Sage CRM

Version 7.0 Patch Release Notes

Overview

This document provides details of all Sage CRM patch releases for version 7.0. Installing the most recent 7.0 patch (C) ensures that you get all of the fixes included in earlier patches (if applicable).

Prerequisites

You need to have Sage CRM 7.0 SP1 installed before you install the latest patch. You can find out the version of Sage CRM you are running from the Logon page, which would read ‘CRM version 7.0, for example.

Latest Version

Latest Release: Version 7.0

Dll: 7.0.0.4

How to Install Sage CRM Patches

Use the following procedure to install the latest Sage CRM patch:

1. Back up the existing CRM eWare.dll and database. The DLL is stored in the CRM installation directory, which is commonly in …\Program Files\Sage\CRM\<Installation Name>\WWWRoot
2. Run the Setup.exe file .
3. When using the InstallShield wizard, you can choose to use either Windows authentication (using the credentials of the user logged in to the system at that time) or SQL Server authentication (by entering the appropriate SQL Login ID and Password).

Patch C

Released	October 4th 2010	
Files included	DLL version	7.0.0.4
	Outlook plugin	7.0.0.4
	Document plugin	7.0.0.3
	CTI plugin	7.0.0.3
Software Support Matrix	https://community.sagecrm.com/user_community/m/sage_crm_v70_documentation/3651.aspx	

Microsoft Outlook 2010

MS Outlook 2010 has introduced many changes for Outlook users. One such change is that web browser support has been dropped from within the Outlook 2010 client itself. Details of these changes can be found here:

http://technet.microsoft.com/en-us/library/cc179110.aspx

The following excerpt has been extracted from the above URL:

Web browser support

Web browser support is removed in Outlook 2010. The following related features have also been removed.

- View Web pages from within Outlook
- Save as Web Page option for Calendar
- Search the Internet from within Outlook
- Navigate to Web pages within Outlook

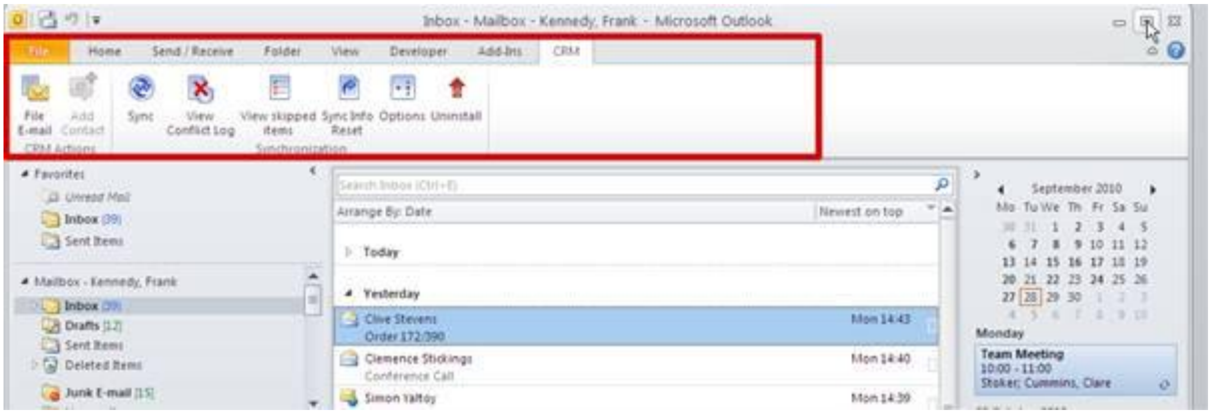
As you may already know, the classic Sage CRM Outlook Integration solution relies upon MS Outlook's ability to navigate and view web pages from within Outlook in order to browse Sage CRM, add Contacts and file e-mails.

As a result of the changes outlined above, MS Outlook 2010 no longer renders web pages reliably using Internet Explorer and, as a result, the base CRM Outlook Integration functionality can no longer be provided via an embedded screen from within the Outlook 2010 client itself.

To overcome this obstacle, we have designed an alternative Outlook Plug-in which is fully compatible with MS Outlook 2010 and which we believe offers the user an intuitive and integrated Sage CRM experience despite the web page rendering limitations of Outlook 2010. This new plug-in is described in detail below.

Sage CRM 7.0 C Plug-in for MS Outlook 2010

The new Sage CRM 7.0C Outlook 2010 Plug-in features a new CRM ribbon which has been incorporated into the Outlook 2010 “ribbon” user interface. This replaces the old CRM Toolbar and Tools> CRM top menu.



From this new CRM ribbon – it is possible to do the following:

- File E-mails and Add Contacts to Sage CRM (as was possible via the CRM Toolbar in previous versions of the Outlook Plug-in).
- Perform a Sync with Sage CRM (as was possible via the CRM Toolbar in previous versions of the Outlook Plug-in).
- View Conflict Logs, view Skipped Items, perform a Sync Info Reset, specify Plug-in Options and Uninstall the Plug-in (all of which were possible via the **Outlook Tools** | **CRM** top-menu in previous versions of the Outlook Plug-in).

Some key points to note about the 7.0 C Outlook 2010 Plug-in are:

- File E-mail and Add Contact are essentially the same features as were present in previous versions of the Outlook Plug-in. However, because Outlook 2010 no longer reliably supports web browsing via Internet Explorer, we can no longer present the File E-mail and Add Contact screens as embedded screens within the Outlook client. Instead, the File E-mail and Add Contact screens appear in pop-up windows.
- From a Sync perspective, there has been no change to any of the Synchronization actions (Sync, View Conflict Log, View Skipped Items, Sync Info Reset, Options and Uninstall) other than that they now appear as buttons on the new CRM ribbon.
- Because Outlook 2010 no longer reliably renders web pages using Internet Explorer, it is no longer possible to browse to or navigate around Sage CRM from within the Outlook 2010 client itself and therefore the old CRM navigation folders and CRM toolbar button have been removed from the 7.0C Outlook 2010 Plug-in.
- Sage CRM is no longer embedded as a web application within the Outlook 2010 client.
- The **View Contact** button has been removed from the plug-in and is not available from the new CRM ribbon.

- It is still possible to send an e-mail composed in Outlook 2010 and automatically file it in Sage CRM and attach a shared CRM document to an Outlook email as was previously possible via the **Send and File** and **Attach Shared Doc** buttons in previous versions of the Outlook Plug-in.

Note: The changes to the Sage CRM 7.0c Outlook Plug-in described above apply only to the Outlook Plug-in when used with Outlook 2010.

Sage CRM will continue to support the Outlook Integration feature with Outlook 2003 and Outlook 2007 in 7.0c and as such it should be noted that there are no changes to the 7.0c Plug-in for Outlook 2003/2007.

Outlook 2010 Video

A video outlining the main differences in the Outlook 2010 plug-in can be downloaded from the following link:

https://community.sagecrm.com/user_community/m/additional_documentation/7032/download.aspx

Outlook Plug-in on Windows 7 and Windows Vista

The Outlook plug-in installation and setup folders are hidden by default on Windows 7 and Windows Vista client machines.

To work around, make sure the Show hidden files option is enabled (In Windows Explorer, go to Tools | Folder Options and click the View tab).

On Windows 7 and Vista client machines, the Outlook plug-in installation and setup logs are located here:

..\Users\<username>\AppData\Local\Temp\

The standard error log is located here:

..\Users\<username>\AppData\Roaming\ACCPAC\CRM\OutlookPlugin\

And the Outlook plug-in special plug-in “errorsnd.svclog” log file is located here:

..\Users\<username>\AppData\Roaming\Sage\CRM\OutlookPlugin

Note: This file only gets created after you open Outlook for the first time after you have installed the plug-in.

7.0c Known Issues

Ref ID	Area	Description	Status
475-120385	Outlook Integration	The Close button on the Person Entry screen is acting like a Cancel button and returning users to the previous screen.	Known issue with Outlook 2010.
475-120568	Outlook Integration	A new contact is duplicated in Outlook after adding Company details.	Known issue with Outlook 2010.
475-120572	Outlook Integration	A new contact is successfully added to CRM but is not being updated as a CRM Contact in Outlook.	Known issue with Outlook 2010.
332-120574	Outlook Integration	Office 2003 users are being prompted to download .Net 4.0 Client	Known issue.
475-120801	Outlook Integration	There are some navigation issues with the File E-mail function - when clicking the Opportunity link on the E-mail In screen, users are brought to the Opportunity Summary page where they can perform workflow actions, change the opportunity and navigate to other areas in CRM. It is behaving incorrectly when users select Company or Person also - they are directed to the Company or Person summary screen and told that the company or person has been successfully added as a contact	Known issue with Outlook 2010.
332-119669	Outlook Integration	The error message "This program might not have installed correctly" is displayed on screen after installing the Outlook plug-in on Outlook 2010.	Known issue with Outlook 2010. **Note**: The plugin will work as expected if you select "This program installed correctly".

Ref ID	Area	Description	Status
475-119819	Outlook Integration	After adding a contact with a company and triggering a dedupe in CRM, then selecting Add Contact from the CRM Ribbon and selecting the existing company from the Potential Duplicate Company screen, the user is brought to the Person Entry Screen and the Company For SSA field has the Company filled in. However, the company name is not matched or hyperlinked.	Known issue with Outlook 2010.
475-120384	Outlook Integration	The new e-mail icon is missing when users Select the File E-mail button and select File and View E-mail in the pop up window.	Known issue with Outlook 2010.
475-120489	Outlook Integration	The Close button is missing from the Potential Person Duplicate screen.	Known issue with Outlook 2010.
475-120490	Outlook Integration	The error message "Operation has failed - CRM Outlook Plugin encountered a problem during the operation. Please try again." appears after the CRM user session times out – but there is no indication that the problem is because of the timeout.	Known issue with Outlook 2010.

Patch C Issues List

Ref ID	Area	Description	Status
0-99308-QA	CTI	CTI stopped working when the user language was switched to French.	This issue is fixed.
0-103296-QA	Address Sharing	After creating additional address fields in the Address secondary entity with 40 characters each and adding the new address fields to the AddressBoxLong screen, the addresses are not copied.	This issue is fixed. Internet Explorer allows only 2083 characters in HREFs, so everything is now in a javascript function, and the HREF is called from that instead.
0-100260-QA	Comms/Diary	The calendar was displaying the wrong days for November on a system that had the Automatically Adjust Clock For Daylight Saving Changes option selected.	This issue is fixed. A new Boolean parameter has been added as a hidden local variable to SetFromDateTime, TimeZoneDelta, and GetRealTimeZoneDeltaForDate. The variable, which is always set to True except when calling setMonthStart, specifies whether to take daylight saving hours into consideration.
0-106614-QA	Comms/Diary	After adding a new appointment and hovering over the appointment while in Calendar view, the Person info was missing. The hover over functionality was working as expected for Tasks.	This issue is fixed.
0-114039-QA	Companies / People	When merging companies that had opportunities or cases that the user did not have edit rights to, it was possible to merge the companies but other associated records were not updated with the merged company ID. As a result, those records were orphaned and still linked to the original (deleted) company.	This issue is fixed.
372-104929-QA	Companies / People	The caption for Azerbaijan was spelled incorrectly.	This issue is fixed.
0-107109-QA	Companies / People	Communications and Opportunities were ordered by the most recent on the Quick Look tab, but cases were not.	This issue is fixed.

Ref ID	Area	Description	Status
0-113286-QA	Companies / People	It was not possible to delete communications created from Groups that were linked to a person with no company.	This has been logged as an enhancement request.
0-102928-QA	Core Product	After editing the selection list for the Profile Name field in the Users secondary entity and clicking Cancel instead of saving changes, then going back in to try to edit the selection list, the list was deleted. However, performing a metadata refresh brought the list back.	This issue could not be reproduced.
0-116236-QA	Customization	It was not possible to reorder the Quick Look tab Communications list.	This issue is fixed.
0-107224-QA	Customization	An error occurred for a user who had a multiline text field arranged as the first column in a List/Grid screen.	This issue is fixed.
0-103843-QA	Customization	Long company names were causing line breaks in the Company blocks on the Relationships tab.	This is by design. The Company blocks are a fixed width.
210-60780	Customization	A memory leak occurred in w3wp.exe or inetinfo.exe when clicking any of the non-integrated tabs or any of the Accpac integrated tabs in a CRM 6.1/Accpac 5.5 integration.	This issue is fixed.
0-104491-QA	Customization	The CreateScript DefaultValue = new Date(); did not work after creating a date-time field on an entity and adding it to the entity details screen.	This issue is by design. The DefaultValue is a string and when the user adds the DefaultValue = new Date(); CreateScript, it automatically converts the date to a string that probably will not be in the format expected by CRM. An extra log has been added to CRM if the default value is not in the correct format. Please also note that the field default takes priority over the DefaultValue. The user format can be added to a script using the function currentUser.userpref_dateformat.

Ref ID	Area	Description	Status
0-107329-QA	Customization	The default setting in the field properties was not working for a number of phone and e-mail fields on Company and Person as expected.	This is by design. The issue here is these fields are not used on the screen where the user thought they were used. For example, comp_phoneareacode is not the area code on the new company screen. So if the user adds a default value for comp_phoneareacode and then adds this field to the company entry screen, it will work as expected.
0-107075-QA	Customization	An SQL error occurred when adding a contact to CRM from Outlook	This issue is fixed.
0-105229-QA	Customization	A date or date/time field was set to read-only for some users in the CreateScript box of the companyboxlong. When these users updated a company, they could see previous dates entered but could not amend them. Upon pressing Save, however, the date was removed.	This issue is fixed.
0-107082-QA	Customization	An SQL condition to hide the Notes tab in a quote did not work as expected.	This issue is fixed.
0-94118-QA	Customization	The history for custom entities created with the Main Entity Wizard in 6.2 was behaving incorrectly when using the Continue button.	This issue is fixed.
0-117213-QA	Customization	The external table lists did not appear under the list tab when the caption name and table name were different when creating a new external table.	This issue is fixed.
0-103251-QA	Customization Wizard	An error occurred after dynamically adding a numeric field to a screen.	This issue is fixed.
0-114982-QA	Customization Wizard	An error occurred when trying to create a new entity using the Main Entity Wizard.	This issue is fixed.

Ref ID	Area	Description	Status
0-103629-QA	Dashboard	An error occurred when trying to add a new list block with the Use Group "userlist" to a dashboard.	This is by design. The userlist, emaillist, fileitlist, and workflowlist options should not be available in the Use Group drop-down list and have been removed.
0-104528-QA	Dashboard	An error occurred when trying to add saved search summaries to a dashboard.	This issue could not be reproduced.
0-106335-QA	Data Upload	The selected order of multiple contacts was not retained in a new Company data upload even though the Select Existing Mapping option was selected.	This issue is fixed.
0-118593-QA	Data Upload	Comma separated values in a CSV data upload file were being imported into Sage CRM as separate columns.	This issue is fixed.
0-99761-QA	Data Upload	A data upload failed when the comp_revenue field was removed and the Make A Group option was selected.	This issue is fixed. When a group is created during a data upload, a fixed list of fields is used. Now a check is performed first to see whether those fields exist in the view.
0-106236-QA	Database	An error message occurred when trying to open a communication on an integrated system.	This issue is fixed.
0-105978-QA	Database	It was not possible to connect to the database when trying to connect using the SQL-Server option from the Database Driver drop-down list.	This issue is fixed.
0-103726-QA	Document Plugin	It was not possible to create translations using the caption family as template names.	This issue is fixed.
0-81832-QA	Document Plugin	The product code and name on a quote template merge were garbled when they contained Chinese characters.	This issue is fixed.
0-89844-QA	Document Plugin	Filed e-mail had corrupt date format (01/01/4501).	This issue is fixed.

Ref ID	Area	Description	Status
0-99034-QA	Document Plugin	An error occurred when saving a drag-and-dropped e-mail with a very long subject name.	This issue is closed. A new message has been created, which will be displayed in CRM, warning the user to reduce the file name length (to 150 or shorter) in order to save the file.
0-114734-QA	Document Plugin	When Word 2007 was set to save documents as .doc instead of the default .docx format, mail merge documents created in CRM were being saved as .docx files and were producing errors in Word when attempting to open them.	This issue is fixed.
0-104203-QA	Document Plugin	When using the Export To File function in Advanced Find, CRM created a communication (To Do task) for each of the companies.	This is by design.
0-104680-QA	E-mail Client	The Sent Date fields were not available on the Send Mass E-mail screen.	This issue could not be reproduced.
0-103784-QA	E-mail Client	When sending a second e-mail containing an inline image and using the same template, the filename for the image in the second mail was changed and the image did not display.	This issue is fixed. All attachments will be cleared when a new template is selected.
0-105492-QA	E-mail Client	It was not possible to upload an inline image with a filename staring with the letters "do" to an e-mail template.	This issue is fixed.
0-111703-QA	E-mail Client	Some outgoing e-mails were being sent with the body text replaced with the word "null".	This issue is fixed.
0-96224-QA	E-mail Manager	SQL error when running E-mail Manager.	This issue could not be reproduced.
0-117175-QA	Find / Advanced Find	A wrong SQL Statement was being generated by the Advanced Find functionality.	This issue is fixed.
0-103512-QA	Find / Advanced Find	An SQL error occurred when attempting a mass update from an Advanced Find.	This issue is fixed.
0-99747-QA	Find / Advanced Find	When an Advanced Find search was performed on a multi-select field where the field's code was identical, the search returned the wrong results.	This issue is fixed.

Ref ID	Area	Description	Status
0-97808-QA	Groups / Target Lists	When an admin user created a new task against a Person group and changed the User field under scheduling details to another user, the saved task did not appear in the calendar of the newly selected user, although the tasks did appear in the Team CRM calendar.	This is by design.
0-103679-QA	Hosting	Lead selection list values were not being correctly uploaded.	This issue is fixed.
0-115098-QA	Install / Upgrade	Lists from a secondary entity were not available after upgrading from version 6.2 to Version 7.0/7.0SP1.	This issue is fixed. During the upgrade to 7.0, an extra column is added to the custom_screenObjects table called the Foreign Key ID (FKID). This column is populated with the ID from custom_tables for the bord-name that corresponds with cobj_entityname of each record in custom_screenobjects. The problem with this is that in 6.2, the bord_name column did not have to be unique, and sometimes the bord_caption might differ from the bord_name. For example, when adding a table from an external database (secondary entity) a discrepancy would arise because the bord_caption would be saved to the cobj_entityname field, which then would not be found by the upgrade scripts. Another check has been added to search the bord_caption column in custom_tables before assigning the FKID to undefined.
0-111769-QA	Interactive Dashboard	A newly created appointment did not appear in the calendar view of a Calendar Gadget on the Interactive Dashboard after the timezone was changed.	This issue could not be reproduced.

Ref ID	Area	Description	Status
0-105771-QA	Key Attribute Data	A user with only View access to the company entity was able to change the key attribute record.	This issue is fixed.
0-106246-QA	Leads	The banner saying there was a possible match for a company was not being displayed in a lead.	This issue is fixed.
0-106758-QA	Leads	The lead_updateddate field was being updated with the current date and time.	This is by design. The lead updated date changes because the lead_companymatch column changes every time a lead is searched by company.
0-113859-QA	Library and Templates	It was not possible to sort on multiline text fields either by using substring or cast.	This issue is fixed.
255-115917-QA	Multi Server	Some load balancing problems were encountered when trying to set up a multi-server CRM environment.	This issue is fixed.
0-105371-QA	Navigation	After reading an e-mail on the Communications tab then clicking the Back button, the user was returned to the Company summary screen rather than the list of communications.	This is by design.
0-107718-QA	Notification	The Escalation Service was not picking up a SQL Trigger for Rules.	This issue is fixed.
0-104385-QA	Opportunities	When a task was added to an opportunity that was assigned to user A but then re-assigned to user B, the task picked up user A not user B as was expected.	This issue could not be reproduced.
0-104571-QA	Opportunities	Searching for all opportunities with the Opportunity Currency as the search criteria did not return all records as expected.	This issue is fixed.
0-117193-QA	Quotes / Orders	An error occurred when opening the Quote summary screen for any quote.	This issue is fixed.
0-110284-QA	Quotes / Orders	An SQL error occurred when searching for a product in the context of a quote.	This issue could not be reproduced.
0-107175-QA	Quotes / Orders	The team listed for a quote was not defaulting to the User Channel ID.	This issue is fixed.

Ref ID	Area	Description	Status
0-111373-QA	Quotes / Orders	It was not possible to progress past the Company summary screen after selecting a different company in the webpicker of a newly created quote.	This issue is fixed.
0-101151-QA	Reports	It was not possible to add a person's mobile Full Number to the Person summary report.	This issue is fixed.
0-107163-QA	Reports	When running a CSV report that included a multiline text field that contained a lot of text, the text cut off after 255 characters. Also, text fields that contained any line breaks appeared in the CSV file as a new row.	This issue is fixed. **Note**: Pure CSV will continue to contain line breaks, whereas Excel CSV will not.
0-108684-QA	Reports	Whenever a Date/Time or a Numeric Field was marked as left-justified in a report, the columns created were not aligned when doing an export to Excel.	This issue is fixed.
0-71992-QA	Reports	The Sum function was not available on an expression created in a report based on a newly created view.	This issue is now fixed.
0-115996-QA	Reports	An error occurred when trying to generate a report containing a simple view with a calculated field.	This issue is fixed.
0-105396-QA	Security Management	Security profiles were not working as expected for communications for a user with view/edit Assigned To rights, view/edit Created By rights, and Edit/Insert Users Home Territory rights.	This issue is fixed.
0-107958-QA	Security Management	A user who did not have delete permissions for communications was able to use the Merge Person functionality as a loophole to delete communication records.	This has been logged as an enhancement request.
0-103012-QA	Solo	After creating a Button Group and setting the value "Only For Online Use", the buttons appeared under My CRM | Calendar on the Solo Client.	This issue is fixed.

Ref ID	Area	Description	Status
0-103732-QA	Timings	The first week of 2010 in CRM was set as the week from 2009/12/28 to 2010/01/03, however the ISO 8601 norm is to have the first week of the year as the first week with a Thursday.	This issue is fixed.
0-113511-QA	Timings	After selecting a default SLA, and then creating a case for a company that does not have a specified SLA, the SLA was not automatically set on the Case record.	This issue is fixed. If a default SLA is set, the SLA field will be automatically set with the default SLA when creating new company. This will be the same for cases except when the parent company has an SLA set. Also, please note that if the SLA is changed on the company record, existing child case SLAs should not change. The new or changed SLA will only be applied to newly created cases.
0-103478-QA	Timings	When the Use AM/PM option was set to Yes in a French install, the time was shown in 24-hour format.	This issue is fixed.
426-103805-QA	Translation (English prod)	After changing the user language to German and navigating to a quote or an order, some of the translations were still in English.	This is by design. English versions do not have a full set of foreign language captions. To get a full set of localized captions, you must use a localized version of the product or install a language pack.
0-102215-QA	User Management	When attempting to change a disabled user to a resource, the user was informed that they had reached their maximum number of licenses, but it was still possible to create resource users from scratch.	This issue is now fixed.
0-105250-QA	Workflow	An error occurred when trying to set up a new notification in the Cases entity by using #case_primarypersonid# in the To field of a new e-mail notification.	This is by design. The #case_primarypersonid# hash field will always translate as the person name. If you want to get a person's e-mail address, you must use #pers_emailaddress#.

Ref ID	Area	Description	Status
0-104450-QA	Workflow	A user could not create a case until they were given Edit rights.	This issue is fixed.
0-116050-QA	Workflow	It was not possible to create a new workflow rule using the quotes or orders tables.	This is by design. The hidden custom sysparam AllowWorkflowForQA was introduced in older versions to allow users to base workflow on quotes or orders tables if set to Yes to facilitate users who already had a workflow set up for quotes and order. However, as this is not supported behavior, the tables are now explicitly hidden from the drop-down list.
0-102511-QA	Workflow	The workflow button did not appear for a newly created custom entity.	This issue is fixed.
255-113576-QA	Workflow	After creating a custom entity using the Main Entity Wizard and adding some workflow rules, the Progress Note field was not available on the workflow and it was not possible to add any tracking notes.	This issue is fixed.
0-101812-QA	Workflow	The workflow action rule was not working with the default territory value from the selection list to match the Java script condition defined in the workflow rule.	This issue is fixed. Now if you use a territory field in the javascript condition, it will get the actual territory value from the query, instead of the <default> value from the content fields.

Ref ID	Area	Description	Status
0-113718-QA	Workflow	Creating a case from within a workflow action did not create a second workflow instance entry in the workflow instance table for the new case.	This issue is fixed. A new record is not created in a workflow unless the new record is the same entity as the workflow that activated it, in which case it is placed in the same workflow. So if you have a New Case action on a Case workflow then the new case is placed into the case workflow at the same stage as the case record from which the action was activated. However this was not working as expected - it was pointing both cases at the same workflow instance, so if you changed the state on one of them, they both would change. This has been fixed to create a new workflow instance for the new case and use that so the two cases can be progressed independently.
0-103811-QA	Workflow	The German translation of a workflow rule was displaying in English.	This is by design. Captions are not updated if the WkRl_Caption is changed. WkRl_Caption is a caption code.
0-111621-QA	Workflow	While working through a case list using a workflow rule containing a Create Task action, then clicking the Next button to move to the next case, the Company and Person details were populated with the details from the previous case rather than those of the current case.	This issue is fixed.

Rolled Up fixes

The following 6.2h fixes have been rolled up to this patch. Please refer to the 6.2 Patch Release Notes for more information.

Ref ID	Area
0-114419-QA	Comms/Diary
0-114881-QA	Comms/Diary
0-105799-QA	Customization
0-112044-QA	Document Plugin
255-115575-QA	Internationalization
372-118826-QA	Outlook Integration
0-105499-QA	Quotes / Orders
0-114740-QA	Security Management

The following 6.1r fixes have been rolled up to this patch. Please refer to the 6.1 Patch Release Notes for more information.

Ref ID	Area
0-101799-QA	Customization
0-113694-QA	Performance / Scalability
0-111026-QA	Performance / Scalability