

ProspectSoft CRM Version 5.53.001 EBF 8 Release Notes

Target Readership

This Document is intended for use by anyone currently running release 5.53.001 (or 5.53.001 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: 5.53.001 EBF 8 can be applied to any 5.53.001 system, including any system running a 5.53.001 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.

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5.53.001 EBF 8 XML API Updates

Tax code on quote line object incorrect when set

Reported in 5.53.001 EBF 7

Updated in 5.53.001 EBF 8

Ref: 117538

Symptoms: When setting the tax code on a quote line or calling the "calculatedefaults" function the XML API would set the taxcode to an incorrect code for that product item.

Solution: This problem was caused by one of the objects used internally by the XML API not having been correctly configured to use the new 4 character tax codes.

5.53.001 EBF 7 XML API Updates

No .close.before event on the quote line window

Reported in 5.53.001 EBF 3

Updated in 5.53.001 EBF 7

Ref: 117072

Symptoms: A previous update included in 5.53.001 EBF 2 to disable the adding of quote lines with a 0 quantity has caused the .close.before event on the quoteline window not to be fired.

5.53.001 EBF 6 Updates

Order totals on Access order confirmation popup

Reported in 5.53.001 EBF 4

Updated in 5.53.001 EBF 6

Ref:

Symptoms: Although order totals have been displayed when confirming orders to Access Dimensions since 5.53.001 EBF 4 the values that are being displayed are not correct in some situations.

5.53.001 EBF 5 Updates

Exchequer offline product group pricing – band less discount in foreign currency

Reported in 5.53.001 EBF 3

Updated in 5.53.001 EBF 5

Ref:

Symptoms: When a customer has a product (e.g. 'AA Batteries') which has a group price (e.g. for 'Alkaline Batteries') set to band less discount (e.g. band 'F') where that band is in a foreign currency (e.g. 'Euro'), the price is being calculated as zero.

Solution: The currency of the band price is now being used for the calculation (rather than the home currency or the quote currency) and this now generates the correct price.

5.53.001 EBF 4 Updates

No order totals on Access order confirmation popup

Reported in 5.51.001

Updated in 5.53.001 EBF 4

Ref: 112421

Symptoms: When confirming orders to Access Accounts, the order totals are not being displayed on the order confirm popup.

5.53.001 EBF 3 Updates

No offline special pricing for Exchequer in Rapid Order Entry v3.3

Reported in 5.53.001 EBF 2

Updated in 5.53.001 EBF 3

PID 112038

Symptoms: The updated Exchequer special pricing in 5.52/5.53 was causing Rapid Order Entry 3.3 to either generate errors or not popup at all.

5.53.001 EBF 2 Updates

'Invalid Expression' error in Opera payments import

Reported in 5.53.001 EBF 1

Updated in 5.53.001 EBF 2

Ref:

Symptoms: In some scenarios the update the Opera Payments accounts import was generating an "invalid expression" error.

5.53.001 EBF 1 Enhancements

Inactive stock feature in Access Dimensions

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref:

Access Dimensions v2.44b introduced a feature to support inactive stock and price items. ProspectSoft CRM now imports the inactive stock and price items information during the accounts import process.

Credit limit system option for Access Dimensions & Opera II

Reported in 5.53.000

Updated in 5.53.001 EBF 1

Ref: 112366

The credit limit system option introduced in 5.53.000 for Exchequer is now also being utilised when creating Access and Opera sales ledger accounts through ProspectSoft CRM.

The new system option allows the user to set a value for the credit limit used. The default value is 1. The credit limit option takes any positive value up to around two billion (actual maximum value is 2,147,483,647). If a value bigger than this is entered then a message prompt stating 'Error reading default credit limit from the Options Table. Credit limit set to 0' will be displayed when the account is being created and the new account will then be given a credit limit of 0.

It should be noted for the above case that in most accounting systems a credit limit of 0 indicates unlimited credit rather than none.

Note for Access Dimensions users: This functionality only works for Access Dimensions versions below 2.44a due to a change in the Access API from 2.44a onwards that blocks this functionality.

Extended Exchequer customer reference field when confirming order

Reported in 5.52.000

Updated in 5.53.001 EBF 1

Ref: 53181, 92078, 111876

The customer reference field on the Exchequer order confirmation has been increased in length from 10 to 20 following an increased length in Exchequer v6. Users of previous Exchequer versions where the length is shorter are still able to post only the first ten characters of the customer reference supplied with any extra information being truncated.

5.53.001 EBF 1 Updates

Dormant sales ledger accounts in Opera II

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 105409, 112184

Symptoms: ProspectSoft CRM allows orders to be posted to dormant accounts in Opera II.

Solution: The system now checks and restricts order posting if the sales ledger of the ledger account is dormant.

Orders not written to sales history during order confirmation

Reported in 5.52.000

Updated in 5.53.001 EBF 1

Ref: 111963

Symptoms: Orders that are confirmed into the accounting system are not being automatically written into the sales history table as they were in versions of ProspectSoft CRM prior to 5.52.000. The information only appears in the sales history table after an accounts import has been performed.

Solution: This issue is due to changes that have been made to the quotehdr.temporder field to support more quote status types as required by ProspectSoft CMS e-commerce sites. The 'temporder' field now stores the value '2' for a confirmed order and this caused issues with the copy to sales history function which looked specifically for the value of '0' to determine that the order was not one that was taken offline to be confirmed at a later date.

ProspectSoft CRM has now been updated to ensure that the copy to sales history functionality is compatible with the new possible range of values that can appear in the 'temporder' field. This release retains the previous behaviour that only confirmed orders are copied to sales history (offline confirmed orders still do not get copied to the sales history until they are confirmed online)

Individual due dates on sales history lines

Reported in 5.13.000

Updated in 5.53.001 EBF 1

Ref: 80377

Symptoms: When viewing the sales history tab, some lines show the due date on the quote header instead of the individual due dates as specified on the quote lines.

Solution: This issue is due to the incorrect information being written when ProspectSoft CRM copies information into the sales history table during the order confirmation process. This process has now been updated to ensure that the system uses the correct due dates from the quote lines.

Different due dates splits orders confirmed into Exchequer Enterprise

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 111875

Symptoms: ProspectSoft CRM splits quotes with different due dates into multiple orders as they are confirmed into the Exchequer accounting system even though Exchequer supports orders that have lines with different due dates.

Solution: This has been updated and such orders no longer end up as multiple orders in Exchequer, but use the Exchequer order line due date field.

Quote line screen allowing 0 quantity items

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 98814

Symptoms: If the quote line details window is closed using the 'x' window button during the process of creating a new quote line a prompt appears which allows the user to save the line even if no quantity has yet been entered.

Solution: Clicking the 'x' window button now performs the same functionality as clicking the 'Cancel' button on the window and has no option to save changes.

Confirmed orders factored by 10 in Access Dimensions foreign currency quotes

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 111476

Symptoms: If the price decimals and foreign currency decimals are not the same when posting orders to foreign currency accounts in the Access Dimensions accounting system then the price that is posted to the accounting system is incorrect by a factor of 10.

Wrong Exchequer currency rate on quote line screen product costs

Reported in 5.13.000

Updated in 5.53.001

Ref: 80317

Symptoms: The wrong currency rate is applied when importing product costs from the Exchequer Enterprise accounting system. The daily rate is applied instead of the company rate that has been defined.

Solution: The import now checks for the correct rate in use as set in Exchequer. So regardless of the rate that in is use, the system will adjust to use the correct rate.

Quotation currency when working online to Access Dimensions

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 111282

Symptoms: When creating a foreign currency quotation working online to accounts, the initial price loaded on a quote line is in the currency of the list price for the product instead of being converted to the foreign currency. When working with accounts offline the correct values are retrieved.

Solution: The online behaviour now follows the offline behaviour and the initial price of the quote line is correctly converted to the currency as specified in the quote header.

Confirmed order date to Exchequer UDF4

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 112342

Symptoms: The quotation date is being passed into User Defined Field 4 when confirming an order from ProspectSoft CRM to the Exchequer accounting system. This causes problems for users that are using this field for another purpose.

Solution: The field was used to keep track of the quote date for the order so this can be imported back into ProspectSoft CRM. However this field is no longer used to avoid complications when it is already in use for another purpose and as such is no longer imported into ProspectSoft CRM. The date at which the order was confirmed into Exchequer is still stored in the transaction date field.

Opera payments import paid flag

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Ref: 108824

Symptoms: The Opera payments import only checks the invoice balance being equal to zero and disregards the paid status in Opera when it is evaluating whether an invoice is paid or not.

Solution: The import has now been changed to consider the paid flag in Opera.

Unable to customise order confirmation fields in Access

Reported in 5.51.001

Updated in 5.53.001 EBF 1

Symptoms: 5.50.002 EBF 110 allowed fields in the order confirmation screen to be modified in both Opera and Access. When merging into 5.51.001 only the Opera changes were included.

Solution: This update allows fields in the Access order confirmation screen to also be customised.