



Sage CRM

Version 6.1 Patch Release Notes

Overview

This document provides details of all Sage CRM patch releases for version 6.1. Installing the most recent 6.1 patch (R) ensures that you get all of the fixes included in earlier patches (if applicable).

Prerequisites

You need to have Sage CRM 6.1 SP1 installed before you install the latest patch. You can find out the version of Sage CRM you are running from the Logon page, which would read 'CRM version 6.1', for example.

Latest Version

Latest Release: Version 6.1 R

DII: 6.1.0.30

How to Install Sage CRM Patches

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

1. Back up the existing CRM eWare.dll and database. The DLL is stored in the CRM installation directory, which is commonly in
...\\Program Files\\Sage\\CRM\\<Installation Name>\\WWWRoot
2. Run the Setup.exe file
3. When using the InstallShield wizard, you can choose to use either Windows authentication (using the credentials of the user logged in to the system at that time) or SQL Server authentication (by entering the appropriate SQL Login ID and Password).

Patch R

Released July 30, 2010

Files included

DLL version	6.1.0.30
Outlook plugin	6.1.0.12
Document plugin	6.1.0.3
CTI plugin	6.1.0.6

Patch R Issues List

Ref ID	Area	Patch Release Notes	Patch Release Status
0-101799-QA	Customization	It was not possible to use '0' as a value in a Search Select Advanced field, the value of which is stored in the narrative code table.	This issue has been fixed. SSA fields with '0' as a value will no longer display as '-- none selected --'.
0-113694-QA	Performance / Scalability	Out of memory errors were occurring when users drilled down into orders.	Some memory leaks have been fixed around quotes/orders, so the likelihood of this error occurring has been reduced. Some work still needs to be done around customizations.
0-111026-QA	Performance / Scalability	Errors were occurring when attempting to log in to CRM - both process tab errors and general access violations.	This issue has been partially resolved. A number of changes have been made to the process tab code, which should reduce the instances of these errors occurring. However, it is not possible to back port these fixes.

Rolled Up Fixes

None.

Patch Q

Released June 15, 2010

Files included

DLL version	6.1.0.29
Outlook plugin	6.1.0.12
Document plugin	6.1.0.3
CTI plugin	6.1.0.6

Patch Q Issues List

Ref ID	Area	Description	Status
17-95831-QA	Performance / Scalability	An error occurred when using code that included the ProcessTab reference.	This issue is fixed.
0-101958-QA	Reports	After reports were exported to Excel, the excel.exe process was still listed in the task manager.	This issue is fixed.

Rolled Up Fixes

None.

Patch P

Released February 26, 2010

Files included

DLL version	6.1.0.28
Outlook plugin	6.1.0.12
Document plugin	6.1.0.3
CTI plugin	6.1.0.6

Patch P Issues List

Ref ID	Area	Description	Status
0-106047-QA	Outlook Integration	Contact web site addresses were deleted from Outlook after syncing with CRM.	This issue is fixed.
0-104227-QA	Quotes / Orders	On a German install, an error occurred when trying to convert quotes with a user whose territory was set to Worldwide.	This issue is fixed.

Rolled Up Fixes

None.

Patch O

Released December 2, 2009

Files included

DLL version	6.1.0.27
Outlook plugin	6.1.0.12
Document plugin	6.1.0.3
CTI plugin	6.1.0.6

Patch O Issues List

Ref ID	Area	Description	Status
435-99073-QA	Companies/People	In a hosted environment, when the CRM installer service parsed databases for uninstall and deleted those databases, it did not update the Comp_UpdatedDate date field.	This issue is fixed.
0-90397-QA	CTI	An error occurred intermittently on incoming calls when working with CTI.	This issue is fixed.
0-96381-QA	Customization	The system would not record any dates earlier than 01/01/1900.	This issue is fixed.
0-96152-QA	Dashboard	The wrong information was being displayed on a chart when drilled into from the dashboard.	This issue is fixed.
0-101332-QA	E-mail Client	Sent e-mails were being truncated, and only half of the e-mail was displayed to the recipient.	This issue is fixed.
0-98165-QA	Key Attribute Data	A user was not able to access a static group they previously had access to via the Key Attributes tab.	This issue is fixed.
0-95190-QA	Leads	When adding two leads for the same company with two different contacts, the second Person record was not added to the company's Person list but the Lead list showed two Lead records.	This issue is fixed.
0-95227-QA	Outlook Integration	Appointments were not syncing from Outlook to CRM.	This issue is fixed.
0-96569-QA	Outlook Integration	An SQL timeout error was returned when trying to sync contacts from CRM to Outlook.	This issue is fixed.

Ref ID	Area	Description	Status
0-93671-QA	Outlook Integration	The Folder View header was corrupted in Outlook 2007 when a user filed an e-mail from a sub folder.	This issue is fixed.
0-94393-QA	Soap Accounts	It was not possible to change the name of a newly entered account when it matched the name of an account that already existed in the database; clicking the Account Name hyperlink brought up the company list with an Enter Company Details button.	This issue is fixed.
17-101017-QA	Solo	Opportunities, order items, and orders were deleted from the Solo Client after a removal matching error occurred.	This issue is fixed.
0-98345-QA	Solo	Company and Person information was not syncing to the Solo server and newly added data was deleted from both the client and the server.	This issue is fixed.

Rolled Up Fixes

None.

Patch N

Released	August 31 2009		
Files included	DLL version	6.1.0.26	
	Outlook plugin	6.1.0.11	
	Document plugin	6.1.0.3	
	CTI plugin	6.1.0.5	

Patch N Issues List

Ref ID	Area	Description	Status
0-87495-QA	Solo	It was possible to enable more Solo users than were licensed from the Administration Users area by selecting the Allow Offline Access checkbox for each user.	This issue is fixed.
0-90054-QA	Reports	Oracle issue. A SQL error occurred when trying to run a report based on the vReportCompany view.	This issue is fixed.
0-90575-QA	Security Management	The terr_caption field was not updated when a territory was renamed.	This issue is fixed.
0-85865-QA		A timeout error occurred when adding a simple ASP page to the Company tab in Sage 1000 with the Accounts entity switched on.	This issue is fixed.
0-87167-QA	Companies / People	After adding a new currency field to the Company table and then adding a new company record, the currency field value was reset.	This issue is fixed.
0-89357-QA	Customization	The Sort function for Notes on the Company Notes tab was broken.	This issue is fixed.
0-90902-QA	Workflow	Workflow functionality on Wave Activity Items with an item Type: Other was not available.	This issue is fixed. Workflow Buttons for Wave Activity Item: Other have been restored.
255-90784-QA	Customization	A custom ASP product search was running on the client side, whereas it should have been running on the database side.	The issue is fixed.
0-85982-QA	Groups / Target Lists	E-mails sent to a group were being linked only to the company records and not the person records.	This issue is fixed.
0-91978-QA	Comms/Diary	Completed time in a task was being reset to the current time after an edit to a completed task.	This issue is fixed.

Ref ID	Area	Description	Status
0-81475-QA	Comms/Diary	E-mails were not being filed correctly if they included a contact in the BCC field.	This issue is fixed.
0-87563-QA	Performance / Scalability	A number of ProcessTab errors occurred after a system shutdown that required an IIS restart.	The issue could not be reproduced.
0-85710-QA	Comms/Diary	The error "Custom Object Children not loaded" occurred when saving a communication.	This issue is fixed.
0-63257-QA	Reports	It was not possible to delete saved searches from reports.	This issue is fixed.
0-82892-QA	CTI	The consult option in CRM CTI returned the error "Cannot autodial this number. Check that the number format is correct".	This issue could not be reproduced.
0-65297-QA	Security Management	A user who was not on the company team could create a new opportunity, search for the opportunity, and view and edit it.	This issue is fixed. Security has been added so that if a user has 'Must be on Company Team' set for 'Restrict Updates' then they will not be allowed to insert sensitive data for a company unless they are on the company team. However, because it is impossible to validate against all possible data entry scenarios, a user who is not on the company team will still be able to enter data, but will get a security error when they try to save it.
416-89807-QA	CTI	When a call came through via CTI, the CRM CTI panel message "Retrieving Caller Data" appeared on screen constantly and no link to the contact record was returned.	This issue is fixed.
0-87714-QA	E-mail Manager	E-mail attachments were not being saved for companies that had an accented character in their name.	This issue is fixed.
0-87792-QA	Reports	Report Saved Searches based on a territory lost their search criteria after the territory was moved.	This issue is fixed.

Ref ID	Area	Description	Status
0-93703-QA	Call Handling	Outbound call lists were not being populated after a new wave activity with outbound calls was created.	This issue is fixed.

Rolled Up Fixes

None.

Patch M

Released May 31 2009

Files included

DLL version	6.1.0.23
Outlook plugin,	6.1.0.9
Document plugin	6.1.0.2
CTI plugin	6.1.0.3

Patch M Issues List

Ref ID	Area	Description	Status
0-82624-QA	3rd Party Software	Some problems were experienced with a crystal report with parameters after applying patch 6.1l.	This issue is fixed.
0-84188-QA	Accounts	When a non-admin user made changes on the Account summary page and saved those changes, links to other entities, such as Company and Person, were lost.	This issue is fixed.
0-86564-QA	Comms/Diary	An error occurred after switching the calendar to day view then clicking on a specific date.	This issue is fixed.
0-81475-QA	Comms/Diary	E-mails were not being filed correctly if they included a contact in the BCC field.	This issue is fixed.
0-80625-QA	Companies / People	An error occurred when trying to save a new company.	This issue is fixed.
0-80760-QA	Customization	There were performance issues when opening the Orders tab when there were a large number of orders within an Opportunity.	This issue is fixed.
0-83198-QA	Customization	A custom ASP page stopped working after upgrading to 6.1k.	This issue is fixed.
0-83616-QA	Customization Wizard	A link on the communication table in a case that was attached to a customized entity was lost.	This issue is fixed.
0-83499-QA	Database	An error occurred when working with annually recurrent meetings with an end date in the near future (e.g. 2015).	This issue is fixed.
0-78094-QA	Document Plugin	An SQL error occurred when performing a document merge on a Company name containing simplified Chinese characters.	The issue is fixed.

0-77715-QA	Document Plugin	The contents of a newly added multiline text field did not display after performing a mail merge on a quote.	This issue is fixed.
0-78864-QA	Document Plugin	An error occurred in the document plugin when attempting to merge a Quote.	This issue is fixed.
0-81078-QA	E-mail Client	It was not possible to send an e-mail from the company context using a newly created template with an umlaut in its title.	This issue is fixed.
0-81732-QA	E-mail Client	Some extended characters were displaying as HTML code (e.g. <) when the Send E-mail As HTML preference was set to No.	This issue is fixed.
0-63934-QA	E-mail Manager	When a confirmation e-mail was received, the sent time was 7 hours behind the actual sent time. For example, if the e-mail was sent at 07:13am the timestamp on the sent e-mail was actually 00:13am.	This issue is fixed.
0-77641-QA	Groups / Target Lists	CSV files exported from Groups were missing duplicate rows for cases.	This issue is fixed.
0-79273-QA	Groups / Target Lists	After adding a new field on Company - ((Intelligent Select) Use Existing Lookup: Comp_Sector) - and adding it to the Company Entry Screen, the translation code was returned rather than the translation after the new field was included in a company search.	This issue is fixed.
0-79299-QA	Groups / Target Lists	A non-admin user without access to a newly created private group could exclude the company record of a company in the private group.	This issue is fixed.
0-80607-QA	Groups / Target Lists	A group was created on one server and a number of people were excluded from it. Then, when the group was viewed from an install on a different server, all of the people in the group had the Exclude check box selected, but the page header read "0 Excluded".	This issue is fixed.

0-78230-QA	Groups / Target Lists	An error occurred when a user attempted to edit a group created from Advanced Find.	This issue is fixed.
0-85260-QA	Groups / Target Lists	Credit card fields were not exporting to CSV in the correct format.	This issue is fixed.
0-69699-QA	Integration	Integration Sync Schema was not working with some installations.	This issue could not be reproduced.
0-76702-QA	Integration	The acc_branche field was not created when an ERP integration was created on an Oracle database.	This issue is fixed.
0-72860-QA	Integration	A new value added to a drop-down in the ERP system was not added to the corresponding area in CRM following synchronization.	This issue is fixed.
0-68613-QA	Integration	The header information was not updated on an account where the RTDV data returned was on multiple pages.	This issue is fixed.
0-78181-QA	Integration	The behavior of the integration configuration dialog box changed after installing patch 6.1k.	This issue is fixed.
0-79056-QA	Keyword Search	There was a memory leak in the CRM Indexer Service that caused a file called exceptions.ix to grow to about 2 GB a day in the indexing folder (fulltext.ix).	This issue is fixed.
0-78572-QA	Opportunities	Figures in the Close By column of the My Pipeline panel were not displaying correctly after adding a new Opportunity to a quarterly forecast.	The issue is fixed.
0-78504-QA	Opportunities	The duration in the Opportunity and Lead tracking notes screen was always showing as 1.	This issue is fixed. The Duration takes into account the business calendar linked to the SLA. The business calendar must be set from the Business Calendar tab in Administration System Timings.
0-83788-QA	Order Entry / Products	Non-admin users were able to modify product metadata.	This issue is fixed.

0-79153-QA	Outlook Integration	There was an issue synchronizing contacts from CRM to Outlook - users that had been deleted in the past but who had been newly added were appearing only in Outlook's deleted items area.	This issue is fixed.
0-78566-QA	Outlook Integration	Chinese data was not displayed correctly after a sync from CRM to Outlook.	This issue is fixed.
0-63257-QA	Reports	It was not possible to delete saved searches from reports.	This issue is fixed.
0-85667-QA	Reports	An SQL error occurred when running a report that included a view that was linked to the Users table.	This issue is fixed.
0-65297-QA	Security Management	A user who was not on the company team could create a new opportunity, search for the opportunity, and view and edit it.	This issue is fixed. Security has been added so that if a user has 'Must be on Company Team' set for 'Restrict Updates' then they will not be allowed to insert sensitive data for a company unless they are on the company team. However, because it is impossible to validate against all possible data entry scenarios, a user who is not on the company team will still be able to enter data, but will get a security error when they try to save it.
0-65788-QA	Self Service	When a currency field was added to a block in self service, it was not displaying in the correct format when viewed in the Self Service web site - the decimal point was missing and it was left aligned.	This issue is fixed.
0-80644-QA	Solo	An SQL error was returned when attempting to synchronize with the Solo client.	This issue could not be reproduced.

0-81909-QA	Solo	A user accidentally disconnected from the Internet during Solo synchronization and noticed there was some lost data when they tried to sync again.	This issue is fixed. Note: The disconnection of the sync was not the cause of this issue; there was an SQL error on the server while saving the data. Now the client will never remove non-matching data if there are any errors while sending or saving data.
0-82926-QA	Web Services	A BOF or EOF error occurred when adding Orders or Quotes via the Web service.	This issue is fixed.
0-67832-QA	Workflow	A client created a new primary rule using vListOpportunity view in an attempt to create an opportunity within the context of a person and have the oppo_source field set to whatever was being selected under pers_source after the opportunity was created. However, the attempt was unsuccessful.	This issue is by design. The Result Column Value action is not allowed for Primary Rules.
0-79335-QA	Workflow	A custom opportunity workflow stopped working after patch 6.1i was applied.	This issue is fixed.

Rolled Up Fixes

The following 6.0x case fixes have been rolled up to this patch. Please refer to the 6.0 Patch Release Notes for more information.

Ref ID	Area
0-67490-QA	CTI
0-63342-QA	Call Handling
426-65021-QA	Find / Advanced Find
0-73614-QA	Outlook Integration
255-66784-QA	Performance / Scalability
0-78673-QA	Related Entities
0-76352-QA	Solo

Patch L

Released February 2009

Files included

DLL version	6.1.0.22
Outlook plugin,	6,1,0,9
Document plugin	6.1.0.2
CTI plugin	6.1.0.3

Issues addressed This patch addresses a number of localization and internationalization issues.

Patch L Issues List

Ref ID	Area	Description	Status
11-79681	Outlook Integration	The Preference Tab was not functioning when accessing CRM via VPN and running Outlook integration.	Fixed.
328-41416	Internationalization	The day column in the calendar tab was too narrow to display Chinese characters.	Fixed.
0-52751-QA	Hosting	It was not possible to save a newly created HTML e-mail template with a background image.	By design. Background images are not supported in the 6.1 e-mail editor.
0-63670-QA	Comms/Diary	It was not possible to change the default value for field End Time in tasks.	By design. If you were to change the default start time for an appointment you would also be changing the default due date for the task.
0-66165-QA	Web Services	The Web Service returned an error when trying to update the Quote Items table.	Fixed.

Ref ID	Area	Description	Status
0-66624-QA	Integration	The ERP system was not recognizing that an Account's Primary Address had been deleted.	By design. There is no easy way to know if a deleted address was the primary address when the integration starts, because this information is saved into the Acc_primaryAddressId column and, when the address is deleted, this column is set to 0. To implement a solution, it would be necessary to keep a history of the address to know if it was the primary address when it was deleted.
0-66652-QA	Hosting	An error was returned when attempting to create a new Opportunity on a hosted system but failing to fill in all of the required fields.	Fixed.
0-68393-QA	Integration	A synchronization error occurred when an ERP_ID contained an apostrophe.	Fixed.
0-66034-QA	Outlook Integration	A data (endelement) error occurred when synchronizing with Outlook.	Fixed.
0-74447-QA	Outlook Integration	The error "Fail: E-mail has not been attached" was returned when trying to file an e-mail to CRM.	Fixed.
0-65923-QA	Leads	A user was unable to delete Leads from a hosted system.	Fixed.
328-73757	Internationalization	Some Chinese text strings were not localized properly when synched with Outlook.	Fixed.
328-41081	Internationalization	Chinese characters were not being recognized by Keyword Search.	Fixed.
66-54854-QA	Link And Sync	When an entity was removed from the link and sync schema and the XSD version was updated, the change was not reflected in the entity mappings in CRM, and the entity continued to be linked.	Partially by design. CRM will not delete an entity if the entity is removed from the schema. The entity mappings are deleted only when the integration is deleted. However, code has been added to stop synching entities that are no longer in the schema.

Ref ID	Area	Description	Status
328-57636	Integration	Duplicated accounts were displayed after e-mail information was synced from CRM to ERP.	Fixed.
150-76867	Install / Upgrade	Old backup folders were being added to the soloclient.zip file when a Solo patch was run.	Fixed.
330-76894	Internationalization	Some Chinese text strings were not localized properly when synched with Outlook.	Fixed.
0-67551-QA	Customization	Asian text in button captions for newly created entities was not displaying correctly.	Fixed.
0-73019-QA	Call Handling	A Person created out of an Outbound Call List was not linked to the correct Company.	Fixed.
0-72860-QA	Integration	A new value added to a drop-down in the ERP system is not added to the corresponding area in CRM following synchronization.	Fixed.
435-73293-QA	Reports	The User Logon Activity report showed duration as 0:00 for users who had been using the system, logging cases, etc.	Fixed.
435-73300-QA	Reports	Two separate groups were generated when there was a groupby in the report criteria, e.g. "admin" and "ADMIN" were shown as separate groups.	Fixed.
0-73178-QA	Reports	After exporting a report containing a note with over 500 characters to CSV, there were duplicate lines that cut off some of the notes area.	Fixed.
0-71342-QA	Companies / People	A CLOB error was returned when trying to delete a Company.	Fixed.
328-73758	Internationalization	Data would not synchronize between CRM and CRM Solo on a Chinese install.	Fixed.
0-73920-QA	Comms/Diary	The time zone setting was creating problems in the Calendar.	Fixed.
0-73932-QA	Comms/Diary	The week started on Saturday in the CRM calendar, even though it had been set to start on Sunday.	Fixed.
0-73904-QA	Reports	After running a report and exporting to CSV on a hosted install, the end of the report information was repeated, but cut off over several lines.	Fixed.

Ref ID	Area	Description	Status
309-74144-QA	Hosting	Data could not be exported to CSV from the Company entity on a French hosted install.	Fixed.
0-74245-QA	Leads	Although, the WebToLead to create Leads into the CRM system was working generally, Leads were created in the Assigned stage and also the opened date field was left blank.	Fixed.
0-74497-QA	Document Plugin	German special characters were corrupted in documents created with synched Solo client templates.	Fixed.
0-74398-QA	Performance / Scalability	There were performance issues with the Lead Communications tab.	Fixed.
0-75225-QA	Web Services	The Web Service log file contained a password in clear text.	By design.
0-74830-QA	Security Management	An error occurred when attempting to rebalance territories.	Fixed.
0-75189-QA	Comms/Diary	A summary report listed only two Communications even though there were three recorded on the Communications tab.	Fixed.
0-76146-QA	Find / Advanced Find	Deleted records were appearing on a report exported to CSV.	Fixed.
0-76546-QA	Workflow	It was not possible to create a Send E-mail workflow action when the Send E-mail as HTML was set to No.	Fixed.
0-77658-QA	Customization	An org chart graphic displayed with the SageCrmOrgGraphicBlock object was no longer visible after installing patch i.	Fixed.
0-77594-QA	Keyword Search	Keyword Search for custom entities on top of the Find screen returned a different number of results than when using the Keyword Search Find area.	Fixed.
0-77580-QA	Solo	An error occurred when trying to delete companies from Solo.	Fixed.
0-78535-QA	User Interface	When the Groups drop-down list's dropdownthreshold is set to 5, any selected fields should be shown as a Search Select Advanced when over five records are returned. However, the list is still displaying as a drop down.	Fixed.

Ref ID	Area	Description	Status
0-74485-QA	Campaign Management	An error occurred when sending mass e-mails.	Fixed.
0-74663-QA	Outlook Integration	E-mails with inline images were filed in the Documents tab according to the inline image rather than the e-mail subject.	Fixed.
0-75889-QA	Outlook Integration	Contact information held in CRM was not synching across properly to Outlook.	Fixed.
0-75745-QA	Multi Server	CRM was performing checks to see if users were logged on other servers even when load balancing was set to 'false'.	Fixed.
0-76596-QA	Outlook Integration	An error occurred when trying to file e-mail from Outlook to CRM.	Fixed.
0-76463-QA	Outlook Integration	When using the Outlook plugin with the Solo client, the File Email function was performing case-sensitive searches on e-mail addresses and therefore not assigning e-mails to the correct contacts.	Fixed.
332-76786	Comms/Diary	Mass e-mail was not saved on the Person communications screen or the Company communications screen.	Fixed.
0-76907-QA	Related Entities	An error occurred when selecting graphical mode in the Related Entities area.	Fixed.
0-76128-QA	Solo	An error occurred when parsing client data on Solo.	Fixed.
0-75895-QA	Workflow	A user who created an e-mail reminder to himself received an e-mail from a different e-mail address than his own.	By design. The reason the user received a reminder from a seemingly random e-mail address is because they used a template but did not fill out the From field. When this field is blank, it is filled by default by the usersession username.
0-77108-QA	Mobile	It was not possible to create a new Opportunity on a mobile device.	Fixed
0-76822-QA	Web Services	An error occurred in the Web service after adding fields to the Address entity.	Fixed.

Rolled Up Fixes

The following 6.0w case fixes have been rolled up to this patch. Please refer to the 6.0 Patch Release Notes for more information.

Ref ID	Area
0-61570-QA	Companies / People
0-62988-QA	Web Services
0-74721-QA	Solo
0-75537-QA	Solo
332-75864	Comms/Diary
0-65628-QA	Outlook Integration
0-65049-QA	Keyword Search
255-66784-QA	Performance / Scalability
0-72458-QA	Reports

Patch K

Released: November 28 2008

Files Included: DLL version 6.1.0.21, Outlook plugin 6,1,0,9, Document plugin 6.1.0.2, CTI plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch K Issues List

Solo

Synchronizing did not install the new 6.1 .dll on the Solo client. The issue is now fixed. (Case ID 135-517490)

Create Company

The unexpected event EStringListError: List index out of bounds (-1) occurred when trying to create a company on BMW DB on Oracle 10g. The issue is now fixed. (Case ID 410-69458)

Company details

Company details were being retained even after the company data had been deleted and written over. The issue is now fixed. (Case ID 0-60707-QA)

Discount on Orders

The discount on Orders was not being subtracted properly. The issue is now fixed. (Case ID 0-61522-QA)

#oppo_assigneduserid#

CRM resolved #oppo_assigneduserid# to the user's first and last name instead of their ID when creating a workflow to change the owner of an Opportunity Record. The issue is now fixed. (Case ID 0-61866-QA)

Error not translated

The error message on the logon screen 'You may need to recreate views manually' was not translated into German on a German install. The issue is now fixed. (Case ID 418-62716-QA)

Field Level Scripting

It was not possible to add field level scripting with DefaultValue='%' in the create script box for Product name. The workaround for this is to write the following code:

```
<script>
window.attachEvent("onload",function()
{
    document.getElementById("prod_name").value = '%';
});
</script>. (Case ID 0-63965-QA)
```

SageCRM.com

SageCRM.com users were getting logged out frequently. The issue is not fixed. (Case ID 0-63161-QA)

Follow-up tasks

It was not possible to create a follow-up task or appointment in the context of a Communication. The issue is now fixed. (Case ID 0-64047-QA)

Updating oppo_opportunityid

The user did not have rights to update oppo_opportunityid when using the web service to update an Opportunity. (The issue is now fixed. (Case ID 0-64299-QA)

E-mail template

Defined fields in an e-mail template were not shown when using the template for mass e-mails. The issue is now fixed. (Case ID 0-64490-QA)

Send and File button

The Send and File button disappeared when attempting to send a mail via Outlook with Outlook integration enabled. The issue is now fixed. (Case ID 0-64780-QA)

Max length of the "comp_name" field

It was not possible unable to modify the max length of the "comp_name" field in the Company table to 150 chars using altercolumnwidth(). The issue is now fixed. (Case ID 0-64889-QA)

Default currency value

An error occurred when changing the default value for the Quot_Currency (Administration -> Customization -> Quote) field. The issue is now fixed. (Case ID 0-64881-QA)

SageCRM.com mass e-mail

An unexpected event occurred when sending mass e-mail on a hosted install. The issue is now fixed. (Case ID 0-64877-QA)

Search Select Advanced

When trying to create a Search Select Advanced field based on a linked table which is pointing to a table on an Oracle back end, CRM queried the table using MSSQL syntax instead of Oracle syntax. The issue is now fixed. (Case ID 0-65147-QA)

Duplicate Communications

After doing a company search and selecting New Task, communications were being created for people that did not belong to any of the companies returned in the search. The issue is now fixed. (Case ID 0-65094-QA)

Master CRM

Master CRM was not showing the correct user information. This issue is by design but the current behavior is being investigated. (Case ID 0-65045-QA)

Users-based view report

A SQL error occurred when running a report on a users-based view. The issue is now fixed. (Case ID 0-62631-QA)

Territory on File E-mail

It was not possible to add Territory as a security feature in the Outlook File E-mail function. The issue is now fixed. (Case ID 0-65364-QA)

German translation

In a newly created marketing-campaign with outbound calls on a German install, the "worldwide" area was not translated. The issue is now fixed. (Case ID 0-65575-QA)

Communication on Blackberry 8330

It was not possible to edit a Communication on a BlackBerry 8330 when accessed via My CRM | Calendar. The issue is now fixed. (Case ID 0-65606-QA)

Workflowinstance

A newly created opportunity got to the same stage in the workflowinstance table as the parent opportunity instead of using the first stage of the workflow. This issue is by design. (Case ID 0-65964-QA)

E-mail timestamp

The timestamp of confirmation e-mails sent from CRM was off by 7 hours when they were received in Outlook. The issue is now fixed. (Case ID 0-63934-QA)

Meeting planner

After creating a task that started at 00:00, the previous day was displayed as fully booked in the meeting planner. The issue is now fixed. (Case ID 0-65805-QA)

Currency Field in Where clause

A SQL error occurred when trying to create a group in the Company context when there was a currency field in the where clause. The issue is now fixed. (Case ID 0-66560-QA)

Deleted users

Deleted users were appearing on the inactive users list within Administration | Users | User Activity. The issue is now fixed. (Case ID 0-67782-QA)

E-mail timestamp

The timestamp of e-mails sent from CRM was off by 4 hours when they were received in Outlook. The issue is now fixed. (Case ID 0-68433-QA)

MasterCRM company name search

An error occurred when performing a Company name search on MasterCRM. The issue is now fixed. (Case ID 0-71020-QA)

Deleted territories

Deleted territories were visible in advanced find. The issue is now fixed. (Case ID 332-73309)

Duplicate options added to Territory

A where clause in the SQL statement for running a search for Status = None and Territory = Any Territory, an extra unnecessary duplicate option was added on territory every time a new check box was added to the screen. The issue is now fixed. (Case ID 255-73519-QA)

Performance issue

There was a significant dip in performance while inserting and updating using AisService.asmx by GSB. The issue is now fixed. (Case ID 0-58129-QA)

Fieldvalue % character

It was not possible to insert the % character into a fieldvalue using the new integration framework or AIS. The issue is now fixed. (Case ID 0-59330-QA)

CRM Installer Service

When the CRM Installer Service was doing the nightly cleanup and deleting unused accounts, it was not removing the unused app pools from the default website. Also, when the service was removing/deleting a customer database, the database could not be deleted as SQL Server had control of it. These issues are now fixed. (Case ID 309-66521-QA)

Integration framework

The selection screens for Company, Account and Person were not working correctly. The issue is now fixed. (Case ID 0-61634-QA)

Product family records

Product family records were not updated if a field value contained the characters ä, ü, ö, or ß. The issue is now fixed. (Case ID 0-69325-QA)

Modal messages

Modal messages were not displayed when AutoSynch was on. The issue is now fixed. (Case ID 0-72185-QA)

Static groups

Two static groups were created, one based on Person (Personen mit T) the other based on Company (TestKampAusschluss), but only one worked correctly. The issue is now fixed. (Case ID 0-70585-QA)

Inline customization

It was not possible to display any data in CRM after inline customization was applied. The issue is now fixed. (Case ID 0-72328-QA)

Mass e-mail from a group

It was not possible to send mass e-mail from a group of companies. The issue is now fixed. (Case ID 0-72259-QA)

Outbound Call Lists

A Person record created from an Outbound Call List was not linked to the correct company. The issue is now fixed (Case ID 0-73019-QA)

Territories on Advanced Find

A search performed using Advanced Find could see all territories, including those it should not have had access to. The issue is now fixed. (Case ID 332-73308)

Faxes

Faxes sent to a phone number from CRM are being sent by postmaster@eware.com instead of the verified sender, seadOD@lightforce.net.au. The issue is now fixed.

Solo client

The Solo client failed to install on CRM v6.1j. The issue is now fixed. (Case ID 0-73867-QA)

Exporting to CSV

When exporting a search to CSV, the file was not exported in the proper format. The issue is now fixed. (Case ID 0-74106-QA)

Creating Quotes and Orders

A number of exceptions occurred when creating Quotes or Orders. The issue is now fixed. (Case ID 332-74891)

Line Item

An error occurred when trying to save a line item. The issue is now fixed. (Case ID 332-75162)

Patch K and Oracle 10g

A SQL error occurred creating a new instance of Oracle 10g and installing patch K. The issue is now fixed. (Case ID 415-75177)

Search Select Advanced

A SQL error occurred after creating a Search Select Advanced field based on a customized translation. The issue is now fixed. (Case ID 415-75330)

Patch J

Released: October 31 2008

Files Included: DLL version 6.1.0.20, Outlook plugin 6,1,0,8, Document plugin 6.1.0.2, CTI plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch J Issues List

The following issues are addressed in Patch J:

New User exception

An exception occurred when trying to create a new user. The issue is now fixed. (Case ID 332-71325)

SMS notification

SMS notification was not working. The issue is now fixed. (Case ID 0-20648)

Deleted address

An address deleted from CRM was still visible in the Account summary page. The issue is now fixed. (Case ID 328-57645)

Merge documents

The CRM application froze when trying to merge a Word document with a shared template. The issue is now fixed. (Case ID 410-60708)

Merged Quote

An error occurred after viewing a merged quote attachment under Communications. The issue is now fixed. (Case ID 0-65559-QA)

6.1e on Hosted

Since installing 6.1i in the .com environment, the alphabetical order of the library shared folder on the file server has been messed up. The issue is now fixed. (Case ID 372-65971-QA)

Company Records sorting

Company records displayed on the Dashboard were not sorted correctly in descending order. The issue is now fixed. (Case ID 0-66293-QA)

E-mails from within CRM

E-mails sent from within CRM removed the recipient info from the To field and the text from the Subject field. The issue is now fixed. (Case ID 0-66539-QA)

New Mobile Device

It was not possible to add a mobile device through Administration | Advanced Customization | Devices. The issue is now fixed. (Case ID 0-66660-QA)

Key Attributes text field

The Key Attributes text field became truncated when exporting to CSV format. The issue is now fixed. (Case ID 0-68895-QA)

Send E-mail workflow

When accessing a Send E-mail workflow action, the email template appeared to be blank. The issue is now fixed. (Case ID 0-69277-QA)

Follow-up tasks

It was not possible to create a follow-up task. The issue is now fixed. (Case ID 0-69435-QA)

Outlook synching

It was not possible to sync to Outlook on a hosted install. The issue is now fixed. (Case ID 0-69786-QA)

File E-mail

The File E-mail functionality was not working. The issue is now fixed. (Case ID 0-69911-QA)

Outlook synching

An error occurred when trying to synchronize with Outlook. The issue is now fixed. (Case ID 0-70037-QA)

Synchronize Outlook Deletions

The Synchronize Outlook Deletions functionality was not functioning correctly when set to No. The issue is now fixed. (Case ID 372-70358-QA)

Custom entity blocks

Patch H caused a problem with custom entity blocks. The issue is now fixed. (Case ID 0-70965-QA)

Call lists

An error occurred when attempting to save a call list. The issue is now fixed. (Case ID 415-72642)

Renaming territories

It was not possible to rename newly created territories. The issue is now fixed. (Case ID 332-73056)

Password expiry date

The password expiry date for users could not be reset. The issue is now fixed. (Case ID 0-51200-QA)

Document Library fields

Document Library fields were not populated after a mail merge. The issue is now fixed. (Case ID 0-51606-QA)

Thousand Separator

Prices did not reflect the selected thousand separator when checked. The issue is now fixed. (Case ID 66-53056-QA)

Web Services <required> tag

When the <required> tag was populated in the Web SERVICE when doing a addcustomscreen, the value was ignored. The issue is by design. (Case ID 0-53983-QA)

Quotes tab

An error occurred when trying to delete a Quotes tab. The issue is now fixed. (Case ID 0-59563-QA)

Picklists in Accounts

When adding items to picklists in the Accounts entity, the code appeared in the list rather than the required value. The issue is now fixed. (Case ID 0-58992-QA)

Data Upload

During data upload, duplicates were set to process by batch, but the resultant Excel file did not contain the duplicates. The issue is now fixed. (Case ID 0-61387-QA)

Component Manager

There was an issue with Component Manager when trying to script a new table. The issue is now fixed. (Case ID 0-61768-QA)

Custom captions

Custom captions were not updated when a territory was renamed. The issue is now fixed. (Case ID 0-62112-QA)

Custom communications

The error message 'Functionality Not Available' popped up when trying to save a custom Communication. The issue is now fixed. (Case ID 0-62031-QA)

CTI

CTI was not functioning because there was a quote sign (") in the CTI Device Name. the issue is now fixed. (Case ID 0-62448-QA)

Appointments

A newly created appointment was not viewable in the calendar. The issue is now fixed. (Case ID 0-62709-QA)

Component Manager error handling

Component Manager did not handle an error in a faulty component correctly and installed the component. The issue is now fixed. (Case ID 0-62760-QA)

Integration credentials

The message "Supplied ERP logon credentials are invalid" appeared When creating an integration. The issue is now fixed. (Case ID 418-62727-QA)

Custom entities

Context was not being retained within a newly created Custom Entity. The issue is now fixed. (Case ID 0-63072-QA)

Outbound call list headers

The wrong header information was contained in Outbound Call lists. The issue is now fixed. (Case ID 0-63520-QA)

End time field

It was not possible to change the default value in the End Time field. The issue is now fixed. (Case ID 0-63670-QA)

Web Services – Territories

It was not possible to update a territory through Web services. The issue is now fixed. (Case ID 0-63812-QA)

Web Services – Order Items

It was not possible to delete Order Items via Web Services. The issue is now fixed. (Case ID 0-64119-QA)

Document locking

The document locking functionality was not working properly. The issue is now fixed. (Case ID 0-64169-QA)

Follow-Up Tasks

There was an issue with the "Create Follow-up Task" functionality. The issue is now fixed. (Case ID 0-64613-QA)

List sorting

A list was ordered by the identifier value instead of by the requested user's last name and then first name. The issue is now fixed. (Case ID 0-62726-QA)

Users-based report

A SQL error occurred when running a report on a users-based view. The issue is now fixed. (Case ID 0-62631-QA)

Report search parameters

Report search parameters were not being picked up. The issue is now fixed. (Case ID 0-65340-QA)

Mass e-mails from a Group

An error occurred when sending mass e-mails from a Group. The issue is now fixed. (Case ID 0-64934-QA)

New E-mail in Solutions

After clicking the New E-mail button in a Solution, the solution details are not included in the e-mail body as expected. The issue is now fixed. (Case ID 0-65942-QA)

Tracking records for workflow

No tracking records were generated when a workflow was created for a newly created entity with workflow and workflow progress. The issue is now fixed. (Case ID 0-65863-QA)

PDA Appointments

It was not possible to create an appointment on a PDA. The issue is now fixed. (Case ID 0-65763-QA)

Japanese as default language

An unexpected event error occurred when the default language for a new user was set to Japanese. The issue is now fixed. (Case ID 434-67291)

Password expiry date

The password expiry date for users could not be reset. The issue is now fixed. (Case ID 0-67412-QA)

Different appointments in Outlook and CRM

When an appointment was created in CRM, the time for the corresponding appointment in Outlook was different. The issue is now fixed. (Case ID 0-67278-QA)

PDA Communications

It was not possible to find a newly created communication when working on a PDA. The issue is now fixed. (Case ID 0-68173-QA)

Communications – Shared Documents

A newly created communication was not created under Shared Documents. The issue is now fixed. (Case ID 0-68758-QA)

Document Plugin

An Access Violation error occurred with the Document Plugin on the SalesTeam Solo Client. The issue is now fixed. (Case ID 261-69186)

Exporting CSV reports

Unexpected changes occurred to the format of fields when exporting a report to CSV. The issue is now fixed. (Case ID 0-69013-QA)

File e-mail

There was an issue with the file e-mail functionality. The issue is now fixed. (Case ID 0-66972-QA)

Recurring appointments

Newly created recurring appointments were not being displayed in the Calendar. The issue is now fixed. (Case ID 17-71457-QA)

Metadataloadererror

A metadataloadererror occurred when installing patch H. The issue is now fixed. (Case ID 319-72322)

Document Drop

The error 'Exception: not in transaction' occurred when using Document Drop. The issue is now fixed. (Case ID 0-71702-QA)

E-mail from within a Solution

The default template was used when sending e-mail from a solution instead of the contents of the solution. The issue is now fixed. (Case ID 332-72645)

Solution line breaks

Line breaks in solution text were not appearing in the e-mail body when the e-mail was sent from the solution. The issue is now fixed. (Case ID 332-72646)

Patch I

Released: October 2008

Files Included: DLL version 6.1.0.19, Outlook plugin 6,1,0,6, Document plugin 6.1.0.2, CTI plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch I Issues List

The following issues are addressed in Patch I:

Marketing area

The Marketing area was not available on a system using Oracle. The issue is now fixed. (Case ID 328-64209)

SageCRM.com logon problems

Some SageCRM.com 6.1 accounts were experiencing logon problems after upgrading to 6.1h. The issue is now fixed. (Case ID 309-64997-QA)

New integration failed

Adding a new integration failed after installing patch h. The issue is now fixed. (Case ID 0-69890-QA)

Custom tabs

When a custom tab added for integration was clicked, the background of the tabs changed from blue to white. The issue is now fixed. (Case ID 204-48500-QA)

Field level security

Field level security changes were not included when scripting a component to XML. The issue is by design. (Case ID 66-55990-QA)

Create case via ASP

An error was returned when attempting to create a case via an ASP page. The issue is now fixed. (Case ID 0-64291-QA)

Accounts entity in standard CRM

The Accounts entity was appearing in a standard CRM install. The issue is now fixed. (Case ID 309-65027-QA)

E-mail rules

On a hosted install, e-mail rules were causing errors to occur, and when the rules were switched off, e-mail notifications were sent continuously. The issue is now fixed. (Case ID 0-66115-QA)

Merge Rule: Overwrite current data with duplicate data

There was a problem using the Merge Rule: Overwrite current data with duplicate data functionality. The issue is now fixed. (Case ID 0-63759-QA)

Appointments with Exchange Synchronization

When creating an appointment in SageCRM with Exchange Synchronization, appointments using the & symbol ended up with the word "undefined" when they appeared in CRM. In addition, the symbols % and + disappeared from the created appointments. The issue is now fixed. (Case ID 0-66758-QA)

Filing e-mail

A script error occurred when filing e-mail after having installed patch h. The issue is now fixed. (Case ID 0-68293-QA)

Quote Expired notification

An onscreen Quote Expired notification appeared twice. The issue is now fixed. (Case ID 261-69096)

Mobile e-mail

Mobile e-mail did not work when it was the only Alert Method being used. The issue is now fixed. (Case ID 0-69218-QA)

Account type translation

The Account type was not translated in the Account search result list after its caption was changed into German. The issue is now fixed. (Case ID 0-60356-QA)

Escalation error

A SQL error occurred when an escalation was set up with a Send E-mail action. The issue is now fixed. (Case ID 0-61935-QA)

Solo client

It was not possible to delete a Person from a Company when using the Solo client. The issue is now fixed. (Case ID 0-62278-QA)

Outlook attachments

Attachments sent with e-mail from Outlook were lost, or the recipient received a file called winmail.dat. The issue is now fixed. (Case ID 0-62610-QA)

Groups using custom entities

Groups using custom entities were not available in wave activity. The issue is now fixed. (Case ID 0-62789-QA)

None and All filters

The filters None and All were missing from selection lists. The issue is now fixed. (Case ID 0-61911-QA)

Component Manager

An error occurred in Component Manager after scripting a new component and adding a Dashboard. The issue is now fixed. (Case ID 0-63004-QA)

Dedupe check

The dedupe check for new records was not working. The issue is now fixed. (Case ID 0-63648-QA)

Line item prices with decimal points

After creating a New Line Item for a product with a list price ending with '.00' and exporting the Order to Word 2007, the '.00' disappeared. The issue is now fixed. (Case ID 0-63546-QA)

Live

It was possible to access <http://live.eware.com/eWareLive/eware.dll/sysadmin> from an external location. The issue is now fixed. (Case ID 0-64164-QA)

Additional Lead Workflows

Additional Lead Workflows were not showing up under New when activated. The issue is now fixed. (Case ID 0-64627-QA)

Company summary reports

There was a problem with the views used for Company summary reports. The issue is now fixed. (Case ID 0-56837-QA)

Order by functionality in grids

The Order by functionality in grids was not working in CRM with an Oracle backend. The issue is now fixed. (Case ID 0-67051-QA)

Crystal reports version numbers

Crystal reports version numbers were incorrect in the Crystal Reports Version drop-down list ('11' instead of 'XI'). The issue is now fixed. (Case ID 52-68245)

Patch H

Released: August 2008

Files Included: DLL version 6.1.0.9, Outlook plugin 6,1,0,5, Document plugin 6.1.0.2, CTI plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch H Issues List

The following issues are addressed in Patch H:

SageCRM.com - Logon Problem after 6.1 upgrade

6.1 accounts were experiencing logon problems in SageCRM.com. The issue is now fixed. (Case ID 309-64997-QA)

Mail merge

An unexpected event occurred when opening a communication created as a result of the mail merge of quotation templates. The issue is now fixed. (Cased ID 0-65316-QA)

Send e-mail workflow

The Send e-mail workflow actions were blank. The issue is now fixed. (Case ID 332-67351)

Updates to cases

Updates to cases on <http://www2.eware.com/selfservice/> were not working – any additional attachments were ignored. The issue is now fixed. (Case ID 0-53696-QA)

FLS to XML

FLS settings were not scripted to XML when recording a component. The issue is now fixed. (Case ID 66-55990-QA)

Shared Documents

There was no New Document button on the Shared Documents screen for a recently created marketing campaign. The issue is now fixed. (Case ID 261-60422)

Outlook

There was an issue connecting to CRM via Outlook. The issue is now fixed. (Case ID 0-61183-QA)

SQL error on Quotes

On an Accpac 5.4/CRM 6.1 integration, posting an Accpac quote generated a SQL error in a popup window. The issue is now fixed. (Case ID 210-63094)

SageCRM.com report logo

An error occurred while uploading a logo in a SageCRM.com report. The issue is now fixed. (Case ID 0-63778-QA)

Dashboard saved search

The error "Cannot find appropriate entry group" appeared when using a saved search called My Communications on Dashboard. The issue is now fixed. (Case ID 0-63816-QA)

Integration service timeout

The integration service timed out after 30 seconds if no response was received from the ERP in that time. The issue is now fixed. (Case ID 204-62923-QA)

System menus locked

System menus locked (Administration | Advanced Customization | System Menus) are locked on hosting in version 6.1e. The issue is now fixed. (Case ID 0-63990-QA)

Updating Opportunities via web service

An error occurred when updating Opportunities via web service. The issue is now fixed. (Case ID 0-64064-QA)

Custom_captions files

Custom_captions files threw an error during a hosted upgrade. The issue is now fixed. (Case ID 309-64153-QA)

Workflow buttons

Workflow buttons were not visible on a newly created custom entity. The issue is now fixed. (Case ID 0-65065-QA)

Find screen errors

An error occurred when attempting to use any Find screen. The issue is now fixed. (Case ID 0-65005-QA)

Outlook – Shared Documents

It was not possible to attach a shared document via the Outlook plugin. The issue is now fixed. (Case ID 328-65401)

System Locks

Both the Lock System and Unlock System were appearing on the Administration | System screen. The issue is now fixed. (Case ID 319-65501)

Solo client sync error

An error occurred during synchronization with the Solo client. The issue is now fixed. (Case ID 0-64659-QA)

New users – hosted

It was not possible to add new users to a hosted install. The issue is now fixed. (Case ID 0-66131-QA)

Mobile e-mail notifications

Notifications sent to a mobile e-mail address were not being received. The issue is now fixed. (Case ID 0-66408-QA)

Static Group – Person

An error occurred when trying to create a static group in the Person context, with the Source view set to 'Individual Group'. The issue is now fixed. (Case ID 385-58880)

Group View checkbox

The Group View checkbox did not work for vListPerson when creating a new group. The issue is now fixed. (Case ID 385-59037)

Custom components

The relevant changes were not being carried out when uploading a custom component. The issue is now fixed. (Case ID 0-60291-QA)

Communication list

It was not possible to sort the Communication List by date decreasing. The issue is now fixed. (Case ID 0-60225-QA)

Hide calendar tab

There was an issue when attempting to hide the Calendar tab from Team CRM for some teams but not from MyCRM. The issue is now fixed. (Case ID 0-60126-QA)

Synchronizing Opportunity

An error occurred when trying to synchronize a newly created Opportunity to the server. The issue is now fixed. (Case ID 410-60729)

Line item screen position

An error occurred when adding a comment line and clicking Save "Line item screen position" is set to pop-up. The issue is now fixed. (Case ID 0-60756-QA)

New line item error

An error occurred when adding a new line item to a newly created Order. The issue is now fixed. (Case ID 0-60737-QA)

Reports views unavailable

Certain views marked as being Reports Views were not available when creating reports. The issue is now fixed. (Case ID 426-61254-QA)

Block order – dashboards

Although a "default order by" setting was defined in block definition, blocks on the dashboard were displaying using the default order for the entity. The issue is now fixed. (Case ID 0-61526-QA)

Case workflow

It was not possible to access the next state of case workflow after having used the 'create solution' action in the case Workflow to create a solution. The issue is now fixed. (Case ID 0-61560-QA)

Account/Company entity link

The Account/Company entity link was broken. The issue is now fixed. (Case ID 0-61355-QA)

Default language

The default language option in Administration | System | System Behavior was set to UK English, so newly created users should have UK English set as their default language. However, they were still being created with US English as the default language. The issue is now fixed. (Case ID 0-61614-QA)

Crystal 10 reports

An error occurred when trying to run a report in Crystal 10. The issue is now fixed. (Case ID 0-61436-QA)

Notification reminders

Notification reminders were showing unexpectedly in the Create New Opportunity Items popup window. The issue is now fixed. (Case ID 0-62027-QA)

Communication – wave activity

It was not possible to link a lead communication to wave activity. The issue is now fixed. (Case ID 0-62307-QA)

Custom entity – Groups

It was not possible to create a group based on a view in the context of a custom entity. The issue is now fixed. (Case ID 0-62282-QA)

Invalid URL Character

An error occurred with an invalid URL encoded character when attempting to update a field in Webservices for 6.1. The issue is now fixed. (Case ID 0-62397-QA)

Shared document error – Quotes

The error "The record you requested has been deleted or you may not have security " occurred when trying to access a document added to a quote. The issue is now fixed. (Case ID 0-62514-QA)

E-mail workflow action

An access violation error occurred when on the send e-mail workflow action based on a view. The issue is now fixed. (Case ID 0-62661-QA)

Mass e-mail workflow

When using a workflow that sends out an e-mail to multiple e-mail addresses, the last e-mail address was getting truncated. The issue is now fixed. (Case ID 0-62806-QA)

Rep_deletes table

There were solo synching issues due to the rep_deletes table getting filled up with records from group communications (mass e-mails, etc). The issue is now fixed. (Case ID 0-63241-QA)

Inline images

An e-mail with embedded inline images could not be filed. The issue is now fixed. (Case ID 0-63628-QA)

Digital Signature – Outlook plugin

The Outlook plugin was coming up as not verified under the Add Ons in Internet Explorer. The issue is now fixed. (Case ID 0-63850-QA)

Order/Quote Workflow

A SQL error occurred on the Order/Quote workflow. The issue is now fixed. (Case ID 0-63854-QA)

Attach Shared Document

The Attach Shared Document functionality was not available. The issue is now fixed. (Case ID 0-64055-QA)

SageCRM.com users logged out

SageCRM.com users were being logged out of sessions unexpectedly. The issue is now fixed. (Case ID 0-63161-QA)

File e-mail error

The error "Fail. E-mail has not been attached." occurred when attempting to file an e-mail. The issue is now fixed. (Case ID 0-64295-QA)

Key attributes report

A SQL error occurred when attempting to run a report with key attributes. The issue is now fixed. (Case ID 0-65437-QA)

Outlook synchronization

There were Outlook synchronization issues after a user had upgraded to 6.1. The issues are now fixed. (Case ID 0-64366-QA)

Case-sensitive e-mails

All uppercase text in a new e-mail created within CRM was converted to lowercase when the mail was sent. The issue is now fixed. (Case ID 416-65951-QA)

Views based on any table

A new View can be created based on any table, but views should be limited. This is by design. (Case ID 332-60762)

Leads onscreen notification

The onscreen notification for the Leads entity failed to work. The issue is now fixed. (Case ID 0-60681-QA)

Recurring appointment

An exception occurred when trying to open a recurring appointment. The issue is now fixed. (Case ID 332-67746)

Patch G

Released: July 2008

Files Included: DLL version 6.1.0.8, Outlook plugin 6.1.0.4, Document plugin 6.1.0.2, CTI plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch G Issues List

The following issues are addressed in Patch G:

Hyperlinks on the LineltemGrid

Hyperlinks on the LineltemGrid don't appear to work. This is because Lineltems and LineltemsGrid are no longer available for customization in 6.1 due to Integration. (Case ID 0-39144-QA)

Quotes and Orders totals

The totals for quotes and orders were not being reported on an opportunity's total if the pricing service was running. The issue is now fixed. (Case ID 0-55063-QA)

Syncing Boolean field to SageCRM

An error was returned when attempting to sync a new Boolean field to SageCRM. The issue is now fixed. (Case ID 66-55260-QA)

Multiple validation errors

Validation errors were appearing numerous times – once for each block on the originating ASP page. The issue is now fixed. (Case ID 0-56163-QA)

Default holiday error

An error message occurred when a default holiday set was selected. The issue is now fixed. (Case ID 385-58974)

System menu error

An error occurred when editing the System menus. The issue is now fixed. (Case ID 385-58997)

Trailing comma In multiselect fields

A trailing comma appeared when the values from a multiselect field were displayed. The case is now fixed. (Case ID 0-59370-QA)

Field Level Security

It was possible to match the contents fields that had Field Level Security applied when performing a keyword search. The issue is now fixed. (Case ID 0-59554-QA)

Caption translation

A new caption translation was not displayed when executing a report. The issue is now fixed. (Case ID 0-59687-QA)

Word 2007 files saved as Zips

New documents written in CRM with Word 2007 were saving as Zip files. The issue is now fixed. (Case ID 0-60276-QA)

Entity-level scripts

Entity-level scripts with rollback for the account entity were not supported. The issue is now fixed. (Case ID 405-60255-ENH)

E-mail template attachment

It was not possible to open the attachment on a newly created e-mail template. The issue is now fixed. (Case ID 0-60388-QA)

Date format

On a German install, there were several date format entries with the same label. The issue is now fixed. (Case ID 0-60200-QA)

Lead workflow security

A person without edit rights on leads was able to access the lead workflow. the issue is now fixed. (Case ID 0-60880-QA)

Company names with 3 or 4 characters

When attempting to change a long company name, e.g. „Sage Schweiz AG“, to a name with only 3 or 4 characters, e.g. „ABB“ or „Sage“, the name reverts to the first, longer name. The issue is now fixed. (Case ID 0-60965-QA)

Non-HTML e-mails

It wasn't possible to create non-HTML e-mails. The issue is now fixed. (Case ID 0-60965-QA)

Adding fields to reports

An access violation error occurred whenever a field was added to a report. The issue is now fixed. (Case ID 0-60807-QA)

Shared documents

Shared documents were not visible to the user that had created them. The issue is now fixed. (Case ID 187-61099)

Onscreen coaching

The onscreen coaching settings were not updating correctly. The issue is now fixed (Case ID 0-61107-QA)

Advanced find

Advanced find was not working properly for multi-select fields. The issue is now fixed. (Case ID 0-61187-QA)

Merge functionality

The merge functionality was not consistent for Company and Person when working with custom records. the issue is now fixed. (Case ID 0-61196-QA)

Company record edits not saved

When editing a Company record and changing the Company name to a one that already exists, or to one that was similar to an existing company name, the change was not saved and there was no dedupe warning message. The issue is now fixed. (Case ID 0-61307-QA)

Person phone numbers

The Person phone numbers failed to populate when creating a new company. The issue is now fixed. (Case ID 0-61546-QA)

Addr_AddressId field

The field Addr_AddressId was not found error on the Company | People page. This issue is by design. (Case ID 420-61668)

New lead

A SQL error occurred when saving a new lead. The issue is now fixed. (Case ID 420-61673)

Date/time validation error

A date/time validation error occurred on valid date and time fields in Leads. The issue is now fixed. (Case ID 420-61674)

Person field search

Person field displayed all records and not just those in the context of the Company when the Search With Current Entity option was selected. The issue is now fixed. (Case ID 0-61842-QA)

Send E-mail action

It was not possible to add the Send E-mail action to the 'false' branch of the Workflow. The issue is now fixed. (Case ID 0-61899-QA)

Multiple Send E-mail Actions

When a workflow rule had more than one Send E-mail workflow action, all actions accessed the same e-mail template regardless. The issue is now fixed. (Case ID 0-61999-QA)

Win32 Error

A Win32 Error occurred when running a print preview report. The issue is now fixed. (Case ID 0-62052-QA)

Duplicate company

When attempting to edit a Company record and change the Company name to one that already exists, or to one that was similar to an existing company name, the change was not saved and there was no dedupe warning message. The issue is now fixed. (Case ID 0-61307-QA)

Access violations - Live

Access violations occurred on cases in Live. The issue is now fixed. (Case ID 319-63024)

Quotes and Orders templates

The Quotes and Orders templates did not work after upgrading to 6.1 on a hosted install. The issue is now fixed. (Case ID 0-63099-QA)

Workflow and Escalation e-mails

Workflow and Escalation based e-mails were not being sent. The issue is now fixed. (Case ID 0-63309-QA)

Corrupted German characters

The German characters Ä, ä, Ö, ö, Ü, ü, ß, and § were corrupted when sending a GetPricingDetails request to the ERP web service. The issue is now fixed. (Case ID 0-63582-QA)

Business Calendar page

The number 10.5 could not be saved in the new Business Calendar page. The issue is now fixed. (Case ID 328-63952)

Outlook plugin hangs

The Outlook plugin hung while attempting to connect to the server. The issue is now fixed. (Case ID 0-64008-QA)

E-mail Notifications

E-mail Notifications were not being sent. The issue is now fixed. (Case ID 0-64275-QA)

Export to Word

The export to Word function was not working properly in a hosted environment after the upgrade to 6.1. The issue is now fixed. (Case ID 0-64556-QA)

E-mail reminders

E-mail reminders were not working for tasks and appointments. The issue is now fixed. (Case ID 0-64693-QA)

getConfigurationResponse

When there was an umlaut in an element's "Caption" attribute, getConfigurationResponse did not work. The issue is now fixed. (Case ID 0-55574-QA)

Opportunity validation errors

Validation errors occurred when attempting to create an Opportunity, even though all fields that have been marked as mandatory have been filled in. The issue is now fixed (Case ID 355-62795)

Outlook disconnect message

The Outlook disconnect message was not localized. The issue is now fixed. (Case ID 328-63951)

About box

The About box was not translatable. The issue is now fixed. (Case ID 328-64060)

Company addresses

It was not possible to edit Company addresses in an Accpac 55 integrated install. The issue is now fixed. (Case ID 210-65616)

E-mails with local file references

When sending out an e-mail with a directory path in the e-mail body, the message "The E-mail may contain references to local files" was received. A hidden system parameter has been added so this warning message can be turned off. To install the parameter:

1. Install the patch

2. Log on to CRM

3. Run the SQL script: update custom_sysparams set parm_value = 'N' where parm_name = 'WarnAboutLocalFiles'

4. Refresh system parameters in Administration | System | Metadata

Local Files

When sending an email there will be no more warning messages about local files. The issue is fixed. (Case ID 0-60216-QA)

Hosted performance issues

There were some performance issues on a hosted account. The issues are now fixed. (Case ID 0-58736-QA)

SQL improvements

Some improvements were made to the SQL that populates the snapshot tables and syncs with the solo client on Oracle. (Case ID 0-61834-ENH)

Reports missing

Reports were missing for cases and communications when System | System Behavior | Use Companies was set to No. This issue is by design. (Case ID 0-60599-QA)

Duplicate company

No saved changes were applied when updating a company that was a duplicate as identified by the match rules. The issue is now fixed. (Case ID 0-62476-QA)

CTI plugins

CTI plugins were not included in all patches. The issue has been fixed. (Case ID 0-64794-QA)

Patch F

Released: July 2008

Files Included: DLL version 6.1.0.7, Outlook plugin 6.1.0.3, and Document plugin 6.1.0.2

Issues Addressed: Various issues, none major.

Patch F Issues List

The following issues are addressed in Patch F:

Cannot create new Quotes and Orders (Hosting)

The Financial Details Quote Box and Financial Details Order Box were missing from customer hosting profiles, causing an error when creating or viewing quotes or orders. The issue is now fixed. (Case ID 420-61159)

Reminder Message E-mails not sending

Task reminder e-mails were not being sent. The issue is now fixed. (Case ID 0-63309-QA)

Word 2007 save as Zip file

A document written in Word 2007 was being saved as a zip file. This issue is now fixed. (Case ID 0-60276)

Communications not showing "Letter Out" records

Letter Out type communications were not showing in communication reports. This issue is now fixed (Case ID 0-60212-QA)

E-mail Aliases not working in Workflow

When an e-mail was sent from workflow using a new e-mail alias, the e-mail was not being sent. This issue is now fixed (Case ID 0-60664-QA)

Person field on Communication

The Person field on the communication was showing all person records, not just for the current context. This issue is fixed (Case ID 0-61842-QA)

Quote and Order Address format

The address format for quotes and orders cannot currently be changed to the German format (post code, then city). An enhancement request must be logged. This issue is now closed. (Case ID 0-59334-QA)

SQL error Copying Groups with Advanced Search

On German Windows 2003 using CRM in German, an sql error was generated when carrying out a Save As on a Group with an Advanced Search in the query. This issue is fixed. (Case ID 0-53945-QA)

Error in Recurring Appointments

An error was generated when changing the status of different appointments within a recurrence pattern. This issue is now fixed. (Case ID 0-59449-QA)

Download Database Error (Hosting)

Error on page when selecting Administration | Data Management | Download Database. This issue is now fixed. (Case ID 385-58340)

User Drop-Down in Mass Update Error (Hosting)

An error was being generated when selecting a user field (e.g. Opened By) in mass update. This issue is fixed. (Case ID 385-58863)

SQL Error in Escalation Rule

An “unexpected event” sql error was being generated on escalation rules. This issue is fixed. (Case ID 416-62191-QA)

Unable to Dismiss or Snooze Quick Notifications

Onscreen notifications were displaying to user, but the user was unable to dismiss or snooze them. This issue is fixed. (Case ID 255-61051-QA)

Sender Address incorrect in Escalation E-mail

From address in Escalation Send E-mail action was not working correctly. This issue is fixed. (Case ID 0-57453-QA)

Cannot query company name with semi colon in Web Services

Query was being ignored by Web Services if company name contained semi-colon. This issue is fixed. (Case ID 0-57982-QA)

Cannot set Territory to None during Data Upload (Hosted)

The None option was missing from the Territory field on Data Upload, preventing you from continuing to the next step. This issue is fixed. (Case ID 0-59362)

Connecting COM through VB Script

Page returned no data. This issue is fixed (Case ID 0-61776-QA)

Logged On Users Report not working correctly (Hosted)

The Logged On Users Report was not accurately displaying the number of logged on users. This issue is fixed. (Case ID 0-41254-QA)

Access Violation Error in Workflow Action

Send E-mail action was generating access violation error when based on a view. This issue is fixed. (Case ID 0-60304-QA)

Inline image in E-mail Template

Inline images on E-mail Template screen were not displaying correctly. This issue is fixed. (Case ID 0-59545-QA)

Task Due Date

Warning error generated when communication Start Date/Time earlier than Due Date/Time. This issue is fixed (Case ID 0-59600-QA)

Error with Chinese Characters

SQL error with Chinese characters in Export To File. This issue is now closed. (Case ID 0-59386-QA)

End Date Earlier than Start Date

It was possible to set an end date earlier than a start date in Marketing Campaigns. This issue is fixed. (Case ID 328-61142)

Default E-mail Escalations SQL Errors

An Unexpected Event error was generated after editing the default e-mail notification. This issue is fixed. (Case ID 420-61188)

Run SQL in Customisations XML

An error was generated when adding runsql to the customisations.xml. This issue is fixed. (Case ID 405-59902-QA)

Inserting Check Box Value via Web Services

Check box field was accepting 'true', but not 'Y'. This issue is fixed. (Case ID 261-62098)

Corrupted Character in Integration Creation Screen

When working in Sage CRM in French or German, and attempted to connect to a non-existent web service via the Integration screen, an error was generated containing corrupted characters. This issue is fixed. (Case ID 328-58616)

E-mail Upload Local File

Backspace was not working correctly and error message was not clear. This issue is fixed. (Case ID 332-60227)

Field Delete Currency Field

An unexpected error was occurring because a currency type field was not being fully deleted. This issue is fixed. (Case ID 420-60486)

E-mail not sent to activate account (Hosted)

After signing up for a hosted account, the activation e-mail was not being sent. This issue is closed. (Case ID 415-60589)

Download Database unavailable (Hosted)

The Download Database option was not available. This issue is now fixed. (Case ID 420-61108)

Translation for Recurring Appointments

There were missing caption properties in recurring appointments. This issue is fixed. (Case ID 328-51982)

Caption missing for vescalationquotes

When selecting the source view in a report, there was no caption translation for vescalationquotes. This issue is fixed. (Case ID 328-57627)

Outlook Plugin Options Screen

German strings truncated on Outlook Plugin Options screen. This issue is fixed. (Case ID 328-58242)

Pagination Performance

SQL Server performance was slow when scrolling through search list results. This issue is fixed. (Case ID 332-57888)

Quote Link not deleted

Links to quotes were being displayed after deletion of the quote. This issue is fixed (Case ID 187-61090)

Data Upload on multiple addresses and phone numbers

When uploading companies with multiple addresses and phone numbers, only the first record was uploaded. This issue is closed. (Case ID 0-57675)

Patch E

Released: June 2008

Files Included: DLL version 6.1.0.6, Outlook plugin 6.1.0.3, and Document plugin 6.1.0.2, and CTI Plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch E Issues List

The following issues are addressed in Patch E:

Translations

The integration ID has been added to the custom_caption table so all translations are created again for every new integration. The issue is now fixed. (Case ID 0-58350)

Name hyperlink disappears

When the sequence of the columns on the Product Family Grid was changed so that the product name was not the first column, the hyperlink on the value in the Name column disappeared after a metadata refresh. The issue is now fixed. (Case ID 0-52174-QA)

Views

A newly created View did not appear in the source View list for Groups, even though it was set up to be available. The issue is now fixed. (Case ID 0-55579-QA)

Workflow rules

An error occurred when adding a 'Send Email' rule to a Solutions workflow. The issue is now fixed. (Case ID 0-57565-QA)

Read-only screens in an Outbound Call list

The Person Summary screen is no longer editable after clicking the Last Name hyperlink on the Person Summary panel in an Outbound Call list. The issue is by design. (Case ID 0-57328-QA)

addcustomcaptions

An <addcustomcaptions> element was producing strange results on CRM Selections. The issue is now fixed. (Case ID 66-58051)

Workflow error

An unexpected error occurred when the Cancel button was clicked on the Workflow page. The issue is now fixed. (Case ID 385-59042)

System Administrator Quick Setup Guide

The content in the bottom left corner of the System Administrator Quick Setup Guide window was truncated, and the window could not be adjusted. The issue is now fixed. (Case ID 328-49023)

ShowValidationErrors

The ShowValidationErrors property which suppresses the display of errors within a block was not working. The issue is now fixed. (Case ID 0-56163-QA)

Caption formatting

Formatting captions disrupted the radio button array on the search screen. The issue is now fixed. (Case ID 0-57094-QA)

Context issue - Mail Merge

When attempting to merge a newly created local template for the Person entity with a Person who was not the default Person for the Company, the template was merged to the default Person of the Company. The issue is now fixed. If a user wants to merge a document containing company data, they must be in the Company context, not the Person. (Case ID 0-57337-QA)

Uploading data to an existing company

When uploading an existing company's with additional information, such as address, the updated information was not displayed. This issue is by design – to work around, the merge rule must be set to "Overwrite data with duplicate data". If it is necessary to modify the company address, the address field must be assigned to the Company group. (Case ID 0-57667-QA)

Date and time

The date and time were set incorrectly when a new task was created for an opportunity. The issue is now fixed. (Case ID 385-58189)

Uneditable fields

An error occurred regarding hidden uneditable fields in Administration | E-mail and Documents | Documents & Reports Configuration on the hosted solution. The issue is now fixed. (Case ID 420-58424)

Changing the screen name for Filter Box

An unexpected event occurred after changing the screen name for Filter Box when customizing SLA. The issue is by design - you cannot change the name of a system screen. (Case ID 385-58651)

Missing No Dedupe Rule Column

The No Dedupe Rule Column was missing from the hosted solution. This issue is by design – deduplication must be configured on hosting, whereas it is turned on by default on the on premise solution. (Case ID 385-58652)

Duplicates radio buttons

Radio buttons about duplicates process were missing on Hosting. This issue is by design – deduplication must be configured on hosting, whereas it is turned on by default on the on premise solution. (Case ID 385-58658)

Merge Rule dropdown list

The Merge Rule dropdown list was missing from the Data Upload Lead page. This issue is by design – deduplication must be configured on hosting, whereas it is turned on by default on the on premise solution. (Case ID 385-58667)

Action item was missing

The Action item was missing when trying to edit the Company tab page. The issue is by design - the only actions available on hosting are system actions. (Case ID 385-58676)

End Time cannot be less than Start Time error

The error "End Time cannot be less than Start Time" occurred when attempting to create a recurring appointment with the End Time set to either 8pm or 9pm, regardless of what the start time was set to. The issue is now fixed. (Case ID 0-58854-QA)

Disabled checkboxes

All checkboxes were disabled when the Phone Number or E-mail Address checkboxes were selected after performing a mass update. The issue is by design. (Case ID 385-58963)

Export to File

An unexpected error occurred when the Export to File button was clicked. The issue is now fixed. (Case ID 385-59089)

eWare.Button

Calling a translation with an accented character in the eWare.Button function caused the wrong character to display. The issue is now fixed. (Case ID 0-58822-QA)

Task times behind when synced to Outlook

When tasks were synced from hosted CRM to Outlook with the time zone specified as GMT in both My CRM Preferences and Outlook, the tasks were 5 hours behind. The issue is now fixed. (Case ID 420-59790)

Advanced Customization - hosting

The Advanced Customization system menus were available in hosting, but they should be switched off. The issue is now fixed. (Case ID 420-59915)

Login issues after upgrade

The user could not log in to CRM after upgrading the DB. The issue is now fixed. (Case ID 0-59296-QA)

EIS Actions available

EIS Actions were available to add to Tabs in Customization, although they shouldn't be. The issue is now fixed. (Case ID 420-60471)

Products containing umlauts

Synchronization of updated products that contain umlauts failed. The issue is now fixed. (Case ID 0-59996-QA)

Due date on Tasks

In version 6.1 the due date on Tasks is automatically populated a half hour ahead. This is by design. (Case ID 0-61177-QA)

Patch D

Released: May 2008

Files Included: DLL version 6.1.0.5, Outlook plugin 6.1.0.2, and Document plugin 6.1.0.2, and CTI Plugin 6.1.0.3

Issues Addressed: Various issues, none major.

Patch D Issues List

The following issues are addressed in Patch D:

Creating a New Integration

SQL Timeout when creating a new integration. The issue is now fixed. (0-58483)

Ordering of Comment Line Item

Comment line item was not ordering correctly. The issue is now fixed. (0-54409-QA)

Search Screen Clear button

The Clear action button was not clearing a search on a date field. The issue is now fixed. (0-56682-QA)

Logon to 64 Bit Operating System

An error was generated when logging on to CRM running on Windows Server 2003 64 bit. This issue is fixed by running IIS in 32 bit mode. (0-54545-QA)

Mass Mail Merge on Leads

Access violation error when performing a mass mail merge on leads. The issue is now fixed. (0-56302-QA)

Component Manager Scripting

A Jscript error was generated during recording of a component. The issue is now fixed. (0-54182-QA)

Custom Advanced Search Select

The data type of the value rather than the field was being used to check a custom advanced search select query. This issue is now fixed. (0-55086-QA)

HTTP 404 Error with Attachments

An Error was displayed when trying to view an attachment on an unsent e-mail. This issue is now fixed (0-54863)

Recurring Appointments JavaScript Error

An error was displayed when moving a Cancelled recurring appointment back to a status of Pending. This issue is now fixed. (0-55662-QA)

Sales Forecast not displaying for Manager

Forecasts which have already been created need to be submitted before the results will show for the manager. This issue is now closed. (0-56280-QA)

Adding Forecast Field and exporting to CSV File

The last column of the export was being omitted after adding a currency type field. This issue is now fixed. (0-57952-QA)

Mail Merge Context

Templates which specify the Person entity are available to merge in the Person context, template which specify the Company entity are available to merge in the Company context. This issue is closed. (0-57337-QA)

Change Advanced Search Select Field on Pop-up

If company changed, person – even if only one record exists – is not automatically selected. This issue is now fixed. (0-53829-QA)

CheckPrice in WSDL

Namespace was set to "" and the properties were defined with minOccurs="1". This issue is now fixed. (204-57566-QA)

Send E-mail Action in Escalation Rule

Code in E-mail To address was being replaced with @ symbol. This issue is now fixed. (0-58076-QA)

Multiline Text Fields on RunBlock

These were displaying with less space in 6.1 than in 6.0. This issue is now fixed. (0-55733-QA)

Comm_todatetime showing 1899

When the Communication Comm_todatetime delta was changed from 30 to 15 minutes, the field displayed 1899 on the communication. This issue is now fixed. (0-56378-QA)

Wave Activity not showing in Opportunity

When a wave activity's status is changed to completed, the linked wave activity was not showing on the opportunity. This issue is now fixed. (0-56399-QA)

Company Name with quote mark not working in Lead

JavaScript error when creating a lead for a company with a single quote in its name. This issue is now fixed. (0-56527-QA)

Error on Escalation Rule

An access violation error was generated when adding an escalation rule based on vCommunication on an E-mail Out action. This issue is now fixed. (0-58229-QA)

Typo in Oracle Install Shield

Required was spelt incorrectly in the install shield. This issue is now fixed (399-54469)

Advanced Search Select Pop Up Screen

A blank screen was displayed after clicking on the hyperlink of a company selected via Advanced Search Select. This issue is now fixed. (355-59792)

Solo on French System

Error on Solo install on French system. This issue is now fixed. (328-57997)

Logon Error Message in Hosting

There was no error message displayed when the user logged on to hosted with an incorrect logon or password. This issue is fixed. (309-58066-QA)

Escalation Send E-mail Rule

E-mail was not being sent after new escalation rule created. This issue is fixed. (332-59620)

Title of Pop up Screens

Some pop-up screens had a generic title of "CRM". This issue is fixed (355-57624)

Uninstall Solo from German or French System

Uninstalling Solo from a German or French system was displaying corrupted characters. This issue is now fixed. (328-58241)

Create Group from Advanced Find Date Field

An error was displayed when trying to create a group from an Advanced Find Date field search result. This issue is closed. (261-46468)

Able to Switch Currency when Creating Order

It was possible to switch currency when creating an order to a different currency from the quote. This issue is now fixed. (261-57353)

SQL Error when running Account Report

An SQL error was generated when running an Account report. This issue is fixed. (332-51940)

Crystal Report Params

Search parameters pass in from CrystalReport.RPT search files were not being parsed by Crystal Reports XI. This issue is fixed. (135-57338)

E-mail Upload Local File Field Not Editable

The Local File Field is not editable. This issue is now closed. (355-59809)

E-mail Escalation Action confusing From and To

When the Notify e-mail name and address is not set (in Workflow and Escalation Configuration), the return e-mail address is used. If this is blank, the e-mail address of the logged on user is used. This is by design. This issue is now closed. (332-59810)

Unexpected Error in Wave Activity Follow-up Task

An unexpected error was displayed when creating a follow-up task in the context of a Wave Activity. This issue is now fixed. (420-58314)

Integration: Toggle Overwrite Price

List price value and quoted price value from Pricing Service were not displaying correctly. This issue is now fixed. (261-56186)

Crystal Reports with Password

An error was generated when the user, who runs a Crystal report, has a password. This issue is now fixed. (11-59084)

Error when cancelling out of Workflow

An Unexpected Event error was created when cancelling out of workflow customization. This issue is now fixed. (420-59283)

Task Start Date Behavior

The default time was not being correctly populated for tasks. This issue is now fixed. (420-59292)

Accpac Security details in User Template

The Accpac security details were not being correctly populated in the user template. This issue is now fixed. (210-56404)

CRM Installer Service Error

A log file called 20080312ewaresystem.log was being created alongside the CRM Installer Service log every day. The issue is now fixed. (Case ID 309-57432-QA)

Hosting upgrade tool

There were a couple of problems with the hosting upgrade tool – there was a memory leak and a number of database connections were left open. The issues are now fixed. (Case ID 309-57462-QA)

Hosting v6.1 Registry Key

The following error was returned when upgrading a hosting v6.0 account to v6.1 "License key expired. Please consult your System Administrator." The issue is now fixed. (Case ID 309-57479-QA)

Error in escalation

An error was returned when creating an escalation. The issue is now fixed. (Case ID 416-57854-QA)

Problem with v6.1 upgrade scripts

Several errors occurred when upgrading SageCRM.com v6.0 customers to v6.1, mostly to do with the tables.es script. The issues are now fixed. (Case ID 309-57962-QA)

6.1 Hosting - Button Group Access

The Button Group tab is visible on 6.1 Hosting even though the functionality is disabled. The issue is now fixed. (Case ID 418-582170)

Creating or editing escalations

An unexpected event error was returned when creating or editing an escalation. The issue is now fixed. (Case ID 416-58521-QA)

v6.1 CTI IE Error

Clicking the Hangup button when using v6.1 CTI caused Internet Explorer to crash. The issue is now fixed. (Case ID 255-53140-QA)

Team details lost in new case

Team details were being lost when the status of a newly created case was switched first to Waiting and then to Investigating. The issue is now fixed. (Case ID 372-56200-QA)

Report views

Report views weren't being refreshed after a field had been deleted. The issue is now fixed. (Case ID 385-58108)

Trial version information

The version was showing as a Trial in the dialog box that pops up when the About CRM icon in My CRM | Preferences is clicked. The issue is now fixed. (Case ID 385-58188)

Outlook integration

The default connection information was not displaying in the CRM Server Connection dialog box when installing Outlook integration. The issue is now fixed. (Case ID 385-58398)

No write access

User had no write access to "status" and "stage" fields although write access was set in FLS. The issue is now fixed. (Case ID 385-58230)

Opportunity count

The opportunity count in the Historical Opportunity Summary report was wrong. The issue is now fixed. (Case ID 385-58235)

Field delete

The expected error message failed to appear when trying to delete a field used in a group. The issue is now fixed. (Case ID 385-58272)

Username "Happy"

The username "Happy" was available in the user list box despite the username being disabled. This is by design. (Case ID 385-58236)

New company error

An unexpected error page popped up when trying to create a new company. The issue is now fixed. (Case ID 385-58267)

Communication find page

The Communication find page appeared incorrectly when deleting a communication with complete/cancelled status. The issue is now fixed. (Case ID 385-58342)

Solo installation error

Unexpected error messages popped up when installing Solo. The issue is now fixed. (Case ID 385-58599)

Default dashboard changed

The default dashboard changed when creating another dashboard with the condition "Set As Default" unchecked. The issue is fixed. (Case ID 385-58907)

E-mail error message

The following error popped up when trying to send an e-mail - "There was an error sending your E-mail, the E-mail was not sent. Please consult your system administrator. The specific error was: The system cannot find the path specified." The issue is now fixed. (Case ID 385-58650)

Download database error

An unexpected error page popped up when the Download Database button was clicked in Administration | Data Management. The issue is now fixed. (Case ID 385-58996)

ASP page for Crystal Reports

The ASP page for Crystal Reports was not included in the build. The issue is now fixed. (Case ID 261-60108)

ACCPAC security details

ACCPAC security details were included in a newly created New User template. However none of those details were imported when creating a new user with that template. The issue is now fixed. (Case ID 210-56404)

Escalation workflow actions

Newly created escalation workflow actions were not being saved. The issue is now fixed. (Case ID 332-59607)

SQL error - moving user to team

A SQL error was returned when moving user to a team. The issue is now fixed. (Case ID 355-59070)

New User Resource field

The New User Resource field was on the incorrect screen on v6.1 Hosting. The issue is now fixed. (Case ID 355-59114)

Patch C

Released: April 2008

Files Included: DLL version 6.1.0.4, Outlook plugin 6.1.0.2, and Document plugin 6.1.0.1, and CTI Plugin 6.1.0.1

Issues Addressed: Various issues, none major.

Patch C Issues List

The following issues are addressed in Patch C:

Groups - Search Queries

There was an issue occurring when deleting records from static groups. Despite the records being deleted, they were not being excluded from search queries. The issue is now fixed. (0-56471-QA and 0-55975-QA)

User Select Fields - SQL

Problems were occurring when SQL was added to a User Select field on the Company table. The issue is now fixed. (0-55893-QA)

Solo – Decimal Separators

In French Solo systems, numbers with commas (,) as the decimal separator were not syncing correctly to the solo client. The issue is now fixed. (0-55167-QA)

Oracle Performance

Performance improvements for searching on Oracle databases were implemented. (11-55099)

SageCRM for Sage Accpac - Install

A problem was occurring during the SageCRM for Sage Accpac install on Oracle – when the Accpac55.es script was running. The issue is now fixed. (210-58183)

SageCRM for Sage Accpac – SQL Error

Errors were occurring when SQL restrictions were put on tabs. The issue is now fixed. (210-57988)

Workflow – Conditional Rules

There was an issue with conditional workflow rules. The issue is now fixed. (135-57919)

Navigating Lists - Oracle

There was an issue navigating lists using the navigation buttons. The issue is now fixed. (332-57918)

Online Help – German

Some Help buttons were opening English online help instead of German. The issue is now fixed. (328-57705)

Adding Users - Hosted

There was a problem with adding users to SageCRM.com. The issue is now fixed. (332-57643)

Online Help – Integration Screens

There was a problem with context sensitive links on integration screens. The issue is now fixed. (328-57641)

Indexer Service

The indexer service was not starting automatically having applied SP1. The issue is now fixed. (261-39906)