Sage CRM 2022 R2
Release Notes

Updated: August 2022

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 2022 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 2022 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 2022 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	eWare.dll version
August 2022	20.22.0.2

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2022 R2.

For more information about the software with which Sage CRM 2022 R2 can work and integrate, see the *2022 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 2022 R2 provides the following new features and enhancements:

- **Set maximum password length**
- **Import contacts and email messages from Exchange Online**
- **RESTful API: Upload file to specified folder**
- **Support for new software**

Set maximum password length

Password policies in **| Administration | Users | Security | Password Policies** now provide a new option **Maximum length of password**. It lets system administrators configure the maximum password length for the users the policy applies to. The value in this option cannot exceed 200 and must be equal to or greater than the one set in the **Minimum length of password** option.

The value in the **Maximum length of password** option takes effect only when a user to whom the password policy applies tries to change their password.

Import contacts and email messages from Exchange Online

System administrators can configure Sage CRM to allow users to connect to their Exchange Online account and import data into Sage CRM.

With this feature, Sage CRM users can:

- Import email messages from their connected Exchange Online account and file them against a Company, Person, or Opportunity record in Sage CRM.
- Import contacts from their connected Exchange Online account and store them in Sage CRM as Person or Lead records. If the company associated with the contact exists in Sage CRM, the contact is imported as a Person record and associated with that company. Otherwise, the contact is imported as a Lead record.

This feature replaces the Classic and Lite Outlook Integration in new installations of Sage CRM.

When you upgrade from a Sage CRM version where the Classic or Lite Outlook Integration is enabled, enabling the import of contacts and email messages does not disable the Classic or Lite Outlook Integration.

In this section:

- **Steps to enable import of contacts and email messages**
- **Getting OAuth 2.0 client ID and secret for Azure Active Directory**
- **Importing contacts**
- **Importing email messages**

Steps to enable import of contacts and email messages

Step 1: As a system administrator, enter OAuth 2.0 client ID and secret in Sage CRM

1. Create and configure an application in Azure Active Directory to obtain OAuth 2.0 client ID and secret. For details, see **Getting OAuth 2.0 client ID and secret for Azure Active Directory**.
2. In Sage CRM, go to **| Administration | Email and Documents | OAuth 2.0 Settings for Importing Contacts and Emails**, select **Change**, and enter the obtained OAuth 2.0 client ID and secret.

Now users can connect to their Exchange Online account and start importing data into Sage CRM.

Step 2: As a user, connect to your Exchange Online account

All users who want to import data from Exchange Online to Sage CRM must complete this step.

1. In Sage CRM, go to **| Preferences**.
2. Do one of the following:
   - If you are connecting to your email account for the first time, select **Connect to Email Account**. This button is available only if your system administrator has set up the import of contacts and email messages from Exchange Online.
   - If you are already connected to an email account and would like to switch to a different account, select **Switch Email Account**.
3. When prompted, enter the user name and password for the Exchange Online account from which to import data.

To import data, follow the steps in these sections:

- **Importing contacts**
- **Importing email messages**

Getting OAuth 2.0 client ID and secret for Azure Active Directory

As a system administrator, complete these steps to obtain OAuth 2.0 client ID and secret and enter them in Sage CRM to enable users to connect to their Exchange Online accounts and import contacts and email messages.

1. Sign in to the **Azure Active Directory admin center** as an administrator.
2. Go to **App registrations**.
3. 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 URIs:
      - *http://localhost/<install name>/custompages/oauth/callback.html*
      - *https://<server name>/<install name>/custompages/oauth/callback.html*

      If your Sage CRM server is accessible on the internet, also add:
      - *https://<server FQDN>/<install name>/custompages/oauth/callback.html*

      In these URIs:
      - *<install name>* is the name of your Sage CRM installation. It must be all lowercase.
      - *<server name>* is the name of the Sage CRM server. It must be all lowercase.
      - *<server FQDN>* is the fully qualified domain name of the Sage CRM server. It must be all lowercase.
   e. Click **Register**.
   f. Copy the application (client) ID and store it in a file.
4. 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. In the **Value** column, copy the client secret and store it in a file.

5. Go to **API permissions** and add the following Microsoft Graph delegated permissions:
   - Contacts.Read
   - Contacts.Read.Shared
   - IMAP.AccessAsUser.All
   - Mail.Read
   - Mail.Read.Shared
   - Mail.ReadWrite
   - Mail.ReadWrite.Shared
   - POP.AccessAsUser.All
   - SMTP.Send
   - User.Read

Enter the obtained OAuth 2.0 client ID and secret in Sage CRM. See **Steps to enable import of contacts and email messages**.

Importing contacts

Before completing these steps, make sure that you have connected to your Exchange Online account as described in **Steps to enable import of contacts and email messages**.

1. In Sage CRM, go to the **Contacts** tab.
2. Select **Import Contacts**.

   A list of contacts available in your connected Exchange Online account opens.
3. In the **Import** column, select the Import button ( ) beside the contacts you want to import. This imports the contacts into Sage CRM.

The imported contacts become one of the following in Sage CRM:

- Lead records, if the company associated with the contact does not exist in Sage CRM or not recognized during import.
- Person records, if the company associated with the contact exists in Sage CRM and is recognized during import.

Importing email messages

Before completing these steps, make sure that you have connected to your Exchange Online account as described in **Steps to enable import of contacts and email messages**.

1. In Sage CRM, open the Company, Person, or Opportunity record into which you want to import email messages from your Exchange Online account.
2. Select **Import Emails**.
3. Under **Email Folder**, select the folder that stores the messages you want to import.

   This opens a list of messages residing in the selected folder of your connected Exchange Online account.
4. Select the checkboxes beside the messages you want to import.
5. Configure the following:
   - **Communication Status**. Select the status you want to assign to the email messages in Sage CRM.
   - **Communication Action**. Select the action you want to assign to the email messages in Sage CRM.
   - **Use Email Date**. Select this check box if you want to mark the email messages being imported with their original sent date (if the messages are outgoing) or received date (if the messages are incoming). When you clear this checkbox, the messages are marked with the current date.
6. Select **Import Emails**.

As a result, the emails are imported into Sage CRM together with their attachments and filed as communications against the selected Company, Person, or Opportunity record. You can view them on the **Communications** tab of the record.

RESTful API: Upload file to specified folder

We have added a `hiddenUserFolder` parameter to the **Upload a file to a folder** endpoint.

You can use this optional parameter to specify the name of a subfolder in **<Sage CRM installation folder>\Library** to upload the specified file to. If the subfolder does not exist, the endpoint creates it.

Example value of hiddenUserFolder

```
MyFolder
```

When you omit the `hiddenUserFolder` parameter, the file is uploaded to **<Sage CRM installation folder>\Library\TEMP\<SID>**, where <SID> is the session ID you use to authenticate your call. By default, Sage CRM is installed to **%ProgramFiles(x86)%\Sage\CRM\CRM**.

To try out the `hiddenUserFolder` parameter, use a **Postman collection** provided for Sage CRM 2022 R2:

1. Import the .json files from the **Postman collection** into Postman.
2. Configure Postman as described in the Sage CRM 2022 R2 REST API reference.
3. In the imported collection, expand the **RESTful API endpoints (formerly SData)** folder.
4. Run the first request to obtain a session ID.
5. Run the **Upload a file to a folder** request.

Support for new software

- **Microsoft SQL Server 2019 Web Edition**. You can configure Sage CRM to store data in a database hosed on Microsoft SQL Server 2019 Web Edition. We have also updated the *Hardware and Software Requirements* to clarify which editions we support for each Microsoft SQL Server version.

Discontinued features

- **Lite and Classic Outlook Plugins**. We no longer support these plugins and they are not available in new Sage CRM 2022 R2 installations. Use **Import contacts and email messages from Exchange Online** instead. If you had the Lite or Classic Outlook Plugin enabled in a previous version of Sage CRM, upgrading to Sage CRM 2022 R2 does not disable the plugin. Please note that Sage Support will not address any issues related to the plugins.

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2022 R2 at the time of release.

Issue ID	Area	Description
CRMS-450 CRMS-595	Email	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. This issue occurs in the Google Chrome, Microsoft Edge, and Mozilla Firebox web browsers and is caused by a third-party component called CKEditor. WORKAROUND 1 Hold down Ctrl and right-click the misspelled word to display a list of suggestions. WORKAROUND 2 Install and use a spellchecker extension for your web browser such as **LanguageTool**.
CRMS-430	RESTful API SData	In Postman, when you use wildcard characters (`%`) in a GET request to return specific records, you receive unexpected results. For example, the following request returns all companies instead of just the companies whose name contains *Gate*: `GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'` 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 the wildcard characters work. However, this setting has been discontinued in the recent

Issue ID	Area	Description
		Postman releases. WORKAROUND 1 Use URL encoding (`%25`) to encode the wildcard characters (`%`) in your request, for example: `GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%25Gate%25'` WORKAROUND 2 Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.
N/A	RESTful API	When using the RESTful API, you may observe the following issues. 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. 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. REASON Issue 1: This is by design. The RESTful API always uses HTTP in the URLs of returned records. Issue 2: To form the URLs of returned records, the RESTful API uses the server name stored the `Parm_Value` column of the `Custom_SysParams` 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: `myserver;myservername.mydomain.com` The RESTful API always uses the first server name stored in this column. WORKAROUND FOR ISSUE 2 Change the order of the server names stored in the `Parm_Value` column of the Sage CRM database, so that the FQDN of

Issue ID	Area	Description

		your server comes first.
		1. See the server names stored in the `Parm_Value` column:
		`SELECT Parm_Value from Custom_SysParams where Parm_Name='ServerNames'`
		2. Back up the Sage CRM database.
		3. Run a SQL query to change the order of the server names, for example:
		`UPDATE Custom_SysParams SET Parm_Value = 'myservername.mydomain.com;myserver' WHERE Parm_Name = 'ServerNames'`

N/A	User interface	After upgrading Sage CRM, old themes such as Classic are available in the Sage CRM user interface. WORKAROUND We recommend that you use the Contemporary theme. No other themes are supported.
CRMS-151	User interface	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. WORKAROUND 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.
CRMS-714	Email	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. But pressing the Ctrl+V keys also fails to insert the image. WORKAROUND To add an inline image:

Issue ID	Area	Description
		1. Below the email editor box, browse for and select a local image file. 2. Select **Upload inline image**.

Addressed issues

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

Issue ID	Area	Description	Status
CRMS-857	Calendar	This issue occurred when Sage CRM had a root territory and one or more subterritories configured. When a system administrator created a new user that had all rights on the root territory, and then the user created an appointment for a company in a subterritory, the appointment wasn't shown to the user in the calendar.	This issue is fixed.
CRMS-1040	Component management	Sage CRM logged out a user unexpectedly. This issue occurred in the following scenario: 1. A system administrator used the Component Manager to create a new custom entity that had cases. 2. A user created a new custom entity record, and then created a new case for the record. After this step, Sage CRM logged out the user.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-982	Customization	When a user edited a record on a custom screen and then saved the changes, the Sage CRM logon screen opened.	This issue is fixed.
CRMS-928	• Customization • Document drop	Sage CRM logged out a user after they attached a document to a custom entity record or updated an existing document attached to it.	This issue is fixed.
CRMS-752	• Customization • Quotes and orders	When a user selected a non-default status for a Quote record and saved the changes, the status was unexpectedly reset back to the default one. This issue occurred when the selected status used a custom translation and code.	This issue is fixed.
CRMS-969	Document drop	When a user attached a file to a Company record on the **Documents** tab, the **Regarding** field showed the wrong description. This issue occurred when a user performed the following steps: 1. Opened an Opportunity record. 2. Opened Keyword Search, searched for a Company record, and opened it. 3. Opened the **Documents** tab of the **Company** record and attached a file.	This issue is fixed.
CRMS-929	Documentation	The *Hardware and Software Requirements* document did not cover scenarios where the database server used by Sage CRM required more hardware resources.	The *Hardware requirements* section in the *Hardware and Software Requirements* document has been updated.

Issue ID	Area	Description	Status
CRMS-822	Email	When a user sent an email using an email template with an attachment added, the email failed to be sent. This issue occurred only when the attachment name contained a diacritic (â, ê, î, and so on).	This issue is fixed.
CRMS-912	Exchange Integration	When a system administrator enabled a Sage CRM user mailbox for synchronization with Exchange on the **User Mailbox Management** tab in **| Administration | Email and Documents | Exchange Server Integration | Connection Management**, the synchronization operation failed with an error stating that the Sync Engine failed to connect to an Exchange mailbox. This issue occurred if the system administrator did not have an Exchange Online mailbox configured for their administrator account in Office 365.	The **Configuring OAuth 2.0 for Exchange Online (Office 365)** topic in the *System Administrator Help* has been updated to mention that your Office 365 administrator account must have a mailbox configured in Exchange Online.
CRMS-751	Exchange Integration	When a user edited an appointment or task synchronized from Sage CRM to Exchange Online, the time of the appointment or task unexpectedly changed. This issue occurred in the following example scenario: 1. A system administrator configured bidirectional synchronization for appointments and tasks between Sage CRM and Exchange Online.	This issue is fixed.

Issue ID	Area	Description	Status
		2. A user created an appointment in Sage CRM and set the appointment time to 4:00 PM – 5:00 PM of the current date. 3. When the appointment was synchronized to Exchange Online, the user edited the appointment in Microsoft Outlook without changing the appointment time. 4. When the user saved the modified appointment, its time unexpectedly changed to 3:00 PM – 4:00 PM.	
CRMS-460	Leads	With the Web to lead feature enabled and a lead workflow configured, when a user created a new lead, Sage CRM assigned the wrong values to the **lead_status** and **lead_stage** fields of the lead.	This issue is fixed.
CRMS-878	• Leads • Opportunities	An error "No company or person was selected. Cannot continue with conversion." occurred when a user tried to convert a lead to an opportunity. This issue was observed only if the website address specified for the related company exceeded 40 characters.	This issue is fixed.
CRMS-874	Opportunities	When a system administrator changed **Order by Desc** to **Yes** in **| Administration | Customization | Secondary entities: Opportunity Progress | Lists | OpportunityProgressList**, this change was not applied to the last column on the **Tracking** tab of an Opportunity record.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-896	Reports	When a user edited a report on opportunities to sort records by the **Opportunity: Company** field, this change did not have any effect.	By design. This issue occurs because the **Opportunity: Company** field contains unique IDs of companies, not company names. To sort records by company, use the **Company: Company Name** field.
CRMS-879	Reports	Sage CRM failed to generate a report in the Microsoft Excel format when the currency rate specified in **| Administration | Data Management | Currency** exceeded 999.	This issue is fixed.
CRMS-926	Security management	Apache Tomcat 9.0.33 supplied with Sage CRM contained the following security vulnerabilities: • **CVE-2021-30639** • **CVE-2021-41079**	Apache Tomcat supplied with Sage CRM has been updated to version 9.0.62, where these vulnerabilities are fixed.
CRMS-786	Self service	ISSUE 1 When a user opened a Case record, a 500 HTTP error occurred. This issue showed up when a system administrator configured the Case entity as follows: 1. Opened **| Administration | Cusomization | Cases**. 2. On the **Screens** tab, selected the **ssCaseEntry** screen.	This issue is fixed.

Issue ID	Area	Description	Status
		3. Selectd the **case_ referenceid** field. 4. In the **CreateScript** box, added `Required=true`. ISSUE 2 When a user tried to modify and save a Case record, a 500 HTTP error occurred. This issue showed up when a system administrator configured the Case entity as follows: 1. Opened **<My profile> | Administration | Cusomization | Cases**. 2. On the **TableScripts** tab, selected **New**. 3. In the **Table-level script** box, entered a script. 4. Saved the changes.	
CRMS-804	Territories	The **Document Territory** field of an attached file was reset to a blank value when a user performed the following steps: 1. Opened a Company record. 2. Added a file on the **Documents** tab. 3. Set the **Document Territory** field of the attached file to **Default**. 4. Saved the changes. 5. Opened the attached file on the **Documents** tab and observed the value of the **Document Territory** field.	This issue is fixed.

Issue ID	Area	Description	Status
CRMS-979 CRMS-850	Translation	When the Opportunities pipeline was enabled in a non-English version of Sage CRM, the legend below the pipeline and some of the user interface text were still displayed in English.	This issue is fixed.
CRMS-875	User interface	When a user entered a telephone number in Sage CRM without specifying a country code, and then clicked that telephone number to dial it, the telephone number was dialled with a country code.	This issue is fixed by adding the following fields to **| Administration | System | System Behavior**: • **Use country code** • **Use area code** Use these fields to specify whether to include country or area codes when dialling telephone numbers from within Sage CRM.
CRMS-881	User interface	When a user created a quote, the company summary information was incorrect or missing from the quote.	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 or upgrading Sage CRM, make sure that:

- Your environment meets the *Sage CRM 2022 R2 Hardware and Software Requirements* published on the **Sage CRM Help Center**.

- You have *Microsoft OLE DB Driver 18 for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

  Download Microsoft OLE DB Driver 18 for SQL Server

  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 2022 R2 installation package to upgrade from versions 2022 R1, 2021 R2, 2021 R1, 2020 R2, 2020 R1, 2019 R2, and 2019 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 2022 R2 and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2022 R2 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 2022 R2 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 2022 R2 System Administrator Help* published on the **Sage CRM Help Center**.