Sage CRM 2024 R1
Release Notes

Updated: 03 May 2024

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 2024 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 2024 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 2024 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	eWare.dll version
April 2024	20.24.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2024 R1.

For more information about the software with which Sage CRM 2024 R1 can work and integrate, see the *2024 R1 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 2024 R1 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 2024 R1 installation package to upgrade from versions 2023 R2, 2023 R1, 2022 R2, 2022 R1, 2021 R2, 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 2024 R1 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 2024 R1. 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 2024 R1 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 2024 R1 System Administrator Help* published on the **Sage CRM Help Center**.

New features and enhancements

Sage CRM 2024 R1 provides the following new features and enhancements:

- **Sort favorites**
- **Prevent external URLs in website gadgets**
- **Apply formatting to text fields**
- **Use tags to classify records**
- **Support for 64-bit Java Runtime Environment**

Sort favorites

Feature ID: CRMS-769

You can use a new option **Sort favorites** in the user preferences to sort the entries in the Favorites list (). **Sort favorites** can take one of the following values:

- **A to Z**. Sorts entries by the first word in their name, with entries that begin with an A on top.
- **Oldest to newest** (default). Sorts entries by the date when they were added to the Favorites list, with the oldest entries on top.

To configure this new option:

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

Prevent external URLs in website gadgets

A new checkbox **Allow external URLs in website gadgets** in the system behavior settings allows system administrators to enable or disable external URLs in the website gadgets.

Allowing external URLs makes Sage CRM less secure, because users can be potentially redirected to a malicious URL.

Clear this checkbox to tighten Sage CRM security, disable external URLs, and prevent users from being redirected to a malicious URL.

When **Allow external URLs in website gadgets** is cleared (default), the website gadgets can only contain static URLs that begin with `#crm_server#`. This guarantees that a URL can only reference a file located on the Sage CRM server, for example:

```
#crm_server#/StaticContent/<HTML File Name>
```

To access this new checkbox, go to **| Administration | System | System Behavior | Allow external URLs in website gadgets**.

> **Warning:** Because **Allow external URLs in website gadgets** is cleared by default, after you upgrade to Sage CRM 2024 R1, all external URLs in your website gadgets will stop working.

Apply formatting to text fields

Users can format the values of multiline text fields, for example the **Problem details** and **Solution details** fields of a Case record, by applying the following HTML tags:

HTML tag	Examples
 Formats text as bold.	This is bold text Result: This is **bold** text This is mixed bold and <i>italic</i> text Result: This is mixed **bold and *italic*** text.
<i> Formats text as italic.	This is <i>italic</i> text Result: This is *italic* text This is mixed <i>italic and bold</i> text Result: This is mixed *italic and **bold*** text

<table>
<tr><th>HTML tag</th><th>Examples</th></tr>
<tr><td>

Inserts a line break.</td><td>

```
This is a simple <br>line break
```

Result:
This is a simple
line break

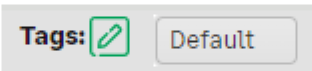
```
This is <i>italic text with a <br>line break</i>
```

Result:
This is *italic text with a*
line break
</td></tr>
</table>

Use tags to classify records

A tag is a label a user can add to records in Sage CRM to classify them. Tags in Sage CRM work similarly to hashtags in some social networks. For example, a user can create a group that includes records with the same tag or generate a report on such records. Tags are displayed in the user interface by default and available on case, company, lead, quote, order, opportunity, person, and solution records.

To work with tags, open a record and use the **Tags** element in the top left corner of the record:



This element is available only if a system administrator chose to display it in the user interface. It lists the tags that are already added to the record, if any. The example above shows a **Default** tag.

To start managing tags, select the **Add/remove tags** () button. Then, use the text box to create a new or select an existing tag and add it to the record. Tags are global and visible to all users who have permissions to view the record. As a user, you can remove the tags that were added to a record by you or any other user.

As a system administrator, you can perform the following tasks related to tags:

- **Show or hide tags in user interface**
- **View and delete tags created by users**

A user can do the following:

- **Add tag to record**
- **Remove tag from record**
- **Scenario: Configure report to show persons with same tag**
- **Scenario: Configure group to include companies with same tag**

Show or hide tags in user interface

System administrators can show or hide the **Tags** element in the user interface.

1. Select **| Administration | System | System Behavior**.
2. Select **Change**.

3. Locate **Show tags** and select one of the following:
    - **Yes** *default*. Displays the **Tags** element on the entities that support tags. This element enables the users to add and remove tags.
    - **No**. Hides the **Tags** element on the entities that support tags, but keeps the existing tags in the system. Hiding the **Tags** element prevents the users from adding or removing tags. Hiding **Tags** does not affect the reports and groups that use existing tags - they continue to work as before.
4. Select **Save**.

View and delete tags created by users

System administrators can use the Key Attribute Profiling feature to view and delete the tags created by users through the Sage CRM user interface.

Whenever a user creates a new tag in the Sage CRM UI, that tag is added as a key attribute to the list of attributes named **ProjectTaggingList**. The tag and the corresponding key attribute have the same name.

To view all tags created by users:

1. Go to **| Administration | Advanced Customization | Key Attributes**.
2. Select the **Key Attribute Lists** tab.
3. Under **List**, select **ProjectTaggingList**.

    The tags are listed as key attributes under **Entries currently in key attribute list ProjectTaggingList**.

    > **Warning:** Do not delete **ProjectTaggingList**. If you do so, the Tags feature stops working.

To delete a tag, complete the below steps.

> **Warning:** When you delete a tag, it is removed from the Sage CRM UI and all the records to which it is assigned. As a result, these records no longer display in the groups and reports that use the deleted tag.

1. Select the tag (key attribute) you want to delete under **Entries currently in key attribute list ProjectTaggingList**.
2. Select **Change**.
3. Under **Selection**, select the tag you want to delete.
4. Select **Delete**, and then select **Save**.

Add tag to record

As a user, you can complete the following steps to add a tag to a record:

1. Open the record to which you want to add a tag.

   This can be a case, company, lead, quote, order, opportunity, person, or solution.

2. Beside **Tags**, select the **Add/remove tags** button ().

3. Do one of the following:

   - To select and add an existing tag, click in the text box, and then select a tag from the list. The list includes the tags created by you and other Sage CRM users.

   - To create a new tag and add it to the record, type the tag name in the text box, and then select **Create tag**.

     The name of a tag cannot exceed 32 characters. Tag names are case insensitive. That is, Sage CRM treats **My-tag** and **my-tag** as the same tag. We recommend that you do not exceed 10 tags per record.

     Note: The **Create tag** button doesn't display when you try to create a tag containing the initial characters of an existing tag. To display **Create tag**, add one or several spaces at the end of the new tag name.
     If there's a tag **example**, but you want to create a tag **ex**, type **ex** and add a single space after that.
     If there's a tag **my category**, but you want to create a tag **my**, type **my** and add two spaces after that.
     Sage CRM automatically removes spaces appended to a tag name.

     The name of a tag can contain the following characters only:

Character	Name
a-z A-Z	alphabetic characters
&	ampersand
*	asterisk
@	at sign
\	backslash

<table>
<tr><th>Character</th><th>Name</th></tr>
<tr><td></td><td>blank space</td></tr>
<tr><td>{ }</td><td>braces</td></tr>
<tr><td>[ ]</td><td>brackets</td></tr>
<tr><td>^</td><td>caret</td></tr>
<tr><td>:</td><td>colon</td></tr>
<tr><td>,</td><td>comma</td></tr>
<tr><td>$</td><td>dollar sign</td></tr>
<tr><td>=</td><td>equal sign</td></tr>
<tr><td>!</td><td>exclamation point</td></tr>
<tr><td>`</td><td>grave accent</td></tr>
<tr><td>></td><td>greater than sign</td></tr>
<tr><td><</td><td>less than sign</td></tr>
<tr><td>-</td><td>minus sign</td></tr>
<tr><td>0-9</td><td>numeric characters</td></tr>
<tr><td>( )</td><td>parentheses</td></tr>
<tr><td>%</td><td>percent</td></tr>
<tr><td>.</td><td>period</td></tr>
<tr><td>|</td><td>pipe</td></tr>
<tr><td>+</td><td>plus sign</td></tr>
<tr><td>#</td><td>pound sign</td></tr>
<tr><td>?</td><td>question mark</td></tr>
<tr><td>;</td><td>semicolon</td></tr>
<tr><td>'</td><td>single quotation mark</td></tr>
</table>

Character	Name
/	slash
"	straight quotation mark
~	tilde
_	underscore

Remove tag from record

As a user, you can remove the tags that were added to a record by you or any other user.

1. Open the record from which you want to remove tags.
2. Beside **Tags**, select the **Add/remove tags** button ().
3. Do one of the following:
   - To remove a single tag, select the cross icon (**x**) on the tag.
   - To remove all tags, select the cross icon (**x**) on the right-hand side of the text box.

When a user removes a tag from a record, the tag remains in the system and can be reused if necessary. Only system administrators can completely delete a tag from Sage CRM.

Scenario: Configure report to show persons with same tag

To complete the steps in this scenario, you must have permissions to create and run reports. Ask your system administrator for details.

In this scenario, you create a new tag, assign it to two persons, and then create a report that shows information about the persons with this tag. Every new person to which you assign the tag is also included in the report.

This example scenario requires demo data to be installed in Sage CRM. Ask your system administrator for more information.

1. Create a tag and add it to a person named Aaron Mines:
   a. Use the **Search** box in the top right corner to find and open a person named **Aaron Mines**.
   b. Beside **Tags**, select **Add/remove tags** ().
   c. In the text box, type **my-persons** and select **Create tag**.
2. Add **my-persons** tag to a person named **Adam Young**:

a. Use the **Search** box to find and open a person named **Adam Young**.

b. Beside **Tags**, select **Add/remove tags** ().

c. Click in the text box and select **my-persons** tag you created earlier.

3. Create a report on the persons labeled with **my-persons** tag:

    a. From the main menu, select **Reports | General**.

    b. Select **New** and fill in the following fields. Keep the default values of all other fields.

    - **Name**. Enter **Report on persons**.
    - **Source view**. Select **Person Summary**.

4. Add your tag to search criteria:

    a. Select **Add Key Attribute Data**.

    b. Under **Select column**, select **Project**.

    c. Under **Select field**, select **Tag Name**.

    d. Under **Select entity**, select **Person**.

    e. Select **Add to Search Criteria**.
    Make sure that **Search criteria** includes **Person: Tag Name**.
    Select **Continue**.

5. Add person's last name to the report contents:

    a. Under **Select column**, select **Person: Last name**.

    b. Select **Add to Report Contents**.

    c. Select **Continue**.

6. On the **Search criteria for report** step, select **my-persons** from the list.
Select **Continue**, and then select **Save**.

7. Run the report:

    a. From the main menu, select **Reports | General**.

    b. Beside **Report on persons**, select the run icon (), and then select **Go**.

As a result, the report lists two persons you labeled with **my-persons** tag. Any other persons to which you add this tag in the future are also added to the report.

Scenario: Configure group to include companies with same tag

To complete the steps in this scenario, you must have permissions to create groups. Ask your system administrator for details.

In this scenario, you create a new tag, assign it to two companies, and then create a dynamic group that includes the companies with this tag. Every new company to which you assign the tag is also included in the dynamic group.

This example scenario requires demo data to be installed in Sage CRM. Ask your system administrator for more information.

1. Create a tag and add it to the 3G Homes company:
   a. Use the **Search** box in the top right corner to find and open the **3G Homes** company.
   b. Beside **Tags**, select **Add/remove tags** ().
   c. In the text box, type **my-companies** and select **Create tag**.
2. Add the my-companies tag to the Eurolandia company:
   a. Use the **Search** box to find and open the **Eurolandia** company.
   b. Beside **Tags**, select **Add/remove tags** ().
   c. Click in the text box and select the **my-companies** tag you created earlier.
3. Create a dynamic group to include companies labeled with the my-companies tag:
   a. From the main menu, select **My CRM | Groups**.
   b. Select **New Group**, fill in the following fields, and select **Continue**:
      - **Name**. Enter **My group**.
      - **Type**. Select **Dynamic Group**.
      - **Entity**. Select **Company**.
      - **Source view**. Select **Company Search**.
4. Add your tag to search criteria:
   a. Select **Add Key Attribute Data**.
   b. Under **Select column**, select **Project**.
   c. Under **Select field**, select **Tag Name**.
   d. Under **Select entity**, select **Company**.

e. Select **Add to Search Criteria**.
   Make sure that **Search criteria** includes **Company : Tag Name**.
   Select **Continue**, and then select **Continue** again.
f. Under **Search criteria for list**, select **my-companies**.
   Select **Continue**, and then select **Save**.

5. Open the created group:

   a. Go to **My CRM | Groups**.
   b. Select **My group**.

      This group includes two companies you labeled with **my-companies** tag. Any other companies to which you add this tag in the future are automatically included in the group.

Support for 64-bit Java Runtime Environment

All Sage CRM components now support 64-bit JRE out of the box. If 64-bit JRE is not installed on the server where you deploy Sage CRM, the Sage CRM Setup installs it automatically.

Because of this change, we have removed instructions on how to manually switch to 64-bit JRE from the 2024 R1 Administrator Help.

Addressed issues

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

Issue ID	Area	Description	Status
CRMS-1293	Calendar, Calendar list	The text entered in the **Details** field of an appointment was not wrapped properly: It was formatted as a single long line, even though it contained line breaks.	Fixed
CRMS-1303 CRMS-1533	Cases, Document drop	When a user tried to attach a file to a case by dragging the file to the **Drop files here to attach** area, an "Access is denied" error occurred.	Fixed
CRMS-1561	Companies, People	The following issues showed up when Sage CRM was integrated with Sage 300. ISSUE 1 When a user selected an existing customer, a SQL error occurred. ISSUE 2 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.”	Fixed

Issue ID	Area	Description	Status
CRMS-976	Companies, People	A long value of a multiline text field failed to wrap correctly. The value was displayed on a single line with a scroll bar displayed under the multiline text field. The expected behavior is that such values should automatically wrap to fit into the text field.	Fixed
CRMS-1499	Companies, People, Deduplication	With deduplication enabled, the wrong company opened when a user did the following: 1. Edited a company and saved the changes. 2. Selected **| New Company**. 3. Entered the name of an existing company. 4. In the warning that opened, selected the company link. As a result, the company that user edited in step 1 opened.	Fixed
CRMS-1660	Companies, People, Reports	When a user generated a report that had the **Auto hyperlinking** option enabled and then selected a company in the generated report, the wrong company opened in Sage CRM.	Fixed
CRMS-1596	Companies/people	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

Issue ID	Area	Description	Status
CRMS-1510	Core product	The wrong company opened when a user did the following: 1. From the main menu, selected **Team CRM | Cases**, and then selected a company. 2. Selected **Team CRM | Cases** again, and then selected a different company. As a result, Sage CRM displayed the details of the company the user opened in step 1.	Fixed
CRMS-397	Core product, Calendar, Calendar list	When a user opened the calendar or calendar list, an additional sign-in dialog opened, prompting the user to enter their user name and password.	Fixed
CRMS-948	Customization	When a user selected a custom entity record from the Recent list ( ), the Sage CRM window briefly displayed the following text at the top left: "; charset=utf-8>	Fixed
CRMS-860	Customization	Detached table-level scripts failed to run.	By design. Detached table-level scripts are deprecated and will be removed in Sage CRM 2024 R2.
CRMS-1552	Customization	The field **Default targets for normal priority reminder messages** was displayed twice in the **Reminder Preferences** area in **| Preferences**.	Fixed

Issue ID	Area	Description	Status
CRMS-1610	Customization, Opportunities	When a system administrator edited the opportunity grid in **| Administration | Customization | Opportunity | Lists | Opportunity Grid**, some fields were missing from the **Field** drop-down list.	Fixed
CRMS-981 CRMS-1351	Dashboard	A dashboard gadget of type **Main Menu Item** failed to work when it was configured as follows: • **Action Type** was set to **URL** • **Action** contained a URL. or • **Action Type** was set to **CRM** • **Action** contained a custom entity based on ASP. As a result, the gadget returned an error.	Fixed
CRMS-1599	Dashboard	In some situations, a dashboard gadget returned the error: "An error occurred when attempting to process the gadget. Please contact your system administrator." In particular, this issue occurred when you changed a custom caption for the entity the gadget was for.	Fixed
CRMS-1429 CRMS-1521	Data upload	The **Match Rules** option was missing from **| Administration | Data Management**.	Fixed The fix enables **deduplication** on new installations by default.

Issue ID	Area	Description	Status
CRMS-1239	Database	The maximum length of the **acty_ method** database table column was limited to 100 characters. As a result, the information about the browser version and type stored in the column was truncated.	Fixed
CRMS-1611, CRMS-1627	Document drop	An error occurred in the following scenario: 1. A user uploaded a file whose name contained an ampersand (&). 2. A user tried to open the uploaded file.	Fixed
CRMS-1056	Document drop	When a user tried to attach a file whose name contained a percent (%) and/or an ampersand (&) to a task, an "Unable to upload file" error occurred. This issue showed up when a user tried to attach a file using the **Add File** button or the **Drop files here to attach them** area.	Fixed
CRMS-807	Documentation	The **Help** button on the **| Administration | Advanced Customization | Tables and Databases** screen opened the Welcome page in help instead of the related help topic.	Fixed
CRMS-1503	Documentation, Mail merge, Opportunities	When a user performed a nested mail merge for an Opportunity record and used the **TableStart** and **TableEnd** merge fields as prescribed in the documentation, the merge failed to work.	Fixed

Issue ID	Area	Description	Status
CRMS-843	Email, OAuth 2.0	When a system administrator configured OAuth 2.0 for a mailbox in Email Management without populating the **SMTP user name** field in the Sage CRM UI, the following error was written to the Sage CRM log file: "SMTP: Could not send message. This may be due to AUTH not being supported by the MTA, no supported authentication methods being available, or an incorrect username/password."	Fixed The description of the **SMTP user name** field in the *System Administrator Help* has been updated.
CRMS-1602	Export data	When a user selected the **Export to File** button, the list of target file formats in the **Export file options** area contained unsupported file formats, such as log files.	Fixed
CRMS-1632	Export data, Users, Groups	The following issues occurred when exporting a group containing person records to a .csv or .txt file. ISSUE 1 A column containing person ID was unexpectedly added as the first column to the target file. ISSUE 2 The column containing territory was missing from the target file, although the column was present in the group. ISSUE 3 When you added a new column to the group and then exported the group, the new column was missing from the target file. Also in some situations a column you removed from the group was unexpectedly present in the target file.	Fixed

Issue ID	Area	Description	Status
CRMS-1187	Forecasts	When the **Forecast** field of an opportunity was set as required, it was possible to leave this field blank when creating a new opportunity.	Fixed
CRMS-1554	Import contacts and emails	To enable the import of contacts and emails from Exchange Online, users had to connect to their Exchange Online account by opening a web browser on the Sage CRM server and entering a URL starting with **https://localhost** .	Fixed
CRMS-1537	Leads	When a user tried to edit a lead whose **Description** value exceeded 40 characters, an error occurred.	Fixed
CRMS-1530 CRMS-1592	Mail merge, Document drop	Changes made to a document template were not saved. This issue occurred when a user did the following: 1. Selected the **View/edit** button for a document template. 2. Edited the template and saved the changes 3. Uploaded the changed template to Sage CRM. When the user opened the changed template in Sage CRM, the changes were missing from the template.	Fixed

Issue ID	Area	Description	Status
CRMS-1527	Opportunities	When a user selected a company in an opportunity, the wrong company was opened. This happened when a user completed the following steps: 1. In Quick Find, selected **Opportunity**. 2. In **Keyword search**, entered a company name and selected **Find**. 3. In the list of search results, selected a company name. 4. On the **Relationships** tab, selected a sibling company. As a result, the wrong company opened.	Fixed
CRMS-1513	Opportunities	The wrong company opened when a user did the following: 1. Selected **Team CRM | Opportunities**. 2. In the list of opportunities, selected a company name to open that company. 3. Selected **Team CRM | Opportunities** once more. 4. In the list of opportunities, selected a different company name. As a result, the company that user previously selected in step 2 opened.	Fixed

Issue ID	Area	Description	Status
CRMS-1481	Opportunities, Quotes, Orders	Sage CRM associated a quote with the wrong opportunity when a user did the following: 1. Opened a company and selected **| New Quote**. 2. Filled in **Description** and selected **Next**. 3. In the top left part of the screen, selected the company link beside **Company**. 4. Selected **| New Quote**. 5. Filled in **Description** (the value should be different from the one entered in step 2) and selected **Next**. As a result, the quote created in step 5 was linked to the wrong opportunity.	Fixed
CRMS-1514	Quotes, Orders	When a user created a new order by selecting **| New Order**, the drop-down list under the **Billing address** field unexpectedly included entries mentioning various log files such as **Tomcat CRM Log**, **Hibernate Framework Log**, and so on.	Fixed
CRMS-1613	Reports	When you exported a report to an .xslx file, some columns were missing from the target file.	Fixed
CRMS-729	REST API	When a `GET` request contained an `orderby` option set to `asc` or `desc`, the returned records were sorted in the wrong order.	Fixed

Issue ID	Area	Description	Status
CRMS-1037	Security management	A user was unable to view any communications when their security for communications was configured as follows: • Assigned to: View, Edit • User's home territory: Insert	Fixed
CRMS-1587	Web Services	The Web Services WSDL file was inaccessible at the link provided in the "Using the WSDL file" topic in the *Developer Help*.	Fixed
CRMS-1691	Web Services	An error occurred when accessing the webservices.wsdl file located at http://{FQDN or ID address of server}/crm/eware.dll/webservices/webservice.wsdl	Fixed
CRMS-1668	Workflow	A workflow action failed to work. For example, a workflow action that was supposed to select a value from a list didn't do that.	Fixed

Deprecated features

- **Detached table-level scripts**. **This feature** is deprecated and will be removed in Sage CRM 2024 R2. If you are using detached table-level scripts, migrate them to escalation rules. For details see **Advisory: Detached Table Level Scripts to be deprecated in Sage CRM 2024 R1** on the **Sage Community Hub**.
- **All themes except Contemporary**. We have deprecated all Sage CRM themes except Contemporary.

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2024 R1 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-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 Below the email editor box, browse for and select a local image file. Select **Upload inline image**.

Issue ID	Area	Description

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
		
		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'`

Issue ID	Area	Description

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 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	Tags	When you select the cross icon (**x**) on a tag to remove it from a record, in some browsers the tag name may disappear from the list before you confirm its removal in the dialog that opens. WORKAROUND Ignore this behavior. A tag is not removed until you confirm its removal.

Issue ID	Area	Description
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.

Open-source components

Sage CRM 2024 R1 installs the following open-source components:

Component	Legal information
Apache Solr 8.11.2	© 2024 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/8.11.2/**
Apache Tomcat 9.0	© 2024 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**