



Sage CRM 2017 R3

Release Notes

Updated: July 2017

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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 R3 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 R3 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 R3, 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
July 2017	eWare.dll	20.17.0.3
	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 R3.

For more information about the software with which Sage CRM 2017 R3 can work and integrate, see the *Sage CRM 2017 R3 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

Sage CRM 2017 R3 is a maintenance release. In this release only one new feature was implemented.

Area	New feature or enhancement
Reports	Sage CRM now uses HTML5 to render charts. Adobe Flash Player is no longer required.

Addressed issues

This section lists the issues reported by our customers that were addressed in Sage CRM 2017 R3.

The status **Cannot reproduce** in the table below means that the issue could not be reproduced in Sage CRM 2017 R3. Install Sage CRM 2017 R3 to resolve the issue.

Note: After you install Sage CRM 2017 R3, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
0-169062-QA	.NET API	The <code>ge</code> and <code>le</code> operators of the <code>filterWhere</code> method in the client-side API didn't work.	This issue is fixed.
0-168963-QA	.NET API	When a reminder message was sent, the value of the <code>cmli_smsmessagesent</code> field wasn't updated to <code>Y</code> .	Cannot reproduce.
0-169030-QA	.NET API	When a user without sufficient rights tried to delete a case record, no error message displayed.	This issue is fixed.
0-169059-QA	Address Linking	On a Sage 200 integration, shipping addresses were not formatted as hyperlinks.	By design.
0-166763-QA	Comms/Diary	It was not possible to open a communication record from a list of search results.	Cannot reproduce.
0-165323-QA	Comms/Diary	When the date format was set to <code>D.MM.YYYY</code> or <code>D/MM/YYYY</code> , the end date of an appointment started with a zero.	This issue is fixed.
0-169095-QA	Comms/Diary	The Save button didn't save new and changed tasks.	This issue is fixed.

Issue ID	Area	Description	Status
0-166421-QA	Companies/ People	Company Name Cleanup remove and replace rules didn't work as expected.	By design. Documentation updated.
0-169163-QA	Companies/ People	When a user resized the Sage CRM window, some buttons (such as Save , Cancel , and Help) were hidden.	This issue is fixed.
0-168671-QA	Companies/ People	When a user selected None in the Status field for a Company record, an error 400 occurred.	This issue is fixed.
0-169037-QA	Companies/ People	A person created in the context of an opportunity record was assigned to the wrong account.	This issue is fixed.
0-169272-QA	Companies/ People	A search for persons to be merged returned no results, although such persons did exist.	By design.
0-169403-QA	Companies/ People	When a user changed a person's company, the information in the Address section wasn't updated.	This issue is fixed.
0-166728-QA	Configuration	My CRM for option in My CRM Calendar displayed numbers instead of names. Also tasks and appointments were missing from the calendar.	Cannot reproduce.
0-167926-QA	Core Product	Search criteria were not retained on search pages.	This issue is fixed.
0-169164-QA	Core Product	When a user created a new SLA and logged a new case using that SLA, an error occurred.	This issue is fixed.
0-168886-QA	Core Product	When the MAC or IP address of Sage CRM server changed, Sage CRM tried to re-register its license key and exceeded the maximum number of registration attempts.	By design.
0-169141-QA	CTI	When the same phone number was assigned to several people, CTI failed to display the list of people for an incoming call.	This issue is fixed.

Issue ID	Area	Description	Status
0-167968-QA	Customization	The closing <code></script></code> tag was automatically changed to <code></SC'+ 'RIPT></code> .	By design.
0-165152-QA	Customization	The names of the Change and Continue buttons were bolded in the Sage CRM UI.	This issue is fixed.
0-140977-QA	Customization	Buttons based on a CustomDotNet action were missing from screens.	This issue is fixed.
0-166347-QA	Customization	It was not possible to display multiple messages at the same time by using the <code>crm.errorMessage</code> or <code>crm.infoMessage</code> method.	By design.
0-161575-QA	Customization	When a user reduced the size of the Sage CRM window, some Sage CRM UI elements became inaccessible.	This issue is fixed.
0-166844-QA	Customization	When a user opened a custom company summary page from the Find company grid, a "Catastrophic failure" error occurred.	Customization issue: context was set incorrectly.
0-168707-QA	Customization	Pressing ENTER deleted the tab group contents.	Cannot reproduce.
0-169552	Customization	Validate and create scripts used on custom entity records impaired system performance.	This issue is fixed.
0-169058-QA	Customization	Sorting records in a list by the End Time field didn't work.	This issue is fixed.
0-168036-QA	Customization	The <code>TableExists()</code> method in the Component Manager didn't return TRUE for an existing custom table.	This issue is fixed.
0-168612-QA	Customization Wizard	When a custom entity title was changed using a SQL query, groups stopped working.	Customization issue.
0-166104-QA	Dashboard	Filter by value wasn't saved in a dashboard.	Cannot reproduce.

Issue ID	Area	Description	Status
0-168140-QA	Document Drop	Email drag and drop from Outlook to Google Chrome didn't work.	By design. To drag and drop an email, save it as an .msg file first.
0-166292-QA	Email Client	An email template displayed user ID instead of user name.	Cannot reproduce.
0-169142-QA	Email Manager	An email failed to send if it had an attachment whose name included non-English characters.	This issue is fixed.
0-169088-QA	Email Manager	The body of a reply email sent from Sage CRM was blank in Microsoft Outlook.	Cannot reproduce.
0-167619-QA	Email Manager	Text in automatic reply emails was formatted incorrectly.	Cannot reproduce.
0-168308-QA	E-Marketing (MailChimp)	Maximum values accepted by some fields in Sage CRM were shorter than their counterparts in MailChimp.	This issue is fixed.
0-165529-QA	E-Marketing (MailChimp)	It was not possible to save the MailChimp API key and list ID in Sage CRM.	This issue is fixed.
0-168993-QA	E-Marketing (Sage CRM)	When a user sent an email to a group, duplicate emails were sent to the same recipient.	Cannot reproduce.
0-168561-QA	Exchange Integration	When Exchange synchronization was enabled, it wasn't possible to save changes in <My Profile> Users User Configuration.	This issue is fixed.
0-167486-QA	Find/Advanced Find	When using an apostrophe (') in Advanced Find, a "Bad request" error occurred.	Cannot reproduce.
0-168673-QA	GCRM Integration	When a user tried to add a line item to a quote, an error occurred.	Cannot reproduce.
0-168691-QA	Groups / Target Lists	Private groups weren't visible to system administrators.	This issue is fixed.
0-167645-QA	Groups/Target Lists	Group descriptions didn't show in My CRM Groups.	Cannot reproduce.

Issue ID	Area	Description	Status
0-169199-QA	Groups/ Target Lists	Clicking Send Email on a group opened a blank email template.	Cannot reproduce.
0-168945-QA	Interactive Dashboard	When a user filtered companies in a list gadget by their name, companies whose name included a non-English character (such as an umlaut) didn't show up in the results.	This issue is fixed.
0-169304-QA	Interactive Dashboard	When a user accessed Sage CRM using an external IP address, the Interactive Dashboard gadgets didn't work.	This issue is fixed.
0-166220-QA	Interactive Dashboard	"Error loading data" was displayed on the Assigned Users tab of a dashboard template.	This issue is fixed.
0-169020-QA	Interactive Dashboard	A list gadget based on Advanced Find returned a SQL error when a user clicked the Action button.	This issue is fixed.
0-169050-QA	Interactive Dashboard	LinkedIn search performed on a list gadget returned a 404 error.	Cannot reproduce.
0-169195-QA	Interactive Dashboard	Appointments didn't show in a gadget based on My calendar template.	Documentation issue: time zone set in Sage CRM and in the Windows settings on the Sage CRM server must match. Documentation was updated.
0-168429-QA 0-168708-QA	Interactive Dashboard	When a user selected Relative and Week in the report search criteria, the report didn't return data for the last seven days.	By design. Documentation updated.
0-168665-QA	Interactive Dashboard	On a Sage 300 integration, creating a gadget based on a group returned an error.	This issue is fixed.
0-167614-QA	Interactive Dashboard	Cross tabular and historical reports were not available for a new chart gadget.	By design. Documentation updated.

Issue ID	Area	Description	Status
0-167143-QA	Keyword Search	When using a single or double quotes in Keyword Search, an "HTTP 400" error occurred.	This issue is fixed.
0-168472-QA	Leads	Date only fields were shown in the Sage CRM UI as date and time fields.	This issue is fixed.
0-168991-QA	Leads	The lead_updateddate field value of a record was updated after the record was viewed.	This issue is fixed.
0-166701-QA	Licensing	When the calendar was set as the default page, the message about Sage CRM license expiry didn't show up.	Cannot reproduce.
0-169366-QA	Lite Outlook Plugin	When a user tried to file an email containing an emoji icon, an error occurred.	This issue is fixed.
0-168896-QA	Mail Merge	When the Sage 200 Connector was installed, Mail Merge didn't populate the Company Name field.	This issue is fixed.
0-167666-QA	Mail Merge	The Edit Attachment button was missing in Google Chrome.	By design. The Edit Attachment button uses the ActiveX framework which is not supported in Chrome.
0-169277-QA	Mail Merge	When a user exported or merged data to Microsoft Word, fields in the document were not populated with values.	Updated documentation to mention that the Insert Nested Region link needs to be used when present.
0-169204-QA	Mobile App	Users experienced the following issues: ISSUE 1 The Interactive Dashboard didn't work when Sage CRM was accessed using an external IP address. ISSUE 2 The Download Data option in the Sage CRM for iPhone app didn't work.	These issues are fixed.

Issue ID	Area	Description	Status
0-166383-QA	Mobile Theme	A custom field of type WWW URL wasn't clickable in the Sage CRM UI.	This issue is fixed.
0-167085-QA	Mobile Theme	When a user added a new communication to a company, a validation error occurred.	This issue is fixed.
0-169414-QA	Mobile Theme	When the pers_phonenumber field was added to the Summary screen, the Number field listed the same phone number twice.	This issue is fixed.
0-166601-QA	Mobile Theme	When a user tapped a Date/Time field on a tablet, no available time values displayed.	This issue is fixed.
0-166187-QA	Notification	On-screen notifications displayed a notification ID instead of notification text.	This issue is fixed.
0-169234-QA	Opportunities	When an opportunity record was created automatically, its oppo_forecast field value displayed "Currency not set".	This issue is fixed.
0-167336-QA	Opportunities	In My CRM Opportunities and Team CRM Opportunities , the Company text box was populated with the name of the last viewed company.	This issue is fixed.
0-167568-QA	Outlook Integration	Some information on the File Email screen was hidden when the browser window zoom was set to more than 100%.	Cannot reproduce.
0-169035-QA	Outlook Integration	After upgrading Sage CRM, some options in <My profile> Administration Users User Configurations were set to the wrong values.	This issue is fixed.
0-169230-QA	Outlook Integration - Classic	When a user tried to file an email containing an emoji icon, an error occurred.	This issue is fixed.
0-169044-QA	Outlook Integration - Classic	The filed icon (a globe) wasn't displayed on filed emails in Microsoft Outlook.	This issue is fixed.

Issue ID	Area	Description	Status
0-168889-QA	Outlook Integration - Classic	Tasks and appointments created in Outlook didn't show in Team CRM Calendar .	This issue is fixed.
0-168797-QA	Outlook Integration - Classic	Appointments created in Sage CRM were missing from Team CRM Calendar .	This issue is fixed.
0-164857-QA	Outlook Integration - Classic	When using the Classic Outlook Plugin, a "CRM Outlook Plug-in encountered a problem during the operation" error occurred.	Cannot reproduce.
0-168368-QA	Outlook Integration - Exchange	When a user tried to attach a global document, an error occurred.	This issue is fixed.
0-168957-QA	Outlook Integration - Exchange	When a user filed an email with an attachment against multiple companies, the attachment wasn't filed for some companies.	This issue is fixed.
0-167722-QA	Outlook Integration - Exchange	An outgoing email was filed as incoming.	This issue is fixed.
0-166719-QA	Quotes/Orders	Selecting a value in a Search Select Advanced field caused the screen to automatically scroll up.	By design.
0-166722-QA	Quotes/Orders	Total values on the Order screen were positioned under the wrong table columns.	By design.
0-168727-QA	Quotes/Orders	When a user changed the discount percentage in a quote record, the total amount was not recalculated. This issue occurred in Internet Explorer only	This issue is fixed.
0-167878-QA	Reports	In reports, Start Date/Time value of a task was displayed in the Due Date/Time column and vice versa.	This issue is fixed.
0-166334-QA	Reports	Charts were missing from reports exported to PDF or Microsoft Excel.	This issue is fixed.

Issue ID	Area	Description	Status
0-169288-QA	Reports	When a user exported a report to an Excel file, the file showed dates in the wrong format.	This issue is fixed.
0-167270-QA	Reports	When a report was exported to Microsoft Excel, numerical values were formatted as text.	Cannot reproduce.
0-169100-QA	Sage CRM Connector	When a user selected the Post to Finance option on a Sage 200 integration, duplicate company records were created in the database.	Cannot reproduce.
0-168990-QA	User Interface	The New Record button was available to users who didn't have rights to create new records.	This issue is fixed.
0-167881-QA	User Interface	When a user clicked Back in the web browser to go to a previous company record, top content displayed information about the wrong company.	This issue is fixed.
0-168850-QA	User Interface	The Save and Cancel buttons were missing from some screens.	This issue is fixed.
0-168834-QA	User Management	When a system administrator created a new user from a template that had the Mail Merge to Word option set to Yes , in the created user record that option was blank.	Cannot reproduce.
0-168662-QA	User Management	The value selected in the Mail Merge To Word option in user properties was not saved.	Cannot reproduce.
0-164977-QA	Web Services	Web Services read user passwords from the Sage CRM database instead of using IIS auto login.	This issue is fixed.
0-169157-QA	Web Services	Data stored in the log files on the Sage CRM server wasn't encrypted properly.	This issue is fixed.
0-163731-QA	Web Services	Data in the log files stored on the Sage CRM server wasn't encrypted properly.	This issue is fixed.

Issue ID	Area	Description	Status
0-167127-QA	Workflow	Communication records weren't created for emails that were automatically sent using an escalation rule.	This issue is fixed.
0-165651-QA	Workflow	A workflow that contained the Mail Merge action caused formatting issues in top content.	Cannot reproduce.

Upgrading

You can use the Sage CRM 2017 R3 installation package to upgrade from versions 2017 R2, 2017 R1, 7.3 SP3, 7.3 SP2, 7.3 SP1, 7.3, and 7.2.

Note: Sage CRM 7.2 is no longer supported, but you can still upgrade directly from 7.2 to 2017 R3.

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.