

Software Update

# ProspectSoft CRM Version 5.50.002 Release Notes

## Target Readership

This document is intended for use by anyone currently running a ProspectSoft CRM release earlier than 5.50.002.

## 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

Please review the 'Important Notes' section on the next page before installing this version of ProspectSoft CRM. This is especially important if you are a current Opera 16 user, are running an EBF numbered 1xx or 2xx, are running a version of ProspectSoft CRM between 5.11.000 and 5.13.000, or currently have XML API applications loaded on your system.

## Important

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

- 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.
- Although it is possible to create admin table entries for product item and product category relationships in this version it is not currently possible to use these in the application. These relationship types will become fully available in a future version of ProspectSoft CRM.
- It is recommended that you log in to the Opera demo with an activation key of 'DEMO' to unzip the updated Opera demonstration data before running the accounts integration features in the demonstration version of this software.
- Patch versions of ProspectSoft CRM 5.50.000 such as 5.50.002 will be the last to support integration with Opera 16. Future versions, beginning with 5.51.000, will support Opera II only.
- If you have previously been running a version of ProspectSoft CRM between version numbers 5.11.000 and 5.13.000 and also have XML API applications installed you should contact ProspectSoft support before upgrading to version 5.50.002.
- The install program for this version of ProspectSoft CRM will only update versions 5.13.000 (Beta 1 and 2), 5.20.000, 5.30.000, 5.50.000 and 5.50.001. All other versions will need to be upgraded to one of these versions before 5.50.000 can be installed.
- The licensing options for small business CRM systems included with the demonstration version of ProspectSoft CRM 5.50.002 are based on the old small business systems and do not represent the new rules of the newly re-released small business CRM packages from ProspectSoft. These will be updated in a future version.

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## 5.50.002 Enhancements

### Margin field now editable on quote line window

Updated in 5.50.001

The quote line details window now allows the editing of the margin and the mark-up fields to automatically calculate a new selling price. Updating either of these newly editable fields will update all other related fields in the window automatically.

There is also a new system option that allows a minimum margin percentage to be set. A warning will be displayed to the user if they try and enter a quote line with a margin below this value.

### Opera internal notes import

Updated in 5.50.001

The Opera accounts import has now been extended to import the private memo data for a product. This field appears on the quote line details screen as "Internal Notes" to display notes that are intended for internal use but not for release to customers.

### Quote history tab on quote line window

Updated in 5.50.001

The 'Quote History' tab on the quote line details window now shows the quotation history for the entire division rather than the current contact that the quotation is being created under.

### Quote and sales history formatting on quote line details window

Updated in 5.50.001

The formatting for the "Sales History" and "Quote History" tabs on the quote line details window has been updated to show products that are in the same product category as well as identical products. Products that are identical will have black coloured text in the report with other products in grey text.

### 'Remote Statistics' and 'Remote Subscriptions' reports moved to 'Maintenance' folder

Updated in 5.50.001

The 'Remote Statistics' and 'Remote Subscriptions' reports have moved from the 'Admin Reports' folder to the 'Maintenance' folder for consistency.

### New warning when no contact assigned to inventory item

Updated in 5.50.001

A new warning has been added to warn the user if they try and create a problem on the problem list for an inventory item but have not set up either a main user or a support contact for that item. Previously ProspectSoft CRM would throw an error stating that 'contno cannot be null' which was unclear.

## 5.50.002 XML API Enhancements

### Auto settings of 'compoundoveralldiscount' field on quote object

Updated in 5.50.001

The 'compoundoveralldiscount' field on a quote object is now automatically set based on the settings for the sales ledger when saving the object, previously it was defaulted to the value of '1' which would work by default for all accounting systems apart from Sage. The value of the field is now automatically retrieved from the parent division's sales ledger record to ensure that it's value should not normally need to be overwritten by an XML API application.

## 5.50.002 Updates

### Recall emails stay in outbox

Reported in 5.10.001 EBF 1

Updated in 5.50.002

Symptoms: Systems running Microsoft Office Outlook 2007 experience the problem that all recall emails stay in the 'Outbox' folder of Outlook even though these emails have actually been sent.

### 'compoundoveralldiscount' setting when creating quotation

Reported in 5.50.001

Updated in 5.50.001 EBF 1

Symptoms: The 'compoundoveralldiscount' flag on a quotation defaults to the value of '1' on all quotations that are created on a contact where the associated division had no sales ledger. This is appropriate for most accounting systems but not for the Sage accounting system where overall discounts are added rather than compounded.

Solution: The system will now check to see if Sage accounting integration is in use for the current operating company and will set the value of the 'compoundoveralldiscount' field as appropriate. This functionality is also used when creating quotations through the XML API.

### Contact Search Options

Reported in 5.50.000

Updated in 5.50.002

Symptoms: Some of the search options for contact records (such as postcode and address) have been unexpectedly removed in version 5.50.000 of ProspectSoft CRM.

Solution: These search options have now been re-introduced.

### Customiser on new records

Reported in 5.50.000

Updated in 5.50.002

Symptoms: When creating new records for some record types in ProspectSoft CRM the customisations that are specified in the admin table do not correctly apply and the fields will be given their default settings. When opening an existing record the customisations are applied correctly no matter what record type is being opened.

### Sales ledgers by account manager not replicating correctly

Reported in 5.50.000 EBF 1

Updated in 5.50.002

Symptoms: If a division is updated with a new sales ledger account number then the sales ledger record will not be correctly replicated to any remote users using a "By Account Manager" subscription.

Solution: The database triggers have now been updated to ensure that sales ledger records are replicated to remote users subscribed using the "By Account Manager" publication when a division that is assigned to one of their account managers is given a new sales ledger id.

## Winword.exe staying open after mail merge

Reported in 5.20.000

Updated in 5.50.001

Symptoms: On some systems ProspectSoft CRM would cause multiple instances of Word to be loaded and the winword.exe application would stay open after completing a mail merge.

## Application error when opening S/L

Reported in 5.10.000

Updated in 5.50.000 EBF 1

Symptoms: An error will be thrown from ProspectSoft CRM if a user attempts to open a sales ledger which contains a very large memo (typically over 32,000 characters).

## Discount not correctly passed into Access Dimensions

Reported in 5.13.000 Beta 2 EBF 8

Updated in 5.50.001

Symptoms: Custom discounts are not being correctly passed through into Access Dimensions when an order is confirmed from ProspectSoft CRM.

## Cost and selling price on product item details screen

Reported in 5.13.000 Beta 6

Updated in 5.50.001

Symptoms: The cost and selling price fields on the product item details screen are not wide enough to accommodate some large values.

Solution: The fields have now been widened in order to be able to display larger values.

## Error on offline sales ledger account selection screen

Reported in 5.20.000

Updated in 5.50.000 EBF 1

Symptoms: An error occurs when clicking the 'OK' button on the sales ledger list when a user is working with accounts offline and is trying to assign a sales ledger to a division where the search that was performed returned no results.

## Product item search does not retain search type

Reported in 5.50.000

Updated in 5.50.001

Symptoms: The product item search does not correctly select the search type (exact match, pattern match etc.) for each field that can be searched on. This can give a user the impression that inconsistent search results are being returned.

## Sales History tab on quote line does not show when editing

Reported in 5.20.000

Updated in 5.50.001

Symptoms: The 'Sales History' tab on the quote line details screen correctly shows the sales history for the current item (plus related items in the same category) and customer when creating a new quote line, however when editing a quote line the tab is blank.

## Setting discount to 0 does not correctly recalculate price

Reported in 5.05.002

Updated in 5.50.001

Symptoms: Changing the discount field on the quotation line details window to 0 for a quotation line that currently has a discount does will not cause the price of the quote line to be correctly recalculated. Changing the discount field to any value other than 0 will cause the discount to be correctly recalculated.

## Can close mail merge wizard with mail merge document open

Reported in 5.50.000

Updated in 5.50.001

Symptoms: If a user is using the Mail Merge Wizard to perform a Microsoft Word based mail merge the cancel button on the wizard is disabled to prevent the user from closing the wizard preventing possible problems with mail merge files being locked, however, the 'x' close button on the wizard will still close the wizard.

Solution: The 'x' close button on the mailmerge wizard is now disabled when Microsoft Word is being used to complete the mailmerge.

## Spelling mistake on standard document search and replace fields section

Reported in 5.50.000

Updated in 5.50.001

Symptoms: In the search and replace fields selection area of the standard document admin table the tick box for 'Company/Division/Contact data' has a spelling mistake in the word 'Division' which is incorrectly spelt 'Divison'.

## Question mark on current situation checkbox

Reported in 5.20.000 EBF 2

Updated in 5.50.001

Symptoms: On some Windows XP and Windows Vista systems the question mark for the "update current situation" checkbox on the recall window is at the beginning of the text instead of the end.

## Exchequer single currency support

Reported in 5.20.000 EBF 2

Updated in 5.50.001

Symptoms: Trying to confirm an order from ProspectSoft CRM into an Exchequer system which only has single currency support will cause an error to be thrown.

Solution: ProspectSoft CRM now performs appropriate tests to ensure that it does not try to set information about currencies into single currency versions of Exchequer.

## Cannot perform mail merge with Word 2007 format .docx file

Reported in 5.20.000

Updated in 5.50.001

Symptoms: Although the mail merge functionality in ProspectSoft CRM correctly supports the Microsoft Word 2007 application it does not correctly support Word 2007 format .docx files due to the fact that it will always try to save them with a .doc extension.

Solution: The mail merge functionality has now been updated to fully support .docx files that are stored in standard documents and to allow users to choose external .docx files when creating a mail merge.

## Campaign enquiries reports

Reported in 5.50.000

Updated in 5.50.001

Symptoms: The 'Enquiries by Campaign Monthly' and 'Enquiries by Year and Month' reports were throwing an error when running with certain retrieval arguments, usually with dates in the range of October to December.

## 'Sales History by Customer and Product Table' report changed to home currency

Reported in 5.50.000

Updated in 5.50.001

Symptoms: The 'Sales History by Customer and Product Table' report was displaying the values for each line in the currency that the quotation had been created in. This caused problems with total values as they could potentially be the total of many different currencies.

Solution: The report has now been updated to display all values in the home currency; this ensures that the total values are calculated correctly.

## ProspectSoft CRM slow when receiving incoming call

Reported in 5.50.000 EBF 2

Updated in 5.50.000 EBF 102

Ref: 89989

Symptoms: When an incoming call is received ProspectSoft CRM becomes slow and unresponsive for a number of seconds.

## 5.50.002 Demo Updates

### B2B quotation table line colours

Reported in 5.20.000

Updated in 5.50.001

Symptoms: The line colours on the B2B quote table in the ProspectSoft CRM demo database do not always alternate correctly, this usually occurs if lines have been deleted from the quotation.

## 5.50.000 EBF 3 Updates

### Exchequer offline special pricing product descriptions

Reported in 5.50.000 EBF 2

Updated in 5.50.000 EBF 3

Symptoms: When Exchequer offline special pricing is in use and a user adds a new product to a quotation the product description is replaced with text indicating the price band of the special price that is in use.

Solution: This issue is related to new functionality introduced to allow special pricing product descriptions to be utilised in ProspectSoft CRM. As Exchequer does not support special pricing product descriptions the Exchequer accounts import has now been updated to bring through the default product description when importing the price list.

## 5.50.000 EBF 2 Updates

### Special pricing when online to Exchequer

Reported in 5.50.000

Updated in 5.50.000 EBF 2

Symptoms: Online special pricing when connected to the Exchequer accounting system is not pulling through the special price details for customers.

### Product category list sorting when creating lead

Reported in 5.50.000

Updated in 5.50.000 EBF 2

Symptoms: In previous versions of ProspectSoft CRM the product category selection list that appears when creating a lead was sorted by the sequence number, however in version 5.50.000 this has changed to being sorted by the category description.

Solution: The product category selection list has been changed so that it will now sort correctly by sequence number. If no sequence numbers exist, or there are duplicates, then the categories will be sorted by category description.

## 5.50.000 EBF 1 Enhancements

### Adding of carriage returns in custom table

Reported in 5.20.000

Updated in 5.50.000 EBF 1

Symptoms: When using a custom table (typically a quotation table) in Microsoft Word, any carriage returns within the data fields are being lost. A typical example of this is the extended product description field on a quotation line which is formatted into one long string when displayed in a custom quotation table.

## 5.50.000 EBF 1 Updates

### VAT Type code not set in Opera

Reported in 5.30.000 EBF 3

Updated in 5.50.000 EBF 1

Symptoms: The VAT type (it\_vattyp) field in Opera is not being correctly set when orders are being passed from ProspectSoft CRM to the accounting system.

### Switching Exchequer DB connections

Reported in 5.50.000

Updated in 5.50.000 EBF 1

Symptoms: Switching Exchequer connections from one operating company to another requires the user to manually select "work with accounts offline" and then "work with accounts online" in order for the connection to be switched correctly.

Solution: ProspectSoft CRM now automatically disconnects from the old Exchequer connection and reconnects to the new one when the operating company is changed. This will also work correctly if the change operating company prompt is displayed automatically by ProspectSoft CRM in response to a user event.

### Inventory / Contracts buttons on Problem

Reported in: 5.50.000

Updated in: 5.50.000 EBF 1

Symptoms: The inventory and contracts button on a problem detail screen are overlapping.