Sage CRM

Sage CRM 7.3
Release Notes

sage

Sage CRM

Contents

Overview

These release notes are for Sage OpCos, Sage CRM partners, and Sage CRM customers.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

Who can install this release?

The install options available for 7.3 are as a full install. The **full install** can be used for a new install of 7.3 or an upgrade from 7.2

Date of Release

December 2014

Version Numbers

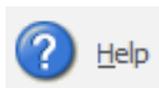Release Version: 7. 3

DLL Version: 7.3.0.1

Doc Plugin: 7.3.0.1

Outlook Plugin: 7.3.0.1

CTI Plugin: 7.3.0.1

Documentation and Help

- All documentation for this release is available at http://help.sagecrm.com/.
- More resources are available on the Community.
- To access User and System Administrator help from anywhere in Sage CRM, click the help icon or help link.

Help icon

Help link

Sage CRM 7.3 Issues List

Note: The message "This issue cannot be reproduced" in the Status column means the issue could not be reproduced on the latest version and patch. An upgrade to the latest version and patch should resolve the issue.

Ref ID	Area	Description	Status
0-146019-QA	Install / Upgrade	The € symbol was used instead of EUR.	This issue is fixed.
0-149909-QA	Exchange Integration	The User Guide incorrectly stated that when a resource user was added as an attendee on an appointment in Sage CRM, and the appointment was opened in Exchange, the user appeared as a required attendee.	This issue is fixed.
0-150854-QA	Companies / People	The Person list on a Company record displayed incorrect records.	This issue is fixed.
0-151057-QA	Comms/Diary	Lead information wasn't displayed in the calendar list view.	This is by design.
0-155239-QA	Customization	When a user tried to create a currency field on case progress, a numeric field was created instead and a SQL error occurred.	This issue cannot be reproduced.
0-155531-QA	Core Product	Indonesia wasn't included in the Country drop down list when creating a new company.	This issue is fixed.
0-155652-QA	Outlook Integ - Exchange	If there were several email attachments with the same name, only one attachment was saved when the email was filed using Exchange.	This issue is fixed.
0-156092-QA	User Management	A System Administrator couldn't specify the required password length or password security settings.	This issue is fixed.
0-157515-QA	Customization	Multiline text was displayed on a single line when using Chrome.	This issue cannot be reproduced.
0-157713-QA	Reports	On IE10, a report that was generated using a small screen resolution had two side scroll bars instead of one.	This issue cannot be reproduced with IE11.
0-157765-QA	E-mail Client	When text was pasted from Word into the Sage CRM text editor, some formatting was lost.	This issue cannot be reproduced.
0-158079-QA	Notification	The Notifications drop-down list was hidden.	This issue is fixed.

Ref ID	Area	Description	Status
0-158387-QA	Comms/Diary	Firefox hot keys incorrectly opened a new window instead of navigating to another screen in the same window.	This issue is fixed.
0-158898-QA	E-Marketing (Swiftpage)	When a company with two or more contacts was used in an emarketing campaign, the emarketing emails were sent to only one of the company contacts.	This issue cannot be reproduced.
0-159049-QA	Comms/Diary	It was not possible to delete an attachment on a filed email.	This issue cannot be reproduced.
0-159085-QA	Customization	When a user selected and saved a value for a custom selection field on an entry screen, an error occurred.	This issue is fixed.
0-159115-QA	Address Linking	When a user tried to create a new Company address using the 'Select an Address to Update or Copy' hyperlink, the existing address type wasn't correctly displayed. See 0-159769-QA	This issue is fixed.
0-159212-QA	Core Product	Phone numbers were duplicated on the Person summary screen.	This issue is fixed.
0-159240-QA	Customization	It was possible to add a selection list entry that was longer than the maximum length of the target field.	This issue is fixed.
0-159242-QA	SData Provider	There was an issue with the SData feed for emails.	This issue is fixed.
0-159262-QA	Multi Server	On a multiserver system using a hardware load balancer, SQL logging values on one web server weren't updated on the other web servers.	This is by design.
0-159372-QA	Reports	HTML code was included in the email text field of a communications report.	This issue is fixed.
0-159378-QA	Mail Merge	When a user performed a mail merge using a static group, the wrong view was used.	This issue cannot be reproduced.
0-159400-QA	Customization Wizard	A user was redirected to an unexpected screen when working with a custom entity record.	This is by design.
0-159497-QA	Address Linking	A System Administrator couldn't reorder entries in the Country drop-down list on the Address entity.	This is by design.
0-159505-QA	Exchange Integration	When a user tried to save an appointment with no organizer, an error occurred.	This issue cannot be reproduced.

Ref ID	Area	Description	Status
0-159713-QA	E-Marketing (SageCRM)	The 'Percentage Complete' field for a completed wave activity displayed an incorrect value.	This issue is fixed.
0-159769-QA	Address Linking	When a user tried to create a new Company address using the 'Select an Address to Update or Copy' hyperlink, the existing address type wasn't correctly displayed.	This issue is fixed.
0-159772-QA	Opportunities	The opportunity list was filtered only once despite the number of times a user clicked the opportunity pipeline graphic.	This issue is fixed.
0-159824-QA	Customization Wizard	A number was displayed instead of a company or person name in an email template for a custom entity.	This issue is fixed.
0-159930-QA	Quotes / Orders	When a user created a new quote and left a required field empty, a validation warning wasn't displayed.	This issue is fixed.
0-159957-QA	Customization Wizard	It was not possible to perform a mail merge in the context of a custom entity.	This issue is fixed.
0-159970-QA	Outlook Integ	In Exchange Integration, the title bar of the File Email screen displayed the wrong screen name.	This issue is fixed.
0-160113-QA	Workflow	The 'Save' workflow button on a communication task didn't open the correct screen.	This is by design.
0-160226-QA	Customization	The Runblock action didn't execute.	This issue is fixed.
0-160232-QA	Customization	When a user clicked a custom tab that was configured to open in a new window, an error occurred.	This issue is fixed.
0-160261-QA	Timings	When a user updated the start time of a scheduled communication task, the end time wasn't automatically updated.	This issue cannot be reproduced.
0-160301-QA	Customization Wizard	When a user tried to create a new custom entity record, the Find screen was displayed instead of the New screen.	This issue is fixed.
0-160362-QA	User Interface	A user couldn't select 'Relative' from the 'Date/Time' field on a Communication record.	This issue cannot be reproduced.
0-160391-QA	Reports	Report charts were not displayed in Internet Explorer.	This issue cannot be reproduced on IE11.

Ref ID	Area	Description	Status
0-160415-QA	Customization Wizard	It was not possible to create a new entity using the Advanced Customization Wizard.	This issue is fixed.
0-160559-QA	Core Product	Zooming in and out of Sage CRM on Internet Explorer caused the UI to display incorrectly.	This issue is fixed.
0-160637-QA	Find / Advanced Find	The back navigation arrow on the Advanced Find screen didn't work correctly.	This issue cannot be reproduced.
0-160933-QA	Data Upload	During data upload, company and contact data was not correctly linked to the specified account in Sage CRM.	This is by design.
0-160982-QA	Comms/Diary	On Internet Explorer, the start time of an appointment wasn't highlighted in the 'Date / Time' drop-down list.	This issue is fixed.
0-161005-QA	Translation (English prod)	An entry in the 'Country' drop-down list on an address was incorrect.	This issue is fixed.
0-161006-QA	Dashboard (Classic)	An Information Manager couldn't edit standard classic dashboards.	This issue is fixed.
0-161039-QA	Interactive Dashboard	The 'Company Name' field was duplicated on a custom opportunity screen that was accessed from a list gadget.	This issue is fixed.
0-161052-QA	Dashboard (Classic)	Some blocks weren't displayed on the classic dashboard.	This issue is fixed.
0-161056-QA	Customization	The right-click menu didn't work for a custom entity.	This issue cannot be reproduced.
0-161095-QA	Outlook Integ - Exchange	When a user set a task due date in Sage CRM and then synced data to Outlook 365, the task due date in Outlook was the day before the actual due date.	This issue is fixed.
0-161097-QA	Quotes / Orders	An Associated Order hyperlink on the Quote Summary screen didn't link to the correct order record.	This issue is fixed.
0-161131-QA	Web2lead	The 'Lead: Assigned To' selection field on the Web Lead Screen didn't contain user names.	This issue is fixed.
0-161167-QA	Customization	The code for the value 'All' was inconsistent across selection lists.	This issue is fixed.
0-161177-QA	Order Entry / Products	A user was unable to edit and save an existing line item, or create and save a new line item when pop-up mode was enabled.	This issue is fixed.

Ref ID	Area	Description	Status
0-161212-QA	Workflow	When a user progressed through a workflow that contained two 'Create Task' actions in one rule, the context of the second 'Create Task' action was lost.	This issue is fixed.
0-161226-QA	Document Plugin	A user couldn't successfully upload a file when using Internet Explorer.	This is by design.
0-161312-QA	Dashboard (Classic)	A user couldn't add content to the classic dashboard.	This issue is fixed.
0-161376-QA	Reports	Some content and formatting was missing from PDF reports.	This issue is fixed.
0-161427-QA	Core Product	When a user navigated between Product Family list pages, the records in the list were incorrectly sorted.	This issue is fixed.
0-161431-QA	Core Product	It was not possible to apply a sort order on the Product Family list.	This issue is fixed.
0-161461-QA	Find / Advanced Find	When a user performed a custom advanced find, an error occurred.	This issue is fixed.
0-161512-QA	E-mail Manager	When filing an email using Email Manager, the email filing address appeared in the 'Bcc' field instead of the 'Cc' field.	This issue is fixed.
0-161567-QA	Notification	A time was incorrectly generated for a follow up task reminder.	This issue is fixed.
0-161598-QA	Cases	Users were assigned to cases relating to companies that they couldn't access.	This is by design.
0-161653-QA	Key Attribute Data	A user was unable to run a key attribute report on a French system.	This issue cannot be reproduced.
0-161654-QA	Comms/Diary	It was not possible to save an appointment if the organizer wasn't included in the user list.	This issue cannot be reproduced.
0-161767-QA	E-Marketing (Swiftpage)	Context was lost on an E-marketing campaign.	This issue is fixed.
0-161807-QA	Core Product	Duplicate billing address fields were displayed when a user created a new quote.	This is by design.
0-161847-QA	Workflow	A workflow rule name appeared differently for different entities.	This is by design.
0-161852-QA	Mobile	A user was unable to enter data in a new multiselect field on iPad.	This issue cannot be reproduced.

Ref ID	Area	Description	Status
0-161883-QA	Comms/Diary	A search for communication records using Find returned different results than a search for communication records using Advanced Find.	This issue is fixed.
0-161996-QA	Opportunities	When the opportunity list was sorted on the 'Assigned to' column, the records were sorted by the user ID rather than alphabetically.	This is by design.
0-162372-QA	Cases	When a user searched for addresses on a company, the number of found addresses that was displayed didn't match the number of returned records.	This issue is fixed.
0-162389-QA	Leads	When a user tried to create a new lead and an existing match was found in Sage CRM, it wasn't possible to use the existing lead.	This issue is fixed.
0-162460-QA	Dashboard (Interactive)	When a user clicked a company link in a gadget on the interactive dashboard, the company page opened in the gadget window rather than in a new window.	This issue is fixed.
0-162472-QA	Exchange Integration	When a user changed the timezone and then tried to sync the user mailbox with Exchange, an error occurred.	This issue is fixed.

Known Issues

- After an upgrade to Sage CRM 7.3, icons for custom entities that were created in Sage CRM 7.2 using the Component Manager are missing. You must copy the icons for these custom entities to the Sage CRM 7.3 Ergonomic folder.
- To exclude a record in a static group from a MailChimp campaign, you must save the group before you send it to MailChimp. To do this, open the static group, check **Exclude** beside the record you want to exclude, and click **Save**. Then click **Send to MailChimp**. If you don't save the group before you send it, the selected records are not excluded from the group.