



Sage CRM 2026 R1 Release Notes

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Overview

This document provides information about the new features and enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 2026 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 2026 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.

Release date and files included

| Release date | eWare.dll version |
|---------------------|--------------------------|
| March 2026 | 20.26.0.1 |

Documentation and help

For more information about the software with which Sage CRM 2026 R1 can work and integrate, see the *2026 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](#)
- [Upgrade path](#)
- [Post-installation/upgrade tasks](#)
- [Supported themes](#)

Installation prerequisites

Before installing or upgrading Sage CRM, make sure that:

- Your environment meets the *Sage CRM 2026 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 2026 R1 installation package to upgrade from versions 2025 R2, 2025 R1, 2024 R2, 2024 R1, 2023 R2, 2023 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 version of Sage CRM, upgrading to 2026 R1 completely removes CTI.
- The **File extension restrictions** blacklist 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 2026 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 2026 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).

- Sage CRM 2026 R1 makes changes to the automatically added Mailchimp merge tags. If you have Mailchimp Integration enabled, after upgrading Sage CRM you may need to perform some manual actions. For details, see [Changes to Mailchimp merge tags](#).
- 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 System Administrator Help* published on the [Sage CRM Help Center](#).

New features and enhancements

Sage CRM 2026 R1 provides the following new features and enhancements:

- **Enhanced Application Server Security**
- **Enhanced Reporting**
- **Exchange Integration Updates**
- **Security Enhancements**
- **Support for Microsoft SQL Server 2025**
- **Upgraded PDF Generation Engine**

Addressed issues

The following customer issues are addressed in this release

| Issue ID | Area | Description | Status |
|-----------|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| CRMS-1978 | Calendar, Calendar List | When a user checked Show overdue tasks , navigated to another screen and then returned to the Calendar, Show overdue tasks was unchecked | Fixed |
| CRMS-2267 | Calendar, Calendar List | The following error occurred when a user attempted to Add a Quick Task: “The resource cannot be processed. Comm_Action - Error - Invalid data. comm_secterr - Error - Invalid data.” | Fixed |
| CRMS-2269 | Communications | An EaccessViolation error occurred when a user attempted to create a communication | Fixed |
| CRMS-1851 | Companies | An error occurred when a user attempted to add an email address containing an apostrophe (') | Fixed |
| CRMS-1304 | Core product, Security management | There were inconsistencies in the enforcement of password requirements | Fixed |
| CRMS-1572 | Dashboard | The following error occurred when a user with No Admin Rights attempted to view a List Dashboard Gadget: “An error occurred when attempting to process the Gadget. Please contact your System Administrator.” | Fixed |
| CRMS-2182 | Database | It was not possible to create a backup of the Sage CRM database | Fixed |

| | | | |
|-------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| CRMS-2093 | Documentation | The instructions for configuring standard email did not reference enabling SMTP Client Authentication | User Guide updated |
| CRMS-2251 | Documentation | It was unclear that the Import Email button had been moved intentionally | User Guide updated |
| CRMS-2082 | Documentation, Exchange integration | The number of permissions required to enable Exchange Integration was excessive | System Administrator Guide updated |
| CRMS-2232 CRMS-2237 CRMS-2249 | Email management | It was not possible to create New Email Aliases | Fixed |
| CRMS-2103 | Exchange integration | When a user registered for a Microsoft Teams webinar as an attendee, the meeting was not synchronized from Outlook to Sage CRM | Fixed |
| CRMS-2272 CRMS-2275 CRMS-2276 | Exchange integration | Sage CRM could not connect to the Exchange Sync Engine | Fixed |
| CRMS-1755 | Import contacts & emails | Attachments with uppercase extensions were not imported, and generated an error: “The type of this file is prohibited by your system administrator. This file will not be uploaded.” | Fixed |
| CRMS-1976 | Opportunities | The calendar icon was missing from the screen to create a New Opportunity | Fixed |
| CRMS-2159 | Opportunities | When a user created an Opportunity, the Opened date changed to the date set in Close by | Fixed |
| CRMS-376 | Reports | Custom fields were not retained on cloned reports | Fixed |

| | | | |
|-----------|---------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| CRMS-2223 | Security management | The following security vulnerability affected the version of Apache Tomcat supplied with Sage CRM: CVE-2025-48984 | Fixed Tomcat has been updated to version 9.0.112 |
|-----------|---------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|

Discontinued features

Classic Dashboards. This legacy feature had been retained for customers upgrading from older versions of Sage CRM but poses potential security vulnerabilities if left active. It was deprecated in Sage CRM 2025 R2 and has been removed in Sage CRM 2026 R1.

If you are currently using the Classic Dashboard, you should review and replicate key dashboards using the modern Dashboard feature. For details see [Advisory: Classic Dashboards to be deprecated in Sage CRM 2025 R2](#) on the Sage Community Hub.

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2026 R1 at the time of release.

| Issue ID | Area | Description |
|-----------------------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRMS-450, CRMS-595 | Email | <p>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 Firefox web browsers and is caused by a third-party component called CKEditor.</p> <p>WORKAROUND 1</p> <p>Hold down Ctrl and right-click the misspelled word to display a list of suggestions.</p> <p>WORKAROUND 2</p> <p>Install and use a spellchecker extension for your web browser such as LanguageTool.</p> |
| CRMS-714 | Email | <p>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.</p> <p>WORKAROUND</p> <p>Below the email editor box, browse for and select a local image file. Select Upload inline image.</p> |

| Issue ID | Area | Description |
|----------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| N/A | RESTful API | <p>When using the RESTful API, you may observe the following issues.</p> <p>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.</p> <p>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.</p> <p>REASON</p> <p>Issue 1: This is by design. The RESTful API always uses HTTP in the URLs of returned records.</p> <p>Issue 2: To form the URLs of returned records, the RESTful API uses the server name stored the <code>Parm_Value</code> column of the <code>Custom_SysParams</code> 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:</p> <pre>myserver;myservername.mydomain.com</pre> <p>The RESTful API always uses the first server name stored in this column.</p> <p>WORKAROUND FOR ISSUE 2</p> <p>Change the order of the server names stored in the <code>Parm_Value</code> column of the Sage CRM database, so that the FQDN of your server comes first.</p> <ol style="list-style-type: none"> 1. See the server names stored in the <code>Parm_Value</code> column: <pre>SELECT Parm_Value from Custom_SysParams where Parm_Name='ServerNames'</pre> 2. Back up the Sage CRM database. 3. Run a SQL query to change the order of the server names, for example: <pre>UPDATE Custom_SysParams SET Parm_Value = 'myservername.mydomain.com;myserver' WHERE Parm_Name = 'ServerNames'</pre> |

| Issue ID | Area | Description |
|-----------|-------------|-----------------------------------------------------------------|
| CRMS-1630 | RESTful API | RESTful API performance may be slow because of the below issue. |

Any API call sent to

```
http://{server name or IP}/sdata/{installName}j/
sagecrm2/-/{resource}
```

is redirected by IIS to

```
http://localhost:{port number}/{installName}j/
sagecrm2/-/{resource}.
```

As a result, the response from the RESTful API contains a JSESSIONID cookie with the incorrect path:

```
Path={installName}j instead of Path=/sdata/{installName}j
```

Because of the incorrect path, the browser does not register the cookie. This causes Sage CRM to create a new session with a new JSESSIONID cookie.

WORKAROUND

Create an outbound rewrite rule in IIS to change the cookie path in responses from `Path={installName}j` to `Path=/sdata/{installName}j`.

Example:

```
<outboundRules>
...
<rule name="Change Set-Cookie crmj HTTP" enabled="true">
  <match serverVariable="RESPONSE_Set-Cookie"
    pattern="^JSESSIONID=([^;]+); Path=\/crmj;" />
  <action type="Rewrite" value="JSESSIONID={R:1};
    Path=/sdata/crmj; HttpOnly;" />
  <conditions>
    <add input="{SERVER_PORT_SECURE}" pattern="0" />
  </conditions>
</rule>
...
</outboundRules>
```

This example uses `crm` as the install name.

For more information, see [Creating Outbound Rules for URL Rewrite Module](#) in the Microsoft documentation.

| Issue ID | Area | Description |
|----------|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRMS-430 | RESTful API, SData | <p>In Postman, when you use wildcard characters (%) in a GET request to return specific records, you receive unexpected results.</p> <p>For example, the following request returns all companies instead of just the companies whose name contains <i>Gate</i>:</p> <pre data-bbox="570 422 1279 478">GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'</pre> <p>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.</p> <p>WORKAROUND 1</p> <p>Use URL encoding (%25) to encode the wildcard characters (%) in your request, for example:</p> <pre data-bbox="570 884 1279 940">GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%25Gate%25'</pre> <p>WORKAROUND 2</p> <p>Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.</p> |
| N/A | Tags | <p>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.</p> <p>WORKAROUND</p> <p>Ignore this behavior. A tag is not removed until you confirm its removal.</p> |
| CRMS-151 | User interface | <p>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.</p> <p>WORKAROUND</p> <p>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.</p> |

Open-source components

Sage CRM 2026 R1 installs the following open-source components:

| Component | Legal information |
|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Apache FOP 2.11 | © 2026 The Apache Software Foundation Apache License, Version 2.0 https://www.apache.org/licenses/LICENSE-2.0 Source code: https://github.com/apache/xmlgraphics-fop/releases/tag/2_11 |
| Apache Solr 8.11.4 | © 2026 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/8.11.4/ |
| Apache Tomcat 9.0.112 | © 2026 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 Library General Public License, version 2.0 https://www.gnu.org/licenses/old-licenses/lgpl-2.0.html Source code: https://adoptium.net/en-GB/temurin/releases/?os=windows&arch=x86&package=jre&version=8 |