



# Sage CRM 2017 R2

## Software Requirements and Mobile Features

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# Contents

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- Software requirements ..... 4**
- Operating systems ..... 5
  - Sage CRM server ..... 5
  - Client computer ..... 5
- Database server ..... 6
- Web browsers ..... 6
- Mobile devices ..... 7
- Mobile apps ..... 7
- Document Drop plugin ..... 8
- Microsoft Exchange ..... 8
- Outlook plugins ..... 9
- Citrix XenApp ..... 10
- Remote Desktop Services (formerly Terminal Services) ..... 10
- Virtualization ..... 10
  
- Features available on mobile devices ..... 11**
- Ease of use ..... 11
- Viewing data ..... 12
- Adding, uploading, or modifying data ..... 13
- Reports and workflows ..... 13
- Dashboards ..... 14
- Communicating ..... 14

# Software requirements

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**Warning:** Sage CRM doesn't support Microsoft products that have reached mainstream support end date.

- [Operating systems](#)
- [Database server](#)
- [Web browsers](#)
- [Mobile devices](#)
- [Mobile apps](#)
- [Document Drop plugin](#)
- [Microsoft Exchange](#)
- [Outlook plugins](#)
- [Citrix XenApp](#)
- [Remote Desktop Services \(formerly Terminal Services\)](#)
- [Virtualization](#)

# Operating systems

Operating systems listed in this section should be either without Service Pack or with the latest Service Pack available at the time of Sage CRM 2017 R2 release.

**Note:** Install the latest updates for your version of Windows.

## Sage CRM server

Requirement	Details
Operating system	<ul style="list-style-type: none"><li>• Microsoft Windows Server 2016</li><li>• Microsoft Windows Server 2016 Essentials</li><li>• Microsoft Windows Server 2012 R2</li><li>• Microsoft Windows Server 2012 R2 Essentials</li><li>• Microsoft Windows Server 2012</li><li>• Microsoft Windows Server 2012 Essentials</li></ul>
Web Server (IIS)	The computer on which you plan to install Sage CRM must have the <b>Web Server (IIS)</b> server role installed. Sage CRM supports Web Server (IIS) supplied with the operating systems listed above.
Installation on a domain controller	You can install Sage CRM on a domain controller if it is running one of the following: <ul style="list-style-type: none"><li>• Microsoft Windows Server 2016 Essentials</li><li>• Microsoft Windows Server 2012 R2 Essentials</li><li>• Microsoft Windows Server 2012 Essentials</li></ul> <p>On these operating systems Sage CRM does not support HTTPS, Remote Desktop Services, and CDONTS/CDOSYS.</p>

## Client computer

You can access Sage CRM from a computer running one of the following:

- Windows 10, 32-bit or 64-bit
- Windows 8.1, 32-bit or 64-bit
- Windows 7, 32-bit or 64-bit

# Database server

- Microsoft SQL Server 2016 SP1, Standard or Enterprise
- Microsoft SQL Server 2016 without SP, Standard or Enterprise
- Microsoft SQL Server 2014 SP1 or SP2, Standard or Enterprise
- Microsoft SQL Server 2012 SP2, Standard or Enterprise

**Warning:** Do not use Microsoft SQL Server 2014 Express supplied with Sage CRM in a production environment. It is provided for demonstration and testing purposes only.

# Web browsers

You can access Sage CRM with the following web browsers:

Browser	Must be installed on
Microsoft Internet Explorer 11 <ul style="list-style-type: none"><li>• 32-bit edition only.</li><li>• Compatibility View is not supported.</li></ul>	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Microsoft Edge	Windows 10
Mozilla Firefox (latest version)	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Google Chrome (latest version)	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Google Chrome for Android	Android KitKat 4.4 and later
Apple Safari 10	<ul style="list-style-type: none"><li>• macOS X Sierra (10.12)</li><li>• OS X El Capitan (10.11)</li></ul>
Apple Safari 9	OS X El Capitan (10.11)
Apple Safari for iOS	iOS 9.x or later

- To access the **Administration** area of Sage CRM, you must use a supported web browser on a Windows-based computer.
- The Classic Dashboard is supported on Microsoft Internet Explorer only.
- On 64-bit editions of Windows, the default web browser is Microsoft Internet Explorer 32-bit. The 64-bit edition of Internet Explorer is also installed.

## Mobile devices

**Note:** Some Sage CRM features are not supported on mobile devices. For more information, see [Features available on mobile devices](#).

Sage CRM supports and is optimized for viewing on these mobile devices:

Device	Operating system
Android phone	Android 4.4 KitKat or later
iPhone	iOS 9.x or later
iPad	iOS 9.x or later

## Mobile apps

**Note:** Some Sage CRM features are not supported on mobile devices. For more information, see [Features available on mobile devices](#).

Mobile devices on which you install the apps must meet the system requirements set in:

- [Sage CRM for Android Release Notes](#)
- [Sage CRM for iPhone Release Notes](#)

# Document Drop plugin

The plugin requires the following:

Requirement	Details
Microsoft Internet Explorer 11 <ul style="list-style-type: none"><li>• 32-bit edition only.</li><li>• Compatibility View is not supported.</li></ul>	Access Sage CRM with this web browser to install and use the Document Drop plugin.
Be a system administrator or power user on your computer	Required to install the Document Drop plugin.

## Microsoft Exchange

Sage CRM can integrate and work with the following Exchange versions:

- Microsoft Exchange Server 2016, 64-bit edition only
- Microsoft Exchange Server 2013 SP1, 64-bit edition only
- Exchange Online (part of Microsoft Office 365)

In these Exchange versions, the following features and roles must be enabled:

- Exchange Web Services (EWS)
- Application Impersonation
- Integrated Windows Authentication with Anonymous Authentication

**Note:** Sage CRM was tested with Business plans of Office 365.



# Outlook plugins

Software	Classic Outlook Plugin	Lite Outlook Plugin
Microsoft Outlook	<p>Supports Outlook supplied with:</p> <ul style="list-style-type: none"> <li>• Microsoft Office 2016 32-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 2013 32-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 2010 32-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 365 You must have the 32-bit desktop version of Outlook app installed on your computer.</li> </ul>	<p>Supports Outlook supplied with:</p> <ul style="list-style-type: none"> <li>• Microsoft Office 2016 32-bit and 64-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 2013 32-bit and 64-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 2010 32-bit and 64-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 365 You must have the 32-bit or 64-bit desktop version of Outlook app installed on your computer.</li> </ul>
Microsoft Exchange	See <a href="#">Microsoft Exchange</a> in this document.	
Microsoft .NET Framework	<p>Make sure the following versions are installed on client computers:</p> <ul style="list-style-type: none"> <li>• Microsoft .NET Framework 4.6</li> <li>• Microsoft .NET Framework 3.5</li> </ul>	
<p>Microsoft Internet Explorer 11</p> <ul style="list-style-type: none"> <li>• 32-bit edition only.</li> <li>• Compatibility View is not supported.</li> </ul>	<p>Access Sage CRM with this web browser to install and use the Outlook plugins.</p>	

# Citrix XenApp

**Note:** Some Sage CRM features are not available when Sage CRM is deployed via XenApp. For more information see, the *System Administrator Help* on the [Sage CRM Help Center](#).

Supported version	Protocols	Supported application delivery methods
Citrix XenApp 7.6, 32-bit and 64-bit editions	HTTP, HTTPS	<ul style="list-style-type: none"><li>• Publish desktops</li><li>• Publish applications</li></ul>

## Remote Desktop Services (formerly Terminal Services)

**Note:** For more information on how to install and use Sage CRM Outlook plugins with Remote Desktop Services, see the *System Administrator Help* on the [Sage CRM Help Center](#).

Supported version	Protocols	Supported application delivery methods
RDS supplied with: <ul style="list-style-type: none"><li>• Windows Server 2016 Standard</li><li>• Windows Server 2012 R2 Standard or Datacenter</li></ul>	HTTP, HTTPS	Publish full desktop

## Virtualization

Sage CRM can run on any virtualization environment.

# Features available on mobile devices

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- [Ease of use](#)
- [Viewing data](#)
- [Adding, uploading, or modifying data](#)
- [Reports and workflows](#)
- [Dashboards](#)
- [Communicating](#)

## Ease of use

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
In-product help	✓		✓
Support of native device UI elements		✓	✓
Multilingual support	✓	✓	✓
Offline access			✓

# Viewing data

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
View contacts or people	✓	✓	✓
View companies	✓	✓	
View leads	✓	✓	
View opportunities	✓	✓	✓
View Sage CRM Builder modules	✓		
View cases	✓	✓	
View notes	✓		✓
View recent items/history	✓		✓

# Adding, uploading, or modifying data

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Add or import people	✓	✓	✓
Add or import companies	✓	✓	✓
Add or import leads	✓	✓	✓
Add opportunities	✓	✓	
Add cases	✓	✓	
Add notes	✓		✓
Flag favorites			✓
Set phone alerts from the calendar			✓
Upload data			
Upload or attach documents			

# Reports and workflows

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Create reports	✓		
Generate reports	✓	✓	
Use workflows	✓		

# Dashboards

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Classic dashboard	✓	✓	
Interactive dashboard	✓		

# Communicating

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Auto communication logging from calls, emails, and SMS			✓
Mail merge	✓		
Map linking from address details		✓	✓
Outbound call handling	✓		
Marketing campaigns	✓		