



Sage CRM 2021 R2 Release Notes

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Contents

- Overview** 5
- Release date and files included 6
- Documentation and help 7

- New features and enhancements** 8
- Web leads: configure individual return URL for each web form 9
- Mail merge: append quote or order ID to Word or PDF file name 10
- Select template when sending quote or order 10
- Customize CSS of current theme 11
- Change appearance of pipeline chart 12
- View more log files from user interface 12
- Use demo workflow for company 14
- View information about web browser in the Activity database table 15
- Changes to fields and tabs 15
 - Case-related changes 16
 - Company-related changes 16
 - Opportunity-related changes 17
 - Order-related changes 17
 - Quote-related changes 17
 - Person-related changes 18
 - Changes to field captions 18
- New cursor indicating when application is busy 20
- New dashboard template and reports 20
- Support for new software 21

Discontinued features	22
Known issues and limitations	23
Addressed issues	25
Installing and upgrading	33
Installation prerequisites	33
Upgrade path	33
Post-upgrade tasks	34

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 R2 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 R2 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 R2, 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 2021	eWare.dll	20.21.0.2
	Outlook plugin	20.21.0.1
	Document plugin	20.21.0.2

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2021 R2.

For more information about the software with which Sage CRM 2021 R2 can work and integrate, see the *2021 R2 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 R2 provides the following new features and enhancements:

- [Web leads: configure individual return URL for each web form](#)
- [Mail merge: append quote or order ID to Word or PDF file name](#)
- [Select template when sending quote or order](#)
- [Customize CSS of current theme](#)
- [Change appearance of pipeline chart](#)
- [View more log files from user interface](#)
- [Use demo workflow for company](#)
- [View information about web browser in the Activity database table](#)
- [Changes to fields and tabs](#)
- [New cursor indicating when application is busy](#)
- [New dashboard template and reports](#)
- [Support for new software](#)

Web leads: configure individual return URL for each web form

When a user submits a web lead, Sage CRM can redirect the user to the URL of a web page. This URL is called *return URL*.

Note: For more information on how to enable and configure web leads, see [Web leads](#) in the *System Administrator Help*.

This Sage CRM version enables system administrators to configure an individual return URL for each web form for submitting web leads. For example, if you have web forms in different languages, you can redirect users to a web page in their language after they submit a lead.

To do so, override the default redirect URL in the HTML code for each web form.

1. In the HTML code implementing your web form, locate the following element:

```
<input type="hidden" name="WebLeadReturnURL" id="WebLeadReturnURL" value="">
```

If this element is missing (for example, you used a previous Sage CRM version to generate the HTML code), manually add the following code between the `</TABLE>` and `</FORM>` tags:

```
</TABLE>
```

```
<input type=hidden name=_HIDDENlead_source value="Web"><input type="submit" value="Save and Submit"><input type="hidden" name="RuleID" id="RuleID" value=""><input type="hidden" name="WebLeadReturnURL" id="WebLeadReturnURL" value="">
```

```
</FORM>
```

2. In the `value` attribute of the element whose ID is `WebLeadReturnURL`, enter the URL to which you want to redirect users after they submit a lead. Prefix the URL with `http://` or `https://`.

Example:

```
<input type="hidden" name="WebLeadReturnURL" id="WebLeadReturnURL" value="http://www.mywebsite.com">
```

Note: When the `value` attribute in this element is empty, the form uses the default return URL defined in the Web to Lead configuration settings.


3. Save your changes.

Mail merge: append quote or order ID to Word or PDF file name

A system administrator can configure Sage CRM to automatically append a quote or order identifier to the name of a Word or PDF file generated by a mail merge. As a result, when a user completes a mail merge for a quote or order, the generated file name will have the following format:

<template file name>-<quote or order ID>.<file name extension>

To configure this behavior:

1. Go to  | **Administration | Data Management | Products**.
2. Select the **Product Configuration** tab.
3. Select **Change** and set the following options to **Yes**:
 - **Use Quote Format for Merge document name**
 - **Use Order Format for Merge document name**
4. Select **Save**.

Consider the following limitations:

- Sage CRM automatically removes the following special characters from quote and order identifiers before appending them to file names:

`/ \ : * ? " < > | . & '`

- This feature works only when a user selects a single quote or order. With multiple quotes or orders selected, Sage CRM appends a randomly generated number.

Select template when sending quote or order

Now when a user selects the **Send Quote** or **Send Order** button, they are prompted to select an existing document template to generate the quote or order from. The generated quote or order is then attached to the new email message in the next step.

Customize CSS of current theme

You can change the look of the current Sage CRM theme by applying CSS customizations. To do so, you can either use an existing empty .css file supplied with this release (**RedefinedStyles.css**) or copy your own .css files to a Sage CRM server. If necessary, you can roll back customizations by editing or deleting your .css files.

Note that these customizations do not apply to reports and interactive dashboard layout and gadgets.

1. On a Sage CRM server, open the following location:

<Sage CRM installation folder>\WWWRoot\Themes\custom

where **<Sage CRM installation folder>** is the folder you specified when installing Sage CRM. By default, this is **%ProgramFiles(x86)%\Sage\CRM\CRM**.

2. Add your CSS customizations to the **RedefinedStyles.css** file in the **custom** folder. Alternatively, copy your custom .css files to that folder.

You may need to use the `!important` rule to apply your CSS customizations.

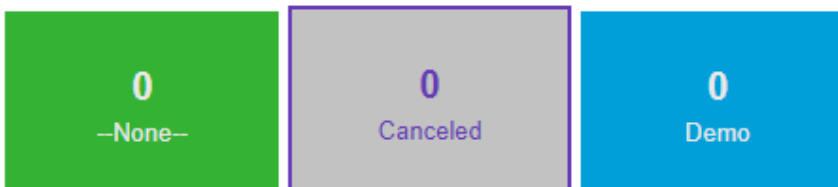
Note: Sage CRM applies your .css files in the alphabetical order of their names, from A (first) to Z (last). As a result, if you customize a CSS element in your first file, it can be potentially overwritten by customizations in the next files.

3. Open IIS Manager and recycle the **CRM App Pool** to apply your customizations.
4. Clear browser cache on each client computer to display CSS customizations correctly.


CSS customizatn example

```
.active2 {  
background: #c2c2c2 !important;  
}
```

Changes the color of the currently selected pipeline tile to gray:

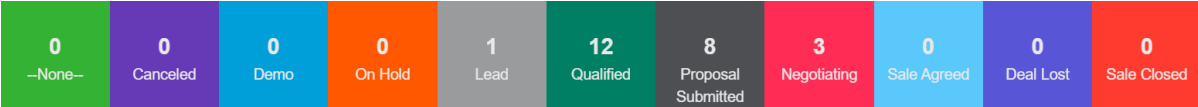


Change appearance of pipeline chart

A new option **Pipeline chart style** has been added to  | Administration | System | System Behavior. System administrators can use this option to select how the pipeline chart looks.

The available values are:

- **Rectangle** (default):




- **Cylinder**:



View more log files from user interface

This enhancement allows a system administrator to open and view more log files from the Sage CRM user interface, including logs for Tomcat, SData 1.0 and 2.0, Spring Framework, and SQL Driver.

To view Sage CRM logs:

1. Go to  | Administration | System | Logging.
2. From **Select log files**, choose the type of log files you want to view.
3. In the **View Log** column, click the icon to open the log file.

You can view the following log files:

Log file type in the UI	Corresponding log file name
.Net Log	<timestamp>dotnet.log
Active Directory Import Log	<timestamp>ActiveDirectoryImportLog.log
Archived User Activity Log	<timestamp>ArchivedUserActivity.log

Log file type in the UI	Corresponding log file name
Component Install Log	<timestamp>componentinstall.log
E-mail Manager Log	<timestamp>mailmanager.log
Hibernate Framework Log	<timestamp>hibernate.log
Integration Log	<timestamp>integration.log
Mailchimp Integration Log	<timestamp>mailchimp.log
Outlook Log	<timestamp>ewareoutlooksync.log
Quick Find Instance Log	<timestamp>keywordSearch.log
SData 2.0 Log	<timestamp>sdata2.log
SData 1.0 Log	<timestamp>sdata.log
Spring Framework Log	<timestamp>spring.log
Spring Framework Social Connections Log	<timestamp>social.log
SQL Driver Log	<timestamp>sql.log
SQL Log	<timestamp>ewaresql.log
Sync Engine Log	<timestamp>syncenginesynch.log
Synchronisation Log	<timestamp>synchlog.log
System Log	<timestamp>ewaresystem.log
Territory Errors Log	<timestamp>ewareterritoryerrors.log
Tomcat CRM Log	<timestamp>crm.log
Tomcat Global Functions Log	<timestamp>gcrm.log
Tomcat Main Log	<timestamp>core.log
Tomcat Sync Functions Log	<timestamp>scrm.log


Use demo workflow for company

Sage CRM 2021 R2 provides a new demo workflow named *Sage Company Workflow*. To check out this workflow, go to  | **Administration | Advanced Customization | Workflow**.

The workflow illustrates how to set up rules and actions for the Company entity, namely:

- Create a note to record changes to a comp_slaid, comp_type, comp_status, or comp_primaryuserid value.
- Allow changes to a comp_slaid value only after they have been agreed with the customer and recorded in a communication.
- Automatically create a task.
- Use a JavaScript condition to determine when workflow actions become available.
- Use a JavaScript condition to link actions performed on a task to the workflow.
- Use an Execute SQL Statement rule action to insert data into the Notes database table.

By default, the Sage Company Workflow is disabled. To enable the workflow:

1. Go to  | **Administration | Advanced Customization | Workflow & Escalation Workflow**.
2. Select **Change**.
3. Set **Workflow for companies** to **Yes**.
4. Select **Save**.

When the workflow is enabled, the following workflow actions are available for each company in Sage CRM:

- **Set Account Manager**
- **Set Type**
- **Set Status**

View information about web browser in the Activity database table

Feature ID: CRMS-209


The `acty_method` column of the `Activity` table in the Sage CRM database now stores extended information about the web browser with which a user accessed Sage CRM and their operating system, for example:

```
Web - Browser: nav / Version: 0, Mozilla/5.0 (Windows NT 10.0; Win64; x64)
AppleWebKit/537.36
```

To view the contents of the `Activity` table, run `Select * from Activity.`

System administrators can use the `Activity` table to understand system usage and troubleshoot issues.

Changes to fields and tabs

We have removed unused and added more frequently used fields and tabs to the default screen objects in the user interface. If necessary, a system administrator can add the removed fields back in  | **Administration** | **Customization** | **<Entity>**. We have also changed the default captions of some fields.

Consider the following:

- Changes to fields apply only when you perform a new Sage CRM 2021 R2 install.
- Changes to tabs apply only when you perform a new Sage CRM 2021 R2 install with English demo data.
- Changes listed in this section do not apply if you upgrade to Sage CRM 2021 R2 from a previous version.

Case-related changes

Removed fields	From objects
<ul style="list-style-type: none">• Cases : Found in (case_foundver)• Cases : Area (case_productarea)• Cases : Fix in (case_targetver)• Cases : Found in (case_productid)	<ul style="list-style-type: none">• Screen: CaseDetailBox• Screen: CaseSearchBox• List: Case List• List: Case Grid

We have also moved the **Notes** tab under the **More** option.

Company-related changes

Removed fields	From object
<ul style="list-style-type: none">• Company : Employees (comp_employees)• Company : Revenue (comp_revenue)• Company : This record was sent to (comp_integratedsystems)• Company : Opt out of E-marketing communications (comp_optout)	<ul style="list-style-type: none">• Screen: CompanyBoxLong

We have also moved the following Company tabs under the **More** option:

- **Key Attributes**
- **Marketing**
- **Notes**
- **Self Service**

Opportunity-related changes

Added fields	To objects
<ul style="list-style-type: none">• Opportunity : Forecast (oppo_forecast)• Opportunity : Certainty% (oppo_certainty)• Opportunity : Close By (oppo_targetclose)	<ul style="list-style-type: none">• List: Opportunity Grid• List: Opportunity List

Removed field	From object
Opportunity : Type (oppo_type)	List: Opportunity Grid

We have also moved the **Notes** tab under the **More** option.

Order-related changes

Added fields	To objects
Company : Company Name (comp_name)	List: Orders Grid
Orders : Created Date (orde_createddate)	<ul style="list-style-type: none">• List: Orders Grid• List: Orders List• List: Orders List Box

We have also moved the **Notes** tab under the **More** option.

Quote-related changes

We have moved the **Notes** tab under the **More** option.

Person-related changes

Changed the order of fields

From:

- Person : Last Name (pers_lastname)
- Person : First Name (pers_firstname)

To:

- Person : First Name (pers_firstname)
- Person : Last Name (pers_lastname)

On objects

- Screen: PersonBoxLong
- Screen: PersonBoxShort
- List: Person Grid

We have also moved the following Person tabs under the **More** option:

- **Marketing**
- **Notes**
- **Self Service**
- **Consent**

Changes to field captions

We have replaced *Fax* with *Alternative* in field captions for the following fields:

Caption family	Caption family type	Caption code	Old field caption	New field caption
ColNames	Tags	Comp_FaxAreaCode	Fax Area Code	Alternative Area Code
ColNames	Tags	Comp_FaxCountryCode	Fax Country Code	Alternative Country Code
ColNames	Tags	Comp_FaxFullNumber	Fax	Alternative
ColNames	Tags	Comp_FaxNumber	Fax Number	Alternative Number
ColNames	Tags	lead_personfaxareacode	Fax Area Code	Alternative Area Code

Caption family	Caption family type	Caption code	Old field caption	New field caption
ColNames	Tags	lead_personfaxcountrycode	Fax Country Code	Alternative Country Code
ColNames	Tags	lead_personfaxnumber	Fax Number	Alternative Number
ColNames	Tags	pers_emailfaxnumber	Email Fax Number	Email Alternative Number
ColNames	Tags	Pers_FaxAreaCode	Fax Area Code	Alternative Area Code
ColNames	Tags	Pers_FaxCountryCode	Fax Country Code	Alternative Country Code
ColNames	Tags	Pers_FaxFullNumber	Fax Full Number	Alternative Full Number
ColNames	Tags	Pers_FaxNumber	Fax Number	Alternative Number
ColNames	Tags	phon_areacodefax	Area Code Fax	Area Code Alternative
ColNames	Tags	phon_countrycodefax	Country Code Fax	Country Code Alternative
ColNames	Tags	phon_numberfax	Number Fax	Number Alternative
ColNames	Tags	User_Fax	Fax	Alternative
ColNames	Tags	Visi_FaxCountryCode	Fax Code	Alternative Code
ColNames	Tags	Visi_FaxNumber	Fax	Alternative
Link_AccPhon	Links	Fax	Fax	Alternative
Link_CompPhon	Links	Fax	Fax 1	Alternative 1
Link_PersPhon	Links	Fax	Fax 1	Alternative 1
Link_PersPhon_Comp	Links	Fax	Fax	Alternative

New cursor indicating when application is busy

Sage CRM now displays a wait cursor (a spinner) to let the user know when the application is busy and they need to wait. The spinner displays when Sage CRM is loading a page, processing data, saving changes and so on.

New dashboard template and reports

We have added the following new list reports:

- All Active Quotes
- All Orders

To access these reports, go to **Reports | Sales**.

We use these reports in the gadgets of a new dashboard template named *Quote Dashboard*. To access the template, on the **Dashboard** tab, select **Templates | Dashboard Templates**. You can find the Quote Dashboard under **Team Dashboards**.

By default, the Quote Dashboard is not assigned to any user, but you can assign it to users as necessary. For more information, see [Creating a dashboard from a template](#) in the *User Help*.

Support for new software

We have added support for the following SQL Server versions:

- Microsoft SQL Server 2019 with Cumulative Update 10 and earlier
- Microsoft SQL Server 2017 with Cumulative Update 24 and earlier

Sage CRM 2021 R2 now supports Android 11.

Discontinued features

- **Support for Android 9 Pie.** Sage CRM no longer supports this version of the Android operating system.

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2021 R2 at the time of release.

Issue ID	Area	Description
N/A	Lite and Classic Outlook plugins	<p>You cannot use the Outlook plugin installer (.msi) files to deploy the plugins via Group Policy. This limitation is by design and will not be fixed.</p> <p>WORKAROUND</p> <p>Deploy the plugins manually.</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 Gate:</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 setting, you could make wildcard characters work. However, this setting has been discontinued in the recent Postman releases.</p> <p>WORKAROUND</p> <p>Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.</p>

Issue ID	Area	Description
N/A	User interface	<p>After upgrading Sage CRM, old themes such as Classic are available in the Sage CRM user interface.</p> <p>WORKAROUND</p> <p>We recommend that you use the Contemporary theme. No other themes are not supported.</p>
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>

Addressed issues

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

Issue ID	Area	Description	Status
CRMS-322	Calendar	With Exchange Integration enabled, an appointment created in Microsoft Outlook by a non-administrator user was shown in Sage CRM as created by System Administrator.	This issue is fixed.
CRMS-437	Calendar	<p>When a user switched from the Month view in the calendar to the Day, Week, or Work Week view, all appointments that displayed fine in the Month view disappeared.</p> <p>Then, when a user switched back to the Month view, the appointments didn't appear.</p>	This issue is fixed.
CRMS-617	Companies People	<p>When a user searched for a company using a search select advanced button (🔍), Sage CRM stopped responding.</p> <p>This issue occurred only when one or more company names registered with Sage CRM contained double quotes ("").</p>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-555	Customization	<p data-bbox="656 222 1203 327">An "Invalid DateTime value" error occurred when a user created a new custom entity record.</p> <p data-bbox="656 363 1203 468">For example, this happened when a system administrator configured Sage CRM as follows:</p> <ol data-bbox="672 499 1203 1640" style="list-style-type: none"> <li data-bbox="672 499 1203 940">1. Created a custom entity (Contract) with the following settings: <ul data-bbox="748 600 1094 940" style="list-style-type: none"> <li data-bbox="748 600 1057 632">• Has Communications <li data-bbox="748 659 902 690">• Workflow <li data-bbox="748 718 932 749">• Add to Find <li data-bbox="748 777 1094 808">• Owned by Opportunities <li data-bbox="748 835 932 867">• Has Library <li data-bbox="748 894 1086 926">• Has Workflow Progress <li data-bbox="672 953 1154 1026">2. Added a Date field to the Contract entity. <li data-bbox="672 1054 1105 1127">3. Created another custom entity (ContractProducts). <li data-bbox="672 1155 1198 1260">4. Added a search select advanced field to the ContractProducts entity to select a contract by ID. <li data-bbox="672 1287 1162 1392">5. Added the field created in step 4 to the new entry screen for the ContractProducts entity. <li data-bbox="672 1419 1198 1535">6. Amended the New rule in the Contract entity workflow to set the Date field to Display for amendment. <li data-bbox="672 1562 1203 1635">7. Enabled the rule, saved and activated the workflow. <p data-bbox="656 1682 1203 1860">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.</p>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-343	Customization	<p>A new custom entity record didn't have a workflow displayed for it when you did the following:</p> <ol style="list-style-type: none"> Created a new custom entity with the following settings: <ul style="list-style-type: none"> Workflow Owned by Companies Owned by People Configured a workflow for the entity. Created a new custom entity record in the company context. 	This issue is fixed.
CRMS-443	Customization	In some scenarios it was possible to leave a required multiselect field blank.	This issue is fixed.
CRMS-439	Customization	<p>A user who had a custom entity record assigned couldn't view the record when:</p> <ul style="list-style-type: none"> The entity had the Add to My CRM parameter selected. The user had the following user rights set to View for the custom entity: <ul style="list-style-type: none"> Assigned to Created by User's home territory 	This issue is fixed.
CRMS-538	Document drop	<p>When a user used drag and drop to add a file to a record, and then used this method to add another file with the same name to the same record, the second file overwrote the first one.</p> <p>The expected behavior in this scenario is that Sage CRM should automatically rename the second file to avoid overwriting the first one.</p>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-669	Documentation	<p>A 404 error occurred when you tried to download User Help, System Administrator Help, or Troubleshooting Help as a .pdf file on the Sage CRM Help Center (help.sagecrm.com).</p> <p>This issue affected help for Sage CRM 2019 R2, 2019 R1, 2018 R3, 2018 R2, and 2018 R1.</p>	This issue is fixed.
CRMS-662	Email	When a company and one or more persons were associated with the same email address, Sage CRM created communications for the company only.	<p>By design.</p> <p>Documentation updated to mention this behavior.</p>
CRMS-293	Email	<p>In some scenarios, fields on the Document Search Screen (LibrarySearchBox) were populated with incorrect details.</p> <p>For example, this issue occurred when:</p> <ul style="list-style-type: none"> • The Document Search Screen contained only these two fields: Library : Case (libr_caseid) Library : Company (libr_companyid) and • You performed these steps in the context of a case: <ul style="list-style-type: none"> a. Created a new email. b. In the new email, under To add a global document or a document from the cases Documents list, selected the down arrow and then selected Find. <p>As a result, fields in the screen were populated with the details of the wrong company.</p>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-558	Exchange Integration	With Exchange Integration configured and full logging enabled, Sage CRM didn't create any user logs in the following folder: %ProgramFiles(x86)%\Sage\CRM\ <InstallName>\Logs\Exchange Integration\User	This issue is fixed.
CRMS-579	Interactive dashboard	When a user clicked the Help hyperlink in the interactive dashboard, a 404 error occurred.	This issue is fixed.
CRMS-458	Logging	Name of the following Sage CRM log file was wrong: log4j.xml_old	By design. This is the old log file that is no longer used. For more information about the new location of the log file, see Enabling detailed logging for interactive dashboards .
CRMS-480	Mail merge	When a user performed a mail merge, an error occurred. This issue showed up only when the path specified in the Physical root directory for mail merged documents option in Documents & Reports Configuration didn't have a backslash (\) appended to it.	Documentation updated to mention that the path must have a trailing backslash.

Issue ID	Area	Description	Status
CRMS-587	Mail Merge	<p>A "Can't reach this page" error occurred when a user edited a Word document containing a merged custom entity record.</p> <p>For example, this happened when a user:</p> <ol style="list-style-type: none"> 1. Created a custom entity with the following settings: <ul style="list-style-type: none"> • Owned by Cases • Has Communications • Has Library 2. Added a custom text field to the custom entity. 3. Amended an existing Word template to include the custom text field as a merge field. 4. Created a new custom entity record and selected Merge to Word. 5. Edited the created Word document and saved the changes. 	This issue is fixed.
CRMS-488	Opportunities	<p>When a user attached a document to a quote or order, the document didn't appear on the Documents tab of the related opportunity.</p>	This issue is fixed.
CRMS-573	Outlook plugin	<p>When using the Lite or Classic Outlook plugin to file an email with an attached file, you encountered the following issue:</p> <p>Only the email was added to the communication, but the attachment was missing.</p> <p>This issue occurred when the attachment size was 40+ KB.</p>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-201	Quick find Search	<p>It was not possible to look for a person's mobile phone number using Keyword Search.</p> <p>For example, this issue occurred when a system administrator:</p> <ul style="list-style-type: none"> Added the Pers_MobileFullNumber field to the Person Search Screen (PersonSearchBox) and Person Grid. <p>and</p> <ul style="list-style-type: none"> Configured Keyword Search to use vSearchListPerson. 	This issue is fixed.
CRMS-472	Quick find Search	<p>Selecting a custom entity for indexing in <My profile> Administration System Quick Find caused Quick Find log files to grow extremely large in size.</p>	This issue is fixed.
CRMS-557	Quotes Orders	<p>When a user created a Quote record, cloned it, and then merged the original and cloned record to Word, they would notice some inconsistencies in the created Word documents.</p> <p>For example, a blank cell in the original Word document was unexpectedly populated with 0.00 in the document generated for the cloned Quote record.</p>	This issue is fixed.
CRMS-409	Reports	<p>An issue in the French version of Sage CRM: A report configured to include data for the current week actually showed data for the previous week.</p>	This issue is fixed.
CRMS-417	SData	<p>When a request sent to the REST API contained a statement with a single quote between double quotes, an error occurred.</p> <p>Example of a request that caused an error:</p> <pre>GET /Company?where=comp_name eq "Peter O'Tool"</pre>	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-457	Users Groups	<p>Sage CRM didn't display an error message when a system administrator set the User Inactivity Timeout option to 0 in <My profile> Administration Users User Configuration.</p> <p>For the said option, Sage CRM only supports values that are greater than zero.</p>	This issue is fixed.
CRMS-384	Users Groups	A user could not create a new forecast because quarters were missing for fiscal years.	This issue is fixed.
CRMS-491	Web server	Out of the box, Apache Tomcat supplied with Sage CRM generated log files in debug mode. As a result, the size of log files was extremely large and consumed a lot of space on a Sage CRM server.	This issue is fixed.
CRMS-611	Web Services	An error occurred when a system administrator worked with a record through the Web Services API and one of the field values of the record contained this combination of characters: %&	This issue is fixed.
CRMS-105	Web Services	In some situations a user was unexpectedly logged out of Sage CRM Web Services before the inactivity timeout expired.	This issue is 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 R2 installation package to upgrade from versions 2021 R1, 2020 R2, 2020 R1, 2019 R2, 2019 R1, and 2018 R3.

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 R2 and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2021 R2 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.