



# Sage CRM 2018 R3

## Software Requirements and Mobile Features

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# Software requirements

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**Warning:** Sage CRM does not support Microsoft products that have reached mainstream support end date.

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# Operating systems

Operating systems listed in this section should be either without Service Pack or with the latest Service Pack available at the time of Sage CRM 2018 R3 release.

**Note:** Install the latest updates for your version of Windows.

## Sage CRM server

Requirement	Details
Operating system	<ul style="list-style-type: none"><li>• Microsoft Windows Server 2016</li><li>• Microsoft Windows Server 2016 Essentials</li><li>• Microsoft Windows Server 2012 R2</li><li>• Microsoft Windows Server 2012 R2 Essentials</li></ul>
Web Server (IIS)	The computer on which you plan to install Sage CRM must have the <b>Web Server (IIS)</b> server role installed. Sage CRM supports Web Server (IIS) supplied with the operating systems listed above.
Installation on a domain controller	You can install Sage CRM on a domain controller if it is running one of the following: <ul style="list-style-type: none"><li>• Microsoft Windows Server 2016 Essentials</li><li>• Microsoft Windows Server 2012 R2 Essentials</li></ul> <p>On these operating systems Sage CRM does not support HTTPS, Remote Desktop Services, and CDONTS/CDOSYS.</p>

## Client computer

You can access Sage CRM from a computer running one of the following:

- Windows 10, 32-bit or 64-bit
- Windows 8.1, 32-bit or 64-bit
- Windows 7, 32-bit or 64-bit

# Database server

- Microsoft SQL Server 2017 without SP, Standard or Enterprise
- Microsoft SQL Server 2016 SP2, Standard or Enterprise
- Microsoft SQL Server 2014 SP2, Standard or Enterprise
- Microsoft SQL Server 2014 Express  
(supplied in the Sage CRM installation package)

Microsoft SQL Server 2014 Express has the following limitations:

- Sage does not recommend this SQL Server version for environments that exceed five Sage CRM users.
- Maximum memory utilized (per instance of SQL Server Database Engine): 1 GB
- Maximum relational database size: 10 GB

For detailed information about all Microsoft SQL Server 2014 Express limitations, see [Features supported by the editions of SQL Server 2014](#) on [msdn.microsoft.com](http://msdn.microsoft.com).

**Warning:** If you use Microsoft SQL Server 2014 Express, Sage Support will address only those issues that can be reproduced on a Standard or Enterprise edition of the SQL Server versions listed above.

# Web browsers

You can access Sage CRM with the following web browsers:

Browser	Must be installed on
Microsoft Internet Explorer 11 <ul style="list-style-type: none"><li>• 32-bit edition only.</li><li>• Compatibility View is not supported.</li></ul>	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Microsoft Edge	Windows 10
Mozilla Firefox (latest version)	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Google Chrome (latest version)	<ul style="list-style-type: none"><li>• Windows 10</li><li>• Windows 8.1</li><li>• Windows 7</li></ul>
Google Chrome for Android	Android 5.0 Lollipop or later
Apple Safari for iOS	<ul style="list-style-type: none"><li>• iOS 11.x</li><li>• iOS 10.x</li></ul>

- To access the **Administration** area of Sage CRM, you must use a supported web browser on a Windows-based computer.
- The Classic Dashboard is supported on Microsoft Internet Explorer only.
- On 64-bit editions of Windows, the default web browser is Microsoft Internet Explorer 32-bit. The 64-bit edition of Internet Explorer is also installed.

# Mobile devices

**Note:** Some Sage CRM features are not supported on mobile devices. For more information, see [Features available on mobile devices](#).

Sage CRM supports and is optimized for viewing on these mobile devices:

Device	Desktop theme Mobile theme
Android phone	Android 5.0 Lollipop or later
iPhone	<ul style="list-style-type: none"><li>• iOS 11.x</li><li>• iOS 10.x</li></ul>
iPad	<ul style="list-style-type: none"><li>• iOS 11.x</li><li>• iOS 10.x</li></ul>

## Mobile apps

**Note:** Some Sage CRM features are not supported on mobile devices. For more information, see [Features available on mobile devices](#).

Mobile devices on which you install the apps must meet the system requirements set in:

- [Sage CRM for Android Release Notes](#)
- [Sage CRM for iPhone Release Notes](#)



# Document Drop plugin

The plugin requires the following:

Requirement	Details
Microsoft Internet Explorer 11 <ul style="list-style-type: none"><li>• 32-bit edition only.</li><li>• Compatibility View is not supported.</li></ul>	Access Sage CRM with this web browser to install and use the Document Drop plugin.
Be a system administrator or power user on your computer	Required to install the Document Drop plugin.

# CTI plugin

The CTI (Computer Telephony Integration) plugin requires the following:

Requirement	Details
Microsoft Internet Explorer 11 <ul style="list-style-type: none"><li>• 32-bit edition only.</li><li>• Compatibility View is not supported.</li></ul>	Access Sage CRM with this web browser to install and use the CTI plugin.
Be a system administrator or power user on your computer	Required to install the CTI plugin.

# Microsoft Exchange

Sage CRM can integrate and work with the following Exchange versions:

- Microsoft Exchange Server 2016, 64-bit edition only
- Microsoft Exchange Server 2013 SP1, 64-bit edition only
- Exchange Online (part of Microsoft Office 365)

In these Exchange versions, the following features and roles must be enabled:

- Exchange Web Services (EWS)
- Application Impersonation
- Integrated Windows Authentication with Anonymous Authentication

**Note:** Sage CRM was tested with Business plans of Office 365.

## Outlook plugins

Software	Classic Outlook Plugin	Lite Outlook Plugin
Microsoft Outlook	Supports Outlook supplied with: <ul style="list-style-type: none"><li>• Microsoft Office 2016 32-bit editions (Home, Business, and Professional)</li><li>• Microsoft Office 2013 32-bit editions (Home, Business, and Professional)</li><li>• Microsoft Office 365 You must have the 32-bit desktop version of Outlook app installed on your computer.</li></ul>	Supports Outlook supplied with: <ul style="list-style-type: none"><li>• Microsoft Office 2016 32-bit and 64-bit editions (Home, Business, and Professional)</li><li>• Microsoft Office 2013 32-bit and 64-bit editions (Home, Business, and Professional)</li><li>• Microsoft Office 365 You must have the 32-bit or 64-bit desktop version of Outlook app installed on your computer.</li></ul>
Microsoft Exchange	See <a href="#">Microsoft Exchange</a> in this document.	

Software	Classic Outlook Plugin	Lite Outlook Plugin
Microsoft .NET Framework	Make sure the following versions are installed on client computers: <ul style="list-style-type: none"> <li>• Microsoft .NET Framework 4.6</li> <li>• Microsoft .NET Framework 3.5</li> </ul>	
Microsoft Internet Explorer 11 <ul style="list-style-type: none"> <li>• 32-bit edition only.</li> <li>• Compatibility View is not supported.</li> </ul>	Access Sage CRM with this web browser to install and use the Outlook plugins.	

# Citrix XenApp

Supported version	Protocols	Supported application delivery methods
Citrix XenApp 7.15, 32-bit and 64-bit editions	HTTP, HTTPS	<ul style="list-style-type: none"> <li>• Publish desktops</li> <li>• Publish applications</li> </ul>

Consider the following limitations when deploying Sage CRM via XenApp:

- Multi-server Sage CRM environments are not supported.
- Multi-server Citrix XenApp environments are not supported.
- Roaming user profiles are not supported.

# Remote Desktop Services (formerly Terminal Services)

**Note:** For more information on how to install and use Sage CRM Outlook plugins with Remote Desktop Services, see the *System Administrator Help* on the [Sage CRM Help Center](#).

Supported version	Protocols	Supported application delivery methods
RDS supplied with: <ul style="list-style-type: none"><li>Windows Server 2016 Standard</li><li>Windows Server 2012 R2 Standard or Datacenter</li></ul>	HTTP, HTTPS	Publish full desktop

Sage CRM doesn't support roaming user profiles when it is deployed and used via Remote Desktop Services.

## Virtualization

Sage CRM has been tested on VMware and should run on any standard virtualization environment.

## Proxy servers

Sage CRM doesn't support reverse proxies.

# Features available on mobile devices

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- [Ease of use](#)
- [Viewing data](#)
- [Adding, uploading, or modifying data](#)
- [Reports and workflows](#)
- [Dashboards](#)
- [Communicating](#)

## Ease of use

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
In-product help	✓		✓
Support of native device UI elements		✓	✓
Multilingual support	✓	✓	✓
Offline access			✓

# Viewing data

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
View contacts or people	✓	✓	✓
View companies	✓	✓	
View leads	✓	✓	
View opportunities	✓	✓	✓
View cases	✓	✓	
View notes	✓		✓
View recent items/history	✓		✓

# Adding, uploading, or modifying data

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Add or import people	✓	✓	✓
Add or import companies	✓	✓	✓
Add or import leads	✓	✓	✓
Add opportunities	✓	✓	
Add cases	✓	✓	
Add notes	✓		✓
Flag favorites			✓
Set phone alerts from the calendar			✓
Upload data			
Upload or attach documents			

# Reports and workflows

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Create reports	✓		
Generate reports	✓	✓	
Use workflows	✓		

# Dashboards

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Classic dashboard	✓	✓	
Interactive dashboard	✓		

# Communicating

Feature	Desktop theme on a tablet	Mobile theme	iPhone app Android app
Auto communication logging from calls, emails, and SMS			✓
Mail merge	✓		
Map linking from address details		✓	✓
Outbound call handling	✓		
Marketing campaigns	✓		