Sage CRM 2017 R1
Release Notes

Revision: SYS-REA-ENG-2017R1-1.0
Updated: February 2017

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Contents

Overview

This document provides information about enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 2017 R1 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 2017 R1 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 2017 R1, 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	Version
November 2016	eWare.dll	20.17.0.1
	Outlook plugin	20.17.0.1
	Document plugin	20.17.0.1
	CTI plugin	20.17.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2017 R1.

For more information about the software with which Sage CRM 2017 R1 can work and integrate, see the *Sage CRM 2017 R1 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 2017 R1:

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

What's new

Sage CRM 2017 R1 has the following new features:

- **Updated top bar**. The top bar now includes a Favorites list, and the Notifications list is displayed under the Notifications icon rather than at the top of the screen. To open a Find screen, click the arrow beside the **Search** box in the top bar. For more information, see Top bar.
- **New Quick Find**. To perform a search across all entities at once, enter key terms in **Search** on the top bar. For more information, see Quick Find.
- **New calendar**. We have redesigned the Sage CRM calendar to make it modern, intuitive, and easier to use. Please note that year view and month view are not available in the new calendar. For more information, see Calendar.
- **Web-based help**. Help files were removed from the Sage CRM installation package to reduce its size. Now when a user clicks the **Help** button in the product, Sage CRM displays help files hosted on dedicated web servers. To access these help files, client computers must have access to the Internet. You can change this default behavior by installing help files locally on your Sage CRM server. For more information, see Web-based help.
- **Secure email connection**. You can configure Sage CRM to use Transport Layer Security (TLS) to establish a secure connection to a mail server. This lets you use Sage CRM with public mail services that require a secure connection such as Exchange Online, hosted Exchange, and Gmail. For more information, see Secure email connection.
- **Contemporary theme**. The Contemporary theme is the only theme available on a new installation of Sage CRM 2017 R1. When you upgrade Sage CRM to 2017 R1, all themes that existed in the previous version of the product remain available in Sage CRM 2017 R1. Customizations to the Contemporary theme or newly created themes are not supported.
- **50+ customer cases are addressed in this release**. For more information, see Addressed issues.

Top bar

The top bar provides quick access to search, your favorite records, active notifications, recently viewed records, and the **<My Profile>** area.

The top bar has the following elements:

Element	Description
Search box	Use **Search** to quickly search for records in four ways. • Using Quick Find: To perform a search across all entities at once, enter key terms in **Search**. • Using Find screens: To perform a search across a particular entity, click the **Search arrow** and click the entity type. • Using Advanced Find: To perform a complex database search across a particular entity, click the **Search arrow** and click **Advanced Find**. • Using Keyword Search: To search for keywords across specified primary entities, click the **Search arrow** and click **Keyword Search**. You can include wildcard characters to search for a variety of text and characters.
 (Notifications)	Click to display a list of active notifications. Notifications are usually reminders for tasks or appointments, or system alerts set up by you or your system administrator. • The number of notifications you have is displayed above the **Notifications** icon on the top bar. If the total number of notifications is greater than the number of notifications that are displayed on screen when you click the **Notifications** icon, you must dismiss one or more notifications to view the remaining notifications. • Click a notification in the list to open the record, appointment, or task on the main screen. • To dismiss a single notification reminder, click the bin icon beside the notification. • To snooze a single notification reminder, click the clock icon beside the notification and choose a snooze duration. • To dismiss all notifications, click **Dismiss all** or **Snooze all**. • To close the list, click elsewhere on the screen.

Element	Description
(Favorites)	Click to display a list of your favorite Sage CRM records that you can access quickly. You can favorite a company, person, case, opportunity, lead, solution, communication, order, quote, or custom entity record. To add a record to this list, open the record and click the star icon beside the record page title. • Your favorite records are grouped by entity. Click the arrow in the entity header to expand or close the list of records for that entity. • Click a link in the list to open the record on the main screen. • To remove a record from the list, click the star icon beside the record in the list. • To close the list, click elsewhere on the screen.
(Recent)	Click to display a list of records you viewed recently. This list saves company, person, opportunity, quote, order, lead, case, solution, campaign, and group records. • Your recent records are grouped by entity. Click the arrow in the entity header to expand or close the list of records for that entity. • The Recent list displays a limit of 10 records per entity. • The default maximum number of records in the list is 40. To change the maximum number of records displayed in the list, contact your system administrator. • Click a record link in the list to open the record on the main screen. • Click an entity logo to open the entity's Find screen. • To clear the list, click **Clear** at the bottom of the list. • To close the list, click elsewhere on the screen.
(<My Profile>)	Click to view and edit your preferences, access the Administration area (if you have administrative rights in Sage CRM), open the Sage CRM Community web site, or log off Sage CRM.

Quick Find

Using Quick Find

You can enter key terms in **Search** on the top bar to search all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once.

For example, a search for *european software services* returns all records containing the words *european* + *software* + *services* in any text field, email field, or URL field. The words can appear in any order within a record and across more than one field. This is particularly useful for users who need to access Sage CRM information quickly. For example, a customer support user who's on the phone to a customer and needs to reference a specific case record.

- Press **Ctrl** + **s** to jump to **Search**.
- The search starts after you enter two letters in **Search**. Each additional character that you enter refines the search results.
- The search returns a maximum of eight records that best match your criteria.
- Use the up and down arrows and **Enter** to select a returned record.
- When you click a returned record link, the summary screen of that record is displayed.

Configuring Quick Find

Note: The information in this section is for system administrators.

Quick Find allows users search for key terms across single-line text, email address, and URL fields on all company, people, case, opportunity, lead, solution, communication, order, quote, and custom entity records at once. Quick Find gets data from the Quick Find service which runs as a background process. This service first builds an index of all database records and then periodically updates the index to track records that have been added or removed.

1. Click **<My Profile> | Administration | System | Quick Find**.
2. The current status of the Quick Find service is displayed in **Quick Find service status**.
   - The date and time of the last indexing of Sage CRM data is displayed in **Last Quick Find index completed at**.
   - To restart the Quick Find service, click **Restart Quick Find**. You might do this if the service has stopped or if the last indexing occurred more than 10 minutes ago. Restarting the service does not rebuild the index.
3. Click **Change**.
4. Select the entities that are indexed and included in Quick Find. You can exclude an entity from Quick Find to narrow the range of results, reduce the size of the index and RAM requirements, and shorten the time to return results.
5. Click **Save**.

Note: To exclude individual entity fields from Quick Find, click **<My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | Fields**. Click the field that you want to edit and select **Exclude from Quick Find**.

Calendar

- About calendar
- Difference between tasks and appointments
- Approaches to using tasks and appointments
- Setting calendar preferences
- Managing tasks
- Managing appointments

About calendar

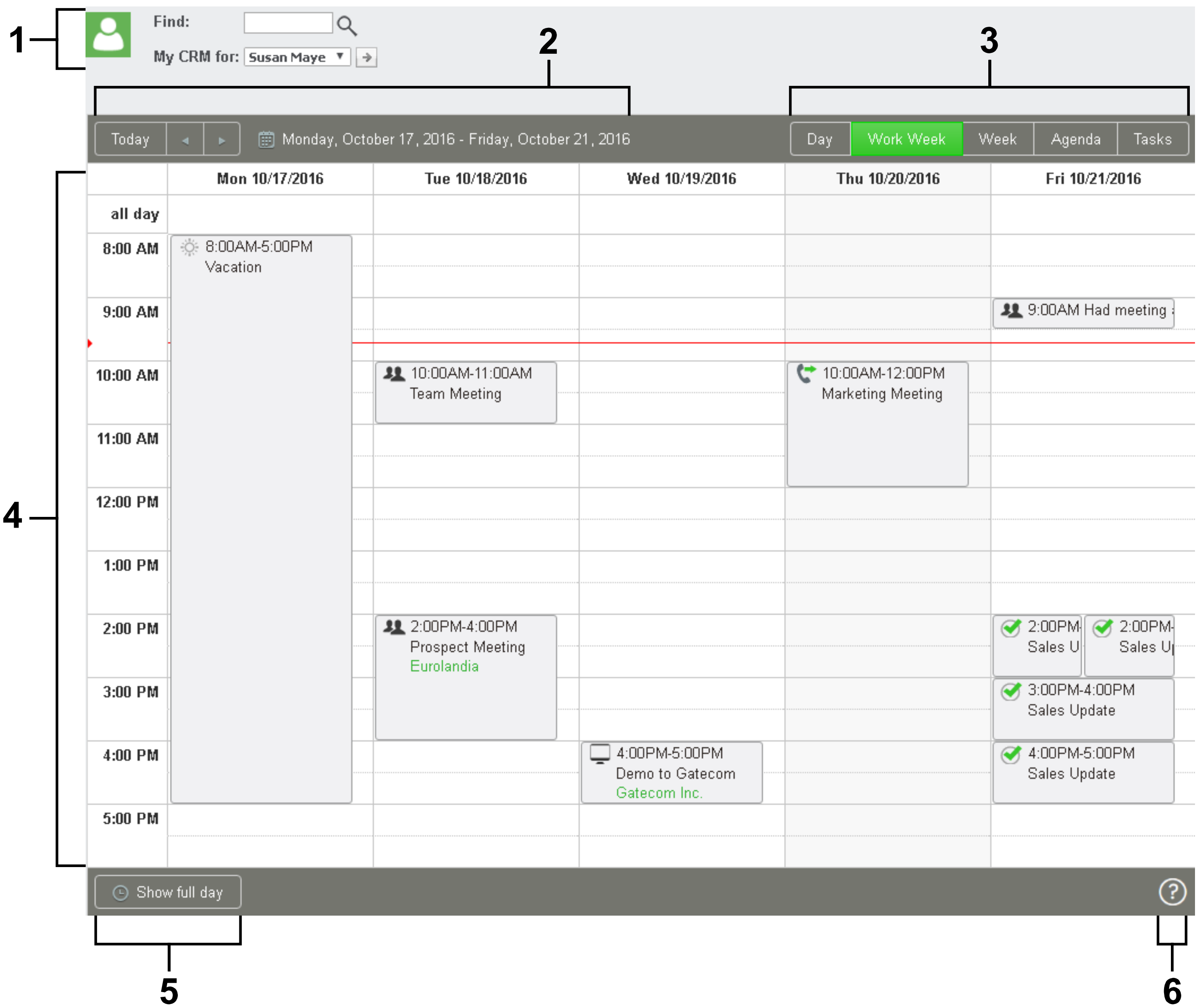
Sage CRM has a built-in calendar where you can manage your meetings and to-do list by creating items called **tasks** and **appointments** . For more information about these items, see Difference between tasks and appointments.

> **Note:** In Sage CRM, appointments and tasks are also called **communications**, because they can capture communications related to specific entity records. When searching for appointments and tasks in Sage CRM, select **Communications** from the search menu.

You can use the calendar in one of the following modes:

- **My CRM mode**. Allows you to work with tasks and appointments assigned to you and other Sage CRM users. To open the calendar in this mode, from the main menu, select **My CRM | Calendar**. When the calendar is this mode, the following icon is displayed in the top left corner:
- **Team CRM mode**. Allows you to work with tasks and appointments assigned to teams. To open the calendar in this mode, from the main menu, select **Team CRM | Calendar**. When the calendar is in this mode, the following icon is displayed in the top left corner:

The calendar has the following elements:


1
2
3
4
5
6
Find:
My CRM for: Susan Maye
Today
Monday, October 17, 2016 - Friday, October 21, 2016
Day
Work Week
Week
Agenda
Tasks
Mon 10/17/2016
Tue 10/18/2016
Wed 10/19/2016
Thu 10/20/2016
Fri 10/21/2016
all day
8:00 AM
9:00 AM
10:00 AM
11:00 AM
12:00 PM
1:00 PM
2:00 PM
3:00 PM
4:00 PM
5:00 PM
8:00AM-5:00PM Vacation
10:00AM-11:00AM Team Meeting
2:00PM-4:00PM Prospect Meeting Eurolandia
4:00PM-5:00PM Demo to Gatecom Gatecom Inc.
10:00AM-12:00PM Marketing Meeting
9:00AM Had meeting
3:00PM-4:00PM Sales Update
4:00PM-5:00PM Sales Update
Show full day

Calendar element	Description
1 (current user or team)	Allows you to select the user or team whose calendar you want to view. When the calendar is in **My CRM** mode, you can use the following elements: • **Find**. Allows you to search for and select the user whose calendar you want to view. Type the partial or full name of the user and click . • **My CRM for**. Select the user whose calendar you want to view. When the calendar is in **Team CRM** mode, you can use the **Team CRM for** list to select the team whose calendar you want to view. To view tasks and appointments for all existing teams, select **All Teams**. To view tasks and appointments not assigned to any team, select **--Unassigned--**. **Note:** To view the calendar of a user or team, you must have sufficient rights in Sage CRM. For more information, contact your system administrator.
2 (navigation buttons and selected day or week)	Allow you to move between days or weeks in the calendar. The way the navigation buttons work depends on the selected calendar view. • **Today**. Click to go to the current day or week. • ◄ (back). Click to go back one day or week. • ► (forward). Click to go forward one day or week. • **<selected day or week>**. Shows the day or week that is displayed in the calendar. Click this element to select the day or week you want to view.

<table>
<tr><th>Calendar element</th><th>Description</th></tr>
<tr><td>3
(calendar views)</td><td>Allow you to switch between the following views.

Day. Displays appointments for the selected day.
Work Week. Displays appointments for business days of the selected week.
Week. Displays appointments for all seven days of the selected week.
Agenda. Displays appointments and scheduled tasks that have a due date set. You can use the following filters above the calendar grid:

Action. Filters calendar items by action type.
Status. Filters calendar items by status.
Type. Filters calendar items by type (task or appointment).

Tasks. Displays scheduled tasks that have a due date set. You can use the following filters above the calendar grid:

Action. Filters tasks by action type.
Status. Filters tasks by status.
Shows Overdue Tasks. Shows overdue tasks for the past 90 days relative to the currently selected day or week. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not Complete or Canceled.

For more information, see Viewing tasks and Viewing appointments.

Tip: When you are in the Work Week or Week view, you can click an appointment to view its detailed summary without leaving the current calendar view.</td></tr>
<tr><td>4
(calendar grid)</td><td>Displays appointments, tasks, or both, depending on the selected calendar view and configured filter settings. The red line indicates the current time of day.</td></tr>
<tr><td>5
(day view)</td><td>Allows you to switch between:

Full day. Shows appointments scheduled for all 24 hours of the selected day or week.
Business hours. Shows appointments scheduled for the business hours of the selected day or week.

For more information on how to set your business hours in the calendar, see Setting calendar preferences.</td></tr>
<tr><td>6
(help button)</td><td>Opens the calendar help.</td></tr>
</table>

Difference between tasks and appointments

This topic describes the features provided by tasks and appointments in the default installation of Sage CRM. The behavior may be different if your system is customized. For more information, contact your system administrator.

Feature	Task	Appointment
Displayed in the Meeting Planner. See Meeting Planner panel.	No	Yes
Shows the Meeting Planner when you create or edit a new item.	No	Yes The Meeting Planner is available for non-recurring appointments only.
Can have attachments.	Yes	No
Can be recurring.	No	Yes
Can include attendees who are not Sage CRM users (external attendees).	No	Yes
Can specify location.	No	Yes
Calendar views where the item is displayed.	• **Agenda** view • **Tasks** view A task linked to an entity record is also displayed on the **Communications** tab of the record.	• **Day** view • **Work Week** view • **Week** view • **Agenda** view An appointment linked to an entity record is also displayed on the **Communications** tab of the record.

Approaches to using tasks and appointments

Sage CRM is a powerful tool for managing your meetings and to-do items. Here you can find some suggestions that you may find useful when working with tasks and appointments. For more information, see Difference between tasks and appointments.

The list of approaches below is not exhaustive - your organizational style and working environment may call for approaches not mentioned here.

Approach	Details
Classic Create appointments for all meetings. Create tasks for all to-do items.	With this approach, you can view and manage all your to-do items in one central location in the calendar (in the **Tasks** or **Agenda** view). However, your colleagues cannot see your tasks in the Meeting Planner. If your colleagues tend to invite you to their meetings often, you may not have any time left to work on your to-do list. Your appointments are shown in the Meeting Planner, so your colleagues cannot create conflicting appointments.
Middle-of-the-road Create appointments for all meetings and critical to-do items. Create tasks for all other to-do items.	This is a more flexible approach that allows you to block time for your critical to-do items in the calendar and in the Meeting Planner. With this approach you can view and manage your meetings and to-do items in the **Agenda** view of the calendar.
Strict time management Create appointments for all meetings and to-do items. Do not use tasks at all.	With this approach, you don't have a separate to-do list, but the times of your meetings and to-do items are blocked in the calendar and in the Meeting Planner. Hence, the chances that you'd be able to work on your to-do items without being distracted by your colleagues are quite high. You can view and manage your meetings and to-do items in the **Agenda** view of the calendar.

Setting calendar preferences

You can configure how the calendar displays information. For example, you can set your business hours, day when your work week begins, date and time format, time zone, and the default initial calendar view that displays when you open the calendar after logon.

To configure the calendar preferences:

1. Go to **<My Profile> | Preferences**.
2. Click **Change**.
3. Configure the fields in the **Date/Time Preferences** panel.

   > **Note:** Some fields in this panel are system-wide. They define how information is displayed in the entire Sage CRM system, not only in the calendar.

4. Click **Save**.

For more information about user preferences, see *User Help* posted on the Sage CRM Help Center.

Managing tasks

- Creating a task
- Editing a task
- Deleting a task
- Viewing tasks
- Managing attached files
- Task fields

For information on how tasks are synchronized when Exchange Integration or Classic Outlook Integration is enabled, see *User Help* posted on the Sage CRM Help Center.

Creating a task

You can use the following methods to create a new appointment:

- Quick method. Allows you to create a task by specifying the task subject only. To specify other settings, you need to edit the task created with this method.
- Normal method. Allows you to create a task by configuring all possible task settings.

Quick method

Note: This method is available in **My CRM | Calendar** only.

This method allows you to create a new task fast, but you can specify the task subject only. Other task fields are automatically populated with the following default values:

- **Start Date/Time:** <Current date and time>
- **Due Date/Time:**<One day ahead of current date and time>
- **Action:** To Do
- **Status:** Pending
- **Priority:** Normal
- **Territory:** <Current user's territory>
- **Team:** <Current user's team>
- **User:** <Current user>

Fields not mentioned above are left blank. To change the default field values, you need to edit the task. For more information, see Editing a task.

To create a task using the quick method:

1. Go to **My CRM | Calendar**.
2. Click the **Tasks** view.
3. Type the task subject in the **Quick Task** text box in the top left corner of the calendar.
4. Click **Add**.

Normal method

This method allows you to configure all possible task settings.

For example, you can specify the task subject and details, times, and action. You can also assign the task to users or teams, select a status and priority, link the task to entity records, configure notifications and other task settings. You can use this method almost anywhere in Sage CRM.

1. In the top right corner of the Sage CRM window, click ⊕.
2. Click **New Task**.
3. Configure the task fields. For more information, see Task fields.
4. Click **Save**.

Tip: You can also create a new task by clicking the **New Task** action button when viewing an entity record. For more information about action buttons, see *User Help* posted on the Sage CRM Help Center.

Editing a task

You can edit an existing task to change its status, priority, subject, details, times, and action. You can also assign the task to users or teams, link the task to entity records, manage files attached to the task, configure notifications and specify other task settings.

1. In the calendar, locate the task you want to edit.

   Tip: To view and filter tasks, you can use the **Tasks** view. For more information, see Viewing tasks.

2. Open the task.
3. Configure the task fields. For more information, see Task fields.
4. Click **Save**.

Deleting a task

Warning: A deleted task cannot be restored. Your system administrator must give you sufficient rights to delete tasks.

When you delete a task, it is deleted together with all attached files. Attachments deleted with the task are also removed from the **Documents** tab of the associated entity records.

1. In the calendar, locate the task you want to delete.

   Tip: To view and filter tasks, you can use the **Tasks** view. For more information, see Viewing tasks.

2. Open the task.
3. Click **Delete**, and then click **Confirm Delete**.

Viewing tasks

- Viewing your tasks
- Filtering tasks by user, action, and status
- Viewing tasks assigned to a team
- Viewing tasks without a due date

Viewing your tasks

Note: This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

1. Go to **My CRM | Calendar**.
2. Click the **Tasks** calendar view. For more information about calendar elements, see About calendar.
3. Optionally, you can filter the tasks in the list:
   - To filter tasks by action, select an action type from **Action** .
   - To filter tasks by status, select a status from **Status**.
   - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
4. To open a task, click the task subject.

Filtering tasks by user, action, and status

You can view tasks assigned to a particular Sage CRM user. You can also filter tasks to display those with specific action or status.

This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

> **Note:** To view tasks assigned to a Sage CRM user, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Go to **My CRM | Calendar**.
2. Click the **Tasks** calendar view.
3. Search for and select the Sage CRM user whose tasks you want to view:
   a. In the **Find** text box in the top left corner, type the name of the user.
   b. If **My CRM for** list is not updated automatically, click to find the user.
   c. Select the user from the **My CRM for** list, and then click . The calendar displays tasks for the user.
4. Optionally, you can filter the tasks in the list:
   - To filter tasks by action, select an action type from **Action** .
   - To filter tasks by status, select a status from **Status**.
   - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
5. To open a task, click the task subject.

Viewing tasks assigned to a team

This method allows you to view only those tasks that have a due date set. To view tasks without a due date, follow the steps in Viewing tasks without a due date.

To view tasks assigned to a team, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Go to **Team CRM | Calendar**.
2. Click the **Tasks** calendar view.
3. In the top left corner, from the **Team CRM for** list, select the team whose tasks you want to view.
   To view tasks for all existing teams, select **All Teams**.
   To view tasks not assigned to any team, select **--Unassigned--**.
4. Optionally, you can filter the tasks in the list:
   - To filter tasks by action, select an action type from **Action** .
   - To filter tasks by status, select a status from **Status**.
   - To display overdue tasks for the past 90 days relative to the selected day or week, select **Show Overdue Tasks**. Overdue tasks are shown in red. These are the tasks whose due date has expired and whose status is not **Complete** or **Canceled**.
5. To open a task, click the task subject.

Viewing tasks without a due date

1. In the top right corner of the Sage CRM window, click in the **Search** box.
2. Click **Communication**.
3. From **Type**, select **Tasks Only**.
4. Specify criteria to search for the tasks you want to view.
5. Click **Find**.
6. In the search results, click the subject of the task you want to view.

Managing attached files

- Attaching files to a task
- Removing an attached file from a task
- Viewing an attached file

Attaching files to a task

> **Note:** You can attach files to saved tasks only. To attach files to a new task, save that task first.

1. Go to **My CRM | Calendar**.
2. Locate and open the task to which you want to attach files. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab.
4. Click **Add File** to locate and select the files you want to attach.

   > **Tip:** To select multiple files, hold down **Ctrl** and click the files.

   Make sure to observe the following parameters set by your system administrator:

   - Maximum file size
   - Allowed file types
   - Maximum number of files you can attach

   If you violate any of these parameters, your files will not be attached. For more information, contact your system administrator.
5. Click **Save**.

All files attached to a task in the context of an entity record are also listed in the **Documents** tab of that record.

Removing an attached file from a task

1. Go to **My CRM | Calendar**.
2. Locate and open the task from which you want to remove an attachment. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab. The number in parenthesis next to the tab name shows the number of files attached to the task.
4. In the **File** column, click the name of the attachment you want to remove.
5. Click **Delete**, and then click **Confirm Delete**.

Viewing an attached file

1. Go to **My CRM | Calendar**.
2. Locate and open the task that contains the attached file you want to view. For more information, see Viewing tasks.
3. In the top left corner of the task, click the **Attachments** tab. The number in parenthesis next to the tab name shows the number of files attached to the task.
4. In the list of attachments, click next to the attachment you want to view.

   Alternatively, click the attached file name, and then click **View Attachment**.

Task fields

When creating or editing a task, you can use fields in the following panels and tabs:

- Regarding panel
- Details panel
- Scheduling panel
- Follow-up panel
- Campaigns panel
- Scheduling Options panel
- Attachments tab

Regarding panel

Use this panel to link your task to entity records.

When a task is linked to an entity record, it is displayed on the **Communications** tab of the record, forming part of the customer history.

Field	Description
Company	Specify the Company record to which you want to link the task.
Person	Specify the Person record to which you want to link the task.
Regarding	Specify the Opportunity, Case, Order, or Quote record to which you want to link the task.
New Company	Click to create a new Company record and link the task to that record.
New Person	Click to create a new Person record and link the task to that record.

Details panel

Use this panel to specify the details of your task.

Field	Description
Action	Select an action about which the task should remind you or other users. The corresponding action icon is displayed for the task in the calendar: • SMS out () • Vacation () • Phone out () • Phone in () • Letter out () • Letter in () • E-mail out () • E-mail in () • Fax out () • Fax in () • Meeting () • Demo () • To do ()
Subject	Type the task subject.
Details	Type the task description.
Status	Select a task status.
Priority	Select a task priority.
Territory	Select a security territory for the task.
Private	Select this check box to hide the task from users who are not added to the **User** field of the Scheduling panel.
Created By	Displays the name of the user who created the task. This option is automatically populated when the task is saved.
Created Date	Displays the date and time when the task was created. This option is automatically populated when the task is saved.

Field	Description
Percent Complete	Displays the completion percentage for the task. If the task is synchronized from Microsoft Outlook, this option displays the value set in Outlook. If the task is not synchronized from Outlook, this option displays one of the following: • **0%** when the task is canceled. • **100%** when the task is complete.
Completed Time	Displays the date and time when the task was completed. When the task status is not **Complete**, this option is blank. When the task status is set to **Complete**, this option is automatically populated with the date and time when the **Complete** status was set.

Scheduling panel

Use this panel to specify task start and due times, assign the task to users, and set up reminders.

Field	Description
Due Date/Time	Specify the date and time by which the task must be completed.
User	Specify the Sage CRM users to whom you want to assign the task. To add users, click in **Search For**. Select the users in the list and click **Add**. To remove users, select the users in the list and click **Remove**. **Tip:** To select multiple users, hold down **Ctrl** and click the users in the list. When you assign a task to more than one user, Sage CRM creates a separate task for each user. Each task is displayed in the calendar of the relevant user.
Start Date/Time	Specify the date and time when the task becomes active.
Onscreen Reminder	Select this check box to enable and configure an onscreen reminder for the task.
Reminder Date/Time	Specify the date and time when the onscreen reminder for the task should display.
Send Reminder Message	When the onscreen reminder is enabled, you can select this check box to receive the reminder messages configured in your user preferences.
Team	Select the team to which you want to assign the task.

Follow-up panel

Use this area to create follow-up items for your task and configure SMS notifications if they are enabled by your system administrator in Sage CRM.

Field	Description
Create Follow-up Task	Select this option to create a new follow-up task based on the current task. The follow-up task is created when you save the current task with this option selected.
Create Follow-up Appointment	Select this option to create a new follow-up appointment based on the current task. The follow-up appointment is created when you save the current task with this option selected.
Create Follow-up Opportunity	Select this option to generate a new opportunity based on the current task. This option is available only when editing an existing appointment.
Send SMS Message Immediately	Select this option to send a notification SMS message to the users added to the **User** option in the Scheduling panel. This option is available only if your system administrator has enabled SMS messaging in Sage CRM.

Campaigns panel

Use this panel to link the task to a marketing campaign wave activity.

By default, this area is hidden. To show this area, click the **Show Campaigns** action button.

Field	Description
Wave Activity	Specify the wave activity to which you want to link the task. This option is read-only if the task was created in the context of a wave activity. Such a task is automatically linked to the wave activity.
Response Type	Allows you to select a response type. This option becomes available once you have specified a wave activity.

Scheduling Options panel

Use this area to create linked tasks for each record in the list of search results.

This area is available when you create a new task from the list of search results after searching for Companies, People, Cases, Leads, or Opportunities.

Field	Description
Number Per Day	Specify the number of tasks to create per each day.
Broker Rule	Allows you to assign the tasks to users or a team. You can select one of the following: • **Round Robin**. Assigns the specified number of tasks to each user in the **User** option. • **Queue**. Assigns the specified number of tasks to the team selected in the **Team** option. The tasks can then be manually distributed between team members. **Note:** For more information about the **User** and **Team** options, see Scheduling panel.
• Mon • Tue • Wed • Thu • Fri • Sat • Sun	Select the days of week when you want to create tasks.

Attachments tab

Use this tab to view, add, and remove task attachments. This tab is available only when you edit a saved task.

Field	Description
Add File	Click this button to browse for a file and attach it to the task.
Drop files here to attach them	Drag and drop your files to this area to attach them to the task. This area is available in some browsers only.
Owner	Allows you to filter the attached files by a particular owner. Select the owner whose files you want to view from the list, and then click **Filter**. If the owner is not listed, use the search box to look for the owner and add him or her to the list.

After you click the name of an attached file in the list, the **Attachments** tab displays the following panels:

Panel	Description
For	Provides information about any records to which the attached file is linked. • **Company**. Shows the Company record to which the file is linked. • **Person**. Shows the Person record to which the file is linked. • **Regarding**. Shows the Opportunity, Case, Order, or Quote record to which the file is linked.
Details	This panel has the following elements: • **Type**. Specify the attachment type. • **Category**. Specify the attachment category. • **Status**. Specify the attachment status. • **Owner**. Specify the attachment owner. • **Team**. Specify the team that owns the attachment. • **Description**. Enter attachment description.

Managing appointments

- Creating an appointment
- Editing an appointment
- Configuring recurrence for an existing appointment
- Deleting an appointment
- Viewing appointments
- Managing external attendees
- Appointment fields

For information on how appointments are synchronized when Exchange Integration or Classic Outlook Integration is enabled, see *User Help* posted on the Sage CRM Help Center.

Creating an appointment

You can use the following methods to create a new appointment:

- Quick method. Allows you to create an appointment by specifying the appointment subject, start date and time, and end date and time. You can use this method in the following calendar views only: **Day**, **Week**, **Work Week**. The Meeting Planner is not available with this method. Also, when creating an appointment, you cannot link it to any entity records.
- Normal method. Allows you to create an appointment by configuring all possible appointment settings. With this method, you can also use the Meeting Planner to check the availability of the appointment attendees who are Sage CRM users. You can use the normal method almost anywhere in Sage CRM.

For more information about the Meeting Planner, see Meeting Planner panel.

Quick method

> **Note:** This method is available in **My CRM | Calendar** only.

This method allows you to create a new appointment fast, but you can specify the following settings only:

- Appointment subject
- Start date and time
- End date and time

Other appointment fields are automatically populated with the following default values:

- **Action:** Meeting
- **Status:** Pending
- **Priority:** Normal
- **Territory:** <Current user's territory>
- **Team:** <Current user's team>
- **User:** <Current user>

To change the default settings, you need to edit the appointment. For more information, see Editing an appointment.

To create an appointment using the quick method:

1. Go to **My CRM | Calendar**.
2. Open one of the following calendar views:
    - **Day**
    - **Work Week**
    - **Week**

For more information, see About calendar.

3. Double-click anywhere in the calendar grid.
4. In the dialog box that opens, use the following fields
    - **Subject**. Type an informative subject with which you want to identify your appointment in the calendar.
    - **Start Time**. Enter the start date and time for your appointment.
    - **End Time**. Enter the end date and time for your appointment.
5. Click **Save**.

Normal method

When creating an appointment using the normal method, you can configure all possible appointment settings.

For example, you can specify the appointment subject, details, times, action, and location. You can also add entire teams or internal attendees who are Sage CRM users. You can select a status and priority, link the appointment to entity records, and configure notifications, recurrence, and other appointment settings.

> **Note:** You can add external attendees who are not Sage CRM users only after saving your appointment.

To create an appointment using the normal method:

1. In the top right corner of the Sage CRM window, click ⊕.
2. Click **New Appointment**.
3. Configure the appointment fields. For more information, see Appointment fields.

   When setting the appointment time, you can use the Meeting Planner panel to check the availability of internal appointment attendees and avoid possible conflicts. The Meeting Planner doesn't show the availability of external appointment attendees. The Meeting Planner is not available for recurring appointments.

4. Click **Save**.

   Now you can add external attendees to your appointment, if necessary. For more information, see Adding external attendees to an appointment.

Editing an appointment

You can edit an existing appointment to change its status, priority, subject details, type, recurrence, add or remove internal and external attendees or teams, and configure other appointment settings.

1. In the calendar, locate the appointment you want to edit.

   Tip: To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.

2. Open the appointment.
3. Configure the appointment fields. For more information, see Appointment fields.

   When setting the appointment time, you can use the Meeting Planner panel to check the availability of the internal appointment attendees and avoid possible conflicts. The Meeting Planner is not available for recurring appointments.

4. Click **Save**.

Configuring recurrence for an existing appointment

You can add, edit, or delete recurrence for an existing appointment. Note that you can configure recurrence only for those appointments whose status is **Pending**, **In Progress**, or **--None--**.

1. In the calendar, locate and open the appointment for which you want to configure recurrence.

   > **Tip:** To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.

2. In the Scheduling panel, click **Recurrence**.
3. Configure the recurrence settings. For more information, see Communication Recurrence window. To delete recurrence, click **Delete**.
4. Click **Save**.

   In the calendar views, recurring appointments are marked with the following icon: .
   The Meeting Planner is not available for recurring appointments.

Deleting an appointment

Warning: A deleted appointment cannot be restored. Your system administrator must give you sufficient rights to delete appointments.

1. In the calendar, locate the appointment you want to delete.

   Tip: To view and filter appointments, you can use the **Agenda** view in the calendar. For more information, see Viewing appointments.

2. Open the appointment.
3. Click **Delete**, and then click **Confirm Delete**.

Viewing appointments

- Viewing your appointments
- Filtering appointments by user, action, and status
- Viewing appointments for a team

Viewing your appointments

1. Go to **My CRM | Calendar**.
2. Click one of the following calendar views:
   - **Day**
   - **Work Week**
   - **Week**
3. Use the navigation buttons to select the day or date range for which you want to view appointments. For more information about calendar views and navigation buttons, see About calendar.

   Each appointment is marked with an icon indicating its action. For more information about these icons, see Details panel. Recurring appointments are marked with .
4. To open an appointment, double-click it.

Tip: When you are in the **Work Week** or **Week** view, you can click an appointment to view its detailed summary without leaving the current calendar view.

Filtering appointments by user, action, and status

You can view appointments assigned to a particularSage CRM user. You can also filter appointments to display those with specific action or status.

> **Note:** To view appointments assigned to another Sage CRM user, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Go to **My CRM | Calendar**.
2. Click the **Agenda** calendar view. For more information about calendar elements, see About calendar.
3. Search for and select the Sage CRM user whose appointments you want to view:
   a. In the **Find** text box in the top left corner, type the name of the user.
   b. If **My CRM for** list is not updated automatically, click to find the user.
   c. Select the user from the **My CRM for** list, and then click .
4. From the **Type** option, select **Appointments Only**. The calendar displays appointments for the user.

   Recurring appointments are marked with .
   For more information, see Configuring recurrence for an existing appointment.
5. If necessary, filter the appointments:
   - To filter appointments by action, select the action type from **Action** .
   - To filter appointments by status, select the status from **Status**.
6. To open an appointment, click the appointment subject.

Viewing appointments for a team

To view appointments assigned to a team, you need to have sufficient rights in Sage CRM. For more information, contact your system administrator.

1. Go to **Team CRM | Calendar**.
2. Click the **Agenda** calendar view. For more information about calendar elements, see About calendar.
3. In the top left corner, from the **Team CRM for** list, select the team whose appointments you want to view.
   To view appointments for all existing teams, select **All Teams**.
   To view appointments not assigned to any team, select **--Unassigned--**.
4. From the **Type** option, select **Appointments Only**. The calendar displays appointments for the team.

   Recurring appointments are marked with .
   For more information, see Configuring recurrence for an existing appointment.
5. Optionally, you can filter the appointments in the list:
   - To filter appointments by action, select the action type from **Action** option.
   - To filter appointments by status, select the status from **Status**.
6. To open an appointment, click the appointment subject in the **Subject** column.

Managing external attendees

You can add external attendees to a saved appointment. External attendees are people who are not Sage CRM users. You can add only those external attendees for whom Person records exist in Sage CRM.

- Adding external attendees to an appointment
- Removing external attendees from an appointment

Adding external attendees to an appointment

> **Note:** You can add external attendees to saved appointments only. The external attendees must exist in Sage CRM as Person records.

1. Go to **My CRM | Calendar**.
2. Locate and open the appointment to which you want to add external attendees.
   For more information, see Viewing appointments.
3. In the top left corner of the appointment, click the **External Attendees** tab.
4. Find and select the external attendees you want to add:
   a. Click **Add Attendees to Appointment**.
   b. Specify criteria to look for the Person records that represent the external attendees you want to add.
   c. Click **Find** .
   d. In the **Select** column of the search results list, select the check boxes next to the Person records you want to add.
   e. Click **Add Attendees to Appointment**.

   When you add external attendees, the appointment is displayed on the **Communications** tab of the Person records representing the external attendees.

Removing external attendees from an appointment

1. In Sage CRM, go to **My CRM | Calendar**.
2. Locate and open the appointment from which you want to remove external attendees. For more information, see Viewing appointments.
3. In the top left corner of the appointment, click the **External Attendees** tab.
4. In the **Remove** column, select the check boxes next to the external attendees you want to remove.
5. Click **Remove Selected Attendees from Appointment**.

   When you remove external attendees, the appointment is removed from the **Communications** tab of the Person records representing the external attendees.

Appointment fields

When creating or editing an appointment, you can use fields in the following panels and tabs:

- Regarding panel
- Details panel
- Scheduling panel
- Meeting Planner panel
- Follow-up panel
- Campaigns panel
- External Attendees tab

Regarding panel

Use this panel to link your appointment to entity records.

When an appointment is linked to an entity record, it is displayed on the **Communications** tab of the record, forming part of the customer history.

Field	Description
Company	Specify the Company record to which you want to link the appointment.
Person	Specify the Person record to which you want to link the appointment.
Regarding	Specify the Opportunity, Case, Order, or Quote record to which you want to link the appointment.
New Company	Click to create a new Company record and link the appointment to that record.
New Person	Click to create a new Person record and link the appointment to that record.

Details panel

Use this panel to specify the details of your appointment.

Field	Description
Action	Select an action about which the appointment should remind you or other users. The corresponding action icon is displayed for the appointment in the calendar: • SMS out () • Vacation () • Phone out () • Phone in () • Letter out () • Letter in () • E-mail out () • E-mail in () • Fax out () • Fax in () • Meeting () • Demo () • To do ()
Subject	Type the appointment subject.
Location	Type the appointment location. You can add a resource user, for example, London meeting room. If you've already typed some text in this option, add the resource user after the text. Use a semicolon as a separator.
Details	Type the appointment details.
Status	Select an appointment status.
Priority	Select an appointment priority.
Territory	Select a security territory for the appointment.
Private	Select this check box to hide the subject and details of the appointment from users who are not added to the **User** option of the Scheduling panel. The appointment time is displayed as busy (blocked) to such users.
Created By	Displays the name of the user who created the appointment. This option is automatically populated when the appointment is saved.
Created Date	Displays the date when the appointment was created. This option is automatically populated when the appointment is saved.

Field	Description
Percent Complete	Displays the completion percentage for the appointment: • **0%** when the appointment is canceled. • **100%** when the appointment is complete.
Completed Time	Displays the date and time when the appointment was completed. When the appointment status is not **Complete**, this option is blank. When the appointment status is set to **Complete**, this option is automatically populated with the date and time when the **Complete** status was set.

Scheduling panel

Use this panel to specify appointment times, appointment attendees, schedule your appointment, configure recurrence, and set up reminders.

Field	Description
Date/Time	Specify the start date and time of the appointment.
End Time	Specify the end and time of the appointment.
All day event	Select this option to make the appointment an all-day event. When selected, this option overrides the start and end times in the **Date/Time** and **End Time** options.
User	Specify appointment attendees. In this option, you can specify only Sage CRM users. To add or remove attendees who are not Sage CRM users, go to the External Attendees tab. For more information, see Adding external attendees to an appointment and Removing external attendees from an appointment. To add users, click in **Search For**. Select the users in the list and click **Add**. To remove users, select the users in the list and click **Remove**. **Tip:** To select multiple users, hold down **Ctrl** and click the users in the list. The appointment appears in the calendar of each user added to the **Users** option.
Reminder	Configure an onscreen reminder for the appointment. Select when the reminder displays before the appointment. To disable the reminder, select **Don't remind me**. When an onscreen reminder is enabled, you can also select **Send Reminder Message** to receive the reminder messages configured in your user preferences.
Team	Select the team you want to participate in the appointment.
Recurrence	Click this option to configure or delete recurrence for the appointment. For more information, see Communication Recurrence window. When recurrence is set up for the appointment, the recurrence details are displayed under the **Recurrence** option. **Note:** The default maximum number of occurrences is 200. If you exceed the maximum number of occurrences, an error message is displayed and you can't save the appointment.

Communication Recurrence window

Use this window to configure recurrence for the appointment.

<table>
<tr><th>Panel</th><th>Description</th></tr>
<tr><td>Recurrence Pattern</td><td>Specify the frequency with which you want the appointment to recur.</td></tr>
<tr><td>Daily Pattern</td><td>Specify the time of day when you want the appointment to start and finish.
If you select Occurs Once At, only one appointment is created for each day set up in the Recurrence Pattern panel.
If you select Occurs Every, a separate appointment is created for each day. Use the Duration panel to specify the date range in which you want the appointments to recur.
Note: When Exchange Integration is enabled, the Occurs Every option is not available.</td></tr>
<tr><td>Duration</td><td>Set the date range in which you want the appointment to recur.</td></tr>
</table>

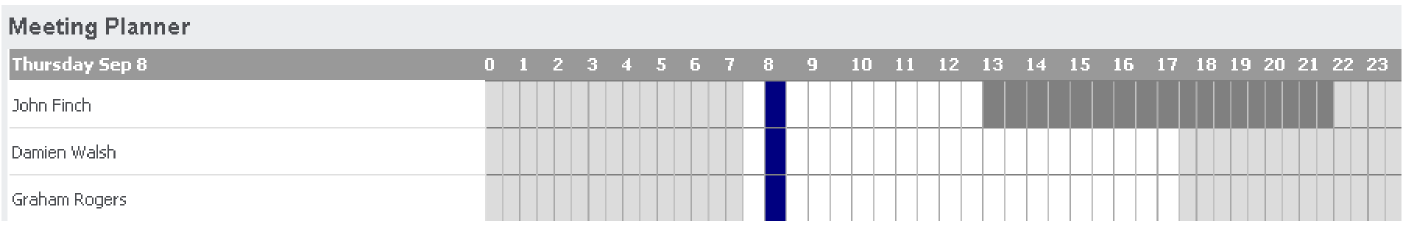
Note: The default maximum number of appointment occurrences is 200. If you exceed this number, an error message is displayed and you can't save the appointment.

Meeting Planner panel

> **Note:** This panel is available only when you create or edit a non-recurring appointment.

Provides a free/busy grid that shows the availability of the appointment attendees added to the **User** option in the Scheduling panel. The Meeting Planner is similar to the Scheduling Assistant in Microsoft Outlook. You can use the Meeting Planner to avoid conflicting events when planning appointments.

Free office hours are shown in white, busy hours are displayed in dark gray, out of office hours are displayed in light gray. Any conflicts with the current appointment are highlighted in red.



In this example, Damien Walsh and Graham Rogers are free from 7.30 until 17.30 and John Finch is busy from 13.00 until 22.00.

> **Tip:** You can use the Meeting Planner to set the start and end time of an appointment. In the free/busy grid, click the start time, and then click the end time. The area between the start and end time is marked in dark blue, indicating the appointment hours.

Follow-up panel

Use this panel to create follow-up items for your appointment and configure SMS notifications if they are enabled in Sage CRM.

Field	Description
Create Follow-up Task	Create a new follow-up task based on the current appointment. The follow-up task is created when you save the current appointment with this option selected.
Create Follow-up Appointment	Create a new follow-up appointment based on the current appointment. The follow-up appointment is created when you save the current appointment with this option selected.
Create Follow-up Opportunity	Create a new opportunity based on the current appointment. This option is available only when editing an existing appointment.
Send SMS Message Immediately	Send a notification SMS message to the users added to the **User** option in the Scheduling panel. This option is available only if your system administrator has enabled SMS messaging in Sage CRM.

Campaigns panel

Use this panel to link the appointment to a marketing campaign wave activity.

By default, the **Campaigns** panel is hidden. To display this panel, click the **Show Campaigns** action button in the appointment.

Field	Description
Wave Activity	Specify the wave activity to which you want to link the appointment. This option is read-only if the appointment was created in the context of a wave activity. Such an appointment is automatically linked to the wave activity.
Response Type	Select a response type. This option becomes available once you have specified a wave activity.

External Attendees tab

> **Note:** This tab is available only when you view a saved appointment.

Use this tab to view, add, and remove external attendees. You can add only those external attendees whose details are entered into Sage CRM as Person records.

When the appointment has any external attendees, the following icon is displayed next to the tab name:

When Exchange Integration is enabled, the **External Attendees** tab shows the response to the appointment invitation from Exchange Server.

For more information about working with external attendees, see Managing external attendees.

Action button	Description
Add Attendees to Appointment	Allows you to search for, select, and add external attendees to the list. For more information, see Adding external attendees to an appointment When you click this button, the **Find and Add External Attendees** tab opens. Use the **Find** panel on this tab to specify search criteria for the Person records you want to add as external attendees to the appointment. Click **Find** to start your search. When your search completes, select the check boxes in the **Select** column next to the records you want to add as external attendees, and then click **Add Attendees to Appointment**.
Remove Selected Attendees from Appointment	Removes selected external attendees from the list. For more information, see Removing external attendees from an appointment.

Web-based help

- Installing help files locally
- Switching between local and web help

Installing help files locally

You need to install help files on your Sage CRM server if:

- Client computers in your environment have limited or no access to the Internet.
- You want to customize the Sage CRM help files.

If your environment includes multiple Sage CRM servers, you need to install help files only on one of them. Other Sage CRM servers will automatically get access to the installed help files.

After installing help files locally, you can always switch back to using help hosted on web servers.

To install help files:

1. Download the Sage CRM 2017 R1 Help Setup file.

   The Help Setup file is available on the Sage CRM Partner Community. The file name has the following format:

   SageCRM_<VersionNumber>_HelpSetup.exe

   where <VersionNumber> is the Sage CRM version the setup is for.

2. Copy the Help Setup file to the Sage CRM server on which you want to install help.
3. Run the file and complete the Setup Wizard. You will be prompted to enter administrative credentials for the Sage CRM database.

Sage CRM help files are installed to the following locations:

Help	Location on a Sage CRM server
User Help	• On a 32-bit system: **%ProgramFiles%\Sage\CRM\<InstallName>\WWWRoot\Help\<Language>\Main Menu** • On a 64-bit system: **%ProgramFiles(x86)%\Sage\CRM\<InstallName>\WWWRoot\Help\<Language>\Main Menu**
System Administrator Help	• On a 32-bit system: **%ProgramFiles%\Sage\CRM\WWWRoot\Help\<Language>\Administration** • On a 64-bit system: **%ProgramFiles(x86)%\Sage\CRM\WWWRoot\Help\<Language>\Administration**

In the table above:

- **<InstallName>** is the installation name you specified when installing Sage CRM.
- **<Language>** is the language of the help files, for example, EN, DE, ES, or FR.

Local help files include context-sensitive help, which users can access by clicking the **Help** button in the Sage CRM UI. The language in which context-sensitive help is displayed depends on the user's language preference. For more information, see *System Administrator Help* posted on the Sage CRM Help Center. If the help file in the user's chosen language has not been installed, help is displayed in system default language.

After installing help files, you can edit the files or replace them completely.

Sage CRM help is created using Madcap Flare. If you have the expertise and licenses to create a customized help project which mirrors the Sage CRM help file structure, you can replace parts or all of the standard Sage CRM help with your customized project. Alternatively, you can create help using the help authoring tool of your choice and replace part or all of the standard Sage CRM help.

If you use a customized project, ensure the following:

- The default initial file for the *User Help* and *System Administrator Help* is named **Default.htm** and located in the corresponding folder (**Main Menu** or **Administration**) specified in the table above. Sage CRM looks for that file if no context-sensitive link has been set.
- The help content files are HTM files located in the corresponding folder (**Main Menu** or **Administration**). Only files meeting these criteria can be selected from the Inline Translation tool used to set up the context-sensitive links. For more information, see *System Administrator Help* posted on the Sage CRM Help Center.

> **Note:** We recommend that you back up the local help files before modifying them. Sage CRM is delivered with new help files and context-sensitive links with each release. Custom local help files and links are preserved on upgrade.

Switching between local and web help

When help files are installed locally on your Sage CRM server, you can select which help files are displayed to users and system administrators when they click the **Help** button.

Possible options are:

- Local help files installed on your Sage CRM server.
- Help files hosted on dedicated web servers.

To select which help files are displayed:

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | System | System Behavior**.
3. Click **Change**.
4. In **Use local help files**, select a value:
   - **Yes**. Displays help files installed on the Sage CRM server.
   - **No**. Displays help files hosted on dedicated web servers. When this value is selected, the computers from which users and system administrators access help files must be connected to the Internet.

   Use local help files is available only when help files are installed on your Sage CRM server. For more information, see Installing help files locally.
5. Click **Save**.

Secure email connection

Note: The information in this section is for system administrators.

There are some points to consider when using TLS with Sage CRM:

- You need the connection details for your mail server. Default SMTP over TLS details for Exchange Online and Gmail are as follows:
  - Exchange Online: smtp.office365.com:587
  - Gmail: smtp.gmail.com:465
- If you're using Gmail, you might need to generate a per-application password to use SMTP. See https://security.google.com/settings/security/apppasswords.
- If you're using Exchange Online, consider the daily send limits.
- Ensure your antivirus software and firewall allow outbound SMTP from the CRM web server.

To use TLS with standard Sage CRM email:

1. Click **<My Profile> | Administration | Email and Documents | Email Configuration**.
2. Click **Change**. The Email/SMS settings screen opens.
3. Enter your SMTP username and password.
4. Select **Use TLS for SMTP** to establish a connection to the mail server using TLS.
5. Enter your SMS domain name and SMTP server for SMS messaging.
6. Select **Use TLS for SMS** to send SMS messages using TLS.
7. Click **Save**.

To use TLS with Email Management:

1. Configure TLS for standard email. See the steps above.
2. Click **<My Profile> | Administration | Email And Documents | Email Management Server Options**.
3. Click **New**. You must set up options on the outbound email mailbox first. For more information, see *Configuring Email Management* in the *System Administrator Help*.
4. Select **Use TLS for POP** to receive emails from the POP email account using TLS.
5. Select **Use TLS for SMTP** to send emails to the SMTP server using TLS.
6. Click **Save**.

Addressed issues

This section lists issues addressed in Sage CRM 2017 R1.

The status **Cannot reproduce** in the table below means that the issue could not be reproduced on Sage CRM 2017 R1. Install Sage CRM 2017 R1 to resolve the issue.

> **Note:** After you install Sage CRM 2017 R1, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard will work correctly.

Issue ID	Area	Description	Status
0-168249-QA	Advantage ProSeries Integration	When using the Contemporary theme, users experienced the following issues: • Some Sage CRM screens were displayed as blank pages. • Information was missing from some Sage CRM screens. • In some situations, Sage CRM tabs were missing.	This issue is fixed.
0-167008-QA	Cases	When a user viewed a case, the top part of the Sage CRM window showed details of a different case.	This issue is fixed.
0-167739-QA	Comms/Diary	Changing the **From** field value in the default email template changed the **From** field value in existing communications.	This issue is fixed.
0-167786-QA	Comms/Diary	Appointments assigned to teams disappeared from **Team CRM | Calendar** after syncing data from Sage CRM to Microsoft Outlook.	This issue is fixed.

Issue ID	Area	Description	Status
0-167964-QA	Comms/Diary	**Team CRM | Calendar** didn't show tasks that were not assigned to any users.	This issue is fixed.
0-165684-QA	Comms/Diary	The **cmli_comm_accountid** field in the database was not populated with the correct value. This issue occurred on integrations with Sage 200.	This issue is fixed.
0-167839-QA	Comms/Diary	When a user added an attachment to a closed task, some information (such as related company, person, and task details) was unexpectedly removed from the task.	Cannot reproduce.
701-167372-QA	Component Management	When a user opened a company and clicked the **Map** tab, an error occurred. The Search feature was not available.	Cannot reproduce.
0-166214-QA	Component Management	When the Mapping Component was installed, the map failed to show companies, opportunities, and leads.	By design. Make sure you center the map properly and configure the distance settings on the map.
0-167732-QA	Component Management	When the Mapping Component was installed, the location of a particular company wasn't shown automatically on the map.	By design. To view the location of a company on the global map, click **Search**.
0-165732-QA	Core Product	The `#recordanchor#` and `#recordanchorend#` parameters failed to work as expected in email templates.	This issue is fixed.
0-166966-QA	Core Product	When a user entered some text into an search select advanced (SSA) field and clicked the magnifying glass icon, the drop-down list that opened was positioned incorrectly.	This issue is fixed.

Issue ID	Area	Description	Status
0-165929-QA	Core Product	Users could not log on to Sage CRM.	This issue is fixed.
0-165011-QA	Core Product	The `defaultvalue` parameter used in the OnCreate script failed to set the default time correctly. This issue was observed in the **Set Column Value** workflow action.	This issue is fixed.
0-165868-QA	Core Product	The incorrect document processing time was shown in the list of opportunities.	This issue is fixed.
0-165587-QA	Core Product	Sage CRM did not display custom error pages to users.	This issue is fixed.
0-166596-QA	Customization	When a user clicked a custom tab group in the main menu, the top part of the Sage CRM window displayed incorrect information.	This issue is fixed.
0-168387-QA	Customization	When a user tried to open a communication on a company's **Communications** tab, Sage CRM displayed a message stating that the communication record was locked by the current user.	This issue is fixed.
0-165795-QA	Customization	A custom button named **Convert to ERP Order** was missing in Google Chrome.	Cannot fix. This behavior occurs because of the error condition in QuoteSummary.js which is a custom file.
0-165522-QA	Customization	The `CRM.Button` method failed to highlight the required tab.	This issue is fixed.
0-167884-QA	Customization	The default value was ignored in a list implemented using a .NET DLL.	This issue is fixed.
0-167278-QA	Customization Wizard	Field codes were shown instead of translations in email templates.	This issue is fixed.

Issue ID	Area	Description	Status
0-167882-QA	Customization Wizard	A message stating that functionality was not available appeared when a user expanded a notification for a task linked to a custom entity, clicked **View Original**, and then clicked **Save**.	This issue is fixed.
0-167798-QA	Database	In **<My Profile> | Administration | System | Database**, it was not possible to specify a port number that included more than four digits.	This issue is fixed.
0-167253-QA	Email Client	The default email address in the **From** field of the email template wasn't replaced with the actual email address of the selected user alias.	This issue is fixed.
0-167204-QA	E-Marketing (Swiftpage)	When Swiftpage E-Marketing was enabled, wrong values were added from selection fields into e-marketing emails.	Cannot reproduce.
0-167890-QA	Groups/Target Lists	Using an apostrophe (') in the name and description of a group caused SQL Server errors.	This issue is fixed.
0-167334-QA	Groups/Target Lists	An info manager was not able to grant access to a group to all users.	By design. This functionality is available to system administrators only.
0-167213-QA	Groups/Target Lists	Group descriptions were lost after upgrading Sage CRM.	This issue is fixed.
0-167952-QA	Interactive Dashboard	Search select advanced (SSA) fields were not available on gadgets based on custom entities.	This issue is fixed.
0-165063-QA	Interactive Dashboard	The interactive dashboard required users to log on after upgrading Sage CRM.	Cannot reproduce.
0-165449-QA	Interactive Dashboard	A list gadget based on a report failed to work.	By design.

Issue ID	Area	Description	Status
0-166184-QA	Interactive Dashboard	My Calendar gadget on the Interactive Dashboard showed the incorrect time for appointments.	Cannot reproduce.
0-165486-QA	Interactive Dashboard	When a user clicked a case link on the interactive dashboard, the top part of the Sage CRM window showed details of a different case.	Cannot reproduce.
0-168324-QA	Leads	The Contains condition didn't match a lead record to an existing company record.	Documentation updated. The documentation provided inaccurate description of the Contains condition in the Dedupe Rule option.
0-167907-QA	Lite Outlook Plugin	When a user filed an email against a Company record and a Person record, duplicate communication entries were shown for the Person record.	This issue is fixed.
0-165261-QA	Lite Outlook Plugin	A user was unable to file an email against two cases.	This issue is fixed.
0-167587-QA	MailChimp	Communication records weren't created for a MailChimp campaign.	This issue is fixed.
0-166123-QA	Mail Merge	When a user created a merged document, an existing .docm template was missing from the list of Word documents.	This issue is fixed.
0-166272-QA	Mail Merge	Mail merge failed to work when the operating system locale was set to Chinese on the Sage CRM server.	This issue is fixed.
0-168230-QA	Mobile	The **New** button was available to users who didn't have rights to create new records.	This issue is fixed.

Issue ID	Area	Description	Status
0-168078-QA	Mobile	In the mobile version of Sage CRM, a restrictor was not applied to search select advanced (SSA) fields.	By design. Documentation has been updated. Whenever you are creating a new SSA field with restrictions, you must manually update the file **WWWRoot\mobile\lib\ssa\ssarestrictors.js** to reflect the restriction.
0-168077-QA	Mobile	Search select advanced (SSA) fields on mobile screens unexpectedly shifted.	This issue is fixed.
0-167948-QA	Mobile	When the **Territory** option was configured as read-only for the person entity, in some situations users received a misleading error message stating that a value must be set in that option.	This issue is fixed.
0-167985-QA	Mobile	The **Opportunity: Assigned To** field (oppo_assigneduserid) didn't work as expected on mobile screens when it was set to read-only using the Create Script feature.	Cannot reproduce.
0-167711-QA	Outlook Integ - Classic	Some meetings were not synched from Microsoft Outlook to Sage CRM.	This issue is fixed.
0-168007-QA 0-167917-QA	Reports	When a user exported a report to Microsoft Excel, some numeric fields were exported incorrectly. As a result, it was not possible to perform arithmetic operations on the field values in Excel.	This issue is fixed.

Issue ID	Area	Description	Status
0-168345-QA	Reports	Sage CRM reports used incorrect SQL query to return dates. This issue was observed only on French-language versions of Microsoft SQL Server.	This issue is fixed.
0-167838-QA	Reports	When a user exported a large report to Microsoft Excel and then opened the generated file, Excel displayed a message stating that the file is corrupted.	This issue is fixed.
0-168009-QA	Reports	When a user exported a report to Microsoft Excel, some date fields were exported incorrectly. As a result, it was not possible to apply filters to the field values in Excel.	This issue is fixed.
695-167074-QA	Sales Forecasting	The **fcst_month** value was not updated in the Sage CRM database.	By design.
0-165752-QA	SData Provider	When company data was synched from OfficeLine to Sage CRM, the company email address wasn't added to the company record in Sage CRM.	Cannot reproduce.
0-167156-QA	Soap Integration	When a user tried to save a record in Sage CRM during metadata refresh, an error occurred.	By design.
0-165803-QA	User Interface	The mail merge filter was erroneously set to company rather than custom entity.	This issue is fixed.
0-167905-QA	User Interface	It was not possible to change a date field value in Advanced Find.	This issue is fixed.
0-165606-QA	User Interface	When Sage CRM was configured to open new email in a popup window, the **Send Email** button was hidden because of the default window size.	This issue is fixed.
0-164997-QA	User Management	An error occurred when a system administrator tried to re-enable a disabled resource user.	This issue is fixed.

Issue ID	Area	Description	Status
0-162723-QA	Workflow	When a system administrator edited a workflow and then clicked **Administration**, an error message appeared.	Cannot reproduce.

Upgrading

You can use the Sage CRM 2017 R1 installation package to perform a new installation of Sage CRM or upgrade from a previous version.

You can upgrade to Sage CRM 2017 R1 from Sage CRM 7.3 SP3, 7.3 SP2, 7.3 SP1, 7.3, and 7.2.