Sage CRM 7.2 Release Notes

Introduction

These release notes are for Sage OpCos, Sage CRM partners, and Sage CRM customers.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

Who can install this release?

The install options available for 7.2 are as a full install.

The **full install** can be used for:

- A new install of 7.2
- An upgrade from 7.1 SP1 or SP2

Note: It is possible to upgrade directly from 7.1 to 7.2, however, it is recommended practice to upgrade to 7.2 via 7.1 SP1 or SP2. For example, upgrading straight from 7.1 to 7.2 results in report charts not displaying correctly on an iPad (see known issue 550-151233 at the end of these notes).

Date of Release

April 2013

Version Numbers

Release Version: 7. 2

DLL Version: 7.2.0.1

Doc Plugin: 7.2.0.1

Outlook Plugin: 7.2.0.1

CTI Plugin: 7.2.0.1

CRM Document Version Code for these Release Notes

SYS-REA-ENG-720-1.0

Documentation

The following new/updated documentation is available with this release:

Description	Version Code
Release Notes	SYS-REA-ENG-720-1.0
Release Preview	SYS-REL-ENG-720-1.0
Software Support Matrix	IMP-MAT-ENG-720-1.0
User Guide	USE-MAN-ENG-720-1.0
System Administrator Guide	SYS-MAN-ENG-720-1.0
Context Sensitive User Help	USE-HLP-ENG-720-1.0
Context Sensitive System Admin Help	SYS-HLP-ENG-720-1.0
Installation and Upgrade Guide	IMP-UPG-ENG-720-1.0
Mobile Guide	IMP-WMG-ENG-720-1.0
Quick Start Guide	USE-QSG-ENG-720-1.0
Self Service Guide	IMP-SEL-ENG-720-1.0
CTI Guide	IMP-CTI-ENG-720-1.0

The PDFs of the above are available on the Sage CRM Community web site (https://community.sagecrm.com/user_community/m/72_documentation/default.aspx). Please check this location for the latest versions of the PDFs.

The User and System Administrator help can also be accessed on the Sage CRM Community:

https://community.sagecrm.com/userhelp/

https://community.sagecrm.com/adminhelp/

Issues List

The following cases have been addressed in Sage CRM version 7.2. **Note**: The message "This issue could not be reproduced" in the Status column means the issue could not be reproduced on the latest version. An upgrade to the latest version should resolve the issue.

Ref ID	Area	Description	Status
0-145890-QA	Address Linking	Not able to update an Address because the option was greyed out.	This issue could not be reproduced.
0-146392-QA	Component Management	Issues with the Component Manager that was unable to process whether a table name or a table caption was used when calling AddColumn or AddCustomEdits.	This issue is fixed.
0-148482-QA	Companies / People	Account Manager drop-down not alphabetically sorting.	This issue is fixed. See also 0-145761-QA.
0-146260-QA	Configuration	Links to German documentation on Welcome Dashboard not working.	This issue is fixed.
0-148148-QA	Configuration	Although the Country code and area code were switched off in System Behaviour in CRM, they were still present when using the iPad (Tablet).	This issue could not be reproduced.
0-144156-QA	Core Product	Two entries were missing in the Pricing List drop-down menu. They only appeared in the Administration | Customization area.	This issue could not be reproduced.
0-144490-QA	Core Product	SQL error in the Quick Look view for Companies after adding oppo_weighted to the Opportunity Quick Look list.	This issue could not be reproduced.
0-147007-QA	Core Product	It was possible for users to gain access to other users' calendar information and to some Administrator functions.	This issue is fixed.
0-148149-QA	Core Product	On the iPad, not able to go back to the Company screen after selecting a Person from that Company screen.	This issue is fixed.
0-144836-QA	Currency	Not able to use the comma as a decimal point, and the space character as the thousand delimiter.	This is by design. Users can set their decimal and separator preferences - once set, these should be followed, otherwise CRM will strip out unexpected characters.
0-136336-QA	Customization	By default, some user profiles did not get a default "new" screen that was relevant to their user rights.	This issue is fixed.

Ref ID	Area	Description	Status
0-137788-QA	Customization	When creating a custom entity and using Button_Default, the change button was still available for users with view-only rights to the entity.	This issue has already been fixed in previous versions of Sage CRM. The correct way to add security to asp pages is to add the buttons using Container.AddButton(CRM.Button("", ""))
0-138494-QA	Customization	When creating a new Search Select Advanced field, if its type was changed from text to selection to text again, results for this field containing special characters would not be returned.	This issue is fixed.
0-139751-QA	Customization	Some custom Client Side script files were not picked up in two areas of Sage CRM.	This issue is fixed. We recommend the use of the new client side API available from 7.2 as a supported global entry point for custom javascript files.
0-144246-QA	Customization	Not able to create a new table when using CRM with SQL 2005. No problem with SQL 2008.	This case is closed. CRM 7.2 only supports 2008 R2.
0-147113-QA	Customization	Could not enter more than 200 characters in the Custom Content box when working in Chrome.	This issue could not be reproduced. **Note**: Chrome is compatible with the Main Menu area of Sage CRM. The Administration area is supported in IE only.
0-148695-QA	Customization	Creating a new field on Case Progress broke the hyperlink to the person assigned to the case.	This issue is fixed.
0-148823-QA	Customization	Using Search Select on three custom Search Select Advance fields returned the wrong address for the company it was searching for.	This issue could not be reproduced.
0-146061-QA	Customization Wizard	Mail Merge context issue with a custom entity.	This issue could not be reproduced.
0-143527-QA	Dashboard	When the IE window was too small, the dashboard menu and tabs did not scroll with the horizontal scroll bar.	This issue could not be reproduced.
0-148274-QA	Database	Coalesce functions on Primary Keys in CRM caused delays in the SQL Server.	This issue could not be reproduced.
0-144130-QA	Data Upload	Data Upload from a XLS file to a date-only field in CRM failed.	This issue could not be reproduced.
0-146593-QA	Data Upload	Duplicate Company record not detected in Data Upload.	This issue could not be reproduced.

Ref ID	Area	Description	Status
0-148522-QA	Data Upload	Not able to have two separate address records for the same company in CRM via Data Upload. Instead, CRM creates one address field with two address types.	This is by design.
0-137800-QA	Comms/Diary	It was not possible to reassign an existing communication to a new person.	This issue is fixed.
0-139347-QA	Comms/Diary	There were empty lines between Person, Company and Phone-Details in the Tasks on the Calendar.	This issue is fixed.
0-143638-QA	Comms/Diary	There was no demarcation line between two meetings, if one started at the same time that the other ended.	This issue is fixed.
0-143853-QA	Comms/Diary	Overdue tasks did not appear in the Calendar when the "View Next 7 Days" option was set, even though the Show Overdue Task option was checked.	This issue is fixed. When checked, the Show Overdue Tasks option displays all overdue tasks regardless of the selected time range.
0-144074-QA	Comms/Diary	When an "end time" column was set in the communication list, the start and end dates of a task were inverted in the Calendar.	This issue is fixed.
0-144779-QA	Comms/Diary	If the assigned user of a task was removed, the task did not appear in the user's Team CRM Calendar.	This issue could not be reproduced.
0-145899-QA	Comms/Diary	If a task was created and assigned to a team, it would not show up in the team's calendar.	This issue is fixed.
0-146830-QA	Comms/Diary	Using Outlook Classic plug-in with CRM, it was possible to manually remove the organizer of an appointment that was synchronized with Outlook.	This issue is fixed. Because of the way Exchange works, the organizer field cannot be changed once an appointment is made as this could lead to deduping issues later on.
0-147428-QA	Comms/Diary	Rescheduling an appointment also reverted it to a 30-minutes time slot.	This issue is fixed.
0-147442-QA	Comms/Diary	Not able to create a task after removing the comm_location field from the CustomCommunicationDetail box.	This issue is fixed.
0-147481-QA	Comms/Diary	Adding aCommunication:Details field to a list did not make the body of an email appear in the Details column.	This issue is fixed. To see the body of an email (in HTML format), the comm_email field must be added to the list.
0-147577-QA	Comms/Diary	The attachment icon did not show up on the Communication List, if the list was edited.	This issue is fixed. See also case 0-147213-QA.

Ref ID	Area	Description	Status
0-147686-QA	Comms/Diary	Times and dates in communications were not incremented correctly.	This issue is fixed. This was already raised in 0-126089-QA. Automatic incrementation on comm_datetime in tasks is done using the custom sys parameter "NewTaskDueDefault".
0-147696-QA	Comms/Diary	Script error when selecting the "Start Date" in New Task.	This issue could not be reproduced.
0-148112-QA	Comms/Diary	Save icon was not visible if Subject field in a new task was left blank.	This issue is fixed.
0-148147-QA	Comms/Diary	Not able to search communications in a company, using the Status - All Types filter.	This issue could not be reproduced.
0-148166-QA	Comms/Diary	The Email Reminder for tasks were not sent if the variable #cmli_comm_userid# was used in the Email.	This issue could not be reproduced. Also applies to case 0-142052-QA.
0-148331-QA	Comms/Diary	In 7.0, looking at the communications of a deleted user in CRM, it was still possible to see the name of the user. This is no longer the case from 7.1 onwards.	This is by design.
0-148534-QA	Comms/Diary	It was possible to create tasks without an assigned user even if cmli_comm_serid was set as a required field.	This issue is fixed.
0-148654-QA	Comms/Diary	Not able to save and/or preview a new task created from the Person list.	This issue is fixed.
0-148760-QA	Comms/Diary	The word "Month" was badly translated in German.	This issue is fixed.
0-148771-QA	Comms/Diary	After doing a Communication Search, if the user clicked to open one of the results, and then clicked Cancel, the user would get sent to a different results page.	This issue is fixed.
0-148829-QA	Comms/Diary	Once a communication was saved following a successful mail merge, it was incorrectly handled by Delete screen.	This issue is fixed.
0-148893-QA	Comms/Diary	Not able to detect local files references when sending an e-mail from CRM.	This issue is fixed.
0-149710-QA	Comms/Diary	When comm_isalldayevent was removed from the Communication screen, it was not possible to create a new task.	This issue is fixed.
0-149962-QA	Comms/Diary	Error message displayed when creating new task, changing the start date and start time.	This issue could not be reproduced.
0-134056-QA	Documentation	A setting in the Documents and Reports Configuration was not properly documented.	This issue is fixed.

Ref ID	Area	Description	Status
0-149690-QA	Documentation	Issues running Sage CRM 7.1 with JRE 7.	This issue could not be reproduced. JRE 7 supported from 7.2.
0-147213-QA	Document Drop	Add Attachment button on Communication not working as expected.	This issue could not be reproduced. See also Case 0-147577-QA.
0-148091-QA	Document Drop	Users are forced to stop the Application Pool service to delete documents folders created during the Document Drop process.	This is by design.
0-141837-QA	E-mail Client	Emails sent from CRM were sporadically sent to the recipient's junk folder.	This issue is closed. Sage CRM just sends the emails but does not control how they are received by the recipient.
0-142683-QA	Exchange Integration	Exchange Synchronization Error.	This issue could not be reproduced.
0-147841-QA	Exchange Integration	Creating an appointment with an organizer not set up on Exchange prevented the appointment from being synced.	By design. Only appointments with a CRM Sync User set up as an organizer should be synced to Exchange. Otherwise, the appointment will not be synchronized.
0-148076-QA	Exchange Integration	Exchange failed for everyone when a specific user was enabled for sync.	This is by design. A TLS that was affecting the exchange sync on a remote session. CRM does support TLS on communication table when there is a live exchange integration.
0-143497-QA	Export Data	When exporting data from a static list, excluded records were still being processed.	This issue is fixed.
0-144748-QA	Export Data	Issues with the formatting of the .XSL error file generated after Data Upload.	This issue could not be reproduced.
0-141866-QA	Interactive Dashboard	It was not possible to export reports to XLS and XLSX after installing JRE 64 bit update 29.	This issue is closed. It is an unsupported scenario.
0-142410-QA	Interactive Dashboard	It was not possible to create a Record Summary gadget for a custom entity.	This is by design. It is necessary to have an integer field in the report contents to be able to create a Summary Gadget.

Ref ID	Area	Description	Status
0-143983-QA	Interactive Dashboard	When creating a list gadget based on a company report, the columns in the gadget were not sorted according to the report's criteria.	This issue is fixed. List gadgets are now sorted according to the first criterion in the report's Sorted By column, provided that this column is visible. Please note, that list gadgets do not behave like reports, they can only be sorted by one column. The display in a report and in a list gadget will differ slightly because of this. Also relates to 0-149060-QA.
0-144186-QA	Interactive Dashboard	When working with CRM with an HTTPS connection, users would get a warning message in the gadgets asking if they wanted to see only the secure content.	This issue could not be reproduced.
0-144221-QA	Interactive Dashboard	It was not possible to sort by or filter by Assigned To/ Territory within a list gadget.	This issue is fixed. The List Gadget was updated so that fields can be properly filtered and sorted by. A new view has been created for Territories.
0-144854-QA	Interactive Dashboard	On a French install, it was impossible to create a Main Menu Item gadget based on a custom system Menu.	This issue is fixed.
0-145264-QA	Interactive Dashboard	Using an auto-login script for Sage CRM caused users that were already logged in to lose the functionality of the Interactive Dashboard.	This issue is fixed.
0-146120-QA	Interactive Dashboard	If the Interactive Dashboard was disabled, users would get logged out of CRM, even if the Default Screen for Companies was set to Summary, instead of Interactive Dashboard.	This issue is fixed. If the Interactive Dashboard is disabled, the default screen for Company and Account is the Summary tab, even if selected default screen for these entities is Dashboard.
0-146717-QA	Interactive Dashboard	Dashboard templates were visible to everyone, even the users who did not have the proper rights.	This issue is fixed.
0-146835-QA	Interactive Dashboard	There was a problem with the JDBC connection, which prevented the Gadgets from working.	This issue is fixed.

Ref ID	Area	Description	Status
0-147124-QA	Interactive Dashboard	List gadgets for Cases in the Interactive Dashboard (example: Open Cases by Agent) would not be updated if the status of the list items changed.	This issue is fixed. The following lists and reports have also been fixed: CasesOpenbyCompany, CasesOpenbySeverity,MyOpenCasesbySeverity, MyOpenCasesbyStage,OpenCasesbyAgent,Open CasesbyProduct
0-147992-QA	Interactive Dashboard	It was not possible to display a LinkedIn Search in a Company List Gadget.	This issue is fixed. This is due to LinkedIn blocking content browsing within frames. Doing a LinkedIn Search in CRM now opens it in a new window.
0-148013-QA	Interactive Dashboard	The List gadget in the Interactive Dashboard did not return the value of custom Select Advanced Search fields according to the Report they were based on.	This issue is fixed. See 0-143983-QA for more details.
0-148272-QA	Interactive Dashboard	The Calendar gadget did not display weeks in the same way as the Calendar pop-up in the Calendar tab.	This issue is fixed. The first day of the week is the same for both calendars and corresponds to the first weekday specified in CRM	User Preferences.
0-148817-QA	Interactive Dashboard	User wanted the "Cancel" button in the appointments/tasks edit mode to bring them back to the Dashboard, instead of to the Communication List view.	This issue could not be reproduced.
0-148917-QA	Interactive Dashboard	Duplicated fields on a List gadget about opened opportunities.	This issue is fixed.
0-147201-QA	Dashboard (Interactive)	Error on Company Dashboard when SData Read-only access set to No.	This issue could not be reproduced.
0-147916-QA	Leads	In Leads, it was not possible to see the full company name of a lead in a list of communications.	This is by design. There are two company fields for this view. The user must choose between seeing the full name of the company (Comp_name), or the name of the company as it was typed by the user (Lead_companyname).
0-147198-QA	Library and Templates	Data in e-mail templates for custom entities showing code rather than translation.	This issue could not be reproduced.
0-145915-QA	Mail Merge	Too many decimal places showing in merged document.	This issue could not be reproduced.

Ref ID	Area	Description	Status
0-146173-QA	Mail Merge	Performing a Mail Merge online created line breaks in the document.	This issue could not be reproduced.
0-147112-QA	Mail Merge	When doing a Mail Merge and saving it as a communication, if the user forgot to enter the subject of a mail, and added it after being prompted to by the Validation Error, the subject would not be saved in the communication.	This issue is fixed.
0-147234-QA	Mail Merge	It was not possible to create multiple mail merges and save them as communications in the same workflow.	This issue is fixed. It is now possible to create multiple mail merges in the same workflow, and to save them as communications.
0-147773-QA	Mail Merge	When creating a document template, and using that document for a mail merge in 7.0, the document's table of content lost its functionality.	This issue could not be reproduced.
0-148698-QA	Mail Merge	It was not possible for several users to use a .DOC template at the same time for Mail Merge.	This issue is fixed. Please note that only one user at a time can edit HTML templates.
0-141185-QA	Mobile	Not able to customize area or country code on Person Entry Screen for iPhone.	This is by design.
0-148037-QA	Mobile	Blank screen displayed when running custom reports on mobile.	This issue could not be reproduced.
0-148255-QA	Mobile	On the iPad, clicking the Help (?) button within an Opportunity that had no communications disconnected the user.	This issue could not be reproduced.
0-148256-QA	Mobile	The Cancel button was not translated in French on the iPad.	This issue could not be reproduced.
0-146077-QA	Dashboard (Classic)	The Territorry Chart in the Classic Dashboard showed duplicated data following a CRM upgrade.	This issue is fixed.
0-144900-QA	Navigation	Recent companies were duplicated in the Recent list, with one entry linking to the Company Summary tab and the other to the Company Dashboard, even though the Company Dashboard had been made unavailable.	This issue could not be reproduced.
0-145959-QA	Notification	The Email reminder for an appointment was sent multiple times to only one user, instead of being sent once to all of the users assigned to the appointment.	This issue could not be reproduced.
0-145927-QA	Opportunities	An image folder was created in some installations of CRM with the Opportunity Pipeline enabled.	This issue is fixed.
0-143019-QA	Outlook Integ - Classic	It was not possible to search for an e-mail address containing a ' character.	This issue is fixed.

Ref ID	Area	Description	Status
0-147749-QA	Outlook Integ - Classic	When the Account entity was enabled, although hidden from the screens in CRM, removing the Company Name did not automatically remove the Person associated with it in the File E-mail screen.	This issue is fixed.
0-149057-QA	Outlook Integ - Exchange	Not able to install the Exchange plug-in when .NET 4.5 is installed.	This issue is fixed. Workaround is to uninstall .NET 4.5, install the Exchange Integration Plug-in, and then reinstall 4.5 (if required).
0-149720-QA	Outlook Integ - Exchange	E-mail filing with Outlook Exchange plug-in case-sensitive.	This issue is fixed.
0-149641-QA	Related Entities	Error in the Company Relationships tab.	This issue is fixed.
0-124509-QA	Reports	When changing a user's language, some captions were not always translated to the new language.	This issue is fixed.
0-137575-QA	Reports	Issue with creating custom Search Select Advanced fields for the Opportunity entity. If these fields had their Search Entity set to Company, then when creating a new Opportunity, the Company filed could not be updated or saved properly.	This issue is fixed.
0-143300-QA	Reports	Issues with Searching by Date (Relative - Week).	This issue is fixed.
0-143368-QA	Reports	Not able to run a Communication report searching for appointments made the previous week.	This issue is fixed.
0-143592-QA	Reports	In reports, clicking on key attribute data unchecked the Advanced Search box.	This issue is fixed.
0-144487-QA	Reports	It was not possible to export the contact list if the number of contacts was a multiple of 50.	This issue could not be reproduced.
0-145210-QA	Reports	In Reports, when the Legend option was checked, no diagram would show up on the report output.	This issue could not be reproduced.
0-146178-QA	Reports	If a field for seeing a company's full fax number was added to the Company view, it did not appear in Company Summary reports.	This issue is fixed.
0-146267-QA	Reports	Total sum in reports displayed more decimals than specified.	This issue is fixed.
0-146271-QA	Reports	Error with displaying special characters when exporting to CSV .	This issue could not be reproduced.
0-146815-QA	Reports	Duplicate cases shown in report output.	This issue could not be reproduced.
0-146884-QA	Reports	Special characters were not displaying correctly in reports.	This issue is fixed.

Ref ID	Area	Description	Status
0-147016-QA	Reports	Running an Activity Report about CRM users returned an SQL error.	This issue could not be reproduced.
0-147595-QA	Reports	Issue when sorting a Company report by Caption Order.	This issue is fixed.
0-147825-QA	Reports	Company reports did not return records about custom company fields with a Check Box Search.	This issue could not be reproduced.
0-148124-QA	Reports	Reporting on Person Last Name is "Empty" did not return any results.	This issue could not be reproduced.
0-148743-QA	Reports	Characters were not displayed correctly in Excel Communication report outputs, if the communication contained special characters pasted from MS Word.	This issue is fixed.
0-149060-QA	Reports	Not able to see appointments for the following week when running a report with the Relative Search option.	This issue is fixed.
0-146647-QA	GCRM Integration	Passwords containing the special character umlaut (¨) made the synchronization process fail.	This issue is fixed.
0-148777-QA	GCRM Integration	Error in Office Line integration.	This issue could not be reproduced.
426-147922-QA	GCRM Integration	Real Time Data Views not returning data as expected in X3 integration.	This issue is fixed.
505-148644-QA	GCRM Integration	E-mails not synching as expected in integration.	This issue is fixed.
0-143107-QA	Groups / Target Lists	Sending a Mail Merge document from a group created a duplicated letter for one of the users.	This issue is fixed. Also related to 0-130284-QA.
0-144644-QA	Groups / Target Lists	In Groups | New Task, not able to see available e-marketing campaigns when clicking on the Find icon.	This issue is fixed.
0-146007-QA	Groups / Target Lists	Field was missing from a custom view.	This issue could not be reproduced.
319-148539-QA	Security Management	There was a lack of cache control for form inputs in older web browsers.	This issue is fixed.
0-148387-QA	Translation (English prod)	The word "Won" (Korean money) was not correctly translated into French	This issue is fixed.
0-144411-QA	User Interface	When creating an Email template with a filled "From" field, the From field was not saved.	This issue is fixed.
0-144682-QA	User Interface	Adding a URL for a homepage in System behaviour created an icon for the URL. This icon did not respect the Theme.css.	This issue is fixed.
0-144942-QA	User Interface	A report title had not been translated into French and still appeared in English on French installs.	This issue is fixed.

Ref ID	Area	Description	Status
0-123014-QA	User Management	Custom translations were deleted when a territory was deleted from a security profile	This issue is fixed.
0-128868-QA	Web Services	The WebService was not behaving consistently, and this caused problems with the GetDropDownValues method.	This issue is fixed.
0-137490-QA	Web Services	Adding an e-mail to a person entity using Sage CRM 7.1 Web Services did not work.	This issue is fixed. The email type was not defined in the customer's application.
0-145316-QA	Workflow	The user had created a new rule with a Create Merge Document action in the Case Workflow. This worked fine when no template was attached, but failed if a template was attached.	This issue could not be reproduced.
0-147497-QA	Workflow	Not able to send an email to leads via workflow.	This issue could not be reproduced.
0-148108-QA	Workflow	Not able to edit a Workflow Rule Name from the Workflow Rule screen.	This is by design. Editing the rule name from the Workflow Rule screen changes the caption code, but not the translation. Users should go to Administration	Customisation	Translations and edit the code (i.e. the rule name) under the WorkflowRule family.

Rolled Up Fixes

Fixed cases for 7.0k and 7.1h are rolled up to this Release. Please refer to the 7.0 and 7.1 Patch Release Notes respectively for the full lists.

Known Issues

The following known issues exist with Sage CRM version 7.2.

Ref ID	Area	Description	Status
416-150851	Mobile	Tablet theme displayed on tablet device even though My CRM	Preferences	Tablet Theme is set to Desktop version.	This is a known issue to be fixed in a future patch. Workaround is go to **Administration**	**Advanced Customization**	**Devices**, select the link for **Tablet** and change the **Based on Device** setting. If your organization uses iPads, set the Based on Device field to **iPhone**. If your organization uses Android tablets, set the Based on Device field to **Android**.

Ref ID	Area	Description	Status
410-151128	Workflow	An error occurs when deleting a state in workflow.	This is a known issue to be fixed in a future patch. The workaround is to use the Delete button, rather than dragging and dropping the state onto the recycle bin.
52-151208	Documentation	Help link in Clone Report screen displays generic help link.	This is a known issue to be fixed in the next service pack. Help file does exist, workaround to navigate to it via the help table of contents.
550-151233	Reports	Charts not displayed on iPad when upgrading direct from 7.1 to 7.2.	This is a known issue to be fixed in a future patch. The workaround is to use the recommended upgrade procedure to 7.2 from either 7.1 SP1 or SP2.