

Software Update

ProspectSoft CRM Version 5.20.000 EBF 4 Release Notes

Target Readership

This Document is intended for use by anyone currently running release 5.20.000 (or 5.20.000 with an earlier EBF applied) and experiencing the issues dealt with in this release.

Purpose

The Document describes the enhancements, fixes and other changes included in this release.

This Document does not deal with the details of how to perform the upgrade, other than where there are specific issues related to upgrading with this version. For general information on upgrading, please refer to the ProspectSoft [Installation Manuals Set](#).

Important

EBF's (Express Bug Fixes) are issued to particular customers who are experiencing particular issues. They do not undergo the full level of testing given to scheduled releases and should be used with care. Typically any update included in an EBF will be made fully available in the next scheduled update.

This update is issued as a minimal update, optimised for downloading from the Internet. It contains cumulative EBF updates but it does not contain the full install. For example: 5.20.000 EBF 2 can be applied to any 5.20.000 system, including any system running a 5.20.000 EBF.

Applying this update will remove any earlier EBF. If reverting to an earlier EBF, uninstall the existing EBF and repair the ProspectSoft CRM installation before installing this EBF.

No specific configuration actions are required as a result of this release but you should check all relevant release notes between your current version and this version for any actions that need to be considered.

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5.20.000 EBF 4 Enhancements

Extended time-out

Updated in 5.20.000 EBF 4

Ref: 86300

The time-out for version 5.20.000 of ProspectSoft CRM has been extended in this release to allow users to continue working uninterrupted with ProspectSoft CRM 5.20.000 while the upgrade to 5.50.000 is planned and carried out.

5.20.000 EBF 4 Updates

Contacts unexpectedly removed from campaign manager and mail merge wizard

Reported in 5.20.000 EBF 2

Updated in 5.20.000 EBF 4

Ref: 83671, 83463, 80850, 83571, 80904, 83861, 86687, 86078, 83413, 80850

Symptoms: When using the campaign contacts or mail merge wizard to select contacts the contact list will sometimes be unexpectedly deleted, sometimes this will generate an error code from Prospectsoft CRM of -3. This issue is most prominent if the user spends a large amount of time in the wizard adding and removing contacts.

5.20.000 EBF 3 Updates

Unable to edit B2C Addresses after scrolling

Reported in 5.20.000

Updated in 5.20.000 EBF 3

Ref: 2093

Symptoms: After loading a B2C contact detail window from a list, modifying the address, accepting the change and then scrolling to the next record, the user is then unable to edit the address of the second record.

Solution: This has been corrected and address details are now modifiable after both scrolling forwards and backwards in the list.

5.20.000 EBF 2 Updates

Deleted Phone Records in telephony list

Reported in 5.05.002

Updated in 5.20.000 EBF 2

Ref: 59085, 60930, 74970, 13427

Symptoms: Phone numbers that have been deleted from the “Phone No’s” tab on a contact record are still showing in the telephony tab. Deleted phone numbers no longer appear in either the search results on an incoming call or on the list of numbers that can be dialled when viewing a record.

Unsent e-mails do not save correctly

Reported in 5.20.000

Updated in 5.20.000 EBF 2

Ref: 75601

Symptoms: If a user pauses during composition of an email and closes the document window they will be given the chance to store a copy of the document. However selecting “yes” to save will not correctly store the changes in the database and the document will appear blank when the details are next loaded. Saving of emails that have been sent works without issue.

Pocket tab on contact records not appearing

Reported in 5.20.000

Updated in 5.20.000 EBF 2

Ref:

Symptoms: The pocket tab is not appearing on contact records even if there are PDA users active in the ProspectSoft CRM system.

Cannot give users access to pocket data

Reported in 5.20.000

Updated in 5.20.000 EBF 2

Ref:

Symptoms: In some cases a message stating that there are not enough pocket licenses will be displayed when trying to give pocket access to a user in the users admin table even if enough licenses are available with the current license for the system.

Opening saved email opens packager wizard

Reported in 5.20.000

Updated in 5.20.000 EBF 2

Ref: 78228

Symptoms: On some Windows Vista machines opening a saved email document with the “View Document” or “Edit Document” button will open the Microsoft Packager Wizard instead of the email itself. Right clicking on the email and selecting “Edit Package” opens the document correctly.

5.20.000 EBF 2 XML API Enhancements

Close.before event on document window

Updated in 5.20.000 EBF 2

Ref: 76106

A `w_sheet_detail_document.close.before` event has been added when a document detail window closes. This event will occur before all messages relating to the saving of a document to ensure that the close can be cancelled by an XML API application if required.

Close.after event on document window

Updated in 5.20.000 EBF 2

Ref:

A `w_sheet_detail_document.close.after` event has been added when a document detail window closes. This event will not actually occur after the close but does occur after all processing and save message popups to ensure that when this event fires the closing of the window is inevitable.

5.20.000 EBF 1 Updates

Document Standard Text insert order

Reported in 5.20.000

Updated in 5.20.000 EBF 1

Ref:

Symptoms: ProspectSoft CRM is not correctly ordering the sequence in which Standard Text Paragraph's are pasted into a document. This only creates a problem when nesting text paragraphs within each other, and only when entered into the database in a different sequence in which they need to be used.

Solution: The standard text paragraphs are now inserted in sequence order to ensure that they can be nested correctly.