



Sage CRM 2019 R1 Release Notes

Updated: September 2019

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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 2019 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 2019 R1 to install specific product modules such as **Sales**, **Marketing**, and **Service** (or combinations of these modules). For more information on the availability of modules and the configurations available in your region, please contact your local Sage office.

When installing Sage CRM 2019 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 |
|---------------|-----------------|----------|
| February 2019 | eWare.dll | 2019.0.1 |
| | Outlook plugin | 2019.0.1 |
| | Document plugin | 2019.0.1 |
| | CTI plugin | 2019.0.1 |

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2019 R1.

For more information about the software with which Sage CRM 2019 R1 can work and integrate, see the *Sage CRM 2019 R1 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](#).

Note: Translated help and guides have been discontinued. Only English documentation is now supplied with Sage CRM.

New features and enhancements

Sage CRM 2019 R1 provides new features and enhancements in the following areas:

- [Calendar](#)
- [Database](#)
- [Document Drop](#)
- [Email and SMS](#)
- [Escalation rules](#)
- [Groups](#)
- [Quick Find](#)
- [Reports](#)
- [Security](#)
- [Setup](#)
- [Web Server \(IIS\)](#)

Calendar

View all your tasks and appointments in the calendar (0-170652-ENH). Each Sage CRM user can view a complete list of their tasks and appointments in **My CRM | Calendar List**. By default, the list isn't filtered and shows all tasks and appointments from the moment when the user was created in Sage CRM.

Database

Connect to the database server using its IP address (0-170682-ENH). You can configure a new or existing install of Sage CRM to connect to the database server using its IP address rather than its name in the connection strings. Complete the relevant steps below.

To configure a new install of Sage CRM

1. Run the **setup.exe** file supplied with the installation package and step through the setup wizard.
2. On the Database Selection step, select **Existing Microsoft SQL Server**.
3. On the Database Server Login step, enter the database server IP address in the **Database Server** option.
4. Complete the wizard.

To configure an existing install of Sage CRM

Step 1: Change the administration settings

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | System | Database**.
3. Click **Change**.
4. In the **Default Database Server (SQL Server Only)** option, replace the database server name with its IP address.
5. Click **Save**.


Step 2: Update the database properties files

1. Open the Sage CRM installation folder.
By default, this is `%ProgramFiles(x86)%\Sage\CRM\CRM`.
2. Locate the following files:
 - `tomcat\webapps\crmj\WEB-INF\db.properties`
 - `tomcat\webapps\crmExchangeSyncEngine\WEB-INF\db.properties`
3. Open and edit each `db.properties` file as follows:
 - a. Under the **#SQL Server settings** element, locate the `db.url` property.
 - b. In the property value, replace the database server name with its IP address.
For example:
`db.url=jdbc:log4jdbc:sqlserver://10.2.88.5:1433;databaseName=CRM;language=English;`
where `10.2.88.5` is the database server IP address.
 - c. Save your changes.

Document Drop

Using Document Drop on custom entities (0-165306-ENH). Users accessing Sage CRM with Microsoft Internet Explorer can now use the ActiveX Document Drop plugin to attach documents to custom entity records.

To enable this functionality, a system administrator must set the following fields to **Yes**:

-  | Administration | E-mail and Documents | Documents & Reports Configuration | Allow ActiveX Document Drop
- <User> | User Preferences | Use ActiveX Document Drop on Internet Explorer

Email and SMS

File emails with an empty To or From field (0-170336-ENH). Now you can use the Outlook Plugin to file emails whose **To** and/or **From** field is empty. Previously an error occurred when a user tried to file such an email.

Escalation rules

Descriptive values in the Updated By field (741-170969-ENH). When an escalation rule updates a record, the **Updated By** field now shows a descriptive value indicating that the update was performed by the Escalation Service. Previously in this scenario the **Updated By** field included a non-informative value (for example, -1 or -2).

Groups

Extended Info Admin rights (0-170884-ENH). When creating or editing a group, an Info Admin can make that group available to all users: from **Available To**, select **All Users**. Previously only System Administrators had the right to make a group available to all users.

Quick Find

Quick Find cache and index improvements (0-171108-ENH). Quick Find has been optimized for a scenario where a system administrator adds more entities to the Quick Find index. Now Quick Find immediately includes the newly-added entities in the search index and returns them in search results. Previously Quick Find could return incomplete search results in the described scenario.

Reports

Improvements to the point chart (0-169291-ENH). The chart points have been made larger and now the points are not connected by straight lines.

Security

Increased security for user passwords (720-171099-ENH). Sage CRM 2019 R1 uses the *bcrypt* algorithm to generate hashes for user passwords. Bcrypt adds a salt (a random string of characters) to each password hash before storing it in the database.

System administrators can change the password hash strength using a new **Use Dynamic Password Hash Cost** field in **Administration | Users | User Configuration**. This field can take the following values:

- **Yes** (default). Enables optimum password hash strength based on the Sage CRM server hardware capabilities. Provides increased security but consumes more system resources because it increases the number of hashing rounds used to generate a password hash.
- **No** (not recommended). Disables optimum password hash strength. Provides weaker security (less hashing rounds) but frees up system resources. System administrators might want to set this value to speed up the system performance, for example, when there is a high number of simultaneous Sage CRM user logins.

Note: The bcrypt algorithm is applied only when a user password is changed. Existing user passwords are not re-hashed using bcrypt after upgrading Sage CRM.

All password hashes generated using bcrypt are prefixed with double carets (^) in the `user_password` field of the `Users` database table.

Example:

```
^^CEDCGBCEDBDCCEEgGhGHFFeCFKGEHGDBGGEPFKDJHDEEEOGKEKGCGIHBHFFDHDGHECPGHEFGKGCE
```

Setup

Improved warning about missing objects. Ability to keep upgrade log history (685-171343-ENH). The warning about missing objects has been updated to provide information about missing database tables and views that relate to MailChimp Integration only. Previously the warning listed all missing custom screen objects including those not in use, which caused confusion.

The Setup now appends the `_<timestamp>` suffix to the folders containing logs from the previous Sage CRM upgrade. This allows system administrators to maintain the complete upgrade log history. Previously the Setup kept logs for the last upgrade only, older upgrade logs were automatically overwritten.

Web Server (IIS)

Extended browser support for the automatic login feature (0-170982-ENH). Authenticated Active Directory users can now access Sage CRM without entering their user name and password when they are using Google Chrome or Mozilla Firefox. Previously automatic login was supported for Microsoft Internet Explorer only.

For more information about setting up automatic login, see "Configuring automatic login" in the *System Administrator Help*.

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2019 R1.

Note: After you install Sage CRM 2019 R1, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

| Issue ID | Area | Description | Status |
|---------------|----------------------|--|---|
| 389-170953-QA | Comms/Diary | The Person field of an appointment related to a case wasn't populated. | This issue is fixed. |
| 0-170899-QA | Comms/Diary | When a user created an advanced search that looked for companies, exported the found companies to an Excel CSV file, and then created a task, all instances of the task were listed on the Communications tab for one company only. | This issue is fixed. |
| 674-171204-QA | Comms/Diary | When a user created a new appointment or task, the top content showed the details of the previous record. | This issue is fixed. |
| 0-170850-QA | Companies / People | Deleting an account caused all account persons to be deleted from the related company as well. As a result, the company could have no persons associated with it. | This issue is fixed. Now primary person is not deleted from company when account is deleted. |
| 0-171173-QA | Component Management | The creation of a new component failed with an error. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---------------|----------------------|--|--|
| 674-170985-QA | Component Management | When a system administrator cleared the Search on all view fields check box, this change wasn't recorded in the component. | This issue is fixed. |
| 674-171247-QA | Component Management | After installing a report with saved searches from a component, some of the searches were missing from the report. | This issue is fixed. |
| 0-170175-QA | Core Product | <p>Inline image wasn't displayed properly in email body.</p> <p>This issue occurred only when the inline image file name had one or more blank spaces.</p> | <p>This issue is fixed for new image files added to Sage CRM.</p> <p>To fix this issue for existing image files, remove the files from Sage CRM, edit the file names to remove blank spaces, and add the files back to Sage CRM.</p> |
| 674-171221-QA | Core Product | IP mismatch issues occurred in an environment where all client computers had fixed IP addresses. | Won't fix. |
| 733-171286-QA | Core Product | When a user clicked the Save button several times in a row while creating a quick appointment, it caused Sage CRM to create several quick appointments. | This issue is fixed. |
| 674-171351-QA | Core Product | It was possible to access a custom entity record from different computers using the same access URL. | This issue is fixed. |
| 674-171340-QA | Core Product | When a user created a duplicate Person record, Sage CRM didn't redirect the user to the deduplication screen. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---|-------------------------|--|----------------------|
| 0-170220-QA | CTI | The CTI plugin didn't work on a Windows 8-based computer. | This issue is fixed. |
| 0-169640-QA | Customization | Blank lines were inserted in the code added to the CreateScript , ValidateScript , and OnChangeScript fields. | This issue is fixed. |
| 394-171255-QA | Customization | When a comma was set as a decimal point in the user preferences, the <code>crm.fields</code> method provided in the Client-side API returned numeric field values incorrectly. | This issue is fixed. |
| 674-171164-QA | Customization | Workflow progress page displayed an error in the top content area for custom entities. | This issue is fixed. |
| 0-170657-QA | Customization | When a user clicked New Appointment on the Communications tab of a custom entity record, the top content area showed wrong details. | This issue is fixed. |
| 0-170792-QA | Deduplication | The Company Name Cleanup option converted company names from uppercase to lowercase. | This issue is fixed. |
| 0-170812-QA | E-Marketing (MailChimp) | Territory was incorrectly set in a communication created by a MailChimp campaign. | This issue is fixed. |
| 389-170949-QA 0-170793-QA 756-171175-QA | Email Client | When a user sent an email containing an attached file whose name included non-English characters, the file wasn't sent with the email. | This issue is fixed. |
| 0-170922-QA | Email Client | Carriage return (CR) characters were missing in emails sent from Sage CRM. As a result, such emails were rejected by mail servers. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---------------|----------------------|---|---|
| 741-171121-QA | Email Client | When Sage CRM was accessible externally via FQDN, response URLs in consent emails didn't work. | Documentation has been updated. For details on how to configure consent URLs, see " Modifying the consent email templates " in the Sage CRM 2019 R1 <i>System Administrator Help</i> . |
| 389-171159-QA | Email Manager | When Email Manager was configured to save attachments in a folder whose name contained non-English characters, an error occurred when saving an attachment. | This issue is fixed. |
| 766-171144-QA | Export Data | When a report containing an integer field was exported to an Excel file, an error occurred. | This issue is fixed. |
| 674-171129-QA | Find / Advanced Find | When a non-admin user started typing a recipient's name in the To field of a new email, Sage CRM didn't provide a list of all matching recipients. | This issue is fixed. |
| 674-170852-QA | Find / Advanced Find | Quick Find returned incomplete or no search results when the Sage CRM database contained 100,000+ records. | This issue is fixed. |
| 774-171269-QA | GCRM Pricing Service | On a Murano integration, the <code>enteredPrice</code> amount was returned inconsistently (sometimes as 0 , and sometimes as null). | By design. A solution resolving this issue in Sage Murano has been provided to the partner. |

| Issue ID | Area | Description | Status |
|---------------|-----------------------|--|---|
| 741-170964-QA | General issue | When Sage CRM was configured to use HTTPS, some components were marked with a red cross in the System Health area even though they were working properly. | This issue is fixed. |
| 0-170548-QA | Install / Upgrade | After upgrading Sage CRM, the Logo.jpg and PDFLogo.jpg files were overwritten. | By design. WORKAROUND <ol style="list-style-type: none"> 1. Before upgrading, create a new folder in the directory specified in Administration Email and Documents Documents & Reports Configuration Physical root directory for mail merged documents. 2. Store the Logo.jpg and PDFLogo.jpg files in the new folder. 3. Upgrade Sage CRM. |
| 0-171149-QA | Interactive Dashboard | When a user created a new list gadget, an error occurred. | This issue is fixed. |
| 0-170474-QA | Interactive Dashboard | Custom Interactive Dashboard gadgets stopped working after upgrading Sage CRM. | By design. |

| Issue ID | Area | Description | Status |
|---------------|---------------------------|---|----------------------|
| 674-170957-QA | Interactive Dashboard | An Interactive Dashboard gadget using a content block didn't work. | This issue is fixed. |
| 761-171018-QA | Keyword Search | When a user typed in Quick Find, a login prompt dialog opened. This issue occurred only when the Log Me In To field in the user preferences was set to Splash Screen . | This issue is fixed. |
| 741-171196-QA | Leads | When a user clicked Add or Find this Company on a lead, and then specified an existing company, the company details were not populated. | This issue is fixed. |
| 756-171210-QA | Leads | When a user converted a lead to a company, nothing happened. | This issue is fixed. |
| 729-171238-QA | Mail Merge | When a user clicked Print Order or Print Quote , an error occurred. | This issue is fixed. |
| 0-171154-QA | Navigation | When a user clicked the scroll bar in the list of Quick Find search results, the list disappeared. | This issue is fixed. |
| 0-171028-QA | Opportunities | Adding a new field (<code>oppo_weightedforecast</code>) to the OpportunityStatusBox screen caused an error. | This issue is fixed. |
| 674-171258-QA | Order Entry / Products | After fields were added to the FinancialDetailsOrderBox screen, some fields on the screen were misaligned. | This issue is fixed. |
| 0-170503-QA | Performance / Scalability | Sage CRM screens took a long time to load. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---------------|----------------------|---|--|
| 756-171297-QA | Quotes / Orders | When a user searched for and opened a quote record, an error was written to the Sage CRM log. This issue was observed on Sage Murano integrations. | By design. A solution resolving this issue in Sage Murano has been provided to the partner. |
| 765-171216-QA | Reports | When a report was exported to a PDF file, some columns in the report were resized and the values got truncated. | By design. WORKAROUND Set a larger page format (A3 or A2). |
| 674-171244-QA | Reports | After installing a report with a saved search from a component, the name of the saved search was changed to Default . | This issue is fixed. |
| 0-170801-QA | Reports | When a user exported a report to a file, an error occurred. | This issue is fixed. |
| 756-171232-QA | Reports | When a communications report was exported to a PDF file, some columns in the report were too wide. | By design. WORKAROUND Set a larger page format (A3 or A2). |
| 733-171359-QA | Reports | When a user exported a report to a PDF file, the file included an incomplete legend. | This issue is fixed. |
| 0-170838-QA | Third-party Software | When the Account entity was enabled, the value of the <code>acc_primarypersonid</code> field was changed every time a new Person record was created. | This issue is fixed. |
| 394-171095-QA | User Interface | After upgrading Sage CRM, a custom button based on a custom .asp file stopped working. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---------------|-----------------|--|----------------------|
| 394-171074-QA | User Interface | <p>When a system administrator accessed the following areas using Internet Explorer, action buttons were missing from the screen:</p> <ul style="list-style-type: none"> • Administration Email and Documents Email Configuration • Administration Users Users | Cannot reproduce. |
| 685-171212-QA | User Interface | When a user tried to create a duplicate Person record, Sage CRM repeatedly prompted the user to ignore the warning and enter the person details. As a result, it wasn't possible to create the record. | This issue is fixed. |
| 0-170948-QA | User Management | The calendar failed to load, returning an internal server error. | This issue is fixed. |
| 389-170905-QA | Web Services | The Web Services API removed parentheses from SQL queries. | This issue is fixed. |
| 685-171211-QA | Web to Lead | <p>When a user entered lead details in the Web to Lead form and clicked Save and Submit, an error occurred.</p> <p>Also some of the entered lead details (for example, source) weren't saved in Sage CRM.</p> | This issue is fixed. |
| 756-171153-QA | Workflow | On some screen resolutions, it wasn't possible to access workflow buttons. | Cannot reproduce. |
| 720-171118-QA | Workflow | When a user viewed a custom entity record, the top content area showed wrong details. | This issue is fixed. |

| Issue ID | Area | Description | Status |
|---------------|----------|---|----------------------|
| 0-170771-QA | Workflow | An email sent by an escalation rule didn't appear on the Communications tab for the corresponding record. | This issue is fixed. |
| 766-171341-QA | Workflow | <p>An email created by a workflow failed to send to all recipients. This happened because of the following:</p> <ul style="list-style-type: none"> • An extra semicolon (;) was inserted as a separator in the To or Cc field. • A Sage CRM field added to the To or Cc field (for example, #oppo_salesrep1#) wasn't associated with a user. | This issue is fixed. |
| 663-171155-QA | Workflow | An appointment created by a workflow was read only. | This issue is fixed. |

Upgrading

You can use the Sage CRM 2019 R1 installation package to upgrade from versions 2018 R3, 2018 R2, 2018 R1, 2017 R3, 2017 R2, and 2017 R1.

To upgrade from an earlier version of Sage CRM, please first upgrade to one of the versions listed here.

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: Install only one Sage CRM instance per server. Sage doesn't support configurations where two or more Sage CRM instances are installed on the same server.