the `Parm_Value` column of the Sage CRM database, so that the FQDN of your server comes first.
		1. See the server names stored in the `Parm_Value` column:
		`SELECT Parm_Value from Custom_SysParams where Parm_Name='ServerNames'`
		2. Back up the Sage CRM database.
		3. Run a SQL query to change the order of the server names, for example:
		`UPDATE Custom_SysParams SET Parm_Value = 'myservername.mydomain.com;myserver' WHERE Parm_Name = 'ServerNames'`

CRMS-151	User interface	When the **Details** field of an entity contains a long value (255+ characters) without spaces, line breaks, or dashes, the value isn't wrapped to fit in the field. For example, this issue occurs in the **Lead_detail** field. This limitation is by design and will not be fixed. WORKAROUND You can fit a long value in the field by displaying only the first 255 characters of the value. To do so, put the **Details** field in a List block. This doesn't change the actual value stored in the SQL Server database.
CRMS-714	Email	When you use the built-in email editor to insert an inline image into the email body by selecting **Paste** in a shortcut menu, a message appears stating that your web browser does not support this functionality and that you should use the Ctrl+V keys instead. But pressing the Ctrl+V keys also fails to insert the image. WORKAROUND To add an inline image: 1. Below the email editor box, browse for and select a local image file. 2. Select **Upload inline image**.

Open-source components

Sage CRM 2023 R2 installs the following open-source components:

Component	Legal information
Apache Solr 6.1	© 2023 The Apache Software Foundation Apache License, Version 2.0 **https://www.apache.org/licenses/LICENSE-2.0**. Source code: **https://archive.apache.org/dist/lucene/solr/6.1.0/**
Apache Tomcat 9.0	© 2023 The Apache Software Foundation Apache License, Version 2.0 **https://www.apache.org/licenses/LICENSE-2.0**. Source code: **https://tomcat.apache.org/download-90.cgi**
Eclipse Temurin Java Runtime Environment 8 based upon OpenJDK	© Eclipse Foundation GNU General Public License, version 2 **https://www.gnu.org/licenses/old-licenses/gpl-2.0.en.html** Source code: **https://adoptium.net/en-GB/temurin/releases/?os=windows&arch=x86&package=jre&version=8**