

# Sage CRM

## Version 6.0 Patch Release Notes

### Overview

This document provides details of all Sage CRM patch releases for version 6.0. Installing the most recent 6.0 patch (M – Service Pack 2) ensures that you get all of the fixes included in earlier patches (if applicable).

### Prerequisites

You need to have Sage CRM 6.0 SP1 installed before you install any of the available patches. You can find out the version of Sage CRM you are running from the Logon page, which would read 'CRM version 6.0f', for example.

### Latest Version

**Latest Release:** Version 6.0

**DII:** 6.0.0.14



## How to Install Sage CRM Patches

Use the following procedure to install the latest Sage CRM patch:

1. Backup the existing CRM eWare.dll and database. The DLL is stored in the CRM installation directory, which is commonly in  
C:\Program Files\Sage\CRM\\WWWRoot
2. Run the Setup.exe.
3. When using the InstallShield wizard, you can choose to use either Windows authentication (using the currently logged on user's credentials) or SQL Server authentication (by entering the appropriate SQL Login ID and Password).

## Hidden System Parameters

*Hidden system parameters prior to 6.0:*

### **ShowTabsOnPopups**

To get back the tabs on all entities in pop-up windows that were removed in 5.8, run UPDATE Custom\_Sysparams SET Parm\_Value = 'Y' WHERE Parm\_Name = 'ShowTabsOnPopups' and refresh system parameters in Administration | Metadata. Note that the 5.8 change was by design to prevent multiple pop-ups and drilling down on pop-ups. Multiple sessions are not supported.

### **DefaultAppDateAsPerDay**

If set to Y and the user's Calendar view is day mode (does not apply for week), the default appointment date when creating a new appointment is the day and time that is displayed on-screen (i.e. the day and time that the user is looking at). Otherwise, today's date is the default.

### **CaseSensitive**

If set this to Y, this turns Case Sensitivity on and a lowercase(colname) is no longer done around the colnames. Note that, in order to stop this affecting other areas of the system, ConvertToLowercase.sql must be run. This renames the columns in the CRM database to be lowercase.

### **MaxPipeLineStages**

Use to specify how many stages can be displayed on an Opportunity or Cases pipeline. The default value for this is 20. The value can be changed in the database only.

### **IPAddressChecking**

The server checks the client IP address. If there is another logon using that IP address, an "IP mismatch" error is displayed. If set to N, client IP address checking is switched off.

### **LeadNoAutoPersonMatch**

If set to Y, a Lead is not automatically matched to the default person if the company has only one person.

### **SearchForAllPeople**

If set to Y when merging a Person, the Source Person can be any Person, i.e. the search is not limited to the current company.

### **ClientSecurityOff**

If set to Y, multiple users can log into a Solo client installation.

### **ReportsUsesCompanyTeams**

If set to Y, sensitive data is blanked out on reports. Sensitive data is any field that is not a Company, Person, Address, E-mail or Phone field.

### **AllowNewAppointments**

Defaults to Y, which is normal behaviour. If set to N, new appointments cannot be added in CRM. To this end, there are no New Appointment buttons on the Calendar or Communications list view, no Create Follow-up Appointment checkboxes, no time hyperlinks on calendar in day mode.



### **AlwaysBCCUser**

Default is blank, which is normal behaviour. If set to Y, the user's own e-mail address (from their user details screen) is added to the BCC field of the e-mail when they select the Send E-mail button in CRM. This means a copy of the mail will go into their Inbox.

### **MaxRecordsForGrid**

Set to 100 in the DLL and not currently exposed. If it needs to be increased, it will need to be changed in the DLL. If users have long task lists, only the first 100 records get displayed and a message is shown to say that there are too many records to display them all.

### **MaxRecordsForGridLastButton**

Set to 8000. If a grid has more than this number of records and a user selects the jump to the last button, a dialog box is displayed to inform them that they should narrow their search.

## Patch M (SP2)

**Released:** March 2008

**Files Included:** eWare DLL version 6.0.0.14, Outlook plugin 6.0.0.8, and Document plugin 6.0.0.6, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch M (SP2) Issues List

The following issues are addressed in Patch M (SP2):

#### Time Zones and Date Only fields

The time zone on the client was set in advance of that on the server (i.e. client was set to EST, and the server set to GMT), and a Date Only field Opportunity was created and added to the screen. This was then added to the view vMailMergeOpportunity and a mail merge was performed. However the merged date is before the date the merge was performed. This issue is now fixed. (Case ID 0-49312-QA)

#### Performance issue with .com

There was a performance issue with SageCRM.com. The issue is now fixed. (Case ID 0-54349-QA)

#### Outlook calendar event - Chinese

An error was returned when trying to synchronize an Outlook calendar event, which had Chinese characters in the subject line. The issue is now fixed. (Case ID 369-55575)

#### Foreign ID not escaped

Foreign ID was not escaped in GetChangeLogResponse, which meant code wasn't being parsed into the correct XML format. The issue is now fixed. Case ID (0-55605-QA)

#### Date/Time picker

The Date/Time picker was not working on Chinese OS. The issue is now fixed. (Case ID 328-56020)

#### Currency values missing in Quotes and Orders

When creating a new quote, the values in the currency field (drop-down list) on the New Quote screen were not listed. The same error occurred when creating a new order. The issue is now fixed. (Case ID 410-56289)



### **Export to file garbage**

Garbage was displayed on the page when exporting a found record to file in text format on a Chinese OS. The issue is now fixed. (Case ID 328-41418)

### **Incorrect territory settings for new users**

When adding a new user to an existing UK account, the new user's territory was setting to "Worldwide". This issue is now fixed. (Case ID 344-50234-QA)

### **Advanced Find SQL error**

A SQL Error (242) was returned when using Advanced Find in Groups. The issue is now fixed. (Case ID 0-51347-QA)

### **Quotes and Orders tabs missing**

The Opportunity Items tab was showing instead of the Quotes and Orders tabs on SageCRM.com. The issue is now fixed. (Case ID 0-51692-QA)

### **Mass mail issue on custom entity groups**

There was an issue when attempting to send mass e-mails from newly created custom entities that were not associated with other primary entities. The issue is now fixed. (Case ID 0-52911-QA)

### **Solo filtering on secondary entities**

The option to add/remove custom secondary entities from the Solo Filter was not available when logged in as a non-admin user. The issue is now fixed. (Case ID 255-54661-QA)

### **Extra characters in FW: and RE: E-mails (Chinese)**

E-mail replies or forwards with Chinese characters in the subject line had extra characters added to the subject after they have been filed to CRM. The issue is now fixed. (Case ID 328-55612)

### **E-mail address not populated**

E-mail from a non-customer to an e-mail manager filing address from Outlook was filed with the address "". The issue is now fixed. (Case ID 410-55834)

### **Associated person details not saved**

Associated person details were not being saved when sending mass e-mail. The issue is now fixed. (Case ID 355-55859)

### **Outlook plugin mismatch**

After installing the Outlook plugin, a plugin mismatch was displayed. The issue is now fixed. (Case ID 410-56497)

### **My Favorite Reports**

Clicking on the My Favorite Reports link caused a SQL error. The issue is now fixed. (Case ID 410-56531)

### **Date characters**

Date characters were not displaying normally in the Keyword Search panel. The issue is now fixed. (Case ID 328-41232)

### **Workflow web error (CHS)**

A web error occurred after clicking the Send to Trash button on the Workflow page (Chinese OS). The issue is now fixed. Case ID 328-41235)

### **Customizing captions**

After customizing the Find and New captions by changing their names, the Find and New drop-down lists were missing. The issue is now fixed. (Case ID 328-41273)

### **Export report error (CHS)**

An error occurred when exporting a report while logged on to CRM with a username that contained 3 or more Chinese characters. The issue is now fixed. (Case ID 328-41310)

### **DefaultValues in CRM/Outlook**

DefaultValues set at a field level CreateScript in CRM were not fired off when using CRM from Outlook. The issue is now fixed. (Case ID 0-39115-QA-ENH)

### **Change button – Marketing tab**

The Change button was missing for non-admin users when a person was selected and the Marketing tab was clicked. The issue is now fixed. (Case ID 255-45173-QA)

### **Custom template not populating correctly**

It was not possible to match the AddressBlock with CRM fields on a custom template. This is not a currently supported feature. (Case ID 255-45320-QA)

### **Key attributes in reports**

Changing the position of a key attribute in a report caused the report to fail. The issue is now fixed. (Case ID 255-45321-QA)



### **Mail merging custom entities**

It was not possible to perform a mail merge from a newly created custom entity group. The issue is now fixed. (Case ID 0-45782-QA)

### **Data order in the Campaign Summary screen**

The order of waves in the Campaign Summary screen was different depending on whether the Wave Activities were shown or hidden. The issue is now fixed. (Case ID 0-47754-QA)

### **Master CRM information different to information on install**

The information in Master CRM differed to that in a customer install. The issue is now fixed. (Case ID 0-47866-QA)

### **Unable to search for transferred report**

It was not possible to navigate to a report that had been transferred from one category to another. The issue is now fixed. (Case ID 0-48656-QA)

### **AddressBoxLong**

Adding additional fields to AddressBoxLong broke the fix for case 0-42759-QA. The issue is now fixed. (Case ID 0-50467-QA)

### **Excluded records imported**

When adding records to a group, some records that were marked to be excluded were imported. The issue is now fixed. (Case ID 0-52450-QA)

### **Empty static group**

A newly created empty static group could not be found when searched for. The issue is now fixed. (Case ID 0-52446-QA)

### **Required Fields in outbound call list**

Required Fields were being ignored in an outbound call list. The issue is now fixed. (Case ID 0-52605-QA)

### **Historical type report**

It was not possible for a non-admin user to run a Historical type report. The issue is now fixed. (Case ID 0-52689-QA)



### **Automatic naming of Word documents**

Newly created Word documents based on a new local template are named with random numbers instead of having the system time and date as the default name. This is by design. (Case ID 0-52478-QA)

### **SQL error for Save As on Adv Find group**

A SQL error was returned when doing a Save As on an Advanced Find group when the regional settings had the decimal place set to comma character. The issue is now fixed. (Case ID 237-54557)

### **Patch 6.0k issue**

Applying patch 6.0k removed all reports from the My Favourite Reports category. The issue is now fixed. (Case ID 0-54638-QA)

### **Group lists exported twice**

Group lists were exported twice to the same document when using the Export to File function with patches 6.0j and 6.0k applied. The issue is now fixed. (Case ID 0-54716-QA)

### **Blank thousand separator**

Even though the thousand separator field was set to blank in My CRM | Preferences, the integer field still used a comma as a thousand separator. The issue is now fixed. (Case ID 0-55067-QA)

### **Users missing when scheduling appointment**

When scheduling an appointment for multiple users, only one user was visible on the list of users. The issue is now fixed. (Case ID 0-55123-QA)

## Patch L

**Released:** January 2008

**Files Included:** eWare DLL version 6.0.0.13, Outlook plugin 6.0.0.8, and Document plugin 6.0.0.6, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch L Issues List

The following issues are addressed in Patch L:

#### Chinese outlook synchronization

Some Chinese characters were missing or replaced by question marks in e-mails created in Outlook that are filed to CRM with the language set to Chinese (Taiwan). The issue is now fixed. (Case ID 255-49011-QA)

#### Performance Degradation on SageCRM.com

Since the 6.0f hotfix, which was built to resolve licensing leakage in SageCRM.com, performance over the .com platform had degraded significantly. The issue is now fixed. (Case ID 309-49277-QA)

#### Table Scripts

Table script code - eWare.FindRecord() - that was used while synchronizing with AIS and worked fine with version 5.8 was not working in version 6.0. The issue is now fixed. (Case ID 204-44976-QA)

#### Error in French mass mail

An unexpected error was returned when attempting to send an e-mail from the Find Person screen in the French version. The issue is now fixed. (Case ID 0-38247-QA)

#### Filter criteria not being retained

Filter criteria were not being retained after originally returned records were changed and saved; subsequent searches using the same filter returned far greater numbers of records. The issue is now fixed. (Case ID 0-40608-QA)

#### Exporting Communication data to Excel

Exporting the results of a blank Communication search brought only five data fields - Date/Time, Company, Person, Action and Details – over to Excel regardless of the fields present in the originally returned list. The issue is now fixed. (Case ID 0-49895-QA)



### **Summary report broken for Sage Germany**

An error was returned when viewing the Company summary screen on de.sagecrm.com. The issue is now fixed. (Case ID 309-50564-QA)

### **Historical Report**

An error was returned when creating a historical report with home territory set to Worldwide. The issue is now fixed. (Case ID 17-50450-QA)

### **Outlook integration issues**

Outlook integration caused two issues – the user received an Access Violation error when logging off, and e-mails were not being filed correctly. The issues are now fixed. (Case ID 0-50121-QA)

### **Component Manager timeout**

Timeout errors were returned when attempting to run a large component (more than 8000 lines) using Component Manager. The issue is now fixed. (Case ID 0-48048-QA)

### **Slow SQL response times**

There were very slow response times when trying to view communications from within the Person/Company context that were created from Groups | New Email. The issue is now fixed. (Case ID 0-51471-QA)

### **CRM Installer Service**

The CRM Installer Service was stripping out unlauded characters. The issue is now fixed. (Case ID 309-53866-QA)

### **Umlauts and accented characters**

Umlauts and accented characters were being removed from company data on both fr.sagecrm.com and de.sagecrm.com when companies were signing up for trials. The issue is now fixed. (Case ID 309-54426-QA)

### **New Lead workflow**

The error message "Invalid table or view name" was returned when a user edit their New Lead workflow action rule under the Lead Workflow. ASP pages were timing out and IIS needed to be reset also. The issues are now fixed. (Case ID 0-54223-QA)

### **Umlauted characters**

Umlauted characters were stripped out from the My CRM drop-down list on an account on de.sage.com. The issue is now fixed. (Case ID 309-54938-QA)



### **New ticket creation**

A German business partner was unable to create new tickets. The issue is now fixed. (Case ID 0-37536-QA)

### **Create new company**

An access violation error when was returned when trying to create a new company. The issue is now fixed. (Case ID 355-38751)

### **Reallocate Calls from User**

When an outbound call list containing more than one person was set up and calls were reallocated from one user to another, the Reallocate Calls from User area remained blank. The issue is now fixed (Case ID 0-40786-QA)

### **Match Rules**

It was not possible to add any new match rules in the German localized version of Sage CRM 6.0. The issue is now fixed. (Case ID 255-45030-QA)

### **Disabled users**

Disabled users were showing on the My CRM For drop-down list on the My CRM | Calendar screen; they should not be visible. The issue is now fixed. (Case ID 0-46954-QA)

### **Static Groups**

When the details of a static group were updated, the content of the group was refreshed without a warning message popping up. The issue is now fixed. (Case ID 0-47474-QA)

### **New Case on hosting**

There was no Team drop-down list on the New Case screen when trying to create a case from Team CRM on hosting. The same was true when trying to create a case from MyCRM | Cases | New case. The issue is now fixed. (Case ID 261-39690-QA)

### **Integers in reports**

When exporting a report to Excel, certain figures were not displaying correctly, even though the onscreen and CSV versions of the exported file were displaying correctly. The issue is now fixed. (Case ID 0-49928-QA)

### **Converting leads**

A user with no rights to create companies received an error message when attempting to convert a lead. The issue is now fixed. (Case ID 0-49119-QA)



### **Save Search**

An error was returned when attempting to save a newly created search. The issue is now fixed. (Case ID 261-52030)

### **E-mail escalation**

E-mails that should have been sent under customized e-mail escalation rules were not being sent. The issue is now fixed. (Case ID 0-52258-QA)

### **Solo Client/Opportunities**

On a German install, opportunities created on the server were not synching to the Solo client, and opportunities created on the Solo client weren't synching to the server. The issue is now fixed. (Case ID 0-52121-QA)

### **Product price**

Product price was not appearing on screen after the price was saved. The issue is now fixed. (Case ID 0-53317-QA)

### **Group details**

An unexpected warning message popped up when attempting to alter static group details. The issue is now fixed. (Case ID 355-54605)

## Patch K

**Released:** January 2008

**Files Included:** eWare DLL version 6.0.0.12, Outlook plugin 6.0.0.8, and Document plugin 6.0.0.6, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch K Issues List

The following issues are addressed in Patch K:

#### Right-click menu

The right-click menu was not UTF8 enabled so some Chinese characters were showing up as question marks. The issue is now fixed. (Case ID 328-41283)

#### New Report error

An error was returned when a column that contains an odd number of Chinese characters was selected on the "Report Options, Step 1 of 2" page in the New Report wizard. The issue is now fixed. (Case ID 328-41314)

#### SQL error

A SQL error was returned when a new search containing an odd number of Chinese characters was saved. The issue is now fixed. (Case ID 328-41399)

#### Saving a new dashboard

The error "FailedToSaveSetup" occurred when saving a new dashboard. The issue is now fixed. (Case ID 328-40973)

#### Group hyperlink on Solo

An unexpected event occurred when any Group hyperlink was clicked in the CRM Solo client. The issue is now fixed. (Case ID 328-40978)

#### Continue button disappears

The Continue button disappeared from the User Details page disappeared after information on a new user was updated in Open Administration | Users | New User. The issue is now fixed. (Case ID 328-41128)

#### Error installing CRM to a localized path

The user was prompted to reset IIS when attempting to install CRM to a localized path (Chinese). The issue is now fixed. (Case ID 328-41264)

### **Find button**

The Find button on the Merge Person tab of the Person Summary screen was now working. The issue is now fixed. (Case ID 328-41277)

### **Missing Person categories**

Some Person categories were missing from the Field Name drop-down list on the Advanced Find page. The issue is now fixed. (Case ID 328-41280)

### **Data upload error**

An error occurred when uploading a CSV file with a Chinese filename on the Data Upload page. The issue is fixed. (Case ID 328-41281)

### **New Person table script**

There was a problem creating a new Person table script with an odd number of Chinese characters in the script name. The issue is now fixed. (Case ID 328-41316)

### **Exporting text from Company find**

Garbage was displayed when information was exported in text format from the Company find screen. The issue is now fixed. (Case ID 328-41418)

### **Chinese characters not displaying after sync**

Chinese characters were not displaying correctly after a sync of emails from Outlook to CRM. The issue is now fixed. (Case ID 0-49811-QA)

### **CRM uninstall issue**

CRM could not be uninstalled when the installed path contained any localized characters. The issue is now fixed. (Case ID 330-54109)

### **Could not install patches**

Patches j and k could not be installed on a Chinese CRM instance when the CRM install directory contained localized characters. The issue is now fixed. (Case ID 330-54110)

### **Email Subject Line**

Emails dropped into SageCRM from Outlook that contained simplified and traditional Chinese characters on the Subject line were not displaying correctly. The issue is now fixed. (Case ID 328-52549)

## Patch J

**Released:** January 2008

**Files Included:** eWare DLL version 6.0.0.11, Outlook plugin 6.0.0.8, and Document plugin 6.0.0.6, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch J Issues List

The following issues are addressed in Patch J:

#### SQL Injection hole

There was a SQL Injection hole in Admin | Views. The issue is now fixed. (Case ID 66-48083)

#### FailedToSaveSetup

The error "FailedToSaveSetup" occurred when saving a new dashboard. The issue is now fixed. (Case ID 328-40973)

#### E-mail template

When adding an attachment with Chinese characters in the name to an e-mail template, the name of the attachment is displayed as garbage and is unable to be opened in E-mail template page. The issue is now fixed. (Case ID 328-41135)

#### Document drop

An error occurred when performing a document drop in the Communications tab of the Person entity. The issue is now fixed. (Case ID 328-41234)

#### Data upload

An error occurred when uploading a CSV file with a Chinese name on the Data Upload page. The issue is now fixed. (Case ID 328-41281)

#### Advanced Find

An error occurred when clicking the Add To Group button on the Advanced Find page. The issue is now fixed. (Case ID 328-41282)

#### Master CRM

Master CRM was failing to report license increments or decrements correctly. The issue is now fixed. (Case ID 338-48001-QA)

### **MultiSelect Field**

Two new fields - comp\_checkbox (of type "CheckBox") and comp\_headoffice (of type "search select advanced") - were created and placed on the CompanyBoxLong screen. The same fields were created in Administration | Customization | Lead and placed on the LeadCompanyScreen screen. A new lead was then created, the lead\_companycheckbox was checked, and a value for lead\_companyheadoffice was returned. However, when attempting to create the company from the lead, the fields comp\_checkbox and comp\_headoffice were empty. The issue is now fixed. (Case ID 255-47914-QA)

### **Solo Upgrade**

A user logged in after upgrading Solo from 5.8 to 6.0 and initiated a sync, and all data synchronized again – including data that had previously been synchronized. The issue is now fixed. (Case ID 0-46031-QA)

### **ERP product Synchronization**

ERP product synchronization failed with quote character (') in the string. The issue is now fixed. (Case ID 0-47738-QA)

### **Solo Sync - German**

A sync was completed but no opportunities appeared on the Solo client. However, after logging on to the server and changing and saving an opportunity the record appeared in Solo after another sync. The issue is now fixed. (Case ID 367-51560-QA)

### **Advanced Search Select**

Advanced Search Select did not work as expected after upgrading to version 6.0 from 5.80. The issue is now fixed. (Case ID 0-51891-QA)

### **Summary Report**

When logged into CRM with a Chinese username on a Chinese install, an error was returned when the Summary Report action button was clicked the in Cases and Opportunities tabs. The issue is now fixed. (Case ID 328-52499)

### **Numeric fields - French**

A SQL error occurred when attempting to re-create the snapshot on a specific table using numeric fields. The issue is now fixed. (Case ID 0-49152-QA)

### **Case Duration values**

When an SLA was set up for cases, the report brought up incorrect values for Case Duration. The issue is now fixed. (Case ID 0-41302-QA)

### **New E-mail template**

A new e-mail template containing HTML code for accented characters was created and saved. However, when the same template was opened again, all of the accented characters had been stripped out. The issue is now fixed. (Case ID 309-42183-QA)

### **Custom Entity Continue button**

The Continue button was not working when clicked in an e-mail in a newly created custom entity. The issue is now fixed. (Case ID 0-47373-QA)

### **Case Progress screen**

Customizing the Case Progress screen by adding "Case Progress: Duration" returned an Unexpected Event error when trying to open up another case. The issue is now fixed (Case ID 0-47677-QA)

### **Converting a lead to an opportunity**

An unexpected event occurred when converting a lead to an opportunity and then adding a person. The issue is now fixed. (Case ID 0-47929-QA)

### **Merge Person issue**

A new primary entity was created as a child of Person and Company. A new person and a new company were then created and their information merged into existing person and company data. However, the Merge Person feature deleted the new source data. The issue is now fixed. (Case ID 0-47811-QA)

### **Advanced Search Select**

There was an issue searching for updated data using Advanced Search Select. The issue is now fixed. (Case ID 0-48505-QA)

### **Private Communications show on Quick Look tab**

Non-admin users could use the Quick Look tab to see private tasks and appointments set by admin. The issue is now fixed. (Case ID 0-48579-QA)

### **Missing report in Report | My Favorites**

A report was edited and saved to the My Favourites category. However, the changed report was missing when searched for in the Report | My Favorites category. The issue is now fixed. (Case ID 0-48656-QA)



### **Synchronising Chinese tasks**

There was an issue with synchronising Chinese tasks between Sage CRM and Outlook 2003. The issue is now fixed. (Case ID 255-49013-QA)

### **Adding blocks to the Dashboard**

An error was returned when trying to add Today and Upcoming Tasks blocks to the Dashboard in an Oracle environment. The issue is now fixed. (Case ID 0-50653-QA)

### **Extra space in Billing and Shipping address**

When a Quote is converted to an Order, the company's address is automatically transferred to the Billing and Shipping multi-text fields, but with an extra space. The issue is now fixed. (Case ID 0-50757-QA)

### **Oracle performance issue**

It was taking a long time to load the Calendar in My CRM when running CRM on an Oracle database. The issue is now fixed. (Case ID 0-49899-QA)

### **Appointment reminder**

Appointment reminder details weren't updating after the appointment was edited. The issue is now fixed. (Case ID 0-52306-QA)

### **Currency grid error**

With the decimal place set to be a comma in the multicurrency setting, if you edit the GBP currency exchange rate to be 1,5 instead of 1,0, a NAN error displayed in the currency grid. The issue is now fixed. (Case ID 237-52946)

### **Number format warning**

The value 123,45 was displayed as 123.45 after the Workflow Action "Verkauft" (Sold) was clicked, so that in order to save the associated opportunity, the user must change the decimal point back to a comma or receive a number format warning. The issue is now fixed. (Case ID 237-52877)

## Patch I

**Released:** 11 December 2007

**Files Included:** eWare DLL version 6.0.0.10, Outlook plugin 6.0.0.8, and Document plugin 6.0.0.6, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch I Issues List

The following issues are addressed in Patch I:

#### File E-mail

There was an issue with CRM's File E-mail function - e-mail was not being filed into CRM and an error message was returned. The issue is now fixed. (Case ID 0-36087-QA)

#### Custom Saved Searches

Custom Saved Searches were not working in the Sage CRM dashboard. The issue is now fixed. (Case ID 0-39844-QA)

#### CRM Outlook plugin

After installing the CRM Outlook plugin, attachments sent in e-mails from Outlook to Outlook Express were either lost or converted to a file called winmail.dat. The issue is now fixed. (Case ID 0-40652-QA)

#### Activity Table

The Activity Table was not logging time users other than the administrator spent logged in to the CRM system. The issue is now fixed. (Case ID 309-44998-QA)

#### Expired password

A user's CRM password expired and they tried to log in to the Outlook plug in, but they were given the error message: "The CRM server returned an unexpected response. Please make sure your install name is correct". The issue is now fixed. (Case ID 0-47146-QA)

#### Sync on appointments

Sync was not working on appointments with no data in the Details field. The issue is now fixed. (Case ID 0-47221-QA)

#### SQL statements

Changed SQL statements could not be saved under tab group. The issue is now fixed. (Case ID 0-47298-QA)



### **Document Drop**

Outlook attachments could not be copied and pasted using Document Drop. The issue is now fixed. (Case ID 0-46331-QA)

### **Field Name limits**

Field Name limits were not working correctly. The issue is now fixed. (Case ID 0-47691-QA)

### **Shared documents**

Security for shared documents was not working correctly - users could see documents they had no rights to. The issue is now fixed. (Case ID 0-47874-QA)

### **Campaign summary data**

Data was ordered differently in Campaign Summary screens. The issue is now fixed. (Case ID 0-47754-QA)

### **Mass update**

Mass update was not updating multi-select fields correctly. The issue is now fixed. (Case ID 0-47749-QA)

### **Read-only communications**

A Save button was appearing on some read-only communications. The issue is now fixed. (Case ID 0-44908-QA)

### **Escalation Rule in workflow**

Escalation Rule within a workflow was not working. The issue is now fixed. (Case ID 255-49064-QA)

### **Work flow 'Send Email'**

There was an issue using case workflow to send an e-mail to an assigned user using the e-mail address #case\_assigneduserid#. The issue is now fixed. (Case ID 0-49819-QA)

### **Opportunities**

There were several issues on the Opportunities tab in My CRM - the Pipeline graphic did not function properly, the user needed to click the filter button for the default Opportunities list to display, and filtering the Opportunities list did not work using the pipeline graphic. These issues are now fixed. (Case ID 0-51113-QA)



### **Solo issues**

There were a couple of issues with Solo - a SQL error was returned after a new Lead was created and the error "Field Pers\_fullname not found" was returned when searching for a related person on the custom Relation tab. These issues are now fixed. (Case ID 0-50705-QA)

### **E-mail arrows**

The To: , Cc: , and Bcc: arrows were available and functioning in sent e-mails. The issue is now fixed. (Case ID 332-52016)

### **E-mail filed against attachment name**

E-mail was being filed against the name of an attached file rather than the customer it was originally sent from. The issue is now fixed. (Case ID 332-52962)

### **Document Drop**

An error occurred when a Document Drop was performed in the Communications tab of the Person entity. The issue is now fixed. (Case ID 328-41234)

### **Solo sync**

The Solo Client was not syncing all records. The issue is now fixed. (Case ID 367-51560-QA)

### **Filter information**

Filter information was saved incorrectly. This issue is now fixed. (Case ID 355-53089)

## Patch H

**Released:** 04 December 2007

**Files Included:** eWare DLL version 6.0.0.9, Outlook plugin 6.0.0.7, and Document plugin 6.0.0.5, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch H Issues List

The following issues are addressed in Patch H:

#### Record locking

A customer was having trouble with locking records in CRM MME. The issue is fixed. (Case ID 0-39373-QA)

#### Advanced Search queries

The Advanced Find drop-down menu displayed garbage and an error was returned after some Advanced Search queries were created. The issue is fixed. (Case ID 187-39629)

#### E-mail attachments lost

E-mail attachments were lost when the recipient e-mail address was not located in CRM. The issue is now fixed. (Case ID 255-43543-QA)

#### Key Attributes in Reports

An error was returned when using Key Attributes in Reports. The issue is now fixed. (Case ID 289-45112-QA)

#### Solo client and custom pages

Some custom ASP pages were not being transferred to the Solo client during synchronization. The issue is fixed. (Case ID 255-45190-QA)

#### Merge territories

An "unexpected event has occurred" error message was returned when trying to merge territories. The issue is fixed. (Case ID 255-45289-QA)



### **Hosted user licenses**

On a hosted account with two licenses with one user logged into CRM via Outlook, and the second user received the following error message: "Permitted number of user licenses exceeded". The issue is now fixed. (Case ID 255-45338-QA)

### **Invalid merge field**

An "invalid merge field" error was returned. The issue is now fixed. (Case ID 0-45506-QA)

### **SMTP authentication and e-mail aliases**

E-mail would not send when logged on as Admin and attempting to send an e-mail using an aliased address. The issue is now fixed. (Case ID 255-45586-QA)

### **Mail merge**

A SQL error was returned when attempting a mail merge. The issue is fixed. (Case ID 255-45500-QA)

### **HTML e-mails**

E-mail created from a template with attachments and sent from CRM using the mail client, is received in Outlook as a blank e-mail with the body text in an HTML attachment. The issue is fixed. (Case ID 0-45743-QA)

### **CRM/ERP Integration and Solo**

Company records on the Solo client side could not be viewed in a SageCRM/Sage Accpac ERP Integrated environment. The issue is now fixed. (Case ID 0-45591-QA)

### **Issue with eWareEmailManager authentication**

There was a problem with eWareEmailManager authentication. Sending out auto response with SMTP authentication caused a "Sender address rejected: not logged in" error. The issue is fixed. (Case ID 255-45977-QA)

### **Export to Word**

The Export to Word function was not working correctly. The issue is now fixed. (Case ID 0-46300-QA)

### **Scroll bars disappear - German**

German issue: Scroll bars disappeared after a new Task or Appointment was created and the Time Calendar Icon was clicked. The issue is now fixed. (Case ID 0-46527-QA)



### **Workflow action buttons**

Workflow action buttons were not appearing when a user was assigned a new opportunity. The issue is now fixed. (Case ID 0-48005-QA)

### **Report results change**

Report results changed depending on the value of the date only field. The issue is fixed. (Case ID 0-48480-QA)

### **Dashboards wouldn't print**

Standard CRM dashboards would not print correctly. The issue is now fixed. (Case ID 204-51055-QA)

### **E-mail Territory**

There was an issue with the E-mail Territory value. The issue is now fixed. (Case ID 355-52158)

### **Buy Now**

Clicking on the Buy Now hyperlink returned an error. The issue is now fixed. (Case ID 0-42871-QA)

### **Permissions on custom entities**

CRM appeared to ignore the security model for permissions on custom entities. The issue is now fixed. (Case ID 0-42113-QA)

### **Key Attribute Data**

A SQL Code error was returned when trying to use Key Attribute Data. The issue is now fixed. (Case ID 255-45351-QA)

### **Communications.js**

An issue occurred when e-mail manager used the communications.js to send e-mails with attachments. The e-mails were not getting stored under the correct customised library location. The issue is fixed. (Case ID 0-44449-QA)

### **External Oracle 9i DB**

There was an issue trying to connect to an external Oracle 9i database. The issue is now fixed. (Case ID 0-46773-QA)



### **Outlook plugin issue**

Chinese characters became corrupted in the subject heading of an e-mail filed to CRM after synchronization with Outlook. The issue is now fixed. (Case ID 255-47369-QA)

### **Synchronization error**

An access violation and server error were returned during synchronization. The issue is now fixed. (Case ID 0-50113-QA)

### **Solo password issue**

In an Oracle installation of Sage CRM, a user couldn't log on to Solo after setting a password on his account. The issue is now fixed. (Case ID 0-52007-QA)

### **Mass e-mail**

A mass e-mail that was created was not displayed on the Company Communication tab. The issue is now fixed. (Case ID 355-52553)

### **Mass e-mail**

The error message "An unexpected event has occurred: Exception: field Comp\_EmailAddress not found" was displayed when trying to send a mass e-mail when logged in as admin. The issue is now fixed. (Case ID 355-52551)

## Patch G

**Released:** 01 November 2007

**Files Included:** eWare DLL version 6.0.0.8, Outlook plugin 6.0.0.6, and Document plugin 6.0.0.4, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch G Issues List

The following issues are addressed in Patch G:

#### **Solo client record creation**

Records could not be created on the Solo client. This issue is fixed. (Case ID 135-51127)

#### **Field creation**

It was taking an unusually long time to create a field under Company on a hosted account. The issue is fixed. (Case ID 0-42254-QA)

#### **Outlook appointments**

Appointments were not being copied over from Outlook to CRM. This issue is fixed. (Case ID 255-45348-QA)

#### **Solo Company**

An unexpected error was returned when saving a Solo Company. This issue is fixed. (Case ID 0-46027-QA)

#### **Accpac ERP integration pages**

There was a problem working with Accpac ERP integration pages. After working with the integrated pages for a short period, navigating to the Aging and Statistics tab and selecting Year or Period in the Document Totals area, a "catastrophic failure" error was returned. The issue is fixed. (Case ID 338-50209, 338-50209-QA)

## Patch F

**Released:** 04 October, 2007.

**Files Included:** eWare DLL version 6.0.0.7, Outlook plugin 6.0.0.6, and Document plugin 6.0.0.4, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch F Issues List

The following issues are addressed in Patch F:

#### MasterCRM

MasterCRM was not reflecting changes made in the users account. This issue is fixed. (Case ID 344-48000-QA)

#### Solo client

Sync would not run after the French Solo client was installed. This issue is fixed. (Case ID 328-48384)

#### Legal text

The following text needed to be added on a new line in the existing *About CRM* popup window for legal reasons: Keyword Search Powered by dtSearch®, www.dtsearch.com. This issue is fixed. (Case ID 11-48902)

#### Appointment details

When logged in as admin, updated appointment details were not saving in the CRM Calendar. This issue is fixed. (Case ID 355-49488)

#### Trial licence

When logged on to a Hosted Account on the v6.0 Test Environment, there was no warning message to indicate that the account was using a trial licence. This issue is fixed (Case ID 309-38674-QA)

#### Save Search

Adding Save Search functionality on Sage 1000 Product Find returned a SQL error. This issue is fixed. (Case ID 0-39461-QA)

#### Outlook plugin

There was an issue logging into the Outlook plugin when running Solo on a machine that did not have IIS installed. This issue is fixed (Case ID 0-42433-QA)

### **CRM E-mail Manager**

The CRM E-mail Manager service stopped running scripts upon receipt of a 'bad' e-mail. This issue is fixed. (Case ID 0-41667-QA)

### **HTML e-mails sent as attachment**

The body of HTML e-mails was being sent as an attachment. This issue is fixed. (Case ID 0-43517-QA)

### **User Resource settings**

User 'Resource' settings cannot be switched to 'False' after first being changed to 'True'. The field becomes read only. This issue is fixed. (Case ID 0-44896-QA)

### **German special characters in e-mail**

If an email with German special characters is forwarded, the original email is sent as an attachment embedded in an empty e-mail. This issue is fixed. (Case ID 255-45110-QA)

### **German special characters**

There was an issue filing documents with German special characters. This issue is fixed. (Case ID 255-45317-QA)

### **'Uneven size in DecodeToStream'**

An 'Uneven size in DecodeToStream' error was recorded in the CRM e-mail manager service log, which caused the CRM e-mail manager service to stop. This issue is fixed. (Case ID 0-46039-QA)

### **Outlook plugin/Integer Overflow**

An Outlook plugin/Integer Overflow error occurred on a localized German 6.0d build on German Windows Server 2003 with German OTL 2003. This issue is fixed. (Case ID 0-44649-QA)

### **'Unexpected error' when saving a Solo company**

An 'unexpected error' occurred when saving a Solo company. This issue is fixed. (Case ID 0-46027-QA)

### **Opportunity History table**

No records were being inserted into the Opportunity History table when the "Fiscal Year Start Month" was set to anything other than "January". This issue is fixed. (Case ID 0-47140-QA)

### **ASS with Mail Merge**

A SQL error occurred when using Advanced Search Select with Mail Merge. This issue is fixed. (Case ID 0-47822-QA)



### **Multiple databases**

There was an issue when using multiple databases on one server where the dataset remained the same when switching between the databases. This issue is fixed. (Case ID 0-47919-QA)

### **Cross-site scripting vulnerability**

There was a security issue with cross-site scripting vulnerability on the logon screen. This issue is fixed. (Case ID 11-48056)

### **L500 views using MME v6.0e**

There was an issue changing any L500 views using MME v6.0e. This issue is fixed. (Case ID 204-47976-QA)

### **CSMaster**

There was an issue linking to a 3rd party database called CSMaster. This issue is fixed. (Case ID 204-48084-QA)

### **Global templates**

There was a mail merge issue when using global templates. This issue is fixed. (Case ID 103-48910)

### **Response type value**

The response type value was not saved after creating an outbound call wave activity and setting up a response type list - "Good", "Bad", "Indifferent", "None". This issue is fixed. (Case ID 355-49459)

### **Modify Email screen**

Incorrect territories displayed on the Modify Email screen when a user was created with access to territory "Europe". This issue is fixed. (Case ID 355-49465)

### **Save Search**

Adding Save Search functionality on Sage 1000 Product Find returned a SQL error. This issue is fixed. (Case ID 0-39461)

### **Recurring appointment dates**

Changing recurring appointment dates deleted individual updated notes. This issue is fixed. (Case ID 0-40072-QA)

### **E-mail reminders sent prematurely**

E-mail reminders were being sent immediately, even if programmed to for some time on the future. This issue is fixed. (Case ID 0-41260-QA)



### **E-mail subject and body deleted**

E-mail subject and body were being deleted when adding Global Documents. This issue is fixed. (Case ID 0-42639-QA)

### **CreateScript on 'AddressBoxLong'**

The following CreateScript on 'AddressBoxLong'

```
if (CurrentUser.user_primarychannelid != 7)
Hidden = true;
```

caused the resultant pop-up window to remain open. This issue is fixed. (Case ID 0-42759-QA)

### **Company Documents**

Items disappeared from Company Documents after records were resaved. This issue is fixed. (Case ID 0-44921-QA)

### **Mail merge and Word 2002**

Standard mail merge would not work working when Word 2002 is installed. This issue is fixed. (Case ID 103-47250)

### **Synching delays**

Client experienced delays when synching 8,000+ contacts between Sage CRM and Outlook. This issue is fixed. (Case ID 368-47897)

### **Outlook Plugin**

Outlook Plugin crashed on every third communication. This issue is fixed. (Case ID 368-47898)

### **Splash screen after logon**

User was directed to the splash screen instead of the Quick Start page after installing the French product. This issue is fixed. (Case ID 328-48511)

### **Escalation rule in French**

It was not possible to create an escalation rule directly in the service level agreement summary (Administration | System | Timings), if the user language was set to French. This issue is fixed. (Case ID 0-48164-QA)

## Patch E

**Released:** 20 August, 2007.

**Files Included:** eWare DLL version 6.0.0.6, Outlook plugin 6.0.0.5, and Document plugin 6.0.0.3, and CTI Plugin 6.0.0.2

**Issues Addressed:** Various issues, none major.

### Patch E Issues List

The following issues are addressed in Patch E:

#### **Outlook Plugin - Chinese (Hong Kong S.A.R.)**

Outlook Plugin issues were occurring with Chinese (Hong Kong S.A.R.) characters. The issues are fixed. (Case ID 0-43104-QA)

#### **Lead Communications – SageCRM.com**

An error was occurring having created a Lead Communication and then creating a follow-up task. The issue is fixed. (Case ID 0-40485-QA)

#### **SQL Conditions on Custom Tabs – SageCRM.com**

When SQL conditions were added to custom tabs on SageCRM.com, they were not running. The issue is fixed. (Case ID 0-40113-QA)

#### **Reports – Time Zones**

Incorrect dates were being displayed when a Company Report was run which included a Date Only field. The dates appeared incorrectly depending on the time zone of the user running the report. (Case ID 0-42322-QA)

#### **Territory Rebalance**

An access violation error was being displayed when performing a Territory Rebalance. The issue is fixed. (Case ID 309-44833-QA)

#### **Table Connection Settings –Upgrading to 6.0**

Problems were occurring when logging on having upgraded to 6.0. The issue was due to information added to the Description Field field when creating a new table connection. Users need to be cautious when entering a value in this field. The field is used to specify the name of the description field within the table. If this field is completed, a field of this name will be created in the table, and on loading CRM a translation family for that table will be created where each record will become a caption. The translation family may then be used as a lookup for a selection field. If the table contains a large number of records (an approximate limit is 1,000), CRM may timeout when loading. Therefore, if it is not being used, the field value should be deleted before upgrading. The field is documented in the *6.0 Developer Guide*. (Case ID 0-41491-QA)

#### **ASS Fields - External Databases**



An SQL error was occurring when Advanced Search Select fields were added to a grid in order to search an external database. The issue is fixed. (Case ID 65-44850)

### **Advanced Search Select Fields**

Problems were occurring with the Advanced Search Select field when performing a Person merge (Source field). The issue is fixed. (Case ID 0-40336-QA)

### **Outlook Plugin – Chinese Characters**

Chinese characters were being corrupted during Outlook Synchronization. The issue is fixed. (Case ID 0-42041-QA)

### **Accessing New Companies**

An access violation was occurring when trying to access a newly created company. IIS needed to be reset to open the company record. The issue is fixed. (Case ID 355-38751)

### **Onscreen Notifications**

Onscreen notifications were not disappearing when Snooze or Dismiss was selected. Onscreen notifications are now hidden. (Case ID 353-40042)

### **Line Items - Oracle**

An Ore error was occurring when adding Line Items to a Quote or Order on an Oracle 10g system. The issue is fixed. (Case ID 92-46163)

### **Advanced Find**

An access violation was occurring with advanced finds. The issue is fixed. (Case ID 355-46216)

### **Mail Merge – SageCRM.com**

During a mail merge, the eWareMerge0.dat file was being created in the "C:Temp" folder instead of in "C:\Documents and Settings\\Local Settings\Temp". The issue is fixed. (Case ID 338-45410-QA)

### **Quick Start Tab – Solo**

My CRM | Quick Start Tab removed from Solo Client. (164-39242)

## Patch D

**Released:** 04 July, 2007.

**Files Included:** eWare DLL version 6.0.0.5, Outlook plugin 6.0.0.4, and Document plugin 6.0.0.2.

**Issues Addressed:** Various issues, none major.

### Patch D Issues List

The following issues are addressed in Patch D:

#### **Cannot Create New Match Rules (Chinese OS)**

Error message "No Match Rule detected" when try to create a new match rule in Chinese OS. This issue is fixed. (Case ID 328-41083)

#### **SQL Error when creating Leads, Opportunities, or Cases**

An SQL error, "An unexpected event has occurred: Exception: SqlError" was displayed when trying to create a new Lead, Opportunity or Case. This issue is fixed. (Case ID 355-43468)

#### **DB2 Errors**

Errors were occurring when editing or updating Companies, and the vListCommunicationLead was not created correctly under DB2. This issue is fixed. (Case ID 210-41675)

#### **Error on Solo Client Install**

Error occurred when installing Solo Client. Installation could not be completed. The trial license was out of date and Solo was not being downloaded. This issue is fixed. (Case ID 328-41895)

#### **SQL Error when Synchronizing Outlook from Solo Client**

The initial synchronization between Outlook and CRM, when carried out from the Solo Client, produced an SQL error. This issue is fixed. (Case ID 0-42467-QA)

#### **Cannot attach Global Documents to E-mail Out in Solo**

Attaching a global document to an E-mail Out action on the Solo Client produced an error, "an unexpected event has occurred". This issue is fixed. (Case ID 0-42602-QA)

#### **Error on Solo Client**

After installing the solo client, the following error is produced when attempting to launch the client: "Please Get The Latest LogonTranslations.Txt File". This issue is fixed. (Case ID 0-41767)

#### **Send Anyway button appearing when Send Yourself a Test E-mail**

The Send Anyway button was appearing during the Send Yourself a Test E-mail process. This issue is fixed. (Case ID 0-40395-QA)

#### **Incorrect CAB File when Solo Installed**

A Version Mismatch error was being generated when installing integration from the Outlook Client. This issue is fixed. (Case ID 0-42531-QA)



### **SageCRM.com not Synchronizing Outlook Deletions**

When an Appointment was deleted from Outlook and synchronized, the appointment was not deleted from CRM. This issue is fixed. (Case ID 0-40140-QA)

### **Solo Client and Numeric Fields**

Errors generated when new numeric and currency fields were added to the Company table, and the Solo Client then synchronized. This issue is fixed. (Case ID 0-41152-QA)

### **SQL Error during Mass Update of Check Box Field**

Carrying out a mass update of a check box type field generated an SQL error. This issue is fixed. (Case ID 0-40514-QA)

### **Installing 6.0 SP1 on Oracle 9i R2**

Error generated, "UnableToConnectToDB: OAR-12154: TNS:could not resolve service", when installing 6.0 SP1 on Oracle 9i R2. This issue is fixed. (Case ID 0-42136-QA)

### **Invalid SQL when selecting Company Record**

An Unexpected Error was generated when selecting a company record. This issue is fixed. (Case ID 0-40259-QA)

### **Data Upload: Notes Data Truncated**

A String Truncated warning is displayed when uploading large Notes. The message, Max Length: 2000, is added to the Data Upload Log Files. This issue is fixed. (Case ID 0-40774-QA)

### **Outlook crashes after using another User's Calendar**

Outlook crashes after viewing another User's calendar in Outlook (2000) when the CRM Outlook Integration Plugin is installed. This issue is fixed. (Case ID 0-42590-QA)

### **Error Adding Line Items to Quotes in Solo**

SQL Error generated "An unexpected event has occurred: Exception: SQLException" when adding a line item to a Quote on a Solo system. This issue is fixed. (Case ID 0-41257-QA)

### **Lead Sequences on DB2**

Problems were occurring when with sequences for the Lead and LeadProgress tables on DB2 systems, resulting in difficulties creating and updating Leads. This issue is fixed. (Case ID 0-41156-QA)

### **SageCRM.com Upgrades and Outlook Integration**

Outlook 2002 Integration was not functioning following the SageCRM.com upgrade to version 6.0. This issue is fixed. (Case ID 0-40421-QA)

### **Opening Outlook Calendars when Integrated with CRM**

Outlook was crashing having installed CRM Outlook Integration and opening another user's Outlook 2000 Calendar. This issue is fixed. (Case ID 0-42590-QA-ENH)

### **Advanced Find SQL Error on DB2**

An SQL error was occurring with Advanced Find when specifying the <Entity> Details field to search for a Lead, Opportunity, or Solution on a DB2 system. This issue is fixed. (Case ID 353-39402)

### **Moving Territories on Solo**



Error generated, "An unexpected event has occurred: Exception: File '\\gs-sql-ecrm-2\root-m\CRM\Library\SV\SageAOB2455hxizfw\SoloClient.zip" not found - Native error: 00012' when attempting to move territories on a Solo system. This issue is fixed. (Case ID 135-39874)

### **Reassigning Records when Status Field is set to None**

It was not possible to reassign a record if the Status field value on the record was set to "None". This issue is fixed. (Case ID 187-38195)

### **No Response when selecting Person Address**

The system was not responding when adding a Person to a New Company and selecting an existing address from the list of addresses. This issue is fixed. (Case ID 328-41553)

### **Create Quotes / Orders on Solo Client**

An error was occurring when trying to create a Quote or an Order on a Solo client. This issue is fixed. (Case ID 328-40979)

### **ACCPAC Custom Files not Updated**

The following three ACCPAC custom pages were not updated, accpacrm.js, accpacrm.vbs, accpacrmnolang.js, in the custom pages directory. This issue is fixed. (Case ID 210-41673)

### **Incorrect ACCPAC Upgrade Scripts**

ACCPAC ERP version 5.4 scripts were erroneously being run when upgrading from CRM 5.8 with ERP 5.2 to CRM 6.0 with ERP 5.3. This issue is fixed. (Case ID 210-41831)

### **ACCPAC Logon Screen Text Incorrect**

The word "ERP" was erroneously being displayed on the "SageCRM for Sage Accpac" Logon screen. This issue is fixed. (Case ID 210-41799)

### **Advanced Search Select Localization Issues**

Some captions were not translated in Administration | Customization | <Entity> | Fields when creating a new field and selecting Advanced Search Select as the Entry Type. This issue is fixed. (Case ID 328-41095)

### **Screen Customization Localization Issues**

Some captions were not translated on the Administration | Customization | Opportunity tabs. This issue is fixed. (Case ID 328-41096)

### **Outlook Synchronization using a PST File**

Error generated, "Operation has failed. There was an Outlook Server error. Sync has been stopped" when synchronizing using a PST file with Auto Sync switched on. This issue is fixed. (Case ID 92-38163)

### **Creating Saved Advanced Finds**

Error generated, "This name is already in use by another saved advanced find, please choose another name" having created a Saved Advanced Find and then trying to reselect it. This issue is fixed. This issue is fixed. (Case ID 187-42166)

### **Escalation Rules / Quick Notifications not sending E-mails**

Neither Escalation Rules nor Quick Notifications were sending emails, i.e. they were not being delivered to the SMTP server. This issue is fixed. (Case ID 332-42195)

### **Navigating in Outlook writing Error to Log**



An error was being written to the Log file when users selected the Outlook Calendar menu and then navigated back to CRM from Outlook. This issue is fixed. (Case ID 332-40410)

#### **Advanced Find Reports – Saved Searches**

An error was occurring when creating a Saved Search from an Advanced Find Report and adding more than 40 characters to the Save Advanced Find field. This issue is fixed. (Case ID 353-40065)

#### **Hosted CRMInstallerService and Accented Characters**

The CRMInstallerService, which provisions new accounts, was unable to handle French accented characters. This issue is fixed. (Case ID 309-41329-QA)

#### **Deleting Advanced Find Saved Searches**

Empty grids were being displayed on the Find screen when Advanced Find Saved Searches were deleted. This issue is fixed. (Case ID 187-42180)

## Patch C

**Released:** 10 May, 2007.

**Files Included:** eWare DLL version 6.0.0.4, Outlook plugin 6.0.0.3, and Document plugin 6.0.0.1.

**Issues Addressed:** Various issues, none major.

### Patch C Issues List

The following issues are addressed in Patch C:

#### **Creating a Group on a Custom Entity**

An error was occurring when creating a group on a custom entity. This issue is fixed. (Case ID 0-41288-QA)

#### **New Menu not changing to reflect Workflow Primary Rule**

When there is one workflow for an entity, the system was not changing the New menu according to the workflow primary rule. This issue cannot be reproduced and is closed. (Case ID 0-39207-QA)

#### **Error Message when using Advanced Find in Reports**

Selecting the Advanced Find checkbox when creating a report was producing an error when the report was saved. This issue is fixed. (Case ID 0-39212QA)

#### **Self Service Access Violation**

In Administration | System | Self Service, when you clicked on change, made no change, then saved, an access violation occurred. This issue is fixed. (Case ID 0-39459)

#### **Report Output sorted "By Translation" produces SQL error**

In a report that includes Group By fields, you can change the sort order to By Translation. The resulting report output was generating an SQL error. This issue is fixed. (Case ID 255-39644-QA)

#### **Send E-mail to Group or Saved Search**

An unexpected event error was occurring for non-admin users when sending an e-mail to a group or to a list of people returned from a saved search. This issue is fixed. (Case ID 0-38871-QA)

#### **Setting Field Security by Component Script**

Field Security changes are not recorded or scripted out by the Component Manager. This issue is fixed. The Field Security for the Everyone territory is now scripted out by the Component Manager. (Case ID 253-39760)

#### **Nodb setup parameter**

The "nodb" setup parameter, which allows you to install Sage CRM without a database, was not working. This issue is fixed. (Case ID 0-39286)

#### **Mass E-mail Status Message Incorrect**

The message stating how many e-mails are sent out to a group was displaying the incorrect number of e-mails. This issue is fixed. (Case ID 0-39892)



### **Advanced Find using Default Search View**

Advanced Find was using the Default Search View, not the Source View defined by the Admin user. This issue is fixed. (Case ID 0-40195-QA)

### **Upgrading from v5.7 with ERP**

SageCRM for Sage Accpac: Going from CRM v5.7 with ERP v5.3 to CRM v6.0 with ERP v5.4 was producing an error in Sage Accpac Administration. This issue is fixed. (Case ID 210-41682)

### **Error on Reinstalling Integration**

SageCRM for Sage Accpac: Unable to reinstall the integration. The installation stops with an error "This install is not a valid CRM install. The CRM install version must be version 6.0". This issue is fixed. (Case ID 210-41674)

### **Unable to open Companies**

SageCRM for Sage Accpac install (April 17 install): Unable to open companies. This issue is fixed. (Case ID 210-41677)

### **ERP stays at Current Version (v5.8 with ERP v5.3 to v6.0)**

SageCRM for Sage Accpac Install: Upgrade going from CRM v5.8 with ERP v5.3 to CRM v6.0, then ERP stays at its current version. This issue is fixed (Case ID: 210-41678)

### **ERP stays at Current Version (v5.8 with ERP v5.4 to v6.0)**

SageCRM for Sage Accpac Install: Upgrade going from CRM v5.8 with ERP v5.4 to CRM v6.0, then ERP stays at current version. This issue is fixed. (Case ID:210-41679)

### **Error on Upgrade Install**

For SageCRM for Sage Accpac installation: When upgrading from CRM v5.8 to CRM v6.0 there was an error on running one of the scripts (tables.es). This issue is fixed (Case ID 210-41671)

### **Name Change SageCRM for Sage Accpac**

SageCRM for Sage Accpac: Complete all name changes in install and system. This issue is fixed (Case ID 210-41669)

### **Remove one screen from Install**

SageCRM for Sage Accpac: During an upgrade installation, the first screen asking if you want to upgrade/install/install later the Sage Accpac ERP integration is not required. Go straight to the second screen which has the ERP upgrade paths. This change has been made. (Case ID 210-41670)

### **Access Violation Error on Accpac Summary Reports**

SageCRM for Sage Accpac: Get an access violation error when you run a Summary Report on any company which is integrated with Accpac. This issue is fixed (Case ID 210-41079)

### **Error editing Opportunity Item**

SageCRM for Sage Accpac: Error on opportunity item with Sage Accpac ERP v5.4. This issue is fixed. (Case ID 210-40867)

### **Task Date/Time is changed after Task creation**

Due Date/Time was reverting to created Date/Time after saving a task. This issue is fixed (Case ID 187-41695)

### **Re-enabled users allowed in system over license number**

Re-enabled users were not registering in user count. This issue is fixed. (Case ID 328-41754)



### **Solo Client Advanced Find Error**

Error generated after selecting Advanced find from drop down list of Find on Solo Client. This issue is fixed. (Case ID 328-39952)

### **DB2 Errors during Install**

Errors when installing Sage CRM 6.0 SP1 with DB2. This issue is fixed. (Case ID 210-40866)

### **Private Communication displayed in Advanced Find List**

Private Communications filter was not being applied to Advanced Find list. This issue is fixed. (Case ID 187-41848)

### **Weekly Appointment Recurrence**

Weekly appointments were not displaying correctly in Calendar View. This issue is fixed. (Case ID 319-41731)

### **Onscreen Notifications displaying early**

Onscreen notifications displaying before set interval. This issue is fixed. (Case ID 261-41665)

### **File E-mail Error in French System**

An error was generated when the Outlook File E-mail feature was used. This issue is fixed. (Case ID 328-40839)

### **Solo Client Order Error**

An error was generated when selecting New | Order on the Solo Client. This issue is fixed. (Case ID 328-40815)

### **Cannot pop up new IE windows in Outlook when using HTTPS**

For example, when creating a new appointment in sagecrm.com, selecting the Recurrence button opened a new window saying that you are not currently logged in. This issue is fixed. (Case ID 332-40200)

### **Unable to Delete a Person using Web Services**

An error occurs when trying to delete a Person using Web Services. This issue is fixed. (Case ID 261-39731)

### **Key Attribute Data displaying incorrectly**

The alignment of key attribute data in, for example, the context of a company, was incorrect. This issue is fixed. (Case ID 135-39849)

### **Type and Category Information missing from Document Summary Page**

The default selections for the type and category fields were displaying blank after saving. This issue is fixed. (Case ID 328-41023)

### **Resource User in SageCRM.com**

Resource users cannot be added without license numbers being checked. This issue is fixed. (Case ID 308-41007)

### **Reassignment from User to Team**

Reassignment of entities from a user to a team was not working correctly. This issue is fixed. (Case ID 187-39873)



### **Communication Saved Searches**

An SQL error was created when saving a Communication search. This issue is fixed. (Case ID 164-39768)

### **Solo Client and Extended Characters**

The find feature was not returning the correct results when a search was carried on the Solo Client using extended characters. This issue is fixed. (Case ID 328-40840)

### **Corrupted Character showing on System Logging Page**

In the French system, when the size of a log file reached 1000 KB, the thousand separator was getting corrupted. This issue is fixed. (Case ID 330-40843)

### **Groups Entity Translations missing**

When setting up a new Group, the Entity drop-down is not translated in different languages. This issue is fixed. (Case ID 28-39954)

### **SQL Error when running a Report**

An error was generated when running a report. This issue is fixed. (Case ID 353-40055)

### **Extended Characters in Keyword Search Configuration Screen**

Extended chars appear corrupted in the Administration | System | Keyword Search Configuration screen. This issue is fixed. (Case ID 142-40071)

### **Missing Captions on New Report Page**

The Source View drop-down was missing language translations. This issue is fixed. (Case ID 328-40929)

### **Missing Caption on Product Page**

The caption for Default was missing language translations. This issue is fixed (Case ID 328-41089)

### **NonDefaultStoreScript needs to be added manually to Registry**

To display Outlook in Vista, the NonDefaultStoreScript needed to be added manually to the registry. This issue is fixed. (Case ID 332-40397)

### **Export to CSV and Display on Screen output different**

The report output when displaying on screen is different to the report output when Export to CSV is selected. This is due a limitation of Excel's support for CSV, which cannot display control characters correctly. This cannot be fixed by Sage. (Case ID 353-40046)

### **Find Company on Self Service Visitor page**

In Administration | System | Self Service, clicking on the hyperlink of a Visitor record displays a pop-up window with Find This Company and Find This Person buttons on. These buttons were not searching correctly. These buttons are no longer required and have been removed. (Case ID 353-39533)

## Patch B

**Released:** 05 April, 2007.

**Files Included:** eWare DLL version 6.0.0.3, Outlook plugin 6.0.0.2, and Document plugin 6.0.0.1.

**Issues Addressed:** This patch is a hot fix for version 6.0 (SP1). Various issues - none major.

### Patch B Issues List

The following issues are addressed in Patch B:

#### **E-mail notification not working**

An error was occurring when adding new notification e-mail addresses for use with escalations. This issue is fixed. (Case ID 0-39733-QA)

#### **Subject line errors in CRM e-mails**

When sending e-mail from CRM the recipient was seeing unexpected characters in the subject line in both Outlook and Outlook Express. This issue is fixed. (Case ID 0-40151-QA)

#### **Advanced Search Select error**

The Advanced Search Select fields that are used for the Company/Person merge as well as the Related<entity>Lists functionality are built and populated with data on the fly. They do not physically exist in the database. These fields were not being properly populated with data. This issue is fixed. (Case ID 0-40336-QA)

#### **E-mail notifications not recognizing #case\_assigneduserid#**

E-mail notifications are not recognizing case\_assigneduserid as a valid e-mail address. This issue is fixed. (Case ID 0-40407-QA and 0-40399-QA)

## Patch A (SP 1)

**Files Included:** Complete set of installation files, including eWare DLL version 6.0.0.2 and Outlook Plugin version 6.0.0.2, Document Plugin 6.0.0.2, CTI Plugin 6.0.0.1.

**Note:** The CTI Plugin must be copied over manually.

**Issues Addressed:** This is a full service pack (Patch A (SP1)). It's possible to go straight from version 5.8 to 6.0 Patch A (SP1).

### Patch A (SP1) Issues List

The following issues are addressed in Patch A (SP1):

#### **Indexer service manual stop and restart needed**

This only applies to running the 6.0a patch on an existing 6.0 install. Prior to running the patch please Stop the Indexer service manually (via Administrative Tools> Services> CRM Indexer Service). Once the patch has run you must restart the indexer service manually - again via Administrative Tools> Services> CRM Indexer Service. (Case ID: 261-39906)

#### **Installations on DB2**

Several issues relating to installing and running version 6.0 successfully on IBM DB2 databases are now resolved. (Case ID: Various)

#### **User Activity Logs – Large installs**

The table that logs user activity table became full when tracking large installations. Issue resolved with the introduction of a new threaded class to record user logons. (Case ID: 164-38682)

#### **Upgrading from 5.7p**

Path issue preventing upgrades from 5.7p to 6.0 is now resolved. (Case ID: 332-38687)

#### **Oracle 10 database users upgrading from 5.8**

OLEDDB driver issue that generated errors when Oracle 10 database users upgraded from 5.8 to 6.0 is now resolved. (Case ID: 187-38688)

#### **Required fields in German-language installations**

Validation in German-language CRM installations failed to prevent users from saving records that featured blank required fields. This issue is now fixed. (Case ID: 330-38861)

#### **Outlook Synchronization in German-language installations**

The decimal separator used in German-language installations triggered the display of an error page during Outlook synchronization. This issue is now fixed. (Case ID 330-38986)

#### **Syncing not time zone aware**

Syncing of appointments between Sage CRM and Outlook was based on server's time zone rather than the user's time zone. This issue is fixed. (Case ID 332-39081)

#### **New task button on Find Opportunities screen**

Clicking on the New Task button (or any of the other Action buttons) available in the Find Opportunities screen triggered an error. This issue is now fixed. (Case ID: 355-39285)

#### **Keyword Search option missing**



The Keyword Search option was missing from the Find drop-down menu when the "Physical root directory for mail merged documents" location was changed in the "Documents & Reports Configuration" section. This issue is now fixed (Case ID: 353-39496)

### **Moving Territories**

When a territory was moved from one parent territory to another, the territory fields for the companies and users associated with that territory were set to none. This issue is now fixed. (Case ID: 135-39550)

### **File names for mail merge documents**

When a mail merge using a shared template was carried out, a new file name was not appended to the shared template name. This led to the overwriting of files stored in the library root folder. This case is now fixed. (Case ID: 11-39628)

### **Text in Coaching Captions**

Certain extended ASCII characters (for example, Chinese and Japanese characters as well as letters featuring diacritics) were not displaying correctly in coaching captions. This issue is now fixed. (Case ID: 261-38505 and 328-37565).