Sage CRM 2020 R1
Release Notes

Updated: January 2020

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 2020 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 2020 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 2020 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 2020	eWare.dll	2020.0.1
	Outlook plugin	2020.0.1
	Document plugin	2020.0.1
	CTI plugin	2020.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2020 R1.

For more information about the software with which Sage CRM 2020 R1 can work and integrate, see the *2020 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 2020 R1 provides new features and enhancements in the following areas:

- MailChimp
- Documents
- Document drop
- Outlook plugins
- Email templates
- Support for new software

MailChimp

Detection and prevention of duplicate email addresses (742-171455-ENH). MailChimp integration has been enhanced to allow users more easily prevent and fix duplicate email addresses in groups sent to MailChimp. MailChimp identifies records in a group by email address. If a group sent to MailChimp contains two or more records with the same email address, the group gets rejected.

This enhancement includes the following:

- Automatic detection of duplicate email addresses
- A new screen displaying records with the same email address
- A new MailChimp notification

Automatic detection of duplicate email addresses

To ensure that a Person, Company, or Lead record being added to the system has a unique email address, system administrators can now use a new **Detect duplicate emails** option.

With the detection of duplicate email addresses enabled, when a user is adding or editing a Person, Company, or Lead record and tries to assign an email address that is already assigned to another record in the system, an error occurs.

System administrators can access the **Detect duplicate emails** option in **<My profile> | Administration | System | System Behavior**.

A new screen displaying records with the same email address

A new screen called **Duplicate Emails** lists all Company, Person, and Lead records that have the same email address. It helps users to identify and amend records that potentially can cause errors if sent to MailChimp in the same group.

To access the new screen, on the main menu, click **Marketing | Duplicate Emails**.

> **Note:** This screen is available only when MailChimp Integration is enabled. To access this screen, you must have rights to use MailChimp campaigns.

A new MailChimp notification

A new notification provides information about invalid and duplicate email addresses in a group sent to MailChimp, making it easier to troubleshoot issues. Users can click the number of invalid or duplicate emails in the notification to open the corresponding error group and correct the invalid email addresses or amend the duplicate email addresses to make them unique.

Documents

Support for nested mail merge. Users can create document templates to perform a *nested mail merge*. This is where a parent entity record has the details of one or more child entity records embedded into it. For example, you can create a template that generates an Order document with embedded Order Item records.

Out of the box, Sage CRM supports nested mail merge for the following entities:

Parent entity	Child entity
Quote	Quote Item
Order	Order Item

Sage CRM is supplied with two example templates for nested mail merge:

- **Panoply Sales Quote.html**. Uses Quote as the parent entity and Quote Items as the child (nested) entity.
- **Panoply Sales Order.html**. Uses Order as the parent entity and Order Items as the child (nested) entity.

You can use these templates to create your own. For more information , see *Sage 2020 R1 User Help*.

Document drop

Document Drop is now available in all browsers. We have refactored the Document Drop feature to remove the ActiveX dependency and make the feature JavaScript-based. Now Document Drop is available in all web browsers supported by Sage CRM. Users can also drag and drop emails from Outlook in all supported web browsers.

As a result, the following options have been removed because they are no longer needed:

- **Use ActiveX Document Drop on Internet Explorer** in **<My profile> | Administration | Email and Documents | Documents & Reports Configuration.**
- **Allow ActiveX Document Drop** in **User Preferences**.

Outlook plugins

Improved installation of Outlook plugins. We have removed ActiveX as a dependency for the installation of the Lite and Classic Outlook plugins. This enables Sage CRM users to download and install the Outlook plugins in any web browser supported by Sage CRM. The Outlook plugins are now deployed using Windows Installer (.msi) files. You may want to configure Sage CRM to automatically sign the .msi files to ensure they are trusted by the client computers in your environment. This requires a digital certificate suitable for code signing.

Consider the following limitations:

- The new Outlook plugin installer (.msi) files cannot be used to deploy the plugins via Group Policy.
- After upgrading Sage CRM to version 2020 R1, you must manually upgrade the Outlook plugins on each client computer where they are installed.

Signing Outlook plugin installer (.msi) files

Out of the box, the Classic Outlook Plugin and Lite Outlook Plugin installer (.msi) files are signed with a digital certificate issued by Sage Technologies Limited.

When a user requests a download of an Outlook plugin .msi file, Sage CRM modifies the .msi file by applying custom installation parameters to it. This invalidates the digital signature that has been applied to the .msi file out of the box.

As a result, when a user runs the downloaded .msi file, Windows may display a warning reading that the digital signature of the file is invalid. To avoid this, you can configure Sage CRM to automatically sign the .msi files with a valid certificate after custom installation parameters have been applied.

Your certificate must:

- Be installed in the **Local Computer\Personal** certificate store on the Sage CRM server.
- Have a corresponding private key.
- Be enabled for the code signing purpose.
- Be trusted on the client computers on which users will run the signed .msi files.
  To ensure this, install the certificate in the **Trusted Root Certification Authorities** store on each client computer.

> **Note:** Sage CRM is supplied with a demo certificate. For more information, see *Using a demo certificate* below.

To automatically sign the .msi files, complete these steps:

1. Enable digital signing of the .msi files:
   a. Go to **<My profile> | Administration | Users | User Configuration** and click **Change**.
   b. Set **Digitally sign plugin installer** to **Yes**.
2. In **Certificate thumbprint (optional)**, enter the thumbprint of a valid certificate and click **Save**.

   If you leave this option blank, Sage CRM looks for a suitable certificate in the following certificate store locations on the Sage CRM server:

   - **Local Computer\Personal**
   - **Local Computer\Trusted Root Certificate Authorities**

Using a demo certificate

Sage CRM 2020 R1 is supplied with a certificate you can use to sign the Outlook plugin installer (.msi) files for demonstration purposes.

You can find the demo certificate and its corresponding private key in the following location on a Sage CRM server:

- <Sage CRM installation folder>\<InstallName>\Services\OpenSSL\signing

This location contains the following:

- **SageCRMSelfSigned.cer**. Public key that is used to verify the signed .msi files. Install this public key on each client computer where users will be running the .msi files.
- **SageCRMSelfSigned.pfx**. Private key that is used to sign the .msi files. Install this private key on your Sage CRM server. The private key password is *SageCRM*.

To install the private key on a Sage CRM server:

1. Log on to the Sage CRM server as a local administrator.
2. Open Microsoft Management Console (mmc.exe).
3. Add the Certificates snap-in:
   a. Click **File | Add/Remove Snap-in**.
   b. Under **Available snap-ins**, select **Certificates** and click **Add**.
   c. Select **Computer account** and click **Next**.
   d. Select **Local computer** and click **Finish**.
   e. Click **OK** to close the dialog box.
4. Import the demo private key (SageCRMSelfSigned.pfx):
   a. In the console tree, expand nodes to select **Certificates (Local Computer) | Personal**.
   b. Right-click **Personal** and click **All Tasks | Import**.
   c. On the Welcome step, click **Next**.
   d. On the File to Import step, browse to select the **SageCRMSelfSigned.pfx** file. It is located in <Sage CRM installation folder>\<InstallName>\Services\ OpenSSL\signing. To view the private key file, you may need to set the filter to **Personal Information Exchange (*.pfx, *.p12)**.
   e. Click **Next**.
   f. On the Private Key Protection step, enter the personal key password (*SageCRM*) and click **Next**.
   g. On the Certificate Store step, ensure that the selected certificate store is **Personal** and click **Next**.
   h. Click **Finish** to import the private key.

To install the public key on a client computer:

1. Copy the **SageCRMSelfSigned.cer** file to the client computer.
2. Double-click the **SageCRMSelfSigned.cer** file and then click **Install Certificate**.
3. Follow the steps in the wizard to place the certificate in the **Local Computer\Trusted Root Certification Authorities** certificate store.

4. Add the Sage CRM server to trusted websites, so that Windows Defender SmartScreen doesn't block downloaded Outlook plugin installer (.msi) files:
    a. In Control Panel, open **Internet Options**.
    b. On the **Security tab**, click **Trusted sites**, and then click **Sites**.
    c. Enter the HTTP address of your Sage CRM server and click **Add**.
    d. Click **Close** and then click **OK**.

Email templates

System entity removed from template settings (756-171755-ENH). A list of entities to which an email template can be applied has been refactored to remove the System entity that caused an access violation error when selected.

Microsoft SQL Server

SQL Server 2017 Express. Now when you perform a new installation of Sage CRM 2020 R1 and select the **Install Microsoft SQL Server Express** option in the Sage CRM 2020 R1 setup, it installs SQL Server 2017 Express instead of SQL Server 2014 Express.

Note that when you are upgrading to Sage CRM 2020 R1, Sage CRM setup does not install SQL Server 2017 Express.

> **Warning:** If you use Microsoft SQL Server 2017 Express, Sage Support will address only those issues that can be reproduced on a Standard or Enterprise edition of the SQL Server versions listed in *Sage CRM 2020 R1 Hardware and Software Requirements*.

Support for new software

- **AWS EC2**. You can now install and use Sage CRM on an AWS EC2 instance. For details on minimum supported AWS EC2 instance configuration, see *Sage CRM 2020 R1 Hardware and Software Requirements* on the Sage CRM Help Center.
- **iOS 13**. You can use Sage CRM on mobile devices running iOS 13. For details, see *Sage CRM 2020 R1 Hardware and Software Requirements* on the Sage CRM Help Center.

- **Android 10 and 9**. You can use Sage CRM on mobile devices running Android 10 and Android 9 Pie. For details, see *Sage CRM 2020 R1 Hardware and Software Requirements* on the [Sage CRM Help Center].

Discontinued features

- **Computer Telephony Integration (CTI)**. This feature is no longer being developed. Support for CTI will be discontinued in the next Sage CRM release (2020 R2).
- **Windows 7 support**. Microsoft ended extended support for Windows 7 on 14 January 2020. For this reason, Sage CRM no longer supports Windows 7.

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2020 R1.

Note: After you install Sage CRM 2020 R1, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
704-171863-QA	Calendar	When a user opened an item in the **Tasks** view and then clicked **Cancel**, the calendar returned to the **Day** view.	This issue is fixed.
389-171819-QA	Comms/Diary	Company ID wasn't forwarded. As a result, contact information wasn't populated when a user created a new appointment or task for a company.	This issue is fixed.
394-171429-QA	Comms/Diary	When a user tried to print out a communication, Sage CRM printed out the current page instead.	This issue is fixed.
389-171818-QA	Companies/People	When a company's address was changed, the change wasn't automatically applied to a person record linked to the company.	Documentation updated.
674-171591-QA	Core Product	When a user resized the Sage CRM window, action buttons on the right-hand side disappeared.	This issue is fixed.
674-171544-QA	Core Product	Clicking the magnifying glass icon on an advanced search select field didn't display all field values.	This issue is fixed.

Issue ID	Area	Description	Status
685-171907-QA	Customization	The `CRM.FindEntity` method returned all records instead of the one whose ID was specified.	This issue is fixed.
685-171726-QA	Customization	A table-level script containing a `WHERE` clause failed to work.	This issue is fixed.
781-171888-QA	Customization Wizard	When creating a new task for a custom entity, a user encountered a 403 error.	This issue is fixed.
741-171644-QA	Dashboard	An error occurred in the notification gadget.	This issue is fixed.
685-171892-QA	Document Drop	When a user dragged and dropped an email from Outlook to Sage CRM, the email was placed in the **Deleted** folder in Outlook.	This issue is fixed.
766-171825-QA	Email Manager	In some situations, Email Manager failed to recognize administrator user name and password, returning "Invalid eWare username or password".	This issue is fixed.
685-171867-QA	Email Manager	"A password must begin with alphanumeric character" error occurred when a users password began with a non-alphanumeric character.	Documentation updated. A special character can never be used as the first character in a password.

Issue ID	Area	Description	Status
685-171625-QA	Exchange Integration	Exchange Integration failed to work displaying "Waiting for sync". This issue affected only those users whose time zone was set to (UTC - 07:00) Mountain Time (US & Canada).	This issue is fixed. If your time zone was set to **(GMT) Casablanca, Monrovia** or **(UTC) Casablanca**, after upgrading to Sage CRM 2020 R1 you need to set the time zone again.
781-171898-QA	Exchange Integration	Synchronization of a contact from Sage CRM to Microsoft Exchange returned a "Success with errors" message.	This issue is fixed.
781-171899-QA	General Issue	A system administrator couldn't modify forecasts of other users.	Documentation updated. To modify another user's forecast, your account must be selected in the **Forecaseting - Reports To** option in the settings for that user.
389-171752-QA	Groups	When a user filtered groups by name, the displayed list of groups was incomplete.	This issue is fixed.
661-171474-QA	Keyword Search	Quick Find returned incorrect search results for a custom entity.	This issue is fixed.

Issue ID	Area	Description	Status
766-171775-QA	Mail Merge	Merge fields in an email inserted blank spaces instead of actual values.	This issue is fixed.
394-171793-QA	Mobile Theme	It was not possible to add notes for a company.	By design. This customization isn't currently supported for the mobile theme. The only supported actions on mobile are `runtabgroup` and `runblock`.
733-171362-ENH	Outlook Integration	Contact and company names were missing from an appointment created in Outlook and synchronized to Sage CRM.	Documentation updated. Before creating an appointment, you must synchronize the contact to Sage CRM.
685-171750-QA	Outlook Integration - Classic	Filing an email on a Windows 10-based computer caused a "Microsoft Oulook has stopped working" error.	This issue is fixed.
389-171786-QA	Outlook Integration - Classic	There was a conflict when synchronizing a new appointment from Sage CRM to Outlook. As a result, the appointment details were lost.	Configuration change.
741-171250-QA	Quotes/Orders	The **Quoted Price Sum** field displayed the wrong value.	This issue is fixed.

Issue ID	Area	Description	Status
394-171800-QA	Reports	When a user exported a report to an Excel (.xlsx) file, the following error message was written to the log: "NumberFormat conversion error: empty string".	This issue is fixed.
123-171808-QA	Security Management	Values of the `libr_secterr` table column were not displayed in the user interface. As a result, it was impossible to view security policies applied to a document.	This issue is fixed.
783-171743-QA	Timings	In some situations it wasn't possible to adjust the time of an appointment: the applied change was not saved.	This issue is fixed.
706-171835-QA	User Interface	When running a table script, an error message similar to the following appeared in the user interface: "ImpersonateLoggedOnUser failed".	This issue is fixed.
685-171848-QA	User Interface	Logon screen displayed the wrong Sage CRM version. This issue affected users who had minimum rights in Sage CRM.	This issue is fixed.

Upgrading

You can use the Sage CRM 2020 R1 installation package to upgrade from versions 2019 R2, 2019 R1, 2018 R3, 2018 R2, 2018 R1, and 2017 R3.

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

After upgrading Sage CRM, you must log on to Sage CRM as a system administrator at least once before upgrading to the next version. This is required to update the Sage CRM database correctly.

> **Note:** Install only one Sage CRM instance per server. Sage doesn't support configurations where two or more Sage CRM instances are installed on the same server.