

Software Update

ProspectSoft CRM Version 5.20.000 Release Notes

Target Readership

This document is intended for use by anyone currently running a ProspectSoft CRM release of version 5.10.001 or below.

Purpose

These Release Notes describe all enhancements, fixes and other changes included in this release and any patches since the last full version release.

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

Important

There are no 'must-do' configuration updates, but you should be aware of the following:

- Some systems not running the latest version of Microsoft Windows Scripting may need to be rebooted when performing this installation.
- If you are running ProspectSoft CRM Demo and using the XML API on your live ProspectSoft CRM system it is recommended that you update both your Demo and Live installations at the same time to avoid possible conflicts.
- This version of ProspectSoft CRM may not include custom EBFs (numbered 1xx or 2xx) from previous versions. Please contact ProspectSoft support if you are running one of these EBFs to check if this version is compatible with your system.
- This version of ProspectSoft CRM is compatible with Windows Vista and the 2007 Microsoft Office System, however there are some points to be aware of when using these applications. For more information please consult the document [Using PSCRM v5.20 with MS Vista and Office 2007](#)

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5.20.000 Enhancements

New software licensing system

Updated in 5.20.000

Ref: 61242, 68568, 67537, 67137, 68919, 68561, 71615, 68433, 67096, 13350, 60791, 53710, 62020, 68753

ProspectSoft CRM version 5.20.000 includes a new software licensing process that replaces the physical parallel port system used in previous versions. All new systems and systems upgrading to version 5.20.000 will need to have a license key generated for them using the new licensing wizard provided by the application.

Due to the new license key the Net Sentinel service can now be removed from any ProspectSoft CRM servers where it is not needed for other applications. A command file ('Remove Netsentinel.cmd') is included on the 5.20.000 install CD to assist with this process.

For more information on the new licensing method please consult the document [Software Licence Application and Renewal with v5.20 onwards](#)

Improved Infobase searching

Updated in 5.20.000

Ref:

The Infobase searching algorithm has been improved to better order results in terms of their relevance and provide a more comprehensive set of results based on the search terms that were entered by the user.

Windows Vista compatibility

Updated in 5.20.000

Ref:

This version of ProspectSoft CRM is compatible with Windows Vista and should run "out of the box" on this operating system for the most part. There are some points which should be noted which are listed in the document [Using PSCRM v5.20 with MS Vista and Office 2007](#)

New reset database application

Updated in 5.20.000

Ref: 75390

The reset database application has been updated to include support for Windows Vista and UAC. Users running on Windows Vista should be aware that they may need to reset their database in order to update it to the latest version after updating to a new version of ProspectSoft CRM.

Office 2007 compatibility

Updated in 5.20.000

Ref:

This version of ProspectSoft CRM is compatible with the 2007 Microsoft Office system. More information can be found in the document [Using PSCRM v5.20 with MS Vista and Office 2007](#)

Testing License Restrictions Change

Updated in 5.20.000

Ref:

The testing license has been altered to allow a user to open 30 screens before needing to re-login. This is an update from the 20 screens that were allowed previously.

Extended length of search fields

Updated in 5.20.000

Ref: 71527

The search criteria windows in ProspectSoft CRM were previously restricted to only allow a search string as long as the size of the field on screen. This has now been updated to allow search strings of any size.

'Contno' column warning when adding campaign activity contacts

Updated in 5.20.000

Ref: 68563, 68550

When adding contacts to a campaign activity using a report the wizard will now check to see if the report being used has an appropriate contact number column named either 'contno' or 'contact_contno'. If this column does not exist then a warning message will be displayed.

Updates available messages

Updated in 5.20.000

Ref: 74830

The updates available and out of date warnings that are displayed on the ProspectSoft CRM login screen have been updated to give more warning when a version of ProspectSoft CRM is about to expire.

Pop-ups are now displayed after a version is over two years out of date warning a user that an upgrade is required as the version has now expired. These warnings will be displayed for 120 days to allow plenty of time for an upgrade to be organised.

After these 120 days of warnings a more critical message will be displayed stating that an upgrade is urgently required. These messages will last for 30 days until the software expires.

The hyperlink on the login screen has also been updated to inform a user when the version is more than a year out of date, this replaces the old message box that was previously used for this purpose.

Removal of contacts from campaign activity wizard

Updated in 5.20.000

Ref: 68725

In previous versions, removing a contact from the list in the campaign activity contacts wizard would cause the screen to refresh and the beginning of the list to be shown. This functionality has now been improved so that when a contact is removed from the list the selection will automatically move to contact immediately below. Combining this functionality with the sorting of the contacts list can greatly improve the speed and accuracy with which groups of contacts can be removed from a campaign.

Whitespace on imported product items from Exchequer

Updated in 5.20.000

Ref: 68901

A new system option now exists in the "General Options" section to allow a user to set whether the product item import for Exchequer Enterprise should trim white space from the product extended descriptions. The default value for this option is on which replicates the previous functionality of ProspectSoft CRM and will only import whitespace and new line characters on extended description lines once extended description text has been found.

Select contract window for problems

Updated in 5.20.000

Ref: 68602

The list of contracts that is displayed when creating a problem record has been updated so that it is not only sorted by the paid flag but also by the document and line numbers.

Lead Source drop down lists and column headers

Updated in 5.20.000

Ref: 71258

Some drop down lists and column headers are referring to the 'Marketing Sources' admin table as 'Lead Source'. These have been updated to 'Marketing Source'

New unsubscribe and bounce back Outlook wizards

Updated in 5.20.000

Ref: 69016

The unsubscribe and bounce back Outlook wizards have been updated to include the ability to easily set the keywords in an email that the wizards react to when classifying an email as a bounce back or unsubscribe. There is also now an option to set a default setting for whether a report is generated or not.

Date and time columns in document lists

Updated in 5.20.000

Ref:

The document lists under various record types have been updated to ensure that columns containing date and time are wide enough to display all information when a system is set up to use a long year format (e.g. 2007 instead of 07).

5.20.000 Demo Enhancements

New sales history graph xtra tab report

Updated in 5.20.000

Ref: 74339

The sales history graph included in the demonstration database as an xtra tab on the division level has been updated with a more modern looking 3D style.

5.20.000 XML API Enhancements

New setfocus action for editmask controls

Updated in 5.20.000

Ref: 71929

A new setfocus action is now available for editmask controls, simply call the setaction function on the WindowAction object with an action such as "w_response_detail_quotelne.em_costprice.setfocus". No parameters are needed for this action.

5.20.000 Updates

Send to Excel as displayed has incorrect formatting

Reported in 5.10.000

Updated in 5.20.000

Ref: 68301, 68740

Symptoms: The "Send to Excel as displayed" functionality was changed in ProspectSoft CRM version 5.10.000 to first save the file as formatted HTML and then open this in Excel. This method is significantly faster than the previous functionality that was available before version 5.10.000 and works with most reports without issue, however there are display issues with a small number of reports where the new method is used.

Solution: An option has been added to the File menu named "Send to Excel as displayed - Compatibility Mode". Although the new functionality should be used as a preference this option will use the same method of displaying data in Excel that was used in versions of ProspectSoft CRM before 5.10.000 and should allow reports that are incompatible with the new functionality to be used.

Deleting quotations does not delete child documents

Reported in 5.10.000

Updated in 5.20.000

Ref: 68567, 74519

Symptoms: Deleting a quotation record and selecting to cascade items does not delete document records stored under the quotation.

Division selection list has no minimise button

Reported in 5.10.000

Updated in 5.20.000

Ref: 2076

Symptoms: The 'Division Selection List' window returned after performing a division search has a close and maximise button but the minimise button is greyed out.

Lead product selection screen customisability

Reported in 5.10.001 EBF 1

Updated in 5.20.000

Ref: 75228

Symptoms: It is not possible to customise the heading of the 'product category list' on the product selection screen that appears when creating a lead.

Solution: This field is now customisable, use the following items in the customiser admin table:

Window: d_list_prodcatg

Field: prodcatg

Object type: dataobject

Set the title field to the desired text for this heading.

Campaign summary and activity summary tabs

Reported in 5.10.000

Updated in 5.20.000

Ref: 69036

Symptoms: The campaign summary and activity summary reports were not correctly displaying decimal values when these had been calculated. The values were instead being rounded to a whole number.

Crash after clicking mail merge finish button

Reported in 5.10.001 EBF 1

Updated in 5.20.000

Ref: 75307

Symptoms: With some reports containing specific information clicking the mail merge wizard finish button would cause a crash of the ProspectSoft CRM system.

5.10.001 EBF 4 Updates

Error setting sales order balance

Reported in 5.10.000

Updated in 5.10.001 EBF 4

Ref: 74346, 74267, 74492

Symptoms: For newly created sales ledgers in PSCRM, orders will not confirm to Opera II and an error message is instead displayed stating 'Error setting the sales order balance'.

5.10.001 EBF 3 Updates

Problem Analysis Matrix duplicate entries

Reported in 5.10.000

Updated in 5.10.001 EBF 3

Ref: 74419

Symptoms: With some configurations the Problem Analysis Matrix will display duplicate entries in the problem type drop down lists when creating a new problem record. In some cases the duplicate entries may replace other valid entries that should have existed in the drop down list.

Problem Analysis Matrix drop down list ordering

Reported in 5.10.000 EBF 2

Updated in 5.10.001 EBF 3

Ref: 13378, 35368

Symptoms: Although the ordering of PAM entries using the sequence number works without problem when using the Problem Type-Analysis Matrix admin table it is inconsistently applied to the drop down lists for problem type and analysis displayed when creating a problem.

Duplicate entries on Problem Analysis Matrix admin table

Reported in 5.10.000

Updated in 5.10.001 EBF 3

Ref: 74443

Symptoms: It is possible that duplicate entries can exist in the Problem Type-Analysis Matrix Admin Table. These entries do not cause any adverse affects when creating problems, however if one of these duplicate entries is modified in the admin table then all of the duplicates will also be affected.

Solution: Modifying a duplicate entry in the Problem Type-Analysis admin table will now only affect the modified entry and not any of its duplicates.

5.10.001 EBF 2 Updates

Confirming home currency order into Exchequer

Reported in 5.10.001 EBF 1

Updated in 5.10.001 EBF 2

Ref: 74332, 74296

Symptoms: Confirming a home currency quotation from ProspectSoft CRM into the Exchequer accounting system can cause an error to be thrown. The quotation will not be confirmed.

5.10.001 EBF 1 Updates

Already exists message when sending email from documents menu

Reported in 5.10.001

Updated in 5.10.001 EBF 1

Ref: 71798

Symptoms: If a user creates and sends an email from within the documents menu in ProspectSoft CRM a message will be displayed stating that the email already exists within ProspectSoft CRM and cannot be saved again. If the user then tries to send the email again it will be sent correctly.