

# ProspectSoft CRM Version 5.51.001 Release Notes

## Target Readership

This document is intended for use by anyone currently running a ProspectSoft CRM release earlier than 5.51.001.

## 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:

- Opera 16 integration is no longer supported. This and future versions of ProspectSoft CRM will only support integration with Opera II accounting systems (limited support is still available for Opera II SQL).
- This version of ProspectSoft CRM includes many changes to the information imported from accounting systems to better standardise the data that is stored. As such it is advised that a full accounts import is performed as soon as possible after the installation of version 5.51.001.
- Version 5.51.001 will be the last version of ProspectSoft CRM to support Microsoft Office 2000 and Microsoft Office XP. Future versions of ProspectSoft CRM will require a minimum of Office 2003 for Office integration.
- 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 your ProspectSoft CRM support provider if you are running one of these EBFs to check if this version is compatible with your system.
- 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 your ProspectSoft CRM support provider before upgrading to version 5.51.001.
- 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 5.50.002. All other versions will need to be upgraded to one of these versions before 5.51.001 can be installed.
- In some rare cases a message may be displayed on upgrading that states that division records have been found with null operating companies. If this occurs please contact your ProspectSoft CRM support provider who will be able to provide you with a report that you can use to analyse which division records are the cause of the problem.
- Remote users may find that the dbsremot.ini file is overwritten during the update to 5.51.001. If this occurs then reconfiguration of all remote settings will need to be made. This is particularly important for Windows Vista users where the remote database is likely to have been moved.
- 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.

## Contents

<b>5.51.001 Enhancements</b> .....	<b>6</b>
Improved accounts import _____	6
Access offline special pricing _____	6
New fail-over licensing functionality _____	7
Product item relationships _____	7
Range on Exchequer product item import _____	7
Opera search keys updated when changing company name _____	7
Allowing of order confirmation to on-stop accounts _____	7
Edit address during order confirmation when integrated with Access accounts _____	7
Custom product category support for Access accounts _____	8
VAT registration code for sales ledgers in Access accounts _____	8
Product item dormant flag imported from Opera II _____	8
Import of consolidated invoices from Access Dimensions _____	8
Internal notes for products imported from Opera II _____	8
Sage support in Back Office Connection Wizard _____	8
All references search on product items _____	8
Search ref 1 & 2 imported from Opera II _____	9
Check for null division operating company fields _____	9
Sales history by product report additional info _____	9
Automatically update problems when inventory contact changes _____	9
Number of eCRM logins restriction removed _____	9
Better eCRM/CMS contact login security _____	9
Enhanced Database Security _____	9
Unique key value in Opera II _____	10
Software timeout removed _____	10
Invoice address for cash orders _____	10
Import alternate references from Exchequer _____	10
Updated Save to CRM Outlook add-in _____	10
Restriction on connection parameters admin table _____	10
Problem numbers and lead numbers added to Save to CRM window _____	11
<b>5.51.001 Demonstration Data Enhancements</b> .....	<b>11</b>

Opera II demo data _____	11
New quotations added and Opera II invoices created _____	11
<b>5.51.001 XML API Enhancements.....</b>	<b>11</b>
Sales Ledger Xtra XML API object _____	11
Application.login.after event _____	11
New “rowfocuschanged” event on datawindows _____	11
Window action to get current operating company _____	12
Window action to get accounts connected status _____	12
<b>5.51.001 Updates .....</b>	<b>12</b>
Sales ledger import requires warehouse import _____	12
Product item list in product category detail view not sorted _____	12
Credit line date incorrect when imported from Opera II _____	12
Sort-able columns in advanced search _____	13
End of file error on Exchequer accounts import _____	13
195 error on Opera discount matrix import _____	13
No Access Dimensions sales history displayed for some divisions _____	13
“Sales History by Product and Period” quantity incorrect _____	13
Exchequer POs recognised as duplicates when confirming quotation _____	14
Customer Reference not carried through to Dimensions _____	14
“In Stock” quantity mask not applied _____	14
Deleted campaigns not removed from list _____	14
Foreign currency values incorrect when posting orders to Exchequer or Access Dimensions _____	14
Sales ledger telephone field not imported from Access _____	15
“Division by Zero” on purchase history _____	15
Large quantity and quantity decimal values on quotes _____	15
Access Dimensions sales history importing negative quantity values _____	15
System error emails not being sent _____	16
Back Office Connection Wizard overwrite warning _____	16
Special Pricing System option not working _____	16
Quantity change resets quote line prices to default _____	16
Quantity resets to 0 after warehouse change _____	16
Quantity resets to 0 after VAT code change _____	16
Sort sequence on campaign contact tabs _____	17
Users disconnected when not enough licenses _____	17

View/disconnected users with more than one database _____	17
Error 60 on setting sales ledger with Access accounts _____	17
Advanced search support for account manager by division _____	17
Offline order confirmation wizard with Access Dimensions _____	18
Account manager warnings when system set to use account managers by division _____	18
Restriction on searchable problem types with Infobase search _____	18
Exchequer invoices import does not set invoice account field correctly _____	18
Busy numbers automatically disconnected when telephony module active _____	19
'contact_initial' field in mail merge default output format _____	19
Recall List Sorting _____	19
Deleting campaign activity does not update parent campaign cost _____	19
Paid invoices being marked as unpaid in ProspectSoft CRM _____	19
'Sales History by Product and Period' report updates _____	19
Customisation of Opera order confirmation screen _____	20
<b>5.51.001 XML API Updates .....</b>	<b>20</b>
"ImportString" error on some windows when XML API plug-ins enabled _____	20
"Calculatediscount" and "calculatedefaults" produce incorrect results _____	20
User interface object on offline profile _____	20
Cannot write to product item using XML API _____	21
<b>5.51.001 Demonstration Data Updates .....</b>	<b>21</b>
"Buying Pattern" quote xtra tab _____	21

## 5.51.001 Enhancements

### Improved accounts import

Updated in 5.51.001

Numerous updates have been made to the accounts import functionality in ProspectSoft CRM version 5.51.001. These include:

- More flexible licensing - The accounts import can now be left running on a machine without using a network license.
- Better scheduling – The import can now be run on an “as needed” basis or be scheduled to run daily at a set time or at set intervals throughout the day. Note: If a scheduled accounts import is configured it should be disabled when running any accounts processes that may require an exclusive connection to the accounting system.
- Improved import messages and summary – A summary of the import is now generated to allow any problems to be easily identified and diagnosed. Additionally error messages now include more information about problematic data.
- Automatic email on completion – A system option is now available where an email address can be entered that will be emailed with a copy of the import summary on completion of the accounts import.
- Option to disconnect from accounts system – A system option has been added to force disconnection from the accounting system when an accounts import has finished. This can be very useful in the case where long standing connections to the accounting system are preventing other tasks such as backups.
- Select all and unselect all options – Select all and unselect all options are now available on the accounts import screen to enable or disable the import of all tabs.

### Access offline special pricing

Updated in 5.50.002 EBF 100

A basic level of support has been introduced for Access special pricing so that when entering quote lines while offline to accounts or when using an XML API plug-in (such as Rapid Order Entry) the system pulls through the correct customer price rather than the list price.

Note: Some limitations apply. Currently only the following functionality is supported:

- Access price matrix configured using customer and stock code – The use of user sort keys instead of customer or stock code is not supported.
- Access price matrix configured with fixed prices only (type 'F') – The use of percentage discount (type 'D') or percentage price (type 'P') is not supported.
- Customer price keys from 1 to 10. Price Key 0 (quantity breaks) in Access is not supported.

Other points to note:

- The ISO codes must be defined for the currencies in Access (Access Trading Currencies screen)
- The price list import is likely to bring in a large number of records so it is best left to run overnight. A complete currency and sales ledger import will also needed to be run for the special pricing to function correctly.
- The range fields available in the pricelist import are applied on the price key or the customer code; this allows special prices to be imported for specific customers or for a particular price key.

## New fail-over licensing functionality

Updated in 5.51.000

New functionality has been added to the licensing system in ProspectSoft CRM to allow a fail-over key to be generated that will be automatically used if licence key validation fails when logging into the system using the standard license key. This functionality is designed for use on ProspectSoft CRM systems which run simultaneously on a main server and a fail-over server and switch automatically to the fail-over server in the case of a technical problem.

## Product item relationships

Updated in 5.51.000

It is now possible to create relationships from or to product items or product categories.

## Range on Exchequer product item import

Updated in 5.51.000

It is now possible to provide a range of product codes when importing products from Exchequer

## Opera search keys updated when changing company name

Updated in 5.51.000

The company search keys in the Opera database are now correctly updated when the company name is changed on the Opera address change pop-up window in ProspectSoft CRM.

## Allowing of order confirmation to on-stop accounts

Updated in 5.51.000

A new system option has been added to allow control over whether orders can be confirmed to accounts that have been set as on-stop. There are three possible settings for this option as described below.

- Orders are not allowed to be confirmed if the account is marked as on-stop. (Default)
- Orders are always confirmed even if the account is on-stop.
- Prompt the user each time a user attempts to confirm an order to an account that is marked as on-stop.

## Edit address during order confirmation when integrated with Access accounts

Updated in 5.51.000

The delivery address can now be edited “on the fly” from the order confirmation screen when connected to an Access Dimensions accounting system. The changes to the address are posted back to the accounts system as the order is confirmed.

## Custom product category support for Access accounts

Updated in 5.51.000

Support has been added to allow the linking of user created product categories in ProspectSoft CRM to product items imported from Access Dimensions. In order to use this functionality you should create the product categories and linking using the appropriate admin tables and then ensure that the system option has been set to exclude the product category field from the product item import.

## VAT registration code for sales ledgers in Access accounts

Updated in 5.51.000

It is now possible to enter VAT registration details when creating an Access Dimensions sales ledger from ProspectSoft CRM.

## Product item dormant flag imported from Opera II

Updated in 5.51.000

The dormant flag from the Opera II accounting system is now recognised by the ProspectSoft CRM product item import. Items marked as dormant in the accounting system will be set to obsolete in ProspectSoft CRM.

## Import of consolidated invoices from Access Dimensions

Updated in 5.51.000

The sales history import will now correctly deal with situations where more than one order is invoiced together on one invoice document in the Access Dimensions accounting system.

## Internal notes for products imported from Opera II

Updated in 5.51.000

The stock memo field is now imported from Opera II into ProspectSoft CRM product item internal notes field. This is displayed on the quote line in the “Internal Notes” tab.

## Sage support in Back Office Connection Wizard

Updated in 5.51.000

An option for the Sage accounting system has now been added to the Back Office Connection Wizard. This option will assist the user in setting up their database prior to installing the Sage integration for ProspectSoft CRM.

## All references search on product items

Updated in 5.51.000

A new 'All references' search option has been added to the product item search which will search on the product reference code or any of the four altref fields in the product item table. In order to search on these fields they must have previously been imported from an accounting system or set manually.

## Search ref 1 & 2 imported from Opera II

Updated in 5.51.000

The product search reference fields in Opera II are now imported into PSCRM during the product item import. These can also be searched on using the new 'All references' products search available on the quote line product search and products list view.

## Check for null division operating company fields

Updated in: 5.51.000

A check has been introduced to the upgrade process for ProspectSoft CRM version 5.51.000 that will check if any of the division records are assigned with a null value for the operating company code. If such a record exists then the update will be blocked as the database is modified in this version to stop such a scenario from happening.

## Sales history by product report additional info

Updated in 5.51.000

The division name field has been added to the sales history by product report.

## Automatically update problems when inventory contact changes

Updated in 5.51.000

When a user changes either the main contact or the support contact on an inventory item they will now be presented with a message that will ask them if they would like to update all current problems for that inventory record to the new contact.

## Number of eCRM logins restriction removed

Updated in 5.51.000

The restriction on the number of eCRM logins that can be created is removed in this version.

## Better eCRM/CMS contact login security

Updated in 5.51.000

Any eCRM logins created for contacts will now have a secure hash of the password stored in the database in place of the password itself. This new functionality provides extra security for eCRM and CMS sites created using the ProspectSoft CRM database.

## Enhanced Database Security

Updated in 5.51.000

The security of the ProspectSoft CRM database has been enhanced to further prevent against unauthorised access. This ensures that the databases are suitable for use on web servers and other machines where a malicious attacker might be able to gain access to the machine itself.

## Unique key value in Opera II

Reported in 5.20.000

Updated in 5.51.000

Orders confirmed from ProspectSoft CRM to Opera II now include a unique value for the "ID" field in the "itran" table. These values start at -1 and increase negatively so as not to conflict with the values generated from the accounting system.

## Software timeout removed

Updated in 5.51.000

The timeout that causes versions of ProspectSoft CRM to stop working after they are no longer supported has been removed. Future versions of Prospectsoft CRM will run indefinitely although support will not be available for these versions after the dates announced by ProspectSoft.

## Invoice address for cash orders

Updated in 5.51.000

Functionality has been added to the order confirmation process so that when confirming orders against specific sales ledger codes (such as those for a cash account) the customer's address from ProspectSoft CRM is used as the invoice address rather than the address from the sales ledger account.

Note: This functionality is currently only supported for the Opera II accounting system.

## Import alternate references from Exchequer

Updated in 5.50.002 EBF 106

The products import for the Exchequer accounting system has been updated to also retrieve any assigned alternate reference for a product. These alternate references are stored against the altref1 field in the proditem table in the ProspectSoft CRM database and can be searched on using the new "All references" search for product items.

## Updated Save to CRM Outlook add-in

Updated in 5.51.000

The Save to CRM add-in for Microsoft Outlook has been updated in this version of ProspectSoft CRM. The new version is designed to be more reliable and to recover more gracefully from potential problems.

## Restriction on connection parameters admin table

Updated in 5.51.000

The connection parameters admin table can now only be accessed by users that have DBA rights on the database. This change was introduced to protect the sensitive database login information that must be stored in this table for some accounting systems.

## Problem numbers and lead numbers added to Save to CRM window

Updated in 5.51.000

New columns for problem and lead numbers have been added to the window that appears when using the Outlook Save to CRM functionality. This change also applies to the problem and lead tabs under a contact record.

## 5.51.001 Demonstration Data Enhancements

### Opera II demo data

Updated in 5.51.001

Demonstration data for Opera II is now installed with ProspectSoft CRM version 5.51.001. The data is compatible with the previous Opera 16 data but includes some extra items such as Invoice PDFs. Users of demonstration databases that are set up to connect to the Opera 16 data will be prompted to update to this new demonstration data when updating their databases to version 5.51.001.

Note: The Opera 16 data is still installed with 5.51.001 although it is not useable in this version. The data will be removed in a future version of ProspectSoft CRM.

### New quotations added and Opera II invoices created

Three extra quotations have been added to the demonstration database; two under Trevor Keating of AB Applications and one under J Brecker of Ace Electrical Supplies. The quotations have also been confirmed through into the new Opera II demo data and progressed to invoice stage. Invoice PDFs can be opened from the associated sales ledger records.

Note: You will need Adobe Reader installed in order to view PDF invoices from a sales ledger record.

## 5.51.001 XML API Enhancements

### Sales Ledger Xtra XML API object

Updated in 5.50.001

A new XML API object has been created to allow the reading and writing of data to and from the new sales ledger xtra table in the database.

### Application.login.after event

Updated in 5.51.000

The application.login.after event has been enhanced to include various properties that give details on the ProspectSoft CRM system that is running the XML API plug-in. These details include the application name, version and details on the database that is in use.

### New "rowfocuschanged" event on datawindows

Updated in 5.51.000

A new “rowfocuschanged” event has been added to all datawindow objects in the system which allows plug-ins to be triggered when the selected row of a datawindow has changed and to receive information about the newly selected row. This type of functionality is also possible using the clicked event on a datawindow object, however this new event also fires if the user is using the keyboard to change rows whereas the clicked event did not.

## Window action to get current operating company

Updated in 5.51.001

A new window action ‘getcurrentopco’ has been added which can be called by an XML API application to return a parameter of ‘opco’ which will contain the current operating company that is in use.

## Window action to get accounts connected status

Updated in 5.51.001

A new window action ‘getaccountsconnected’ has been added which can be called by an XML API application to return a parameter of ‘isconnected’ which will show whether the user is currently online to the accounting system.

## 5.51.001 Updates

### Sales ledger import requires warehouse import

Reported in 5.20.000

Updated in 5.51.000

Symptoms: The sales ledger import requires the import of warehouses so that the default warehouse can be set on a sales ledger record, however the warehouse import is only activated by the Products and Pricing module

Solution: The warehouse import tab is now available for systems with either or both the Sales Ledger Integration or Products and Pricing modules.

### Product item list in product category detail view not sorted

Reported in 5.50.000

Updated in 5.51.000

Symptoms: The product item list in the product category detail view is not sorted.

Solution: The list is now sorted by product code followed by product description.

### Credit line date incorrect when imported from Opera II

Reported in 5.50.000

Updated in 5.51.000

Ref: 92760

Symptoms: The inv\_invoicedate field for a credit line imported from Opera II is being set to the date when the credit was created instead of the date of the invoice that matches the credit.

## Sort-able columns in advanced search

Reported in: 5.50.000

Updated in: 5.51.000

Symptoms: Not all columns in the advanced search report trigger a sort when clicked on.

Solution: All advanced search reports have been reviewed and changed to allow sorting on all columns.

## End of file error on Exchequer accounts import

Reported in 5.50.000

Updated in 5.51.000

Symptoms: If no sales transactions are present in Exchequer the accounts import will display an “end of file” error message that requires user interaction.

Solution: This error message box has now been removed and an entry appears instead in the import log stating there are no transactions in Exchequer.

## 195 error on Opera discount matrix import

Reported in 5.10.001

Updated in 5.51.000

Ref: 83639

Symptoms: Opera allows a discount matrix to be set up without any reference to Product Group implying that all customers with this Discount Setting will receive the particular discount on all products. These discounts do not import correctly into ProspectSoft CRM and as such the offline pricing for the Opera accounting system does not apply these discounts.

## No Access Dimensions sales history displayed for some divisions

Reported in 5.50.000

Updated in 5.51.000

Symptoms: When integrated to Access Dimensions no sales history is displayed at division level for records that have a sales ledger code of 10 characters in length.

## “Sales History by Product and Period” quantity incorrect

Reported in 5.30.000

Updated in 5.51.000

Symptoms: In some cases the “Sales History by Product and Period” report is displaying sales history transactions with an incorrect quantity that is out by a multiple of 100.

## Exchequer POs recognised as duplicates when confirming quotation

Reported in 5.50.000

Updated in 5.51.000

Symptoms: The warning message to guard against duplicate orders that is displayed when trying to confirm a quotation from ProspectSoft CRM into the Exchequer accounting system is incorrectly displayed for some purchase order records. This will occur if the purchase order record has been given an alternate reference that matches a ProspectSoft CRM quotation number.

Solution: The check for duplicate orders when confirming into Exchequer is now restricted to only scan for sales records and will not scan for any purchase records.

## Customer Reference not carried through to Dimensions

Reported in 5.13.000 Beta 2

Updated in 5.51.000

Ref: 83200

Symptoms: If the Access Dimensions system option to make the customer reference field mandatory is turned off then the customer reference field will not be posted from ProspectSoft CRM when confirming an order.

## "In Stock" quantity mask not applied

Reported in 5.20.000

Updated in 5.51.000

Symptoms: The display mask is not being correctly applied to the "in stock" quantity value on the warehouse tab of a quote line.

## Deleted campaigns not removed from list

Reported in 5.10.001

Updated in 5.51.000

Symptoms: When a campaign is deleted from a campaign list or a campaign activity list, it leaves it visible but struck through. This is inconsistent with the other screens in the application where deleted items are not shown.

## Foreign currency values incorrect when posting orders to Exchequer or Access Dimensions

Reported in 5.13.000 beta 2

Updated in 5.51.000

Symptoms: In cases where the number of decimal places for the foreign currency in Exchequer or Access Dimensions is different from the number of decimal places configured for the product the foreign currency values that are posted to the accounting system will be incorrect. This occurs because the

system is using the product's number of decimal places instead of the amount configured for the foreign currency.

## Sales ledger telephone field not imported from Access

Reported in 5.50.000

Updated in 5.51.000

Symptoms: The telephone field on the sales ledger is imported as blank from? when importing from the Access Dimensions accounting system.

## "Division by Zero" on purchase history

Reported in 5.20.000

Updated in 5.51.000

Symptoms: A "Division by Zero" error will be thrown when trying to view the purchase history tab on any division where the purchase history includes products that did not have a decimal quantity.

## Large quantity and quantity decimal values on quotes

Reported in 5.13.000 Beta 2 EBF 9

Updated in 5.30.000 EBF 201

Symptoms: Entering an extremely large quantity for a product on a quote in ProspectSoft CRM will result in an invalid value which is sometimes negative. This error will typically occur when trying to quote for a very large quantity of a product which has been configured with a very large number of quantity decimal places.

Solution: The combination of a very large quantity and a very large number of quantity decimal places is exceeding the maximum possible value that can be stored in the database quantity field. The system has now been updated so that the number of quantity decimals is automatically reduced from the default when adding a very large quantity of an item to a quotation.

Note: Although the creation of quote lines with very large quantity and quantity decimal values will work for all accounting systems, the importing of the information back from the accounting system is only available currently for Access Dimensions. Technical limitations may also exist within some accounting systems which prevent large quantity values being used correctly.

## Access Dimensions sales history importing negative quantity values

Reported in 5.30.000

Updated in 5.30.000 EBF 201

Symptoms: Very large quantity values on order lines imported from the Access Dimensions accounting system are being populated in ProspectSoft CRM as incorrect values which are sometimes negative.

Solution: The very large quantity values are exceeding the maximum possible value that can be stored in the ProspectSoft CRM database. In order to address this problem the system will now automatically reduce the precision of the values being imported to use less decimal places in cases where the original value would not fit into the database field.

## System error emails not being sent

Reported in 5.10.000

Updated in 5.51.000

Symptoms: Automatic email notifications of system errors to the email address entered into the system options admin table are not being sent.

## Back Office Connection Wizard overwrite warning

Reported in 5.13 Beta 2 EBF 7

Updated in 5.51.000

Symptoms: No warning appears when using the Back Office Connection Wizard to overwrite settings for an existing operating company to use the Access Dimensions accounting system.

## Special Pricing System option not working

Reported in 5.50.000

Updated in 5.51.000

Symptoms: The system option to 'Use Accounting System Pricing When Online' has no effect and online pricing is always used even if this option is disabled.

## Quantity change resets quote line prices to default

Reported in 5.05.002

Updated in 5.51.000

Symptoms: When entering a quote line and setting a price, any subsequent change in the quantity will cause the price to reset to the original price.

Solution: A new system option now exists to limit the automatic changes to only automatically update the quote line price when it is the same as the product list price or customer's list price. This has the effect that any custom price that is entered will not be automatically overwritten. This option is disabled by default.

## Quantity resets to 0 after warehouse change

Reported in 5.50.000 EBF 1

Updated in 5.51.000

Ref: 89261

Symptoms: When entering a quote line and setting a price or quantity, any subsequent change in the warehouse will cause the quantity to be set to zero and the price to be reset to the original price.

## Quantity resets to 0 after VAT code change

Reported in 5.50.002

Updated in 5.51.000

Ref: 92044

Symptoms: When entering a quote line and setting a price or quantity, any subsequent change in the VAT code will cause the quantity to be set to zero and the price to be reset to the original price.

## Sort sequence on campaign contact tabs

Reported in 5.50.000 EBF 1

Updated in 5.51.000

Symptoms: The campaign and campaign activity contact tabs did not have any sort sequence.

Solution: The contacts are now sorted by division name, surname and then forename.

## Users disconnected when not enough licenses

Reported in 5.50.000 EBF 1

Updated in 5.50.000 EBF 103

Symptoms: If a user gets a “not enough licenses available” message when trying to log into ProspectSoft CRM and selects to view the current users that are connected to the database then there is the potential for other ProspectSoft CRM users to be disconnected from the database. This occurs because a database connection is in use for the entire period of time that the list is displayed causing other ProspectSoft CRM applications to think that there are not enough network database licenses.

## View/disconnected users with more than one database

Reported in 5.50.000

Updated in 5.51.000

Symptoms: The view/disconnect connected users screen shows details of users from all databases that are running under the same database service (a scenario most common when a company needs a specific partition between their data). This is confusing and also means that users can be disconnected from both databases.

## Error 60 on setting sales ledger with Access accounts

Reported in 5.50.002

Updated in 5.51.000

Symptoms: If no search results are returned when trying to assign a division to an existing sales ledger account from Access Dimensions then an error 60 will be displayed when the OK button is clicked.

## Advanced search support for account manager by division

Reported in 5.50.002

Updated in 5.51.000

Symptoms: Some of the advanced search reports did not correctly support the new account manager by division functionality.

## Offline order confirmation wizard with Access Dimensions

Reported in 5.50.002

Updated in 5.50.002 EBF 209

Symptoms: Although the offline order wizard appears to correctly process offline orders into the Access Dimensions accounting system the orders in ProspectSoft CRM are not correctly updated to state that they have been confirmed.

## Account manager warnings when system set to use account managers by division

Reported in 5.50.000

Updated in 5.51.000

Symptoms: Warnings that the user has not set an account manager for a company are still displayed when the ProspectSoft CRM system has been configured to allow the setting of account managers by division. Also, there are no warnings when an account manager has not been set on a division record.

Solution: The warnings have now been implemented correctly so that warnings on a company record are displayed when the system is configured to set account managers by company and warnings on division records are displayed when the system is configured to set account managers by division. These warnings are still only displayed if one or more mobile users have been configured with a "By Account Manager" subscription.

## Restriction on searchable problem types with Infobase search

Reported in 5.50.002

Updated in 5.51.000

Symptoms: The Infobase search accessible through the ProspectSoft CRM user interface is giving incorrect results in some cases where a user is trying to search problem types that are specified as not available to an e-CRM website user.

Solution: The Infobase search available within ProspectSoft CRM itself should have no restrictions due to problem type as a user of the ProspectSoft CRM system is deemed to have rights to search all Infobase entries. The search in this version has been removed of these restrictions (Note that the restrictions will still apply for searches performed on a website).

## Exchequer invoices import does not set invoice account field correctly

Reported in 5.50.002

Updated in 5.51.000

Symptoms: The Exchequer invoices import does not correctly set the value for the invoice account ('inv\_account') field when an invoice has been created on an account that has the "Invoice To" option set

in Exchequer. The invoice account field will be set to the account specified in the "Invoice To" option instead of the account where the order was actually placed.

Solution: The Exchequer invoices import now does a lookup to find each invoices corresponding order using the "Your Ref" field. If found it will use the account that the order was placed on as value for the invoice account field in ProspectSoft CRM.

## Busy numbers automatically disconnected when telephony module active

Reported in 5.50.002

Updated in 5.50.002 EBF 210

Symptoms: When dialling a number using either ProspectSoft CRM or manually using the phone keypad ProspectSoft CRM will immediately disconnect any call where the line is busy. In many cases the user will not receive any feedback about this as the disconnect happens immediately.

## 'contact\_initial' field in mail merge default output format

Reported in 5.50.002

Updated in 5.51.000

Symptoms: The 'contact\_initial' field does not exist in the mail merge default output format report as included with ProspectSoft CRM.

## Recall List Sorting

Reported in 5.10.000

Updated 5.51.000

Symptoms: The sorting that is implemented on the recall list means that it may change order when refreshed if multiple recalls are assigned for the same date / time.

## Deleting campaign activity does not update parent campaign cost

Reported in 5.50.002

Updated in 5.51.000

Symptoms: Deleting a campaign activity does not cause the cost of the parent campaign to be updated; the cost displayed is that of all campaign activities including any that have been deleted.

## Paid invoices being marked as unpaid in ProspectSoft CRM

Reported in 5.50.002

Updated in 5.50.002 EBF 109

Symptoms: Invoices that have been paid but that include trailing spaces in the invoice number when retrieved from the Opera II accounting system are not being marked correctly as paid in ProspectSoft CRM.

## 'Sales History by Product and Period' report updates

Reported in 5.50.002

Updated in 5.51.000

Symptoms: The 'Sales History by Product and Period' report is incorrectly returning results of obsolete lines and also handles B2C contacts incorrectly.

## Customisation of Opera order confirmation screen

Reported in 5.50.002

Updated in 5.50.002 EBF 110

Symptoms: While the Exchequer confirm order screen allows you to use the customiser to make certain fields mandatory, the confirm order screen for Opera does not allow this in the correct way; although the fields appear mandatory they are not checked when the 'OK' button is pressed and the order is confirmed with no warning messages.

## 5.51.001 XML API Updates

### "ImportString" error on some windows when XML API plug-ins enabled

Reported in 5.51.000 EBF 1

Updated in 5.51.001

Symptoms: In some cases on systems with particular XML API plug-ins enabled a user may experience errors regarding an "ImportString" function. These errors are connected with new functionality in ProspectSoft CRM version 5.51.000 which allows the XML of a datawindow object to be modified at runtime by changing the Event Message property.

Solution: Previously the system would detect that the XML property had been changed by comparing the result obtained from the Event Message object to the current XML of the datawindow. However, in some cases this was problematic as the XML had been changed by the application during the course of the XML API event and would then either be updated back to the XML that had been sent to the XML API application or would fail during this update.

In order to avoid this issue datawindow objects now store a copy of the XML that was sent using the Event Message object and will only attempt to retrieve this XML back if it has been changed by an XML API application.

### "Calculatediscount" and "calculatedefaults" produce incorrect results

Reported in 5.51.000

Updated in 5.51.001

Symptoms: The "calculatediscount" and "calculatedefaults" functions on the quote line XML API object are not correctly recognising overall discounts that have been entered against the quote header.

## User interface object on offline profile

Reported in 5.50.002

Updated in 5.51.000

Symptoms: Trying to run a WindowAction event on the offline profile will not run the event and will instead load a new copy of ProspectSoft CRM. Furthermore, logging into this version will not cause the event to run either.

Solution: This issue is due to the fact that when ProspectSoft CRM loads it does not know if the user will be logging into the online or offline profile and as such will set information about the running application as if it were an online profile.

To correct this ProspectSoft CRM will now assume that all applications on the login screen are running as a special login profile and will only set information about which profile is running after a user has logged in. The WindowAction object will now look for the correct profile first when trying to run an event but if no profile is found it will look for any applications waiting on the login screen and will process the event on this application instead.

Note: A distinction is still made between live and demonstration profiles that are waiting on the login screen.

## Cannot write to product item using XML API

Reported in 5.50.000

Updated in 5.51.000

Symptoms: Changes cannot be saved to the product item XML API object.

## 5.51.001 Demonstration Data Updates

### "Buying Pattern" quote xtra tab

Reported in 5.50.000

Updated in 5.51.000

Ref: 95682

Symptoms: The 'quote\_xtra\_buy\_pattern' report is summing the quantity values without taking the quantity decimals into account.