Sage CRM 2021 R1
Release Notes

Updated: January 2021

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 2021 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 2021 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 2021 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
January 2021	eWare.dll	20.21.0.1
	Outlook plugin	20.21.0.1
	Document plugin	20.21.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2021 R1.

For more information about the software with which Sage CRM 2021 R1 can work and integrate, see the *2021 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.

New features and enhancements

Sage CRM 2021 R1 provides the following new features and enhancements:

- Support for OAuth 2.0
- Telephone numbers as links
- Inline customization of lists and grids
- Self-service password recovery
- Support for Microsoft Azure VMs
- Advanced Customization Wizard enhancements
- Documentation for additional RESTful API endpoints
- Ability to accept web leads from multiple IP addresses
- Support for new software

Support for OAuth 2.0

You can set up email configuration or Email Management in Sage CRM to use OAuth 2.0 for connecting to an Outlook or Gmail mailbox.

Note: If you have Microsoft Office 365 credentials cached on the Sage CRM server, you may encounter errors while completing the below steps. To avoid errors, we recommend that you either complete the steps in an incognito tab of your web browser or clear your web browser's cache.

- Enable OAuth 2.0 for a mailbox in Email Management
- Enable OAuth 2.0 in email configuration

Enable OAuth 2.0 for a mailbox in Email Management

1. Open a web browser on your Sage CRM server and enter the Sage CRM access URL replacing the server name or IP address with *localhost*.

   For example: *http://localhost/crm*

2. Log on to Sage CRM as a system administrator and go to **| Administration | Email and Documents | Email Management Server Options**.
3. Click the name of the Gmail or Outlook mailbox for which you want to enable OAuth 2.0, and then click **Change**.
4. In **Use OAuth 2.0 for**, select the mailbox type.
5. Obtain client ID and secret for your mailbox. For details, see:
   - Getting client ID and secret for Gmail
   - Getting client ID and secret for Outlook web app
6. Return to **Email Management Server Options** and paste the client ID and secret into **OAuth 2.0 client ID** and **OAuth 2.0 client secret**, respectively.
7. Click **Save**.

   When prompted, do the following:

- Sign in to the Microsoft Azure or Google account that owns the mailbox.

> **Note:** When signing in to the Google account, you may receive a warning that your app isn't verified. If so, click **Advanced** and select the option to go to your app.

- Allow the app you've created to access the Microsoft Azure or Google account.

Enable OAuth 2.0 in email configuration

1. Open a web browser on your Sage CRM server and enter the Sage CRM access URL replacing the server name or IP address with *localhost*.

   For example: *http://localhost/crm*

2. Log on to Sage CRM as a system administrator and go to **| Administration | Email and Documents | Email Configuration**.
3. Click **Change**.
4. In **Use OAuth 2.0 for**, select the mailbox type.
5. Obtain client ID and secret for your mailbox. For details, see:
   - Getting client ID and secret for Gmail
   - Getting client ID and secret for Outlook web app
6. Return to **Email Configuration** and paste the client ID and secret into **OAuth 2.0 client ID** and **OAuth 2.0 client secret**, respectively.
7. Click **Save**.

   When prompted, do the following:

   - Sign in to the Microsoft Azure or Google account that owns the mailbox.

   > **Note:** When signing in to the Google account, you may receive a warning that your app isn't verified. If so, click **Advanced** and select the option to go to your app.

   - Allow the app you've created to access the Microsoft Azure or Google account.

Getting client ID and secret for Gmail

1. Make sure that less secure app access is disabled in the Google account that owns the Gmail mailbox for which you are configuring OAuth 2.0.

   You can disable less secure app access in the security options of the Google account.

For more information, see Less secure apps & your Google Account in Google Account Help.

2. Sign in to Google Cloud Platform, go to APIs & Services, and create a new project.
3. Go to **OAuth consent screen**, select **External**, and click **Create** to create an app.
4. On the **OAuth consent screen** step, fill in the required fields, then save and continue.
5. On the **Scopes** step, add the **openid** scope, then save and continue to complete the remaining steps.
6. Go to Credentials and obtain client ID and secret:
   a. Click **Create credentials** to select **OAuth client ID**.
   b. In **Application type**, select **Web application**.
   c. Provide an informative name for your application.
   d. In **Authorized redirect URIs**, add the following URL, all lowercase:

      http://localhost/<install name>/custompages/oauth/callback.html

      Where *<install name>* is the name of your Sage CRM installation.

      Use *https://* if your installation is configured to use HTTPS.
   e. Click **Create**.
   f. Copy the client ID and secret that display and store them in a file.

Use the obtained client ID and secret to enable OAuth 2.0 for the Gmail mailbox in Sage CRM.

Getting client ID and secret for Outlook web app

1. Sign in to Outlook web app.

   Use the account that owns the mailbox for which you are configuring OAuth 2.0.
   The account must have administrator privileges in Outlook.
   a. In Outlook settings, go to **POP and IMAP** and make sure that **Let devices and apps use POP** is set to **Yes**.
   b. If necessary, save your changes.
2. Sign in to the Azure Active Directory admin center. Use the account that owns the Outlook mailbox.
3. Go to App registrations.
4. Register a new application:
   a. Click **New registration**:
   b. Enter a descriptive name for the application.

c. Under **Supported account types**, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)**.

d. Under **Redirect URI (optional)**, select **Web** and enter the following URI, all lowercase:

http://localhost/<install name>/custompages/oauth/callback.html

Where *<install name>* is the name of your Sage CRM installation.

Use *https://* if your installation is configured to use HTTPS.

e. Click **Register**.

f. Copy the application (client) ID that displays and store it in a file.

5. Obtain a secret for your application:

   a. Go to **Certificates & secrets**.

   b. Click **New client secret**, type a description and select an expiry option.

   c. Click **Add**.

   d. Copy the client secret that displays and store it in a file.

6. Go to **API permissions** and add the following Microsoft Graph delegated permissions for your app:

   - IMAP.AccessAsUser.All
   - POP.AccessAsUser.All
   - SMTP.Send

Use the obtained client ID and secret to enable OAuth 2.0 for the Outlook mailbox in Sage CRM.

Telephone numbers as links

Starting from version 2021 R1, all telephone numbers in Sage CRM are formatted as telephone links, for example:

```
<a href="tel:1-234-567-8900">1-234-567-8900</a>
```

You can tap a telephone link on a phone-capable device to call a phone number. On a desktop computer, when you click a telephone link, you are normally prompted to select an application (for example, Skype) in which you want to open the link.

Note: The behavior of telephone links may differ in different browsers or operating systems.

Inline customization of lists and grids

Now system administrators can use inline customization to change lists and grids. Inline customization enables you to see how a list or grid looks like before and after your changes. When using this customization method, you can also find out the name of a list or grid.

Lists are displayed when you select a tab within the context of company, case, lead, opportunity, solution, or person.

Grids are used to display the results of a search for a person, lead, case, opportunity, and so on. Grids are also displayed on the **Company Quick Look** tab.

To change a list or grid using inline customization:

1. Go to **| Administration | Customization | Primary Entities** or **Secondary Entities | <any entity> | Lists**.

   You can select any primary or secondary entity. Inline customization will be enabled for all entities.

2. Select **Inline Customization**.
3. Open the list or grid you want to customize.
4. In the top left corner of the list or grid, click **Customize List**.

   In the window that opens, you can view the name of the list or grid being customized in parenthesis in the top left corner.

5. Make your changes and click **Save**.
6. Go to **| Administration | Customization | Primary Entities** or **Secondary Entities | <any entity> | Lists** and clear **Inline Customization** to return to normal mode.

Self-service password recovery

This feature enables users to reset their Sage CRM password without contacting the system administrator.

By default, self-service password recovery is disabled. When the system administrator enables this feature, a **Forgot My Password** link is added to the Sage CRM logon screen.

To reset their forgotten password, a user must enter their user name on the logon screen and then click the **Forgot My Password** link. As a result, Sage CRM sends an automated email containing a password reset link to the email address associated with the user. The user can then reset their password by clicking the password reset link in the email.

- Enable self-service password recovery
- Edit password recovery email templates
- Reset a password

Enable self-service password recovery

To enable self-service password recovery for all users, a system administrator must do the following:

1. Configure Sage CRM to use HTTPS: on the Sage CRM computer, open Internet Information Server (IIS) Manager, create an HTTPS binding for the Sage CRM site, and manually add a server certificate.

   This step is required to display the **Forgot My Password** link on the Sage CRM logon screen. When a user accesses the logon screen via HTTP, the **Forgot My Password** link isn't displayed for security reasons.

2. Configure Sage CRM to send emails:

   a. Go to **| Administration | Email and Documents | Email Configuration**.

   b. Click **Change**.

   c. Populate the following fields:

      - **Outgoing mail server (SMTP)**
      - **SMTP port**
      - **SMTP User Name**

- **SMTP Password**

  For details, see Sage CRM help.

d. Click **Save**.

Edit password recovery email templates

If necessary, the system administrator can edit the default email templates used to send password recovery emails.

Go to **| Administration | Email and Documents | Email Templates** and edit the following templates:

- English: **Forgot Password (EN)**
- Spanish: **Forgot Password (ES)**
- French: **Forgot Password (FR)**
- German: **Forgot Password (DE)**

Reset a password

If you have forgotten your Sage CRM, you can reset it using self-service password recovery, provided that this feature is enabled by the system administrator:

1. Open the Sage CRM logon screen.
2. Enter your user name in the **User Name** box.
3. Click the **Forgot My Password** link.

As a result, Sage CRM sends an automated email containing a password reset link to the email address associated with your user name.

Click the password reset link in the email to set up a new password for your Sage CRM account.

> **Note:** Your password must begin with a digit or letter. You cannot use a special character as the first character in your password.

Support for Microsoft Azure VMs

A system administrator can install Sage CRM 2021 R1 on a Microsoft Azure virtual machine.

Minimum supported Microsoft Azure virtual machine configuration:

Size	vCore	Memory: GiB	Temp storage (SSD) GiB	Max temp storage throughput: IOPS/Read MBps/Write MBps
Standard_ A4_v2	4	8	40	4000/80/40

Advanced Customization Wizard enhancements

A new version of the Advanced Customization Wizard is available for download.

The new version is compatible with Sage CRM versions 2021 R1, 2020 R2, and 2020 R1 and provides the following enhancements:

- **A new icon for custom entities**. Custom entities now have the following default icon: . The icon is provided in various dimensions in the following files:
  - CompLink.gif
  - EntityIcon.gif
  - PersLink.gif
  - RelatedEntityIcon.gif
  - SmallEntityIcon.gif
  - SummaryEntityIcon.gif
- **A new warning**. When the wizard is run, it displays a warning stating that irreversible changes will be made to the Sage CRM database structure.
- **Consistent top content layout**. The top content area of screens created with the wizard now follows the same layout as the standard Sage CRM entity screens: each of the **Name**, **Company**, and **Person** fields is located on a new line.

Documentation for additional RESTful API endpoints

We have updated the *Developer Help* to provide information about additional RESTful API endpoints. For details, see SData endpoints.

We have also added examples showing how to use these endpoints into the Sage CRM Postman collection. For details, see Postman collection in the *Developer Help*.

Ability to accept web leads from multiple IP addresses

Feature ID: CRMS-50

When customizing leads, you can configure Sage CRM to accept web leads from multiple trusted IP addresses:

1. Log on to Sage CRM as a system administrator.
2. Go to **| Administration | Customization | Lead | Web to Lead**.
3. Click **Change**.
4. In **Only accept web leads from the following IP address**, enter the IP addresses from which you want to accept leads. Use a semicolon (;) as a separator.
5. Click **Save**.

   As a result, web leads originating from any other IP addresses will not be accepted.

Support for new software

- **Microsoft SQL Server 2019 CU 8**. You can host Sage CRM database on SQL Server 2019 with Cumulative Update 8 or earlier installed.
- **Microsoft SQL Server 2017 CU 22**. You can host Sage CRM database on SQL Server 2017 with Cumulative Update 22 or earlier installed.

Discontinued features

- **Computer telephony integration (CTI)**. This functionality based on ActiveX has been removed from Sage CRM 2021 R1 and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2021 R1 completely removes CTI. This feature was only available to customers using Internet Explorer 11.
- **Sage CRM mobile apps**. Usage of the Sage-developed iPhone and Android apps for Sage CRM has been declining in recent years in favour of partner-developed apps. Following a recent product review, we have decided to end development of the Sage CRM iPhone and Android apps. Development efforts will focus on improving the customer experience of the core product features, and improving the APIs to enhance the integration capabilities of Sage CRM.

  The Sage CRM iPhone and Android Apps will be removed from their respective marketplaces during the second half of 2021. After this point, customers who already have the apps may continue to use them, but the apps will no longer be supported and may no longer work after the operating system of the phone is updated.

  Please note that the development and support of the Sage CRM Mobile Theme continues.

Known issues and limitations

This section lists issues and limitations known to exist in Sage CRM 2021 R1 at the time of release.

Area	Description
Lite and Classic Outlook plugins	The Outlook plugin installer (.msi) files cannot be used to deploy the plugins via Group Policy. This limitation is by design and will not be fixed. WORKAROUND Deploy the plugins manually.
User interface	After upgrading Sage CRM, old themes such as Classic are available in the Sage CRM UI. WORKAROUND We recommend that you use the Contemporary theme. Any other themes are not supported.

Addressed issues

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

Issue ID	Area	Description	Status
CRMS-192	Calendar	When a user created a quick task or appointment, one of the following issues occurred: • The created item used the system time zone instead of the time zone set in the user preferences. • The time set in the created item was wrong.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-309	Calendar	When a user created an appointment with a custom status, the Meeting Planner didn't reflect the appointment times. For example, the issue occurred when you did the following: 1. Logged on to Sage CRM as a system administrator. 2. In **| Administration | Customization | Communication**, added a new selection for the **Caption** field, for example, *Confirm*. 3. Created an appointment for 12pm - 5pm. Set the appointment status to **Confirm**. 4. Created another appointment for 12pm - 2pm. Set the appointment status to **Pending**. As a result, the Meeting Planner didn't highlight the overlap time of the two appointments (12pm - 2pm) in red.	This issue is fixed.
CRMS-247	Calendar	The **Timeline** view in the Team CRM calendar didn't show appointments for users who had the team selected in **Team CRM for** assigned as their display team.	This issue is fixed.
CRMS-245 CRMS-295	Calendar, Client-side API	The Client-side API returned the wrong start time for an appointment when a user did the following: 1. In **Date/Time Preferences**, set **Use AM/PM** to **No**. 2. Created a new appointment and set **Date/Time** to **12:00**. As a result, the `crm.fields("comm_datetime").value()` method in the Client-side API returned the wrong **Date/Time** field value (**00:00**).	This issue is fixed.

<table>
<tr><th>Issue ID</th><th>Area</th><th>Description</th><th>Status</th></tr>
<tr><td>CRMS-257</td><td>Cases</td><td>Custom fields linked to other fields were not autopopulated in some scenarios.

For example, this issue occurred when a system administrator did the following:

1. Created the following text fields on the Case entity:
• case_title
• case_department

2. Added these fields to the Case Detail Screen (CaseDetailBox).

3. Amended the case_primarypersonid field to add the following value to the Linked Field option:
pers_title=case_title, pers_department=case_department

4. Created a new case:
a. In the Company field, selected a company.
b. In the Person field, selected a person who has the fields pers_title and pers_department populated.

As a result, the case_title and case_ department fields of the case were not autopopulated with the values set for the selected person.</td><td>This issue is fixed.</td></tr>
</table>

Issue ID	Area	Description	Status
CRMS-269	Companies, People	An error occurred when updating the value of a custom field whose **Column Name** property value contained a number after the underscore, for example: *comp_425sometext* This issue showed up when Sage CRM was integrated with another system, for example, Sage 300.	This issue is fixed. A new check has been added to the **Column Name** property to ensure that a number or special character cannot be entered after the underscore.
CRMS-314	Core product	When a user attached a file to an opportunity and then tried to view the file, the following issues occurred: • The paperclip icon was missing from the attachment on the **Communications** tab of the opportinity. • The attachment wasn't accessible to the user.	This issue is fixed.
CRMS-133	Core product	A currency field wasn't hidden from the **CompanySearchBox** screen when a system administrator did the following: 1. In **| Administration | Customization | Company**, added a currency field to the **CompanySearchBox** screen of the Company entity. 2. Added the following code to the **CreateScript** option of the currency field: `hidden=true;` 3. Saved their changes.	This issue is fixed.
CRMS-205	Core product	A misleading warning stating that Sage CRM wasn't registered displayed in a properly registered version of Sage CRM. This issue occurred when the Sage CRM registration server was unavailable.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-340	Customization	An "Invalid DateTime value" error occurred when a user created a new custom entity record. For example, this happened when a system administrator configured Sage CRM as follows: 1. Created a custom entity (Contract) with the following settings: • Has Communications • Workflow • Add to Find • Owned by Opportunities • Has Library • Has Workflow Progress 2. Added a Date field to the Contract entity. 3. Created another custom entity (ContractProducts). 4. Added an advanced search select field to the ContractProducts entity to select a contract by ID. 5. Added the field created in step 4 to the new entry screen for the ContractProducts entity. 6. Amended the New rule in the Contract entity workflow to set the Date field to **Display for amendment**. 7. Enabled the rule, saved and activated the workflow. With this setup, when a user opened an opportunity, created a new contract, and then used the green plus button to create a new contract product, an "Invalid DateTime value" error occurred.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-101	Customization	When a system administrator edited an escalation rule cloned from another rule, the changes were unexpectedly applied to the original rule. For example, this issue occurred when a system administrator did the following: 1. Created a new custom field on the Company entity. 2. Created and configured a new escalation rule. 3. Configured the rule to send an email when the field created in step 1 was set to a specific value. 4. Cloned the escalation rule created in step 2. 5. Edited the new escalation rule and saved their changes. As a result, the escalation rule created in step 2 also contained the edits made in step 5.	This issue is fixed.
CRMS-211	Customization	After upgrading Sage CRM, a custom entity record field that was configured to be populated by a workflow rule was no longer populated.	This issue is fixed.
CRMS-325	Customization, .NET SDK	A custom search implemented using the SageCRMNet.dll file supplied in the Sage CRM .NET SDK returned incorrect results.	This issue is fixed.
CRMS-331	Dashboard	When a system administrator created a new dashboard template in the Spanish-language UI of Sage CRM by selecting the option **Indicadores clave de rendimiento de ventas para directivos**, an error occurred.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-402	Documentation	Instructions on how to configure OAuth 2.0 for Exchange Online provided in the System Administrator Help became outdated because of the change in the Azure Portal user interface. As a result, it wasn't possible to register Sage CRM as a new app in Azure Active Directory.	This issue is fixed.
CRMS-346	Documentation	Documentation provided instructions for using the Mapping Component, although the component was no longer supported.	This issue is fixed. Documentation has been updated to remove the mentions of the Mapping Component.
CRMS-348	Documentation	Documentation erroneously provided steps to deploy Outlook plugins using .msi files and Group Policy, although this method was no longer supported.	This issue is fixed. Documentation has been updated to remove the outdated steps.
CRMS-377	Email	When a system administrator created a new email template in **| Administration | Email and Documents| Email Templates**, it was unexpectedly populated with the content of the default email template set in user preferences.	This issue is fixed.
CRMS-248	Email	An error occurred when a system administrator enabled auto replies by uncommenting lines 204 and 213 in the %ProgramFiles(x86)%\Sage\CRM**support.js** file.	This issue is fixed.
CRMS-415	Email, Mailchimp	When a user clicked **Marketing | Duplicate Emails** in the main menu, an error occurred.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-365	Exchange Integration	When a system administrator enabled Exchange Integration and configured it to use OAuth 2.0, Exchange Integration failed to work and a SQL Server-related error was written to the CRM.log file.	This issue is fixed.
CRMS-354	Exchange Integration	The Sage CRM user interface didn't make it clear that to configure OAuth 2.0 for Exchange Integration, a system administrator had to open a web browser on the Sage CRM server and enter *localhost* in the address bar.	This issue is fixed. A new check has been added to the OAuth 2.0 configuration screen to display a warning if the Sage CRM access URL doesn't contain *localhost*.
CRMS-310	Leads	When workflow was disabled for leads and the built-in Lead Workflow was deleted, it was not possible to create a new lead using the Web to Lead feature.	This issue is fixed.
CRMS-346	Leads	An error occurred when opening a lead after upgrading Sage CRM. This issue occurred only when the Mapping Component was installed.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-330	Mobile theme	When a user created a new communication in the Mobile Theme, Sage CRM forcefully logged out the user and displayed the logon screen. This problem occurred if a system administrator customized Sage CRM as follows: 1. In **| Administration | Advanced Customization | System Menus**, from **Devices**, selected **Device: Mobile Device (iPhone, Blackberry, Nokia etc) with color screen**. 2. In the list, clicked **new**. 3. Changed the order of tabs so that **Communication** came first. 4. Saved the changes.	This issue is fixed.
CRMS-327	Mobile theme	Scroll bars were missing when viewing or editing an email on a device running iOS.	This issue is fixed.
CRMS-356	Quick find, Search	In some situations, an advanced search select field that's supposed to show addresses for a specific company showed all addresses stored in Sage CRM. For example, this issue occurred when a system administrator did the following: 1. Created an advanced search select field on the Opportunity entity to search for addresses within the current company. 2. Added the field to a workflow rule and activated the workflow.	This issue is fixed.
CRMS-275	Quick find, Search	The width of search results in Quick Find was too narrow. As a result, some records were truncated.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-305	Quick find, Search	An "Invalid Selection code" error occurred when searching for custom entity records by the current user.	This issue is fixed.
CRMS-193	Quotes, Orders	A follow-up task wasn't displayed on the **Communications** tab of the associated opportunity. This issue occurred when a user did the following: 1. Created a quote that was linked to an opportunity and company. 2. Created a task for the quote. Made sure that the task was displayed on the **Communications** tab of the related opportunity and company. 3. Created a follow-up task for the task created in step 2. 4. Checked the **Communications** tab of the related opportunity. The follow-up task was missing from the tab.	This issue is fixed.
CRMS-333	Reports	When a system administrator created a new report by cloning an existing report, the **Default** value was missing from the **Saved Search** field of the new report.	This issue is fixed.
CRMS-218	RESTful API	Creating a lead through the `POST /Lead` RESTful API endpoint failed when the **Lead_PersonEmail** parameter value exceeded 12 characters.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-430	RESTful API, SData	In Postman, when a system admin or developer used wildcard characters (%) in a GET request to return specific records, they received unexpected results. For example, the following request returned all companies instead of companies whose name contained *Gate*: `GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'`	This issue is fixed. The Developer Help has been updated with instructions on how to configure Postman to avoid this issue.
CRMS-296	Translation	An issue in the German version of Sage CRM: incorrect translation (Litauen) was added for the country code of Lithuania (LT).	This issue is fixed.
CRMS-357	Users, Groups	ISSUE 1 When creating a user, an info manager was able to assign system admin rights to that user. However, the user was actually created with info manager rights, because an info manager cannot create users with system admin rights. ISSUE 2 In some situations, when an info manager changed the password of a system admin, the system admin was unexpectedly converted to info manager.	These issues are fixed.

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 Sage CRM, make sure you have *Microsoft OLE DB Driver 18 for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

Click here to download Microsoft OLE DB Driver 18 for SQL Server

If you don't have this driver installed, the Sage CRM Setup will not be able to connect to the SQL Server.

Upgrade path

You can use the Sage CRM 2021 R1 installation package to upgrade from versions 2020 R2, 2020 R1, 2019 R2, 2019 R1, 2018 R3, and 2018 R2.

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 2021 R1 and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2021 R1 completely removes CTI.

Post-upgrade tasks

- 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. Click **Disable** and then click **Continue**.
  d. Click **Change**.
  e. In the **CRM Password** text box, re-enter the password.
  f. Click **Save**.
  g. Click **Enable**.

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