



# Sage CRM 2017 R2

## Software Requirements and Mobile Features

**Revision:** IMP-MAT-ENG-2017R2-2.0

**Updated:** March 2017

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# Software requirements

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**Warning:** Sage CRM doesn't 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 2017 R2 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><li>• Microsoft Windows Server 2012</li><li>• Microsoft Windows Server 2012 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><li>• Microsoft Windows Server 2012 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 2016 SP1, Standard or Enterprise
- Microsoft SQL Server 2016 without SP, Standard or Enterprise
- Microsoft SQL Server 2014 SP1, Standard or Enterprise
- Microsoft SQL Server 2012 SP2, Standard or Enterprise

**Warning:** Do not use Microsoft SQL Server 2014 Express supplied with Sage CRM in a production environment. It is provided for demonstration and testing purposes only.

# 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 KitKat 4.4 and later   |
| Apple Safari 10  | <ul style="list-style-type: none"><li>• macOS X Sierra (10.12)</li><li>• OS X El Capitan (10.11)</li></ul> |
| Apple Safari 9   | OS X El Capitan (10.11)  |
| Apple Safari for iOS   | iOS 9.x or later   |

- 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        | Operating system            |
|---------------|-----------------------------|
| Android phone | Android 4.4 KitKat or later |
| iPhone        | iOS 9.x or later            |
| iPad          | iOS 9.x or later            |

## Mobile apps

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

The mobile device must meet the requirements set in [Mobile devices](#).

| Device               | Supported version |
|----------------------|-------------------|
| Sage CRM for iPhone  | Latest version    |
| Sage CRM for Android | Latest version    |

# 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.                                      |

## Microsoft Exchange

Sage CRM can integrate and work with the following:

- Microsoft Exchange Server 2016, 64-bit edition only
- Microsoft Exchange Server 2013 SP1, 64-bit edition only
- Exchange Online (part of Microsoft Office 365):
  - Exchange Web Services (EWS) and Application Impersonation must be enabled in Office 365.
  - 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 2010 32-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 365<br/>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 2010 32-bit and 64-bit editions (Home, Business, and Professional)</li> <li>• Microsoft Office 365<br/>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.   |   |
| 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

**Note:** Some Sage CRM features are not available when Sage CRM is deployed via XenApp. For more information see, the *System Administrator Help* on the [Sage CRM Help Center](#).

| Supported version                                | Protocols   | Supported application delivery methods  |
|--|-------------|---|
| Citrix XenApp 7.6,<br>32-bit and 64-bit editions | HTTP, HTTPS | <ul style="list-style-type: none"><li>• Publish desktops</li><li>• Publish applications</li></ul> |

## 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                   |

## Virtualization

Sage CRM can run on any virtualization environment.

# 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<br>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<br>Android app |
|-------------------------------|---------------------------|--------------|---------------------------|
| View contacts or people       | ✓                         | ✓            | ✓                         |
| View companies                | ✓                         | ✓            |                           |
| View leads                    | ✓                         | ✓            |                           |
| View opportunities            | ✓                         | ✓            | ✓                         |
| View Sage CRM Builder modules | ✓                         |              |                           |
| View cases                    | ✓                         | ✓            |                           |
| View notes                    | ✓                         |              | ✓                         |
| View recent items/history     | ✓                         |              | ✓                         |

# Adding, uploading, or modifying data

| Feature                            | Desktop theme on a tablet | Mobile theme | iPhone app<br>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<br>Android app |
|------------------|---------------------------|--------------|---------------------------|
| Create reports   | ✓                         |              |                           |
| Generate reports | ✓                         | ✓            |                           |
| Use workflows    | ✓                         |              |                           |

# Dashboards

| Feature               | Desktop theme on a tablet | Mobile theme | iPhone app<br>Android app |
|-----------------------|---------------------------|--------------|---------------------------|
| Classic dashboard     | ✓                         | ✓            |                           |
| Interactive dashboard | ✓                         |              |                           |

# Communicating

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