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About this guide

This guide is for Sage CRM system administrators who need to troubleshoot issues with Sage CRM. The navigation instructions in the guide assume that you’re using the Contemporary Theme.

This guide refers to Sage CRM but your system might have a different brand name, such as Sage 200 Sales and Marketing. The system works in the same way regardless of its name. The functionality that’s available to you depends on the modules that you’re licensed to use.
System configuration

- Internet Explorer Clear button
- Viewing Quick Find logs
- Restarting the Quick Find service
- Reinstalling the Quick Find service
- Changing the Quick Find service port
- Rebuilding the Quick Find index
- Using Quick Find with a 64-bit JRE
- Restarting the CRM Indexer Service

Internet Explorer Clear button

When you view Sage CRM in Internet Explorer, the Clear ([X]) button on small input fields lets you clear the field contents. The button is controlled by an IE pseudo-element and is displayed based on a combination of the element width, font size, and padding. For more information about the -ms-clear pseudo-element, see https://msdn.microsoft.com/en-us/library/windows/apps/ hh465740.aspx.

Depending on the version of Sage CRM and Internet Explorer that you're using, the button might not appear. You can use a Sage CRM CSS workaround to ensure the button always appears. This example displays the Clear button on date picker time fields in Sage CRM when using the Color theme. Add this to \CRM\WWWRoot\Themes\color1.css.

```css
.EEDIT.hasDatepicker { font-family: Tahoma, Arial; font-size: 11px; } .EEDIT[name$="_TIME"] { font-family: Arial; font-size: 11px; }
```
Viewing Quick Find logs

The Quick Find log for a particular Sage CRM installation is called yyyymmddkeywordSearch.log and is located in %ProgramFiles(x86)\Sage\CRM\<CRM Instance Name>\Logs.

Quick Find service logs are located in \CRM\Services\Logs\QuickFind.

To set logging levels, modify the level for the keyWordSearch logger in log4j.xml in \CRM\tomcat\webapps\crm\WEB-INF. The most useful settings are DEBUG and ERROR.

Restarting the Quick Find service

If an error occurs when you restart the Quick Find service from <My Profile> | Administration | System | Quick Find, you can restart the service on the server using the Services Control Panel, or by running the following commands from a command prompt:

```
net stop SageCMRQuickFindService
net start SageCMRQuickFindService
```

If you can restart the service from the Services Control Panel or the command prompt but not from Sage CRM, the Sage CRM user account probably does not have the Start/Stop Windows Services permission, or cannot access net.exe.

**Note:** Restarting the service does not rebuild the index.

Reinstalling the Quick Find service

To reinstall the Quick Find service, go to CRM\Services\QuickFind\bin and run SageCRMQuickFind-install-svc.cmd as a user with local administrator rights. This removes the Windows service and recreates it using settings in the .cmd file. The service starts when it's recreated.
Changing the Quick Find service port

You can change the port used by the Quick Find service if it's used by another application on the Sage CRM web server.

By default, the Quick Find service listens on port 8983 on localhost. The Quick Find service is bound to localhost so it does not respond to requests originating from a different Sage CRM web server. This is necessary because the filtering of Quick Find results is carried out in another part of Sage CRM.

To change the port:

1. In Management Studio, configure the port and hostname in the SolrEngineUrl entry on the Custom_Sysparams table.
   - UPDATE Custom_SysParams SET Parm_Value = N'http://<hostname>:<port>/solr/'
   - WHERE Parm_Name = N'SolrEngineUrl'
   - This entry contains a URL endpoint for the Quick Find service, such as http://localhost:8983/solr/
   - Do not bind the Quick Find service to any IP address that's accessible remotely. On a multi-server installation of Sage CRM, each CRM web server hosts its own instance of the Quick Find service.

2. In Sage CRM, click <My Profile> | Administration | System | Metadata.
   - Select Refresh System Parameters.
   - Click Execute Refresh.

3. Use Notepad to open the Quick Find service installer file:
   - \CRM\Services\QuickFind\bin\SageCRMQuickFind-install-svc.cmd. Configure the port and other options and save your changes.
   - The Quick Find port parameter is in the QUICKFIND_PORT parameter setting.
   - The host / IP address is in the QUICKFIND_HOST parameter.
   - It is strongly advised that you do not change the QUICKFIND_HOST variable from localhost to a port accessible remotely from the Sage CRM web server.

4. Double-click SageCRMQuickFind-install-svc and run it as a local administrator. Alternatively, run it as a local administrator from a command prompt. The Quick Find service is stopped, uninstalled, and reinstalled with the new settings.

5. If you encounter an error starting the service, check the logs in \CRM\Services\Logs\QuickFind.
Rebuilding the Quick Find index

If the Quick Find index is corrupted, you can rebuild it by adding and removing an entity in <My Profile> | Administration | System | Quick Find.

**Warning:** Rebuilding the full index can consume significant system resources if a large amount of data is added to the index.

To manually rebuild the index:

1. Stop the Quick Find service using the following command:
   ```
   net stop SageCRMQuickFindService
   ```
2. Delete the \CRM\QuickFind directory.
3. Clear the value for the SolrLastIndexScan entry in the Custom_Sysparams table.
4. Restart the Sage CRM Tomcat service, or refresh the system parameter and tables and columns metadata in <My Profile> | Administration | System | Metadata.
5. Start the Quick Find service using the following command:
   ```
   net start SageCRMQuickFindService
   ```
6. If the index is not rebuilt and \CRM\QuickFind is not recreated, do the following:
   - Start the Quick Find service from the Services Control Panel. For more information, see Restarting the Quick Find service.
   - Check the keywordSearch.log in \CRM\Logs.
   - Ensure the ServerNames value in the Custom_Sysparams table is correct. The Quick Find service starts on the first server in the list.

Using Quick Find with a 64-bit JRE

Quick Find uses the 32-bit Java Runtime Environment (JRE) supplied with Sage CRM. This limits the RAM available to the Quick Find service to approximately 1GB, which is sufficient for large Sage CRM databases (multiple tens of gigabytes).

You can use 64-bit JRE with the Quick Find service so the service can index more data.

**Warning:** Change to a 64-bit JRE with caution and only if memory-related issues occur with the Quick Find service.
1. Install a 64-bit Java 8 JRE on the Sage CRM web server or another machine.

2. Copy the contents of the JRE folder to a new folder called \CRM\Services\JRE\jre8x64. Ensure the path to the x64 Java.exe is \CRM\Services\JRE\jre8x64\bin\java.exe.

3. Stop the Quick Find service if it’s running.

4. Navigate to \CRM\Services\QuickFind\bin and make a copy of SageCRMQuickFind-install-svc.cmd.

5. Open SageCRMQuickFind-install-svc.cmd in a text editor.

6. Change the following settings:
   
   - **PR_JAVA_HOME**: Point this to the new JRE. For example, %CRM_SERVICES_DIR%\JRE\jre8x64.
   
   - **QUICKFIND_JVM**: There is no client mode for the x86 JRE. Point this to %PR_JAVA_HOME%\bin\server\jvm.dll.
   
   - **ALLOCATED_MEM**: The amount of memory to make available for the Quick Find service.
   
   - **SERVICE_EXE**: Select a service executable from \CRM\Services\QuickFind\bin.

7. Save and close SageCRMQuickFind-install-svc.cmd.

8. Double-click SageCRMQuickFind-install-svc.cmd. A command prompt window opens and displays the status of the Quick Find service. The service should start when you’ve completed these steps.

**Restarting the CRM Indexer Service**

The CRM Indexer Service that’s used for Keyword Search stops. A message is displayed stating that the keyword search index has not been updated recently and the results may be incorrect.

1. Reset IIS.

2. Restart Sage CRM.

3. If the message persists, initialize the indexing service in one of the following ways:
   
   - Put field-level security on any primary entity text field. For example, deny rights. You can take the field-level security off the field immediately.
   
   - Select a Keyword Search view. For example, vSearchListCompany. Unselect the Keyword Search checkbox for the view and save. Then reselect the Keyword Search checkbox and save again.
   
   - Delete the FullText.ix folder from the Library. After a default interval of five minutes, the indexer service starts to build a full index. You can specify the gap between incremental indexes in <My Profile> | Administration | System | Keyword Search | Interval.
## Groups

- Exporting groups

### Exporting groups

<table>
<thead>
<tr>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
</table>
| An error occurs when exporting a group to a text file                | 1. Open the db.properties file in `%ProgramFiles (x86)%\Sage\CRM\<CRM Instance Name>\tomcat\webapps\crmxxj\WEB-INF`.  
                                                                 | 2. Locate the jdbc settings and ensure the server name in the settings matches the CRM server name rather than local host name. |
| A Services not available error is written to scrm.log when exporting a group. | 1. Disable the antivirus software or firewall.  
                                                                 | 2. Run the startup.bat file in `%ProgramFiles (x86)%\Sage\CRM\<CRM Instance Name>\tomcat\bin`.  
                                                                 | 3. If prompted, give Java or Tomcat permission to run. |
| A group is exported to a CSV file but the exported file doesn't automatically open or your browser doesn't prompt you to open the file. | Ensure your browser doesn't block pop-up windows and ActiveX plugins. |
Email and documents

- Email Management
- Formatting an email in Outlook
- Classic Outlook Integration
- Lite Outlook Integration
- Exchange Integration
- Mail merge
- MailChimp Integration
Email Management

- Email Management not filing outbound emails
- Email Management creating two communications
- CDOSYS not sending emails out

Email Management not filing outbound emails

If you can send emails from Sage CRM but Email Management doesn't file them as communications (or cases) in the Sage CRM database, do the following:

1. Ensure that you've configured the Mail Manager Filing Address and set a prefix in `<My Profile> | Administration | Email and Documents | Email Configuration`.
2. Check that you've created an entry for the Email Management Filing Address in `<My Profile> | Administration | Email and Documents | Email Management Server Options`.
3. To check that outbound email is sent to the Mail Manager Filing Address mailbox, disable Email Management on this mailbox. To do this, open the Email Management Filing Address entry in `Email Management Server Options` and deselect `Enabled`.
4. Send an email from Sage CRM and check the Mail Manager Filing Address mailbox for the email.
5. To re-enable Email Management on the mailbox, open the Email Management Filing Address entry in `Email Management Server Options` and select `Enabled`.
   If Email Management is running on the mailbox and reading emails successfully, the email you sent disappears from the mailbox. If it doesn’t disappear, recheck the Email Management Filing Address, specifically the Email Account logon and password.
6. To enable debugging, click `<My Profile> | Administration | Email and Documents | Email Configuration` and select `Yes` from `Debug`.
7. Check the log file (`yyymmd<install name>MailManager.log`) in `...\Program Files\Sage\CRM\Services\Logs`.
   If a `cannot log` message is displayed in the file, the Email Account logon and password you specified for the Email Management Filing Address are incorrect.
8. Check the RogueMails folder to ensure there’s no erroneous formatting in the email (which can be generated by a bug in an email server or client). The folder is located in `...\Program Files\Sage\CRM\Services\CustomPages\Scripts\RogueMail`. 
Email Management creating two communications

Email Management creates two communications in Sage CRM for each email it files if you’re using the Communication template and you’ve set Default Ruleset Action to Create a Communication.

To stop Email Management creating two communications for each email it files:

1. Click <My Profile> | Administration | Email and Documents | Email Management Server Options.
2. Set Default Ruleset Action to None.

CDOSYS not sending emails out

If you select CDONTS/CDOSYS from <My Profile> | Administration | Email and Documents | Email Configuration | Send Mail Using but can't send outbound emails, do the following:

1. To ensure CDOSYS is installed, open IIS and look for a Virtual Server folder. This folder is present only if CDOSYS is installed.
2. To check that CDOSYS is running, open IIS, right-click the Default SMTP Virtual Server Folder and click Start.
3. Open the CDOSYS BadMail folder. If there are emails in this folder, emails are not getting from the CDOSYS SMTP server to the mail server, or are being bounced back. If this is the case, open the emails to find the error.
   - The From address may not be configured for emails that are sent as notifications from Sage CRM. To correct this, click <My Profile> | Administration | Advanced Customization | Workflow and configure Notify Email Name and Notify Email Address.
   - The To address might not be configured. This is also possible for emails that are sent as notifications or from workflows. Check the bad email to see where it’s coming from, then configure the email address.
4. Open the CDOSYS Queue and Pickup folders. If there are emails in these folders, CDOSYS is not running, or the mail server is not relaying emails. Ensure the mail server is configured to relay emails from the Sage CRM server.
5. To ensure that CDOSYS can find the mail server, open IIS Manager, right-click Default SMTP Server and select Properties | Delivery/Advanced. Enter the IP address of the mail server in Smart Host and restart CDOSYS.
6. Check that the mail server allows relaying. If it doesn’t, emails can be delivered to internal company mailboxes but not to external mailboxes. Ask the mail server administrator to enable relaying.
Formatting an email in Outlook

When a user files an email in Microsoft Outlook and then opens the email in Sage CRM, the email body may contain incorrect formatting such as extra paragraphs, lines, and spaces.

This issue is caused by the default settings in the CKEditor configuration file. As a result, CKEditor overrides the original Outlook formatting and extra paragraphs, lines, and spaces may appear in filed emails.

CKEditor is a third-party component used by Sage CRM to process emails. For more information about the CKEditor configuration file, go to http://docs.ckeditor.com/#!/guide/dev_configuration.

To fix this issue, edit the CKEditor configuration file on your Sage CRM server:

1. Locate the Config.js file. 
   Below is the default location of the file:
   %ProgramFiles(x86)%\Sage\CRM\CRM\WWWRoot\ckeditor

2. Open Config.js in a text editor such as Notepad.

3. To prevent the insertion of extra paragraphs, add the following code immediately above the line
   ```
   config.toolbar = "Full";
   config.autoParagraph = false;
   ```

4. To prevent the insertion of extra spaces and disable default CKEditor styling, append the following code to the file:
   ```
   config.allowedContent =
   {
   $1:
   {
     elements: CKEDITOR.dtd,
     attributes: true,
     styles: true,
     classes: true
   }
   }
   config.contentsCss=[];
   ```

5. Save your changes and close the file. As a result, the Config.js file should look as shown in Sample Config.js file.

6. Open IIS Manager and restart the Sage CRM web site.
Sample Config.js file

After you’ve edited the Config.js file as described in Formatting an email in Outlook, the file should look as follows:

CKEDITOR.editorConfig = function( config )
{
    config.autoParagraph = false;
    config.toolbar = "Full";
    config.disableNativeSpellChecker = false;
    config.resize_enabled = false;
    config.fillEmptyBlocks = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.pasteFromWordRemoveFontStyles = false;
    config.extraAllowedContent = 'img(*)(*)[*]';
    config.toolbar = [
        {
            name: 'document',
            groups: [ 'mode', 'document', 'doctools' ],
            items: [ 'Source', '-', 'Preview', 'Print', 'Templates' ]
        },
        {
            name: 'clipboard',
            groups: [ 'clipboard', 'undo' ],
            items: [ 'Cut', 'Copy', 'Paste', 'PasteText', 'PasteFromWord', '- ', 'Undo', 'Redo' ]
        },
        {
            name: 'editing',
            groups: [ 'find', 'selection', 'spellchecker' ],
            items: [ 'Find', 'Replace', '-', 'SelectAll' ]
        },
        {
            name: 'basicstyles',
            groups: [ 'basicstyles', 'cleanup' ],
            items: [ 'Bold', 'Italic', 'Underline', 'Strike', 'Subscript', 'Superscript', '-', 'RemoveFormat' ]
        },
        {
            name: 'links',
            items: [ 'Link', 'Unlink', 'Anchor' ]
        },
        {
            name: 'insert',
            items: [ 'Table', 'HorizontalRule', 'SpecialChar', 'PageBreak', 'Maximize' ]
        },
        '/',
        {
            name: 'paragraph',
            }
groups: [ 'list', 'indent', 'blocks', 'align', 'bidi' ],
items: [ 'NumberedList', 'BulletedList', '-', 'Outdent', 'Indent', '-', 'Blockquote', 'CreateDiv', '-', 
'JustifyLeft', 'JustifyCenter', 'JustifyRight', 'JustifyBlock', '-', 'BidiLtr', 'BidiRtl' ]
)
ewhere {
    name: 'styles',
    items: [ 'Styles', 'Format', 'Font', 'FontSize' ]
},
where {
    name: 'colors',
    items: [ 'TextColor', 'BGColor' ]
}
config.fontSize_sizes = 
'8/8pt;9/9pt;10/10pt;11/11pt;12/12pt;14/14pt;16/16pt;
18/18pt;20/20pt;22/22pt;24/24pt;26/26pt;28/28pt;36/36pt;
48/48pt;72/72pt';
config.allowedContent = 
{
    $1: 
    {
        elements: CKEDITOR.dtd,
        attributes: true,
        styles: true,
        classes: true
    }
};
config.contentsCss=[];
Classic Outlook Integration

- Installing the Classic Outlook Plugin
- Uninstalling the Classic Outlook Plugin
- Viewing the Classic Outlook Plugin logs
- Using Classic Outlook Integration with Auto Login
- Installing Outlook Plugin using XenApp or RDS

Installing the Classic Outlook Plugin

When installing the Classic Outlook Plugin, the installation process fails half way through and an error message is displayed.

- In IE, go to Tools | Internet Options | Security | Trusted Sites and add the Sage CRM web site to the list of trusted sites.
- If possible, disable antivirus software and firewalls while you install the plugin.

Uninstalling the Classic Outlook Plugin

1. Back up the system registry before making any modifications to the registry keys.
2. Open the registry editor (regedit.exe).
3. Delete the following keys if they exist.
   - HKEY_CURRENT_USER\Software\ACCPAC\CRM
   - HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\SageCrmOutlookAddIn2010
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\ACCPAC\CRM
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Code Store Database\Distribution Units\{0AFD9937-10D5-436F-9F2B-08BF6175446}
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\ModuleUsage\C:/Windows/Downloaded Program Files/OtlTools.ocx
   - HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\SharedDlls\crmoutlook plugin*.*
Viewing the Classic Outlook Plugin logs

- If there’s a problem when installing the plugin, check `%Temp%\crmclientinstallLog` for details.
- If any errors occur when you run the plugin, check `%UserProfile%\Users\<username>\AppData\Roaming\Sage\CRM\OutlookPlugin\errorsdn.svcLog` for details. The best way to view the svcLog file is with the Service Trace Viewer Tool. You can download it here: https://msdn.microsoft.com/en-us/library/ms732023(v=vs.110).aspx
- If there are issues with the Classic Outlook plugin, you should manually uninstall it. Also uninstall the Lite Outlook plugin if it's on the computer, and then install the Classic Outlook plugin.

Using Classic Outlook Integration with Auto Login

The recommended setting when using IIS Auto Login is to disable IIS Anonymous Authentication on the CRM web server. Classic Outlook Integration doesn't work when Anonymous Authentication is disabled and the user is prompted for a user name and password when trying to use the Integration. The following workaround lets you use Classic Outlook Integration with Auto Login. The client sends out one or two additional HTTP requests in the background, but no further user interaction is required.

1. Open IIS Manager (`inetmgr.exe`), expand the CRM virtual directory and double-click URL Rewrite.
2. Click Add Rule(s).
3. In Inbound rules, double-click Blank rule and name the rule Outlook plugin - force Windows authentication.
4. In the Match URL section:
   a. Set Requested URL to Matches the Pattern.
   b. Set Using to Regular Expressions.
5. Set Pattern to *eware.dll/go and select Ignore case.
7. Add a condition with an input of {QUERY_STRING}.
   a. Set Check if input string to Matches the Pattern.
   b. Set Pattern to OutlookAction=logon.
   c. Select Ignore case.
8. Add a condition with an input of \{HTTP\_AUTHORIZATION\}.
   a. Set **Check if input string** to **Does Not Match the Pattern**.
   b. Set **Pattern** to **Negotiate\.***.
   c. Select **Ignore case**.
9. Add a condition with an input of \{HTTP\_AUTHORIZATION\}.
   a. Set **Check if input string** to **Does Not Match the Pattern**.
   b. Set **Pattern** to **NTLM\.***.
   c. Select **Ignore case**.
10. In Action, set **Action type** to **Custom Response**.
11. In Action Properties:
   a. Set **Status code** to **401**.
   b. Set **Substatus code** to **0**.
   c. Set **Reason** to **Unauthorized - plugin auth**.
   d. Set **Error description** to **Outlook plugin must use Windows authentication**.
12. Click **Apply**.
Lite Outlook Integration

- Installing the Lite Outlook Plugin
- Uninstalling the Lite Outlook Plugin
- Working with Lite Outlook Integration
- Filing emails with Lite Outlook Integration
- Relinking orphaned email records
- Load balancing Lite Outlook Integration
- Installing Outlook Plugin using XenApp or RDS

Installing the Lite Outlook Plugin

If a security certificate is missing on a user's machine, an error message is displayed when the user tries to install the Lite Outlook Plugin.

1. Uninstall the plugin.
2. Open a browser and go to Thawte Root Certificates (http://www.thawte.com/roots/).
3. Click Download root package.
4. When the certificates are installed, run the Lite Outlook Plugin Installer as normal.
Uninstalling the Lite Outlook Plugin

1. Back up the system registry before making any modifications to the registry keys.
2. Open the registry editor (regedit.exe).
3. Delete the following keys if they exist.
   - HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\SageCrmOutlookAddIn2010ForExchange
   - HKEY_CURRENT_USER\Software\Sage
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\CodeStore\Database\Distribution Units\{0AFD9937-10D5-436F-9F2B-08BF6175446}
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\ModuleUsage\C:\Windows\Downloaded Program Files/OtlTools.ocx
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\SharedDLLs (C:\Windows\Downloaded Program Files\OtlTools.ocx)
   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Sage\Sage CRM\Outlook Plugin

Working with Lite Outlook Integration

When using Lite Outlook Integration, if an error occurs with the CRM Server, do the following:

1. Log on to Sage CRM.
2. Check the Sage CRM URL and note if the protocol is HTTPS or HTTP.
3. Back up the system registry before making any modifications to the registry keys.
4. Open the registry editor (regedit.exe).
5. Open HKEY_CURRENT_USER\Software\ACCPAC\CRM\OutlookPlugin.
6. Update the OutlookPort value to 80 for HTTP and 443 for HTTPS.
7. Restart Outlook.

Filing emails with Lite Outlook Integration

When a user tries to file an email from a sender that does not have a corresponding record in Sage CRM, the following JavaScript error occurs: "Unable to get value of the property 'value': object is null or undefined."
This issue is caused by missing values for `cmli_comm_companyid` and `_HIDDENcmli_comm_companyidTEXT` in the `getSelection` function.

1. Click `<My Profile> | Administration | Customization | Translations`.
2. Delete `FileIT` in `filecrm` caption and add the following instead.

```html
E-mail Target
<script>
window.attachEvent("onload", function () {
  if (document.location.href.indexOf("Act=6011")>-1)
  {
    if (!getElm("cmli_comm_companyid")&&!getElm("_HIDDENcmli_comm_companyidTEXT"))
    {
      var dummy1 = document.createElement("input");
      with (dummy1)
      {
        type = "hidden"; id = "cmli_comm_companyid"; value = "";
      }
      var dummy2 = document.createElement("input");
      with (dummy2)
      {
        type = "hidden"; id = "_HIDDENcmli_comm_companyidTEXT";
        value = "";
      }
      getElm("_Datacmli_comm_personid").appendChild(dummy1);
      getElm("_Datacmli_comm_personid").appendChild(dummy2);
    }
  }
});
function getElm (a) { return document.getElementById(a);}
</script>
```

Relinking orphaned email records

If a user files an Outlook email in Sage CRM but does not link the email to a Person or Company, the resulting Communication record becomes an orphan record in Sage CRM and is difficult to find.

To solve this issue, you can create an Interactive dashboard gadget to display orphan Communication records, a flag to identify orphan records, and a table level script to link an orphan Communication record to an existing Person or Company record.

1. Click `<My Profile> | Administration | Customization | Primary Entities | Communication | Views` and click `New` to create a view that filters on orphaned Communication records.
a. Name the view vCommOrphanedEmail.

b. To make the view available when creating a new gadget, select Reports View.

c. Enter a short description and a translation.

d. Enter the following in View Script.
   ```
   create view vCommOrphanedEmail as
   select * from vcommunication
   where comm_type = N'Email'
   and Comm_Action = N'EmailIn' and CmLi_Comm_PersonID is null
   and CmLi_Comm_CompanyID is null and Comm_Deleted is null
   and CmLi_Comm_UserID is not null
   ```

e. Click Save.

2. Click Reports | General and click New to create a report that displays orphaned Communication records.

   a. Name the report Orphaned Emails.

   b. Choose vCommOrphanedEmail as the source view.

   c. Select Filter by Current User and Filter by User's Primary Team.

   d. Add Subject, From, and To columns to the report. Add any other columns you want to display on the dashboard.

   e. Click Continue and then click Save.

3. Click My CRM | Dashboards and open the interactive dashboard to which you want to add the new gadget.

   a. Click New Gadget | Create Gadget and select List.

   b. Select the Communication entity. Click Next to proceed through the wizard.

   c. Select the Orphaned Emails report as the data source.

   d. Select Go To Summary Screen from Drill Down.

   e. Name the gadget and click Finish.

4. Click <My Profile> | Administration | Customization | Primary Entities | Communication | Fields and click New to create a field that acts as a flag on a filed email.

   a. Select Adv Search Select from Entry Type.

   b. Enter comm_linkorphan in Column Name.

   c. Enter Link Orphan in Caption.

   d. Select Person from Search Entity.

   To link an orphan Communication record to a Company record, select Company instead.

   e. Click Save.

5. Click <My Profile> | Administration | Customization | Primary Entities | Communication | Screens to add the new field to the Email Filing screen.
a. Click the **Edit** beside **EmailFilingBox**.

b. Select **comm_linkorphan** from **Field**.

c. Enter the following in **Create Script** to hide the field for emails that are not orphans:

```
if ((CRM.GetContextInfo("Communication","comm_type")=='Email')
&& (CRM.GetContextInfo("Communication","Comm_Action")=='EmailIn')
&& (CRM.GetContextInfo("Communication","CmLi_Comm_PersonID")=='")
&& (CRM.GetContextInfo("Communication","CmLi_Comm_CompanyID")=='"'))
{
    Hidden = false;
}
else Hidden = true;
```

d. Click **Add** and then click **Save**.

6. Click **<My Profile> | Administration | Customization | Primary Entities | Communication | TableScripts** to create a table level script on Communication that checks whether there's a value in **comm_linkorphan**.

a. Click **New**.

b. Add the following to **Table level script**. If there's a value in the **comm_linkorphan** field, the script links the Communication record to the Person entity and clears the existing **comm_linkorphan** value.

To link an orphan Communication record to a Company record, replace **CmLi_Comm_PersonId** with **CmLi_Comm_CompanyId** in the script below.

```
function UpdateRecord ()
{
    if (IsValid(Values("comm_linkorphan")))
    {
        var PrimaryCommLink = CRM.FindRecord("Comm_Link",
        "CmLi_Comm_Communicationid=" +
        WhereClause.replace(/comm_communicationid\=\(\d*\)\.*/i,"$1")
        + " and CmLi_Comm_UserID is not null");
        PrimaryCommLink.item("CmLi_Comm_PersonID") =
        Values("comm_linkorphan");
        PrimaryCommLink.SaveChanges();
        Values("comm_linkorphan") = "";
    }
}
```

c. Click **Save**.
Load balancing Lite Outlook Integration

In a multi-server environment, the Lite Outlook Plugin should connect to Load Balancing and identify which server is available. Instead, it reads the name of the server from the time of installation and adds it to the Windows registry. The plugin reads this key each time it tries to connect to the Sage CRM database.

To work around this issue:

1. Update the Windows Registry key `HKEY_CURRENT_USER\Software\Sage\Lite Outlook Plugin\` to the correct server name.
2. During installation, change the server name to the main server name rather than the backup server name to ensure service integrity.

Installing Outlook Plugin using XenApp or RDS

You can install the Lite Outlook Plugin or Classic Outlook Plugin on a Citrix XenApp server or a Windows Server that has the Remote Desktop Services role deployed. Complete the following steps if the installation of the plugin fails or if the plugin doesn't work properly. For example, the options it provides are not available to all users.

1. Locate the following folder that was created during the plugin installation:

   `%UserProfile%\AppData\Local\Temp\<Integer>\otlplugin`

   where `<Integer>` can be any number.

2. Copy the `otlplugin` folder to the `Temp` folder, and then delete the `<Integer>` folder. As a result, the path to the `otlplugin` folder will look as follows:

   `%UserProfile%\AppData\Local\Temp\otlplugin`

3. Reinstall the plugin.
Exchange Integration

- Connecting to Exchange Server
- Using a non-default IIS port
- Synchronizing contacts
- Impersonating the requested user
- Enabling logs to identify errors

Connecting to Exchange Server

<table>
<thead>
<tr>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Impersonation rights</td>
<td>The Exchange Server User Name specified in Exchange Server Connection Setting requires impersonation rights in Exchange. Check the user rights in Exchange.</td>
</tr>
<tr>
<td>Cannot access EWS URL</td>
<td>If the EWS URL cannot be accessed, the connection cannot be set up. Paste the EWS URL into a browser and check it can be accessed using the impersonation user’s username and password.</td>
</tr>
<tr>
<td>Wrong authentication settings on EWS folder</td>
<td>If the EWS folder in IIS on Exchange Server has the wrong authentication settings, the connection cannot be set up. For more information, see Configuring Exchange Server in the System Administrator Help.</td>
</tr>
<tr>
<td>Tomcat is not running</td>
<td>The Tomcat service is required to establish the Exchange connection and to run the Sync Engine. If the Tomcat service is not running, errors usually occur in other areas of Sage CRM that rely on this service. For example, the Interactive Dashboard. Restart the Tomcat service if it has stopped. Alternatively, you can schedule a Tomcat service restart.</td>
</tr>
<tr>
<td>jdbc.properties or syncengine.properties contain incorrect server or port information</td>
<td>The jdbc.properties file contains the wrong server name or port number, or the syncengine.properties file contains the wrong server name. These files are typically located in ..\Program Files\Sage\CRM[installname]\tomcat\webapps[installname]ExchangeSyncEngine\WEB-INF.</td>
</tr>
</tbody>
</table>
Using a non-default IIS port

If you change the default port for Sage CRM on IIS to any port other than port 80 and then set up Exchange Integration, the following error is displayed.

**CRM is attempting to establish a connection with the Sync Engine. Please wait..**

The Exchange Server connection could not be saved as CRM was unable to connect to the Sync Engine.

To resolve this issue:

1. Click `<My Profile>` | Administration | Email and Documents | Exchange Server Integration | Connection Management.
2. Set **Use Default Sync Engine Location** to **No**.
3. Enter the server name and port number separated by a colon (:) in **Sync Engine Location**. For example, `http://SERVER:8080/sdata/crmExchangeSyncEngine/crmExchange/-/`.

Synchronizing contacts

When you enable contact synchronization in Exchange Integration, the contacts are added to the **EcngSyncResource** table. They are then moved to the **EWSSyncResource** table and the number of contacts decreases as they're processed.

However, running the following SQL statement shows that x number of records have been added to the **EcngSyncResource** table but they have not been successfully moved to the **EWSSyncResource** table.

```
select * from EcngSyncResource with (NOLOCK)
where exsr_UUID not in (select EWRS_UUID from EWSSyncResource WITH (NOLOCK))
and exsr_Deleted is null and exsr_processed = 0 and exsr_EndpointID in (6009,6014)
```

To troubleshoot this issue, update one of the contacts before performing a synchronization to check if it processed. Also check the log files for any errors or conflicts when processing the records.

**Note:** The **exsr_NoUpdateToRecord** column is set to 1 during Exchange synchronization if the record has not been updated since the last synchronization session.

Impersonating the requested user

Sage CRM is unable to send emails from certain users, or it can only send emails to email addresses that are on the same domain as the sender, or all emails sent from Sage CRM appear to be from the same address.
This issue can be caused by the Sage CRM SMTP user having insufficient rights on the Exchange mail server to send emails using a different email address.

To send emails from Sage CRM as any user, you must enable the SendAs right on the Exchange server using PowerShell. For detailed information, see Granting the SendAs right to an SMTP user in the System Administrator Help.

Enabling logs to identify errors

Enable the following logs to help identify the cause of Exchange Integration failures.

- Use the IIS log to check if a request reached IIS Web Server. Enable this log in IIS Manager.
- Use the Tomcat access log to establish if the request reached Tomcat server. To enable this:
  a. Open `<installed instance dir>\tomcat\conf\server.xml`.
  b. Change
     ```
     <!--
     <Valve className="org.apache.catalina.valves.AccessLogValve"
     directory="logs"
     prefix="localhost_access_log." suffix=".txt" pattern="common"
     resolveHosts="false"/>
     -->
     To
     <Valve className="org.apache.catalina.valves.AccessLogValve"
     directory="logs"
     prefix="localhost_access_log." suffix=".txt" pattern="common"
     resolveHosts="false"/>
     ```

- Use the detailed Sync Engine log to view detailed information about what happened in the Sync Engine, including detailed information about requests made from Sync Engine. To enable this:
  a. Open `<installed instance dir>\tomcat\webapps\<Sync Engine folder>\WEB-INF\log4j.properties`.
  b. Change
     ```
     # defaultLog - default catch-all
     log4j.rootLogger=ERROR, defaultLog
     To
     log4j.logger.httpclient.wire.header=DEBUG
     log4j.logger.org.apache.commons.httpclient=DEBUG
     # defaultLog - default catch-all
     log4j.rootLogger=ALL, defaultLog
     ```
Mail merge

- Performing a mail merge
- Using custom merge fields
- Creating a quote or order mail merge
- HTML content removed in text editor

Performing a mail merge

<table>
<thead>
<tr>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail merge fails because Tomcat is not running.</td>
<td>The Tomcat service is required to perform a mail merge. If the Tomcat service is not running, errors usually occur in other areas of Sage CRM that rely on this service. For example, the Interactive Dashboard. Restart the Tomcat service if it has stopped. Alternatively, you can schedule a Tomcat service restart.</td>
</tr>
</tbody>
</table>
| Mail merge fails when a large number of records are merged. | - Reduce the size of the mail merge template by resizing images or changing images to GIF format.  
| | - Reduce the number of records that are merged at once. For example, perform a merge on all person records with names beginning with A-L and then perform a second merge on all person records with names beginning with M-Z. |
| Mail merge fields that are not included in a group's Group Content list are not merged when performing a mail merge on a static or dynamic group. | This issue can occur on upgraded versions of Sage CRM. Run the following query:  
update Custom.SysParams set Parm_Value = 'N' where parm_name = 'AllowDupRecs'  
And then perform a metadata refresh. |
| Mail merge fails and an SQL error 208 is displayed. | The number of columns in a view exceeds 1024 columns. Remove fields from the view and perform the mail merge again. Test this on a local test environment before you implement it on the production server. For more information, see Optimizing a custom entity list for faster loading in the System Administrator Help. |
Using custom merge fields

An error can occur when a custom merge field is detected in a mail merge template but can’t be found in the mail merge view.

To resolve this error, ensure the view contains all custom merge fields that are used in the mail merge.

Creating a quote or order mail merge

Errors can occur when performing a mail merge from a quote or order if the opportunity is not assigned to a company and person. The template contains merge fields from the company and person entity, but the opportunity doesn't contain the required information.

To resolve these errors, select a company and person for the opportunity.

HTML content removed in text editor

Users can paste content from Microsoft Word or HTML source code into the text editor. By default, the Advanced Content Filter in the text editor removes disallowed HTML tags or HTML styling information that's not recognized by the text editor. The most typical issue is that style tags and attributes are removed and default fonts are used instead.

1. To disable the Advanced Content Filter, open config.js in the `<Sage CRM installation folder>\WWWRoot\ckeditor\` directory.

2. Add the following line to set the `allowedContent` property to `true`.

   ```javascript
   CKEDITOR.editorConfig = function( config )
   {
   config.toolbar = "Full";
   config.disableNativeSpellChecker = false;
   config.resize_enabled = false;
   config.fillEmptyBlocks = false;
   config.pasteFromWordRemoveFontStyles = false;
   config.pasteFromWordRemoveFontStyles = false;
   // config.extraAllowedContent = 'img(*){*}[*]';
   config.allowedContent = true;
   config.toolbar = [
   ```
3. Run `iisreset` at the command prompt to restart IIS on the Sage CRM server.

4. Clear the browser cache on all users' machines.
### MailChimp Integration

<table>
<thead>
<tr>
<th>Issue</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you send a group to MailChimp, the Sage CRM notifications area displays <em>Merge Max Limit Exceeded.</em></td>
<td>Remove all unsupported merge fields from your list in MailChimp.</td>
</tr>
<tr>
<td>This message indicates that your list in MailChimp includes one or more merge fields that are not supported by Sage CRM.</td>
<td>For a list of supported merge fields, see &quot;MailChimp merge fields supported out of the box&quot; in the <em>System Administrator Help</em> posted on the <a href="https://sagecrm.com/help-center">Sage CRM Help Center</a>.</td>
</tr>
<tr>
<td>For example, the default list in a new MailChimp account may contain the <strong>Birthday</strong> merge field, which is not supported by Sage CRM out of the box.</td>
<td></td>
</tr>
</tbody>
</table>
System customization

- Updating the name of a workflow rule
- Creating a lead using Web to Lead

Updating the name of a workflow rule

When you update the name of a workflow rule, it is not updated in the user interface.

When you create a workflow rule, Sage CRM inserts the rule name in both the Translation and the Caption Code fields. If you update a workflow rule name in <My Profile> | Administration | Advanced Customization | Workflow, only the Caption Code field is updated. To update the Translation field, do the following.

1. Click <My Profile> | Administration | Customization | Translations.
2. Enter WorkflowRule in Caption Family.
3. Enter <your new workflow rule> in Caption Code.
4. Click Find.
5. Click the caption code and click Change.
6. Enter the new workflow rule name in the Translations fields and click Save.

Creating a lead using Web to Lead

When you create a lead using Web to Lead, the Lead workflow action buttons are not displayed. Web to Lead automatically tries to save the lead in the Lead workflow and is unable to find a primary rule.

Note: When you create a new lead directly in Sage CRM, the Lead workflow action buttons are displayed.
1. Open the Lead workflow.
2. Open the primary rule (probably called New Lead) and ensure Table or view is set to Lead.
Mobile

- Configuring SSA fields on a mobile device
- Using Sage CRM Mobile

Configuring SSA fields on a mobile device

When you specify a restrictor field for an SSA field in <My Profile> | Administration | Customization | Primary Entities / Secondary Entities | <Entity> | Restrictor Fields, the restrictor field is not applied on a mobile theme.

You must also specify the restrictor field in the relevant mobile theme file.

1. Open the relevant mobile theme file using a text editor.
   - WWWRoot\mobile\lib\ssa\ssarestrictors.js
   - WWWRoot\tablet\ssa\ssarestrictors.js
   - WWWRoot\mobile\SmartPhone\ssa\ssarestrictors.js
2. Add the following line to the file:
   <ssa field containing the restriction>:['<field containing the filter value>','<field that's filtered>']
   For example:
   oppo_erpaccountid:['oppo_primarycompanyid','werp_companyid']
3. Save the file.

Using Sage CRM Mobile

If you experience problems while using Sage CRM Mobile from a smartphone or tablet, check the following troubleshooting tips.
<table>
<thead>
<tr>
<th>Issue</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sage CRM Mobile is not displayed</td>
<td>Ensure that the user agent for the mobile device is correctly mapped to the device in Sage CRM. The user agent might either be unassigned to a theme (device), or assigned to a different theme (device). For more information, see <em>Mapping a user agent</em> in the <a href="#">System Administrator Help</a>.</td>
</tr>
<tr>
<td>Devices link is not available in Advanced Customization area</td>
<td>The mobile license for Sage CRM is not installed. Contact your Business Partner about obtaining a license key with the mobile option.</td>
</tr>
<tr>
<td>Sage CRM Mobile is not displayed when Sage CRM is accessed through a link on the home screen</td>
<td>The mobile device sends a different user agent when a link is accessed from the home screen. Check unassigned user agents for a mobile device user agent, and map it to the correct theme (device).</td>
</tr>
<tr>
<td>Mobile device cannot locate the Sage CRM web server</td>
<td>Ensure that the Sage CRM installation is either publicly accessible or that the smartphone is connecting to a VPN which can access your Sage CRM account.</td>
</tr>
<tr>
<td>Default logon screen displayed instead of the Sage CRM Mobile screen</td>
<td>Sage CRM metadata has not yet been loaded. For example, due to an IIS reset. When you log on, Sage CRM Mobile is displayed as expected.</td>
</tr>
</tbody>
</table>
Running Sage CRM on Windows Server Essentials

After installation, complete the following steps to run Sage CRM on Windows Server Essentials.

1. Click Control Panel | User Accounts and disable User Account Control.
2. Launch Sage CRM.
3. If a service unavailable error occurs, set the bitness64 precondition in %windir%\system32\inetsrv\config\host.config.
   Change: `<add name="PasswordExpiryModule"
   image="C:\Windows\system32\RpcProxy\RpcProxy.dll" />
   To: `<add name="PasswordExpiryModule"
   image="C:\Windows\system32\RpcProxy\RpcProxy.dll"
   preCondition="bitness64"
   />
4. Reset IIS.
5. Launch Sage CRM. If an internal server error occurs, run the following command to turn off HTTP compression.
   `%windir%\system32\inetsrv\appcmd.exe set config -
   section:system.webServer/httpCompression /->[name='xpress']"
6. Reset IIS.
7. Launch Sage CRM.

Resetting the database logon password

If you need to change the database logon password, first change it in the SQL Server and then in Sage CRM.

1. In SQL Server, click the appropriate server.
2. Click the Security folder and then click Logins.
3. Right-click the relevant login, click Properties and change the password.
4. Go to the Management folder and right-click SQL Server Agent.
5. Click Properties | Connection and enter the new password.
6. Stop and start IIS. At the command prompt, type the following:
   ```
   net stop iisadmin
   net start w3svc
   net start msftpsvc
   ```
7. Log on to Sage CRM with system administrator rights.
8. Click <My Profile> | Administration | System | Database to view the log on to access the SQL database.
9. Click Change, enter a new password, and click Save.

Starting the CRM Indexer Service

The CRM Indexer Service feeds data to the CRM Keyword Search function. The service starts automatically but if it has been stopped and you want to start it again, you can do so manually.

1. Click Control Panel | Administrative Tools | Services.
2. Right-click CRM Indexer Service and click Start.
Uninstalling services

If the 2019 R2 Email Management Service and the Escalation Service are not correctly uninstalled when you restore a live environment, complete the following steps:

1. Click Start | Run and type cmd.
2. Browse to the folder where EwareEmailManager.exe is saved, type eWareEmailManager /u, and press Enter.
3. Browse to the folder where CRMEscalationService.exe is saved, type CRMEscalationService /u, and press Enter.

Re-installing services

To re-install the previous version of Email Management Service and the Escalation Service when you restore a live environment, complete the following steps:

1. Click Start | Run and type cmd.
2. Browse to the folder where EwareEmailManager.exe is saved, type eWareEmailManager /i and press Enter.
3. Browse to the folder where CRMEscalationService.exe is saved, type CRMEscalationService /i and press Enter.

Redirector errors

It's possible to run Sage CRM 2019 R2 on a machine that's also running Sage CRM 7.2 although you should not do this unless it's required for testing an upgrade to 2019 R2.

Sage CRM 7.2 uses the Managed Fusion URL Rewriter and Sage CRM 2019 R2 uses the ARR and URL Rewriter modules of IIS. The Sage CRM 7.2 Rewriter is located in %ProgramFiles(x86)\Sage\CRM\Services\IISUtils\CRMRewriter. If you install Sage CRM 7.2 after Sage CRM 2019 R2, it overwrites the SData settings in IIS and removes the rewriter rules for Sage CRM 2019 R2.

To recreate the rules:

1. Run Sage CRM 2019 R2 Setup.exe.
2. Click Change existing install.
3. Select the Sage CRM 2019 R2 installation. The required IIS rewriter rules are recreated for SData in IIS. Requests for the Sage CRM 7.2 installation won't find a match in the IIS 7.x rewriter rules and will use the Managed Fusion URL Rewriter.