Sage CRM 2019 R2
Release Notes

Updated: August 2019

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 2019 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 2019 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 2019 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
July 2019	eWare.dll	2019.0.2
	Outlook plugin	2019.0.1
	Document plugin	2019.0.1
	CTI plugin	2019.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2019 R2.

For more information about the software with which Sage CRM 2019 R2 can work and integrate, see the *Sage CRM 2019 R2 Software Requirements and Mobile Features* guide 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 2019 R2 provides new features and enhancements in the following areas:

- REST API beta version
- Microsoft Office 2019
- Self Service
- Cases
- Entities

REST API beta version

This Sage CRM release includes a beta version of REST API. Developers and system administrators can use the REST API to programmatically create, read, update, and delete entity records in Sage CRM using HTTP requests and standard HTTP methods such as GET, POST, PATCH, and DELETE.

The REST API provides access to Sage CRM entities via URL paths. To use the REST API, you must send an HTTP request in a specific format and parse the response. The REST API always returns JSON responses. The REST API is based on open standards, and therefore you can use virtually any web development language to work with entities in Sage CRM via this API.

To use the Sage CRM REST API, you must be a system administrator in Sage CRM.

For detailed information about the Sage CRM entities exposed via the REST API, their access URLs, and request headers and parameters, see the REST API reference.

Table-level scripts and the REST API

HTTP requests sent through the REST API do trigger table-level scripts, but there are certain limitations and things to consider.

Limitations

- ActiveX objects in table-level scripts are not supported.

  This does not work:

  ```
  new ActiveXObject("Scripting.FileSystemObject");
  ```

- Context established in table-level scripts is ignored.

  This does not work:

  ```
  CRM.GetContextInfo("contextTable","fieldName");
  ```

- Values submitted in an HTTP request body cannot be read using the `Values` and `FormValues` system variables.

  This does not work:

  ```
  Values("comp_indcode") = FormValues('comp_type');
  ```

Things to consider

- You can use the `WhereClause` system variable in table-level scripts.
- You can use the `Values` system variable to set values in table-level scripts.

  This works:

  ```
  Values("comp_sector") = 'Hardware';
  ```

- You can use the `Valid` and `ErrorStr` system variables in table-level scripts.

  This works:

  ```
  Valid = false;
  ErrorStr = "wibble";
  Values("comp_field1") = 'Hardware';
  Values("comp_field2") = WhereClause
  Values("comp_field3") = ErrorStr
  ```

Microsoft Office 2019

- **Support for Office 2019 (756-171410-ENH)**. Sage CRM features that rely on Microsoft Office now support Microsoft Office 2019. The features include Classic Outlook Plugin, Lite Outlook Plugin, Mail Merge, and Export to File.

Self Service

- **New Self Service demo website**. We have bundled the reworked and improved Self Service demo website with the Sage CRM installation package. Now you can install the demo website using the **Sample Self Service support site** check box in the Sage CRM Setup.
  The new website is fully responsive and can be easily used on mobile devices. For more information about the new Self Service demo website, see the following articles on the Sage CRM Partner Community:
  - A new responsive version of the Self Service Demo
  - Demoing Self Service
- **Enhanced password security (123-171704-ENH)**. We have improved the Self Service security by changing the way we store visitor passwords in the Sage CRM database.

Cases

- **Automatic updating of tracking information (685-171440-ENH)**. When a user progresses a case in the mobile theme, the information on the **Tracking** tab is now automatically updated.

Entities

- **Apply territories to documents records**. The Documents entity has been moved from **Secondary Entities** to **Primary Entities** in **| Administration | Customization**.

  This improves security configuration capabilities by allowing system administrators to add documents records to a particular territory.

Discontinued features

- **Swiftpage integration (761-171652)**. This feature is now discontinued because Swiftpage no longer supports Swiftpage emarketing and retired this product on 30 June 2019. For more information, please visit the Swiftpage website.
- **Social network and mapping components**. The Facebook, Yammer, Twitter, and Mapping components are retired and no longer supported by Sage Support.
  We have published sample source code of the social network components on the Sage CRM Partner Community. You can download the code and use it to build your own components.
  - Sample Facebook Integration Component
  - Example Twitter Integration: C# Project code
  - Sample Twitter Integration Component
  - Sample Yammer Integration Component

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2019 R2.

Note: After you install Sage CRM 2019 R2, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
394-171567-QA	Calendar	When a user selected **Show Overdue Tasks** and clicked the right arrow to display tasks for the next week or day, the calendar showed the wrong time period.	This issue is fixed.
756-171537-QA	Companies/ People	The following issues occurred when a user deleted an account record: • An error occurred. • The deleted account record showed up in search results.	This issue is fixed.

Issue ID	Area	Description	Status
685-171633-QA	Companies/ People	The **Business E-mail** text box didn't retain the entered value when a user did the following: 1. Clicked **| New Person**. 2. Entered a person's first name, last name, and business email. 3. Clicked **Enter Person Details**.	This issue is fixed.
674-171655-QA	Core Product	Top content area showed wrong details for a person record when a user dragged and dropped a file to the record. This issue occurred when Sage CRM items were opened in multiple browser tabs.	By design. Opening Sage CRM items in another browser window or tab is not suppported.
281-171583-QA	Core Product	Sage CRM failed to properly terminate user sessions. As a result, this affected Sage CRM performance.	This issue is fixed.

Issue ID	Area	Description	Status
281-171636-QA	Core Product	Advanced search select fields failed to work when a user logged on to Sage CRM using a URL to the Sage CRM logon page that opened in a new window (target="_blank") or contained a redirect.	By design. This behavior is caused by web browsers. WORKAROUND 1 Open the Sage CRM logon screen URL in the current browser window. WORKAROUND 2 Add the following parameter to the <a> element of the HTML code opening the Sage CRM logon screen URL: rel="noopener noreferrer nofollow" **Example** <a href= "http://<SageCrmServer>/<Install>/eware.dll/ target="_blank" rel="noopener noreferrer nofollow">
746-171649-QA	Core Product	User sessions were not terminated automatically when the **Auto-logout** option was set to **Yes**.	This issue is fixed.
720-171527-QA	Core Product	The **webservice.wsdl** file included the wrong copyright year and Sage CRM version number.	This issue is fixed.
557-171158-QA	Core Product	An access violation error occurred when using one of the following: • Mail merge • **Administration | Documents | Screens**	This issue is fixed.

Issue ID	Area	Description	Status
742-171392-QA	Customization Wizard	A required field set by a primary rule in a workflow wasn't enforced on a custom entity.	This issue is fixed.
389-171665-QA	Deduplication	When deduplication was enabled, it was possible to create companies with the same name by applying a clean-up rule.	By design.
783-171597-QA	Email Client	When a user attached a file whose name contained non-English characters to an email, either an error occurred or the file wasn't delivered with the email.	This issue is fixed.
0-170766-QA	Exchange Integration	An attempt to edit an appointment created by an external organizer failed with an error "An unexpected even has occurred".	This issue is fixed.
389-171667-QA	Exchange Integration	It wasn't possible to create an Exchange Integration.	This issue is fixed.
394-171313-QA	Find	Quick Find returned duplicated results.	By design. Quick Find searches records by multiple fields. If two fields of the same record contain the same search keyword, these fields are returned as two items in search results.
386-171609-QA	Interactive Dashboard	An Interactive Dashboard gadget returned an error when Sage CRM was configured to integrate with an ERP system via SOAP.	This issue is fixed.

Issue ID	Area	Description	Status
386-171604-QA	Licensing	The License Key Updater (LicenseKeyUpdate.exe) supplied with Sage CRM didn't work.	This issue is fixed.
389-171029-QA	Lite Outlook Plugin	When a user filed an outgoing email, it was filed as an incoming email.	This issue is fixed.
685-171446-QA	Mobile Theme	Base currency wasn't applied to new opportunities.	This issue is fixed.
685-171473-QA	Mobile Theme	The value `hidden=true` entered in the **Create Script**, **OnChange Script**, and **Validate Script** options didn't hide fields on mobile devices.	This issue is fixed.
744-171666-QA	Mobile Theme	An attempt to attach an opportunity to a new communication failed.	Configuration change.
774-171270-QA	Murano Integration	When a user created a company in the context of a lead, the company didn't show up in advanced search select fields.	This issue is fixed.
0-171146-QA	Navigation	When a user viewed a communication, the **ergonomictheme.js** file caused an error to appear in the developer console of the web browser.	This issue is fixed.
685-171452-QA	Notification	An escalation rule created for an opportunity did not send notification emails.	This issue is fixed.
394-171621-QA	Outlook Integration	Outlook Lite Plugin failed to work when Sage CRM was configured to use HTTPS.	This issue is fixed.
661-171494	Reports	The **Export to XLSX** option did not work in certain cases.	This issue is fixed.

Issue ID	Area	Description	Status
742-171384-QA	Workflow	When a workflow included a Create Task action followed by a Create Appointment action, the latter failed to retain the related entity information.	This issue is fixed.
761-170854-QA	Workflow	An escalation rule filed emails against the wrong opportunity record.	This issue is fixed.
741-171187-QA	Workflow	It wasn't possible to change the organizer of an appointment created by a workflow.	This issue is fixed.

Upgrading

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

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.