



**Sage CRM**

**Version 6.2 Patch Release Notes**

## Overview

This document provides details of all Sage CRM patch releases for version 6.2. Installing the most recent 6.2 patch (H) ensures that you get all of the fixes included in earlier patches (if applicable).

## Prerequisites

You need to have Sage CRM 6.2 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 6.2, for example.

## Latest Version

**Latest Release:** Version 6.2

**DII:** 6.2.0.13

## 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 H

**Released** October 4<sup>th</sup> 2010

**Files included**

DLL version	6.2.0.13
Outlook plugin	6.2.0.16
Document plugin	6.2.0.8
CTI plugin	6.2.0.5

### Patch H Issues List

Ref ID	Area	Description	Status
0-114419-QA	Comms/Diary	The Person details were not displaying in a tool tip, when hovering over an appointment in the calendar.	This issue is fixed.
0-114881-QA	Comms/Diary	An SQL error occurred when trying to open a communication when the Must Be On Company Team option was selected in the Restrict Sensitive Info field.	This issue is fixed.
0-105799-QA	Customization	Custom pages were not accessible from the page history.	This issue is fixed.
0-112044-QA	Document Plugin	After merging a quote containing accented characters, the accents were lost in the merged document.	This issue is fixed. The mail merge .DAT file is saved as Unicode or UTF-8, depending on how the user has their delimiter preference set (if it's tab, then the document will be saved as Unicode, otherwise it will be saved as UTF-8).
255-115575-QA	Internationalization	Some French translations were being overwritten.	This issue is fixed.
0-114280-QA	Outlook Integration	The organizers or appointments created in Outlook were being deleted from both Sage CRM and Outlook when the meeting attendees performed a sync.	This is by design. Sage CRM users that do not have a valid e-mail address are treated as external attendees and will be removed from appointments.
372-118826-QA	Outlook Integration	Appointments were deleted for attendees scheduling the meeting on a shared calendar.	This issue is fixed.

Ref ID	Area	Description	Status
255-108980-QA	Performance / Scalability	DB connections were left open and the system eventually crashed after writing a .NET component that used several thousand QuerySelects and adding it to a page, running the component a number of times, then repeating the process.	This issue is fixed. A new SysParam (DotNetConnectionPool) was added to allow .Net Connections to choose whether to use the connection pool. The default is 'N'. If set to 'Y', CRM will work as before. Sage CRM uses OLEDB to open database connections, and OLEDB has its own database pool implementation. What was happening in this case wasn't a memory leak, it was just the OLEDB trying to keep a connection pool large enough for the number of requests. The solution for this case is to make the .Net QuerySelect connection not use the OLEDB pool, this will release the connection when the Object is destroyed. After the changes, the number of connections will increase and decrease in accordance with thread execution.
0-105499-QA	Quotes / Orders	Line items not showing German special characters in quote or order mail merge.	This issue is fixed. The mail merge .DAT file is saved as Unicode or UTF-8, depending on how the user has their delimiter preference set (if it's tab, then the document will be saved as Unicode, otherwise it will be saved as UTF-8).
0-114740-QA	Security Management	It was not possible to add a new document when in the context of an opportunity.	This issue is fixed.

### Rolled Up Fixes

The following 6.1r fixes have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
0-101799-QA	Customization
0-113694-QA	Performance / Scalability
0-111026-QA	Performance / Scalability

## Patch G

**Released** May 2010

**Files included**

DLL version	6.2.0.12
Outlook plugin	6.2.0.15
Document plugin	6.2.0.7
CTI plugin	6.2.0.5

### Patch G Issues List

Ref ID	Area	Description	Status
0-110023-QA		Full stops were being stripped out of URLs included in the source code of an HTML e-mail template.	This issue is fixed.
0-104670-QA		The English translation for "Case" was present in a German install.	This issue is fixed.
0-106370-QA	Address Sharing	Context was lost when clicking on custom tabs in the Account entity.	This issue is fixed.
0-112098-QA	Comms/Diary	After creating a new task to run between 10:00 and 16:00, it was not possible to create a new appointment for the same time - the time between 10:00 and 16:00 was blocked out in the meeting planner.	This issue is fixed.
0-94832-QA	Comms/Diary	When creating a new task, the Company and Person fields were automatically filled with the data from the last entry in the Task List in MyCRM   Calendar.	This issue is fixed.
0-108409-QA	CTI	An error occurred on the CTI call screen.	This issue is fixed.
0-105799-QA	Customization	Custom pages were not accessible from the page history.	This issue is fixed.
0-101717-QA	Customization	Duplicate items were created in the Recent list whenever the SetContext() function was used.	This issue is fixed.

<b>0-109793-QA</b>	Deduplication	When sending a mass e-mail to a group and choosing more than one group on the "Dedupe against other Group" option, it appeared to only dedupe against one of the groups selected.	This issue is fixed.
<b>0-92945-QA</b>	Document Plugin	An error occurred when attempting a mail merge	This issue is fixed.
<b>0-110599-QA</b>	E-mail Client	Attachments could not be appended to forwarded e-mails.	This issue could not be reproduced.
<b>0-91987-QA</b>	E-mail Client	When replying to all on an e-mail, all the addresses in the CC field were being lost.	This issue is fixed.
<b>0-101726-QA</b>	Exchange	Using Exchange sync, when creating an appointment from Outlook to CRM, the territory was always set to Worldwide. Therefore users who were not in the Worldwide territory could not see their appointments in CRM.	This issue could not be reproduced.
<b>0-107733-QA</b>	Install / Upgrade	An error occurred when installing patch 6.2e.	This issue is fixed.
<b>0-107653-QA</b>	Install / Upgrade	An error occurred on the v6.2update.es when upgrading from 6.2SP1 to 6.2e.	This issue is fixed. Before the upgrade, the UsrA_UserAgent field needs to be changed to ntext.
<b>0-41304-QA</b>	Library and Templates	After creating a new tab with a systemact of librarylist and then uploading a new document, the uploaded document was not visible.	This issue could not be reproduced.
<b>0-111135-QA</b>	Order Entry / Products	Billing and shipping addresses were treated as the same address when the first 19 characters in the add_address1 field were the same,	This issue is fixed.
<b>0-101761-QA</b>	Outlook Integration	An error occurred after creating a new task and performing a sync with Outlook.	This issue is fixed. There was a null character (0x00) in the appointment body, which broke the sync because XML cannot contain nulls. Code was added that replaces null characters with a space.

<b>0-111163-QA</b>	Outlook Integration	Certain sensitive documents that were available only to assigned teams in CRM were available to all users in CRM via Outlook.	This issue is fixed.
<b>255-108980-QA</b>	Performance / Scalability	DB connections were left open and the system eventually crashed after writing a .NET component that used several thousand QuerySelects and adding it to a page, running the component a number of times, then repeating the process.	This issue is fixed. A new SysParam (DotNetConnectionPool) was added to allow .Net Connections to choose whether to use the connection pool. The default is 'N'. If set to 'Y', CRM will work as before. Sage CRM uses OLEDB to open database connections, and OLEDB has its own database pool implementation. What was happening in this case wasn't a memory leak, it was just the OLEDB trying to keep a connection pool large enough for the number of requests. The solution for this case is to make the .Net QuerySelect connection not use the OLEDB pool, this will make the connection be released when the Object is destroyed. After the changes, the number of connections will increase and decrease in accordance with the thread execution.
<b>0-100862-QA</b>	Quotes / Orders	The mail merge function in CRM was not returning figures for the product line in merged quote documents.	This issue is fixed.
<b>0-110204-QA</b>	Quotes / Orders	Order and quote workflow stopped functioning after applying patch 6.2c.	This issue is fixed.

<b>0-101894-QA</b>	Quotes / Orders	When creating a sales quote containing line items with totals such as £14.90, the trailing zero was missing after exporting the quote to Word.	This issue could not be reproduced.
<b>0-103207-QA</b>	Reports	An error occurred when trying to run a report in print preview mode when the company name contained an ampersand (&).	This issue is fixed.
<b>17-111273-QA</b>	Solo	SQL errors were occurring when trying to sync opportunities to Solo client machines.	This issue is fixed. The opportunities had the control char 0 in their Note fields, which was causing the SQL statements at the client to be truncated.
<b>0-114272-QA</b>	Solo	Solo users could not log in to the Solo client after upgrade to patch 6.2f.	This issue is fixed.
<b>0-106903-QA</b>	Translation (English prod)	Some spelling errors that had been present in custom captions but fixed were reinstated after applying patch E.	This issue is fixed.
<b>0-105820-QA</b>	User Interface	After upgrading to 6.2e, the Team CRM for all users was reset to "Unassigned".	This issue is fixed.
<b>0-111020-QA</b>	User Management	An error occurred when attempting to create a new user after adding a new date-only field to the More User Details panel.	This issue is fixed.

### Rolled Up Fixes

The following 6.1q fixes have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
17-95831-QA	Performance / Scalability
0-101958-QA	Reports

## Patch F

**Released** May 2010

**Files included**

DLL version	6.2.0.10
Outlook plugin	6.2.0.13
Document plugin	6.2.0.6
CTI plugin	6.2.0.4

### Patch F Issues List

Ref ID	Area	Description	Status
0-98956-QA	Call Handling	The error "Cannot save. A User with Calls Allocated to them has been removed." occurred when trying to save a new outbound call wave activity.	This issue is fixed.
0-93300-QA	Campaign Management	A newly created wave activity was not available in the Wave Activity advanced search select.	This is by design. Wave activities with a status of Pending will not be included in an opportunity's wave item advanced search select.
0-107263-QA	Comms/Diary	When e-mails that contained the + symbol were sent, the + symbol was stripped out.	This issue is fixed.
0-107789-QA	Companies / People	It was not possible to sort by any person list columns other than pers_fullname.	This issue is fixed.
0-107482-QA	Companies / People	When trying to add a new company to an appointment, the Company name field was automatically populated with the company name of the last task shown on the Calendar Task List.	This issue is fixed.
0-104610-QA	Core Product	An error occurred when trying to input any user agent string preceded with the word "Mozilla".	This issue is fixed.

Ref ID	Area	Description	Status
<b>0-96165-QA</b>	Core Product	Dates prior to 1800 were not saving to the Date/time field.	This issue has been fixed for dates equal to and after 01/01/1753 at 00:00. Values for datetime earlier than January 1, 1753 are not permitted in SQL Server. The minimum value for a datetime field in SQL Server is 1753, because this was the first full year after Britain adopted the Gregorian Calendar.
<b>0-105845-QA</b>	Customization	Search results for a newly created custom entity were available from the Find   Custom Entity screen before any search criteria were entered.	This issue is fixed.
<b>204-24039</b>	Customization	The PostInsert script appeared not to fire when it was set to Entity Level.	This is by design.
<b>0-92649-QA</b>	Customization	It was not possible to add entries to an intelligent selection list.	This issue is fixed.
<b>0-80537-QA</b>	Customization	After changing the CommunicationTaskList to order by Comm_DateTime, the list was still ordered by Priority.	This issue has been fixed. You can set any column on CommunicationTaskList to be the default sort column. If you don't set any column, the system defaults to order by Comm_DateTime.

Ref ID	Area	Description	Status
255-41924-QA	Document Plugin	An error occurred when attempting to merge a document containing vertically merged cells.	This is by design. The Export To Word button is used for sending quotes, and it merges opportunity items as well. When it is merging opportunity items, it expects to find a table in the merge document that conforms to the guidelines for a Quote Merge doc, which does not allow for vertically merged fields. However, if you right click New   Document, this only merges opportunity data to the document and does not try to do anything with the table.
0-103915-QA	Document Plugin	After editing a document that was saved as an attachment with a filed e-mail, the document disappears from the list of documents.	This issue is fixed.
0-109214-QA	Document Plugin	Users were logged off when they opted not to install the Sage CRM Document Plugin.	This issue cannot be fixed and is related to Internet Explorer 8. In IE8, Microsoft has increased the level of "Data execution prevention", which causes most ActiveX plugins problems with installing. There is a workaround - uncheck the Tools   Internet Options   Advanced   "Enable memory protection to help mitigate online attacks" option.
0-90667-QA	Document Plugin	The macro did not run automatically when trying to perform a mail merge from a Word template.	This issue is by design. An enhancement request has been logged.

Ref ID	Area	Description	Status
0-32913	Documentation	When archiving in User Activity, the log was placed on the root of the installation folder, instead of storing it with the system logs.	This issue is fixed. The UserActivityArchive.csv file is saved in the Logs folder.
0-106484-QA	E-mail Client	The timestamp on sent e-mails was wrong by an hour.	This issue is fixed.
0-107335-QA	E-mail Client	Extended characters in e-mails were being encoded incorrectly.	This issue is fixed.
0-101881-QA	E-mail Client	FCKEditor/default/css/fck_editorarea.css was being accessed on port 80 when opened under HTTPS when it should be accessed on port 403.	This issue is fixed.
426-101378-QA	E-mail Manager	Some e-mails were not getting filed correctly when using a POP profile with E-mail Manager.	This issue is fixed.
410-104184	Hosting	Icons were missing from Administration   Customization.	This issue is fixed.
319-104799	Hosting	The Manage Relationship Types feature was not working on hosted installs.	This issue is fixed.
309-81861-QA	Hosting	CSS was not correctly applied to CRM on a 6.2 hosted install.	This issue is now fixed. Hosted installs are now themes-aware.
309-74100-QA	Hosting	After uploading a logo on a French hosted install, the success caption was in English.	This issue is fixed.
309-74134-QA	Hosting	There was a typo on the Quick Start page of a French hosted install.	This issue is fixed.
255-76573-QA	Hosting	The Workflow For Companies and Workflow For People fields were not available on the hosted environment.	This is by design.
309-88161-QA	Hosting	A number of custom ASP pages were not working on a hosted install.	This issue is fixed.
0-33339	Leads	When attempting to edit an existing selection list item using inline translations, all caption codes and translations for that field were deleted.	This issue could not be reproduced.

Ref ID	Area	Description	Status
0-99137-QA	Library and Templates	Images were broken in an e-mail sent from an HTML-coded e-mail template.	This issue is fixed.
0-106558-QA	Notification	The Email Reminder escalation rule threw a number of unexpected errors when accessing a custom page.	This issue is fixed.
0-107205-QA	Opportunities	An error occurred when trying to merge a document from an opportunity.	This issue is fixed.
0-100222-QA	Outlook Integration	A POP 3 account no longer synched to CRM after a second, Exchange, account was added.	This is by design. Adding an Exchange account to the Outlook client effectively changes the default account for that Outlook client.
0-103304-QA	Outlook Integration	No e-mails were sent after the Send Immediately When Connected option was deselected.	This issue is fixed.
0-98684-QA	Performance / Scalability	CRM became unstable after Windows Updates were installed.	This issue is fixed.
0-105380-QA	Performance / Scalability	Users on a 6.2 install with Classic Line Integration experienced sporadic access violation errors.	This issue is fixed.
3-29883	Performance / Scalability	A newly created table failed to add any indexes, which had an adverse effect on performance.	This is by design.
0-102263-QA	Performance / Scalability	A CRM 6.2 install with PRO ERP 75 integration demonstrated memory leak issues.	This issue cannot be fixed. The memory leak is in third-party code that we have no control over.
0-101847-QA	Performance / Scalability	Some memory leak issues were experienced, where the w3wp.exe process kept rising until the system eventually crashed.	This issue is fixed.
0-102864-QA	Quotes / Orders	Integration failed after amending a number of orders.	This issue is fixed.

Ref ID	Area	Description	Status
<b>0-105499-QA</b>	Quotes / Orders	Line items not showing German special characters in quote or order mail merge.	This issue is fixed. The mail merge .DAT file is saved as Unicode or UTF-8, depending on how the user has their delimiter preference set (if it's tab, then the document will be saved as Unicode, otherwise it will be saved as UTF-8).
<b>0-97145-QA</b>	Reports	When running CRM v6.2c, in a Windows Server 2003 R2 environment, with Excel 2003 SP3, the EXCEL.EXE process continued running after exporting a report using the Export (XLS) option.	This issue is fixed.
<b>0-42655-QA</b>	Reports	The list of fields available in the Select Column list when creating a new report are ordered by field name instead of by translations.	This is by design.
<b>0-110735-QA</b>	Security Management	A user with specific rights to numerous territories could no longer create or view companies.	This issue is fixed.
<b>255-60656-QA</b>	Self Service	It was not possible to initialize the eWare Self Service object from within a .Net application.	This is by design.
<b>0-92443-QA</b>	Soap Integration	The content of a multiselect field for the company entity was corrupted by the eware.dll/aisservice.asmx.	This issue is fixed.
<b>0-63497-QA</b>	Soap Integration	A tab on a newly created ASP page to display Account addresses returned no results.	This issue is fixed. The Address List on the Account tab group was losing context when it was clicked on after clicking on an ASP page on the same tab group.

Ref ID	Area	Description	Status
<b>338-45689-QA</b>	Soap Quotes / Orders	It was not possible to create an MS Word quotation containing line items using Workflow.	This is by design. If you want the Create Merge Document action to export the line items to a Word document (i.e., behave the same as the Export to Word button), you must have the word 'quote' in the name of the merge document that you select for the action. e.g. OppQuoteMerge.doc.
<b>0-78815-QA</b>	Solo	When a search on a Solo client was filtered by City, and the city searched on contained an extended German character, only upper case instances of the city were returned - NÜRNBERG but not Nürnberg.	This is by design and is a known issue with SQLite. The default configuration of SQLite only supports case-insensitive comparisons of ASCII characters.
<b>0-105820-QA</b>	User Interface	After upgrading to 6.2e, the Team CRM for all users was reset to "Unassigned".	This issue is fixed.
<b>0-109625-QA</b>	User Management	The default Team appeared to lose Opportunities, although clicking off the team and then back onto it caused the Opportunities to appear again.	This issue is fixed.
<b>0-53536-QA</b>	Web Services	It was not possible to update an opportunity via Web Services.	This issue is fixed.
<b>0-102671-QA</b>	Web Services	Deleting an individual person not attached to a company did not delete the corresponding address records.	This is by design. Once an individual has been deleted, the associated address has no longer got a context, so the links are not deleted. The links for individuals associated with a company are deleted to prevent addresses being available when the company addresses are accessed.

Ref ID	Area	Description	Status
0-99646-QA	Workflow	In Opportunity workflow rules, the Assigned To field is mandatory. However, after applying patch D of 6.2, the system is allowing the workflow to be saved without filling the Assigned To field in the Opportunity Progress Action page.	This issue is fixed.
0-106649-QA	Workflow	An error occurred when attempting to send an e-mail with #pers_emailaddress# in the To field.	This issue is fixed.
0-57615-QA	Workflow	When customizing the lead workflow to use the Workflow Action Set Column Value for lead_secterr = #user_primaryterritory#, the lead's territory was "User's Home Territory". However, after clicking Change, the Territory changed to "Unknown".	This issue is fixed. It is now possible to use the Set Column Value workflow action for a territory select field and set the value to be from a #value field, e.g. #user_primaryterritory#.

### Rolled Up Fixes

The following 6.1p fixes have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
0-104227-QA	Quotes / Orders
0-106047-QA	Outlook Integration
0-66525-QA	Documentation

## Patch E

**Released** January 2010

**Files included**

DLL version	6.2.0.8
Outlook plugin	6.2.0.11
Document plugin	6.2.0.5
CTI plugin	6.2.0.4

### Patch E Issues List

Ref ID	Area	Description	Status
0-92014-QA		The user's security profile was not properly controlling their Lead communication rights.	This is by design. If you reassign a lead, non-admin users will see the lead but will not see the related comm record. The comm record must be reassigned explicitly. Once you reassign the comm record, non admin users will see the comm record too.
0-91636-QA	.Net	It was not possible to set a screen to be displayed in the top content area with the CRM.GetCustomEntityTopFrame function in the .NET framework.	This issue is fixed.
0-92957-QA	Address Linking	Nothing happened when selecting the Address Linked check box on the People panel of the Addresses tab in edit mode.	This issue is fixed.
0-91036-QA	Call Handling	Two calls were appearing in the Call List attempt column, even though the user made only one call.	This issue is fixed.
0-98477-QA	Cases	When adding a new person to a case from the web picker, deduplication occurred against all companies in the database instead of just the company in the context of the case.	This issue is fixed.
0-74824-QA	Cases	It was possible to add a person to a company case, even though the person was not associated with the company.	This issue is fixed.
0-89813-QA	Comms/Diary	New fields added to the Communication Top Content screen were not being displayed.	This issue is fixed.
0-87648-QA	Comms/Diary	When viewing tasks in month view on the Calendar screen, the full hyperlink details were displayed for both the task Person name and Company name.	This issue is fixed.

Ref ID	Area	Description	Status
0-92146-QA	Comms/Diary	Company and person details in a new appointment were filled out automatically with the company and person details of the last appointment/task in the list.	This issue is fixed.
0-89684-QA	Companies / People	The top four communications on the Quick Look tab in the context of a company were sorted by status instead of by date/time.	This is by design. There is no column on the Quick Look grid that points to any date/time information.
0-87038-QA	Companies / People	Person records were being duplicated instead of edited when the person type was changed.	This issue is fixed.
0-87834-QA	Companies / People	It was possible to save a record against a company that had been deleted.	This issue is fixed.
0-87389-QA	Component Management	A newly created button component was not visible when imported to another instance of CRM.	This issue is fixed.
0-90078-QA	Component Management	When using the Component Manager to move reports from one server to another, the component did not update the custom_reportsearches table correctly.	This issue is fixed.
0-89224-QA	Configuration	It was not possible to change the lookup selection for countries in the Addresses tab.	This issue is fixed.
255-92966-QA	Core Product	Duplicate vSearchListPerson entries were being made in the custom captions table.	This issue is fixed.
0-88087-QA	Core Product	An error occurred after clicking the link to a custom page in CRM - <a href="http://www.sage.de/elearning/einstein.html">http://www.sage.de/elearning/einstein.html</a> .	This issue is fixed.
0-91017-QA	Currency	When creating a quote for a foreign currency with a different number of decimal places than is specified in User Preferences, the quote picked up the number of decimal places from the foreign currency and not from the preferences.	This issue is fixed.
0-88924-QA	Customization	It was not possible to specify a filter box name and also define custom content.	This is by design. The same screen is used when customizing 'Screen' and 'List' objects.

Ref ID	Area	Description	Status
0-88914-QA	Customization	An error occurred when attempting to manually construct a list based on a view with a derived column.	This issue is fixed.
0-89387-QA	Customization	An error occurred when the Relationships tab was removed from a newly created entity. The entity had been created using the Main Entity Wizard with all the boxes except "For Dot Net" selected, and had a record added to it.	This issue is fixed.
0-83684-QA	Customization	It was not possible to create a new Text With Check Box Search field.	This issue is fixed.
0-90042-QA	Customization	The Current Date Plus Delta Mins was not setting the task expiration/delivery date as expected.	This issue is fixed.
0-88031-QA	Customization	Filtering was not working properly on a custom ListPage.	This issue is fixed.
0-89986-QA	Customization	There was no active link on a search select advanced field.	This issue is fixed.
0-90266-QA	Customization	Validation was preventing the creation of more than one PersonProgress table with the pers_ prefix.	This issue is fixed. When a user attempts to save a table that uses the same column prefix the following warning message is displayed: "The Column Prefix you specified is a duplicate. If you are sure you want to create a new table using this duplicate prefix select Save. If not, change the Prefix and Save". The user then has the option to select save to create the table with the duplicate prefix.
0-89874-QA	Customization	Some simple ASP code was getting stuck in a loop whilst trying to execute the SaveChanges() command.	This issue is fixed.
0-90048-QA	Customization	Context was lost when clicking on a tab using the run block action to move to a custom entity or table on the next tab.	This issue is fixed.

Ref ID	Area	Description	Status
0-89414-QA	Customization	Component Manager created a view as a table, which prevented a component being installed correctly.	This issue is fixed.
0-90222-QA	Customization	It was possible to click backward through the history of custom pages, but it was not possible to click forward.	This issue is fixed.
0-92925-QA	Customization	When an entity with multiple fields with the same name in between the first & second underscore, the fields without the second underscore were shown as selected in the search select advanced set up screen.	This issue is fixed.
0-93144-QA	Customization	Incorrect data was returned when running table level scripts on the Communication entity Values('comm_communicationid').	This issue is fixed.
0-93072-QA	Customization	A filter box on a custom ASP page was not getting correctly applied to its intended list.	This issue is fixed.
0-86295-QA	Customization	An error occurred when creating a case from a custom ASP page from workflow.	This is by design.
0-87732-QA	Customization	An error occurred after customizing the theme.	This issue is fixed.
0-87477-QA	Customization	A project was not getting linked properly under Team CRM.	This issue is fixed.
0-88106-QA	Customization	An error occurred when trying to create a custom ASP page.	This issue is fixed.
0-88680-QA	Customization	The company context was lost after clicking a custom tab twice.	This issue is fixed.
0-92868-QA	Dashboard	An error occurred when clicking on the date filters in the Favorite reports module on the Dashboard.	This issue is fixed.
0-87321-QA	Data Upload	Data Upload was not validating required fields.	This issue is fixed.
0-84317-QA	Data Upload	An error occurred when trying to upload an Excel spreadsheet on an XP machine.	This issue is fixed.

Ref ID	Area	Description	Status
<b>0-91202-QA</b>	Data Upload	There was a problem with the field linking for the company business number after uploading company data from a CSV file.	This issue is fixed.
<b>0-92270-QA</b>	Data Upload	When using the Data Upload merge rule to merge duplicate data with current data, Company Business Email Address was merged only once.	This issue is fixed.
<b>0-98511-QA</b>	Deduplication	Deduplication caused a case record to be saved against a person record in a different context to the one in which the case was raised.	This issue is fixed.
<b>0-91005-QA</b>	Deduplication	Deduplication was not working when modifying a company.	This issue is fixed.
<b>0-98989-QA</b>	Document Plugin	It was not possible to delete e-mail attachments on e-mails that had been filed to CRM.	This issue is fixed. When deleting an attachment, it is important to remove the attached file from the Files content field, so that it isn't used for sending or reloading the e-mail.
<b>0-96481-QA</b>	Document Plugin	After merging a task or communication, the territory was set to the territory of the user who created the merge, and the communication was stored to the user's territory.	This issue is fixed.
<b>0-90691-QA</b>	Document Plugin	An error occurred when attempting to create a new local template after searching for a Lead and drilling down into it.	This issue is fixed.
<b>0-87471-QA</b>	Document Plugin	After doing a mail merge and then saving the document, the document was saved as a ZIP file instead of a DOC file.	This issue is fixed.
<b>0-90667-QA</b>	Document Plugin	The macro did not run automatically when trying to perform a mail merge from a Word template.	This issue is fixed.

Ref ID	Area	Description	Status
0-96852-QA	E-mail Client	Mass e-mails generated using an e-mail template were not displaying a comma as a thousand separator as expected.	This issue is fixed.
0-89242-QA	E-mail Client	When sending an e-mail from CRM containing the text "File:", the error "The E-mail may contain references to local files" was returned. However, after changing the text to "File :", the mail was sent correctly.	This is by design. When there is a space between the word file and the colon, the system will not recognize this as a reference to a local file.
0-85437-QA	E-mail Client	When a user replied to an e-mail in CRM by clicking the Reply All button, their name was added to the name of recipients.	This issue is fixed.
0-90298-QA	E-mail Client	Any mailto: links in e-mails created in the e-mail editor were not being encoded correctly.	This issue is fixed.
0-92070-QA	E-mail Client	An error occurred when selecting All in the For Entity field in any of the standard e-mail templates.	This issue is fixed.
0-91987-QA	E-mail Client	When replying to all on an e-mail, all the addresses in the CC field were being lost.	This issue is fixed.
0-93473-QA	E-mail Client	The From e-mail address changed after a local attachment was uploaded.	This issue is fixed.
0-93482-QA	E-mail Client	The wrong From address was used after a local attachment was uploaded.	This issue is fixed.
0-98463-QA	E-mail Client	E-mails with attachments sent from CRM were received by Outlook as blank messages with the message body appended as an attachment.	This issue is fixed.
0-88820-QA	E-mail Client	After filing e-mails with inline images to CRM, some of the images no longer displayed.	This issue is fixed.
0-90201-QA	E-mail Client	Task and Appointment SMS alerts were not working when addresses were separated by a semi colon.	This is by design. Addresses should be separated by a comma, not a semi colon.

Ref ID	Area	Description	Status
0-95739-QA	E-mail Manager	Inline images contained in e-mail messages were being displayed as HTML attachments.	This issue is fixed.
0-103790-QA	E-mail Manager	Applying hotfix 4 to a 6.2d install overwrote the support.js file.	This issue is fixed.
255-98759-QA	Find / Advanced Find	Exported files were not formatted into columns when opened via Excel.	This is by design. The default encoding for files exported to CSV is UTF8. This can be set with the hidden system parameter 'ReportEncoding' = UTF8 or UNICODE. CSV files will be displayed properly in Excel only if the Tab separator is used. For the comma and semicolon separators, data will not format correctly in Excel. UTF8 encoding will make CSV work with all separators, but only if they are consistent with the regional setting list separator.
255-101669-QA	Find / Advanced Find	Data was not separated into columns when a file was exported to CSV, and foreign characters were corrupted.	This issue is fixed. Note: If the delimiter is set to Tab, the exported file will always be encoded in UNICODE format. If the delimiter is set to Comma or Semi-Colon, the exported file will be encoded as UTF-8.
0-91847-QA	Find / Advanced Find	An error occurred after selecting Advanced Find and then choosing an Advanced Find from the select box.	This issue is fixed.
0-99482-QA	Groups / Target Lists	It was not possible to send mass e-mails from a group based on a view on a primary entity that contained duplicate rows on the primary key, or a Find screen that used this view.	This issue is fixed.

Ref ID	Area	Description	Status
<b>0-87575-QA</b>	Groups / Target Lists	After creating a view from case and a group based on the view and then performing a mass mail merge, communications were recorded against the person associated with the group instead of against the case.	This is by design. There are no fields to store the case, quotes, orders ID in the comm_link table. It provides fields to store company, person or lead IDs - so if a mail merge is performed on a group of company, person, or lead records, the communications will be stored against those record IDs.
<b>0-99010-QA</b>	Install / Upgrade	System views were overwritten after a patch upgrade.	This is by design. Note: A common error can occur when a standard Sage CRM view has been modified in the implementation to include specific fields. During the upgrade process, CRM checks all of the standard views against the expected view. If it finds a standard view is in any way different from what was expected, it will log an error, retain the current view syntax, and add the upgraded view with the view name appended with _New. For these cases, it is important to ensure that the only change to the affected view is the additional fields that had been added prior to the implementation. A warning message is now displayed when a user attempts to edit a system view.
<b>0-90512-QA</b>	Install / Upgrade	The meeting planner was missing from the neutral theme after an upgrade.	This issue is fixed.

Ref ID	Area	Description	Status
<b>0-94788-QA</b>	Key Attribute Data	An error occurred when trying to access the Key Attributes tab in certain company records.	This issue is fixed.
<b>0-89393-QA</b>	Key Attribute Data	After creating a new Person group and including Key Attribute data, hundreds of duplicate entries appeared in the group.	This issue is fixed.
<b>0-83660-QA</b>	Key Attribute Data	When new companies were added to a key attribute group, a message displayed to say the company records that had been added had been deleted.	This issue is fixed.
<b>0-90325-QA</b>	Key Attribute Data	After saving key attribute data for two panels, only one key attribute panel was visible.	This issue is fixed.
<b>0-90451-QA</b>	Key Attribute Data	The German translation for the warning message that displays when trying to delete key attribute entries was missing.	This issue is fixed.
<b>0-95088-QA</b>	Key Attribute Data	An error occurred when trying to access the Key Attributes tab after upgrading to 6.2c.	This issue is fixed.
<b>0-89017-QA</b>	Leads	It was not possible to save Lead Communications if the Regarding field was set as required.	This issue is fixed.
<b>0-90189-QA</b>	Library and Templates	When creating a new e-mail, it was not possible to type in the search box for the required e-mail template because the search box kept refreshing after the first character was entered.	This issue is fixed.
<b>0-93776-QA</b>	Mobile	An error occurred when searching from a mobile device for a company with no default person.	This issue is fixed.
<b>0-79622-QA</b>	Navigation	The user was taken to the Quote summary screen after clicking Continue on the Opportunity Summary tab.	This issue is fixed.

Ref ID	Area	Description	Status
0-90637-QA	Navigation	After editing an existing record belonging to a custom entity in the Admin area, then returning to the Main Menu, some custom pages were getting mixed up.	This issue is fixed.
0-89023-QA	Order Entry / Products	When performing a Mail Merge for a quote or order, any blank New Comment Line Item entries were displaying as the value 0.00 for the price columns. These fields should remain blank because 0.00 is actually entered into the EwareQuote00.dat file and will be reflected in the merge.	This issue is fixed.
0-99004-QA	Outlook Integration	An error occurred after running an SQL query on the database.	This issue is fixed.
0-96595-QA	Outlook Integration	After creating a new appointment on a French install of CRM and syncing with Outlook, the company field was not translated ("Customer" instead of "Client"), and the communication fields were not merged.	This issue is fixed.
0-99773-QA	Outlook Integration	An error occurred when trying to sync with Outlook on a Vista machine.	This issue is fixed.
0-89916-QA	Outlook Integration	The Sync button disappeared from Outlook when working over a VPN.	This issue is fixed.
0-79184-QA	Performance / Scalability	An SQL error occurred when calling products after integration.	This issue is fixed.
17-98734-QA	Performance / Scalability	The Related Entities .Net DLL was not releasing memory.	This issue is fixed.
0-101218-QA	Performance / Scalability	An error occurred when trying to open a company record.	This issue is fixed.
17-95831-QA	Performance / Scalability	An error occurred when using code including the ProcessTab reference.	This issue is fixed.
0-96896-QA	Performance / Scalability	Errors occurred when running reports or when accessing Administration   System.	This issue is fixed.
0-101000-QA	Quotes / Orders	An escalation rule created to send an e-mail was sending two e-mails in error.	This issue is fixed.

Ref ID	Area	Description	Status
0-91196-QA	Related Entities	An error occurred on a company's Relationships tab when working with multiple installs of CRM.	This is by design. There is one SageCRMNet.dll per CRM install (found in the CRMDotNet\ <version&gt;\ affect="" all="" any="" crm="" file="" folder).="" installs="" of="" same="" td="" the="" this="" upgrade="" version.<="" will="" with=""> </version&gt;\>
0-88302-QA	Related Entities	An error occurred on the Related Entities tab for a custom .NET entity.	This issue is fixed.
0-99928-QA	Reports	An error occurred when trying to run an Opportunities report.	This issue is fixed.
0-100585-QA	Reports	An SQL error occurred every time a report was run with the user's primary team was in the report criteria.	This issue is fixed.
0-89432-QA	Reports	The date formatted in a report exported to Excel was back to front - when set to dd/mm/yyyy, the date was displaying as yyyy/mm/dd.	This issue is fixed.
0-90351-QA	Reports	A report was displaying in English instead of German.	This issue is fixed.
0-87020-QA	Reports	An error occurred when trying to run a summary report when the Descending check box was selected.	This issue is fixed.
0-91323-QA	Reports	An error occurred when trying to run a report after upgrading to version 6.2.	This issue is fixed.
0-92990-QA	Reports	When running a report with a chart count, the count said 1 even though the Select Distinct Values option was selected.	This issue is fixed.
0-87798-QA	Reports	An error occurred when trying to create a report based on the vSearchListCommunication view.	This issue is fixed.
0-66459-QA	Security Management	A user could access documents to which they had no access rights by manipulating CRM URLs.	This issue is fixed.

Ref ID	Area	Description	Status
0-90319-QA	Security Management	Users were able to access restricted records via their recent list.	This issue is fixed.
0-90727-QA	Security Management	After renaming a territory, the Modified Territory Name field defaulted to the capt_code or terr_caption value instead of the corresponding translation.	This issue is fixed.
0-85963-QA	Security Management	The order of territories was lost after a rebalance was performed.	This issue is fixed.
0-90554-QA	Security Management	Users were able to access restricted records via their recent list.	This issue is fixed.
0-88386-QA	Self Service	Currency symbols were garbled on Self Service.	This issue is fixed.
0-99106-QA	Soap Integration	When an opportunity was created by the ERP system because an order was synchronised, the Oppo_PrimaryCompanyId field remained blank.	This issue is fixed.
0-92443-QA	Soap Integration	The content of a multiselect field for the company entity was corrupted by the eware.dll/aisservice.asmx.	This issue is fixed.
0-89381-QA	Soap Integration	An error occurred when performing an advanced find on a Group Code field.	This issue is fixed.
0-88247-QA	Soap Integration	After changing a company's territory, the territory of its default account and default person remained the same.	This issue is fixed.
0-67194-QA	Soap Integration	After making an entry into the ERP system field, CRM performed a postback and the Company field re-populated with the company name. Even when the company field was cleared again when the account was saved, the company field re-populated again.	This issue is fixed. If you remove the default company when you try to create an account, CRM will save the account without a default company.

Ref ID	Area	Description	Status
<b>65-86450-QA</b>	Soap Integration	When a person was added to a company that was linked to an account, the account name was not displayed in the top content area of that Person's summary screen.	This issue is fixed.
<b>0-89805-QA</b>	Soap Integration	The Account Summary Report used the vReportAccount view to pull data, even though the screen definition was associated with the vReportSummaryAccount view.	This issue is fixed.
<b>0-91606-QA</b>	Soap Integration	A real-time data drill-down list crashed when there was a character in the drill-down key.	This issue is fixed.
<b>0-91413-QA</b>	Soap Quotes / Orders	When attempting to change the Pricing List, it was possible to select all price lists - both active and inactive.	This issue is fixed.
<b>0-96058-QA</b>	Soap Quotes / Orders	An error occurred when viewing or creating Quotes.	This issue is fixed.
<b>0-92996-QA</b>	Soap Quotes / Orders	It was not possible to enter more than 7 digits in the Quantity and Quoted Price fields on the Quote screen.	This issue is fixed.
<b>0-90527-QA</b>	Translation (English prod)	The German translation for Order was missing from the Recent list.	This issue is fixed.
<b>0-85891-QA</b>	User Interface	When working with custom pages on My CRM, on performing a right click action on the My CRM button on the left pane and selecting the custom page, the top content was missing.	This issue is fixed.
<b>0-92430-QA</b>	User Interface	When creating a new case and trying to add a new person, the Select Person link was not working in the Deduplication screen.	This issue is fixed.

Ref ID	Area	Description	Status
0-89702-QA	User Management	After clicking the user_territoryprofile selection list in Administration   Customization   Users, then clicking Cancel and selecting the same selection list again, the previously displayed list of territory profiles was blank.	This is by design. The first time you enter this screen a list of territory profiles are displayed. Subsequently the territory list is displayed as empty and will remain so until the user refreshes the database.
0-87185-QA	User Management	The names of newly created teams were not appearing in the Team CRM view - a number was displayed instead.	This issue is fixed.
0-87953-QA	User Management	The wrong information was displayed on the User Summary tab in Administration - > Users -> User Activity.	This issue is fixed.
0-91672-QA	User Management	An error occurred after a new Date Only field was added to the User table and trying to create a new user.	This issue is fixed.
0-93233-QA	Web Picker	The Person Search Select Advance drop-downs and Person searches were not working as expected.	This issue is fixed.
0-88960-QA	Web Services	Case tracking notes were deleted when a new person was added to the case and that person was merged with an existing company.	This issue is fixed.
0-90697-QA	Web Services	It was possible to obtain information about tables not exposed to web services using the getmetadata method.	This issue is fixed.
0-98881-QA	Workflow	The '#recordanchor#' tag was not working from Escalation Rules.	This issue is fixed.
0-88454-QA	Workflow	E-mails generated from the case workflow were not displaying address information.	This issue is fixed.
0-88344-QA	Workflow	It was not possible to use a different view for the New Case workflow.	This issue is fixed.

Ref ID	Area	Description	Status
255-90963-QA	Workflow	Sending SMS as part of a workflow did not work when the tags #lead_assigneduserid# and #user_mobilenumber# were added to the SMS To Number field.	This issue is fixed. Note: The #user_mobilephone# tag should be added to the SMS To Number field to get the assigned user's mobile phone number. The #lead_assigneduserid# tag will return the user's e-mail address.
0-90421-QA	Workflow	After creating an escalation rule to send an e-mail and setting the interval to 60, only two e-mail events were triggered.	This issue is fixed.
0-94491-QA	Workflow	An error occurred on the opportunity progress screen when workflows were enabled and where the decimal point symbol was set to a comma in the Number Preferences field.	This issue is fixed.
0-88417-QA	Workflow	The cmli_smsmessagesent field could not be set for an Escalation Rule.	This issue is fixed.

## Rolled Up Fixes

The following 6.1o fixes have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
405-102417-QA	
435-99073-QA	Companies / People
0-90397-QA	CTI
0-96381-QA	Customization
0-96152-QA	Dashboard
0-101332-QA	E-mail Client
0-98165-QA	Key Attribute Data
0-95190-QA	Leads
0-95227-QA	Outlook Integration
0-93671-QA	Outlook Integration
0-96569-QA	Outlook Integration
0-94393-QA	Soap Accounts
17-101017-QA	Solo
0-98345-QA	Solo

## Patch D

**Released** September 2009

**Files included**

DLL version	6.2.0.7
Outlook plugin	6.2.0.9
Document plugin	6.2.0.5
CTI plugin	6.2.0.4

### Patch D Issues List

Ref ID	Area	Patch Release Notes	Patch Release Status
<b>0-82329-QA</b>	.Net	A number of errors occurred when using the FindRecord method.	This issue is fixed.
<b>0-87433-QA</b>	.Net	The EntryType property is read-only, which was causing problems when trying to add client-side customizations.	<p>This issue is by design. The EntryType property will continue to be read-only, but now it is possible to inherit from Sage.CRM.Controls.Entry and define the CRM type on constructor time.</p> <p>From Sage.EntryTypes enum, the following types have now CRM side support: (Text, MultiText, EmailText, UriText, Select, Integer, DateTime, Date, CheckBox, Password, AdvSearchSelect, SelectTable, CustomDotNet). The others types in the enum (SearchSelect, UserSelect, MultiSelect, ChannelSelect, ProductSelect, TargetListSelect, Currency, Territory) will have the support added in a future CRM version after detailed analysis.</p>
<b>0-90814-QA</b>	Address Linking	The number of addresses displayed on the Company Address tab was not correct.	This issue is fixed.
<b>0-53996-QA</b>	Advantage ProSeries Integration	It was not possible to import customer data from ERP to CRM.	The issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-91914-QA	Call Handling	The Got Through call date and time was incorrect in call reports.	This issue is fixed.
0-81186-QA	Campaign Management	A report created using vWaveltemWaveCampaign contained a wave campaign that had been deleted.	This issue is fixed.
0-81903-QA	Campaign Management	After clicking the Refresh Call List button a new call list was not created from a newly selected group.	This issue is by design. Refresh Call List can be used in two ways: 1) It allows new records to be added to the existing call list if the call list is based on a dynamic group and more records have been added to the Database that match the groups query since the call list was created or last refreshed.  2) It allows new records based on a different group to be added to the already created call list.
0-79967-QA	Comms/Diary	The context for the Regarding field was retained when selecting a new task for an Opportunity.	This issue is fixed.
0-81897-QA	Comms/Diary	No hyperlink was available from the Task details to the associated Person and Company.	This issue is fixed.
0-57500-QA	Comms/Diary	No new task was created when the Follow-up Task check box was selected.	This issue is fixed.
0-82831-QA	Comms/Diary	After sending an e-mail containing a BCC to an address or user, it wasn't possible to see who had sent the email.	This issue is by design.
0-84251-QA	Comms/Diary	After creating a task or appointment and assigning it to two users or resources, the appointment was saved and booked in both users' calendars but not in their respective team calendars.	This issue is by design. The tasks are assigned to the selected team for all tasks created.
0-84502-QA	Comms/Diary	The Order By Desc and Default Order By options were not working on the CommunicationTaskList List Block.	This issue is fixed. Note: The grid behind the screen in question is "CommunicationToDoList" and when you change the order by settings there for due date, the data is displayed correctly.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-84569-QA	Comms/Diary	After creating a communication with an attachment on the person entity, the communication was stored under communication for the person's company too. However, the attachment was not available from the Shared Documents tab.	This issue is fixed.
0-91426-QA	Comms/Diary	The Libr_AccountID field was being populated with the UserID.	This issue is fixed.
0-81528-QA	Companies / People	When a new company with multiple people was created during data upload and the company's address was subsequently changed, the change was not reflected for all the company's people.	This issue is fixed.
0-46909-QA	Companies / People	The Set as Default check box was not appearing when creating a new person in the context of a company.	This issue is fixed. The Set as Default check box now appears on all New Person creation pages.
0-83326-QA	Companies / People	The match rule for postcode was ignored when modifying a record.	This issue is fixed.
0-93319-QA	Companies / People	When entering a new person in a case, the original IE screen was used instead of a new pop-up screen.	This issue is fixed.
0-74349-QA	Component Management	A newly recorded component script did not implement a new buttongroup with customfile option that was included.	This issue is fixed.
0-93239-QA	Core Product	No matter what database was specified, CRM always logged on using the default database.	This issue is fixed.
0-95233-QA	Core Product	An error occurred when a user attempted to change their Self Service password.	This issue is fixed.
0-79377-QA	Customization	The loadimage function did not load a newly saved image.	This issue is fixed.
0-81046-QA	Customization	An icon for a newly created tab group was not appearing correctly.	This issue is fixed.
0-81318-QA	Customization	The Top Content screen did not reflect changes applied in Administration   Customization   Person   Screen   Person Top Content.	This issue is fixed.
416-81644-QA	Customization	An SQL error occurred when trying to view a newly created Quote screen.	This issue could not be reproduced.
0-81355-QA	Customization	An error occurred when attempting to modify an address link.	This issue is fixed.
0-82533-QA	Customization	The CRM.Button() method was not behaving as expected.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-82445-QA	Customization	The top content on a new tab for a custom entity was not displaying correctly.	This issue is fixed.
0-83446-QA	Customization	Top content was not being displayed for a custom entity when browsed from a custom hyperlink on a list.	This issue is fixed.
0-83545-QA	Customization	Context was lost after clicking into a custom entity via the recent list.	This issue is fixed.
0-77739-QA	Customization	After creating a block name and then entering a block title, the block title did not overwrite the block name - both the block name and block title appeared on the screen.	This issue is fixed.
0-84200-QA	Customization	An error occurred when trying to edit the par_workflowid field.	This issue is fixed.
0-85551-QA	Customization	An HTTP error occurred when trying to save a new record.	This issue is fixed.
0-86662-QA	Customization	There was no e-mail template available for a newly created custom entity.	This issue is fixed.
0-89075-QA	Customization	No search results were returned when using Search Select Advanced fields on a custom entity.	This issue is fixed.
0-81174-QA	Dashboard	A dashboard saved search was not appearing correctly.	This issue is fixed.
0-86146-QA	Data Upload	An error occurred when attempting to perform a data upload from a CSV file.	This issue is fixed.
0-85380-QA	Deduplication	A deduplication warning occurred when entering a new entity that contained an umlaut, but the Continue and Go Back buttons were not available.	This issue is fixed.
0-81938-QA	Document Plugin	An error occurred when attempting a mail merge with a document containing Unicode characters.	This issue is fixed.
0-76176-QA	Document Plugin	An error occurred when working with document templates in Sage200CRM.	This issue is fixed.
0-88954-QA	E-mail client	There were issues sending e-mails containing Kanji characters.	This issue is fixed.
0-81540-QA	E-mail Client	When sending an e-mail by clicking on the e-mail address of a contact who was not a company's default contact, the generated e-mail was sent to the selected contact, but the salutation and name were those of the default contact.	This issue is by design. Company-based templates will always use the default contact. The workaround for this is to create an e-mail template on the Person entity.
0-85219-QA	E-mail Client	An error occurred when attempting to send an e-mail to a group.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-84612-QA	Exchange	The time zone kept reverting to GMT after synching with Exchange.	This issue is by design and is an Exchange problem. Exchange stores its dates in GMT, and Exchange clients are responsible to convert those to or from client time zone.
0-83139-QA	Exchange	An error occurred when synchronizing CRM and Exchange when using extended characters.	This issue is fixed.
0-84785-QA	Find / Advanced Find	A note was entered at both Company and Person level, but when attempting to filter the note, the filter didn't work correctly.	This issue is fixed.
0-80880-QA	Groups / Target Lists	An error occurred when opening a newly created group.	This issue is fixed.
0-90208-QA	Groups / Target Lists	Deduplication on mass mailing from groups was not working as expected.	This issue is fixed.
0-81656-QA	Leads	It was not possible to link two lead records to one company.	This issue could not be reproduced.
0-81955-QA	Library and Templates	All documents were displaying when a Search Select Advanced field was used to select a global document in the New E-mail window, regardless of security.	This issue is fixed.
0-82591-QA	Library and Templates	The From address was blank after creating an e-mail notification rule on an entity.	This issue could not be reproduced.
0-71008-QA	MasterCRM	There were issues downloading CSV files on sagecrm.com.	This issue is fixed. For IE 7.0 and above the setting at Tools   Internet Options   Security   Trusted Sites   Custom Level   Downloads   Automatic prompting for file downloads must be set to Enabled.
0-51126-QA	Mobile	When a newly created Key attributes tab was selected on a mobile device, it linked back to the Summary screen.	This issue is by design. Key attributes are not supported on mobile devices.
0-85115-QA	Notification	A newly created e-mail notify action was not working.	This issue is fixed.
0-82322-QA	Opportunities	The wrong count was being shown on the Opportunity pipeline.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-56944-QA	Opportunities	After the default was set to Specific Team in Administration   Customization   Opportunity   Field Name   Oppo_channelIdOpen, this field displayed as None after a new Opportunity was added.	This issue is by design. If workflow is enabled, field defaults must be set by Set Column Value actions in the primary rule otherwise they default to blank.
0-84138-QA	Order Entry / Products	There was a performance issue when trying to modify a product.	This issue is fixed.
0-47933-QA	Outlook Integration	It was not possible to file an e-mail that contained Japanese characters.	This issue could not be reproduced.
0-95814-QA	Outlook Integration	A number of issues were occurring with Outlook Integration after upgrading to patch 6.2c.	These issues are fixed.
372-89306-QA	Outlook Integration	The address type for Outlook contacts was not being set properly.	This issue is fixed.
0-82540-QA	Outlook Integration	It was not possible to log on after syncing Outlook and CRM from Outlook.	This issue is fixed. The solo sync button is no longer visible when the session is opened via Outlook.
0-83086-QA	Outlook Integration	The Send and File button was missing when synced with Outlook 2003.	This issue is by design, and is an Outlook 2003 limitation.
0-56748-QA	Performance / Scalability	There was a performance issue when reassigning a user's company and person.	This issue is fixed.
0-86978-QA	Performance / Scalability	There were performance issues, mostly when using the upper() function.	This issue is fixed.
255-96366-QA	Reports	A report was being filtered by Case_Stage instead of Case_Stage and Channel ID.	This issue is fixed.
426-80190-QA	Reports	After modifying a report to display a bar chart, the chart legend was unclear with overlapping text.	This issue is fixed.
0-83098-QA	Reports	The wrong information was being displayed on a chart when clicked into from the dashboard.	This issue could not be reproduced.
0-84746-QA	Reports	Some data was duplicated when a new cross tab report was created.	This issue is by design. In this instance, Sort On and not Group By should have been used to tidy up the report.
0-93251-QA	Reports	An error occurred when attempting to export a report to Excel.	This issue is fixed.
0-94283-QA	Reports	An SQL error occurred when trying to run a report.	This issue is fixed.
0-93648-QA	Reports	An error occurred when trying to export a report to Excel.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-94482-QA	Reports	All reports were being sorted in descending order.	This issue is fixed.
0-80939-QA	Sales Forecasting	When a manager viewed one of their subordinate's forecasts, the forecast showed as 0 and not the correct figure.	This issue is fixed.
0-84452-QA	Sales Forecasting	An error occurred when submitting a sales forecast.	This issue is fixed.
0-80872-QA	Security Management	When attempting to delete a user's home territory security profile, the user's team security profile was deleted instead.	This issue is fixed.
0-82805-QA	Security Management	After adding a note the Add New Note button disappeared.	This issue is fixed.
0-86176-QA	Security Management	The New Note button was missing on the Person and Company entities.	This issue is fixed.
0-87756-QA	Security Management	No search results were displayed after changing a user's territory and searching for the user via their Company.	This issue is by design.
0-93175-QA	Security Management	An error occurred when a user tried to change their password.	This issue is fixed.
0-88314-QA	Self Service	An error occurred when non-authenticated users attempted to browse to an ASP page that uses SelfService screen objects.	This issue is fixed.
66-57651-QA	Soap Integration	After creating an RTDV list with a filter box, the filter box name displayed in the list header.	This issue is by design. You cannot remove the label without removing the filter too. And it is possible to add a variety of content including javascript in customcontent nodes so we cannot filter on text either.
0-83211-QA	Soap Integration	The ERP Selection field was blank in a CSV file exported from a group.	This issue is fixed.
0-82732-QA	Soap Integration	It was not possible to alter the acc_currencyid field to numeric.	This issue is fixed.
204-91129-QA	Soap Integration	There was an error in the awareaccpacpro.dll.	This issue is fixed.
0-59881-QA	Soap Integration	An error occurred when Result was set to false in the GetPricingDetails() method on an ERP system.	This issue is by design. If the result is false, the errorMessage property is displayed in an exception on the CRM side.
0-96541-QA	Soap Quotes / Orders	A number of JScript errors were occurring.	This issue is fixed.
0-84732-QA	Soap Quotes / Orders	An exported Quote was not available in the SDocument library.	This issue could not be reproduced.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-85204-QA	Soap Quotes / Orders	Price information was not updated when the Recalculate Prices button was clicked.	This issue could not be reproduced.
0-85563-QA	Soap Quotes / Orders	A quote converted to an order was referenced with the same number as an order created from the same opportunity.	This issue is fixed.
0-79093-QA	Soap Quotes / Orders	New Orders could not be created on the second instance of an integration.	This issue is fixed.
0-53375-QA	Timings	When creating a new opportunity and changing stage by Workflow, the tracking did not display the duration, because there was no default business calendar. However, it was not possible to set a default business calendar via Administration   System   Timings   Business Calendar.	This issue is fixed. The business calendar is now always available.
0-89922-QA	Translation (English prod)	There was an issue when attempting to change a translation on an Oracle installation.	This issue is fixed.
0-85091-QA	User Management	After changing a team description, the change was not reflected on the user's Display Teams list.	This issue is by design. To change a Team name, go to Administration   Customization   Translations.
0-91269-QA	User Management	An error occurred when running a report.	This issue is fixed.
0-39098-QA	Web Services	When finding an existing MME NewProduct Entity using the GetDocument(identity) method, the document returned did not contain the Pricing sub document details.	This issue is closed, as it is an AIS related issue and Sage 200 has moved to the new SOAP integration technology and is no longer using AIS.
0-74633-QA	Web Services	The addrecord method was not working like the add method, as expected.	This issue is by design.
0-82031-QA	Workflow	A mail merge action in a custom entity workflow was not working as expected.	This issue is fixed.
66-54370-QA	Workflow	It was not possible to edit an e-mail address in the Workflow Send E-mail action.	This issue is fixed.
0-83539-QA	Workflow	Opportunity workflow information was displayed erroneously to the right of the Task screen.	This issue is fixed.
0-89617-QA	Workflow	When an escalation had a workflow action of Set Column Value, and Use Escalation Service was set to Yes, the action only fired if there was an On Screen Notification action on the same escalation.	This issue is by design.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-82901-QA	Workflow	There was a problem when sending mail from the escalation service.	This issue is fixed.
0-85292-QA	Workflow	There was an issue when attempting to send out an email via workflow.	This issue is fixed.
0-94374-QA	Workflow	Entities were getting corrupted with data from previously edited entities when a workflow rule was triggered that had already been triggered by another user.	This issue is fixed.

### Rolled Up Fixes

The following 6.1n have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
0-85865-QA	
0-93703-QA	Call Handling
0-91978-QA	Comms/Diary
0-81475-QA	Comms/Diary
0-85710-QA	Comms/Diary
0-87167-QA	Companies / People
0-82892-QA	CTI
416-89807-QA	CTI
0-89357-QA	Customization
255-90784-QA	Customization
0-87714-QA	E-mail Manager
0-85982-QA	Groups / Target Lists
17-89201-QA	Install / Upgrade
0-87563-QA	Performance / Scalability
0-63257-QA	Reports
0-90054-QA	Reports
0-87792-QA	Reports
0-94918-QA	Security Management
0-65297-QA	Security Management
0-90575-QA	Security Management
0-87495-QA	Solo
0-90902-QA	Workflow

## Patch C

**Released** June 2009

**Files included**

DLL version	6.2.0.5
Outlook plugin	6.2.0.6
Document plugin	6.2.0.4
CTI plugin	6.2.0.3

Support is now included for Internet Explorer 8

### Patch C Issues List

Ref ID	Area	Patch Release Notes	Patch Release Status
0-80188-QA	.Net	A tab created using .NET was not working when context was switched from My CRM to Team CRM.	This issue is fixed.
0-77553-QA	.Net	An error occurred after clicking the Save button on a standard communication edit page that had been created by a custom dll.	This issue is fixed.
0-79555-QA	Campaign Management	When creating a group from response set ups, the group did not include leads or communications which had been linked to the wave activity using the 'one-by-one' technique.	This issue is fixed.
0-78645-QA	Cases	A newly created custom integer field in the cases entity contained a comma as the thousand separator, even though the Thousand Separator field was left blank.	This issue is fixed.
0-85085-QA	Cases	When closing a case, the Case Closed date and time field always showed that the case was closed at 12:00 regardless of what time the case was closed.	This issue is fixed.
0-79912-QA	Comms/Diary	An unexpected event occurred when an appointment was made outside the start/end time specified in the My Preference area.	This issue is fixed.
0-78274-QA	Comms/Diary	It was not possible to use calendar entries in a new window.	This issue is by design. Core documentation will be updated.
0-78338-QA	Comms/Diary	After creating a task and using the Regarding field to associate the task to a particular opportunity or case, the arrow to clear the regarding field was missing.	This issue is fixed.
0-79006-QA	Companies / People	When data from a text field containing more than 255 characters was exported to CSV, it was truncated after the first 255 characters.	This issue is due to a limitation in Excel, which has a limit of 255 characters per cell.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-58641-QA	Companies / People	After finding a company in CRM, clicking the Change button but then saving and exiting without making changes displayed a blank screen.	This issue could not be reproduced.
0-82011-QA	Companies / People	A user with limited security settings was not able to add addresses to a company; the New Address action button was not available.	This issue is by design. If a user has got rights to edit a company, they will not have access to edit Address or Phone/E-mail information for that company.
0-74141-QA	Companies / People	It was not possible to add the pers_departmentcode field to the Person Entry Screen.	This issue is fixed.
0-74367-QA	Component Management	A recorded component did not work as expected.	This issue is fixed.
0-78462-QA	Core Product	Area and country code were displayed in contact information even though area code was turned off.	This issue is by design. If country code and area code are set to No in CRM, any values in those fields are still synced from Outlook to CRM so that the next time a sync from CRM to Outlook occurs, the values remain the same in Outlook. See related case 0-76418-QA.
0-74022-QA	CTI	CTI buttons were not translated in the German version.	This issue is fixed.
0-78964-QA	Customization	Negative integers with decimal places did not work for chart objects.	This issue is fixed.
0-78529-QA	Customization	There was a discrepancy regarding different values being returned when using eWare.FindRecord and eWareQuery.	This issue is by design. The data returned is different because findrecord is using the dispatch connection so it's in the same transaction as the update itself (it will see the uncommitted data), whereas the QueryObj creates a new connection so it's not in the transaction and it will only see what is actually in the database; the commit doesn't happen till after the table level scripts are run.
0-78771-QA	Customization	The content of a newly created screen in the Person entity disappeared after the Continue button was clicked.	This issue is fixed.
17-34214	Customization	The context of the last company accessed was being retained on the new Company screen.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-58570-QA	Customization	An error occurred when attempting to customize the Notes entry screen in Inline Translation mode.	This issue is fixed.
0-83122-QA	Customization	An error occurred after changing the width of the Log On field to more than 20 characters.	This issue is fixed.
0-72816-QA	Customization	An error occurred when trying to delete a note from a newly created custom entity.	This issue is fixed.
0-73100-QA	Customization	An e-mail saved within workflow lost the server name reference in the HTML code and was unable to link to CRM.	This issue is fixed.
0-73130-QA	Customization	Validate script was not working correctly in edit mode for cases.	This issue is fixed.
0-81228-QA	Customization	An SQL error occurred when running a newly created screen on the Quotes entity.	This issue is fixed.
0-83454-QA	Customization	Inline customization was showing the wrong field names.	This issue is fixed.
0-73378-QA	Customization	After adding Selectsql to a list, the list was truncated after the first 10 records.	This issue is fixed.
0-86289-QA	Customization	An error occurred after adding a new tab of type runblock to run a block such as QuotesList or OpportunityList.	This issue is fixed.
0-76587-QA	Customization	An error occurred after running a find on a custom entity created using the Advanced Customization Wizard that included fields from related entities.	This issue could not be reproduced.
0-77952-QA	Customization	Navigation buttons on a newly created ASP page with two or more list blocks did not work as expected.	This issue has a workaround that is documented here <a href="http://sagecrmtraining.blogspot.com/2007/05/displaying-multiple-list-blocks-using.html">http://sagecrmtraining.blogspot.com/2007/05/displaying-multiple-list-blocks-using.html</a> .
0-79918-QA	Dashboard	A user with a number of saved searches with results in the dashboard was returning a value of 0 when creating a saved search summary.	This issue is fixed.
0-76425-QA	Dashboard	An error was returned when attempting to access a saved search on the dashboard.	This issue is fixed.
17-79679-QA	Data Upload	The Match User Fields drop-down list was appearing when it shouldn't.	This issue is fixed.
0-79488-QA	Data Upload	The incorrect territory was assigned to an uploaded lead record.	This issue is fixed.
0-81568-QA	Data Upload	A set of Leads records was uploaded to a specific user, but the user was not assigned the leads correctly when they logged on.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-74072-QA	Data Upload	Dedupe rules were not being reproduced when performing a new data upload with existing mappings.	This issue is fixed.
0-70688-QA	Document Plugin	Address data was not displayed after creating a "form letter" from the list of search results for sales opportunities.	This issue is fixed.
0-74441-QA	Document Plugin	When uploading or attaching files, filenames were saved in lowercase letters only.	This is by design.
0-77066-QA	Document Plugin	An error occurred when attempting to add an Excel spreadsheet containing Japanese Kanji characters to CRM via document drop.	This issue could not be reproduced.
0-86516-QA	Document Plugin	An error occurred after clicking Send Order to perform a mail merge.	This issue is fixed.
255-74142-QA	Documentation	The Crystal Reports readme file referenced an invalid subreport example.	This issue is fixed.
0-66400-QA	E-mail Client	E-mails were being filed against the wrong Person/Company.	This issue is fixed.
0-73984-QA	E-mail Client	The 'Comm_ChannelId' field was not populated when sending an e-mail.	This issue is fixed.
0-77423-QA	E-mail Client	The body of an e-mail sent to a non-CRM contact was lost.	This issue is fixed.
0-72500-QA	E-mail Client	Two e-mails were sent when a company had a comma in its name, e.g. when the company names is "Grifols, SA", one e-mail was sent to "Grifols" and another sent to "SA".	This issue is fixed.
0-82315-QA	E-mail Manager	E-mail attachments were not included when they had French characters in their filename.	This issue is fixed.
0-66417-QA	E-mail Manager	A workaround for creating e-mail templates locked to specific entities did not work for custom entities.	This issue is fixed.
17-68956-QA	Exchange	There was a problem running the control panel utility when the password was case sensitive.	This issue could not be reproduced.
0-84440-QA	Exchange	An error occurred when creating or deleting an appointment.	This issue is fixed.
0-74373-QA	Groups / Target Lists	An SQL error occurred when creating a group.	This issue is fixed.
0-76610-QA	Groups / Target Lists	Some images that were sent as attachments in a mass e-mail were lost.	This issue could not be reproduced.
416-78212-QA	Groups / Target Lists	An error occurred when editing a group.	This issue is fixed.
0-78088-QA	Groups / Target Lists	Users could not filter by Case after creating a case group via Advanced Find.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
372-53153-QA	Install / Upgrade	Errors occurred during the French Upgrade from version 6.0 to version 6.1.	This issue is fixed.
0-72253-QA	Integration	An SQL error occurred in real-time data views when Inline Translation mode was turned on.	This issue is fixed.
0-79317-QA	Integration	Account intforeignid fields need to be at least 50 characters in length, but whenever an integration was activated by CRM, they were being set to a length of 20.	The issue is fixed.
0-75281-QA	Integration	A user could see an account and navigate to it via the find screen, even though they were not assigned to the account's territory.	This issue is fixed.
0-64835-QA	Integration	Account context was lost when linking a quote or order to the ERP system.	This issue could not be reproduced.
0-64852-QA	Integration	An error occurred when attempting to synchronize data from ERP to CRM.	This issue could not be reproduced.
0-65230-QA	Integration	An error occurred when the field NoDiscAmt was set to no value.	This issue is closed. The field is no longer used.
0-72253-QA	Integration	An SQL error occurred in RTDV when inline translation mode was switched on.	This issue is fixed.
0-82577-QA	Integration	There were performance-related problems when a large number of Table Level Scripts were queued.	This issue is fixed.
0-79099-QA	Integration	An error occurred when creating a web quote for an account.	This issue is fixed.
0-80483-QA	Key Attribute Data	The key attribute list disappeared when key attribute category was added to a custom tab and inline translation mode was turned on.	This issue is fixed.
0-81556-QA	Key Attribute Data	An enabled check box for a Key Attribute field was being saved as 'On' and not 'Y' by the dll, which lead to a report not retrieving records with a Key Attributes field marked as checked.	This issue is fixed.
0-45478-QA	Key Attribute Data	It was not possible to add more than one response to a campaign.	This issue could not be reproduced and has been closed as resolved.
0-81706-QA	Leads	An error occurred when uploading a lead with a numeric field on a hosted install.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-80292-QA	Leads	When a user created a new Lead in CRM, the wave Activity field did not default to any value until the user selected it from the field (lead_waveitemid - Search Select Advanced).	This issue is fixed.
0-77991-QA	Leads	An error occurred when trying to add or find a Person from a Lead.	This issue is fixed.
0-72989-QA	Library and Templates	An error occurred after opening an attachment on the Communication tab and then clicking on the Merge workflow rule.	This issue could not be reproduced.
0-73001-QA	Library and Templates	When opening an attachment on an Opportunity's communication tab to view a previously merged doc, and then try to run a mail merge from the opportunity summary screen, the default global template that was there before was gone.	This issue could not be reproduced.
0-77219-QA	Library and Templates	After deleting a document from an opportunity, the context changed to a company with a company name link, which when clicked threw an error saying that the record no longer existed.	This issue is fixed.
0-74581-QA	Link And Sync	Synchronization of an account failed after requesting something to be deleted that does not exist in CRM.	This issue is fixed.
0-78422-QA	Mass Update	Mass Update did not work for a date in an Opportunity.	This issue could not be reproduced.
426-73855-QA	Mobile	The dll was not behaving as expected for certain user types.	This issue is fixed.
0-75300-QA	Notification	E-mail notification did not work after creating a new Opportunity.	This issue is fixed.
0-79285-QA	Opportunities	A blank Opportunity history form displayed instead of the Opportunity summary screen when a manager clicked on the hyperlink of a subordinate's Opportunity.	This issue is fixed. The Opportunity Summary screen is now displayed when the Opportunities of a subordinate are viewed by a manager.
0-73468-QA	Opportunities	The Currency field was not defaulting to 0.00 when the existing value was deleted.	This issue is fixed.
435-78691-QA	Opportunities	An error occurred when searching for an Opportunity via the Find menu.	This issue could not be reproduced.
0-78290-QA	Outlook Integration	An error occurred after opening a ticket summary report in Sage CRM via Outlook.	This issue could not be reproduced.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-82189-QA	Outlook Integration	Companies with an ampersand (&) in their name had their name truncated after the ampersand when they were added to Outlook contacts.	This issue is fixed.
0-87173-QA	Outlook Integration	Following an upgrade from 6.1k to 6.2SP1, tasks and appointments dating back to 2008 were synced back to CRM with no person or company attached.	This issue is fixed.
0-82996-QA	Outlook Integration	There was a problem syncing to Outlook after upgrading to version 6.2.	This issue is fixed.
0-83267-QA	Outlook Integration	The Organizer and Created By fields in an appointment were switching to the wrong user after syncing with Outlook.	This issue is fixed.
372-89604-QA	Outlook Integration	Outlook port was connecting to port 80 instead of 443.	This issue is fixed.
0-73007-QA	Outlook Integration	A blank appointment created in CRM was not displayed in Outlook after a sync.	This issue is by design. CRM items with empty details and Outlook items with no subject and body are not synced. These items have been added to the Skipped Items log.
372-83803-QA	Outlook Integration	It was not possible to run reports from the Reports main menu folder in Outlook.	This issue is fixed.
0-76418-QA	Outlook Integration	Area and country code was displayed in contact information even though area code was turned off.	This issue is by design. See related case 0-78462-QA.
0-76925-QA	Outlook Integration	When replying to an e-mail, the communication record was disassociated from the related case.	This issue is fixed.
0-84637-QA	Outlook Integration	An error occurred in the Comm_MeetingID column due to the field length being 140 characters long and Outlook integration creating an ID of 150 characters.	This issue is fixed.
0-83946-QA	Outlook Integration	When synchronizing tasks and appointments from Sage CRM to Outlook, all French extended characters were removed.	This issue is fixed.
0-85486-QA	Outlook Integration	Cell phone numbers were not being synchronized from Outlook to CRM.	This issue is fixed.
0-86990-QA	Outlook Integration	Some CRM buttons were not available in Outlook after installing the Outlook plugin.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-78952-QA	Quotes / Orders	It was not possible to enable workflow for Orders and Quotes.	This issue is by design. The option to enable workflow for Quotes and Orders has been removed from Administration   Advanced Customization   Workflow & Escalation.
0-79855-QA	Quotes / Orders	A newly created text field that had been made a required field was not being validated properly.	This issue is fixed.
0-72507-QA	Quotes / Orders	A mail merge Quote did not save in the Documents tab.	This issue is fixed.
0-72468-QA	Quotes / Orders	The orde_Tax field was not displayed on the order screen in CRM.	This issue is by design. Hardcoded fields on this screen are orde_discounttype, orde_liteitemdisc, orde_netamt, orde_discountpc, orde_discountamt, orde_tax, and orde_grossamt. The orde_tax field is only showed when integration is installed.
0-78249-QA	Quotes / Orders	An error occurred when using the SetContext method with quotes and orders on a custom ASP page.	This issue is fixed.
0-77765-QA	Related Entities	The companyorgchart function was not working as expected.	This issue is by design and can be worked around by using the relatedcompanieslist functionality. The relatedcompanieslist uses the same data tables as companyorgchart (relationships created through relatedcompanieslist are visible on the companyorgchart screen), and relatedcompanieslist presents almost the same information.
0-80115-QA	Reports	When reports were set to List and graphs to HBar, the legend was limited to only 20 records, regardless of how many records were present.	This issue is fixed.
0-71867-QA	Reports	Some axis values were not appearing correctly in a chart.	This issue is fixed.
0-73094-QA	Reports	Blank cells in an Excel file created by opening a CRM report in XLS format were not really blank.	This issue is fixed.
416-73456-QA	Reports	An error occurred when entering date criteria in a report based on a custom view that ties in a composite date field.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
416-73593-QA	Reports	When creating a bar chart with several bars, the last bar color was not consistent with the color in the legend.	This issue could not be reproduced.
416-73602-QA	Reports	Chart labels that don't fit on the report output disappeared, making reports difficult to read.	This is by design. The problem is due to a limitation in the third-party library used for rendering charts. It has been flagged for review in future versions.
0-82966-QA	Sales Forecasting	internal - not for release notes	
0-79738-QA	Security Management	An error occurred when adding a new contact.	This issue is fixed.
0-87550-QA	Security Management	There were some Cross-Site Scripting vulnerabilities in Sage CRM that allowed users to inject arbitrary Javascript into standard CRM pages.	This issue is fixed.
0-80384-QA	Solo	The totals for Quotes or Orders containing figures with decimal points were showing as 0 when synced to the Solo client.	This issue is fixed.
0-78193-QA	Solo	Companies with umlauts in their name were not displayed correctly when synced to the Solo client.	This issue is fixed.
0-73209-QA	Solo	An error occurred when sending an e-mail via a Workflow action on Solo.	This issue is fixed.
463-90104	Solo	No Contacts were being synced to Solo.	This issue is by design. The snapshot needs to be recreated after the Solo Server is installed and before the Solo client is installed.
0-80426-QA	User Interface	The message "The field is already matched. Do you want clear the results?" was not appearing when a user was trying to change the value in a Search Select Advanced field.	This issue is fixed. The warning message now appears.
0-80456-QA	User Management	It was not possible to create a new user as a resource when the active number of users was at the level of the maximum number of licenses.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-38208-QA	Web Services	After adding a new text field to the line items table and attempting to add a new record via the web services add() method, the record was added, but the new field was not populated even though it was included in the request XML.	<p>This issue is fixed. Web services has now been changed to allow the updating of all fields for order and quote items. Now, unless certain fields are included with the different line item types, the web service will throw an exception. They are as follows:</p> <ol style="list-style-type: none"> <li>When inserting a new standard line item: <ul style="list-style-type: none"> <li>orderquoteid</li> <li>opportunityid</li> <li>lineitemtype (either 'i', 'f' or 'c')</li> <li>productid</li> <li>uomid</li> <li>quantity</li> <li>quotedprice</li> </ul> </li> <li>When inserting a new free text line item: <ul style="list-style-type: none"> <li>orderquoteid</li> <li>opportunityid</li> <li>lineitemtype (either 'i', 'f' or 'c')</li> <li>description</li> <li>quantity</li> <li>quotedprice</li> </ul> </li> <li>When inserting a new comment line item: <ul style="list-style-type: none"> <li>orderquoteid</li> <li>opportunityid</li> <li>lineitemtype (either 'i', 'f' or 'c')</li> <li>description</li> </ul> </li> </ol> <p>When updating an existing line item, if a certain field exists in the update, it has to have a value. Those values are as follows:</p>

Ref ID	Area	Patch Release Notes	Patch Release Status
			<p>1. When updating a standard line item: standard line item:</p> <ul style="list-style-type: none"> <li>• quantity</li> <li>• quotedprice</li> <li>• uomid</li> </ul> <p>2. When updating a free text line item:</p> <ul style="list-style-type: none"> <li>• description</li> <li>• quantity</li> </ul> <p>3. When updating a comment line item:</p> <ul style="list-style-type: none"> <li>• description</li> </ul> <p>Note: The following two fields are not updateable, and will throw an exception:</p> <ul style="list-style-type: none"> <li>• linetype</li> <li>• orderquoteid</li> </ul> <p>Also, certain fields are calculated/overridden in the web service code, so the values that the user passes into them will be ignored. Those fields are:</p> <ul style="list-style-type: none"> <li>• quotedpricetotal</li> <li>• listprice</li> <li>• discount</li> <li>• discountsum</li> </ul>
<b>0-43638-QA</b>	Web Services	It was not possible to add a new record with the same description as an existing product already in CRM using the web service.	This issue is by design. The product is deduped by name in web services. If it is found it is updated, if not it is inserted.
<b>0-63330-QA</b>	Web Services	An error occurred when attempting to add a new order item using web services.	The issue is fixed. Please refer to case 0-38208-QA for information on the changes that have been made to web services.
<b>0-72451-QA</b>	Workflow	Clicking the Cancel button when performing a mail merge did not cancel the mail merge action.	This issue is fixed.
<b>0-80139-QA</b>	Workflow	A record created with the .NET API DataPageNew class did not get attached to workflow.	This issue is fixed.

Ref ID	Area	Patch Release Notes	Patch Release Status
0-59695-QA	Workflow	When two separate users were viewing a workflow, and one of them progressed a case to the next stage, there was no validation check when the second user tried to progress the workflow.	This issue is fixed.
0-74042-QA	Workflow	Cases were assigned a duplicate ID in the Opportunity workflow.	This issue is fixed.
0-76327-QA	Workflow	An Update Column workflow action did not work as expected.	This issue is fixed.
0-85009-QA	Workflow	Some information was lost when creating a case from an incoming e-mail.	This issue is fixed.
416-74553-QA	Workflow	An escalation e-mail was not sent.	This issue could not be reproduced.
0-74639-QA	Workflow	An error occurred after clicking on an onscreen notification opportunity link.	This issue is fixed.
0-78262-QA	Workflow	A cloned workflow rule lost e-mail information.	This issue is fixed.
0-73329-QA		The translation for the secondary entity "Lead Progress" was the same as "Case Progress".	This issue is fixed.
0-84119-QA		On a hosted French install, dollar symbols (\$) were displayed instead of the euro symbol (€).	This issue is fixed.

## Rolled Up Fixes

The following 6.1m and 6.0x case fixes have been rolled up to this patch. Please refer to the 6.0 and 6.1 Patch Release Notes for more information.

### Patch 6.1m

Ref ID	Area
0-82624-QA	3rd Party Software
0-84188-QA	Accounts
0-86564-QA	Comms/Diary
0-80625-QA	Companies / People
0-80760-QA	Customization
0-83198-QA	Customization
0-83616-QA	Customization Wizard
0-83499-QA	Database
0-77715-QA	Document Plugin
0-78094-QA	Document Plugin
0-78864-QA	Document Plugin
0-81078-QA	E-mail Client
0-81732-QA	E-mail Client
0-63934-QA	E-mail Manager
0-77641-QA	Groups / Target Lists
0-79273-QA	Groups / Target Lists
0-79299-QA	Groups / Target Lists
0-80607-QA	Groups / Target Lists
0-85260-QA	Groups / Target Lists
0-78230-QA	Groups / Target Lists
0-76702-QA	Integration
0-68613-QA	Integration
0-78181-QA	Integration
0-72860-QA	Integration
0-69699-QA	Integration
0-79056-QA	Keyword Search
0-78504-QA	Opportunities
0-78572-QA	Opportunities
0-83788-QA	Order Entry / Products
0-78566-QA	Outlook Integration
0-79153-QA	Outlook Integration
0-85667-QA	Reports
0-65788-QA	Self Service
0-80644-QA	Solo
0-81909-QA	Solo
0-82926-QA	Web Services
0-67832-QA	Workflow
0-79335-QA	Workflow

**Patch 6.0x**

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

## Patch B

**Released** April 2009

<b>Files included</b>	DLL version	6.2.0.4
	Outlook plugin,	6.2.0.4
	Document plugin	6.2.0.3
	CTI plugin	6.2.0.2

Patch 6.2 B was released in April 2009 as 6.2 SP1. For more information, please refer to the Sage CRM 6.2 SP1 Release Notes.

## Patch A

**Released:** January 2009

**Files Included:** DLL version 6.2.0.3, Outlook plugin 6.2.0.2, CTI plugin 6.2.0.1, ewarepluginx 6.2.0.2

**Issues Addressed:** This patch addresses a number of localization and internationalization issues.

Patch A Issues List

The following issues are addressed in Patch A:

### German-specific issues:

#### German characters in username

A user with German characters in their username could not run a summary report. The issue is now fixed. (Case ID 261-70628)

#### New entity with German characters

It was not possible to add a new entity with German characters on a German install. The issue is now fixed. (Case ID 434-73366)

#### Component manager

It was not possible to create a new instance of component manager on a German install. The issue is now fixed. (Case ID 415-73760)

#### Extended characters in RTDVs

Extended characters were not being reproduced properly in RTDVs. The issue could not be reproduced. (Case ID 332-73802)

#### German characters on Solo

A German character was incorrectly lower cased on a new field synced to the Solo client. The issue is now fixed. (Case ID 261-74546)

#### Document library

An error occurred when attempting to save a document to the document library on a German install. The issue is now fixed. (Case ID 261-76449)

### **Groups tab on Solo**

The Groups tab was not available offline on a German install. The issue is now fixed. (Case ID 261-76553)

### **Reset standard Dashboard button**

The Reset standard Dashboard button was not available on the Company dashboard on a German install. The issue is now fixed. (Case ID 328-72452)

### **Localized names of report categories on mobile**

The localized names of report categories were not displayed correctly in the Select Category dropdown list in the Report context on a German mobile install. The issue is now fixed. (Case ID 328-72521)

### **Runblock – extended characters**

Extended characters were not displayed correctly when attempting to display a newly created entry block on a German install. This issue is by design. (Case ID 261-73665)

### **Export to File – German**

An error occurred when attempting to open a text file containing extended characters that had been exported from a German install. The issue is now fixed. (Case ID 319-73779)

### **Exported records – German**

Records exported to file from a German install were being saved in the Communications tab without the expected file attachments. The issue is now fixed. (Case ID 319-73798)

### **Integration screens**

Integration screens were not fully translated when creating a new integration on a German install. The issue is now fixed. (Case ID 332-73801)

### **Outbound Lead Generation**

The text “Outbound Lead Generation” was not translated into German in the Category Group dropdown list in a newly created Wave activity on a German install. This is demo text and will not be translated. (Case ID 415-73884)

### **New components – extended characters**

Extended characters were not displaying correctly when installing a new component on a German install. The issue is now fixed. (Case ID 415-73898)

## **Solo**

Solo did not install at the first attempt on a German install. The issue is now fixed. (Case ID 261-74092)

## **Outlook options fields**

Not all Outlook options fields (Extras | CRM | Optionen) were visible on a German install. The issue is now fixed. (Case ID 410-74098)

## **Upload document with extended characters**

It was not possible to upload a document with extended characters on a German install. The issue is now fixed. (Case ID 415-74135)

## **German characters on Solo**

A newly created field containing German characters caused an error on Solo unless the snapshot was re-created. The issue is now fixed. (Case ID 261-74606)

## **Crystal reports**

Crystal reports would not open on a German install. The issue can be fixed by installing Crystal Report Viewer, enabling session state and restarting IIS. (Case ID 415-75030)

## **Recurring appointments**

It was not possible to change recurring appointment details on a German install. The issue is now fixed. (Case ID 332-75990)

## **Main menu icons**

The wrong icons were displayed on the main menu on a German install. The issue is now fixed. (Case ID 261-76558)

## **Users list on Solo**

The Users list was not populated after a Solo sync on a German install. The issue is now fixed. (Case ID 0-66496-QA)

## **Translation for “Comp\_Territory”**

The wrong translation for “Comp\_Territory” was displayed on a German install. The issue is now fixed. (Case ID 0-68405-QA)

## **Extended characters in a Block Name**

Extended characters were corrupted in a Block Name on a German install. The issue is now fixed. (Case ID 261-73754)

### **Extended characters in the Conflicts window**

Extended characters were displayed incorrectly in the Conflicts window on a German install. The issue is now fixed. (Case ID 332-75924)

### **Customized views**

Customized views were not translated on a German install. The issue is now fixed. (Case ID 319-76438)

### **Other Actions**

Some system actions of type “Other” were not translated on Customized tabs on a German install. The issue is now fixed. (Case ID 328-71256)

### **Outlook CRM Options**

Some words were truncated on the Outlook CRM Options screen on a German install. The issue is now fixed. (Case ID 328-72298)

### **Unexpected conflict**

An unexpected conflict appeared after an Appointment that had been created in Outlook on a German install was updated. The issue is now fixed. (Case ID 332-76088)

### **Server Time Zone**

The Server Time Zone was set to GMT instead of GMT +1 on a German install. The issue is now fixed. (Case ID 261-76466)

### **Company dashboard**

The Company to Company Relationship and Related Companies to all Entities objects were not translated to German in the company dashboard on a German install. The issue is now fixed. (Case ID 328-72299)

### **JavaScript errors on screen**

JavaScript errors caused the screen to render erroneously after installing a German 6.2 build. The issue is now fixed. (Case ID 0-76158-QA)

### **Extended character ß**

There was a problem searching for companies containing the extended character ß within a group called “ß”. The character “ß” is treated as double “s” – “ss” within CRM due to ANSI standards. Therefore searching on “ß” or on “ss” will return the same results. If a Company group is created and called “ß”, the system will not allow another group called “ss” to be created. This is OK because those “ß” is treated as “ss” SQL ANSI-92 and ISO standards all

dictate that the “ß” evaluates to "ss". So this case passed as the functionality is working as expected. (Case ID 319-77396)

### **Unexpected conflict**

An unexpected conflict appeared after a Task that had been created in Outlook on a German install was updated. The issue is now fixed. (Case ID 332-75923)

### **Solo Client**

The Solo Client failed to install on a German install. The issue is now fixed. (Case ID 328-72179)

### **Company dashboard**

The “Related Companies to all Entities” function on the company dashboard was not working. The issue is now fixed. (Case ID 328-72179)

### **Quote Order Summary Tab**

The Quote Order Summary Tab was missing from a German install. The issue is now fixed. (Case ID 261-73964)

## Other issues:

### Escalation Send E-mail workflow action

The Escalation Send E-mail workflow action function was not working. The issue is now fixed. (Case ID 332-59620)

### No Sync button

There was no Sync button visible in Outlook after installing the Sage CRM Outlook plugin. The issue is now fixed. (Case ID 328-71240)

### Upgrade from 6.1 to 6.2

It was not possible to upgrade from CRM6.1 to CRM6.2 on a French install. The issue is now fixed. (Case ID 328-72508)

### 6.2 GA on Oracle 11g - Self Service

The CRM Self Service demo web site would not open on a 6.2 GA install on Oracle 11g. The issue is now fixed. (Case ID 410-73246)

### Document merge and merge Quotes/Orders

Errors occurred when attempting to do a document merge and trying to merge Quotes and Orders. The issue is now fixed. (Case ID 261-74009)

### 6.2 GA on Oracle 11g - Self Service

The CRM Self Service demo web site would not open on a 6.2 GA install on Oracle 11g. The issue is now fixed. (Case ID 410-74091)

### Solo

Additional data was not being synchronised to Solo. This issue is by design. (Case ID 261-74095)

### Syncing Appointments

A newly organized appointment that has been sent out and accepted by invitees could not be synched from Outlook to CRM. The issue is now fixed. (Case ID 353-42179)

### New e-mail on hosted

A JavaScript error occurred when sending a new e-mail on a hosted install. The issue is now fixed. (Case ID 261-60744)

**Timezone error**

The error "TimeZone not available" occurred when attempting to save user preferences on a French install on Windows Vista. The issue is now fixed. (Case ID 328-71241)

**E-mail attachments**

E-mail attachments were lost when there were extended characters were present in the object, description or attachment name. The issue is now fixed. (Case ID 328-71242)

**Sage CRM via Outlook**

A script error occurred when opening Sage CRM via Outlook. The issue is now fixed. (Case ID 328-71257)

**Duplicate custom tabs**

Several custom tabs were duplicated when data was synced across to the Solo client. The issue is now fixed (Case ID 210-71738)

**Enhanced e-mail editor - localization**

There were several localization issues with the enhanced e-mail editor. The issues are now fixed. (Case ID 328-72571)

**Opportunity territories**

A user with a sales rep profile in the Holland Territory assigned a newly created Opportunity to a user with a sales rep profile in the US East Territory, but the latter user could not view the Opportunity as expected. This issue is by design. (Case ID 0-71201-QA)

**Custom entity documents**

A document created in the context of a new custom entity did not populate the entity's associated fields. The issue is now fixed. (Case ID 0-71963-QA)

**Order list currency**

The Order list was displaying in the base currency rather than the currency of the ERP account. The issue is now fixed. (Case ID 0-72004-QA)

**OrderItems and QuoteItems column length**

A new Integration that extended the length of the OrderItems and QuoteItems columns did not work. The issue is now fixed. (Case ID 0-73184-QA)

**Opportunity**

It was not possible to save or amend an Opportunity Opened date. The issue is now fixed. (Case ID 410-73690)

**Duplicate reminders**

Newly created recurring appointments were generating duplicate reminders. The issue is now fixed. (Case ID 135-73768)

**Multi-server installs**

A number of issues were experienced when conducting multi-server installs. The issues are now fixed. (Case ID 0-73358-QA)

**Self Service web site**

A registry error message occurred when attempting to access the Self Service web site. The issue is now fixed. (Case ID 11-73823)

**Check box as GIF**

When a new check box field was added to a list and set to not display as a GIF, the values were not shown correctly. The issue is now fixed. (Case ID 28-73912)

**Solo account information**

Retrospective Account information was not being deleted from Solo when a new Centralized Solo Profile with no access to that data was created. The issue is now fixed. (Case ID 261-74114)

**.NET DLL from QuotesListBox**

It was not possible to link to the .NET DLL from the QuotesListBox. The issue is now fixed. (Case ID 261-74479)

**Totals in Order/Quote lines**

Total values that appeared under the list of Order/Quote lines were being calculated by CRM instead of the pricing service. The issue is now fixed. (Case ID 0-75336-QA)

**Timeout issue**

There was a timeout issue when installing CRM on Oracle 11g. The issue is now fixed. (Case ID 410-75963)

**Web services records**

It was not possible to add a record via web services. The issue is now fixed. (Case ID 261-76259)

**ProjectTopContent code**

The code `eWare.GetCustomEntityTopFrame()` did not display the contents of the ProjectTopContent box in the top content area as expected. The issue is now fixed. (Case ID 0-75513-QA)

**Field Level Security**

Field Level Security was not working on a field with extended characters. The issue is now fixed. (Case ID 135-78109)

**Territories**

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

**Appointment details**

The status, action and territory details attached to an appointment changed during synchronization. The issue is now fixed. (Case ID 332-76306)

**Task details**

The status, action and territory details attached to a task changed during synchronization. The issue is now fixed. (Case ID 332-76321)

**Appointments in CRM**

Appointments in CRM were getting deleted after synchronization. The issue is now fixed. (Case ID 410-76482)

**Synced tasks in Outlook**

When updating a synced task in OTL, the status reverted to Pending for the task in CRM. The issue is now fixed. (Case ID 410-76574)

**Extended characters in Outlook**

Extended characters on the Outlook toolbar and CRM menus were not displayed correctly after the Outlook plugin was installed. The issue is now fixed. (Case ID 328-76590)

**Synced tasks in Outlook**

When updating a synced task in OTL, the status reverted to Pending for the task in CRM. The issue is now fixed. (Case ID 410-76901)

**Individual appointments deleted from series**

When individual appointments that had been created as part of a series in CRM and synced to Outlook were deleted in Outlook, the corresponding CRM appointments were not deleted. The issue is now fixed. (Case ID 332-37429)

**Syncing appointments in Outlook**

The number of occurrences of appointments in Outlook and CRM disagreed after the invitees were updated and the applications were re-synchronized. The issue is now fixed. (Case ID 135-37521)

**Syncing appointments in Outlook**

The wrong appointment displayed in CRM when a recurring appointment was changed in Outlook and saved, and the applications were re-synchronized. The issue is now fixed. (Case ID 353-40504)

**Syncing appointments in Outlook**

An appointment modified in Outlook failed to sync to CRM after it had been changed. The issue is now fixed. (Case ID 353-40577)

**Syncing appointments in Outlook**

A recurring appointment disappeared from Outlook when its End Time was changed in CRM and the applications were re-synchronized. The issue is now fixed. (Case ID 353-40616)

**RunscriptsP.exe**

The RunscriptsP.exe tool experienced a problem trying to connect to certain types of databases. The issue is now fixed. (Case ID 309-43966-QA)

**Library items for deleted Person**

An error occurred after deleting the primary Person for a Company and then later on trying to delete any library items associated with them. The issue is now fixed. (Case ID 0-44167-QA)

**Syncing appointments in Outlook**

A recurring appointment would not sync to Outlook even after a sync info reset. The issue is now fixed. (Case ID 332-45079)

**Conflicts**

Inconsistent results were experienced when Conflicts were set to CRM Updates Win for both individual and recurring appointments. The issue is now fixed. (Case ID 332-46324)

### **Workflow tasks being overwritten**

A new task was created in the case workflow, but another task was overwritten with the same details. The reason for this is as follows: As a result of the Outlook Integration deduplication rules, a problem can occur when multiple tasks with similar details are created in CRM and are synced to Outlook. The problem is that a task can be updated in CRM with details from a different task or a task can disappear from CRM when a similar one is deleted in Outlook. This situation will probably only ever arise when tasks are created automatically from Workflow. A scenario may occur where a number of tasks with the same details are generated in a workflow depending on the workflow rules. The solution is to include a default unique field in the task Details field box of the 'Create Task' workflow action.. (Case ID 0-47100-QA)

### **Person Match notification**

A Possible Person Match notification appeared on the Lead Contact Details panel even though no Person existed with the same first or last Name. The issue is now fixed. (Case ID 0-51104-QA)

### **Product code with leading zeros**

The zeros were dropped from a product code with leading zeros when using mail merge with the Panopoly Quote template. The issue is now fixed. (Case ID 0-58645-QA)

### **New e-mail JavaScript error**

A JavaScript error occurred when attempting to create a new e-mail. The issue is now fixed. (Case ID 0-52310-QA)

### **Filing e-mail with Japanese characters**

An error occurred when attempting to file an e-mail containing Japanese characters from Outlook. The issue is now fixed. (Case ID 0-60716-QA)

### **Custom pages**

An error occurred on a custom page containing a session variable that contains a SQL WHERE clause. The issue is now fixed. (Case ID 0-63748-QA)

### **New E-mail button**

The New E-mail button on the My CRM | Calendar page contained unexpected characters after an extended character was added to the hotkey. The issue is now fixed. (Case ID 328-64940)

### **Runblock action to create a table**

An error occurred when trying to create a new table called KPI using the Runblock action. This issue is by design. To use Runblock to add a list block to the Users tab group, it has to be a list based on the Users table. (Case ID 0-65086-QA)

**Entity name with extended characters**

It was not possible to create a new entity with extended characters. The issue is now fixed. (Case ID 415-77626)

**Notification e-mails**

Notification e-mails were not being sent. The issue is now fixed. (Case ID 332-78236)

**Tracking e-mails**

Tracking e-mails would not send when using e-mail manager and MAPI. The issue is now fixed. (Case ID 332-78250)

**CID fields**

After creating a group that displayed a currency field, the corresponding CID field unexpectedly appeared in the group. The issue is now fixed. (Case ID 0-65372-QA)

**Check boxes created with the Runblock action**

Check boxes created with the Runblock action on the personsummaryblock and companysummaryblock appeared inconsistently. The issue is now fixed. (Case ID 0-65543-QA)

**OnCreate method**

The OnCreate method did not work on a Person Search screen. The issue is now fixed. (Case ID 0-66445-QA)

**Security criteria on advanced search**

Specified security criteria were not properly applied when using an Advanced Search. The issue is now fixed. (Case ID 0-66823-QA)

**Personal Phone Details and Personal E-mail Details**

The Personal Phone Details and Personal E-mail Details panels were not automatically populated when converting a Lead. The issue is now fixed. (Case ID 0-67059-QA)

**Progress notes**

Progress notes were not being added to a custom entity. The issue is now fixed. (Case ID 0-67166-QA)

**External Logon Allowed**

External users were allowed to log in even though the External Logon Allowed setting of the admin user was set to False. The issue is by design. Documentation will be made more specific around this area. (Case ID 0-67671-QA)

**Multi Select Field**

After creating a new Multi Select Field for Lead and Company, adding it to the WebToLeadPage, then creating a new Lead from HTML code, the data contained in both fields was not the same. The issue is now fixed. (Case ID 0-67711-QA)

**Company Territory data**

It was not possible to overwrite company Territory data by re-uploading. The issue is now fixed. (Case ID 0-67844-QA)

**Person records in Opportunity**

When creating a new Person from the Person List displayed in an Opportunity, the Person record was not automatically associated with the Company. The issue is now fixed. (Case ID 0-68318-QA)

**Lead search screen**

An unexpected event occurred attempting to open any lead from the Lead search screen or from the Recent List on a hosted install. The issue is now fixed. (Case ID 0-68535-QA)

**Conditional rules**

Conditional rules applied when creating a workflow for the Person entity were not being correctly applied. The issue is now fixed. (Case ID 0-68445-QA)

**Mass update on Opportunity search results**

An error occurred when performing a mass update on Opportunity search results. The issue is now fixed. (Case ID 0-68634-QA)

**Reports error**

An error occurred when running a PDF report. The issue is now fixed. (Case ID 0-68776-QA)

**Numeric fields**

An error occurred when trying to create a numeric field in the Lead context. The issue is now fixed. (Case ID 0-68648-QA)

**Back button**

The Back button was returning users to unexpected screens. The issue is now fixed. (Case ID 0-69200-QA)

**Custom entity search**

It was not possible to incorporate fields from other tables when doing a search on a custom entity. This issue is by design. (Case ID 255-69542-QA)

### **Team and User information on Solo**

All Team and User information was lost after changing the User language and synchronizing to Solo. The issue is now fixed. (Case ID 0-69485-QA)

### **Self Service dates and times**

The created date and time for cases in web Self Service pages differed by 1 hour when viewed in CRM. This is by design. Self Service dates and times match CRM only when the server timezone matches the timezone for the user logged in to CRM. (Case ID 0-70229-QA)

### **Extended characters on E-mail Manager**

An error occurred when trying to use E-mail Manager with a username containing extended characters. The issue is now fixed. (Case ID 328-71208)

### **Address Linked and Default Address check boxes**

The Address Linked and Default Address check boxes had the same properties, which blocked automation. The issue is now fixed. (Case ID 404-71216)

### **Pipeline**

The Pipeline did not display if it contained a stage with an extended character in its name. The issue is now fixed. (Case ID 328-71215)

### **Extended characters on customized screen**

Extended characters were not displayed correctly on a new customized screen created using the RunBlock action. The issue is now fixed. (Case ID 328-71243)

### **Duplicated prefixes**

Prefixes were duplicated when fieldnames including a prefix were sent in web methodcall getConfiguration. The issue is now fixed. (Case ID 0-70652-QA)

### **Selection values**

Selection values were converted to date values when exporting a file to CSV format. The issue is now fixed. (Case ID 0-69608-QA)

### **Key attribute and Group-by field**

Key attribute and Group-by field caused a SQL error when attempting to run a report. The issue is now fixed. (Case ID 0-70328-QA)

### **Address as a Search Select Advanced field**

It was not possible to use an Address as a Search Select Advanced field. The issue is now fixed. (Case ID 0-71861-QA)

**File E-mail screen**

Company and Person Name were not displayed in the File E-mail screen as expected. The issue is now fixed. (Case ID 328-72260)

**Document template with a "+" char in the title**

It was not possible to edit or change a document template with a "+" char in the title. The issue is now fixed. (Case ID 328-72590)

**Filing e-mail for a custom entity**

When filing e-mail for a custom entity, the mail was correctly filed and a communication record created, but the document did not appear in the Documents tab. The issue is now fixed. (Case ID 0-72873-QA)

**Filing e-mail for a custom entity**

When filing e-mail for a custom entity, the mail was correctly filed and a communication record created, but the document did not appear in the Documents tab. The issue is now fixed. (Case ID 416-72959-QA)

**E-mail from a Lead**

An error occurred when sending e-mail from a Lead. The issue is now fixed. (Case ID 434-73310)

**RunOrdersList**

An error occurred when invoking the custom method:RunOrdersList. The issue is now fixed. (Case ID 0-70383-QA)

**Account entity**

The Account entity no longer displayed in the New menu after a new entity was created. The issue is now fixed. (Case ID 261-73897)

**ERP selections**

No ERP selections worked after creating a new integration. The issue is now fixed. (Case ID 0-71040-QA)

**Extending the installer**

Extending the installer worked only when installing a new version of the product and did not apply changes when upgrading from a previous version. The issue is now fixed. (Case ID 0-74803)

**Advanced find/update**

Advanced find/update exhibited different behavior than expected. The issue is now fixed. (Case ID 319-75931)

**Inline image**

An inline image was not displayed on an e-mail viewed from the Communications tab. The issue is now fixed. (Case ID 434-76091)

**Survey banner**

The Survey banner reappeared after being dismissed when viewing CRM via Outlook. The issue is now fixed. (Case ID 410-76445)

**Recurrence settings**

Removing the recurrence settings from an Appointment also removed additional Appointment details. The issue is now fixed. (Case ID 332-39796)

**Recurring appointments**

An error occurred when saving a recurring appointment. The issue is now fixed. (Case ID 332-45044)

**Synced recurring Appointments**

Question marks appeared instead of 3 recurring appointments that had been created in CRM, synced to Outlook, edited, and then re-synced to CRM. The issue is now fixed. (Case ID 410-76875)

**Text in Inline Translation mode**

Normal text was replaced by HTML code when logged in as an admin user with Inline Translation activated. The issue is now fixed. (Case ID 0-46289-QA)

**Task creation error**

An error occurred when attempting to create a task in CRM. The issue is now fixed. (Case ID 410-74113)

**Territories**

It was not possible to rename a newly created Territory. The issue is now fixed. (Case ID 332-77999)