

Software Update

ProspectSoft CRM Version 5.51.001 EBF 1 Release Notes

Target Readership

This Document is intended for use by anyone currently running release 5.51.001 (or 5.51.001 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: 5.51.001 EBF 2 can be applied to any 5.51.001 system, including any system running a 5.51.001 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.

Contents

5.51.001 EBF 1 Updates _____	3
Save to CRM prompts for login on remote user's system _____	3

5.51.001 EBF 1 Updates

Save to CRM prompts for login on remote user's system

Reported in 5.51.001

Updated in 5.51.001 EBF 1

Symptoms: The Save to CRM application bundled with 5.51.001 requires that the user login when saving emails from Outlook to ProspectSoft CRM. For users who only connect online to the network database this is not a problem as they can use the checkbox to login automatically and then not be prompted again. However for mobile users who require the ability to connect to both the online and offline profiles they cannot use the "connect automatically" check box and as such need to interact with the login screen every time they perform a save to CRM which is not efficient.

Solution: The login screen used by Save to CRM and other applications has now been updated to include three options for those users that are saving their login details:

- Automatically select the running profile
 - This option will automatically log the user into the profile of ProspectSoft CRM that is currently running on their system.
- Always use this profile
 - This option will log the user into the selected profile automatically every time the application is launched.
- Always prompt me for a profile
 - When this option is selected the login screen will always be displayed for this application.

For Save to CRM users that work both online and offline the "Automatically select the running profile" option should be used. This will ensure that the Save to CRM application will connect to whichever profile is currently running in ProspectSoft CRM.

Note: With the option of "Automatically select the running profile" selected Save to CRM will attempt to connect to the demonstration profile if that is the only profile of ProspectSoft CRM currently running on a system. This can be useful for situations where the functionality of Save to CRM needs to be demonstrated or tested.