Sage CRM 7.3 SP3

Release Notes

Revision: SYS-REA-ENG-7.3SP3-2.0
Updated: August 2016

Contents

Overview

This document provides information about enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 7.3 SP3 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 SP3 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 SP3, 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
July 2016	• 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 SP3.

For more information about the software with which Sage CRM 7.3 SP3 can work and integrate, see the *Sage CRM 7.3 SP3 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 SP3:

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

What's new in Sage CRM 7.3 SP3

- UI/UX enhancements
- MailChimp Integration enhancements
- Workflow enhancements
- Sage CRM Connector enhancements

UI/UX enhancements

We have updated the Sage CRM user interface to make it more user-friendly and easier to use. The new Sage CRM user interface meets the Sage global branding guidelines and provides a consistent user experience when Sage CRM integrates with Business Management Systems (BMS).

The changes include:

- **Enhanced main menu**. Sage CRM now has a compact and responsive main menu that is easy to use on any display regardless of its size.
- **Enhanced tabs**. Horizontal tabs now always stay visible even when you scroll. Thanks to our new color scheme, an active tab is clearly highlighted, indicating your current location in Sage CRM.
- **New top bar icons**. We have reworked the *notification*, *history*, *search*, and *my profile* icons displayed in the top right corner of the screen to make them bigger, more intuitive, and easier to use.
- **Companion buttons**. Now action buttons on the right-hand side of the screen stay onscreen even when you scroll, making it easier for you to perform the actions without excessive vertical scrolling. When the number of action buttons is larger than the screen, Sage CRM adds a scroll bar so you can select the desired action.
- **Changes to fonts and spacing**. More spacing between elements on Sage CRM screens, updated fonts, and better contrast rate improve the readability of information, allowing you to concentrate on the task at hand.
- **Weekly calendar view**. Now the calendar in weekly view displays the subject of each appointment.

MailChimp Integration enhancements

There are several MailChimp Integration enhancements in this release.

- Integrating Sage CRM and MailChimp
- Adding contacts to a MailChimp list
- Using merge fields in campaign emails
- Viewing MailChimp campaign results

Integrating Sage CRM and MailChimp

- As a system administrator, we've made it easier for you to switch from Swiftpage to MailChimp and from MailChimp to Swiftpage. As always when making changes like this, you should back up the database to ensure data integrity.
  - To switch from Swiftpage to MailChimp, you must first disable the Swiftpage Integration. To do this, click **<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Disable Integration**. To re-enable a disabled MailChimp integration, click <My Profile> | Administration | Email and Documents | MailChimp Integration | Edit | Enable. For information about creating a new MailChimp Integration, see the System Administrator Help.
  - To switch from MailChimp to Swiftpage, you must first disable the MailChimp Integration. To do this, click **<My Profile> | Administration | Email and Documents | MailChimp Integration | Disable**. To re-enable an existing Swiftpage Integration, click **<My Profile> | Administration | Email and Documents | SwiftPage E-marketing | Enable Integration**. For information about setting up a new Swiftpage Integration, see the System Administrator Help.
- A system administrator, you can now specify how often synchronization occurs between MailChimp and Sage CRM.
  - Click **<My Profile> | Administration | Email and Documents | MailChimp Integration**.
  - In **Communications and Opt out requests**, specify how often a communication record is created for each email recipient, and how often opt out requests are applied to remove recipients from a campaign.
  - In **Campaign results**, specify how often campaign statistics are synchronized from MailChimp to Sage CRM.
  - Click **Save**.

Adding contacts to a MailChimp list

For end users, we've added a notification that tells you if a group was successfully sent to MailChimp or if any errors occurred when trying to send the group.

1. Click **My CRM | Groups**.
2. Create a new group and click **Send to MailChimp**.
3. Click the **Notifications** icon at the top of the screen to see if the group was sent successfully to MailChimp. The notification displays the number of contacts with new or updated email addresses that were successfully sent to MailChimp, the number of contacts with missing email address that were sent to MailChimp, and the number of contacts that MailChimp couldn't process. These unprocessed contacts are counted as errors and included in an error group. You can click the error count in the notification to open the group and correct the contact details.

Using merge fields in campaign emails

We've increased the number of merge fields that you can use in a MailChimp campaign. It's a good idea to include merge fields in your campaign emails to make them more personal. You can add merge fields based on the Company, Person, and Lead entities; see the table below for a complete list of possible merge fields. The fields that are available depend on the context and underlying view you used when defining the group (segment). For more information, see http://mailchimp.com/features/merge-tags.

- To add merge fields to a MailChimp campaign, do the following:
  - Click **My CRM | MailChimp Campaigns** and click **New**.
  - Specify the campaign details and click **Create Campaign**. MailChimp opens in a new browser window.
  - Add the merge fields, complete the other campaign details, and save the campaign. For more information, see the User Help.

Field label and type	Sage CRM field name
Company name	COMPNAME
Company email address	COMP_EMAIL
Company type	COMP_TYPE
Company status	COMP_STATU
Company source	COMP_SOURC
Company territory	COMP_TERRI
Company revenue	COMP_REVEN
Company employees	COMP_EMPLO
Company sector	COMP_SECTO
Company website	COMP_WEB
Person first name	FNAME
Person last name	LNAME

Field label and type	Sage CRM field name
Person email address	PER_EMAIL
Person salutation	PER_SALUTA
Person title	PER_TITLE
Person title code	PER_TITLEC
Person department	PER_DEPART
Person status	PER_STATUS
Person source	PER_SOURC
Person gender	PER_GENDE
Lead description	LEADDESC
Lead person email	LEA_EMAIL
Lead company name	LEA_COMPNA
Lead first name	LEA_FNAME
Lead last name	LEA_LNAME
Lead company country	LEA_COUNTR
Lead personal salutation	LEA_SALUTA
Lead source	LEA_SOURCE
Lead stage	LEA_STAGE
Lead status	LEA_STATUS

- If you have MailChimp administrator rights, you can rename Sage CRM merge fields in MailChimp to reflect customization changes. To rename the fields, open MailChimp and do the following:
  - Click **Lists**.
  - Click the **Stats** drop-down beside the list name and choose **Settings**. If you have only one list and no subscribers, click **Settings** at the top of the page.
  - Click **List fields and Merge tags** and enter the new names.
  - Click **Save Changes**.

Viewing MailChimp campaign results

We've separated statistics about unsent emails into **Soft Bounces** and **Hard Bounces** categories to more accurately reflect how MailChimp categorizes campaign emails. For more information, see Soft vs Hard Bounces.

To view campaign statistics, do the following:

1. Click **My CRM | MailChimp Campaigns**.
2. Click a campaign hyperlink. Statistics about the campaign are categorized and displayed in the **MailChimp Campaign Results** panel. The time and date at which the campaign was created are also displayed.
   - **Soft Bounces**: The number of emails marked as soft bounces by MailChimp.
   - **Hard Bounces**: The number of emails marked as hard bounces by MailChimp.
3. Click a category hyperlink to view more detailed information about the contacts in the category and to create a group based on these contacts.

Workflow enhancements

We've created a new Create Appointment workflow action that system administrators can add to a workflow process. We have also enhanced the existing Send Email workflow action to automatically file emails.

- Create Appointment action
- Create Appointment fields
- Send Email action

Create Appointment action

We've created a new follow up workflow action called Create Appointment that prompts users to schedule an appointment as part of a workflow process. Alternatively, you can use the action to automatically create an appointment with predefined values and no user input. You cannot use the Create Appointment action with Primary rules because the workflow entity must exist before you can link appointments to it. You can use the Create Appointment action with Transitional, Conditional, and Global workflow rules.

To add a new Create Appointment action to a rule, do the following:

1. Click **<My Profile> | Administration | Advanced Customization | Workflow**.
2. Click the workflow to which you want to add the action and click **Edit Workflow**.
3. In the workflow tree, click the rule to which you want to add the action.
4. Scroll to the bottom of the page and click **New**. The Actions Palette is displayed, showing available actions, divided into logical groups.
5. Click **Create Appointment**.
6. Complete the Create Appointment fields and click **Save**. The new workflow action is displayed in the list of actions on the Workflow Rule page.

Create Appointment fields

The table below explains the fields on the **Workflow Action Details** page for Create Appointment.

Field	Description
Type	The type of action to be performed.
Get Default User From	The user for whom the appointment is created. You can use a parameter to insert the user who's currently logged on. For example, #comm_userid#, #oppo_assigneduserid#, #lead_assigneduserid#, #case_assigneduserid#, or #soln_assigneduserid#. If you specify a user in User, leave this field blank.
Attribute	Specifies whether the workflow action screen is Hidden, Required, or Read Only. Select **Hidden** to automatically create an appointment with predefined values and no user input.
Label for new appointment	A label that's attached to the appointment. The label can be used in JavaScript conditions on future workflow rules to test the values of fields on the communication. For example, Display the Closed workflow rule when Status of related communication labeled "XYZ" is equal to Complete.
Order	The order in which the action is executed. If this is the only action on the rule, leave **Order** blank. If there are many actions on the rule, give each action a priority. For example, when **Order** is set to *1*, this action is the first to be executed.
Action	The type of action. For example, Meeting.
Subject	The subject of the action. For example, Customer demo. You can use ## symbols to add additional information from the related entity. For example, Customer demo for opportunity #oppo_opportunityid# closed on #oppo_closed#, displays the opportunity ID and the Date/Time the opportunity was closed. You should use a unique subject to make it easy for users to differentiate a large number of similar records in a list in Sage CRM or in Outlook, if you're using Classic Outlook or Exchange Integration.
Details	The details of the appointment.
Status	The status of the appointment. For example, Pending.
Priority	The priority of the appointment. For example, High.
Private	A private appointment is not displayed in the Team calendar.
Created By	The user who creates the appointment. This is the current user.
Created Date	The date on which the appointment is created. This is the current date.
Percentage Complete	To be completed by user.
Completed Time	To be completed by user.
User	The user for whom the appointment is scheduled. If you don't specify a value in this field, the value in **Get Default User From** is used.

Field	Description
Reminder	The time before the appointment at which a reminder is sent.
Send Reminder Message	The reminder is sent as an email or SMS depending on the priority of the communication. Reminder formats and priorities are specified in the user's **Preferences** tab.
Team	The team for whom the appointment is scheduled. The list displays a list of all teams in the system.
Current Time Offset	The number of minutes between the time at which the action is executed and the time at which the action is recorded. This is useful if users are working in a different time zone to the current time.

Send Email action

By default, emails that are sent using a Send Email workflow action are now automatically filed against the following corresponding entities:

- Person
- Company
- Case
- Opportunity
- Solution
- Custom entity that has Communications

These automatically filed emails can be viewed on the **Communications** tab of the corresponding entity record like any other filed emails.

You can change this default behavior by selecting the **Do not file this communication** check box in the email template used in your workflow. When you select this check box in the email template, emails sent from a workflow using the template are not filed.

Note: After upgrading to Sage CRM 7.3 SP3, the **Do not file this communication** check box is selected for existing Send Email actions in workflows. This check box is cleared by default for new Send Email actions you add to workflows after upgrading.

Sage CRM Connector enhancements

Sage CRM 7.3 SP3 release package includes new *Sage CRM Connector for Sage 200* and *Sage CRM Connector for Sage X3*.

These connectors have the following enhancements:

- **A license key is no longer required**. You don't need to obtain and install a license key to use *Sage CRM Connector for Sage 200* and *Sage CRM Connector for Sage X3* with Sage CRM.
- **Mail Merge update for Sage 200 Integration**. Now to perform a mail merge the Connector uses the built-in Sage CRM 7.3 SP3 Mail Merge feature. Previous versions of the Connector performed mail merges without relying on the Sage CRM functionality.

Issues addressed in Sage CRM 7.3 SP3

After installing Sage CRM 7.3 SP3, 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 SP3 installation.

The status "Cannot reproduce" in the table below means that the issue could not be reproduced on Sage CRM 7.3 SP3. An upgrade to Sage CRM 7.3 SP3 should resolve the issue.

Issue ID	Area	Description	Status
0-166542-QA	.NET API	When a user opened a Company or Person search screen, the first text box on the screen wasn't automatically selected.	This issue is fixed.
0-166134-QA	Calendar	A user was unable to edit recurring appointments.	Cannot reproduce.
0-166369-QA	Calendar	When a user created a new calendar appointment and included a semicolon in the location, an error occurred.	This issue is fixed.
0-166727-QA	Calendar	When a user added an attachment to a task, all task details were erased.	This issue is fixed.
0-166557-QA	Campaign Management	When a user tried to create tasks for each lead in a group, an unexpected event error occurred.	This issue is fixed.
0-167315-QA	Classic Outlook Integration	When an email with multiple addresses in the **To** field was filed using Exchange Integration, the addresses were not separated with semicolons in the filed email.	This issue is fixed.
0-167225-QA	Classic Outlook Integration	An error occurs when a user tries to file an email whose To or CC field contains the user's email address.	This issue is fixed.

Issue ID	Area	Description	Status
0-166301-QA	Classic Outlook Integration	When a user tried to file an email using the Classic Outlook Plugin, the file operation failed.	Cannot reproduce.
0-166322-QA	Classic Outlook Integration / Lite Outlook Integration	When a user filed an email in Microsoft Outlook and then opened the email in Sage CRM, the email body contained incorrect formatting such as extra paragraphs, lines, and spaces.	By design. There is a workaround documented in the Troubleshooting Help.
0-159662-QA	Core Product	There was an issue with metadata refreshes on a multi-server installation.	By design.
0-164234-QA	Core Product	On a Chinese system, the top content on the **Company Summary** page was incorrectly displayed.	This issue is fixed.
0-165874-QA	Core Product	When using the Sage theme, a user was unable to clear the value in the date picker field on a new appointment.	This issue is caused by the behavior of a custom element in Internet Explorer.
0-166558-QA	Core Product	Custom captions were deleted when the user pressed the **Enter** key.	This issue is fixed.
0-167929-QA	Core Product	Component Manager unpacked a .zip file incorrectly.	This issue is fixed.
0-165147-QA	Customization	An internal server error occurred after a system administrator created a new custom menu item based on an ASP page.	This issue is fixed.
0-165611-QA	Deduplication	When a user clicked **Enter Lead Details**, the values entered on the **Deduplication** screen were not inserted into the appropriate fields.	By design.
0-167741-QA	Deduplication	When a user tried to select a person from the deduplication list, an error occurred.	This issue is fixed.

Issue ID	Area	Description	Status
0-165186-QA	Email Client	When a system administrator added some HTML or CSS code to an email template using the **Source** option in the email editor, the changes were not saved in some situations.	By design.
0-166549-QA	Email Client	When a user replied to, or forwarded an email, the **Subject** field was not automatically populated.	This issue is fixed.
0-166509-QA	Exchange Integration	When filing an Outlook email, a user was unable to add a new contact from Outlook to Sage CRM.	Cannot reproduce.
0-166668-QA	Exchange Integration	When using a customized version of Sage CRM and a French SQL server, two way synchronization in Exchange Integration did not work as expected.	Cannot reproduce.
0-167139-QA	Exchange Integration	When using the Lite Outlook Plugin with Exchange Integration, a communication record was not created for an email that was filed against a Case and a Company.	Cannot reproduce.
0-166482-QA	Exchange Integration	When using Exchange Integration, a user was unable to file an email that included an attachment.	Cannot reproduce.
0-166160-QA	Export Data	The CSV file export delimiter specified in **Preferences** was not applied when a user exported a CSV file.	This issue is fixed.
0-163817-QA	Interactive Dashboard	Dashboard gadgets lost their positions when a user navigated away from the dashboard and then returned to the dashboard. This issue occurred when snap was turned off on the dashboard.	This issue is fixed.
0-165358-QA	Interactive Dashboard	A user was unable to link a custom gadget that was based on a saved search.	This issue is fixed.

Issue ID	Area	Description	Status
0-167049-QA	Interactive Dashboard	The position of modified gadgets on the Interactive Dashboard was incorrect.	This issue is fixed.
0-165451-QA	Interactive Dashboard	A user was unable to create a view that linked two custom entities.	This issue is fixed.
0-165739-QA	Leads	When a user navigated away from the **Documents** tab of a Lead record and then returned to the tab, the tab displayed incorrect information.	This issue is fixed.
0-167228-QA	Leads	When a user sent an email, the email was filed twice.	This issue is fixed.
0-165417-QA	Leads	On a Sage 200 Integration, when a user clicked **Add or Find this Company** in the **Lead Company Details** section, the popup screen was not populated with relevant data from the Lead parent window.	This issue is fixed.
0-167421-QA	Mail Merge	Mail merge displayed incorrect date. **Note:** Issue description updated on the 22nd of August 2016.	This issue is fixed.
0-167339-QA	Mail Merge	When a user merged content with a .docx template, the result was saved as a .doc file rather than a .docx file.	This issue is fixed.
0-165280-QA	MailChimp	When a user created a new group based on the Lead entity and sent it to MailChimp, the first name and last name of contacts in the group were not displayed in MailChimp.	This issue is fixed.
0-165022-QA	MailChimp	MailChimp Campaign communication records did not include the user name and displayed the wrong date and time.	This issue is fixed.
0-164962-QA	Mobile	Person and Company **Search Select Advanced** fields didn't work properly on mobile devices.	This issue is fixed.

Issue ID	Area	Description	Status
0-165605-QA	Mobile	On mobile devices, users were able to view options that should be visible to system administrators only.	This issue is fixed.
0-165183-QA	Mobile	When using the Mobile theme, the value of a custom date only field on an Opportunity was not saved.	This issue is fixed.
0-165907-QA	Mobile	When a user selected a new mobile device template from **XSL File Name**, it was not possible to revert to the original selection.	This issue is fixed.
0-166485-QA	Performance / Scalability	When a large number of concurrent users were logged on to Sage CRM, a memory error occurred.	This issue is fixed.
0-165763-QA	Related Entities	A custom menu item that was supposed to open a tab group didn't work. This issue occurred in the Contemporary theme only.	This issue is fixed.
0-165440-QA	Reports	When a user exported a report containing currency fields to an XLSX file, the currency fields were rendered as text in the resulting file.	This issue is fixed.
0-165044-QA	Reports	A user was unable to export a report to Excel over an external connection.	This issue is fixed.
0-164539-QA	Reports	A user was unable to save a cloned report.	This issue is fixed.
0-165258-QA	SCRM IPhone App	A user who was not assigned to a team was unable to log into Sage CRM for Android.	This issue is fixed.
0-166808-QA	Security Management	There was an issue with script tags when creating a new task.	This issue is fixed.

Issue ID	Area	Description	Status
0-167048-QA	Security Management	Users were able to upload HTML documents containing JavaScript code as attachments in Sage CRM.	By design. To prevent users uploading unwanted file types into Sage CRM, go to **<My profile> | Administration | Email and Documents | Documents and Reports Configuration**, and configure **File Extension Restrictions**.
0-167648-QA	Security Management	Dashboards processed certain scripts incorrectly.	This issue is fixed.
0-167651-QA	Security Management	Sage CRM processed certain URL requests incorrectly.	This issue is fixed.
0-166918-QA	Security Management	There was an issue with the filenames of saved PDF reports.	This issue is fixed.
0-165714-QA	User Interface	Using the Contemporary theme, a list of cases for a Company was not correctly displayed.	This issue is fixed.
0-165692-QA	Web to Lead	When a user filled in and submitted a Web to Lead form leaving non-mandatory date fields blank, an error occurred.	This issue is fixed.
0-165350-QA	Web to Lead	Time fields on Web to Lead forms showed the incorrect time. The value in time fields always defaulted to 00:00.	This issue is fixed.
0-167144-QA	Workflow	An error occurred when using workflow with ASP.	This issue is fixed.

Upgrading to Sage CRM 7.3 SP3

You can use the Sage CRM 7.3 SP3 installation package to perform a new installation of Sage CRM or upgrade from a previous version.

You can upgrade to Sage CRM 7.3 SP3 from Sage CRM 7.2 or 7.3 with or without any patch applied.