

# 2023 R2.1 Patch ReadMe

**Updated:** 07 December 2023

This patch is applicable to Sage CRM 2023 R1.

## Addressed issues

Internal issue ID	External issue ID	Area	Description	Status
CRM-1992	CRMS-1527	Opportunities	<p>When a user selected a company in an opportunity, the wrong company was opened.</p> <p>This happened when a user completed the following steps:</p> <ol style="list-style-type: none"> <li>1. In Quick Find, selected <b>Opportunity</b>.</li> <li>2. In <b>Keyword search</b>, entered a company name and selected <b>Find</b>.</li> <li>3. In the list of search results, selected a company name.</li> <li>4. On the <b>Relationships</b> tab, selected a sibling company.</li> </ol> <p>As a result, the wrong company opened.</p>	Fixed
CRM-1981	CRMS-1513	Opportunities	<p>The wrong company opened when a user did the following:</p> <ol style="list-style-type: none"> <li>1. Selected <b>Team CRM   Opportunities</b>.</li> <li>2. In the list of opportunities,</li> </ol>	Fixed

Internal issue ID	External issue ID	Area	Description	Status
			<p>selected a company name to open that company.</p> <ol style="list-style-type: none"> <li>3. Selected <b>Team CRM   Opportunities</b> once more.</li> <li>4. In the list of opportunities, selected a different company name.</li> </ol> <p>As a result, the company that user previously selected in step 2 opened.</p>	
CRM-1950	CRMS-1499	Companies, People, Deduplication	<p>With deduplication enabled, the wrong company opened when a user did the following:</p> <ol style="list-style-type: none"> <li>1. Edited a company and saved the changes.</li> <li>2. Selected <b>+   New Company</b>.</li> <li>3. Entered the name of an existing company.</li> <li>4. In the warning that opened, selected the company link.</li> </ol> <p>As a result, the company that user edited in step 1 opened.</p>	Fixed
CRM-1927	CRMS-1481	Opportunities, Quotes, Orders	<p>Sage CRM associated a quote with the wrong opportunity when a user did the following:</p> <ol style="list-style-type: none"> <li>1. Opened a company and selected <b>+   New Quote</b>.</li> <li>2. Filled in <b>Description</b> and selected <b>Next</b>.</li> <li>3. In the top left part of the screen, selected the company link beside <b>Company</b>.</li> </ol>	Fixed

Internal issue ID	External issue ID	Area	Description	Status
			<p>4. Selected +   <b>New Quote</b>.</p> <p>5. Filled in <b>Description</b> (the value should be different from the one you entered in step 2) and selected <b>Next</b>.</p> <p>As a result, the quote created in step 5 was linked to the wrong opportunity.</p>	
CRM-1556	CRMS-1293	Calendar, Calendar list	The text entered in the <b>Details</b> field of an appointment was not wrapped properly: it was formatted as a single long line.	Fixed
CRM-1132	CRMS-1037	Security management	<p>It was not possible to configure security profilesto implement this scenario:</p> <ul style="list-style-type: none"> <li>• A user can create communications for themselves and view those communications.</li> <li>• A user can create communication for other users in their home territory but cannot view those communications.</li> </ul> <p>Configuring the Communication column in the security profiles as follows did not yield the desired result:</p> <ul style="list-style-type: none"> <li>• Assigned to: View, Edit</li> <li>• User's home territory: Insert</li> </ul>	Fixed
CRM-2027	CRMS-1561	Companies, People	<p>The following issues showed up when Sage CRM was integrated with Sage 300.</p> <p>ISSUE 1</p>	Fixed

Internal issue ID	External issue ID	Area	Description	Status
			<p>When a user selected an existing customer, a SQL error occurred.</p> <p>ISSUE 2</p> <p>When a user tried to enter a quote or order for an opportunity, the following error displayed: “An error has occurred in a CRM .NET customization. Please contact your vendor to resolve.”</p>	
CRM-2081	CRMS-1596	General issue	When a user created a new parent relationship on the Relationships tab of a company, saved the changes, and then selected the parent company link, the wrong company opened.	Fixed
CRM-2062	CRMS-1587	Web Services	The Web Services WSDL file was inaccessible at the link provided in the <i>Using the WSDL file</i> topic in the <i>Developer Help</i> .	Fixed

## Steps to apply this patch

1. On your Sage CRM server, run the provided **SageCRM2023R2.1.exe** file.
2. Complete the Setup Wizard.