Sage CRM 2017 R3
Software Requirements and Mobile Features

Updated: May 2018

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Software requirements

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

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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 R3 release.

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

Sage CRM server

Requirement	Details
Operating system	- Microsoft Windows Server 2016 - Microsoft Windows Server 2016 Essentials - Microsoft Windows Server 2012 R2 - Microsoft Windows Server 2012 R2 Essentials - Microsoft Windows Server 2012 - Microsoft Windows Server 2012 Essentials
Web Server (IIS)	The computer on which you plan to install Sage CRM must have the **Web Server (IIS)** 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: - Microsoft Windows Server 2016 Essentials - Microsoft Windows Server 2012 R2 Essentials - Microsoft Windows Server 2012 Essentials On these operating systems Sage CRM does not support HTTPS, Remote Desktop Services, and CDONTS/CDOSYS.

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 without SP or with SP1, Standard or Enterprise
- Microsoft SQL Server 2014 SP1 or SP2, Standard or Enterprise
- Microsoft SQL Server 2012 SP3, Standard or Enterprise

Microsoft SQL Server 2014 Express supplied with Sage CRM is provided for demonstration and testing purposes only. It is not suitable for a production environment because of the following limitations:

- Maximum memory utilized (per instance of SQL Server Database Engine): 1 GB
- Maximum relational database size: 10 GB

For detailed information about all Microsoft SQL Server 2014 Express limitations, see Features supported by the editions of SQL Server 2014 on msdn.microsoft.com.

Web browsers

You can access Sage CRM with the following web browsers:

Browser	Must be installed on
Microsoft Internet Explorer 11 - 32-bit edition only. - Compatibility View is not supported.	- Windows 10 - Windows 8.1 - Windows 7
Microsoft Edge	Windows 10
Mozilla Firefox (latest version)	- Windows 10 - Windows 8.1 - Windows 7
Google Chrome (latest version)	- Windows 10 - Windows 8.1 - Windows 7
Google Chrome for Android	Android KitKat 4.4 and later

Browser	Must be installed on
Apple Safari 10	• macOS X Sierra (10.12) • OS X El Capitan (10.11)
Apple Safari 9	OS X El Capitan (10.11)
Apple Safari for iOS	iOS 9.x and 10.x

- 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 10.x
iPad	iOS 9.x or 10.x

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 • 32-bit edition only. • Compatibility View is not supported.	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.

CTI plugin

The CTI (Computer Telephony Integration) plugin requires the following:

Requirement	Details
Microsoft Internet Explorer 11 • 32-bit edition only. • Compatibility View is not supported.	Access Sage CRM with this web browser to install and use the CTI plugin.
Be a system administrator or power user on your computer	Required to install the CTI 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	Supports Outlook supplied with: • Microsoft Office 2016 32-bit editions (Home, Business, and Professional) • Microsoft Office 2013 32-bit editions (Home, Business, and Professional) • Microsoft Office 2010 32-bit editions (Home, Business, and Professional) • Microsoft Office 365 You must have the 32-bit desktop version of Outlook app installed on your computer.	Supports Outlook supplied with: • Microsoft Office 2016 32-bit and 64-bit editions (Home, Business, and Professional) • Microsoft Office 2013 32-bit and 64-bit editions (Home, Business, and Professional) • Microsoft Office 2010 32-bit and 64-bit editions (Home, Business, and Professional) • Microsoft Office 365 You must have the 32-bit or 64-bit desktop version of Outlook app installed on your computer.
Microsoft Exchange	See Microsoft Exchange in this document.	
Microsoft .NET Framework	Make sure the following versions are installed on client computers: • Microsoft .NET Framework 4.6 • Microsoft .NET Framework 3.5	
Microsoft Internet Explorer 11 • 32-bit edition only. • Compatibility View is not supported.	Access Sage CRM with this web browser to install and use the Outlook plugins.	

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	• Publish desktops • Publish applications

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: • Windows Server 2016 Standard • Windows Server 2012 R2 Standard or Datacenter	HTTP, HTTPS	Publish full desktop

Virtualization

Sage CRM can run on any virtualization environment.

Features available on mobile devices

- 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	✔		