Sage CRM 2018 R3
Release Notes

Updated: August 2018

Contents

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 2018 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 2018 R3 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 2018 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
August 2018	eWare.dll	2018.0.3
	Outlook plugin	2018.0.2
	Document plugin	2018.0.1
	CTI plugin	2018.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2018 R3.

For more information about the software with which Sage CRM 2018 R3 can work and integrate, see the *Sage CRM 2018 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 2018 R3 provides new features and enhancements in the following areas:

- Calendar
- Quick Find
- MailChimp Integration
- Supported character sets
- Setup

Calendar

The calendar has the following new features and enhancements:

- Create quick appointments for other users
- View calendar items as a list

Create quick appointments for other users

You can now use the quick method to create appointments in My CRM calendar of other users (0-170462-ENH). Both you and the user to whom the calendar belongs are added to the **User** field of the appointment you create.

1. Click **My CRM | Calendar**.
2. Open one of the following calendar views:
   - **Day**
   - **Work Week**
   - **Week**
3. Open the calendar of the user for whom you want to create an appointment:
   a. In the **Find** text box in the top left corner, type the name of the user.

      If **My CRM for** list is not updated automatically, click 🔍 to find the user.

   b. Select the user from the **My CRM for** list, and then click ➔.
4. Double-click anywhere in the calendar grid to create an appointment.

View calendar items as a list

To use screen space more efficiently, you can view all items in **My CRM** calendar as a list. Users can sort, filter, edit, or delete calendar items in the list. System administrators can customize the list appearance.

- To view calendar items as a list, click **My CRM | Calendar List**.
- To edit a list item, double-click it, make your changes, and then click **Save**.
- To delete a list item, double-click it and then click **Delete**.

Filter calendar list

You can filter the calendar list using the funnel icon that is displayed beside each column heading. The appearance of the funnel icon can indicate the following:

- The list isn't filtered by this column.
- The list is currently filtered by this column.

To apply a filter:

1. Go to **My CRM | Calendar List**.
2. Click beside the heading of the column by which you want to filter the list.
3. Specify your filter criteria and click **Apply**.

   You can filter the list by multiple columns.

To clear or modify a filter:

1. Go to **My CRM | Calendar List**.
2. Click beside the heading of the column whose filter you want to clear or modify.
3. Do one of the following:
   - Click **Clear**.
   - Modify your filter criteria and click **Apply**.

Sort calendar list

Click the heading of the column by which you want to sort the calendar list. The arrow that appears next to the column heading indicates one of the following:

- The list is sorted by this column in the ascending order.
- The list is sorted by this column in the descending order.

To disable sorting:

- Click the heading of the column until the arrow beside it disappears.

Refresh calendar list

When you view the calendar list and some other user creates a new item in the calendar, it doesn't appear in the calendar list until you refresh the list manually:

- Click the refresh icon ( ) in the bottom right corner of the calendar list.

Tip: We recommend that you manually refresh the calendar list regularly to ensure it displays all recently-created items.

Customize calendar list

As a system administrator, you can change the appearance of the Calendar List tab (0-170387-ENH). For example, you can add or remove columns, change the horizontal alignment of values in each column, and set the default list sorting mode.

1. Log on to Sage CRM as a system administrator.
2. Go to **<My Profile> | Administration | Customization | Communication**.
3. Click **Lists**.
4. Click **Calendar List**.
5. Use the provided options to add, remove, or update columns in the **Calendar List**.

   For detailed information, see the table below.
6. When you're done, click **Save**.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Desktop HTML List Contents</td><td>Shows the fields that are currently displayed as list columns in the Calendar List tab.

To remove a column from the tab:
1. Select the corresponding field in the list.
2. Click Remove.

To change the properties of a column:
1. Select the corresponding field in the list.
2. Configure options under Properties.
3. Click Update.</td></tr>
<tr><td>Field</td><td>Select the field you want to add to the Calendar List as a column. You can add only the following field types:
• Checkbox
• Date Only
• Date & Time
• Email Address
• Integer
• Multiline Text
• Numeric
• Phone Number
• Selection
• Text
• User Select
• WWW URL

Other field types are not supported even though they are present in the list. When you add a field whose type isn't supported, that field doesn't appear in the Calendar List.

Tip: To view the type of a field, go to <My Profile> | Administration | Customization | Communication | Fields tab.</td></tr>
<tr><td>Hyperlink to</td><td>Select the entity to which you want to hyperlink the entries in the column. For example, you can hyperlink a Person record to the corresponding Person or Company record.</td></tr>
</table>

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Alignment</td><td>Select how you want to horizontally align values in the list column.
Possible values:
Centre
Left
Right</td></tr>
<tr><td>Show Heading</td><td>Display or hide the field caption in the column heading.
Possible values:
Yes. Shows the field caption in the column heading.
No. Shows an empty column heading.</td></tr>
<tr><td>Default Order By</td><td>Enable or disable the default sorting of the list by the column.
Possible values:
Yes. Sorts the list in the ascending order using the column values.
No. Disables sorting by the column.
Note: Ensure you sort the list by one column only.</td></tr>
</table>

Quick Find

Search by postal address, email address, and phone number (0-170193-ENH). Quick Find has been improved to search for Person and Company records by their postal address, email address, and phone number. To search for records by phone number, enter the phone number you want to find or its part, do not enter any words.

The most relevant Person and Company records whose name, postal address, email address, or phone number contains all of your search terms are displayed at the top of search results. Then follow the records containing only some of your search terms.

MailChimp Integration

Note: Your account must have rights to use MailChimp campaigns.

New status (Closed) for MailChimp campaigns in Sage CRM (0-170244-ENH). A user can now set the status of a MailChimp campaign to *Closed*. This doesn't affect the campaign status in MailChimp. Closing MailChimp campaigns in Sage CRM is particularly convenient when you have a long list of campaigns and want to move some old or unused campaigns out of your way.

Warning: You cannot change the status of a closed campaign.

To close a MailChimp campaign in Sage CRM:

1. Click **My CRM | MailChimp Campaigns**.
2. Click the campaign hyperlink.
3. Click **Close Campaign**.
4. When prompted if you want to close the campaign, click **Yes**.

When you have closed MailChimp campaigns, you can filter the list to display the campaigns with which you want to work:

1. Click **My CRM | MailChimp Campaigns**.
2. Under **Status**, select the status by which you want to filter the campaigns.
   For example, you can select **--All--**, **Closed**, **Saved**, or **Sent**.
3. Click **Filter**.

Supported character sets

Better support for Unicode characters in email messages (0-170033-ENH). We have improved support for Unicode characters (including special characters and emojis) encoded with two, three, or four bytes in UTF-8. The improvements were implemented for email messages filed by the Email Manager, Classic Outlook Plugin, or Lite Outlook Plugin.

Setup

Enhanced error handling (0-170012-ENH). Sage CRM Setup has been improved to verify the integrity of the MailChimp Integration-related database tables and views during upgrading. If an issue is found, Sage CRM Setup displays an error message.

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2018 R3.

Note: After you install Sage CRM 2018 R3, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
0-168095-QA	Comms/Diary	When a user moved a Communication containing one or more attachments from one Opportunity to another, the attachments weren't moved together with the Communication.	This issue is fixed.
0-169135-QA	Groups/Target Lists	When a user excluded some records in a multipage static group and then moved to the next page, the records were included again.	This issue is fixed.
0-169685-QA	User Interface	Keyboard shortcuts didn't work in the Sage theme.	By design. The Sage theme is no longer supported.
0-170038-QA	Customization	The **Action** (comm_action) field didn't have the default value set for a new Communication record.	This issue is fixed.
0-170049-QA	Customization	Top content showed the details of a Person record that was accessed earlier.	This issue is fixed.
0-170057-QA	Workflow	A tracking note automatically created by an escalation rule showed the wrong duration.	This issue is fixed.

Issue ID	Area	Description	Status
0-170100-QA	Outlook Integration - Exchange	When a user filed an email in Microsoft Outlook, the File Email screen was displayed incorrectly. For example, some buttons were missing.	By design. The Compatibility View in Internet Explorer isn't supported.
0-170132-QA	Interactive Dashboard	An Interactive Dashboard gadget based on a report showed date and time instead of date only.	This issue is fixed.
0-170136-QA	Customization	When adding a **Custom Jump** hyperlink to a screen, some of the hyperlink settings were missing.	By design. The **Custom Jump** option isn't supported for screens.
0-170157-QA	Companies/People	Scripts added to the CompanyBoxLong screen didn't run in some situations.	This issue is fixed.
0-170206-QA	Reports	When a user created an Interactive Dashboard gadget based on a report, some fields were missing from the gadget.	This issue is fixed.
0-170059-QA	Cases	A person created in the context of a Case record wasn't assigned to the related account.	This issue is fixed.
0-170077-QA	Mail Merge	Some fields of the Person entity weren't merged.	This issue is fixed.
0-170078-QA	Active Directory	When a system administrator imported users from Active Directory, Sage CRM didn't display some users that were actually present in the Active Directory containers.	This issue is fixed.
0-170285-QA	Customization	The `CRM.Button` method worked incorrectly for users who didn't have Edit rights.	This issue is fixed.
0-170294-QA	Customization	Tasks that were scheduled for weekdays were shown as scheduled for completion on a weekend in the calendar.	This issue is fixed.

Issue ID	Area	Description	Status
0-170331-QA	Core Product	When a user pressed Enter in the built-in email editor, the cursor moved to the beginning of the email body. This issue occurred in the Edge web browser only.	This issue is fixed.
0-170243-QA	Interactive Dashboard	An Interactive Dashboard gadget based on a report showed communications for the wrong time period.	This issue is fixed.
0-170330-QA	Security Management	An "Authentication required, Browser session mismatch" error occurred when Sage CRM was configured to use browser session security and HTTPS.	This issue is fixed.
0-170333-QA	Mobile Theme	A SQL error occurred when a system administrator configured Sage CRM to display the **Notes** tab for the Lead entity in the Mobile theme.	By design. To display the **Notes** tab for the Lead entity: 1. Create a new view for the Notes entity. 2. Create a new list to display notes for the Lead entity. 3. Create a new list block for the Lead entity to display notes using the view and list you created in the above steps.
0-170342-QA	Mobile Theme	It wasn't possible to create and edit notes in the Mobile theme.	This issue is fixed.
0-170374-QA	Campaign Management	After renaming, groups were sorted in the wrong order.	This issue is fixed.
0-170352-QA	E-mail Manager	An error occurred when a user sent a mass email.	This issue is fixed.

Issue ID	Area	Description	Status
0-170337-QA	Outlook Integration - Exchange	An "Unexpected event" error occurred when a user filed an email.	This issue is fixed.
0-170371-QA	Mail Merge	When a user performed a mail merge, the top content element displayed the wrong information.	This issue is fixed.
0-170406-QA	Comms/Diary, Customization	ISSUE 1 A user was prompted to log on to Sage CRM when opening an appointment in the calendar. This issue occurred in the Apple Safari web browser only. ISSUE 2 When two Date & Time fields were present on the same screen, clicking the clock icon on one of these fields opened the list on the other field.	These issues are fixed.
0-170411-QA	User Interface	When Sage CRM was configured to use HTTPS, an authentication error occurred when users were switching between Sage CRM screens.	This issue is fixed.
0-170421-QA	Opportunities	A Person record created in the context of an Opportunity record wasn't linked to the related Company record.	By design.
0-170423-QA	Component Management	An error occurred when a user tried to script out a dashboard template whose name contained one or more apostrophes (`).	This issue is fixed.
0-170425-QA	Component Management	A dashboard gadget saved in a component failed to work after its installation on a new instance of Sage CRM.	This issue is fixed.
0-170458-QA	Reports	After exporting a report to Excel, some numeric values were formatted as text.	This issue is fixed.

Issue ID	Area	Description	Status
0-170299-QA	Interactive Dashboard	A list gadget based on a saved search displayed an error.	This issue is fixed.
720-170476-QA	.NET API	Pressing the Enter key didn't move the cursor to the next line in a multiline text field.	This issue is fixed.
0-170203-QA	Component Management	A carriage return (`\r`) and line feed (`\n`) were incorrectly processed by the Component Manager. As a result, extra blank lines were inserted in scripted out components.	This issue is fixed.
0-170485-QA	JavaScript API	The `crm.fields` method didn't return company data for a Lead record.	This issue is fixed.
0-170489-QA	Library and Templates	When a user selected a font for the output PDF file, the font used in the file was different.	This issue is fixed.
0-170316-QA	Comms/Diary	When a user clicked the **Send and File** button in Microsoft Outlook, an error occurred.	This issue is fixed.
0-170486-QA	Leads	When a user converted a Lead record to a Person record, some of the Person record fields weren't populated. For example, this issue affected the secondary email field (pers_email2).	This issue is fixed.
710-170509-QA	Core Product	When a user saved a custom script on the CompanyBoxLong screen, an extra white space was inserted into the script.	This issue is fixed.
0-170517-QA	Navigation	Adding an apostrophe (`) to the caption of a system menu item caused the menu item to stop working.	This issue is fixed.
0-170516-QA	Mail Merge	When a user clicked the **Cancel** button, the wrong screen opened. For example, this issue occurred when a user cancelled a Merge to Word or Merge to PDF operation.	This issue is fixed.

Issue ID	Area	Description	Status
0-170540-QA	Interactive Dashboard	When Sage CRM was configured to use HTTPS, commands on a notifications gadget (such as **Dismiss** or **Snooze**) didn't work.	This issue is fixed.
0-170551-QA, 746-170604-QA	Core Product	When a user attached a document to an Opportunity record, the document was also attached to a Case record.	This issue is fixed.
0-170585-QA	Leads	When a user converted a Lead record to a Company record, the **Assigned Manager** and **Territory** fields of the Company record weren't populated.	• Fixed for the **Account Manager** field. • By design for the **Territory** field.
0-170649-QA	Interactive Dashboard	Clicking the LinkedIn icon for a person in the Contacts gadget failed to open the corresponding LinkedIn page.	This issue is fixed.
0-170539-QA	E-mail Manager	The Email Manager (eWareEmailManager.exe) service failed to start.	This issue is fixed.
0-170676-QA	Groups/Target Lists	Filtering a list of groups by name didn't work.	This issue is fixed.
0-170742	Database	Product version number written to the Sage CRM database didn't contain the release identifier (for example, R1, R2, or R3).	This issue is fixed.
0-170722-QA	General Issue	Consent response URL in consent emails was broken because the public server name wasn't added to the `custom_sysparams` table in the Sage CRM database.	This issue is fixed.
720-170754-QA	Core Product	Self-service passwords stored in the Sage CRM database weren't encrypted properly.	This issue is fixed.

Issue ID	Area	Description	Status
11-170765	General Issue	All communications created by MailChimp Integration were assigned to the Worldwide territory.	This issue is fixed.
0-170734-QA	E-mail Client	Consent response URL in consent emails was broken because it included the local Sage CRM server name instead of its publicly available name.	This issue is fixed.
0-170662-QA	Performance/Scalability	Sage CRM calendar caused a performance degradation on client computers.	This issue is fixed.

Upgrading

You can use the Sage CRM 2018 R3 installation package to upgrade from versions 2018 R2, 2018 R1, 2017 R3, 2017 R2, 2017 R1, 7.3 SP3, 7.3 SP2, 7.3 SP1, and 7.3.

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.