



Sage CRM 2017 R2

Release Notes

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Overview

This document provides information about the new features and enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage CRM 2017 R2 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 R2 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 R2, 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 |
|---------------------|-----------------------|----------------|
| March 2017 | eWare.dll | 20.17.0.2 |
| | Outlook plugin | 20.17.0.2 |
| | 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 R2.


For more information about the software with which Sage CRM 2017 R2 can work and integrate, see the *Sage CRM 2017 R2 Software Requirements and Mobile Features* guide 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](#).

New features and enhancements

The following is a list of new features and enhancements implemented in Sage CRM 2017 R2.




| Area | New feature or enhancement |
|-----------------------|--|
| System settings | <ul style="list-style-type: none">• Checking system health. System administrators can use the new System Health option to monitor the health of 10 Sage CRM components in real time. Click <My Profile> Administration System. If there are issues with a component, click Help for troubleshooting instructions. For details, see Troubleshooting system health issues.• Setting a custom server name. System administrators can set a custom Sage CRM server name for internal requests that's different from the actual server name. Click <My Profile> Administration System System Behavior. Use the Send internal reqs to actual server name and Custom server name for internal reqs options. The server name is used for internal requests in the following Sage CRM features:<ul style="list-style-type: none">• Mail Merge• Data Upload• MailChimp Integration• Swiftpage Integration• GCRM-based integrations• Exchange Integration |
| MailChimp Integration | <ul style="list-style-type: none">• Support for MailChimp API 3.0. The Sage CRM and MailChimp Integration fully supports the new MailChimp API. |




| Area | New feature or enhancement |
|-----------------------|--|
| Built-in email client | <ul style="list-style-type: none"> • Auto-suggestion of recipients in the To, CC, and BCC fields of emails. Start typing the name or email address of a person or company in the To, CC, and BCC fields, and Sage CRM automatically displays a list of matching records. Click the record to add it as a recipient to the current field. • Default email signature (0-164691-ENH). Each user can create and edit their default email signature in <My Profile> Preferences. For details, see Managing your email signature. |
| Calendar | <ul style="list-style-type: none"> • Timeline view in Team CRM calendar. When the calendar is in Team CRM mode, users can go to the new Timeline view to display appointments assigned to all members of the selected team. • Viewing appointments scheduled for the entire month. When the calendar is in My CRM mode, users can open the Month view to display appointments planned for the entire selected month. • Printing the calendar. A new Print button () allows you to easily print the current calendar view. • Assigning icons to custom appointment actions. System administrators can assign custom icons to the custom appointment actions they create. For details, see Creating a custom appointment action. • Customizing appointment colors in Team CRM calendar. System administrators can customize the color in which appointments assigned to a particular user are displayed in the Team CRM calendar. For details, see Changing appointment color for a user. |
| Customization | <ul style="list-style-type: none"> • Optimizing custom entity lists for faster loading. When creating or editing a custom entity list, system administrators can optimize the list for faster loading by using a new option named Use all SQL columns in query. For details, see Optimizing a custom entity list for faster loading. |
| Exchange Integration | <ul style="list-style-type: none"> • Improved processing of invalid XML characters (0-165140-ENH). When an invalid XML character is found, Exchange synchronization does not stop. |
| Mobile theme | <ul style="list-style-type: none"> • Required fields and invalid field values are highlighted (0-167918-ENH, 0-168019-ENH). Mobile screens highlight the required fields and fields that contain invalid values. |
| Usability | <ul style="list-style-type: none"> • Autosizing of Sage CRM windows (0-168517-ENH). Sage CRM windows are autosized properly. • Improved formatting of hyperlinks in reports (0-168313-ENH). Hyperlinks in reports are highlighted when you point to them with a mouse. |

| Area | New feature or enhancement |
|-------------------------------------|---|
| Third-party components and software | <ul style="list-style-type: none">• jQuery updated to the latest version (0-168410-ENH). Sage CRM uses jQuery version 3.1.1.• Support for Microsoft SQL Server 2016 SP1. System administrators can use this version of SQL Server to host the Sage CRM database.• Support for the latest macOS versions. Users can access Sage CRM using the Safari web browser installed on macOS El Capitan (10.11) or macOS Sierra (10.12). |
| Documentation | <ul style="list-style-type: none">• Added instructions on how to configure a blacklist of passwords (0-168601-ENH). Documentation describes how to configure a list of words that cannot be set as user passwords (dictionary.txt). For details, see the <i>System Administrator Help</i>. |

Troubleshooting system health issues

A Sage CRM component can have one of the following statuses:

-  The component is working properly.
-  The component is not enabled.
-  There are issues with the component.

| Component | Sage CRM features that use the component | Troubleshooting |
|---------------|--|---|
| Apache Tomcat | <ul style="list-style-type: none"> • Calendar • Document Drop • Exchange Integration • Features in the top bar: <ul style="list-style-type: none"> • Quick Find • Notifications () • Favorites () • Recent () | Apache Tomcat troubleshooting |
| URL Rewrite | <ul style="list-style-type: none"> • GCRM-based integrations • Interactive Dashboard • MailChimp Integration • Mail Merge • SData APIs • Swiftpage Integration | URL Rewrite troubleshooting |

| Component | Sage CRM features that use the component | Troubleshooting |
|--------------------------|---|--|
| SData 1.1 | <ul style="list-style-type: none"> • Document Drop • Exchange Integrations • GCRM-based integrations • Interactive Dashboard • Mobile apps • SData feeds from Sage CRM consumed by other applications | SData troubleshooting |
| SData 2.0 | <ul style="list-style-type: none"> • Calendar • Features in the top bar: <ul style="list-style-type: none"> • Quick Find • Notifications (🔔) • Favorites (★) • Recent (📅) | SData troubleshooting |
| CRM Quick Find Service | Quick Find in the top bar | CRM Quick Find Service troubleshooting |
| Notifications | Notifications (🔔) in the top bar | Notifications troubleshooting |
| Exchange Synchronization | Exchange Integration | Exchange Synchronization troubleshooting |
| SMTP Connection | Sending emails from the built-in email client. | SMTP Connection troubleshooting |
| CRM Escalation Service | <ul style="list-style-type: none"> • Escalation rules • Workflows • Notifications (🔔) in the top bar | CRM Escalation Service troubleshooting |
| CRM Indexer Service | Updating the keyword search index. For example, when a user creates a new entity record. | CRM Indexer Service troubleshooting |

Apache Tomcat troubleshooting

- Use the Services tool (services.msc) on the Sage CRM server to ensure the **Apache Tomcat 7.0 CRMTomcat7** service is running. Start or restart the service if necessary.
- To ensure the port used by Apache Tomcat is open and doesn't have any conflicting connections, run the following at a command prompt on the Sage CRM server:

```
netstat -ano | find "<PortNumber>"
```

where <PortNumber> is the port used by Apache Tomcat. This is usually port 10009.

Components that fail if Apache Tomcat fails:

- URL Rewrite
- SData 1.1 and 2.0
- CRM Quick Find Service
- Notifications
- Exchange Synchronization

URL Rewrite troubleshooting

1. URL Rewrite fails if Apache Tomcat fails. Resolving issues with Apache Tomcat may also fix URL Rewrite. For troubleshooting tips, see [Apache Tomcat troubleshooting](#).
2. If issues persist, it may indicate that the URL Rewrite inbound rules were incorrectly modified or deleted. To restore the original inbound rules, use the Sage CRM Setup Wizard:
 - a. On the Sage CRM server, start the Sage CRM Setup Wizard.
 - b. Step through the wizard until you are on the **Please choose setup type** step.
 - c. Select **Change existing install of CRM** and click **Next**.
 - d. On the **Reinstall options** step, select **IIS Aliases**. Make sure that you clear all other check boxes.
 - e. Complete the wizard.

Components that fail if URL Rewrite fails

- SData 1.1 and 2.0
- CRM Quick Find Service
- Notifications
- Exchange Synchronization

URL Rewrite fails if these components fail

Apache Tomcat

SData troubleshooting

SData 1.1 and 2.0 relies on Apache Tomcat and URL Rewrite. Resolving issues with these components may also fix SData. For troubleshooting tips, see:

- [Apache Tomcat troubleshooting](#)
- [URL Rewrite troubleshooting](#)

CRM Quick Find Service troubleshooting

1. CRM Quick Find Service relies on Apache Tomcat and URL Rewrite. Resolving issues with these components may also fix CRM Quick Find Service. For troubleshooting tips, see:
 - [Apache Tomcat troubleshooting](#)
 - [URL Rewrite troubleshooting](#)
2. If issues persist, use the Services tool (services.msc) on the Sage CRM server to make sure the **CRM Quick Find Service** service is running. Start or restart the service if necessary.

Notifications troubleshooting

Notifications rely on Apache Tomcat and URL Rewrite. Resolving issues with these components may also fix Notifications. For troubleshooting tips, see [Apache Tomcat troubleshooting](#).

Exchange Synchronization troubleshooting

1. Exchange Synchronization relies on Apache Tomcat and URL Rewrite. Resolving issues with these components may also fix CRM Quick Find Service. For troubleshooting tips, see:
 - [Apache Tomcat troubleshooting](#)
 - [URL Rewrite troubleshooting](#)
2. If issues persist, check that you have configured Exchange Integration correctly.

SMTP Connection troubleshooting

Ensure that:

- SMTP server specified in Sage CRM is up and running.
- SMTP port specified in Sage CRM is open and accepts connections. For example, the port may be blocked by a firewall or antivirus.

Note: The System Health feature doesn't check if the SMTP server user name and password are correct.

CRM Escalation Service troubleshooting

Use the Services tool (services.msc) on the Sage CRM server to ensure that **CRM Escalation Service** is running. Start or restart the service if necessary.

CRM Indexer Service troubleshooting

Use the Services tool (services.msc) on the Sage CRM server to ensure that **CRM Indexer Service** is running. Start or restart the service if necessary.

Customizing calendar

- [Creating a custom appointment action](#)
- [Changing appointment color for a user](#)

Creating a custom appointment action

- [Step 1: Add new appointment action to the database](#)
- [Step 2: Assign an icon to the appointment action](#)

Step 1: Add new appointment action to the database

1. Click **<My Profile> | Administration | Customization | Communication**.
2. In the **Field Caption** column, locate **Action** and then in the **Field Type** column click **Selection**.
3. Create a new appointment action:
 - a. In **Add Translation**, type the action name.
 - b. In **Code**, type the action code.
 - c. Click **Add** and then click **Save**.

Step 2: Assign an icon to the appointment action

1. Create your action icon and save it as a .gif, .png, or .jpeg file.
 - Keep the graphic file size small.
 - Ensure your icon is square.
2. Copy the graphic file to a subfolder in the following location on the Sage CRM server:
<Sage CRM installation folder>\WWWRoot
3. Create a JavaScript file named **responsiveCalendarCustomActions.js** to assign your action icon to the custom appointment action. For sample code, see [Sample responsiveCalendarCustomActions.js file](#).
4. Copy the file to the following folder on the Sage CRM server:
<Sage CRM installation folder>\WWWRoot\js\custom
5. On the Sage CRM server, run the `iisreset` command at a command prompt.

Sample responsiveCalendarCustomActions.js file

This sample code assigns the icon file **CustomIcon.gif** to the appointment action whose code is **myactioncode**.

```
SageCRM = SageCRM || {};  
  
/* Function to add the styles. */  
var addStyles = function(styles){  
var customStyles = document.createElement('style');  
for(i=0;i<styles.length;i++){  
customStyles.innerHTML = customStyles.innerHTML + styles[i];  
}  
document.head.appendChild(customStyles);  
};  
  
/* Add CSS style definitions for your action icons */  
styles=[".sage-calendar-icon.myclass{background-image: url  
('/"+crm.installName()+"/MyImages/CustomIcon.gif');}","  
// Add next style definition here.  
];  
  
/* Map action codes to CSS classes defining your icons */  
SageCRM.CUSTOM_ACTION_TYPE_ICONS = {  
"myactioncode" : "myclass",  
// Add next mapping definition here  
};  
  
/* Add the styles to the page */  
addStyles(styles);
```


JavaScript code element

```
styles=[  
<style definition 1>,  
<style definition 2>,  
<style definition 3>  
]
```

Details

Each style definition in this element should have the following format:

```
".sage-calendar-icon.<your  
CSS class>{background-image: url  
( '/' +crm.installName()+"<path to  
your icon>');}"
```

Where

- `<your CSS class>` is the name of your custom CSS class that specifies the path to the icon file.
- `<path to your icon>` is the relative path to the folder that contains your icon file. Specify the path relative to **<Sage CRM installation folder>\WWWRoot**
The sample code points to the following icon file:
<Sage CRM installation folder>\WWWRoot\MyImages\CustomIcon.gif

```
SageCRM.CUSTOM_ACTION_TYPE_ICONS =  
{  
<mapping definition 1>,  
<mapping definition 2>,  
<mapping definition 3>  
}
```

Each mapping definition in this element should have the following format:

```
"<appointment action code>" :  
"<your CSS class>,"
```

Where

- `<appointment action code>` is the action code you specified in [Step 1: Add new appointment action to the database](#).
- `<your CSS class>` is the name of your custom CSS class that specifies the path to the icon file.

Changing appointment color for a user

You can change the default color in which appointments assigned to a particular user are displayed in the **Team CRM** calendar.

1. Create a JavaScript file named **responsiveTeamCalendarUserColors.js**.
2. Add the following code to the file:

```
SageCRM = SageCRM || {};  
  
SageCRM.CUSTOM_TEAM_CALENDAR_USER_COLORS = {  
  // Map user IDs to colors.  
  "<user ID>" : "<color>",  
};
```

Where

- `<user ID>` is the Sage CRM user ID.
- `<color>` is the color in which you want the appointments to be displayed. Use hex color code, for example `#00DC00`.


You can add as many "`<user ID>`" : "`<color>`" pairs as you like. Use a comma as a separator.

3. Save and copy the file to the following folder on the Sage CRM server:
<Sage CRM installation folder>\WWWRoot\js\custom
4. On the Sage CRM server, run the `iisreset` command at a command prompt.

Optimizing a custom entity list for faster loading

Note: This option is not supported for standard entities.

By default, Sage CRM looks for data related to a custom entity list in all database columns. You can configure Sage CRM to look for data only in those database columns that are added to your custom entity list.

1. Click **<My Profile> | Administration | Customization | <Custom Entity> | Lists**.
2. To optimize an existing list, click the **Change** icon () beside it.
To create and optimize a new list, click **New**.
3. Set **Use all SQL columns in query** to **No**.
4. Click **Save**.

If you get an error when your list is loading, a list column in your customization might be missing from the SQL query that loads list. To resolve this issue, add the column to the list but make it hidden:

1. Click **<My Profile> | Administration | Customization | <Custom Entity> | Lists**.
2. Click the list name.
3. From **Field**, select the column you want to add. This is the column mentioned in the error message displayed when the list is loading.
4. Click **Add**.
5. In the list under **Desktop HTML List Contents**, click the column you've just added.
6. In **CreateScript**, type the following:

```
Hidden = true;
```
7. Click **Save**.

Managing your email signature

- [Creating your email signature](#)
- [Editing your email signature](#)
- [Enabling or disabling your email signature](#)
- [Deleting your email signature](#)

Creating your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Create Email Signature**.
3. In the **Template Name** option, enter a name for your email signature.
4. In the text box below the toolbar, type your email signature.
5. Click **Save**.

Editing your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Edit Email Signature**.
3. In the **Template Name** option, edit the name of the email template containing your email signature.
4. In the text box below the toolbar, edit your email signature.
5. Click **Save**.

Enabling or disabling your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Change**.
3. In **Default Email Template**, do one of the following:
 - **To disable your email signature.** Select **--None--** or any other email template that doesn't contain your email signature.
 - **To enable your email signature.** Select the email template that contains your email signature.
4. Click **Save**.

Deleting your email signature

1. Click **<My Profile> | Preferences**.
2. Click **Edit Email Signature**.
3. Click **Delete**.

Addressed issues

This section lists the issues reported by our customers that were addressed in Sage CRM 2017 R2.

The status **Cannot reproduce** in the table below means that the issue could not be reproduced on Sage CRM 2017 R2. Install Sage CRM 2017 R2 to resolve the issue.

Note: After you install Sage CRM 2017 R2, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard will work correctly.

| Issue ID | Area | Description | Status |
|-------------|----------------------|--|---|
| 0-167673-QA | .NET API | Search parameters were not retained. | Cannot reproduce. |
| 0-168093-QA | 3rd Party Software | An outdated version of MSXML was supplied with Sage CRM. | This issue is fixed. Now MSXML version 6 is included with Sage CRM. |
| 0-168467-QA | Campaign Management | When a user tried to change a Phone Out communication record, an error message occurred. | This issue is fixed. |
| 0-168291-QA | Companies / People | When a user merged a company record, an error message occurred stating that the source record cannot be deleted. | Customization issue. |
| 0-164476-QA | Component Management | Hidden system fields were visible on a custom entity after it was scripted as a component and then installed on another Sage CRM instance. | This issue is fixed. |
| 0-167858-QA | Configuration | An HTTP 400 error occurred in Advanced Find. | Cannot reproduce. |
| 0-167924-QA | Core Product | The Find screen displayed the wrong entity icon. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-------------|---------------|--|----------------------|
| 0-168219-QA | Core Product | The Automatic Login feature of IIS didn't work for Sage CRM in a multi-domain environment. | This issue is fixed. |
| 0-168470-QA | Core Product | When a user cleared an Advanced Search Select field and clicked Find , the cleared value was inserted again into the field. | This issue is fixed. |
| 0-168853-QA | Core Product | On Sage 300 integrations, Sage CRM allowed insecure modifications to the URL. | This issue is fixed. |
| 0-166444-QA | Customization | When a user clicked the subject of a communication, an error occurred. | This issue is fixed. |
| 0-167193-QA | Customization | When a user tried to export a list of custom entity records to a file, an error occurred. | This issue is fixed. |
| 0-167728-QA | Customization | Wrong person details were added to email when the standard email template was used. | This issue is fixed. |
| 0-167934-QA | Customization | After a refresh, the Name field on a search screen wasn't cleared. | This issue is fixed. |
| 0-168279-QA | Customization | A user was unexpectedly redirected from a custom entity tab to the Find screen. | This issue is fixed. |
| 0-168387-QA | Customization | When a user opened a communication record, an error message appeared stating that the record is locked by the current user. | This issue is fixed. |
| 0-168456-QA | Customization | Code added to Create Script didn't work. | This issue is fixed. |
| 0-168498-QA | Customization | When a user modified year in a date field and clicked Save , the year was reset to the wrong value. | This issue is fixed. |
| 0-169101-QA | Customization | Escalation rules didn't send emails. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-------------|----------------------|---|--|
| 0-167756-QA | Customization Wizard | When a user viewed a custom entity record, top content displayed the wrong context. | By design. There is no way to set the required context when using custom pages in advanced customization. As a workaround, you can create a custom ASP page that redirects the request to the correct context. |
| 0-168208-QA | Data Upload | When required fields were disabled, an error occurred during data upload stating that the required fields were blank. | This issue is fixed. |
| 0-167305-QA | Comms/Diary | When the Location field contained special characters, an HTTP 400 error occurred. | Cannot reproduce. |
| 0-168163-QA | Comms/Diary | When a user tried to create a new communication by dragging and dropping an email from Microsoft Outlook to Sage CRM, an error occurred . | This issue is fixed. |
| 0-168182-QA | Comms/Diary | The Save button didn't work on tasks. | This issue is fixed. |
| 0-168250-QA | Comms/Diary | The Company field of a follow-up appointment was unexpectedly cleared. | This issue is fixed. |
| 0-168333-QA | Comms/Diary | Entries were missing from multi-select lists. | This issue is fixed. |
| 0-165331-QA | Document Drop | When a user uploaded a file with a long file name, an error occurred. | This issue is fixed. |
| 0-167656-QA | Exchange Integration | Exchange synchronization failed when no Internet connection was available. | This issue is fixed. |
| 0-168160-QA | Exchange Integration | A company name change was not synced from Microsoft Outlook or Exchange Server to Sage CRM. | By design. Documentation updated. |

| Issue ID | Area | Description | Status |
|-------------|-----------------------|---|---|
| 0-168337-QA | Exchange Integration | A contact phone number change was not synced from Sage CRM to Microsoft Outlook. | This issue is fixed. |
| 0-167579-QA | E-mail Client | Changing the default font in the email/template editor didn't have any effect. | By design Additional information provided to the customer. |
| 0-166075-QA | E-mail Manager | Mass emails sent to a group were not filed when Email Management was enabled. | By design. Documentation updated. |
| 0-167124-QA | E-mail Manager | Exchange synchronization failed due to an internal resource error. | Cannot reproduce. |
| 0-168169-QA | E-mail Manager | Special characters were displayed incorrectly in filed emails. | This issue is fixed. |
| 0-168558-QA | E-mail Manager | Inbound emails were not filed. | By design. |
| 0-168728-QA | E-mail Manager | Special characters were displayed incorrectly in received emails. | This issue is fixed. |
| 0-168880-QA | E-mail Manager | Characters from extended character sets were displayed incorrectly in emails. | This issue is fixed. |
| 0-167141-QA | Find / Advanced Find | When a user ran a search in Advanced Find , an HTTP 400 error occurred. | This issue is fixed. |
| 0-167238-QA | Groups / Target Lists | The communication list showed the names of merge fields instead of actual data. | This issue is fixed. |
| 0-169023-QA | Install / Upgrade | Quick Find didn't work. | This issue is fixed. |
| 0-169074-QA | Install / Upgrade | Log files were saved in the root of the drive on which you installed Sage CRM. | This issue is fixed. |
| 0-165063-QA | Interactive Dashboard | Interactive Dashboard required users to log on after upgrading Sage CRM. | Cannot reproduce. |
| 0-167391-QA | Interactive Dashboard | Interactive Dashboard failed to work when the Sage CRM server wasn't connected to the Internet. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-----------------------------|-------------------------|--|----------------------|
| 0-168611-QA | Interactive Dashboard | When a user tried to link two gadgets, Oppo_OppportunityId was not available. | Cannot reproduce. |
| 0-166417-QA | Interactive Dashboard | When a user tried to create a new list gadget, an error occurred. | Cannot reproduce. |
| 0-167998-QA | Interactive Dashboard | The change of a field caption was not reflected in gadgets. | This issue is fixed. |
| 0-168148-QA | Interactive Dashboard | A gadget based on an Advanced Find report returned an error. | This issue is fixed. |
| 0-168560-QA | Interactive Dashboard | A gadget configured to display the contents of an ASP page didn't display anything. | This issue is fixed. |
| 0-168659-QA | Interactive Dashboard | An error occurred when a user tried to create a new website gadget. | This issue is fixed. |
| 0-168680-QA | Interactive Dashboard | A new gadget returned a security violation error. | Cannot reproduce. |
| 0-167471-QA | JavaScript API | In the Client-side API, <code>crm.fields("comm_datetime").val()</code> returned the wrong value. | This issue is fixed. |
| 0-167587-QA | E-Marketing (MailChimp) | Communication records weren't created for a MailChimp campaign. | This issue is fixed. |
| 0-168729-QA, 0-168678-QA | E-Marketing (MailChimp) | When a user sent a group to MailChimp, an error occurred. | This issue is fixed. |
| 0-168980-QA | E-Marketing (MailChimp) | In some cases, MailChimp campaigns didn't return any results. | This issue is fixed. |
| 0-168900 | E-Marketing (MailChimp) | Some records from a static group were not sent to MailChimp. | This issue is fixed. |
| 0-168927-QA | MasterTomcat | The following issues occurred when you saved the value of a date field in a mobile browser: <ul style="list-style-type: none"> The saved date was one day behind the specified date. The date format was different from the one you specified. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-------------|-------------------------|---|----------------------|
| 0-167146-QA | Mail Merge | When a user performed a mail merge on a secondary entity, the wrong context was shown. | Cannot reproduce |
| 0-167167-QA | Mail Merge | Incorrect thousand separator was inserted into a quote when the user language was set to French. | This issue is fixed. |
| 0-167622-QA | Mail Merge | During a mail merge, all website hyperlinks were unexpectedly changed to file hyperlinks in the created document. | This issue is fixed. |
| 0-167778-QA | Mail Merge | When a system administrator tried to change the entity type in an email template, an error occurred. | This issue is fixed. |
| 0-166886-QA | Mobile Theme | Users had to scroll lists horizontally because they didn't fit on the screen. | By design. |
| 0-167135-QA | Mobile Theme | Users with long passwords (20+ characters) couldn't log on to Sage CRM. | This issue is fixed. |
| 0-167287-QA | Mobile Theme | Advanced Search Select fields didn't work properly on mobile devices. | Cannot reproduce. |
| 0-167918-QA | Mobile Theme | A validate script added to a mobile screen failed to work as expected. | This issue is fixed. |
| 0-168019-QA | Mobile Theme | Fields that contained incorrect values were not highlighted on mobile screens. | This issue is fixed. |
| 0-168325-QA | Mobile Theme | Options that set a date range were missing from the Find screens on mobile devices. | By design. |
| 0-168893-QA | Mobile Theme | Search results didn't show some entity records that actually met the search criteria. | This issue is fixed. |
| 0-168749-QA | Notification | Multiple notification emails were sent for a single event. | This issue is fixed. |
| 0-167235-QA | Outlook Integ - Classic | The width of the comm_to column was unexpectedly increased. | Cannot reproduce. |

| Issue ID | Area | Description | Status |
|-----------------------------|---------------------------|--|----------------------|
| 0-167730-QA | Outlook Integ - Classic | When a user replied to a filed email that contained attachments, an error occurred. | Cannot reproduce. |
| 0-168113-QA | Outlook Integ - Classic | A file email operation failed in Microsoft Outlook. | This issue is fixed. |
| 0-168443-QA | Outlook Integ - Classic | To sync contacts in Microsoft Outlook, a user had to click Reset Sync Info first. | Cannot reproduce. |
| 0-166482-QA | Outlook Integ - Exchange | When a user tried to file an email where some HTML tags were not closed, an error occurred. | This issue is fixed. |
| 0-167175-QA | Outlook Integ - Exchange | The Outlook Plugin Setup listed an unsupported Microsoft Outlook version. | This issue is fixed. |
| 0-167722-QA | Outlook Integ - Exchange | An outgoing email was filed as incoming. | This issue is fixed. |
| 0-167761-QA | Outlook Integ - Exchange | The connection between Sage CRM and the Outlook Plugin was lost. | This issue is fixed. |
| 0-168412-QA | Performance / Scalability | Sage CRM didn't check the user-supplied host headers properly. | Cannot reproduce. |
| 0-168416-QA | Performance / Scalability | Some HTML pages contained incorrect cache control code. | This issue is fixed. |
| 0-167369-QA | Quotes / Orders | The Save button didn't work on tasks. | Cannot reproduce. |
| 0-165797-QA, 0-166070-QA | Recent List | Custom entity records failed to open from the Recent list. | This issue is fixed. |
| 0-163931-QA | Registration Form | Sage CRM tried to re-register when the IP address or MAC address of the Sage CRM server changed. | By design. |
| 0-166041-QA | Reports | Reports didn't show the value of the Opt out of e-marketing communications option. | This issue is fixed. |
| 0-166192-QA | Reports | Reports showed the wrong scheduled day for some activities. | This issue is fixed. |
| 0-166891-QA | Reports | A report failed to run if Sorting Option was set to By Caption Order . | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-------------|-----------------------|--|---|
| 0-167962-QA | Reports | When a user edited a report to add fields to Sort On or Group By , an error occurred. | This issue is fixed. |
| 0-168152-QA | Reports | A chart didn't show cases in progress. | This issue is fixed. |
| 0-168176-QA | Reports | Reports didn't return entity records that contained custom Intelligent Select fields. | This issue is fixed. |
| 0-168283-QA | Reports | When a user ran a report that had Sort Orders set to Translation Order , an error occurred. | This issue is fixed. |
| 0-168525-QA | Reports | It wasn't possible to use special characters in a report category name. | This issue is fixed. |
| 0-168750-QA | SData Provider | A user whose name included non-English characters couldn't open some screens in Sage CRM integrations. | This issue is fixed. |
| 0-167157-QA | Solutions | When a user clicked New Email in a solution record, no email template was automatically selected. | By design. As a workaround, create a custom email template for solutions so that users could select it manually. |
| 0-168731-QA | Groups / Target Lists | It was possible to delete private groups created by other users by modifying the group URL in a web browser. | This issue is fixed. |
| 0-166690-QA | User Interface | When a user saved an appointment, a Bad Request message was displayed. | This issue is fixed. |
| 0-167572-QA | User Interface | When a user searched for records in Advanced Find , an error occurred. | This issue is fixed. |
| 0-168247-QA | User Interface | Fields secterr (entry type 53) and password (entry type 49) didn't have an ID set. | This issue is fixed. |
| 0-168850-QA | User Interface | The Save and Cancel buttons were missing from some screens. | This issue is fixed. |
| 0-168446-QA | Web2lead | While creating a new web lead, an access violation occurred. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|-----------------|--------------|---|----------------------|
| 0-166285-QA | Web Services | A Web Services query caused a memory leak. | Cannot reproduce. |
| 0-167000-QA | Workflow | A user who didn't have rights to view certain workflow rules was able to view them in a dashboard gadget. | This issue is fixed. |

Upgrading

You can use the Sage CRM 2017 R2 installation package to upgrade from versions 2017 R1, 7.3 SP3, 7.3 SP2, 7.3 SP1, 7.3, and 7.2.

After upgrading Sage CRM, you must log on to Sage CRM as a system administrator at least once before upgrading to the next version. This is required to update the Sage CRM database correctly.

Note: Support for Sage CRM 7.2 will be discontinued in June 2017.