

Software Update

ProspectSoft CRM Version 6.00.004 Release Notes

Target Readership

This document is intended for release by anyone currently running a ProspectSoft CRM release earlier than 6.00.004

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 CRM 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 currently running ProspectSoft CRM version 5.52.xxx or 5.53.xxx, are not using Microsoft Windows XP SP2 or higher, are not using Microsoft Office 2003 or higher, use Opera 16, or are running an EBF numbered 1xx or 2xx.

Important Notes

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

- Users currently running ProspectSoft CRM version 5.52.xxx or 5.53.xxx with or without an EBF are **not able** to upgrade to this version. Support for these users upgrading to ProspectSoft CRM 6 will begin in the next released version of ProspectSoft CRM.
- Users upgrading to this version of ProspectSoft CRM that are running a version **prior to 5.51.001** should contact their support team before proceeding with the upgrade.
- Installing on a system that does not currently have version 6.00.xxx installed is likely to require the computer to be restarted. This applies to server machines as well as clients.
- All upgrades to this version should be treated as a major upgrade, including those from a version 6.00.xxx installation.
- The use of ProspectSoft CRM 6 in a terminal services environment is not currently supported. An announcement will be made when terminal services support is made available.
- This version of ProspectSoft CRM has some known issues with connecting to custom ODBC accounts integrations and ProspectSoft CRM Sage accounts integration. As such it is advised that this version not be used if you are using either ODBC or Sage accounts integration. ProspectSoft CRM version 6.01.000 will fully support these types of accounts integration.
- ProspectSoft CRM 6 should work with most XML API applications that were written for version 5, however some compatibility issues may exist in some applications and testing should be done to ensure that everything functions as expected. For more information on the changes to the XML API see later in this document.
- ProspectSoft CRM 6 requires Windows XP Service Pack 2 or higher when using a Windows client operating system or Windows Server 2003 and above when using a Windows Server operating system.
- Microsoft Office 2003 and higher are now the only supported versions of the Microsoft Office suite. Office 2000 and Office XP are no longer supported.
- 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 using the installer to upgrade version 6.00.xxx to 6.00.003 then the install will complete successfully, however the first time you run ProspectSoft CRM the "configuring ProspectSoft CRM 6" message will be displayed. This process should be allowed to complete, at which point you will need to restart your computer. However ProspectSoft CRM should then run as normal.
- Users running version 6.00.xxx that have selected contacts or divisions for synchronisation with Outlook will need to reselect these records after the update to 6.00.003.

Important Notes (continued)

- 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).
- The licensing options for small business CRM systems included with the demonstration profile 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.
- If installing ProspectSoft CRM 6 alongside ProspectSoft CRM 5 and using the demonstration profile, please ensure that you use the version 6 Reset Database wizard to reset the database rather than the version 5 wizard. The version 6 wizard is called "Reset Demo Database" as opposed to "Reset Database" and is in the "ProspectSoft CRM 6 Tools" folder of the Start menu.
- There is now a single install for the live and demonstration versions of ProspectSoft CRM. The live and demonstration databases can be accessed using the profile drop down list on the login screen. For more information please see later in this release notes document.
- Although more than one copy of the ProspectSoft CRM application can be opened at any one time this is not recommended even when connecting to different profiles as it can cause issues with XML API applications and also utilities such as "Save to CRM".

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6.00.004 Enhancements

[More information in "error logging into remote database" message](#)

Updated in 6.00.004

Ref:

If there are any problems when ProspectSoft CRM tries to start replication for a remote database then an "Error logging into remote database" message is displayed. This message has been enhanced in this version to provide more details of exactly what problem has occurred.

6.00.004 Updates

Error upgrading pre-5.51 remote database to 6.00.xxx

Reported in 6.00.003

Updated in 6.00.004

Ref: 117886, 117682

Symptoms: When upgrading a remote ProspectSoft CRM database of a version before 5.51.000 to 6.00.000 or 6.00.003 an error message will be displayed during the upgrade process regarding the creation of a foreign key to the system_image table.

Solution: This error is due to the ProspectSoft CRM update process expecting some data to be in the system_image table that is only added during the 5.51.000 update.

When moving directly from a pre-5.51.000 version to version 6.00.xxx this information does not have a chance to replicate to the mobile users machines and therefore causes a problem.

The 6.00.004 database update ensures that scripts are run prior to the creation of the foreign key that prevent the error and ensure that the remote and consolidated databases are consistent during and after the update.

Server side extraction utility changes

Reported in 6.00.003

Updated in 6.00.004

Ref: 117468

The server side "Remote Configuration and Extraction Utility" has been updated to address various issues. More details on the specific issues addressed are listed below.

Time given to start extract.db

Starting with version 2.1 (included with version 6.00.003 of ProspectSoft CRM), the server side extraction wizard starts extract.db as a separate database process and waits a given time to allow the service enough time to start. On some systems however, especially those performing a large amount of disk operations at the same time as running the extraction, the time that was given was not long enough.

The time given to start the database has now been extended from the previous 16 seconds to 24 seconds which should allow the database to start correctly even if there is a heavy load on the server.

As the server is now paused for a longer period of time while the database is started an animation has been added to the "Starting extract.db" text to prevent the user from thinking that the process has frozen.

Check for FTP settings failed if only replicating servers were configured.

The check added in the server side extraction wizard to check for FTP users and display the FTP configuration information threw an error when there were no remote users and only replicating servers had been configured. This has now been fixed.

Outlook Contact Sync synchronises “Left Company” contacts

Reported in 6.00.003

Updated in 6.00.004

Ref: 117738, 117294

Symptoms: The Outlook Contact Synchronisation application is incorrectly synchronising contacts that have been set to left company status. In some cases a “Left Company” message would be appended to the contact but in some cases this did not happen.

Solution: To prevent confusion the Outlook Contact Synchronisation application no longer synchronises contacts that have been marked as “Left Company”. If any contacts that a user has selected for synchronisation are later set to having left the company then they will be removed when the user next synchronises.

Address data synchronised from Outlook to ProspectSoft CRM is jumbled

Reported in 6.00.003

Updated in 6.00.004

Ref: 117674

Symptoms: If a user modifies the details of a contact in Outlook that is set to synchronise in ProspectSoft CRM then Outlook Contact Sync will update the details in ProspectSoft CRM to match the details in Outlook.

However, in some cases the address details that were synchronised from Outlook to ProspectSoft CRM became jumbled onto one line. Contact addresses were also incorrectly disconnected from their parent division.

Solution: Due to the way that Outlook structures address data it is difficult to ensure a correct synchronisation from Outlook to ProspectSoft CRM. As such the Outlook Contact Sync application will no longer try and synchronise address data that has changed in Microsoft Outlook. If a contact moves address then this change should be made in ProspectSoft CRM, at which point it will be synchronised to Outlook for all users that have selected this contact for synchronisation.

ProspectSoft CRM version 6.00.004 also includes a script that is part of the update process that will reconnect contact addresses to the division parent for all contacts where this problem can be identified. However, there is a chance that some addresses will remain either jumbled or disconnected even after the upgrade. If this is the case then these addresses should be modified manually when they are identified.

6.00.003 Enhancements

Better phone number search

Updated in 6.00.002

Ref: 111637

A new phone number search is now included as an extra search option for contact records.

Extra Database Indexes

Ref: 112443

Updated in 6.00.0002

Extra database indexes have been added to the following fields to enable faster “Quick Searches” within ProspectSoft CRM.

- Document.description
- Inventory.inventorydesc
- Inventory.serialno
- Lead.lead_desc
- Quotehdr.ordernumber

New “Manage Favourites” window

Updated in 6.00.002

Ref: 112495

The “Manage Favourites” window has been updated to ensure that user favourites can be more easily configured. The new window consists of a list of all available menu items on the left of the window that can then be moved to the current favourites list on the right by either dragging and dropping or using the buttons provided.

Outlook Contact Synchronisation

Updated in 6.00.002

Ref: 112234, 112233

A new version of the Outlook Contact Synchronisation application is installed with this version of ProspectSoft CRM. This version includes an updated welcome screen with more information and is designed to use new, more standardised report naming conventions for its internal reports.

Updated Server Side Remote Extraction Utility

Updated in 6.00.002

Ref: 112363

The server side remote configuration and extraction utility has been updated to provide the following new features.

Better handling of log files in the case of an extraction error

Log files were being removed in some cases even when they were still relevant. This issue has now been addressed in the latest version of the Remote Extraction Utility.

An improved process for configuring and executing a delayed extraction

This is particularly useful in the case where users are logged in and you wish to automatically extract the remote database(s) at a time when everyone will have logged out of the system.

Automated checking on the amount of free disk space available when performing an extraction.

The extraction process now requires the following amount of disk space to run.

- For all extractions a minimum of 1.3x the database size is required.
- For server extractions an extra 0.4x the database size is required for each user that is selected for extraction.
- For server extractions a warning will be displayed if there is not the 1.3x database size free plus 1x the server database size for each user that is selected for the extraction. However the user can choose to continue the extraction if they desire.

Changes to ensure that the Extract.db is run in a separate isolated database process.

While this was not causing any problems it is now much clearer to the user when the database used to extract the mobile databases is started and stopped.

Updated Remote Extraction Client Side Utility

Updated in 6.00.002

Ref: 112363

The client side remote extraction utility has been updated to provide better error logging and compatibility with the new folder structures of ProspectSoft CRM version 6. A problem that existed with version 6.00.000 of the utility and caused an error message to be displayed has also been fixed.

Users no longer required to select each log file when setting up a profile for offline use

Updated in 6.00.001

Ref 112465

When setting up a profile for offline use in 6.00.000, the user is asked to select a database and then select all the related log files. If upgrading from 5.x in particular, the user could fail to select ALL the log files and hence cause later replication problems.

In 6.00.002 this has been avoided by automatically selecting all *.log files in the same directory as the selected db file.

Note: If there is more than one .db file in the selected directory then the user is still prompted as the software can't assume that all the log files belong to this database.

Confirmation increment sets were created

Updated in 6.00.001

Ref: 95439

A message has been added to confirm the successful creation of a remote increment set when using the interface opened from Admin-> Increment-> Issue Remote Increment Set.

6.00.003 XML API Enhancements

Window Action to save documents to quotes

Updated in 5.51.001 EBF 102

Ref:

New window action parameters have been added to allow the saving of documents to quotation records without a user interface being displayed. Previously only problems and leads could be saved with this method.

6.00.003 CD Enhancements

[CMD Files to create database service, configure backups and create replication service](#)

Updated in 6.00.003

Ref: 114378

CMD files have been added to the ProspectSoft\Server\Utilities folder that allow the user to create and start the database service, configure backups and create the replication service by simply clicking on each CMD file in turn.

The CMD files are given a numerical order with the following names:

1. Configure Database Service.cmd
2. Configure Backups.cmd
3. Configure Replication Service.cmd

[Server Install and Server Re-install options now automatically select to install server components](#)

Updated in 6.00.003

Ref: 114492

The server install and server re-install options on the CD now have the server components automatically selected in the Installshield wizard.

["Replicate.cmd" and "Force Replicate.cmd" no longer leave the command prompt open](#)

Updated in 6.00.003

Ref: 111805

"Replicate.cmd" and "Force Replicate.cmd" now close the command prompt as soon as they have opened the replication engine. This prevents the command prompt from staying open behind the actual application window for the replication engine.

[ProspectSoft CRM shared folder now shared for "everyone"](#)

Updated in 6.00.003

Ref: 111805

The ProspectSoft CRM shared folder is now specifically given rights for full control for everyone. Note that this change does not apply on installations for the Windows XP operating system where it is not possible to set specific permissions on file shares.

No need to edit "SetDrive.cmd"

Updated in 6.00.003

Ref:

There is now no need to edit the "SetDrive.cmd" file if you are installing the ProspectSoft CRM server components to a drive other than the C: drive. The Server install wizard automatically creates a system environment variable that stores the drive where the server components were installed and this environment variable is used by all other CMD files.

Improved compatibility with Windows Server 2008

Updated in 6.00.003

Ref: 111805

CDs for ProspectSoft CRM version 5.x sometimes had problems when trying to run the CMD files from the server components on Windows Server 2008. These problems have been addressed in the CDs for ProspectSoft CRM version 6.

Database Service Compatibility with 64 bit servers

Updated in 6.00.003

Ref:

The default database service configuration for ProspectSoft CRM 6 no longer includes the SPX network protocol or named pipes communication. Neither communication method was supported by ProspectSoft and the SPX protocol no longer functions on 64 bit editions of Microsoft Windows.

Imported Document/Image document type added to standard database

Updated in 6.00.003

Ref: 86984

A new document type of "Imported Document/Image" has been added to the standard documents included with the default live database. This document type gives a prompt to the user that they should drag the document or image that they wish to import to the document window and is the same document type that is included in the demonstration database.

Windows version checking on server install launcher

Updated in 6.00.003

Ref:

The server install launcher will now check the version of Windows that is being run and will not allow the server components to install if it is not a supported version. Note that the Installshield wizard also checks

for the Windows version but checking before installing the server components prevents users from getting part of the way through the installation before they are warned.

Message box added to warn of server reboot

Updated in 6.00.003

Ref: 114490

The server install launcher will now warn the user that their server is likely to need to be rebooted before it begins the installation of the server components.

Cannot run serversetup.cmd externally

Updated in 6.00.003

Ref:

It is no longer possible to run serversetup.cmd externally due to configuration changes that are made by the server install launcher (serversetup.exe). Users should use ServerSetup.exe for all server installations.

Cosmetic changes

Updated in 6.00.003

Ref: 112230, 112229, 114498

The HTML, images and icons on the CD have been updated to be the new version 6 styles.

6.00.003 Updates

Replication of Outlook Contact Sync tables

Reported in 6.00.002

Updated in 6.00.003

Ref:

Symptoms: The new tables for Outlook Contact Sync are not replicating correctly and not being included when extracting a remote database.

Solution: Scripts are run in the 6.00.003 update to address this issue, however users that were running a previous 6.00.xxx release will need to reselect all of their contacts for synchronisation.

Columns now reset when report changed

Reported in 6.00.002

Updated in 6.00.002 EBF 1

Ref:

Symptoms: If a report is changed to include a new column or to make an invisible column visible then this column is not displayed in the ProspectSoft CRM user interface.

Solution: This issue is due to the way that ProspectSoft CRM 6 now allows users to choose their own column orders and visible / invisible columns. The system previously did not know that the report had been updated and so would simply apply the changes. This had the side effect that if a column was added to a report ProspectSoft CRM would think that the column had been hidden by the user and would not display it (the user could see the column by going to choose visible columns for that report and reselecting it).

To overcome this issue ProspectSoft CRM now stores a copy of all the columns available in the report along with the user settings. If the report being loaded does not have the same columns as the column list that is saved against the user settings then the column customisations for this report are abandoned and the user will need to make their changes again.

This behaviour where customisations are lost will also be seen in the core product from time to time when a standard report is updated.

ProspectSoft CRM 5 XML API not compatible with version 6

Reported in 6.00.002

Updated in 6.00.002 EBF 1

Ref: 114488

Symptoms: The ProspectSoft CRM 6 installer should install the version 6 XML API over the top of the version 5 edition which should allow ProspectSoft CRM to run without problems. However, in some cases the version 5 XML API will still exist on the system and this will cause an error when logging into a system that has XML API plug-ins enabled.

Solution: ProspectSoft CRM will now display a more helpful error message if it detects that this is the case, however the user that is experiencing this issue will still need to do the manual step of repairing the ProspectSoft CRM 6 installation.

Note that this message will not appear if the user does not have the XML API module turned on.

Outlook Contact Sync creates deleted emails

Reported in 6.00.002

Updated in 6.00.002 EBF 1

Ref: 112972

Symptoms: The Outlook Contact Sync application creates unread deleted emails during its use.

Default values not applied on problem and lead details screen

Reported in 6.00.002

Updated in 6.00.002 EBF 1

Ref: 114464

Symptoms: Default values that are configured using the Screen Customiser module are not applying to the problem and lead details screen.

Cannot create mail merge using external HTML file

Reported in 6.00.000

Updated in 6.00.002

Ref: 114111

Symptoms: When trying to create a mail merge using an external HTML file users receive the message "The file selected is not a valid HTML file".

[View currently licensed modules shows error](#)

Reported in 6.00.000

Updated in 6.00.002

Ref: 112704

Symptoms: An error occurs when viewing the currently licensed modules list from the Help - About screen.

[Redundant index on "campaignactivityid" field on "mailmerge" table removed.](#)

Reported in 5.51.001 EBF 1

Updated in 6.00.002

Ref: 105280

Symptoms: The database engine gives a "redundant index warning" for the index "mailmerge_campaignactivityid" when the database is starting.

Solution: This index was redundant and has been removed.

[Two status changes followed by recall on a problem record can cause an error message](#)

Reported in 6.00.000

Updated in 6.00.002

Ref: 112460

Symptoms: Performing a status change on a problem record immediately followed by another status change without closing the recall window can cause an error number 9 to be thrown from ProspectSoft CRM.

[ODBC data sources not created on application first run](#)

Reported in 6.00.000

Updated in 6.00.002

Ref: 64178

Symptoms: When a user first runs the ProspectSoft CRM application it is designed to create user DSNs to allow connect to the ProspectSoft CRM database. However, on some occasions this does not happen.

Solution: An external Sybase EXE was previously being used to create the DSNs which may have had some compatibility problems. ProspectSoft CRM will now create the registry entries required for each DSN.

Account Manager Plug-in not working

Reported in 6.00.000

Updated in 6.00.002

Ref: 114214

Symptoms: When logging into ProspectSoft CRM an error is displayed stating that the account manager plug-in could not be initialised.

Opening and importing Infomaker 9 reports

Reported in 6.00.000

Updated in 6.00.002

Ref: 107672

Symptoms: It is not possible to open or import into the "Report Definitions" admin table those reports that have been created using Infomaker version 9.

Opera itran.id unique id field

Reported in 6.00.000

Updated in 6.00.001

Ref 112505

Symptoms: Changes to the way that ProspectSoft CRM has generated the ID field for the Opera II "itran" table over different versions might cause problems for some users. For those users upgrading from version 6.00.000 to a higher version 6 release a warning is now presented that these issues might exist. Users are instructed to contact support about this issue, however some details are listed below.

The itran.id field should be unique in Opera. This was being set with a decremented negative number. Finding the lowest number to then decrement it was slow. In 5.51.001 EBF 101, this was changed to simply take the ProspectSoft quoteLine.lineid and turn it negative.

However in 6.00.000 this change was not included. This in itself wasn't a major issue, but including it now in 6.00.002 may well be an issue if both methods were used. E.g.

QuoteLine 1234 is converted to Opera in 5.51 creating itran.id = -1234

Then 6.00.000 is installed and the next conversion, say of quoteLine 1211 simply decrements the lowest opera id value, creating line -1235.

If 6.00.002 is then installed and ProspectSoft QuoteLine of 1235 is confirmed, then this will create a duplicate value in Opera.

Solution: If you are affected by this issue then please contact your support team for assistance.

User defined tabs with forms being "selected"

Reported in 6.00.000

Updated in 6.00.001

Ref 112485

Symptoms: If a user defined tab has a form in it, then the row becoming selected causes the whole form to turn blue (or grey). This makes the tab hard to read.

Documents being saved with a primary key of 0 (zero)

Reported in 6.00.000

Updated in 6.00.001

Ref:

Symptoms: With the interface changes in version 6.00.000 it was possible to click the close button on a document without clicking accept. If this was done from a Save to Crm document then the document is saved without assigning a primary key – and hence with a document ID of zero. This document was then displayed in the summary tab of ProspectSoft CRM records.

Remote Replication agent not starting V6

Reported in 6.00.000

Updated in 6.00.001

Ref: 112247

Symptoms: After upgrade to version 6, the replication engine on the mobile user's machine will not start and instead gives an 'Error connecting to database' message.

Guttometer can be set greater than 100

Reported in 6.00.000

Updated in 6.00.001

Ref: 95869

Symptoms: Typing directly into the guttometer field on a lead can be used to set the value over 100.

ToDo icon not present

Reported in 6.00.000

Updated in 6.00.001

Ref: 112554

Symptoms: The icon is not displaying on the "To Do" tab on the tab bar.

Create problem icon available when no Problem Tracker module available

Reported in 6.00.000

Updated in 6.00.001

Ref: 95189

Symptoms: The create new problem button on the toolbar is enabled even when the problem tracker module is not enabled

PS does not remember work offline tick

Reported in 6.00.000

Updated in 6.00.001

Ref: 112467

Symptoms: When logging in to ProspectSoft CRM, the work offline checkbox is always un-ticked regardless of the selection made by the user at the last login.

Create description only quote line

Reported in 6.00.000

Updated in 6.00.001

Ref: 112278

Symptoms: After upgrading to ProspectSoft CRM version 6, there is no way for the user to enter a description only line on a quotation.

Solution: A button has been added to the Product search window on a quote line to allow the user to add a description only line.

Exporting reports from the Report Definitions admin table to infomaker 9 PBL files

Reported in 6.00.000

Updated in 6.00.001

Ref: 112320

Symptoms: It is not possible to export reports to Infomaker 9 PBL files. The dialogue to save the report appears but when it is accepted nothing happens.

Several Selection Lists are not sorted

Updated in 6.00.001

Ref: 95385

Symptoms: Some lists displayed as a result of a search do not have a default sort applied to them.

Solution: All lists displayed as a result of a search in ProspectSoft CRM have been checked to ensure that they have a default sort. The company, inventory, lead and problem lists were updated.

Error after closing Word during mail merge

Reported in 5.50.002

Updated in 5.50.002 EBF 112

Symptoms: When running a Word mail merge with certain HTML documents ProspectSoft CRM will display an error after Microsoft Word is closed. The mail merge is sent successfully, however any changes to the mail merge document and records of who it was sent to will not be saved.