



Sage CRM 2016 R1 Release Notes

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Overview

This document provides information about issues addressed and issues known to exist, if any, in the Sage CRM 2016 R1 release. It is intended for Sage OpCos, Sage CRM partners, and Sage CRM customers.

While this document refers to Sage CRM, CRM, or the CRM system, regional products may use different brand names.

Documentation and Help

To view context-sensitive Help, click the help icon  in Sage CRM 2016 R1.

For online User Help, online System Administrator Help, and all PDF documentation for this release, go to <http://help.sagecrm.com>.

Enhancements implemented in Sage CRM 2016 R1

- **Smart autocomplete in web browsers.** Now the autocomplete feature offers suggestions based on the Sage CRM context you're in.
- **Standard default email template is now available.** Administrators can access this email template in **<Your Profile> | Preferences | Default Email Template**. Users can access this email template when sending mass emails or sending a single email from the context of an entity.
- **Document upload progress.** When a user uploads a file by dropping it onto the **Documents** tab, Sage CRM now shows detailed document upload progress.
- **Logon status messages on the splash screen.** When a user logs on to Sage CRM, the splash screen now displays detailed status messages about the logon progress.

Issues addressed in Sage CRM 2016 R1

Issue ID	Area	Description	Status
0-156793-QA	Cases	When a user clicked a company name in the list of cases, an error occurred.	This issue is fixed.
0-164837-QA	Companies/People	When a user created a new follow-up task for a completed task, an error occurred.	This issue is fixed.
0-162603-QA	Configuration	When a user was creating a new entity record that had the Person field, the entered value disappeared from that field and there was no way to enter it again.	This issue is fixed.
0-165079-QA	Configuration	When a user tried to log on to Sage CRM, an error occurred.	This issue is fixed.
0-161416-QA	Core Product	When a user accessed a custom entity record whose name contained an ampersand (&), an error occurred.	This issue is fixed.
0-162107-QA	Core Product	When a user clicked New on the Quick Look tab of a person record, the menu that opened was truncated. This issue only occurred in the Google Chrome browser.	This issue is fixed.
0-164596-QA	Core Product	The Quick Search option in the top right corner of the Sage CRM window erroneously returned companies that were already deleted.	This issue is fixed.
0-162392-QA	Customization	In the context of a person record, the Status field of the filter provided on the Opportunities tab showed the incorrect default value.	This issue is fixed.
0-162779-QA	Customization	With inline screen customization enabled, it took a significant amount of time (10+ seconds) to open, update, and save Sage CRM screens.	This issue is fixed.
0-163618-QA	Customization	When a user created a new custom entity record with associated records, no associated records were listed for the custom entity record.	This issue is fixed.

Issue ID	Area	Description	Status
0-163654-QA	Customization	An entity record wasn't available for editing from the context of another record with which it was associated.	This issue is fixed.
0-163692-QA	Customization	When a user viewed a list of entity records or created a new task in the context of an entity record, an error occurred.	This issue is fixed.
0-163740-QA	Customization	A person's details were not auto-filled in the new task or appointment created from the context of an entity record with which the person is associated.	This issue is fixed.
0-164678-QA	Customization	A user could not log in after Sage CRM was customized.	This issue is fixed.
0-164966-QA	Customization	When a user entered a date in a date-only field using United States date format, an error occurred.	This issue is fixed.
0-165283-QA	Customization	Some fields on a custom entity were not auto-populated as expected.	This issue is fixed.
0-164310-QA	Database	The option to recover user's password didn't work.	This issue is fixed.
0-163760-QA	Comms/Diary	When a user clicked the time icon next to a date field in a new task or appointment, no time selection drop-down list opened.	This issue is fixed.
0-164932-QA	Comms/Diary	When a user edited the email reminder template to include person and company merge fields, these fields were not merged.	This issue is fixed.
0-161375-QA	Component Management	The location a user mapped in the Map Add-on didn't appear on the map.	This issue is fixed.
0-162331-QA	Document Drop	In the Spanish-language version of Sage CRM, ActiveX didn't install automatically. As a result, the Drop Documents plug-in was unavailable.	This issue is fixed.
0-165016-QA	Document Drop	It was not possible to install the Document Drop plug-in in Microsoft Internet Explorer because the plug-in was not signed.	This issue is fixed.
0-163797-QA	E-mail Client	When a user tried to send an email message, an error occurred. This happened when the Business E-mail field contained two or more email addresses.	This issue is fixed.
0-164978-QA	E-mail Client	When a user forwarded an email, the subject was deleted from the forwarded email.	This issue is fixed.

Issue ID	Area	Description	Status
0-165208-QA	E-Marketing (MailChimp)	Groups were not sent to MailChimp.	This issue is fixed.
0-164906-QA	Find/Advanced Find	When a user searched an entity using a multi-select field, the returned search results were not filtered according to the values selected in the field.	This issue is fixed.
0-165310-QA	Find/Advanced Find	When a user performed a search in the French-language version of Sage CRM, an error occurred.	This issue is fixed.
0-163819-QA	Hosting Cloud platform	When a system administrator added a new user, an error occurred.	This issue is fixed.
0-165021-QA	Hosting Cloud platform	When a request for a new user license was submitted, an error occurred.	This issue is fixed.
0-165082-QA	Hosting Cloud platform	When a user tried to log on to Sage CRM, an unhandled exception was thrown.	This issue is fixed.
0-158555-QA	Interactive Dashboard	When a user tried to copy the default interactive dashboard, an error occurred.	This issue is fixed.
0-165115-QA	Dashboard (Interactive)	Appointments were unexpectedly missing from calendar.	This issue is fixed.
0-163431-QA	Mail Merge	When a user tried to open a document template attachment, the Windows Security dialog box opened prompting to enter user credentials. However, after entering the credentials the attachment didn't open.	This issue is fixed.
0-164961-QA	Mail Merge	Custom fields added to a merge template didn't merge.	This issue is fixed.
0-163814-QA	Navigation	The Search bar in the top right corner didn't work as expected.	This issue is fixed.
0-164158-QA	Notification	When a user created an email notification, some fields were not available for insertion into the email.	This issue is fixed.
0-158801-QA	Opportunities	Values in the Opportunity fields had a question mark in parentheses (?) appended.	This issue is fixed.
0-164768-QA	Opportunities	When a user tried to convert a lead to an opportunity, an error occurred.	This issue is fixed.
0-165051-QA	Opportunities	When a user tried to add or search for a person or company, an SQL error occurred.	This issue is fixed.
0-164584-QA	Order Entry/ Products	When a user created a new order, the Company and Address fields were not populated automatically.	This issue is fixed.

Issue ID	Area	Description	Status
0-162227-QA	Quotes/ Orders	A new line item added to a quote was not displayed at the bottom of the quote screen.	This issue is fixed.
0-164979-QA	Outlook Integ	When a user was logged out of Sage CRM because of inactivity, the user's Microsoft Outlook was also logged out.	This issue is fixed.
0-164933-QA	Outlook Integ - Classic	When a user clicked File Email in Outlook plug-in, an error occurred.	This issue is fixed.
0-165169-QA	Performance/Scalability	When a user tried to open a primary entity record, an error appeared.	This issue is fixed.
0-161085-QA	Smart Entities	When a user created a new entity record that can have one person and one company, the person and company drop-down lists didn't work as expected on the entity record.	This issue is fixed.
0-162252-QA	Smart Entities	When a user created a new entity record from the context of a person, the person name didn't display on the entity record until it was saved.	This issue is fixed.
0-164882-QA	Smart Entities	All entity records of one type displayed the same error message on the Summary tab.	This issue is fixed.
0-165129-QA	Smart Entities	A smart entity failed to display a message it was supposed to display on the Summary screen.	This issue is fixed.
0-162253-QA	Self Service	In certain situations, the Self Service tab was erroneously available in the context of a person.	This issue is fixed.
0-164865-QA	Translation (English prod)	Spanish-language captions provided in Sage CRM were incorrect.	This issue is fixed.
0-163918-QA	User Interface	The list of users in the My CRM area didn't show users who were set as resources.	This issue is fixed.
0-164136-QA	User Interface	The Welcome area of the Getting Started screen showed the incorrect video (how to set up new users).	This issue is fixed.
0-164668-QA	User Interface	When a user accessed Sage CRM through Microsoft Internet Explorer, Sage CRM keyboard shortcuts failed to work.	This issue is fixed.

Issue ID	Area	Description	Status
0-164820-QA	User Interface	<p>When a user created a new entity record that had M:1 relationship with a company and/or person, the following issues occurred:</p> <ol style="list-style-type: none"> 1. If the record was created from the context of a person, the person's name was populated automatically, but the company's name was left blank. 2. When a user manually selected the company's name, the person's name was deleted from the entity record. 	This issue is fixed.
0-164821-QA	User Interface	In some situations, the Self Service tab was erroneously available in the context of a person. When a user clicked that tab, the Communications screen opened.	This issue is fixed.
0-163618-QA	User Management	A user that was set as a resource was missing from Calendar.	This issue is fixed.
0-163767-QA	User Management	Disabled users were unexpectedly present in the drop-down menus.	This issue is fixed.
0-163925-QA	Field Validation	When a system administrator entered a value in the Add Translation field and pressed ENTER, the entered value was not saved.	This issue is fixed.
0-163726-QA	Virtual Entities	When a user clicked the Summary tab in the context of an entity record, an error occurred.	This issue is fixed.
0-164415-QA	Web Services	The Getmetadata method returned an incomplete set of field values for an entity. This issue occurred in a situation where some of the entity fields to be returned were in the edit mode.	This issue is fixed.