

# 2023 R2.4 Patch ReadMe

**Updated:** 21 March 2025

This patch is applicable to Sage CRM 2023 R1 and 2023 R2.

## Addressed issues

Internal issue ID	External issue ID	Area	Description	Status
CRM-2499	CRMS-1709	Exchange Integration	Microsoft's removal of the Application Impersonation Role disabled the integration between Sage CRM and Exchange Online	<p>This patch enables users to synchronize appointments only</p> <p>Synchronization of tasks will be enabled in a subsequent release</p> <p>Import Contacts and Emails replaces the previous contact synchronization feature</p>

**Note:** This patch is applicable to Sage CRM integrated with Exchange Online only. Integrations with on-premises Exchange Server are not affected by the deprecation of Application Impersonation.

# Steps to apply this patch

1. On your Sage CRM server, run the provided **SageCRM2023R2.4.exe** file.
2. Complete the Setup Wizard.

# Steps to complete after applying this patch

Create an OAuth 2.0 client ID and secret to access Exchange Online

- Follow the instructions on [Getting OAuth 2.0 client ID and secret for Entra ID](#)
- Grant the following **Microsoft Graph API** permissions:

<b>Area</b>	<b>Type</b>
Application.Read.All	Application
Application.ReadWrite.All	
Application.ReadWrite.OwnedBy	
Calendars.Read	
Calendars.ReadBasic.All	
Calendars.ReadWrite	
Contacts.Read	
Contacts.ReadWrite	

Area	Type
Application.Read.All	Delegated
Application.ReadWrite.All	
Calendars.Read	
Calendars.Read.Shared	
Calendars.ReadBasic	
Calendars.ReadWrite	
Calendars.ReadWrite.Shared	
CallEvents.Read	
Contacts.Read	
Contacts.Read.Shared	
Contacts.ReadWrite	
Contacts.ReadWrite.Shared	
Directory.ReadWrite.All	
EWS.AccessAsUser.All	
IMAP.AccessAsUser.All	
Mail.ReadBasic	
Mail.ReadBasic.Shared	
Mail.Read	
Mail.Read.Shared	
MailboxFolder.Read	
MailboxFolder.ReadWrite	
MailboxItem.ImportExport	
MailboxItem.Read	
MailboxSettings.Read	
MailboxSettings.ReadWrite	
offline_access	
OnPremDirectorySynchronization.ReadWrite.All	
openid	
Organization.Read.All	
People.Read	
People.Read.All	
POP.AccessAsUser.All	
profile	
SMTP.Send	
Synchronization.Read.All	
SynchronizationData-User.Upload	
Tasks.Read	
Tasks.Read.Shared	
Tasks.ReadWrite	
Tasks.ReadWrite.Shared	
User.Read	
User.Read.All	

- Grant the following **Office 365 Exchange Online** permissions:

<b>Area</b>	<b>Type</b>
EAS.AccessAsUser.All email	Delegated
EWS.AccessAsUser.All Tasks.Read Tasks.Read.Shared Tasks.ReadWrite Tasks.ReadWrite.Shared	

## Create a connection from Sage CRM to Exchange

1. Login to Sage CRM as a System Administrator
2. Go to **<My Profile> | Administration | System | System Behavior**
3. Click **Change**
4. Select **Yes** for **Use Exchange Integration**
5. Click **Save**
6. Go to **<My Profile> | Administration | Email and Documents | OAuth 2.0 Settings for Importing Contacts and Emails**
7. Click **Change**
8. Enter the **OAuth 2.0 client ID** and **Client secret value** you obtained in *Getting OAuth 2.0 client ID and secret for Entra ID*
9. Click **Save**
10. Go to **<My Profile> | Administration | Email and Documents | Exchange Integration | Connection Management**
11. Click **New**

12. Complete the **Exchange Connection Settings**:
  - a. For **Exchange type**, select **Exchange Online (Office 365)**
  - b. For **Exchange Web Service URL**, enter `https://outlook.office365.com/EWS/Exchange.asmx`
  - c. For **Application (client) ID**, enter the **OAuth 2.0 client ID** you obtained in *Getting OAuth 2.0 client ID and secret for Entra ID*
  - d. For **CRM user name**, enter a Sage CRM user with system administrator rights
13. Click **Save**
14. Click **Continue**

## Enable user mailboxes for synchronization

1. On **<My Profile> | Administration | Email and Documents | Exchange Integration | Connection Management**, select the **User Mailbox Management** tab. A list of Sage CRM users is displayed
2. Click **Change**

*This button is displayed only if the synchronization process is disabled.*
3. Select the **Synchronize** checkbox beside the user mailboxes that you want to synchronize with Exchange

*We strongly recommend that you enable all Sage CRM users for Exchange synchronization to ensure a seamless integration.*
4. Click **Save**
5. Click **Continue**

## Enable Exchange synchronization

1. Go to **<My Profile> | Administration | Email and Documents | Exchange Integration | Synchronization Management**
2. Click **Change**
3. Select **Yes** for **Sync Appointments**

4. Click **Save**
5. Click **Enable**. The synchronization status changes to **In Progress**

Instruct Sage CRM users to connect to their Exchange Online accounts

Every Sage CRM user must do the following:

1. Go to **<My Profile> | Preferences**
2. Select **Connect to Email Account** or **Switch Email Account**
3. Enter the email account details when prompted and validate if required
4. Click **Continue**
5. Select the **Contacts** tab to confirm the connection
6. Select **Import Contacts** and select the contact(s) you want to import into Sage CRM

**Warning:** Editing appointments that were synchronized prior to the upgrade may lead to unexpected results.