

Sage CRM 7.3 SP2

Release Notes

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Overview

This document provides information about enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 7.3 SP2 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 7.3 SP2 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 SP2, 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	Files included
April 2016	<ul style="list-style-type: none">• eWare.dll• Outlook plugin• Document plugin• CTI plugin

Documentation and help

To view context-sensitive Help, click the **Help** button in Sage CRM 7.3 SP2.

For more information about the software with which Sage CRM 7.3 SP2 can work and integrate, see the *Sage CRM 7.3 SP2 Software Support Matrix* 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](#).

The following documents are supplied with Sage CRM 7.3 SP2:

- Release Notes (this document)
- User Help and Guide
- System Administrator Help and Guide
- Troubleshooting Help and Guide
- Citrix XenApp and RDS Support Guide (formerly Terminal Services and Citrix Guide)
- CTI Guide
- Installation and Upgrade Guide
- Self Service Guide

What's new in Sage CRM 7.3 SP2

- **Lite Outlook Integration.** This new feature lets system administrators integrate Sage CRM with Outlook in a 64-bit environment even if Exchange Integration is not enabled. When Lite Outlook Integration is enabled for a user, the user can:

- File Outlook emails to Sage CRM,
- Attach shared Sage CRM documents to Outlook emails,
- Add contacts from Outlook to Sage CRM.

To get the most out of Lite Outlook Integration, we recommend that you use Lite Outlook Integration with Exchange Integration enabled.

For more information about configuring Lite Outlook Integration, see the *System Administrator Guide or Help* on the [Sage CRM Help Center](#).

- **Disable updates with Exchange Integration.** The new **Send updates to past appointments** option lets system administrators disable updates to past appointments in Exchange Integration. When this option is set to **No**, updates to completed meetings or appointments do not trigger notifications to all attendees.

For more information about this option, see "Creating a connection to Exchange Server" in the *Sage CRM System Administrator Guide or Help* on the [Sage CRM Help Center](#).

- **Support for more software.** Sage CRM 7.3 SP2 now supports more third-party software products, including:

- **Microsoft Windows Server 2016.** You can install Sage CRM 7.3 SP2 on computers running this operating system.
- **Microsoft Exchange Server 2016.** The Exchange Integration feature of Sage CRM now can work with Exchange Server 2016.
- **Microsoft Office 2016.** Sage CRM 7.3 SP2 now integrates with Microsoft Office 2016 applications in the same way it does with other supported versions of Microsoft Office.
- **Microsoft SQL Server 2016.** You can use this version of SQL Server to host the Sage CRM database.
- **Citrix XenApp 7.6.** You can use this software to deploy Sage CRM 7.3 SP2 in your environment. For more information, see the *Citrix XenApp and RDS Support Guide* on the [Sage CRM Help Center](#).

Issues addressed in Sage CRM 7.3 SP2

After installing Sage CRM 7.3 SP2, 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 SP2 installation.

The status "Cannot reproduce" in the table below means that the issue could not be reproduced on Sage CRM 7.3 SP2. An upgrade to Sage CRM 7.3 SP2 should resolve the issue.

Issue ID	Area	Description	Status
0-166269-QA	.NET API	ISSUE 1 In some cases, tabs were duplicated in the Sage CRM user interface. ISSUE 2 When a user clicked the Cancel button, one of the following happened: - An error message displayed. - A screen with empty fields displayed.	These issues are fixed.
0-166574-QA	.NET API	Some information was missing from communications created using the Sage CRM mobile apps. For example, companies were not linked to people.	This issue is fixed.
0-164573-QA	Campaign Management	A misleading warning was displayed, stating that your mass emails were not sent.	This issue is fixed.
0-165654-QA	Campaign Management	The Mass Email Status tab erroneously displayed pending mass emails.	This issue is fixed.
0-163926-QA	Cases	Case notes were unexpectedly duplicated across several Case records.	This issue is fixed.
0-163854-QA	Comms/Diary	In some situations, Meeting Planner showed incorrect information.	This issue is fixed.

Issue ID	Area	Description	Status
0-164704-QA	Core Product	A user was unexpectedly logged out from Sage CRM. Subsequent attempts to log back on to Sage CRM failed.	This issue is fixed.
0-165373-QA	Core Product	The forecast pipeline showed incorrect data after the month in the Fiscal Year Start Month option was changed.	By design.
0-165395-QA	Core Product	Clicking the blue arrow button next to an Advanced Search and Select field didn't have any effect. This issue occurred in the Google Chrome web browser.	This issue is fixed.
0-165447-QA	Core Product	Drop-down lists didn't open when Sage CRM was accessed with Microsoft Internet Explorer 11 in Compatibility View.	By design. Sage CRM doesn't support Compatibility View in Microsoft Internet Explorer.
0-165494-QA	Core Product	The Main menu didn't display correctly when the Sage theme was used in Sage CRM.	This issue is fixed.
0-165584-QA	Core Product	An HTTP POST request caused a significant memory consumption by Sage CRM.	This issue is fixed.
0-165585-QA	Core Product	Sage CRM responses to HTTP POST requests contained incorrect data.	This issue is fixed.
0-165629-QA	Core Product	In some rare situations, Sage CRM caused a memory leak.	This issue is fixed.
0-166315-QA	Core Product	Sort order set for companies was reset back to default after user logged off and then logged back on to Sage CRM.	This issue is fixed.
0-166692-QA	Core Product	The Updated by field didn't show the correct value.	This issue is fixed.
0-166260-QA	Customization Wizard	The Mapping Component showed blank maps.	Cannot reproduce.
0-167391-QA	Dashboard (Interactive)	The Interactive Dashboard failed to work when the Sage CRM server wasn't connected to the Internet.	This issue is fixed.

Issue ID	Area	Description	Status
0-166398-QA	Deduplication	<p>With deduplication enabled, duplicate records were created if you performed the following steps in Sage CRM:</p> <ol style="list-style-type: none"> 1. Create a new record whose name is identical to an existing record. 2. Ignore the deduplication warning, click Save, and then click Back in your web browser. 3. Change the company details and click Save. 	By design.
0-166809-QA	E-mail Client	When a user changed the details of a contact, the changes were not merged into some emails.	This issue is fixed.
0-165127-QA	Find / Advanced Find	In Advanced Find, saved searches based on reports were missing from the Saved Searches drop-down list.	This issue is fixed.
0-166389-QA	Find / Advanced Find	Changing the Order By Desc option value for a communication list didn't have any effect.	This issue is fixed.
0-162310-QA	Install / Upgrade	When Sage CRM program files were reinstalled, the database password was deleted.	This issue is fixed.
0-165455-QA	Install / Upgrade	On an integrated system, it was not possible to save a new currency in a two letter format.	By design. ISO currency codes used by Sage CRM include three letters.
0-166152-QA	Dashboard (Interactive)	The Gadget Templates dialog box displayed an error when loading data.	Cannot reproduce.
0-165153-QA	Mail Merge	Incorrect entity type (All) was shown in the Type drop-down list when a user selected Merge to PDF .	This issue is fixed.
0-166351-QA	Mapping Component	The location of a company wasn't shown on the Map tab.	This issue is fixed.

Issue ID	Area	Description	Status
0-165298-QA	Mobile	<i>Sage CRM for iPhone</i> failed to upload new companies whose name included an ampersand character (&).	This issue is fixed in <i>Sage CRM for iPhone 2.0.6</i>
0-166304-QA	Mobile	Appointments created with the <i>Sage CRM for iPhone</i> mobile app showed incorrect time.	Cannot reproduce on <i>Sage CRM for iPhone 2.0.6</i>
0-166550-QA	Mobile	An error occurred in <i>Sage CRM for iPhone</i> when a user tried to log on to Sage CRM.	This issue is fixed in <i>Sage CRM for iPhone 2.0.6</i>
0-167085-QA	Mobile	When a user added a new communication to a company, a validation error occurred.	This issue is fixed.
0-165378-QA	Opportunities	When a user was creating a new opportunity, the top content header in Sage CRM displayed the incorrect company name.	This issue is fixed.
0-166377-QA	Outlook Integ - Classic	When a user filed an email message with a PDF file attached, the message was filed without the attachment.	This issue is fixed.
0-166392-QA	Outlook Integ – Classic	When a user tried to file an email from a thread (also known as conversation), the file operation failed.	This issue is fixed.
0-164991-QA	Outlook Integ - Exchange	With Exchange Integration enabled, the Add Contact option was not available on contacts located in a subfolder within the Contacts folder in Microsoft Outlook.	By design.
0-166201-QA	Outlook Integ - Exchange	A user's attempt to file an email using iPhone failed.	This issue is fixed.
0-167435-QA	Outlook Integ – Exchange	Lite Outlook Plugin failed to populate the appropriate fields in Outlook to mark an email as filed.	This issue is fixed.
0-165422-QA	Quotes / Orders	When a user clicked an order or a quote attached to an email, an error occurred.	This issue is fixed.

Issue ID	Area	Description	Status
0-165534-QA	Quotes / Orders	The select date icon (calendar) wasn't available when Sage CRM was accessed with Microsoft Internet Explorer in Compatibility View.	By design. Sage CRM doesn't support Compatibility View in Microsoft Internet Explorer.
0-165442-QA	Reports	Sage CRM stopped responding when a user tried to export data to a CSV, XLS, or XLSX file or send groups to MailChimp.	This issue is fixed.
0-166230-QA	Reports	ISSUE 1 In Reports, saved Advanced Find searches were missing from the Saved Searches list. ISSUE 2 In Reports, when a user switched to Advanced Find, all search criteria configured on the first step of the report builder were lost.	ISSUE 1 This issue is fixed. ISSUE 2 By design.
0-166232-QA	Reports	When a user exported a report to an XLS or XLSX file, incorrect formatting was applied to some or all cells in the resulting file.	This issue is fixed.
0-166296-QA	Sales Forecasting	If a user's fiscal year started in March, to view quotes for December of the previous year in Sage CRM, the user had to specify the 4th quarter of the next year. For example, to view quotes for December 2015, the user had to specify the 4th quarter of 2016.	By design.
0-164903-QA	SCRM iPhone App	In communications created using the <i>Sage CRM for iPhone</i> app, the user name was missing and the date/time of communication was incorrect.	This issue is fixed.
0-165535-QA	Groups / Target Lists	Excluded records were deleted from a static group.	This issue is fixed.
0-165289-QA	Translation (English prod)	Changing the name of a team in the Sage CRM UI didn't automatically change the corresponding team caption.	By design. You should change the team caption manually.

Known Issues in Sage CRM 7.3 SP2

Issue ID	Area	Description	Workaround
0-167389-QA	Outlook Integ - Exchange	<p>After logon, a user is prompted to install a new version of Lite Outlook Plugin, although the latest plugin version is already installed.</p> <p>CAUSE: web browser cannot delete the existing .ocx file on a client computer when downloading a new version of that .ocx file.</p>	<ol style="list-style-type: none">1. On the client computer, open the following folder: %WinDir%\Downloaded Program Files2. Delete the following files: leExchangeProxy.ocx OtlTools.ocx3. Use Internet Explorer to connect to Sage CRM and install Lite Outlook Plugin.

Upgrading to Sage CRM 7.3 SP2

You can use the Sage CRM 7.3 SP2 installation package to perform a new installation of Sage CRM or upgrade from a previous version.

You can upgrade to Sage CRM 7.3 SP2 from Sage CRM 7.2 or 7.3 with or without any patch applied.