Sage CRM 2018 R2
Release Notes

Updated: April 2018

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 2018 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 2018 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 2018 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
March 2018	eWare.dll	2018.0.2
	Outlook plugin	2018.0.2
	Document plugin	2018.0.1
	CTI plugin	2018.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2018 R2.

For more information about the software with which Sage CRM 2018 R2 can work and integrate, see the *Sage CRM 2018 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.

New features and enhancements

Sage CRM 2018 R2 provides new features and enhancements in the following areas:

- Persons and leads
- E-marketing
- Main Menu
- Quick Find
- Calendar
- Email and SMS
- Sage 200 (Spain) integrations

> **Note:** Sage CRM 2018 R2 helps you to demonstrate readiness for key global and local legislation surrounding people data, including the GDPR, using the following new features:
> - Recording consent that you may send marketing materials
> - Deleting all documents for a person
> - Deleting all communications for a person
> - Deleting all communications for a lead
> - Deleting documents and communications in a group
> - Checking if a Person or Company record was sent to MailChimp or Swiftpage

Persons and leads

- Recording consent that you may send marketing materials
- Deleting all documents for a person
- Deleting all communications for a person
- Deleting all communications for a lead
- Deleting documents and communications in a group

Recording consent that you may send marketing materials

You can use Sage CRM to record if a person or lead has agreed to receive marketing materials from your company. You may need to do so to comply with the data privacy regulations in your country.

Each Person and Lead record in Sage CRM can have a **Consent** tab. On this tab, you can create one or multiple *consent records*. A consent record allows you to register if you have consent from the person or lead to receive marketing materials, what kind of marketing materials you can send to them, how you can send these materials, and when the granted consent expires.

> **Note:** You can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records. For details, see Sending a consent email to a group.

In this section:

- Creating a consent record
- Viewing a consent record
- Updating a consent record
- Deleting a consent record
- Sending a consent email to a person or lead
- Sending a consent email to a group
- Consent fields

Creating a consent record

1. Find and open the person or lead whose consent you want to request.

2. Click the **Consent** tab, and then click **New**.

3. Configure fields on the **Consent** tab. For more information, see Consent fields.

4. Click **Save**.

   Now you need to get in touch with the person or lead, ask them if they agree to receive marketing materials, and update the information on the **Consent** tab based on their answer.

   You can request consent from a person or lead automatically by sending a consent email. For more information, see Sending a consent email to a person or lead.

Viewing a consent record

1. Find and open the person or lead whose consent record you want to view.

2. Click the **Consent** tab.

3. Open the consent record you want to view by clicking the value in the **Contact Via** column.

Updating a consent record

1. Find and open the person or lead whose consent record you want to update.

2. Click the **Consent** tab.

3. Open the consent record you want to update by clicking the value in the **Contact Via** column.

4. Click **Change** and update the values in the consent fields. For more information, see Consent fields.

5. Click **Save**.

Deleting a consent record

> **Note:** We recommend keeping consent records because they provide an audit trail.

1. Find and open the person or lead whose consent record you want to delete.

2. Click the **Consent** tab.

3. Open the consent record you want to delete by clicking the value in the **Contact Via** column.

4. Click **Delete**, and then click **Confirm Delete**.

Sending a consent email to a person or lead

Sage CRM can automatically update the status of a consent record for a person or lead. To do so, you need to send a consent email. Your recipient can use the hyperlinks in the email to either agree to receive marketing materials, or decline your request. When a recipient clicks a hyperlink in the consent email, the status of the corresponding consent record is automatically updated in Sage CRM.

To enable consent emails, a system administrator must do the following:

- Configure standard email in Sage CRM. See the *System Administrator Help* for details.
- Ensure that Sage CRM is accessible from outside of your corporate network.

To send a consent email to a person or lead:

1. Find and open the person or lead to whom you want to send a consent email.
2. Create or open a consent record. For details, see
   - Creating a consent record
   - Viewing a consent record
3. Click **New Consent Email**.
4. In the email window that opens, from **Template**, select the **Person Consent Email** or **Lead Consent Email**.
5. Edit the email body if necessary.

   By default, the email body contains two hyperlinks containing the following variables:

   - `%CRMSubmitConsentLink%` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Consented**.
   - `%CRMSubmitConsentLink%&status=1` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Withdrawn**.

   When you send a consent email, the variables are transformed into URLs unique to the recipient.

   > **Warning:** Do not delete these hyperlinks or change the variables, because they are used to update the status of the corresponding consent record in Sage CRM.

6. Complete the remaining email fields.
7. Click **Send Email**.

Sending a consent email to a group

You can automatically create and update consent records for multiple persons or leads by sending a consent email to a group containing Person or Lead records.

To enable consent emails, a system administrator must do the following:

- Configure standard email in Sage CRM. See the *System Administrator Help* for details.
- Ensure that Sage CRM is accessible from outside of your corporate network.

To send a consent email to a group:

1. Create or open a group containing Person or Lead records.
2. Click **New Consent Email**.
3. Under **Consent details**, complete the consent fields. For more information, see Consent fields.
4. Under **E-mail Options**, from **Template**, select the **Person Consent Email** or **Lead Consent Email** template.
5. Edit the email body if necessary.

   By default, the email body contains two hyperlinks containing the following variables:

   - `%CRMSubmitConsentLink%` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Consented**.
   - `%CRMSubmitConsentLink%&status=1` When a recipient clicks the hyperlink containing this variable, the consent record status is changed to **Withdrawn**.

   When you send a consent email to a group, the variables are transformed into URLs unique to each recipient.

   > **Warning:** Do not delete these hyperlinks or change the variables, because they are used to update the status of the corresponding consent records in Sage CRM.

6. Complete the remaining email fields.
7. To send the email to the group, click **Send Email** and click **OK**.

   When you send a consent email to a group, Sage CRM automatically creates a consent record for each Person or Lead record in that group. Sage CRM automatically updates the consent record status based on what hyperlink each recipient clicks in the consent email.

Consent fields

When creating or updating a consent record, you can use the following fields:

Field	Description
Created	Date and time when the consent was created.
Contact via	How you would like to contact the person or lead. Possible values: ● **Email** ● **Phone call** ● **SMS** ● **Post**
Contact purpose	What kind of marketing materials you want to send to the person or lead. Possible values: ● **E-marketing materials** ● **Sales offers** ● **Third-party offers**
Requested	Date and time when you requested the consent. When you send a consent email, this field is populated automatically.
Valid until	Date and time when the granted consent expires.
Campaign	Marketing campaign to which the consent record relates.
Status	Current consent status. Possible values: ● **New**. Automatically assigned when you create a new consent record. ● **Requested**. Indicates that you have requested the person or lead to provide their consent and are awaiting their reply. ● **Consented**. Indicates that the person or lead has given their consent to receive marketing materials from you. ● **Withdrawn**. Indicates that the person or lead has declined your request or withdrawn their consent. **Note:** When you send a consent email, the **Status** field is updated automatically. For more information, see Sending a consent email to a person or lead.

Deleting all documents for a person

A system administrator can permanently delete documents for a person. Note that in some cases Sage CRM deletes only links to documents.

Your action	Result
You delete documents that are not linked to any other records in Sage CRM.	Sage CRM permanently deletes the documents.
You delete documents that are linked to other records in Sage CRM.	Sage CRM deletes only links to the documents from the Person record, but keeps the underlying documents.

1. Log on to Sage CRM as a system administrator.
2. Ensure mass operations are enabled:
    a. Go to **<My Profile> | Administration | System | System Behavior**.
    b. Set **Allow mass operations** to **Yes**.
3. Back up the database and ensure all users are logged out of Sage CRM.
4. Find and open the person whose documents you want to delete.
5. Click the **Documents** tab.
6. Click **Delete All Documents**, then **Confirm Delete**.

Deleting all communications for a person

A system administrator can soft delete communications for a person. Note that in some cases Sage CRM deletes only links to communications.

Your action	Result
You delete communications that are not linked to any other Person records in Sage CRM.	Sage CRM flags the communications as deleted and the communications are no longer visible to the users.
You delete communications that are linked to other Person records in Sage CRM.	Sage CRM deletes only links to the communications from the Person record, but keeps the communications and links to other Person records associated with the communications.

1. Log on to Sage CRM as a system administrator.
2. Ensure mass operations are enabled:
   a. Go to **<My Profile> | Administration | System | System Behavior**.
   b. Set **Allow mass operations** to **Yes**.
3. Back up the database and ensure all users are logged out of Sage CRM.
4. Find and open the person whose communications you want to delete.
5. Click the **Communications** tab.
6. Click **Delete All Communications**, then **Confirm Delete**.

Deleting all communications for a lead

A system administrator can soft delete communications for a lead. Note that in some cases Sage CRM deletes only links to communications.

Your action	Result
You delete communications that are not linked to any other Lead records in Sage CRM.	Sage CRM flags the communications as deleted and the communications are no longer visible to the users.
You delete communications that are linked to other Lead records in Sage CRM.	Sage CRM deletes only links to the communications from the Lead record, but keeps the communications and links to other Lead records associated with the communications.

1. Log on to Sage CRM as a system administrator.
2. Ensure mass operations are enabled:
    a. Go to **<My Profile> | Administration | System | System Behavior**.
    b. Set **Allow mass operations** to **Yes**.
3. Back up the database and ensure all users are logged out of Sage CRM.
4. Find and open the lead whose communications you want to delete.
5. Click the **Communications** tab.
6. Click **Delete All Communications**, then **Confirm Delete**.

Deleting documents and communications in a group

A system administrator can delete documents and communications from Person and Lead records in a group. Note that in some cases Sage CRM deletes only links to documents or communications.

Your action	Result
You delete a document or communication for all of its associated Person and Lead records in Sage CRM.	Sage CRM does the following: • Permanently deletes the document. • Flags the communication as deleted. The communication is no longer visible to the users.
You delete a document or communication for some of its associated Person and Lead records in Sage CRM.	Sage CRM deletes only links to the document or communication from the records. Sage CRM keeps the document or communication and links to other records associated with the document or communication.

1. Log on to Sage CRM as a system administrator.

2. Ensure mass operations are enabled:

   a. Go to **<My Profile> | Administration | System | System Behavior**.

   b. Set **Allow mass operations** to **Yes**.

3. Back up the database and ensure all users are logged out of Sage CRM.

4. Click **My CRM | Groups**.

5. Click the name of the group that includes the documents and communications you want to delete.

6. To exclude Person or Lead records from the delete operation, select the **Exclude** check box next to the records.

7. Click **Mass Delete**.

8. In the dialog box that opens, select the check boxes next to the items you want to delete.

9. Click **Delete**. If prompted, confirm that you want to delete the selected items.

E-marketing

-
-

Viewing MailChimp campaign results for a Person or Company record

> **Note:** Your account must have rights to use MailChimp campaigns.

1. Open the Person or Company record for which you want to view the MailChimp campaign results.
2. Click the **Marketing** tab and see the MailChimp campaign results.

Column	Description
Campaign Name	Shows the name of the MailChimp campaign that was used to email the recipient.
Group	Shows the name of the Sage CRM group that was used in the MailChimp campaign.
Status	Shows if the MailChimp campaign is saved or sent.
Email Open Count	Shows how many times the recipient opened the email.
Clicked URLs	Shows how many times the recipient clicked the links in the email.
Email Bounced	Shows if the email has hard or soft bounced.
Unsubscribed	Shows if the recipient has unsubscribed from the campaign.

Checking if a Person or Company record was sent to MailChimp or Swiftpage

1. Open the Person or Company record you want to check.

2. On the **Summary** tab, see the value of the **This record was sent to** option.

   Possible values:

   - **<blank>** Indicates that the record hasn't been sent to MailChimp or Swiftpage.
   - **MailChimp**
   - **Swiftpage**
   - **MailChimp and Swiftpage**

> **Note:** To completely remove the personal data of a contact with whom you communicated using MailChimp or Swiftpage, you need to manually remove the contact from those systems. For details, see the documentation provided by MailChimp and Swiftpage.

Main Menu

Main menu optimized for long item names and narrow screens (0-168609-ENH). User preferences have been updated to include the **Display three-line menu** option. You can use this option to select how the main menu is displayed.

Possible values:

- **Always**. Moves all main menu items, both standard and custom, to a three-line menu (☰) located in the top left corner of the Sage CRM screen. Use this value when the main menu doesn't fit in the Sage CRM screen because it includes many items or the item names are too long.

- **Automatically**. Moves all main menu items to the three-line menu (☰) on narrow screens only. Otherwise, the main menu is displayed at the top of the screen.

Quick Find

Configurable search results in Quick Find (0-170140-ENH). A system administrator can configure the maximum number of results displayed in Quick Find. To do so, go to **<My Profile> | Administration | System | Quick Find**, click **Change**, and then select a value in the **Maximum number of results** option.

Calendar

- **Configurable date format**. Calendar views now show dates in the format set in **<My Profile> | Preferences | Date format**.

- **Filters are available in all calendar views**. The **Action** and **Status** filters are available in all calendar views. The filters retain the selected action and status for the duration of a user session even if a user goes to a different Sage CRM area and then returns to the calendar. The filters revert to the default values at next logon.

Email and SMS

The **Use TLS for SMTP** and **Use TLS for SMS** check boxes no longer support Transport Layer Security (TLS) version 1.0 and Secure Sockets Layer (SSL). When selecting these check boxes, ensure that the email server to which Sage CRM connects is configured to use TLS 1.1 or 1.2.

Use TLS for SMTP and **Use TLS for SMS** are available in the following Sage CRM areas:

- **<My Profile> | Administration | Email and Documents | Email Configuration**

- **<My Profile> | Administration | Email and Documents | Email Management Server Options**

Sage 200 (Spain) integrations

- **Merge duplicate persons** (0-169272-ENH). On an integrated system, you can merge duplicate Person records. For example, you can use a Person record linked to an Account record as a merge operation source.

- **Company update based on Account** (0-169561-ENH). When an Account record is updated on Sage 200 (Spain) with integrated Sage CRM, the related Company record is updated automatically to reflect the change.

- **Populate the ProfitTotal property** (0-169464-ENH). When integrated with Sage 200 (Spain), Sage CRM can now be configured to populate the `ProfitTotal` property in the following tables and fields:

  - `Orders` | `Orde_int_profittotal`

  - `OrderItems` | `Orit_int_profittotal`

  - `Quotes` | `Quot_int_profittotal`

  - `QuoteItems` | `Quit_int_profittotal`

Addressed issues

This section lists the issues reported by our customers that are addressed in Sage CRM 2018 R2.

Note: After you install Sage CRM 2018 R2, clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly.

Issue ID	Area	Description	Status
0-170015-QA	.NET API	A record being edited by a user wasn't locked for editing for other users.	This issue is fixed.
0-170006-QA	.NET API	When a user clicked the **Continue**, **Save**, or **Cancel** button on a custom screen, the wrong screen opened.	This issue is fixed.
0-170469-QA	Address Linking	An error occurred when a user clicked the icon in the **Link Status** column.	This issue is fixed.
0-169628-QA	Cases, Communications	ISSUE 1 A mail merge document created in the context of a quote was linked to the wrong Case record. ISSUE 2 When a user selected a Person record in a new appointment, the **Company** field wasn't populated automatically. This issue occurred only on integrated systems that had the Account entity.	This issue is fixed.
0-170003-QA	Cases	`eware_default_values` returned duplicate reference IDs.	This issue is fixed.

Issue ID	Area	Description	Status
0-170278-QA	Cases	When a user clicked a workflow action and then created and saved an appointment, an error occurred.	This issue is fixed.
0-170023-QA	Comms/Diary	When a user clicked the **Save** button, the record wasn't saved and no error message was displayed. This issue occurred when some of the required fields were left blank.	This issue is fixed. The *<date>* **ewaresystem.log** file now provides information about the required fields that weren't populated.
0-169911-QA	Companies / People	The Company Name Cleanup rules weren't applied.	This issue is fixed.
0-170062-QA	Core Product	Sage CRM performance degraded after upgrading. This issue occurred only when the **Use https** check box was selected in the Sage CRM Setup wizard during upgrading.	Configuration change. 1. Log on to Sage CRM as a system administrator. 2. Go to **<My profile> | Administration | System | System Behavior**. 3. Click **Change**. 4. Change the value in **Custom server name for internal reqs** to an HTTPS URL. For example: *https://localhost*. 5. Click **Save**.
0-170109-QA	Core Product	When a user used the **Search** box to find a renamed group, the group wasn't found.	This issue is fixed.

Issue ID	Area	Description	Status
0-170173-QA	Core Product	When a user downloaded an .xlsm file, the file was downloaded as a .zip archive.	This issue is fixed
0-170153-QA	Customization	Custom fields weren't deleted.	This issue is fixed.
0-169617-QA	Customization	When a user opened a record, the default record tab wasn't selected.	This issue is fixed.
0-169800-QA	Customization	When a system administrator tried to update a block, an error occurred.	Configuration change.
11-170223	Database	When a person associated with an opportunity was deleted, the person was still displayed in the top content section and in the **For** panel of the opportunity.	This issue is fixed.
0-170207-QA	Document Drop	A file wasn't attached to a task when a user did the following: 1. In **My CRM Calendar** or **Team CRM Calendar | Tasks** view, clicked **Drop files here**. 2. Browsed for and selected a file. 3. Filled in the task fields and clicked **Save**.	This issue is fixed.
0-170416-QA	Documentation	The `Height` and `Width` properties of the `CRMEntryBlock` object weren't documented in the Developer Help.	This issue is fixed.

Issue ID	Area	Description	Status
0-169953-QA	Email Client	Custom HTML code didn't work in email templates.	This issue is fixed. Please note that the following items are not allowed in the HTML code for security reasons: • iFrames • `<script>` and `<meta>` tags • **onClick**, **onLoad**, and **onError** handlers
0-169322-QA	Email Manager	Email attachments were not filed.	This issue is fixed.
0-170314-QA	Email Manager	When a user tried to send an email, an error occurred.	This issue is fixed.
0-169756-QA	E-marketing	When a user tried to create a follow-up task for a call, the new task window didn't open.	This issue is fixed.
0-169853-QA	E-marketing	The **Send to MailChimp** button was missing on a custom entity record.	By design. Documentation updated. The **Send to MailChimp** button is present only when the requirements set in the following help topics are met: • Adding contacts to a MailChimp list • Creating a MailChimp campaign
0-170080-QA	Exchange Integration	In Microsoft Outlook, the wrong time zone was used for the date and time of appointments.	This issue is fixed.

Issue ID	Area	Description	Status
0-169929-QA	Integrations	When a user imported a new company using data upload, Sage CRM created a new Company and Account records, but the Account record wasn't synchronized.	This issue is fixed.
0-170045-QA	Integrations	Phone and fax numbers were not synchronized.	By design.
0-170073-QA	Interactive Dashboard	A contextual dashboard for a company showed communications for other companies.	Cannot fix.
0-170130-QA	Interactive Dashboard	A gadget based on a report displayed an "Invalid data" error. This issue occurred when the report contained non-English characters.	This issue is fixed.
0-169920-QA	Interactive Dashboard	When a user selected an Interactive Dashboard gadget, a "List index out of bounds" error occurred.	This issue is fixed.
0-169803-QA	Interactive Dashboard	The Drill Down icon was missing from a gadget based on Opportunity.	This issue is fixed.
0-169773-QA	Interactive Dashboard	When a user viewed the Interactive Dashboard in the context of a company, the **Pending communications** gadget showed communications for unrelated companies.	This issue is fixed.
0-169979-QA	Interactive Dashboard	Thousands separators weren't shown in gadgets. This issue affected fields whose type was **integer**.	By design. WORKAROUND Change the field type to **numeric**.
0-169765-QA	Interactive Dashboard	An Interactive Dashboard gadget based on a report showed outdated information.	This issue is fixed.
0-169959-QA	Mail Merge	When a user merged a quote to Microsoft Word by using a workflow action, quote items were missing from the generated document.	This issue is fixed.

Issue ID	Area	Description	Status
0-170088-QA	Mail Merge	Fields added by a user were missing from the generated Word document.	By design. To include additional fields in the generated Word document, a system administrator must add them to the corresponding Mail Merge View. For details, see Editing a view in the System Administrator Help.
0-169780-QA	Mail Merge	When a user tried to select a custom email template on a custom entity record, an "Access violation" error occurred.	This issue is fixed.
0-170228-QA	Mobile Theme	When the Opportunity **Status** (**oppo_status**) field was configured as read-only, it didn't save the default value.	This issue is fixed.
0-170053-QA	Mobile Theme	A custom Search Select Advanced (SSA) field didn't filter items in the context of a company.	This issue is fixed. You must manually add a restrictor to the SSA field. For more information, see Configuring SSA fields on a mobile device in the Troubleshooting Help.
0-170267-QA	Mobile Theme	The default value of a field wasn't automatically set in the mobile theme.	Cannot fix.
0-170275-QA	Mobile Theme	A Search Select Advanced field didn't work on mobile devices.	Cannot fix.
0-170142-QA	Mobile Theme	In certain cases, the **New** button was missing from mobile screens. As a result, users couldn't create new Communication, Opportunity, or Case records.	This issue is fixed.

Issue ID	Area	Description	Status
0-170051-QA	Mobile Theme	When using the Mobile Theme, a user wasn't able to add or edit an Opportunity record.	This issue is fixed.
0-167899-QA	Navigation	When a user clicked the **New** button on a new Person record, it wasn't possible to select an entity. This issue occurred in the legacy Sage Theme.	Won't fix. To provide the best possible user experience, Sage CRM now uses and supports the Contemporary Theme only. WORKAROUND To select an entity in the context of a Person record, right-click the **New** button.
0-170250-QA	Notifications	When Sage CRM was configured to send a notification email upon selection of a check box, no emails were sent.	This issue is fixed.
0-170055-QA	Notifications	When Sage CRM was configured to use HTTPS, an extra forward slash (/) appeared in URLs after the server name.	This issue is fixed.
0-169496-QA	Outlook Plugin - Lite	A scheduled email wasn't sent.	Configuration change.
0-170025-QA	Outlook Plugin - Classic	Filing an email caused Microsoft Outlook to crash.	This issue is fixed.
0-169698-QA	Quick Find	Search results were sorted incorrectly in Quick Find.	This issue is fixed.
0-170035-QA	Quick Find	Quick Find didn't work on some servers in a multi-server environment.	This issue is fixed.
0-169963-QA	Reports	When Advanced Find was disabled for a report, the report continued to use Advanced Find.	This issue is fixed.

Issue ID	Area	Description	Status
0-169656-QA	Reports	Enabling the chart option in the report builder removed functions such as Sum and Maximum, and only left the Count option.	This issue is fixed.
0-169965-QA	Sales Forecasting	A forecast showed calendar year instead of fiscal year.	By design.
0-169627-QA	Web Services	Updating a customer failed with an error on an integrated system.	This issue is fixed.
0-169630-QA	Workflow	A Word document created by a workflow didn't have type and category set. This issue occurred on the **Documents** tab of a record.	This issue is fixed.
0-169615-QA	Workflow	The due date of a task created by a workflow was earlier than the start date.	This issue is fixed.

Upgrading

You can use the Sage CRM 2018 R2 installation package to upgrade from versions 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.