



Sage CRM

Version 7.1 Patch Release Notes

Overview

This document provides details of all Sage CRM patch releases for version 7.1. Installing the most recent 7.1 patch (D Hotfix 1) ensures that you get all of the fixes included in earlier patches (if applicable). The 7.1d hotfix patch has replaced the original 7.1d patch released on December 16th, 2011, and we recommend that this new, enhanced version be installed.

Prerequisites

You need to have Sage CRM 7.1 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 7.1, for example.

Latest Version

Latest Release: Version 7.1

DLL: 7.1.0.5

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 D Hotfix 1

Released January 10th 2012

Files included

| | |
|-----------------|---------|
| DLL version | 7.1.0.5 |
| Outlook plugin | 7.1.0.2 |
| Document plugin | 7.1.0.2 |
| CTI plugin | 7.1.0.1 |

Patch D Hotfix 1 Issues List

| Ref ID | Area | Description | Status |
|------------|-----------------------|---|-------------------------------|
| 506-143183 | Customization | Soft deleted metadata items reappearing after upgrade to 7.1d. | This issue has been resolved. |
| 537-143106 | Interactive Dashboard | Setting My Preferences to go to Company Summary tab prevents Uses from opening the Interactive Dashboard. | This issue has been resolved. |
| 0-142478 | Soap Quotes / Orders | Address not shown by default on web quote. | This issue has been resolved. |

Patch D

Released December 16th 2011

Files included

| | |
|-----------------|---------|
| DLL version | 7.1.0.5 |
| Outlook plugin | 7.1.0.2 |
| Document plugin | 7.1.0.2 |
| CTI plugin | 7.1.0.1 |

Note: The message “This issue could not be reproduced” in the Status column means the issue could not be reproduced on the latest version and patch. An upgrade to the latest version and patch should resolve the issue.

GCRM Contract Proxy Settings

A new checkbox is now available on the Proxy Settings screen at **Administration | System | Proxy Settings**. The GCRM Sync Engine Requires Proxy check box should be selected if it is necessary for the GCRM sync engine to use proxy settings.

Patch D Issues List

| Ref ID | Area | Description | Status |
|-------------|---------------------|---|-------------------------------------|
| 0-94772-QA | Campaign Management | Wave activity from deleted wave activity autofilling in new Internal Telesales Wave Activity added using the Create Group button. | This issue could not be reproduced. |
| 0-134235-QA | Comms/Diary | User details on sent e-mail not being stored intermittently. | This issue could not be reproduced. |
| 0-131000-QA | Comms/Diary | It was not possible to revert back to the standard behaviour of the comm_status field for communications generated as a result of mail merges, once the comm_status default value had been changed. | This issue is fixed. |
| 0-131060-QA | Comms/Diary | AM/PM were in the wrong order when creating a new task/appointment, if AM/PM enabled in My CRM Preferences. | This issue is fixed. |
| 0-131120-QA | Comms/Diary | User time zone was showing a day behind when server and user time zones were changed in a particular way. | This issue is fixed. |

| Ref ID | Area | Description | Status |
|-------------|---------------|---|---|
| 0-131225-QA | Configuration | A communication was visible in the company Communication tab, but not under the account Communication tab. | This is by design. An account was not selected when the communication was created. There is a possibility that a company will have multiple accounts, so communications are not linked to the account by default unless they is added to the communication screen and explicitly specified. |
| 0-127492-QA | Core Product | Company tabs not displaying correctly after tabs updated from Ellipses show/hide tab feature. | This issue could not be reproduced. |
| 0-128263-QA | Core Product | On a German install with the language set to British English, the column names on a newly added SData gadget displayed in German. | This issue is fixed. |
| 0-141312-QA | Core Product | Views script field (Administration Customization [entity] Views) displaying with width of 20. | This issue is fixed. |
| 0-132624-QA | CTI | Phone numbers entered into a custom CTI screen were not displayed correctly, and calls could not be made. | This issue is fixed. |
| 0-132618-QA | CTI | CTI matched a phone number to a company with no person record (when the default CTI screen was the Person Summary screen). When the company record was then selected, an error was displayed. | This issue is fixed. The company record is still displayed as a phone number match, but without a link. |
| 0-134017-QA | Customization | The Component Manager was not available. | This is by design. The license key the customer was using did not have EIS. |
| 0-131543-QA | Customization | Using the shortcut, C: 13, in the SQL field to customize a system menu, gave an error message. | This issue is closed. The codes (and values) are intended to be isolated, not embedded in a full SQL statement. |

| Ref ID | Area | Description | Status |
|-------------|---------------------|--|--|
| 0-132424-QA | Customization | An error was generated when an address field was added to a company Top Content screen. | This issue is fixed. |
| 0-136367-QA | Customization | Continue button on an Order using runblock was displaying a blank screen. | This issue is fixed. |
| 0-141551-QA | Customization | .NET class SearchPage was causing an error on the Find button. | This issue is fixed. |
| 0-126319-QA | Customization | The wrong icon was displayed in the Top Content area for a newly created custom entity. | This issue is fixed. |
| 0-111256-QA | Customization | Error from a custom entity with a prefix greater than 4. | This issue is fixed. Validation has been added to the Advanced Customization Wizard to allow a maximum of 4 characters in the prefix. |
| 0-134191-QA | Dashboard | Not able to view saved search for Orders on classic dashboard unless user is System Admin. | This issue could not be reproduced. |
| 0-141005-QA | Dashboard | A user with the "Restrict Sensitive Info" security setting set to "Must be on Company Team" was still seeing the Company Dashboard. | This issue is fixed. Now, if a user has this security setting, and they are neither on the company team nor the account manager, then they are redirected to the Company Summary page. |
| 0-130908-QA | Dashboard (Classic) | When the sort order of the company list was changed, it was not possible to sort the My Companies list on the Classic Dashboard by the new sort order. | This is by design. |
| 0-131251-QA | Dashboard (Classic) | Customized list block for orders was not available to non-admin users on the Classic Dashboard. | This issue could not be reproduced. |
| 0-132744-QA | Dashboard (Classic) | Error on classic dashboard for a chart displaying data from an external table. | This issue is fixed. |

| Ref ID | Area | Description | Status |
|-------------|----------------------|--|---|
| 0-140790-QA | Data Upload | Accounts not created during Company upload (Sage 200). | This issue is fixed. |
| 0-140971-QA | Data Upload | Duplicate person records were created when uploading company data. | This issue could not be reproduced. |
| 0-126471-QA | Database | An opportunity deleted by one user was still appearing in the recent list of another user. | This issue is fixed. |
| 0-129790-QA | Documentation | Relationships were not merged as part of a person merge. | This issue is fixed. |
| 0-124846-QA | E-mail Client | Warning banner displayed, then blanked out body of e-mail when replying to an e-mail where the To: address was not in CRM. | This issue could not be reproduced. |
| 0-137118-QA | E-mail Client | Spell checker text showing German (application server in Germany), even though user's language in UK English. | This issue is closed. Workaround: in jspell.js LangCountryJSpellMap Array[1] = "UK=US"; |
| 0-127171-QA | E-mail Client | E-mail template on custom entity was not picking up context information. | This issue is fixed. |
| 0-127987-QA | E-mail Client | A resized inline image inserted into an e-mail was sent at the original size when the e-mail was sent. | This issue is fixed for e-mail templates. There is still an issue with new e-mails. |
| 0-141501-QA | Exchange Integration | German version of System Admin Guide showed Resource type uses selected for synchronization. | This issue is fixed. |
| 0-120770-QA | Export Data | An SQL error occurred when exporting a company list (in an integrated Accpac system), when the data included companies with and without "term code" entries. | This issue is fixed. |
| 0-127008-QA | Find / Advanced Find | An error occurred when trying to perform a mass update on a group created using an Advanced Find. | This issue is fixed. |
| 0-141137-QA | Find / Advanced Find | Error when searching for an account after an ERP system was deleted. | This issue is fixed. |
| 0-93635-QA | Firefox | User select field not working in Firefox on Sage CRM 6.2a. | This issue could not be reproduced. Note: IE is currently the only supported browser. |

| Ref ID | Area | Description | Status |
|-------------|------------------|--|-------------------------------------|
| 0-141734-QA | GCRM Integration | Actual and Entered Price were missing from pricing service. | See duplicate issue 0-141886-QA. |
| 0-141737-QA | GCRM Integration | The quoted price was not automatically filled with the list price from CRM. | This is by design. |
| 0-141930-QA | GCRM Integration | vUserIdentifierForIntegration was being overwritten on install. | This is by design. |
| 0-141944-QA | GCRM Integration | Discount total was not displaying as expected. | This issue could not be reproduced. |
| 0-141855-QA | GCRM Integration | Person phone numbers were not synced to ERP. | This issue could not be reproduced. |
| 0-141688-QA | GCRM Integration | vSummaryAccount was removed after schema import and sync. | This issue is fixed. |
| 0-141689-QA | GCRM Integration | Table Level Scripts were not working during synchronization. | This issue is fixed. |
| 0-141730-QA | GCRM Integration | An SQL error was generated after creating an order. | This issue is fixed. |
| 0-141811-QA | GCRM Integration | The Schema import failed when the following commodities fields were supported: sellingUnitOfMeasure unitOfMeasure buyingUnitOfMeasure packingUnitOfMeasure sellingUnitOfMeasureNumber buyingUnitOfMeasureNumber packingUnitOfMeasureNumber. | This issue is fixed. |
| 0-141845-QA | GCRM Integration | Phone number where the type was "modem" was not being displayed on the Account screen. | This issue is fixed. |
| 0-141852-QA | GCRM Integration | Phone number record was duplicated on account when adding a phone number to a person belonging to that account. | This issue is fixed. |
| 0-141881-QA | GCRM Integration | An error occurred after creating an integration and trying to edit an existing account. | This issue is fixed. |
| 0-141919-QA | GCRM Integration | Products were not filtering by product family ID. | This issue is fixed. |
| 0-142263-QA | GCRM Integration | Duplicate fields were not being processed correctly. | This issue is fixed. |

| Ref ID | Area | Description | Status |
|---------------|----------------------|--|---|
| 405-142085-QA | GCRM Integration | Phone types with spaces - such as "Business Phone" - could not be added to Sage CRM. | This issue is fixed. |
| 405-142179-QA | GCRM Integration | E-mail address was duplicated on company and account. | This issue is fixed. |
| 0-141690-QA | GCRM Integration | PricingList and Taxcodes were not assigned to an account when more than one integration existed and the account did not belong to the first integration in the list. | This issue is fixed. |
| 405-142102-QA | GCRM Integration | A dead lock occurred after updating an opportunity with a table level script. | This issue is fixed. Note: Three new methods are now supported on the query object - BeginTrans, CommitTrans and RollbackTrans. Admin users should exercise extreme caution when using these methods, because all transactions need to be closed properly. The following coding practice should be used: <code>updatequery = CRM.CreateQueryObj(s ql); try{ updatequery.BeginTrans(); updatequery.ExecSql(); updatequery.CommitTrans(); }catch (ex) { updatequery.RollbackTrans(); }</code> " |
| 0-141928-QA | GCRM Integration | Could not create an integration using a CRM user with a password. | This issue is fixed. Please note that if the default Admin password is changed, it must also be set in the GCRM synch engine. |
| 0-141886-QA | GCRM Pricing Service | Actual and Entered Price were missing from pricing service. | This issue is fixed. See also case 0-141734-QA. |
| 0-141935-QA | GCRM Quotes / Orders | The donotreprice check box was missing the quote line items summary screen. | This is by design. |

| Ref ID | Area | Description | Status |
|-------------|-----------------------|--|--|
| 0-121062-QA | Hosting | An error occurred when trying to open a merged document in Word 2007 (on sagecrm.com). | This issue could not be reproduced. |
| 0-115069-QA | Install / Upgrade | Default language in Sage 200 after install is US English. | This issue is closed. It will be addressed by the local integration team. |
| 0-115924-QA | Install / Upgrade | Errors on Oracle upgrade from 6.2f to 7.0. | This issue is fixed. |
| 0-123601-QA | Install / Upgrade | German dashboard files missing. | This issue is fixed. |
| 0-141666-QA | Install / Upgrade | Removing the field orde_associatedid from the Order Summary screen was causing an error. | This issue is fixed. |
| 0-142176-QA | Install / Upgrade | Some errors occurred in CRMEmailPhoneData when upgrading to 7.1 SP1. | This issue is fixed. |
| 0-139518-QA | Install / Upgrade | When the Administrator set a user's security on My CRM to "No Users", and the user preference to "Log Me into Dashboard", then all of CRM tabs were displayed, but not the My CRM menu button. | This issue is fixed. If the user's security is set to My CRM Lists No Users, and the user preference Log Me Into is set to Dashboard, then the Welcome Splash page is displayed. |
| 0-132438-QA | Interactive Dashboard | The report, Lead generated by Source, appeared squashed on the Interactive Dashboard when multiple lead sources were present. | This issue is fixed in v7.1 with the introduction of Fusion Charts. |
| 0-136644-QA | Interactive Dashboard | Column width adjustment was being reset on the Interactive Dashboard. | This issue is fixed. |
| 0-118044-QA | Keyword Search | Opportunity column being updated by escalation service even though no change had been made to the opportunity table. | This issue could not be reproduced. |
| 0-125722-QA | Library and Templates | Library entry could not be created for a Company name containing special characters. | This issue could not be reproduced. |
| 0-117727-QA | Library and Templates | Document merge (Edit a global template then merge option) not working as expected if Create Communication option unchecked. | This issue is fixed. |

| Ref ID | Area | Description | Status |
|---------------|-------------------------------|--|---|
| 0-141909-QA | Library and Templates | Umlauted characters were displayed incorrectly after doing a mail merge from a group. | This issue could not be reproduced. |
| 0-129353-QA | Mobile | Report using date range was not displaying on Blackberry device. | This issue is fixed. |
| 416-141498-QA | Mobile | An SQL error occurred on the mobile opportunity communications list screen. | This issue is fixed. |
| 416-141750-QA | Mobile | After editing a Phone Out communication on mobile, the Communication Action changed to To Do. | This issue is fixed. |
| 416-141754-QA | Mobile | The user was logged out when trying to change the Communication Action on a mobile device. | This issue is fixed. |
| 0-134260-QA | Navigation | Setting field write security on emai_emailaddress to Deny caused error on the IE status bar. | This issue is fixed. |
| 0-125471-QA | Notification | Error when trying to match a company of a lead which was accessed via a Notification. | This issue is fixed. |
| 0-142052-QA | Notification | No e-mail reminder message was being sent after a new task was created when #cmli_comm_userid# was being used in the To field. | This issue is fixed. |
| 0-123636-QA | Opportunities | Opportunity durations were not being updated correctly from the Business Calendar Update Opportunity Records button. | This issue is fixed. |
| 0-134254-QA | Outlook Integration - Classic | User without Administrator rights was not able to install Classic Outlook Plug-in. | This is by design. |
| 0-134360-QA | Outlook Integration - Classic | E-mails were not filed when UAC was switched on. | This is by design. UAC must be off to install and uninstall the Outlook Plug-in for Classic Outlook Integration. |
| 0-123207-QA | Outlook Integration – Classic | Reply to E-mail does not populate "Regarding" field. | This is by design. When you reply to an e-mail, the E-mail Filing screen is displayed with the default values for a new E-mail Out. |

| Ref ID | Area | Description | Status |
|-------------|-------------------------------|---|--|
| 0-82158-QA | Outlook Integration - Classic | Incorrect focus on Main Menu/Administration options when working with CRM from Outlook 2007, with the Full Menu in Outlook preference set to Yes. | This issue is closed. It is a known issue when working with CRM in Outlook 2007 with the Full Menu preference set to Yes. |
| 0-133843-QA | Outlook Integration - Classic | Team value was not being saved when using File & View e-mail feature. | This issue is fixed. |
| 0-133990-QA | Outlook Integration - Classic | Team CRM was showing communication records for external attendees. | This issue is fixed. |
| 0-141746-QA | Outlook Integration - Classic | There was no link to an attachment on a communication created using the Outlook Classic Integration File E-mail button, when the user name had a special character in it. | This issue is fixed. |
| 0-130443-QA | Outlook Integration - Classic | An appointment older than 14 days, but which had been modified within the last 14 days was not synchronized (in Classic Outlook integration). | This issue is fixed. A custom system parameter, OtlPluginSyncDaysBack_Apps is set by default to 14. It can be modified to a greater number of days. Note: This is a system-wide parameter affecting all users with the greatest impact on the first synchronization. Should be used with care. |
| 0-129178-QA | Outlook Integration - Classic | It was not possible to log onto CRM in Outlook with a password longer than 20 characters. | This issue is fixed. Validation has been added to ensure password change will not allow a password longer than 20 characters. |
| 0-102096-QA | Quotes / Orders | New button not appearing for non-admin users for a custom entity created in .NET. | This issue could not be reproduced. |
| 0-119443-QA | Quotes / Orders | Error in date picker in Sage1000 on a screen which uses an IFrame displaying a custom ASP page within another ASP page. | This issue is closed. The workaround is to add the date manually (not using the date picker). |

| Ref ID | Area | Description | Status |
|-------------|------------------|--|---|
| 0-102572-QA | Quotes / Orders | Workflow ID missing when converting Quote to Order. | This issue is closed. Workflow on Quotes and Orders is not supported. |
| 0-124690-QA | Related Entities | Error in Sage 200 when deleting a relationship from the Relationship tab. | This issue is fixed. |
| 0-141090-QA | Related Entities | Long list of "children" relationships in Relationships tab truncated and an SQL error was generated. | This issue is fixed. |
| 0-141081-QA | Reports | It was not possible to enter values for the Weighted Forecast field used in the Search Criteria of a report. | This is by design. An enhancement request has been raised. |
| 0-132034-QA | Reports | Sort order on static group is not retained after saving group. | This issue could not be reproduced. |
| 0-123136-QA | Reports | Report sorting by a selection field code, even though translation was selected. | This issue is fixed. |
| 0-124981-QA | Reports | Code (not translation) was being displayed in report using an "Intelligent Select" field. | This issue is fixed. |
| 0-125246-QA | Reports | SQL error when using week number in data field in report. | This issue is fixed. |
| 0-127959-QA | Reports | Error when running a report in French on a customized view. | This issue is fixed. |
| 0-130180-QA | Reports | An SQL error occurred when running a report using a currency field as one of the search criteria. | This issue is fixed. |
| 0-130877-QA | Reports | Report not displaying when filter criteria included country with "&" in, e.g. Saint Vincent & Grenades. | This issue is fixed. |
| 0-140904-QA | Reports | Enabling the chart option in the report builder removed functions such as Sum and Maximum, and only left the Count option. | This issue is fixed. |
| 0-139279-QA | Reports | Currency fields on report were exported to Excel in a General (not numeric) cell format. | This issue is fixed. Currency fields are exported to Excel as Decimal/Double instead of string. |

| Ref ID | Area | Description | Status |
|---------------|----------------------------|--|---|
| 505-141682-QA | SData Provider | ERP field was not being created as expected. | This issue is closed. The Family Type for ERPSelection options should be 'Choices', not 'ERPSelection'. |
| 505-141683-QA | SData Provider | The height of existing CRM selection fields changed from 1 to 10 (averageLength). These have to have a height of 1. | This issue is fixed. |
| 505-141684-QA | SData Provider | Only unitOfMeasure and sellingUnitOfMeasure were supported in the current schema. | This issue is fixed. |
| 0-118484-QA | Security Management | Opportunity tab can be opened by users who are not in the company team, when the setting for the Company Opportunity tab is set to "No". | This is by design. |
| 0-118600-QA | Security Management | Duplicate issue 0-118484-QA | This issue is by design. |
| 0-134062-QA | Self Service | Self Service Visitor records were not deleted even though person/company record had been deleted. | This issue is fixed. |
| 0-139508-QA | Soap Accounts | Account entity was available on customized integrations where it was not in use. | This issue is fixed. The custom system parameter Use Accounts was updated to 'N'. |
| 0-141977-QA | Soap Integration | An Access Violation error message was received when trying to create a new integration. | This issue is fixed. |
| 0-125589-QA | Timings | Escalation rules on Cases and SLAs not creating on-screen notifications and e-mails. | This issue could not be reproduced. |
| 0-128020-QA | Translation (English Prod) | Error when using Inline Customization feature. | This issue could not be reproduced. |
| 0-120250-QA | User Interface | It was possible to create a company name field longer than it was defined in metadata. This then caused a synchronization error (integrated system). | This issue could not be reproduced. |
| 0-127974-QA | User Interface | Context lost when attempting to delete a communication created during a mail merge. | This issue could not be reproduced. |

| Ref ID | Area | Description | Status |
|-------------|-----------------|---|--|
| 0-137368-QA | User Management | In the German version of Sage CRM the translation of the security profile was overwritten by the caption code, if the security profile was edited from the Security Profile page. | This issue is fixed. The profile description is read-only on the profile page. |
| 0-130329-QA | Web Services | Metadata was not automatically refreshing after changing SOAP web services configuration settings. | This issue is fixed. |
| 0-130902-QA | Workflow | From e-mail address for Send Email Workflow action was defaulting to System Admin - not to the e-mail address specified in the workflow. | This issue could not be reproduced. |
| 0-127967-QA | Workflow | Workflow e-mail action could not be deleted in French system. | This issue is fixed. |
| 0-141639-QA | Workflow | Workflow not sending e-mail to a Lead's user when the lead was reassigned. | This issue is fixed. |

Rolled-up fixes

The following 7.0g fixes have been rolled up to this patch. Please refer to the 7.0 Patch Release Notes for more information.

| Ref ID | Area |
|-------------|------------------|
| 0-140094-QA | Comms/Diary |
| 0-141195-QA | Customization |
| 0-142083-QA | Licensing |
| 0-141328-QA | Quotes / Orders |
| 0-139438-QA | Reports |
| 0-114247-QA | Soap Integration |
| 0-141397-QA | Soap Integration |
| 0-138089-QA | Solo |

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

| Ref ID | Area |
|-------------|---------|
| 0-138666-QA | Reports |

SData Enhancements

7.1d includes a number of enhancements to the way you work with SData gadgets on the Interactive Dashboard.

SData Feed Templates

An Info Admin or Administrator can set up a pre-configured feed from **Template | SData Feed Templates** and assign the feed to specific users or teams.

Adding SData Gadgets

Step 1 in the Gadget Wizard when adding an SData gadget has been improved. End users who want to add an SData gadget to their dashboard no longer have to type in the full feed name in the correct syntax – they can choose a pre-configured one, set up by an Info Admin or Administrator in the new SData Feed Templates area, from a simple drop-down list. The Custom Feed option is still there as well, and if a Custom Feed is added, the feed subsequently appears in that User's Pre-Configured list when the wizard completes.

Advanced Data Filtering

There is a new Step 4 of the Gadget Wizard when setting up an SData List, which lets you combine Include/Excludes, fields, operators and values to set up to 5 filter rules on the selected entity. For example, Include Invoices where Status Is Equal To Overdue. This means that the data that you pull in from the external data source can now be filtered and refined so that only the data you want to see is displayed in the gadget.

Filtering SData Lists

Once you have added an SData List gadget to the dashboard you can now use the Filter by drop-down list and field to narrow the selection further. The Filter by field returns data containing the text entered. You can filter by any “string” (character) type of field, which is displayed on the gadget.

Contextual SData Gadgets for Company and Account Dashboards

Add an SData Gadget to the Company or Account Dashboard and the data returned is automatically filtered by the current Company or Account. For example an SData List gadget showing Invoices on an Account Dashboard will only show invoices for the Account you are viewing.

New SData Record Summary Gadget and SData Gadget Linking

SData gadget linking has been redesigned, and the addition of an SData Record Summary Gadget means you can set up really powerful multi-gadget linking between SData Lists or between SData Lists and SData Record Summary gadgets.

Want to find out more?

Check the Ecosystem (<http://community.sagecrm.com>) for more information and examples in blog articles on the enhancements.

Patch C

Released September 2011

Files included

| | |
|-----------------|---------|
| DLL version | 7.1.0.4 |
| Outlook plugin | 7.1.0.2 |
| Document plugin | 7.1.0.2 |
| CTI plugin | 7.1.0.1 |

Patch C Known Issues

| Ref ID | Area | Description | Status |
|------------|------|--|---|
| 410-141210 | CTI | It was not possible to transfer an incoming call to a different extension. | This is a known issue with the CTI plug-in that is currently being addressed. |

Patch C Issues List

| Ref ID | Area | Description | Status |
|-------------|----------------------|---|--|
| 0-131690-QA | Cases | It was not possible to create or amend a case after all business calendars and SLAs were hard deleted and a new SLA was created without entering a business calendar first. | This issue is fixed. |
| 0-139486-QA | Companies / People | The phone number no longer displayed on the top content area of the company context after upgrading from v6.1 to v7.1 SP1. | This is by design. This has to do with the normalization process that took place between v7.0 and v7.1. The field in previous versions was tComp_PhoneNumber. This has been removed, and the field that is now there is an aliased field from the CRMEmailPhoneData table. |
| 0-136009-QA | Component Management | After deleting a tab and exporting the customization as a component, the deleted tabs still displayed in the generated script. | This issue could not be reproduced. |

| Ref ID | Area | Description | Status |
|---------------|---------------|---|---|
| 0-130284-QA | Configuration | There was an issue with a mail merge document created with Key Attribute Data. | This issue could not be reproduced. |
| 0-133814-QA | Customization | A read-only CreateScript deleted the contents of a field. | This issue is fixed. |
| 0-133948-QA | Dashboard | After creating a Saved Search showing In Progress Cases, where the Created By User was equal to the current user, and creating a dashboard gadget using that Saved Search, the gadget filtered all cases created by the user who created the saved search rather than those. cases for each logged in user. | This issue is fixed. |
| 0-135326-QA | Dashboard | A saved search on the Interactive Dashboard produced the wrong results. | This issue is fixed. |
| 0-138623-QA | Dashboard | Existing tasks lost their links to accounts when they were opened from the classic or interactive dashboard. | This issue is fixed. |
| 426-124534-QA | Data Upload | The Overwrite Current Data With Duplicate Data setting was not working as expected - the expectation was that it would only retain the fields that contained data. | This is by design. Fields are overwritten even if the data contains null values. |
| 0-139260-QA | Data Upload | An error occurred when attempting to upload person data import with the following fields: pers_firstname, pers_lastname, pers_address1, and pers_phonenumber. | This is by design. But now when a user attempts to do a data upload, particularly one containing phone and/or e-mail data, they are informed that the Type field should be filled in, otherwise phone/e-mail data is meaningless in Sage CRM. |
| 0-133109-QA | Data Upload | An error occurred when trying to upgrade data containing numeric fields. | This issue is fixed. |
| 0-133666-QA | Database | A static group was created a based on a custom view associated with the main entity, but any filtering criteria was removed when the group was saved. | This is by design. To work around, a dynamic group should be used instead. |

| Ref ID | Area | Description | Status |
|-------------|-----------------------|---|-------------------------------------|
| 0-139310-QA | Database | Address fields were automatically populated when moving to the New Person screen directly from the company context. | This is by design. |
| 0-131366-QA | E-mail Manager | When e-mails were configured to be sent as plain text, the Send E-mail buttons no longer worked. | This issue is fixed. |
| 0-137103-QA | E-Marketing (SageCRM) | The base currency field was displaying the ID rather than the currency symbol, so when attempting to change the base currency there was no currency translations available for selection. | This issue is fixed. |
| 0-111860-QA | Groups / Target Lists | An SQL error occurred when saving a wave activity. | This issue is fixed. |
| 0-113751-QA | Install / Upgrade | An error occurred in the 6.2Indexes.esChange.html file after upgrading from v6.1 to v6.2. | This is by design. |
| 0-94237-QA | Key Attribute Data | A Key Attribute Data list was formatted in an unexpected way. | This issue is fixed. |
| 0-131762-QA | Key Attribute Data | It was not possible to use the key attribute field type "Currency" for reports or groups. | This issue is fixed. |
| 0-131524-QA | Key Attribute Data | A message was displayed indicating that there were no key attribute groups after a report built on those key attribute groups was deleted. | This issue could not be reproduced. |
| 0-133975-QA | Mobile | It wasn't possible to assign a new device (User Agent) and under Advanced Customization Devices. | This issue could not be reproduced. |
| 0-136224-QA | Opportunities | When the Continue button was clicked in the opportunity context, the user was brought to the new e-mail screen instead of to the list of opportunities. | This issue is fixed. |
| 0-139231-QA | Opportunities | The company name was missing from the top content area of a newly created opportunity. | This issue is fixed. |

| Ref ID | Area | Description | Status |
|-------------|--------------------------------|--|--|
| 0-116002-QA | Order Entry / Products | Accented characters were being stripped out of merged documents. | This issue is fixed. |
| 0-119956-QA | Outlook Integration - Classic | An error occurred when trying to use the following script to add a new person to a company: <pre>function InsertRecord() { x=CRM.GetContextInfo("Communication","Comm_CommunicationId") }</pre> | This is by design. The comm_communicationid is not available on InsertRecord in the Communication table - it is available on PostInsertRecord. Please refer to https://www.sagecrm.com/developerhelp/ for more information. |
| 0-132095-QA | Outlook Integration - Classic | When contact phone numbers were amended in Outlook and then a sync with Sage CRM was performed, Sage CRM stripped the "+" from international dialing codes, making the sync fail. | This issue is fixed. |
| 0-136531-QA | Outlook Integration - Exchange | A script error occurred when filing e-mails against cases. | This issue is fixed. |
| 0-139292-QA | Outlook Integration - Exchange | An error occurred when trying to amend the data in the About field when filing an e-mail. | This issue is fixed. |
| 0-134756-QA | Reports | When the Case Team was added as selection criteria on a report, the selection list was sorted according to the channelid and not alphabetically as in previous versions of the product. | This issue could not be reproduced. |
| 0-139723-QA | Reports | When exporting a report to PDF the columns were of a fixed width, but when exporting it on screen the column widths were dynamic. | This issue is fixed - PDF columns are no also dynamic. |
| 0-138666-QA | Reports | An error occurred when trying to generate a report on a machine with a slow or intermittent network connection. | This issue is fixed - the length of time before reports time out has been increased. |

| Ref ID | Area | Description | Status |
|---------------|----------------------------|--|--|
| 0-137231-QA | Security Management | Deleting a territory profile deleted the whole territory. | This issue is fixed. |
| 0-137323-QA | Soap Integration | After deleting a duplicate 'intforeignid' value from the database, the Deleted flag was not considered while updating records - the deleted instance was updated instead of a new one being added. | This issue could not be reproduced. |
| 0-59899-QA | Soap Integration | The Billing Address and Shipping Address fields were not cleared when an Account was cleared. | This is by design. An enhancement request to update this behavior has been logged. |
| 0-121977-QA | Solo | An error occurred when trying to sync the solo client after upgrade to v7.0. | This issue could not be reproduced. |
| 0-138460-QA | Timings | When days were added to a holiday set and the SLA records were updated, the duration for the CaseProgress records was set to zero. | This issue was only reproducible for demo data but is fixed. |
| 0-132764-QA | Translation (English prod) | An SQL error occurred when adding new captions. | This issue could not be reproduced. |
| 0-112074-QA | User Interface | The keyboard shortcut for the Help buttons (Alt+P) was not working. | This issue is fixed. |
| 0-135475-QA | User Interface | The calendar displayed wrong day/date information depending on what the system timezone was set at. | This issue could not be reproduced. |
| 0-132153-QA | User Management | The calendar displayed wrong day/date information depending on what the system timezone was set at. | This issue could not be reproduced. |
| 505-132822-QA | Web Picker | The About field of an existing communication was incorrectly populated with the details of a newly created opportunity. | This issue is fixed. |
| 0-133617-QA | Web Picker | Restrictor fields were not recognized in the Web Picker. | This is by design. |
| 0-140960-QA | Web Services | When SLAs were turned on for cases, the Web Services interface threw an error when trying to create a case. | This issue is fixed. |
| 0-129065-QA | Web Services | An error occurred on the second line item of a simple Web service project that | This is by design. Because of the dependencies between |

| Ref ID | Area | Description | Status |
|-------------|----------|---|---|
| | | added a quote with two line items to CRM in a single transaction, but the quote and first line item was still added to CRM rather than the transaction being rolled back. | orders, quotes, and line items, there are several transactions involved in saving them. This is because a number of different records get added and re-queried. It is therefore not possible to save them in one transaction. |
| 0-135089-QA | Workflow | An error occurred after creating a new merge document and adding a create merge document action to a workflow transition rule. | This issue could not be reproduced. |

Rolled-up fixes

The following 7.0f fixes have been rolled up to this patch. Please refer to the 7.0 Patch Release Notes for more information.

| Ref ID | Area |
|---------------|-------------------------|
| 0-110564-QA | CTI |
| 0-125765-QA | .Net |
| 0-136960-QA | .Net |
| 0-111500-QA | Cases |
| 0-115619-QA | Cases |
| 0-124885-QA | Cases |
| 0-114717-QA | Comms/Diary |
| 0-117255-QA | Comms/Diary |
| 0-127614-QA | Comms/Diary |
| 0-78828-QA | Comms/Diary |
| 0-112173-QA | Companies / People |
| 0-114752-QA | Companies / People |
| 0-119576-QA | Companies / People |
| 0-124780-QA | Companies / People |
| 0-137019-QA | Companies / People |
| 0-115104-QA | Component Management |
| 0-116704-QA | Core Product |
| 0-111921-QA | Customization |
| 0-114082-QA | Customization |
| 0-116774-QA | Customization |
| 0-78280-QA | Customization |
| 0-139235-QA | Dashboard (Classic) |
| 0-113781-QA | Dashboard (Interactive) |
| 0-115948-QA | Dashboard (Interactive) |
| 0-122929-QA | Dashboard (Interactive) |
| 0-124026-QA | Dashboard (Interactive) |
| 106-125288-QA | Dashboard (Interactive) |

| Ref ID | Area |
|---------------|-------------------------------|
| 0-126766-QA | Data Upload |
| 0-138182-QA | Data Upload |
| 0-125815-QA | Database |
| 0-126899-QA | Database |
| 0-131733-QA | Deduplication |
| 0-116539-QA | E-mail Client |
| 0-125647-QA | E-mail Client |
| 0-131378-QA | E-mail Client |
| 0-113074-QA | E-mail Manager |
| 0-133217-QA | E-mail Manager |
| 0-131629-QA | Export Data |
| 0-122550-QA | Groups / Target Lists |
| 0-131623-QA | Install / Upgrade |
| 426-126602-QA | Install / Upgrade |
| 505-139648-QA | Install / Upgrade |
| 0-112023-QA | Leads |
| 0-117384-QA | Leads |
| 0-113482-QA | Library and Templates |
| 0-116160-QA | Mobile |
| 0-114461-QA | Navigation |
| 0-111866-QA | Notification |
| 0-126590-QA | Notification |
| 0-116904-QA | Outlook Integration - Classic |
| 0-117089-QA | Outlook Integration - Classic |
| 0-117484-QA | Outlook Integration - Classic |
| 0-126915-QA | Outlook Integration - Classic |
| 0-127422-QA | Outlook Integration - Classic |
| 0-130745-QA | Outlook Integration - Classic |
| 0-115833-QA | Reports |
| 0-126725-QA | Reports |
| 0-132798-QA | Reports |
| 0-137193-QA | Reports |
| 0-112579-QA | Soap Accounts |
| 0-123240-QA | Soap Accounts |
| 0-114241-QA | Soap Integration |
| 0-123364-QA | Soap Integration |
| 0-136440-QA | Soap Integration |
| 0-137208-QA | Soap Integration |
| 0-139495-QA | Soap Integration |
| 0-112125-QA | Solutions |
| 0-116924-QA | Translation (English prod) |
| 0-121701-QA | Translation (English prod) |
| 0-117329-QA | User Management |
| 0-125741-QA | Web Picker |
| 0-116276-QA | Workflow |
| 0-117691-QA | Workflow |
| 0-117745-QA | Workflow |
| 0-131169-QA | Workflow |

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

| Ref ID | Area |
|-------------|-------------------------------|
| 0-133101-QA | Comms/Diary |
| 0-134730-QA | Comms/Diary |
| 0-124992-QA | E-mail Client |
| 0-125881-QA | E-mail Client |
| 0-116736-QA | Key Attribute Data |
| 0-136866-QA | Outlook Integration - Classic |
| 0-128651-QA | Security Management |