



# Sage CRM

## 7.0 Release Notes

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## **Introduction**

These release notes are for Sage OpCos, Sage CRM partners, and Sage CRM customers.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, regional products may use different brand names.

## **Date of Release**

March 2010

## **Version Numbers**

Release Version: 7.0

DLL Version: 7.0.0.1

## Documentation

The following documentation is available with this release:

Description	Version Code
Release Notes	SYS-REA-ENG-700-1.0
What's New Guide	SYS-REL-ENG-700-1.0
Quick Start Guide	USE-QSG-ENG-700-1.0
User Guide	USE-MAN-ENG-700-1.0
System Administrator Guide	SYS-MAN-ENG-700-1.0
Developer Guide	DEV-MAN-ENG-700-1.0
Solo Guide	IMP-SOG-ENG-700-1.0
Self Service Guide	IMP-SEL-ENG-700-1.0
Wireless Guide	IMP-WMG-ENG-700-1.0
Upgrade Guide	IMP-UPG-ENG-700-1.0
User Help <i>In-product help available from the Help button in the Main Menu area</i>	USE-HLP-ENG-700-1.0
System Administrator Help <i>In-product help available from the Help button in the Administration area</i>	SYS-HLP-ENG-700-1.0
Developer Help <i>Available on the Sage CRM Ecosystem web site (<a href="http://www.sagecrm.com">http://www.sagecrm.com</a>)</i>	DEV-HLP-ENG-700-1.0

Further supporting documentation is available on the Sage CRM Ecosystem web site (<http://www.sagecrm.com>).

## Known Issues

The following known issues exist with Sage CRM version 7.0.

Ref ID	Area	Description	Status
0-95344-QA	.Net	If 6.2 and 7.0 are installed together on Staging or Development servers, .NET assemblies for 6.2 will stop working when 7.0 is installed.	Known issue. Workaround: If you want to switch from one to another, unregister one assembly and register the other. There is a .BAT file available from Support.
410-107360	Comms/Diary	Hover details for an appointment created for a company and person display company details only.	Known issue. Workaround is to open the communication to see the person details.
106-108239	Component Management	System flags not being scripted in recorded components.	Known issue. Workaround is to manually add the flag.
434-108147	Core Product	User unable to view full content of pop-out menu items with Windows 7 Professional client.	Known issue. Workaround is to use the tabs and context drop-down in the Main Menu area, and the "home pages" in the Administration area.
328-108667	CTI	CTI call screen defaults to "Account Summary" on standalone CRM systems.	Known issue. Workaround is to make sure you do not select this on a standalone CRM system.
434-103672	Data Upload	Under Windows 2008, an error occurs when carrying out a Data Upload using an MS Excel source file.	Known Issue. Current workaround is to import using CSV format.
319-108824	Demo Data	Demo data record dates are not correct on Oracle installs.	Known issue. Workaround is to use SQL to demonstrate CRM.
463-107447	Install / Upgrade	License Key Update application shows incorrect message when changing version from one trial key to another trial key.	Known issue.
476-108387	Install / Upgrade	Occasionally, after a new install, the Tomcat service remains in a "stopping" state. Intermittent issue.	Known issue. Workaround is to restart the Tomcat service.
434-108698	Interactive Dashboard	Non-admin demo users (e.g. Susan Maye) can access the Edit and Link buttons on gadgets on assigned dashboards. They should not be able to, as changes to gadgets on assigned dashboards are not supported.	Known issue.
463-108198	Interactive Dashboard	User Activity Timeouts on the Interactive Dashboard give different informational messages than for the rest of the product.	Known issue.
475-108359	Interactive Dashboard	A maximum of 6 workflow actions per record can be displayed on the Interactive Dashboard.	Known issue.
434-108637	Interactive Dashboard	A user with no access to Solutions is able to use available reports, groups, and advanced finds based on Solutions as data sources when creating Chart, SData, or Summary gadgets.	Known issue.

Ref ID	Area	Description	Status
434-107719	Interactive Dashboard	If a user is assigned a dashboard which contains gadgets based on an entity that the user does not have permissions for, and the user attempts to select the "Go To Summary Screen" icon, they are logged off the system.	Known issue. Do not assign users dashboard gadgets based on entities that they do not have rights for.
475-108427	Interactive Dashboard	Workflow rule names must have translations created for languages other than US English, or they will display as blank in the Interactive Dashboard.	Known issue. The workaround is to manually add the translations for the new rules in the languages required.
475-107704	Interactive Dashboard	Restarting E-mail Manager Service caused "Dashboard has experienced a problem" error.	Known issue. Lock the system before restarting services. Users can access the Dashboard when they log back in again.
434-108010	Interactive Dashboard	Workflow actions on gadgets do not display global rules.	Known issue. Workaround is to click into the Summary details for the record to carry out global rule workflow actions.
463-107975	Interactive Dashboard	If user doesn't have any Classic Dashboards, then it is not possible to switch to the Interactive Dashboard.	Known issue. Workaround is to create a classic dashboard.
332-108440	Interactive Dashboard	This affects Demo installs of CRM only. When you disconnect a demo server that is a laptop from the network (by undocking it from a docking station), the Interactive Dashboard stops working.	Known issue. Workaround is to make the following changes: a) C:\WINDOWS\system32\drivers\etc\hosts – add the line "127.0.0.1 [laptop name]". b) C:\Program Files\Sage\CRM\crm\tomcat\webapps\crm\j\WEB-INF\jdbc.properties – change "[laptop name]" to "localhost".
475-108464	Notification	Escalation Service is sending e-mails when Use Escalation Service set to No.	Known issue. The workaround is to set Use Escalation Service to Yes and stop the escalation service.
475-108037	Sales Forecasting	Opportunity forecasts do not roll up to Forecast Entry when financial year is changed from the default.	Known issue.
332-107712	SData Provider	Must restart Tomcat after adding a new field to an entity.	Known issue. Workaround is to restart Tomcat.
261-108293	Translation (English prod)	Forecasts quarter drop-down selections go up to Q4 2010.	Known issue. Workaround is to add a new translation - Caption Code: 2011-Q1, Caption Family: Quarter, Capt Family Type: Choices, Translation (US/UK etc.): 2011 - Quarter 1. This should be repeated for each quarter.
106-107856	Localization	Extended character inline images not displaying in Windows 2008.	Known issue. Current workaround is to add an additional input locale across the board or assign to individual users. This means you can still, for example, work in a Display Language of English but with an input locale of Simplified Chinese (SC) - meaning SC characters will be supported and images with SC Characters will display.

## Supplementary Information for Documentation

The following cases provide supplementary information to the Documentation and Help shipped with Sage CRM version 7.0.

Ref ID	Area	Description	Status
410-106147	Cases	Korean characters not displaying correctly in Person or Case Summary reports if FOP Unicode font not installed.	Closed. If you are running reports containing extended characters, you must ensure you have the Arial Unicode MS font (ARIALUNI.TTF) installed, otherwise the extended characters will not display. Please refer to additional notes section for more information.
135-106429	Currency	Multiple currencies showing for comp_revenue drop-down selections.	Fixed. Translations for Comp_Revenue are the same (\$) across all languages.
261-84265	Document Plugin	Error when closing down CRM from Document plugin page if Skype Mastermind plugin installed.	Closed. Skype plugin issue. If you experience errors while using IE 7 in combination with the Skype plugin, Mastermind, it is recommended that you temporarily disable the Mastermind plugin, or upgrade Skype to the latest version. More information can be found on Skype's web site.
410-108028	Documentation	Custom themes will not display correctly without rework.	Closed. It is recommended practice to carry out rework of custom themes on a staging site before allowing users access to the upgraded system. Please refer to the System Administrator Guide for more details.
475-108613	Install / Upgrade	On some machines an error is seen on the Interactive Dashboard due to missing Windows updates.	Closed. You must ensure that your server has the following Windows update installed: Microsoft .NET Framework 3.5 Service Pack 1 and .NET Framework 3.5 Family Update for .NET versions 2.0 through 3.5 (KB951847) x86. See <a href="http://support.microsoft.com/kb/951847">http://support.microsoft.com/kb/951847</a> for details.
475-107734	Install / Upgrade	Windows 2008 x64 HTTP 500 error when 32 bit set to False.	By design. If you are installing on Windows 2008 x64, you need to enable 32 bit ISAPI.dll to run on IIS 7.0 x64 for all application pools under the DefaultWebSite. Please refer to additional notes for details.
475-105862	Install / Upgrade	Intermittent error in upgrade of a customized database when SQL Server 2000 is upgraded to SQL 2005. If a database column has a statistic or index on it, it may cause CRM to have an error during the upgrade process.	By design. Indexes or statistics are not removed from the databases during upgrade. It is important that each of these errors is recorded and rectified to ensure CRM is upgraded completely and successfully. Automatically created indexes / statistics names would be begin with '_dta_index_' or '_dta_stat_' respectively and can be safely deleted in order to upgrade successfully.

Ref ID	Area	Description	Status
475-107449	Install / Upgrade	Version 7.0 ships with demo interactive dashboards and demo gadgets. These demo gadgets rely on specific data sources being present in the CRM install in order to display. If these data sources have been removed or have been heavily customized prior to the upgrade then these gadgets may not display correctly when viewed in 7.0 after upgrading.	By design. Please also refer to Interactive Dashboard   Adding New Data Sources section of the 7.0 User Guide and to the Component Manager   Scripting Customization section of the 7.0 Developer Guide.
383-108094	Install / Upgrade	Log on button appearing in blue color after upgrade if cache not cleared.	Closed. Clear browser cache to resolve issue.
332-106779	Install / Upgrade	Tomcat Service not starting when install path includes extended characters.	Closed. Including extended characters in the installation path/folder is not supported in v7. If you wish to include such characters, you will need to implement a workaround. A suggested workaround is to run Tomcat as a service using the .NET tool RunAsService. This is an open-source tool ( <a href="http://runasservice.sourceforge.net">http://runasservice.sourceforge.net</a> ) which registers a .NET Windows service that is configured to run any executable.
0-106509-ENH	Install / Upgrade	ISAPI handler mappings need to be manually enabled in IIS7/Windows 2008.	Fixed. Execute permissions set by installer.
434-99498	Interactive Dashboard	Admin/Info Admin users can create template gadgets based on their own Private Groups.	Fixed. Private Group data sources are not available when setting up template gadgets.
434-103939	Interactive Dashboard	Could not display Web Site gadget content when offline.	Fixed. Web Site gadget can display a static URL. To define a static URL in the Web Site gadget, the URL must begin with the text #crm_server#. The actual HTML files must be placed in a folder off the WWWRoot folder. Please refer to additional notes section for more details.
0-105499-QA	Quotes / Orders	Line items not showing German special characters in quote or order mail merge.	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).
106-106304	SData Integration	Underscores used in host names caused errors in SData ERP integration synchronization. Also impacts SData feeds or RSS feeds that are connected via the Interactive Dashboard.	By design. Underscores in host names are not supported. If you have host names with underscores in them and do not wish to change them, a DNS mapping could be added to the server IP Address that is used for the SData integration, in order to work around this issue. However, please note that adherence to industry standards for host names is the recommended solution.

Ref ID	Area	Description	Status
<b>476-106810</b>	SData Integration	Hyperlinks for ERP selection lists showing for normal users on Account, Quote and Order Summary screens.	Fixed. Hyperlinks are not displayed for non-admin users.
<b>0-86546-QA</b>	Self Service	Error on Self Service demo web site when clicking on Problem Details hyperlink after upgrade.	Closed. This issue has been resolved in new installs of 7.0. After upgrade the error may still occur, however this can be manually rectified by setting a custom jump on the hyperlink field. The Custom File should be set to casedetail.asp and the Custom ID Field should be set to case_caseid.
<b>332-107029</b>	Soap Integration	An error occurred when filtering Real Time Data by date.	Fixed. Please note: if you make customizations in CRM (i.e. use component manager to record customizations and then export them as XML), and then try to use these customizations with an integration, in particular for use with real-time data, the integration developer needs to take note of the fact that all field names in the customizations file will be in lower case. The developer needs to change them (i.e. add proper capitalization) if his/her sync engine/web service/ERP database is case sensitive.
<b>17-106096-QA</b>	Solo	Errors on Solo Client logon page on Windows 7.	Closed. To install Solo Client on Windows 7, please make sure you have selected all of the check boxes within: IIS Web Management Tools, IIS Web Management Tools   IIS 6 Management Compatibility, and IIS   World Wide Web Services   Application Development Features.

## More Notes on this Release

The following notes provide supplementary information to the Documentation and Help shipped with Sage CRM version 7.0.

### Oracle 10g

Sage CRM v7.0 supports installations on Oracle 11g only, this is in line with Oracle's premium support ending in July 2010 for Oracle 10g. Sage CRM v6.2 is fully supported on Oracle 10g. Those customers wishing to remain on this version of Oracle may continue to work with v6.2.

### Windows 2008 and IIS 7

Case reference: 475-107734. If you are installing on Windows 2008 x64, you need to do the following after the install for all application pools under the DefaultWebSite.

To enable 32 bit ISAPI.dll to run on IIS 7.0 x64:

1. Click the **Application Pools** node.
2. Select the **AppPool** item you want to change.
3. Select **Advanced Settings** from the Actions panel.
4. On the Advanced Settings dialog box, set **Enable 32-bit Applications** to **True**.
5. Click **OK**.

**Note:** Oracle is not supported for 64-bit Operating Systems.

### Concurrent Http Sessions in IE

If you experience performance issues with IE, it may be due to the number of http connections open at any one time (for example, multiple tabs within a single browser session, one of which is CRM, with a dashboard including multiple RSS feeds). To prevent this issue affecting CRM performance, it is recommended that CRM is opened in its own browser window.

## Defining a Static URL in the Interactive Dashboard Web Site Gadget

Case reference: 434-103939. The Web Site gadget can display a static URL. To define a static URL in the Web Site gadget, the URL must begin with the text #crm\_server#. The actual HTML files must be placed in a folder off the WWWRoot folder.

Example 1.

```
#crm_server#/StaticContent/abcd.html
```

Relates to a file called abcd.html in a folder created off the WWWRoot folder called StaticContent.

Example 2.

```
#crm_server#/StaticContent/#language#/ecosystem/CommunityLinks.htm
```

Relates to a folder created off the WWWRoot folder called StaticContent, which contains an optional placeholder that picks up the language of the user (it would appear on the file system as WWWRoot\StaticContent\uk\ecosystem\CommunityLinks.htm)

## Installing ArialUnicode MS font

Case reference: 410-106147. If you are running reports containing extended characters, you must ensure you have the Arial Unicode MS font (ARIALUNI.TTF) installed, otherwise the extended characters will not display. To install the font:

1. Copy arialuni.ttf from windows\fonts folder to c:\program files\FOP\ folder.
2. Edit the c:\program files\FOP\fonts.bat file, (read the notes inside this file) i.e. replace the placeholder filename with arialuni. Close the batch file and then run it.
3. Copy the resultant XML file into the c:\program files\FOP\Fonts\ folder.
4. Edit the C:\Program Files\FOP\conf\userconfig.xml file. Add the following lines of xml:

```
<font metrics-file="fonts/ArialUni.xml" kerning="yes" embed-  
file="c:/windows/fonts/ArialUni.ttf"> <font-triplet name="ArialUnicodeMS"  
style="normal" weight="normal"/> <font-triplet name="ArialUnicodeMS"  
style="normal" weight="bold"/> <font-triplet name="ArialUnicodeMS" style="italic"  
weight="normal"/> <font-triplet name="ArialUnicodeMS" style="italic"  
weight="bold"/></font>
```

**Note:** Make sure the value for the embed-file tag exists (e.g. it might be, c:\winnt\):

```
embed-file="c:/windows/fonts/ArialUni.ttf"
```

5. Reset IIS.

## Install Check List

If you experience issues during or after an upgrade or install of v7.0, the table below includes a basic check list of settings to verify. The SETUP.LOG (in ..\Program Files\Sage\CRM\[*install name*]\Setup) should also be reviewed.

Task/Area	Description
TCP/IP Enabled	For SQL Server (and SQL Express) installations check that TCP/IP is enabled (Start   Programs   SQL Server   Configuration Tools   SQL Server Configuration Manager). Once you have made this change, you will need to stop and start SQL Services as well as Apache Tomcat and IIS services before the change takes effect.
Confirm all service and logon details	For Oracle installations, check the Oracle Service Name, Database Server, and TableSpace details on the Oracle Login Details page of the CRM install.
IIS Settings	<ul style="list-style-type: none"><li>• Check that the DefaultAppPool is running and assigned to NetworkService.</li><li>• Check that the CRM AppPool and CRMUrlRedirector AppPool are set to run using the Local System user.</li><li>• In the case of IIS 7, check that handler mappings have been granted execute permissions.</li></ul>
Apache Tomcat Service	<p><b>Legacy Tomcat Services</b></p> <p>Make sure there are no legacy Tomcat services.</p> <ul style="list-style-type: none"><li>• Go to Start   Run and type services.msc and review the list of services.</li></ul> <p>Alternatively you can access the service list by navigating to Control Panel   Administrative Tools   Services.</p> <p>Should you find a Tomcat service that is not related to your current installation you can remove it by:</p> <ol style="list-style-type: none"><li>1. Noting the name of the service, for example tomcat6w.</li><li>2. Open a command line window.</li><li>3. Type the command SC Delete [service name]</li></ol> <p>You should see a confirmation message to notify you this has been removed.</p> <p><b>JDBC Connection</b></p> <p>You will find the jdbc properties file in: \\Program Files\Sage\CRM\[install name]\tomcat\webapps\installname\WEB-INF</p> <p>Confirm that the database connection settings are correct.</p> <p>Check the Port allocation within the file:</p> <ul style="list-style-type: none"><li>• Port 1433 for SQL installations</li><li>• Port 1521 for Oracle</li></ul> <p>Check the Oracle connection settings. They should be in the format outlined below:</p> <ul style="list-style-type: none"><li>• jdbc:log4jdbc:oracle:thin:@HOST:PORT:ORACLE_SID</li><li>• HOST is real machine name not TNS name</li><li>• PORT default is 1521</li></ul> <p>ORACLE_SID is the name that can be seen under Services: OracleServiceCRM</p>

