Sage CRM

v7.1 Release Notes

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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.

Date of Release

March 2011

Version Numbers

Release Version:	7.1
DLL Version:	7.1.0.1
Doc Plugin:	7.1.0.1
Outlook Plugin:	7.1.0.1
CTI Plugin:	7.1.0.1

Documentation

The following documentation is available with this release:

Description	Version Code
PDF Documentation	
What's New Guide	SYS-REL-ENG-710-1.0
Quick Start Guide	USE-QSG-ENG-710-1.0
User Guide	USE-MAN-ENG-710-1.0
System Administrator Guide	SYS-MAN-ENG-710-1.0
Developer Guide	DEV-MAN-ENG-710-1.0
Self Service Guide	IMP-SEL-ENG-710-1.0
Wireless Mobile Guide	IMP-WMG-ENG-710-1.0
Installation and Upgrade Guide	IMP-UPG-ENG-710-1.0
Product Support Matrix	IMP-MAT-ENG-710-1.0
Help	
Context Sensitive User Help *In-product help available from the Help button in the Main Menu area. Also available on the Sage CRM Ecosystem web site* *https://www.sagecrm.com/userhelp*	USE-HLP-ENG-710-1.0
Context Sensitive System Admin Help *In-product help available from the Help button in the Administration area. Also available on the Sage CRM Ecosystem web site* *https://www.sagecrm.com/adminhelp/*	SYS-HLP-ENG-710-1.0
Developer Help *Available on the Sage CRM Ecosystem web site* *https:/www.sagecrm.com/developerhelp*	DEV-MAN-ENG-710-1.0
Product Videos *Product videos are available on the User and Administrator Welcome dashboards (My CRM | Dashboard).*	
Preparing for Data Upload	UPR-VID-ENG-710-1.0
Performing a Data Upload	UPE-VID-ENG-710-1.0
Getting Started with the Interactive Dashboard	IDB-VID-ENG-710-1.0
Getting Started with E-marketing	EMA-VID-ENG-710-1.0
Getting Started with Exchange Integration	OEX-VID-ENG-710-1.0

The CTI Guide and all of the above release documentation are available on the Sage CRM Ecosystem web site:

http://community.sagecrm.com/user_community/m/sage_crm_v71/default.aspx

Known Issues

The following known issues exist in Sage CRM version 7.1 and are in the process of being resolved.

Ref ID	Area	Description	Status
475-132738	Core Product	On upgrade to version 7.1, the version 7.0 My CRM | Welcome tab is visible.	This is a known issue. A suggested workaround to hide the Welcome tab is to click the ellipsis icon at the end of the row of tabs and deselect the Welcome check box. Version 7.1 content similar to the version 7.0 content on the Welcome tab is available on the new Welcome Dashboards.
329-132235	Customization	An error message was displayed when the ssCaselist in Administration | Customization | Lists | Cases was opened for editing, and then saved without making any changes.	This is a known issue.
255-131518	Dashboard (Interactive)	When a demo Sales Dashboard was assigned to the demo user Brian Little, an error message was displayed on gadgets using Report data sources.	This is by design. Users must be given access to Enterprise Reports (in Administration | Users) to be able to view data on gadgets based on Report data sources.
328-128404	Dashboard (Interactive)	Changes to the gadget layout, e.g. hiding and rearranging some columns, were reset after editing the gadget without making any changes.	This is a known issue.
328-129324	Dashboard (Interactive)	The CEO demo dashboard is not displaying opportunity data for a non-admin user with full opportunity rights.	This is a known issue.

Ref ID	Area	Description	Status
512-132183	Dashboard (Interactive)	Clicking on the workflow anchor button on a cases list gadget displayed the workflow actions list, however when there were a large number of workflow actions, the lower actions could not be seen or selected in the Actions dialog.	This is a known issue. Workaround is to select the Default Action, Go To Summary Screen, in Step 4 of the list gadget wizard. This gives the user an alternative navigation to the full workflow actions list on the Summary page.
522-131678	Dashboard (Interactive)	An error occurred when trying to input proxy settings without a domain name, even though the proxy server being used did not require the domain name.	This is a known issue. Proxy Domain should not be a required field. It should be possible to change the proxy settings even if the Proxy Domain field is empty.
332-131898	Document Plugin	After deleting the document plug-in, the VeriSign certificate could not be verified on Windows Server 2008 when trying to re-install the plug-in.	This is a known issue with the document plug-in and other plug-ins. To work around this issue, you can change your IE security settings to allow unsigned ActiveX controls. You should check with your System Administrator before doing this, however, as it may present a security risk.
332-132055	E-mail Manager	An error occurred when the E-mail Manager service attempted to connect to the E-mail Manager mailbox, under Office 2010 64-bit.	This is a known issue. E-mail Manager does not work under Office 2010 64-bit.
475-123747	E-Marketing	It was not possible to save an E-marketing e-mail Wave Activity when trying to associate an empty dynamic group to it.	This is a known issue.

Ref ID	Area	Description	Status
475-127951	E-Marketing	The SwiftPage nightly sync returns the data since the previous synchronization. If the synchronization failed due to, for example, a network error, the next synchronization returns the data from the last 24-hrs - not the last successful synchronization. This means that if the synchronization is interrupted or fails for some reason, some "click" results from that specific 24-hr period may not be present in CRM.	This is a known issue.
475-129856	E-Marketing	An error occurred when sending large E-marketing e-mail blasts at the same time that the nightly synchronization was occurring.	This is a known issue. Suggested workaround is to not carry out large E-marketing e-mail blasts at the same time that the synchronization is running - and/or ensure that the synchronization time is not taking place during the time when large blasts are likely to go out. Please refer to the System Administrator Guide for details on changing the CRM synchronization time.
491-131127	E-Marketing	It was not possible to send an E-marketing e-mail to a group containing Key Attribute Data (KAD).	This is a known issue. Groups with KAD are currently not supported in E-marketing.
519-127085	E-Marketing	A campaign containing both E-marketing and non E-marketing wave activities was still available after the E-marketing account was cancelled, but the Communications tab was missing.	This is a known issue.
519-131002	E-Marketing	Bounced e-mails are not showing in a newly created E-marketing account after cancelling the original E-marketing account from which the e-mails were sent.	This is a known issue.

Ref ID	Area	Description	Status
255-130198	Exchange Integration	It was not possible to create an Exchange Integration using an EC/2 account and Hosted Exchange 2010.	This is a known issue with authentication. Some third-party Exchange providers do not allow Anonymous Authentication to be enabled.
332-131776	Exchange Integration	Syncing a large number of items is taking longer than expected. For example, syncing 300,000 appointments and 450,000 tasks from Exchange to CRM should take around 162 hours, but took 384 hours.	This is a known issue. Exchange sync times are increasing exponentially rather than in a linear fashion. We plan to change it so that they increase linearly.
463-130575	Exchange Integration	Table Level Scripts and Entity Level Scripts on the following tables are not triggered as a result of a sync from Exchange to CRM: Communication, Comm_Link, Comm_LinkStub, Recurrence, Person, Address, Address_Link, Phone, Phone_Link, Email, Email_Link.	This is a known issue.
261-133092	Exchange Integration	If the Active Directory Group Policy has been used to roll out the Outlook Plug-in for Exchange to a Windows 64-bit machine running Office 64-bit, then the plug-in was not loading when Outlook was launched.	This is a known issue. There is a workaround - this is documented in the "More Notes on this Release" section of this document.
519-132274	Library and Templates	An error occurred when trying to edit and save an Excel document in the Shared Documents tab.	This is a known issue.
329-131616	Reports	Group By values in report charts are not displaying the localized language.	This is a known issue.

Ref ID	Area	Description	Status
518-132593	Timings	Drop-down list items were displayed in the Business Calendar drop-down when editing a Service Level Agreement, which were not business calendars. If one of these drop-down items was then selected as the default business calendar, and a new SLA was created, an error occurred.	This is a known issue caused by two sets of translations using the same Caption Family. Workaround is to ensure that the correct business calendar, rather than one of the non-business calendar translations, is selected when setting a default business calendar.

Supplementary Information for Documentation

The following cases provide supplementary information to the Documentation and Help shipped with Sage CRM version 7.1.

Ref ID	Area	Description	Status
475-132540	Database	It is recommended that when installing Sage CRM, a dedicated SQL Server user for CRM should be used (i.e. not the "sa" user). Alternatively, ensure there is a back-up user with the same privileges as "sa" in SQL Server. Both of these measures will prevent access issues if the "sa" user gets locked out of CRM.	This information will be added to the Sage CRM v7.1 Installation and Upgrade Guide at the next update of the Guide.
52-117778	Documentation	The description for Crystal Reports Viewer Path (in Administration | E-mail and Documents | Documents and Reports Configuration) should be updated to read: "Location of virtual directory in IIS required for Crystal Viewer support."	This information will be updated in the Sage CRM v7.1 System Administrator Guide at the next update of the guide.
52-132594	Documentation	The Classic Outlook Hide CRM View toolbar button is no longer available, however a description of it appears in the User Guide/Help.	This information will be removed from the Sage CRM v7.1 User Guide at the next update of the guide.
52-133142	Documentation	Additional note for Outlook Plug-in Installer Parameter, SCRMOFFICEVERSION: If the plug-in is being deployed via Group Policy to a machine(s) running Outlook 2007, then it is strongly recommended that the SCRMOFFICEVERSION value is always set to 12. For example, if the plug-in is being deployed to Outlook 2010 and Outlook 2007 machines then two separate MSI files should be prepared and deployed. One for the Outlook 2010 machines (with either auto or 14 specified for SCRMOFFICEVERSION) and one for the Outlook 2007 machines (where SCRMOFFICEVERSION = 12).	This information will be updated in the Sage CRM v7.1 System Administrator Guide at the next update of the guide.

Ref ID	Area	Description	Status
		Failure to do this may result in the plug-in not loading when Outlook 2007 is launched.	
428-132492	E-Marketing	The CRM User, selected when setting up a new E-marketing user, must have at least Info Manager E-mail and Templates rights (or full Administrator rights) to work with E-marketing.	This information will be added to the Sage CRM v7.1 System Administrator Guide at the next update of the Guide.

More Notes on this Release

The following notes provide supplementary information to the Documentation and Help shipped with Sage CRM version 7.1.

Initial Exchange Synchronization Completion Time

It is expected that an initial sync of **30 user mailboxes**, for a reasonably large volume of data (see below), where appointments, tasks and contacts are set to sync bi-directionally, should take approximately **2.5 hours** to complete.

This is based on the following initial sync data volumes spread across those 30 users:

- 6000 appointments/occurrences syncing from Exchange to CRM
- 9000 tasks syncing from Exchange to CRM
- 6000 appointments/occurrences syncing from CRM to Exchange
- 9000 tasks syncing from CRM to Exchange
- 15000 contacts syncing from CRM to Exchange

This is a large volume of data to synchronize (for the number of users involved in the sync) as it assumes that each user has approximately:

- 10 appointments **per day** for the previous two weeks and 10 appointments per day for two weeks into the future – in both Exchange and CRM*
- 15 tasks **per day** for the previous two weeks and 15 tasks per day for two weeks into the future – in both Exchange and CRM**
- 500 **unique** contacts per user in CRM

This **2.5 hours** initial sync completion time for the volumes/users above was observed during performance testing, on a clean install of Sage CRM 7.1 pre-loaded with the data volumes above, where the Exchange Server and CRM Server were running in a **virtualized environment** with the following hardware specifications:

	CRM Server	Exchange/Active Directory Servers
Operating System	MS Windows Server 2008 R2	Windows Server 2008
Database	MS SQL Server 2008 R2	n/a
CPU	1x Intel Xeon CPU X5660 @2.80GHz	1x Intel Xeon CPU X5660 @2.80GHz
RAM	4 GB	4 GB
HDD	2 x 40 GB	150 GB

* As outlined in the overview section above, appointments with an end date at any point in the future will always be synchronized, but for the purposes of this performance test it has been assumed that only two weeks-worth of future appointments have been created for each user.

** As outlined in the overview section above, tasks that have been created/modified in the 14 days prior to the time the sync started will be synchronized. For the purposes of this performance test, however, it has been assumed that the only tasks that have been created/modified in the last 14 days were those that are present for each user for the past two weeks and two weeks into the future (from the time the sync was started).

Upgrade Times

Due to the changes to the structure of the phone and e-mail tables that occur during an upgrade, the upgrade may take longer than expected, depending on the size of the database and the number of company and person records.

In order to calculate downtime, it is recommended that a full upgrade be run in a test environment prior to implementation in a live environment.

For more information on the changes to the phone and e-mail tables and the recommended procedure for performing an upgrade, please refer to the *Installation and Upgrade Guide*.

Rolling out the Outlook Plug-in for Exchange Integration via Active Directory Group Policy – Windows 64-bit/Office 64-bit

Known issue **261-133092**. The workaround is as follows:

1. The System/Network Administrator should roll the plug-in out to the 64-bit office machines as normal, and then export the following registry key from one of these machines:

   HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\Outlook\Addins\SageCrmOutlookAddIn2010ForExchange

   The contents of this registry key are as follows:

   ```
   Windows Registry Editor Version 5.00
   [HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\Outlook
   \Addins\SageCrmOutlookAddIn2010ForExchange]
   "Manifest"="C:\\Program Files (x86)\\Sage\\CRM
   Client\\OutlookPluginForExchange\\SageCRMOutlookExchangePlugin.vs
   to|vstolocal"
   "ManifestName"="SageCRMOutlookExchangePlugin.dll.manifest"
   "FriendlyName"="Sage CRM Outlook 2010 AddIn for Exchange"
   "LoadBehavior"=dword:00000003
   "CommandLineSafe"=dword:00000001
   "Description"="Sage CRM Outlook 2010 Addin for Exchange"
   "ManifestLocation"="C:\\Program Files (x86)\\Sage\\CRM
   Client\\OutlookPluginForExchange\\"
   ```

2. This exported key should be modified by changing the following line:

   ```
   [HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\Outlook
   \Addins\SageCrmOutlookAddIn2010ForExchange]
   ```

   to

   ```
   [HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Outlook\Addins\Sage
   CrmOutlookAddIn2010ForExchange]
   ```

In other words, remove the **Wow6432Node** from the second line of the registry file.

3. This modified registry key should then be rolled out to the 64-bit Office machines via group policy.

   The registry key will then exist in a location that the 64-bit Outlook application can locate it.

Upgrades with Solo

Solo functionality will not be supported until 7.1SP1, so it is not possible for customers with Solo to perform an upgrade to version 7.1. It is recommended that such customers do not upgrade until 7.1SP1 is released.