



Sage CRM 2025 R1 Release Notes

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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 2025 R1 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 2025 R1 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.

Release date and files included

Release date	eWare.dll version
June 2025	20.25.0.1

Documentation and help

To view context-sensitive help, click the **Help** button in Sage CRM 2025 R1.

For more information about the software with which Sage CRM 2025 R1 can work and integrate, see the *2025 R1 Hardware and Software Requirements* 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](#).

Note: Translated help and guides have been discontinued. Only English documentation is now supplied with Sage CRM.

Installing and upgrading

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.

- [Installation prerequisites](#)
- [Upgrade path](#)
- [Post-installation/upgrade tasks](#)
- [Supported themes](#)

Installation prerequisites

Before installing or upgrading Sage CRM, make sure that:

- Your environment meets the *Sage CRM 2025 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).
- You have *Microsoft OLE DB Driver for SQL Server* installed on the SQL Server that will be hosting the Sage CRM database.

[Download Microsoft OLE DB Driver for SQL Server](#)

You need to install driver version 18 or later. If you don't have this driver installed, the Sage CRM Setup cannot connect to the SQL Server.

Note: If you make Sage CRM available outside your corporate network, consult your Sage business partner about protecting your data, enable Secure Socket Layer (SSL) and make sure that users connect to Sage CRM via a Virtual Private Network (VPN).

Upgrade path

You can use the Sage CRM 2025 R1 installation package to upgrade from versions 2024 R2, 2024 R1, 2023 R2, 2023 R1, 2022 R2, 2022 R1.

To upgrade from an earlier version of Sage CRM, please first upgrade to one of the versions listed here.

Consider the following:


- Computer telephony integration (CTI) has been removed from Sage CRM and is no longer supported. If you have CTI installed in a previous Sage CRM version, upgrading to 2025 R1 completely removes CTI.
- The **File extension restrictions** blocklist was discontinued in Sage CRM 2023 R1. If you are upgrading from a pre-2023 R1 version, the Sage CRM Setup does not transfer the file name extensions from **File extension restrictions** to Sage CRM 2025 R1. You need to transfer these restrictions manually.

Post-installation/upgrade tasks

- Sage CRM Setup cannot upgrade Microsoft SQL Server Express installed with a previous Sage CRM version. As a result, you may end up with Sage CRM using an unsupported Microsoft SQL Server Express version. If necessary, manually upgrade Microsoft SQL Server Express after upgrading Sage CRM.

For supported Microsoft SQL Server Express versions, see *Sage CRM 2025 R1 Hardware and Software Requirements* published on the [Sage CRM Help Center](#).

- Sage CRM 2025 R1 makes changes to the automatically added Mailchimp merge tags. If you have Mailchimp Integration enabled, after upgrading Sage CRM you may need to perform some manual actions. For details, see [Changes to Mailchimp merge tags](#).
- Make sure that user passwords in Sage CRM are not blank. We test Sage CRM features in an environment where every user has a nonblank password assigned. If you have blank user passwords in your environment, Sage CRM features may behave unpredictably.
- 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.
- Clear the Web browser cache on each user's computer to ensure the Interactive Dashboard works correctly

- Re-enter the Sage CRM system administrator password after you have upgraded Sage CRM that is integrated with another system. This is required to hash and securely store the password.
 - a. Log on to Sage CRM as a system administrator.
 - b. Go to  | **Administration | Integration | Integration List** and click the integration for which you want to re-enter the password.
 - c. Select **Disable** and then select **Continue**.
 - d. Select **Change**.
 - e. In the **CRM Password** text box, re-enter the password.
 - f. Select **Save**.
 - g. Select **Enable**.

Note: You must re-enter the Sage CRM system administrator password using the steps above whenever you modify your integration.

Supported themes

The only supported Sage CRM theme is Contemporary.

We recommend that after installing or upgrading Sage CRM system administrators make sure that the Contemporary theme is set as the default theme.

For details, see *Changing the default theme* in the *Sage CRM 2025 R1 System Administrator Help* published on the [Sage CRM Help Center](#).

New features and enhancements

Sage CRM 2025 R1 provides the following new features and enhancements:

- **Modernization of Exchange Online Integration**

Modernization of Exchange Online Integration

Feature ID: CRMS-1709, CRMS-1959, CRMS-1962

Microsoft's removal of the Application Impersonation Role disabled the integration between Sage CRM and Exchange Online.

Note:

It is essential that you follow all the steps below after installation to enable or re-enable Exchange Online Integration

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:

Area	Type
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:

Area	Type
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. Log out of their Microsoft Exchange account
2. Clear the browser cache completely
3. Login to Sage CRM
4. Go to **<My Profile> | Preferences**
5. Select **Connect to Email Account** or **Switch Email Account**
6. Enter the email account details when prompted and validate if required
7. Click **Continue**
8. Select the **Contacts** tab to confirm the connection
9. Select **Import Contacts** and select the contact(s) you want to import into Sage CRM

Addressed issues

The following is a list of customer cases addressed in this release.

Issue ID	Area	Description	Status
CRMS-945	Calendar, Calendar List	When a user created a Date/time filter on the Calendar List, then opened one of the tasks returned by the filter, changed the status of the task to Complete, and clicked Save, a blank screen was displayed and the user had to clear the browser cache to return to the Calendar List	Fixed
CRMS-1882, CRMS-1977	Communications	When a user attached a file to Communications, the following error appeared in ewaresystem.log: "SQLException : Incorrect syntax near '='"	Fixed
CRMS-1090	Component management	When a user filtered the records for a custom entity, a "500 - Internal server error" page was returned	Fixed
CRMS-531	Customisation	It was impossible to use the same Relationship Name for two entities, even when the Relationship Type was Sibling	Fixed
CRMS-1773	Customisation	When a system administrator had added fields, e.g. Type or Status, to the Library Web Picker screen, an UnexpectedEvent error occurred when they attempted to attach a file	Fixed

Issue ID	Area	Description	Status
CRMS-1015	Dashboard	The icons on a Main Menu Item or Summary gadget were displayed in a single vertical column, regardless of the size of the gadget	Fixed The icons are rearranged automatically as the gadget is resized
CRMS-1469	Dashboard	Users without system administrator rights could not view some dashboard gadgets: "An error occurred when attempting to process the Gadget. Please contact your System Administrator."	Fixed
CRMS-1948	Email management	Email management stopped working after 90 days and the following error was displayed: "error_description":"AADSTS700082: The refresh token has expired due to inactivity"	Fixed
CRMS-678	Exchange integration	When a user created an all day event in Sage CRM, and the appointment was synchronized to Microsoft Exchange Online, it was displayed as a three day appointment	Fixed
CRMS-1049	Exchange integration	Exchange integration failed at midnight every night	Fixed
CRMS-2039	Exchange integration	When an appointment was synchronised between Sage CRM and Exchange Online, the time of the appointment was incorrect: an hour earlier than the original appointment	Fixed

Issue ID	Area	Description	Status
CRMS-2042	Exchange integration	When a 30-minute appointment was synchronised from Exchange Online to Sage CRM, the appointment in Sage CRM lasted for several hours	Fixed
CRMS-2055	Exchange integration	When an appointment was synchronised from Exchange Online to Sage CRM, the start time in Sage CRM was the same as the end time	Fixed
CRMS-2056	Exchange integration	When an appointment was synchronised from Exchange Online to Sage CRM, the start time in Sage CRM was an hour later than the end time	Fixed
CRMS-2060	Exchange integration	Some users were unable to synchronize appointments because their Auth Tokens had expired and not been refreshed	Fixed
CRMS-2102	Exchange integration	When Exchange synchronization was enabled, appointments dated in the past were not synchronized between Sage CRM and Exchange Online. If those appointments had been created in Sage CRM they were also deleted from Sage CRM	Fixed
CRMS-2010	Import contacts and emails	When an email with an attachment was imported into Sage CRM, the attachment was not imported if the file extension was in upper case	Fixed

Issue ID	Area	Description	Status
CRMS-1171	Mail merge	When a system administrator changed the value of Default document templates location for mail merge, then selected a Document Template and clicked View Attachment, the following Server Error was displayed: "404 - File or directory not found. The resource you are looking for might have been removed, had its name changed, or is temporarily unavailable."	Fixed
CRMS-1942	Mail merge	If a user's password contained a pound sign (£), they were unable to perform a mail merge. When they selected Merge and Continue, the following error was displayed: "Mail Merge failed. Please contact your System Administrator"	Documentation updated User passwords may not contain any non-alphanumeric characters other than ` ! \$ % ^ & * () _ - + [] { } ; : ' @ # ~ \ , . < > / ?
CRMS-1964	Mail merge	If a user selected Use quote format for merge document name, then selected Merge to PDF for a quote, but did not select Create Communication, the hyperlink for that PDF under the Documents tab didn't work because the filename didn't exist	Fixed
CRMS-1967	Security management	The following security vulnerabilities affected the version of Apache Tomcat supplied with Sage CRM: CVE-2024-56337 CVE-2025-24813	Fixed Tomcat has been updated to version 9.0.102, where these vulnerabilities are addressed

Issue ID	Area	Description	Status
CRMS-2079	Security management	SQL injection was possible by manipulating the Sage CRM URL	Fixed
CRMS-1887	Security management, Self Service	Self Service credentials were visible in clear text on the browser console	Fixed The password is now encrypted. See <i>Securing Sage CRM Self Service – A Guide</i> for more information
CRMS-1182	User interface	When a user edited a multi-line text field on Mozilla Firefox, line breaks were displayed as spaces	Fixed
CRMS-1211	User interface	When a user edited a multi-line text field, the text did not wrap; instead, a horizontal scrollbar was added to the bottom of the text field	Fixed
CRMS-1760	User interface	The Import Emails button has been moved from the Summary to the Communications tab for Company, Person, Case, and Opportunity	Implemented
CRMS-1927	Users/groups	After installing Sage CRM without demo data, if a user created one or two companies, created a dynamic group based on the Company entity, and then attempted to export to a file or create a new task or email from that group, the following error was displayed when the communication was created: "An unexpected event has occurred: EAccessViolation"	Fixed

Issue ID	Area	Description	Status
CRMS-1937	Users/groups	After installing Sage CRM without demo data, if a user created a dynamic group based on the Person entity, and then attempted to send an email from that group, the following error was displayed: "Emails cannot be sent as the records in this list are either not associated with a company or person or the associated record has no email address"	Fixed
CRMS-1373	Web services	When IIS auto login was enabled, and a web service test was run to query a Company record repeatedly, an "Access violation" error was displayed on the console after several thousand successful queries	Fixed

Known issues and limitations

The following issues and limitations are known to exist in Sage CRM 2025 R1 at the time of release.

Issue ID	Area	Description
CRMS-450, CRMS-595	Email	<p>When you right-click a highlighted misspelled word in the built-in email editor, the shortcut menu that opens does not provide a list of suggestions to correct the word. This issue occurs in the Google Chrome, Microsoft Edge, and Mozilla Firefox web browsers and is caused by a third-party component called CKEditor.</p> <p>WORKAROUND 1</p> <p>Hold down Ctrl and right-click the misspelled word to display a list of suggestions.</p> <p>WORKAROUND 2</p> <p>Install and use a spellchecker extension for your web browser such as LanguageTool.</p>
CRMS-714	Email	<p>When you use the built-in email editor to insert an inline image into the email body by selecting Paste in a shortcut menu, a message appears stating that your web browser does not support this functionality and that you should use the Ctrl+V keys instead. But pressing the Ctrl+V keys also fails to insert the image.</p> <p>WORKAROUND</p> <p>Below the email editor box, browse for and select a local image file. Select Upload inline image.</p>

Issue ID	Area	Description
N/A	RESTful API	<p>When using the RESTful API, you may observe the following issues.</p> <p>Issue 1: Even though your request sent to the RESTful API uses the HTTPS protocol, the URLs of records returned by the API use HTTP.</p> <p>Issue 2: The base URL of the records returned by the API may be different from the one you used in your request. For example, the base URL in your request may contain the fully qualified domain name (FQDN) of the Sage CRM server but the base URL of the returned records has the local server name instead.</p> <p>REASON</p> <p>Issue 1: This is by design. The RESTful API always uses HTTP in the URLs of returned records.</p> <p>Issue 2: To form the URLs of returned records, the RESTful API uses the server name stored the <code>Parm_Value</code> column of the <code>Custom_SysParams</code> database table. However, this column can store several names for your Sage CRM server, for example, its local name and FQDN separated by a semicolon:</p> <pre>myserver;myservername.mydomain.com</pre> <p>The RESTful API always uses the first server name stored in this column.</p> <p>WORKAROUND FOR ISSUE 2</p> <p>Change the order of the server names stored in the <code>Parm_Value</code> column of the Sage CRM database, so that the FQDN of your server comes first.</p> <ol style="list-style-type: none"> 1. See the server names stored in the <code>Parm_Value</code> column: <pre>SELECT Parm_Value from Custom_SysParams where Parm_Name='ServerNames'</pre> 2. Back up the Sage CRM database. 3. Run a SQL query to change the order of the server names, for example: <pre>UPDATE Custom_SysParams SET Parm_Value = 'myservername.mydomain.com;myserver' WHERE Parm_Name = 'ServerNames'</pre>

Issue ID	Area	Description
CRMS-1630	RESTful API	<p data-bbox="570 226 1451 254">RESTful API performance may be slow because of the below issue.</p> <p data-bbox="570 289 1325 499">Any API call sent to <code>http://{server name or IP}/sdata/{installName}j/sagecrm2/-/{resource}</code> is redirected by IIS to <code>http://localhost:{port number}/{installName}j/sagecrm2/-/{resource}</code>.</p> <p data-bbox="570 531 1451 636">As a result, the response from the RESTful API contains a JSESSIONID cookie with the incorrect path: <code>Path={installName}j</code> instead of <code>Path=/sdata/{installName}j</code></p> <p data-bbox="570 667 1451 772">Because of the incorrect path, the browser does not register the cookie. This causes Sage CRM to create a new session with a new JSESSIONID cookie.</p> <p data-bbox="570 804 756 831">WORKAROUND</p> <p data-bbox="570 863 1435 968">Create an outbound rewrite rule in IIS to change the cookie path in responses from <code>Path={installName}j</code> to <code>Path=/sdata/{installName}j</code>.</p> <p data-bbox="570 999 688 1026">Example:</p> <pre data-bbox="570 1058 1451 1472" style="border: 1px solid #ccc; padding: 10px;"> <outboundRules> ... <rule name="Change Set-Cookie crmj HTTP" enabled="true"> <match serverVariable="RESPONSE_Set-Cookie" pattern="^JSESSIONID=([^;]+); Path=\/crmj;" /> <action type="Rewrite" value="JSESSIONID={R:1}; Path=/sdata/crmj; HttpOnly;" /> <conditions> <add input="{SERVER_PORT_SECURE}" pattern="0" /> </conditions> </rule> ... </outboundRules> </pre> <p data-bbox="570 1503 1143 1530">This example uses <code>crm</code> as the install name.</p> <p data-bbox="570 1562 1422 1633">For more information, see Creating Outbound Rules for URL Rewrite Module in the Microsoft documentation.</p>

Issue ID	Area	Description
CRMS-430	RESTful API, SData	<p>In Postman, when you use wildcard characters (%) in a GET request to return specific records, you receive unexpected results.</p> <p>For example, the following request returns all companies instead of just the companies whose name contains <i>Gate</i>:</p> <pre data-bbox="570 426 1308 485">GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%Gate%'</pre> <p>This issue is caused by the way Postman processes certain characters. In the past, Postman provided a setting named Use next generation URL processing. By disabling this setting, you could make the wildcard characters work. However, this setting has been discontinued in the recent Postman releases.</p> <p>WORKAROUND 1</p> <p>Use URL encoding (%25) to encode the wildcard characters (%) in your request, for example:</p> <pre data-bbox="570 890 1308 949">GET http://SageCrmServer/sdata/crmj/sagecrm2/-/Company?where=comp_name like '%25Gate%25'</pre> <p>WORKAROUND 2</p> <p>Use an alternative client to test the RESTful API, such as SoapUI or ReadyAPI.</p>
N/A	Tags	<p>When you select the cross icon (x) on a tag to remove it from a record, in some browsers the tag name may disappear from the list before you confirm its removal in the dialog that opens.</p> <p>WORKAROUND</p> <p>Ignore this behavior. A tag is not removed until you confirm its removal.</p>
CRMS-151	User interface	<p>When the Details field of an entity contains a long value (255+ characters) without spaces, line breaks, or dashes, the value isn't wrapped to fit in the field. For example, this issue occurs in the Lead_detail field. This limitation is by design and will not be fixed.</p> <p>WORKAROUND</p> <p>You can fit a long value in the field by displaying only the first 255 characters of the value. To do so, put the Details field in a List block. This doesn't change the actual value stored in the SQL Server database.</p>

Open-source components

Sage CRM 2025 R1 installs the following open-source components:

Component	Legal information
Apache FOP 2.9	© 2024 The Apache Software Foundation Apache License, Version 2.0 https://www.apache.org/licenses/LICENSE-2.0 Source code: https://github.com/apache/xmlgraphics-fop/releases/tag/2_9
Apache Solr 8.11.3	© 2025 The Apache Software Foundation Apache License, Version 2.0 https://www.apache.org/licenses/LICENSE-2.0 . Source code: https://archive.apache.org/dist/lucene/solr/8.11.3/
Apache Tomcat 9.0	© 2025 The Apache Software Foundation Apache License, Version 2.0 https://www.apache.org/licenses/LICENSE-2.0 . Source code: https://tomcat.apache.org/download-90.cgi
Eclipse Temurin Java Runtime Environment 8 based upon OpenJDK	© Eclipse Foundation GNU General Public License, version 2 https://www.gnu.org/licenses/old-licenses/gpl-2.0.en.html Source code: https://adoptium.net/en-GB/temurin/releases/?os=windows&arch=x86&package=jre&version=8