

Sage CRM 7.3 SP1

Release Notes

Revision: SYS-REA-ENG-7.3SP1-2.0

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1.0 Overview

This document provides information about enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 7.3 SP1 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.

Sage CRM 7.3 SP1 is distributed as:

- **A full installation package** (the package with which these Release Notes are supplied). You can use this package to perform a new installation of Sage CRM or upgrade from a previous version.
- **A patch** you can apply to Sage CRM 7.3. For more information about this patch, see the *Sage CRM 7.3 Patch Release Notes*.

Depending on the region you are in, you can obtain license keys for Sage CRM 7.3 SP1 to install specific product modules such as *Sales*, *Marketing*, and *Service* (or combinations of those modules). For more information on the availability of modules and the configurations available in your region, please contact your local Sage license key team.

When installing Sage CRM 7.3 SP1, 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.

1.1 Release date and files included

Release date	Files included
November 2015	<ul style="list-style-type: none">• eWare.dll 7.3.0.3• Outlook plugin 7.3.0.1• Document plugin 7.3.0.1• CTI plugin 7.3.0.1

1.2 Documentation and help

To view context-sensitive Help, click the **Help** button in Sage CRM 7.3 SP1.

For more information about the software with which Sage CRM 7.3 SP1 can work and integrate, see the *Sage CRM 7.3 SP1 Software Support Matrix*.

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

The following documents are supplied with the Sage CRM 7.3 SP1 full installation package:

- Release Notes (this document)
- Context-sensitive User Help
- Context-sensitive System Administrator Help
- CTI Guide
- Installation and Upgrade Guide
- Mobile Guide
- Self Service Guide
- System Administrator Guide
- Terminal Services and Citrix Guide
- User Guide

2.0 Enhancements implemented in Sage CRM 7.3 SP1

- **Ability to disable table-level scripts.** Now system administrators can selectively disable table-level scripts for a particular entity. To do so, go to **<My Profile> | Administration | Customization | <Entity> | TableScripts**, click the script name and select the **Disable** check box.
- **A new variable that provides information about installed modules.** Now developers, implementers, and system administrators can programmatically get information about modules installed on the system. For that purpose, they can use a new variable called *ModuleCode*. For more information and usage example, see "Example: Getting information about installed modules" in the [Developer Help](#).

3.0 Issues addressed in Sage CRM 7.3 SP1

After installing Sage CRM 7.3 SP1, clear the Web browser cache on each user's computer. This is required to make sure the Interactive Dashboard will work properly after Sage CRM 7.3 SP1 installation.

The status "Cannot reproduce" in the table below means that the issue could not be reproduced on the latest version and patch. An upgrade to the latest version and patch should resolve the issue.

Issue ID	Area	Description	Status
0-164877-QA	3rd Party Software	The US English language JavaScript file was missing from the Text Editor folder.	This issue is fixed.
0-162017-QA	Companies / People	When a user modified the start time/date of an appointment that was set as a full-day event, the end date of the appointment wasn't adjusted automatically.	This issue is fixed.
0-164512-QA	Cases	The magnifying glass icon on the Case_OpenedBy field was inactive.	This issue is fixed.
0-164185-QA	Core Product	When a user clicked New Email on a company that had no email address set, an error occurred.	This issue is fixed.
0-164212-QA	Core Product	No warning appeared when a user created a company with the same name as one of the companies in the demo data. As a result, duplicate company records could occur.	This issue is fixed.
0-164234-QA	Core Product	On a Chinese system, the top content on the Company Summary page was incorrectly displayed.	Cannot reproduce.

0-164279-QA	Core Product	Fields added to the Top Content section of the screen were truncated.	Change configuration.
0-164374-QA	Core Product	An incorrect value for Caption Family and Caption Context fields on a custom entity prevented inline caption editing for the custom entity.	This issue is fixed.
0-164505-QA	Core Product	A Saved Search incorrectly saved a value in the numeric field on an Opportunity.	This issue is fixed.
0-164873-QA	Core Product	There was an issue with iframes.	This issue is fixed.
0-164927-QA	Core Product	An Info Manager was unable to edit the user preferences of another user.	This issue is fixed.
0-164952-QA	Core Product	A user was unable to scroll through report categories in the Reports menu.	This issue is fixed.
0-165434-QA	Core Product	When the AM/PM time format was set in preferences, the date and time value shown in opportunities was blank.	This issue is fixed.
0-165879-QA	Core Product	When a user created a new record and then refreshed the Sage CRM page in web browser, an error occurred.	This is by design.
0-164489-QA	Customization	The maximum length of a view was 3900 characters.	This issue is fixed.
0-164568-QA	Customization	On an integrated system, a user was unable to save a view that was joined to Accounts as a Report View.	This is by design.
0-164652-QA	Customization	Customized tab groups were incorrectly displayed and sometimes duplicated.	This issue is fixed.
0-165008-QA	Customization	The top content for a custom entity was incorrectly formatted.	This issue is fixed.

0-165054-QA	Customization	When a script was added to the top content of a custom entity screen, the screen was not displayed correctly.	This issue is fixed.
0-165004-QA	Database	After an upgrade, the maximum length of the Phone Number field reduced from 255 characters to 47 characters.	This issue is fixed.
0-168428	Documentation	The Edit Attachment button was not available when a user accessed Sage CRM with Microsoft Internet Explorer.	This issue is fixed.
0-163168-QA	Comms / Diary	A scroll bar was missing from the Meeting Planner. As a result, in some cases it was not possible to view the full list of attendees.	This issue is fixed.
0-164191-QA	Comms / Diary	When a user opened an .rtf file in Sage CRM, the file opened in the web browser rather than in Microsoft Word.	This issue is fixed.
0-164192-QA	Comms / Diary	The Regarding field in a new Communication task didn't display information about the associated custom entity record.	Cannot reproduce.
0-164277-QA	Comms / Diary	When a user created a new Communication task, it was incorrectly linked to a Campaign.	This issue is fixed.
0-165398-QA	E-mail Client	A user was unable to send an email using a new email template.	This issue is fixed.
0-164070-QA	Exchange Integration	User access rights were not checked during synchronization between Exchange and Sage CRM.	This is by design.
0-164325-QA	Find / Advanced Find	When merging a person, the Person Find screen opened the wrong company and searched in the wrong context.	This issue is fixed.

0-164878-QA	Find / Advanced Find	A warning message was not displayed when a user tried to navigate to a search result page that didn't exist.	This issue is fixed.
0-163679-QA	Interactive Dashboard	It was not possible to filter a list gadget based on the Account Manager Breakdown report by Account Manager.	This is by design.
0-163673-QA	Dashboard (Interactive)	When a user deleted a gadget from a copy of a dashboard, the gadget was also removed from the original dashboard.	This issue is fixed.
0-164619-QA	Dashboard (Interactive)	Incorrect captions were displayed in the Related Company gadget on the Company dashboard.	This issue is fixed.
0-164622-QA	Dashboard (Interactive)	When a user filtered a dashboard list and then cleared the filter, the filter criteria persisted.	This issue is fixed.
0-165033-QA	Dashboard (Interactive)	A user was unable to create a dashboard gadget that was based on a report containing a custom currency field.	This issue is fixed.
0-164548-QA	E-Marketing (MailChimp)	When a user created a MailChimp campaign, the values of several fields were not saved in the database.	This issue is fixed.
0-164861-QA	E-Marketing (MailChimp)	The values of the MailChimp API Key and List ID fields were deleted after an IIS reset.	This issue is fixed.
0-165061-QA	E-Marketing (MailChimp)	MailChimp Integration failed to work, displaying an error.	This issue is fixed.
0-165529-QA	E-Marketing (MailChimp)	It was not possible to save the MailChimp API key and list ID in Sage CRM.	This issue is fixed.
0-164385-QA	Mail Merge	When a user created or uploaded a document, Communication was	This issue is fixed.

incorrectly included in the drop-down list of entities to save the document against.

0-164565-QA	Mobile	Double quote characters were not displayed correctly on a mobile device using the Mobile theme.	This issue is fixed.
0-164719-QA	Mobile	Tabs were missing from the Summary screen and the Recent List was missing on a mobile device that used the Mobile theme.	This issue is fixed.
0-165512-QA	Mobile	Sage CRM for iPhone didn't work correctly on an iPhone that was upgraded to iOS 9.	This issue is fixed.
0-164676-QA	Notification	On an integrated system, notifications about a sync failure didn't display in real time.	Cannot reproduce.
0-162539-QA	Opportunities	A user was unable to add a new person or company in the context of an Opportunity.	Cannot reproduce.
0-164372-QA	Outlook Integ - Classic	Images didn't appear in an email that was sent from Sage CRM to Outlook.	This issue is fixed.
0-164373-QA	Outlook Integ - Classic	On a Chinese system, the subject and body were missing from original emails in an email thread.	Cannot reproduce.
0-165369-QA	Quotes / Orders	A Quote template incorrectly displayed in English instead of the default system language.	This issue is fixed.
0-165069-QA	Reports	In a report exported to Excel, empty field columns were too narrow.	This issue is fixed.
0-164920-QA	SData Provider	HTTPS links were not provided in an SData feed.	This issue is fixed.
0-164160-QA	User Interface	The Integration icon on the Administration menu was larger than other	This issue is fixed.

icons on that menu.

0-164486-QA	User Interface	No context information was included in the top content on a page that was accessed through a custom menu option.	This issue is fixed.
0-164519-QA	User Interface	No menu options were displayed when a user right-clicked My CRM or Team CRM on a custom entity Find page.	This issue is fixed.
0-164997-QA	User Management	There were issues when enabling a resource user.	This issue is fixed.
0-165849-QA	User Management	When a system administrator tried to rebalance territories, an error occurred.	This issue is fixed.
0-163858-QA	Web2lead	When a user created a lead, the lead_stage field was set to the incorrect value.	This issue is fixed.
0-165243-QA	Web2lead	The stage of a new lead created through Web-to-Lead was incorrect.	This is by design.
0-164953-QA	Workflow	Rules and state icons disappeared from the top of a workflow edit window when a user scrolled down through the window.	This issue is fixed.
0-165066-QA	Workflow	The Execute SQL Statement field for a new workflow action had a maximum length of 256 characters.	This issue is fixed.
0-165125-QA	Workflow	There was an issue with the template for the Send Email workflow action.	This issue is fixed.

4.0 Upgrading to Sage CRM 7.3 SP1

You can use this installation package to upgrade to Sage CRM 7.3 SP1 from Sage CRM 7.2 or 7.3 with or without any patch applied.