



Sage CRM 2023 R1 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 2023 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 2023 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 2023 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	eWare.dll version
March 2023	20.23.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2023 R1.

For more information about the software with which Sage CRM 2023 R1 can work and integrate, see the *2023 R1 Hardware and Software Requirements* 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.

Installing and upgrading

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.

Installation prerequisites

Before installing or upgrading Sage CRM, make sure that:

- Your environment meets the *Sage CRM 2023 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).
- You have *Microsoft OLE DB Driver for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

[Download Microsoft OLE DB Driver for SQL Server](#)

You need to install driver version 18 or later. If you don't have this driver installed, the Sage CRM Setup cannot connect to the SQL Server.

Upgrade path

You can use the Sage CRM 2023 R1 installation package to upgrade from versions 2022 R2, 2022 R1, 2021 R2, 2021 R1, 2020 R2, and 2020 R1.


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

Note: Computer telephony integration (CTI) has been removed from Sage CRM 2023 R1 and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2023 R1 completely removes CTI.

Post-installation/upgrade tasks

- Sage CRM Setup cannot upgrade Microsoft SQL Server Express installed with a previous Sage CRM version. As a result, you may end up with Sage CRM using an unsupported Microsoft SQL Server Express version. If necessary, manually upgrade Microsoft SQL Server Express after upgrading Sage CRM.

For supported Microsoft SQL Server Express versions, see *Sage CRM 2023 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).

- Make sure that user passwords in Sage CRM are not blank. We test Sage CRM features in an environment where every user has a nonblank password assigned. If you have blank user passwords in your environment, Sage CRM features may behave unpredictably.
- 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.
- Clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly
- Re-enter the Sage CRM system administrator password after you have upgraded Sage CRM that is integrated with another system. This is required to hash and securely store the password.
 - a. Log on to Sage CRM as a system administrator.
 - b. Go to  | **Administration | Integration | Integration List** and click the integration for which you want to re-enter the password.
 - c. Select **Disable** and then select **Continue**.
 - d. Select **Change**.
 - e. In the **CRM Password** text box, re-enter the password.
 - f. Select **Save**.
 - g. Select **Enable**.

Note: You must re-enter the Sage CRM system administrator password using the steps above whenever you modify your integration.

Supported themes

The only supported Sage CRM theme is Contemporary.

We recommend that after installing or upgrading Sage CRM system administrators make sure that the Contemporary theme is set as the default theme.

For details, see *Changing the default theme* in the *Sage CRM 2023 R1 System Administrator Help* published on the [Sage CRM Help Center](#).

New features and enhancements

Sage CRM 2023 R1 provides the following new features and enhancements:

- **Edit files without installing plugin**
- **Enhanced email import**
- **View narrative summary for Company**
- **Customize Sage CRM login screen**
- **Allow file name extensions for upload**
- **Refreshed brand, enhanced accessibility**
- **Improved .NET documentation**
- **Support for new software**

Edit files without installing plugin

Feature ID: CRMS-23, CRMS-385, CRMS-1059, CRMS-1162

Users no longer need to install a plugin to view and edit a file attached to a Company or Task, or created using the Mail Merge feature. Now a user can download the file locally, open and edit it in the relevant application installed on their computer, and then upload the file back to Sage CRM.

This enhancement allows users to edit files in any web browser supported by Sage CRM. It also supports the retirement of Microsoft Internet Explorer 11.

Note: Currently Sage CRM doesn't support the editing of shared documents.

Edit file attached to Company or Task

1. Search for and open the Company or Task that has the file attached.
2. Download the attached file you want to view and edit:
 - For a Company, select the **Documents** tab, select the file name, and select **View/Edit File**.
 - For a Task, select the **Attachments** tab, select the file name, and select **View/Edit File**.
3. Open the downloaded file in the relevant application installed on your computer. Edit the file and save your changes.

Tip: You can specify the default download folder in [Login and session preferences](#), so that Sage CRM prompts you to open the downloaded file in the relevant application installed on your computer.

4. If you edited the file in step 3, return to Sage CRM, browse to select the file, and then select **Upload File**.

Warning: The name of the edited file you are uploading must match the file name displayed in the Sage CRM user interface. Windows may have renamed the file during the download if the target folder already contained a file with the same name. If so, rename the file before uploading it.

Edit file created with Mail Merge

1. Search for the record you want to use in the merge operation.
2. In the search results, select the records you want to use:
 - To use a single record, select the record, select the **Documents** tab, and then select **Merge to Word** or **Merge to PDF**.
 - To use all records in the search results, select **Merge to Word** or **Merge to PDF**.
3. Select the mail merge template you want to use.
4. If you want to see how your merged document is going to look, select **Preview Merge**. If you're merging multiple records, the preview shows only the first record in the group.
5. Select **Merge and Continue** and wait until your merge completes.

You can select **Create Communication** to create a new communication and attach the merged document to it. You can also view and edit the merged file. Otherwise, select **Continue**.

To view and edit the merged file:

- a. Select **View/Edit File** to download the file and open it in an application installed on your computer. Edit the file if necessary.

Tip: You can specify the default download folder in **Login and session preferences**, so that Sage CRM prompts you to open the downloaded file in the relevant application installed on your computer.

- b. If you edited the file, return to Sage CRM, browse to select the file, and then select **Upload File and Continue**.

Warning: The name of the edited file you are uploading must match the file name displayed in the Sage CRM user interface. Windows may have renamed the file during the download if the target folder already contained a file with the same name. If so, rename the file before uploading it.

6. If you earlier selected **Create Communication**, complete the **Details panel** fields and select **Save**.




Enhanced email import

Now users can import emails into Cases and custom entities, filter a list of emails to be imported, view into which record an email has been imported, and use the new steps in the documentation to enable a pre-2023 R1 custom entity for email import.

For instructions on how to enable and use the import of emails, see [Importing contacts and email messages from Exchange Online](#) in the *System Administrator Help*.

Import emails into Cases and custom entities

In the previous Sage CRM release, the import of email messages was available only on Companies, Persons, and Opportunities. In this release, users can also import emails into Cases and custom entities. The import of emails into Cases is working out of the box. To enable the import of emails for a custom entity, a system administrator needs to activate read-only SData external access for that entity:

1. Go to  | **Administration** | **Customization** | **<custom entity name>**.
2. On the **External Access** tab, select **Change** and set **Read-only SData** to **Yes**.
3. Select **Save**.
4. If the custom entity was created with a pre-2023 R1 version of Sage CRM, complete the additional steps in the next section.
5. Enable write access to the `comm_caseid` field of Communication. This is required so that users and info managers could view the Case into which an email is imported.
 - a. Go to  | **Administration** | **Customization** | **Communication**.
 - b. In the **Field Name** column, locate **comm_caseid**.
 - c. In the row where **comm_caseid** is located, select the edit button () in the **Field Security** column.
 - d. In the **Write Access** column, select **Allow**, and select **Continue**.

Now users can start importing emails into the custom entity.

UI improvements

When a user selects the **Import Emails** button and views a list of emails to be imported, they can:

- **Filter emails.** By default, the list displays all email messages residing in the Exchange Online folder selected by the user. This includes the messages that have been imported into Sage CRM earlier. Now users can select **Hide imported emails** to hide the messages that have already been imported into Sage CRM.
- **View the record into which an email has been imported.** This information is available in the **Filed Against** column added in this release. The **Filed Against** column uses the following formats to show the record against which a particular email has been filed. The column shows the parent Person and Company only if the record has them.

Entity	Format used in Filed Against column
Case	Case reference (parent Person name; parent Company name)
Company	Company name
Custom entity	Custom entity name (parent Person name; parent Company name)*
Note: The asterisk indicates that this is a custom entity record.	
Opportunity	Opportunity description (parent Person name; parent Company name)
Person	Person name (parent Company name)

Enable pre-2023 R1 custom entity for email import

To enable the import of emails for a custom entity created with a pre-2023 R1 version of Sage CRM, a system administrator needs to complete the below additional steps. These steps are not needed for custom entities created with Sage CRM 2023 R1 and later.

1. On a Sage CRM server, go to **<Sage CRM installation folder>\WWWRoot\CustomPages\<entity name>**.

The default Sage CRM installation folder is
%ProgramFiles(x86)%\Sage\CRM\CRM

2. Open the **<EntityName>Summary.asp** file in a code editor.
3. Locate the following line of code:

```
CRM.AddContent(Container.Execute(record));
```

4. Immediately above this line, insert the following code:

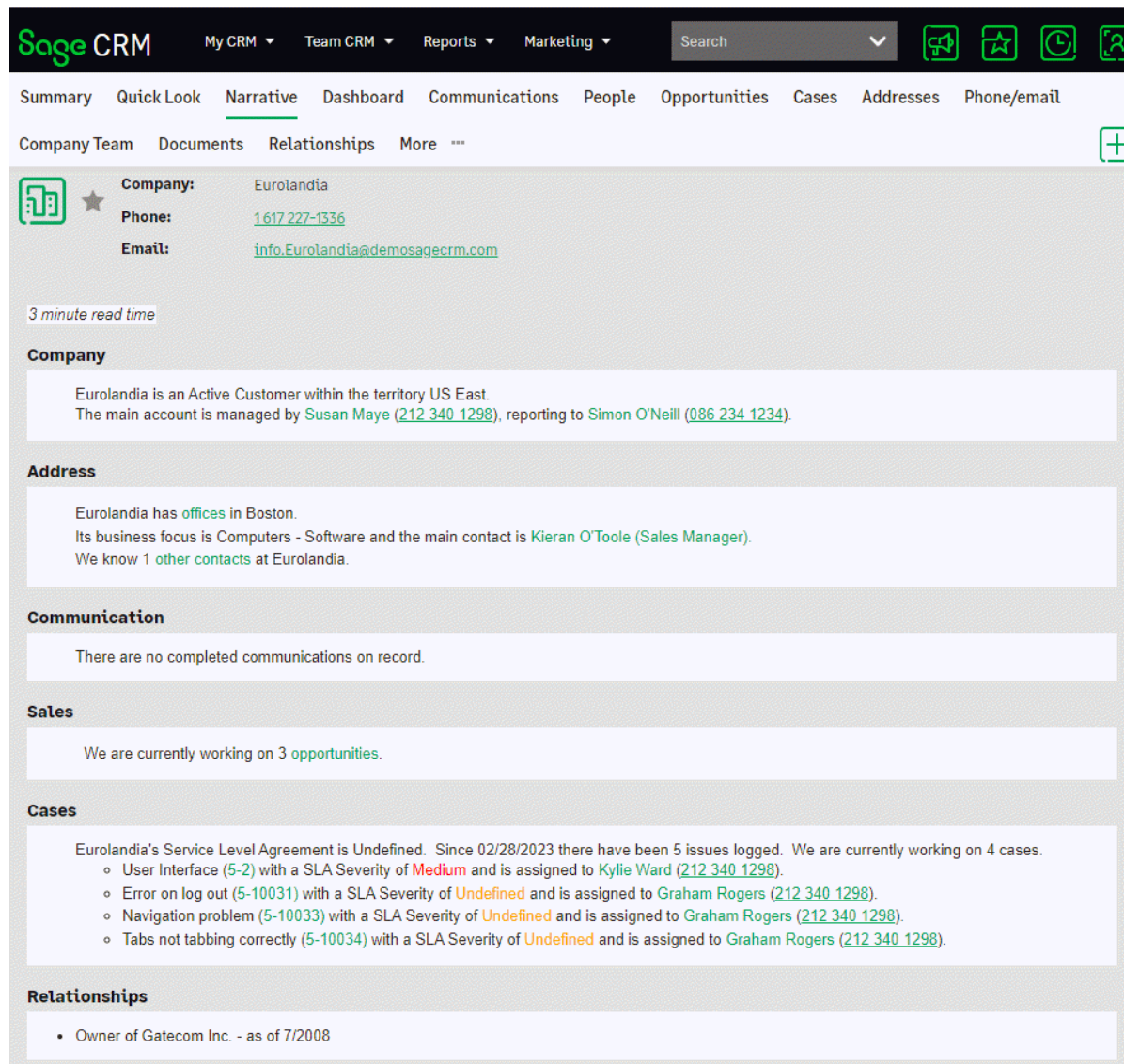
```
recObj = CRM.FindRecord("Custom_Tables", "Bord_Name='" + Entry.Title + "'");  
  
if ((true) && (recObj('Bord_HasCommunication') != undefined)) {  
    recObjOAuth = CRM.FindRecord("UserSettings", "USet_Key = 'EMC_AuthAccessToken' and USet_UserId = '"+CRM.GetContextInfo('User', 'User_UserId')+"'");  
  
    if ((true) && (recObjOAuth.RecordCount > 0)) {  
        Container.AddButton(CRM.Button("ImportEmails", "", CRM.URL(1362) + "&ImportMode=0&EntName=" + Entry.Title + "&EntIdField=" + recObj('Bord_IdField')));  
    }  
  
}
```

5. Save your changes.

View narrative summary for Company

Sage CRM 2023 R1 uses a deterministic artificial intelligence approach to generate and display a narrative report containing an executive summary and business insights for each Company.

This new feature automatically analyzes the sales, customer service, and communication data and presents it as a short and easy-to-understand narrative report on a **Narrative** tab displayed for each Company. In this Sage CRM release, the **Narrative** tab provides information in English only.



The screenshot shows the Sage CRM interface for a company narrative. The top navigation bar includes 'Sage CRM', 'My CRM', 'Team CRM', 'Reports', and 'Marketing', along with a search bar and utility icons. The main navigation menu is open, highlighting the 'Narrative' tab. Below the navigation, the company details for 'Eurolandia' are shown, including a star icon, phone number '1617 227-1336', and email 'info.Eurolandia@demosagecrm.com'. A '3 minute read time' indicator is present. The narrative is organized into sections: 'Company' (Active Customer in US East, managed by Susan Maye), 'Address' (offices in Boston, business focus on Computers - Software), 'Communication' (no records), 'Sales' (3 opportunities), 'Cases' (5 issues logged, 4 working), and 'Relationships' (Owner of Gatecom Inc. as of 7/2008).

Company: Eurolandia
Phone: [1617 227-1336](tel:16172271336)
Email: info.Eurolandia@demosagecrm.com

3 minute read time

Company

Eurolandia is an Active Customer within the territory US East.
The main account is managed by [Susan Maye \(212 340 1298\)](#), reporting to [Simon O'Neill \(086 234 1234\)](#).

Address

Eurolandia has [offices](#) in Boston.
Its business focus is Computers - Software and the main contact is [Kieran O'Toole \(Sales Manager\)](#).
We know [1 other contacts](#) at Eurolandia.

Communication

There are no completed communications on record.

Sales

We are currently working on [3 opportunities](#).

Cases

Eurolandia's Service Level Agreement is Undefined. Since 02/28/2023 there have been 5 issues logged. We are currently working on 4 cases.

- User Interface (5-2) with a SLA Severity of **Medium** and is assigned to [Kylie Ward \(212 340 1298\)](#).
- Error on log out (5-10031) with a SLA Severity of **Undefined** and is assigned to [Graham Rogers \(212 340 1298\)](#).
- Navigation problem (5-10033) with a SLA Severity of **Undefined** and is assigned to [Graham Rogers \(212 340 1298\)](#).
- Tabs not tabbing correctly (5-10034) with a SLA Severity of **Undefined** and is assigned to [Graham Rogers \(212 340 1298\)](#).

Relationships

- Owner of Gatecom Inc. - as of 7/2008

The narrative report is more memorable, persuasive, and engaging than data alone. It summarizes everything the reader needs to know about the company without having to look at the related records and convert the raw data into information.

The narrative report takes into account the security policies existing in Sage CRM, so that the generated information is tailored to the user who is accessing the **Narrative** tab. This prevents unauthorized access to sensitive data and makes the displayed information more relevant and useful for specific audiences.

As a system administrator, you can control what information is available to a user on the **Narrative** tab. To show or hide information, edit the user's security profile to grant or revoke the View right in the corresponding option, as shown in the table.

Area on Narrative tab	Controlled by View right in this security profile option
Company Address Relationships	Company Warning: Revoking the View right in this security profile option makes Companies inaccessible to the user.
Communication	Communication
Sales	Opportunity
Cases	Cases

For example, to hide information in the **Sales** area of the **Narrative** tab, make sure that the user does not have View rights on Opportunities in their security profile.

You can configure security profiles in  | **Administration** | **Users** | **Security** | **Security Profiles**.

Customize Sage CRM login screen

Feature ID: CRMS-1301

With this new feature, you can:

- Display and position your custom logo on the login screen.
- Change the background of the entire login screen, its top area (where the Sage logo is located), its middle area (where the login form is located), or its bottom area.

To perform these customizations, you can use the preconfigured .css and .js files supplied with Sage CRM.

1. On a Sage CRM server, locate the following files:

File name	Location
custom-logon.css Use this file to change the background color of the login screen and to position your custom logo.	<Sage CRM installation folder>\WWWRoot\Img\logon\css <div style="border: 1px solid black; padding: 5px;">Note: By default, Sage CRM is installed to %ProgramFiles(x86)%\Sage\CRM\CRM.</div>
ChangeLogonLogo.js Use this file to specify the name of the file that stores the custom logo you want to display on the login screen. You can store your custom logo in a .gif, .jpeg, .png, or .svg file. The file name can include the following characters only: A-Z, a-z, 0-9, underscore (_), full stop (.), and hyphen (-).	<Sage CRM installation folder>\WWWRoot\Img\logon\js

2. Edit the **custom-logon.css** and **ChangeLogonLogo.js** files to set the desired background color and specify the name of your custom logo file, if necessary. For details, see the annotations in the files.
3. Save your changes.

- If you want to display a custom logo, copy your custom logo file to <Sage CRM installation folder>\WWWRoot\Img\logon\gif.
- Copy the edited **custom-logon.css** and **ChangeLogonLogo.js** files to the following locations. Skip copying **ChangeLogonLogo.js** if you don't need to display a custom logo.

File name	Copy to
custom-logon.css	<Sage CRM installation folder>\WWWRoot\Themes\custom
ChangeLogonLogo.js	<Sage CRM installation folder>\WWWRoot\js\custom

Now you can open the Sage CRM login screen to view your customizations.

Note: When you upgrade Sage CRM, the Sage CRM Setup does not replace or modify the **custom-logon.css** and **ChangeLogonLogo.js** files in the locations you copied them to.

Example ChangeLogonLogo.js file

This is the contents of the **ChangeLogonLogo.js** file supplied with Sage CRM.

```

1  /*
2  @ 2023, The Sage Group plc or its licensors. All rights reserved.
3
4  Use this file to specify the name of the file that stores the custom logo you want to display
5  on the login screen.
6  To activate this file, copy it to:
7  <Sage CRM installation folder>\WWWRoot\js
8
9  You can store your custom logo in a .gif, .jpeg, .png, or .svg file.
10 The file name can include the following characters only:
11 A-Z, a-z, 0-9, underscore (_), full stop (.), and hyphen (-).
12 Replace MyLogo.png on line 20 with the actual name of your custom logo file.
13 Copy your custom logo file to:
14 <Sage CRM installation folder>\WWWRoot\Img\Logon\gif
15 */
16
17 $(function() {
18     let logo="LeftLogo";
19     $('#'+logo).children('img').attr("src",function(index, attr){
20         return attr.replace(logo+".png","MyLogo.png");
21     })
22 });

```

Example custom-logon.css file

This is the contents of the **custom-logon.css** file supplied with Sage CRM.

```
1  /*
2  © 2023, The Sage Group plc or its licensors. All rights reserved.
3
4  Use this file to customize the appearance of the Sage CRM login screen.
5  To activate this file, copy it to:
6  <Sage CRM installation folder>\WWWRoot\Themes\custom
7
8  On the login screen, the HTML elements controlled by this CSS are nested as follows:
9
10 <body>
11   <div id="LogonPageBody">
12     <div id="LogonForm">
13       <div id="HeaderImage">
14         </div>
15       </div>
16     </div>
17   </body>
18
19 As a result, HeaderImage overrides LogonForm, and LogonForm overrides LogonPageBody.
20 */
21
22
23 /* Positions your custom logo image on the login screen.*/
24 #LeftLogo {
25     position: relative;
26     top: 300px;
27     left: 100px;
28 }
29
30 /* Sets the background color of the entire login screen. */
31 #LogonPageBody {
32     background-color: green;
33 }
34
35 /* Sets the background color of the login screen area where the login form is located (the
36 middle of the screen). */
37 #LogonForm {
38     background-color: white;
39 }
40
41 /* Sets the background color of the login screen area where the Sage logo is located (the top
42 of the screen). */
43 #HeaderImages {
44     background-color: orange;
45 }
```

Allow file name extensions for upload

System administrators can configure an allowlist to restrict the file types that users can upload to Sage CRM. If a file name extension is missing from the allowlist, the upload of the file is blocked.


These restrictions apply when a user:

- Uses the **Add File** button or **Drop files here to attach them** area to upload files on the **Shared Documents** tab or attach files to a calendar task, email message, or communication.
- Selects the **Import Emails** button to file emails against a record in Sage CRM.

This new feature replaces the blocklist **File extension restrictions**, which has been **discontinued**.

Warning: During upgrading, the Sage CRM Setup does not transfer the file name extensions from the blocklist **File extension restrictions** to Sage CRM 2023 R1. You need to transfer these restrictions manually.

To allow file name extensions for upload:

1. Go to  | **Administration | Email and Documents | Documents & Reports Configuration**.
2. Configure the following options:
 - **Allowed file name extensions for upload.** Populate this option with the file name extensions that can be uploaded to Sage CRM. Omit full stop from the file name extensions. Use a comma as a separator.

The default value in this option is:

doc, docx, rtf, xls, xlsx, ppt, pptx, pdf, csv, xml, txt, jpg, jpeg, bmp, gif, png, svg, zip

If a file name extension in this option belongs to an executable file, you must also set **Allow executable files to be uploaded** to **Yes**. Sage CRM treats the following file types as executable:

com, cpl, dex, dll, exe, fon, mz, scr, sys, iec, ime, rs, tsp
 - **Allow executable files to be uploaded.** To allow the upload of executable files, set this option to **Yes** and add the file name extensions of executable files to **Allow file name extensions for upload**.

To detect an executable file, Sage CRM checks the file's header to determine its true type. This makes Sage CRM capable of detecting an executable file even if its file name extension has been changed.

Refreshed brand, enhanced accessibility

We have refreshed the Sage CRM user interface to make it consistent with the new visual identity of the Sage brand, enhance our customers' experiences, and improve the UI accessibility.

The UI now features:

- A new font
- A new set of recognizable and consistent icons
- A new color scheme improving the overall accessibility of the UI

Improved .NET documentation

We have moved the .NET API and SDK documentation from the [Developer Help](#) to the [Developer Portal](#). We have also added an up-to-date searchable [.NET API reference](#).

Support for new software

- **Microsoft SQL Server 2022.** You can configure Sage CRM to store data in a database hosted on Microsoft SQL Server 2022 Standard, Enterprise, Web, or Express.

Microsoft SQL Server 2022 Express is bundled with the Sage CRM 2023 R1 installation package, and you can install this SQL Server edition when installing Sage CRM.

Be aware that Microsoft SQL Server 2022 Express has a number of limitations. For details, see the *Sage CRM 2023 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).


Addressed issues



The following is a list of customer cases addressed in this release.

Issue ID	Area	Description	Status
CRMS-1050	Calendar Calendar list	When the Tasks tab of the calendar was configured to show overdue tasks whose status was In Progress , no tasks were shown even though they actually existed.	This issue is fixed.
CRMS-923	Calendar Calendar list	<p>A user who had sufficient rights on the Communication entity could not drag and drop an appointment in the calendar.</p> <p>This issue occurred in the following scenario:</p> <ol style="list-style-type: none">1. A system administrator created a new custom profile with the following settings:<ul style="list-style-type: none">• User's home territory: Communication: View/Ins• Assigned to: Communication: View/Edit/Del2. The system administrator assigned the custom profile to a user.3. The user created an appointment on the Work Week tab of the calendar and tried to drag and drop the appointment to a new date.	This issue is fixed.


Issue ID	Area	Description	Status
		<p>As a result, an empty Sage CRM window with an OK button appeared and the following error was observed on the Network tab in the Developer Tools (F12) of the web browser:</p> <p>"You do not have the required security permission <user name> - Communication."</p>	
CRMS-1264, CRMS-1310	Core product	<p>Sage CRM did not release the database connections it created.</p> <p>As a result, Sage CRM exceeded the maximum number of connections and the following error was written to the Sage CRM log file:</p> <p>"Could not open a connection to SQL Server."</p>	This issue is fixed.
CRMS-1152, CRMS-1157	Customization	<p>When a user attempted to open a custom entity record from the Recent list, an error occurred.</p> <p>This issue affected the custom entities that had:</p> <ul style="list-style-type: none"> • Companies and Persons. <p>and</p> <ul style="list-style-type: none"> • The following line of code in the ProjectSummary.asp file: <pre>var userid = CRM.GetContextInfo("User", "user_userid");</pre>	This issue is fixed.
CRMS-1131	Customization Quick Find Search	<p>The following issues occurred when the region in Windows was set to Hong Kong SAR and the language was set to Chinese (Traditional, Hong Kong SAR):</p> <ul style="list-style-type: none"> • Search Select Advanced fields that had restricted values failed to work, returning "Field value is 	This issue is fixed.

Issue ID	Area	Description	Status
		<p>not correct".</p> <ul style="list-style-type: none"> • Search and Quick Find didn't work. 	
CRMS-1222	Email	<p>When a system administrator enabled OAuth 2.0 in Email Management Server Options, the following error was written to the Sage CRM log file:</p> <p>"Exception connecting to Mail Server: SSL IOHandler is required for this setting."</p> <p>This issue was caused by the incorrect description of the SMTP server field in the System Administrator Help, which wrongly stated "If left blank, Email Management uses your POP server for outbound mails."</p>	Documentation updated to provide the correct description of the SMTP server field.
CRMS-1049	Exchange Integration	The synchronization of appointments between Sage CRM and Exchange Online (Office 365) permanently failed.	This issue is fixed.
CRMS-1109	Import contacts and emails	<p>When a user imported an email into a Company, the email's territory was erroneously set to None.</p> <p>The expected behavior in this case is that the Company's territory should be applied to the email.</p>	This issue is fixed.
CRMS-1154	Import contacts and emails	<p>When a user selected an email to import and then selected Import emails, the following error displayed:</p> <p>"The resource cannot be processed."</p> <p>This issue occurred only if the comm_channelid field was not set to 4.</p>	This issue is fixed.
CRMS-911, CRMS-460	Leads	When a user created a new Web Lead, the values of the lead_status and lead_stage fields were populated with the wrong values.	This issue is fixed.

Issue ID	Area	Description	Status
		<p>This issue occurred after a system administrator deleted an existing Lead workflow and created a new one.</p> <p>As a result, the lead_status and lead_stage of a new Web Lead contained the values of the deleted workflow.</p>	
CRMS-1096	Orders Customization	<p>When a user saved an Order, an "Invalid Date Time Error" displayed.</p> <p>This issue occurred when:</p> <ul style="list-style-type: none"> • The Order screen was linked to one or more custom entities. • Any entity in Sage CRM had a workflow enabled. 	This issue is fixed.
CRMS-1052	Reports	<p>When an Opportunity field contained Thai or Chinese characters, the reports using that field displayed number signs (#) instead of Thai or Chinese characters.</p>	This issue is fixed.
CRMS-1121	Reports	<p>A report that was configured to return data for the current week actually returned data across eight days.</p> <p>This issue occurred when:</p> <ul style="list-style-type: none"> • The report used a custom date field to return data and had the Relative option in search criteria configured to return data from the current week. • The above custom date field was added to an entity. 	This issue is fixed.
CRMS-518	User interface	<p>When a system administrator created or edited a relationship in  Administration Data Management Manage Relationship Types, the color names in the Display color list were gray and did not show the associated</p>	This issue is fixed.

Issue ID	Area	Description	Status
		<p>colors.</p> <p>The expected behavior is that each color name in the list should be displayed in the associated color: Red should be red, Orange should be orange and so on.</p>	
CRMS-1105	User interface	<p>The Field Type column in  Administration Customization <Entity name> showed the incorrect field type.</p> <p>This issue occurred when a system administrator did the following:</p> <ol style="list-style-type: none"> 1. Went to  Administration Customization Communication. 2. Located the Organizer field and took note of the corresponding value in the Field Type column. 3. Selected the Organizer field and took note of the value in the Entry type option. <p>As a result, the value in the Field Type column was different from the value in the Entry type option, whereas they should be the same.</p>	This issue is fixed.
CRMS-1252	Workflow	<p>When a user searched for and opened an Opportunity, the workflow actions were missing from the record, even though it had a workflow configured.</p>	This issue is fixed.

Discontinued features

- **Microsoft SQL Server 2019 Express removed from installation package.** We have replaced this SQL Server edition with Microsoft SQL Server 2022 Express. You can deploy SQL Server 2022 Express when installing a new Sage CRM instance. When you upgrade from a previous Sage CRM version that uses Microsoft SQL Server 2019 Express, the Sage CRM Setup does not upgrade SQL Server 2019 Express to SQL Server 2022 Express.
- **Microsoft SQL Server 2017.** This SQL Server version is no longer supported.
- **File extension restrictions are discontinued.** In this release, we have removed the blocklist of file name extensions (the **File extension restrictions** field) from  | **Administration | Email and Documents | Documents & Reports Configuration.** This blocklist is now replaced with a list of allowed file name extensions. For details, see [Allow file name extensions for upload](#).

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2023 R1 at the time of release.

Issue ID	Area	Description
CRMS-450 CRMS-595	Email	<p>When you right-click a highlighted misspelled word in the built-in email editor, the shortcut menu that opens does not provide a list of suggestions to correct the word.</p> <p>This issue occurs in the Google Chrome, Microsoft Edge, and Mozilla Firefox web browsers and is caused by a third-party component called CKEditor.</p> <p>WORKAROUND 1</p> <p>Hold down Ctrl and right-click the misspelled word to display a list of suggestions.</p> <p>WORKAROUND 2</p> <p>Install and use a spellchecker extension for your web browser such as LanguageTool.</p>
CRMS-430	RESTful API SData	<p>In Postman, when you use wildcard characters (%) in a GET request to return specific records, you receive unexpected results.</p> <p>For example, the following request returns all companies instead of just the companies whose name contains <i>Gate</i>:</p> <pre>GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'</pre> <p>This issue is caused by the way Postman processes certain characters. In the past, Postman provided a setting named Use next generation URL processing. By disabling this</p>

Issue ID	Area	Description
		<p>setting, you could make the wildcard characters work. However, this setting has been discontinued in the recent Postman releases.</p> <p>WORKAROUND 1</p> <p>Use URL encoding (%25) to encode the wildcard characters (%) in your request, for example:</p> <pre>GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%25Gate%25'</pre> <p>WORKAROUND 2</p> <p>Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.</p>
N/A	RESTful API	<p>When using the RESTful API, you may observe the following issues.</p> <p>Issue 1: Even though your request sent to the RESTful API uses the HTTPS protocol, the URLs of records returned by the API use HTTP.</p> <p>Issue 2: The base URL of the records returned by the API may be different from the one you used in your request. For example, the base URL in your request may contain the fully qualified domain name (FQDN) of the Sage CRM server but the base URL of the returned records has the local server name instead.</p> <p>REASON</p> <p>Issue 1: This is by design. The RESTful API always uses HTTP in the URLs of returned records.</p> <p>Issue 2: To form the URLs of returned records, the RESTful API uses the server name stored the <code>Parm_Value</code> column of the <code>Custom_SysParams</code> database table. However, this column can store several names for your Sage CRM server, for example, its local name and FQDN separated by a semicolon:</p> <pre>myserver;myservername.mydomain.com</pre> <p>The RESTful API always uses the first server name stored in this column.</p> <p>WORKAROUND FOR ISSUE 2</p>

Issue ID	Area	Description
		<p>Change the order of the server names stored in the <code>Parm_Value</code> column of the Sage CRM database, so that the FQDN of your server comes first.</p> <ol style="list-style-type: none"> 1. See the server names stored in the <code>Parm_Value</code> column: <pre>SELECT Parm_Value from Custom_SysParams where Parm_Name='ServerNames'</pre> 2. Back up the Sage CRM database. 3. Run a SQL query to change the order of the server names, for example: <pre>UPDATE Custom_SysParams SET Parm_Value = 'myservername.mydomain.com;myserver' WHERE Parm_Name = 'ServerNames'</pre>
CRMS-151	User interface	<p>When the Details field of an entity contains a long value (255+ characters) without spaces, line breaks, or dashes, the value isn't wrapped to fit in the field. For example, this issue occurs in the Lead_detail field. This limitation is by design and will not be fixed.</p> <p>WORKAROUND</p> <p>You can fit a long value in the field by displaying only the first 255 characters of the value. To do so, put the Details field in a List block. This doesn't change the actual value stored in the SQL Server database.</p>
CRMS-714	Email	<p>When you use the built-in email editor to insert an inline image into the email body by selecting Paste in a shortcut menu, a message appears stating that your web browser does not support this functionality and that you should use the Ctrl+V keys instead.</p> <p>But pressing the Ctrl+V keys also fails to insert the image.</p> <p>WORKAROUND</p> <p>To add an inline image:</p> <ol style="list-style-type: none"> 1. Below the email editor box, browse for and select a local image file. 2. Select Upload inline image.