QAD Customer Relationship Management Release Notes

March 2011

These release notes include information about the latest fixes and changes to QAD Customer Relationship Management (QAD CRM). These changes may affect the way you implement and use this product.

Important Review this document and the QAD CRM errata *before* proceeding with any phase of a QAD CRM implementation.

These release notes are cumulative, with the most recent changes described first. Review the notes for all releases after your currently installed release. Installation and configuration changes may have occurred in those intermediate releases, and unless otherwise noted, apply to the release where they were announced, as well as subsequent releases.

QAD highly recommends that you implement the latest QAD CRM release available. Check the QAD Web site to make sure you have the latest QAD CRM release notes, installation errata, installation guide, and installation media:

http://support.qad.com/

Use the following list to find a specific section:

Release Notes for Current Release

QAD CRM Version: 6.4.4

Product Build Number: 8

Release Date: March 2011

QAD ERP Compatibility: QAD 2007.1 SE, QAD 2008 SE, QAD 2008.1 SE, QAD 2009 SE, QAD 2010 SE, QAD 2009 EE, QAD 2009.1 EE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 EE

QAD CRM Documentation: *Installation Guide: QAD CRM* (78-0931A) and *Administration Guide: QAD CRM* (70-3095A) have been updated for this release.

New Features

On Deletion of a Quote Line in QAD CRM

You can now use a new sales quote control setting to control how sales quote data is synchronized when a sales quote line is deleted from QAD CRM, both for local and remote data synchronizations.

Sales quote lines with different origins—those originally created in QAD CRM and those originally created in QAD Enterprise Applications—are now treated differently in QAD CRM:

- When you delete a sales quote line, only corresponding records with the same origin can be deleted in QAD Enterprise Applications through data synchronization. This precludes situations in which you delete a sales quote line created in QAD CRM and a different sales quote line created in QAD Enterprise Applications that happens to have an identical ID number gets deleted by accident during data synchronization.
- When you delete a sales quote line in QAD CRM and reprice the quote, best pricing is only applied to sales quote lines originally created in QAD Enterprise Applications but not to those originally created in QAD CRM.

Fixes

Internal ID	Issue (Fixed) Description	Affects Version(s)
CRM-3219	The system displays Admin rather than allocated Ext A/C Mgr by default as Auto Allocate information in Opportunity Details.	6.4+
CRM-3370	The system displays incorrect charge and billing summary information.	6.2+
CRM-2346	Changed field label for a user-defined language in CRM is not displayed in the Make a Note window.	6.2+
CRM-95	The Save Settings button is hidden from view in Profile Summary Reports.	6.4+
CRMS-2	Memo items added to CRM quotes do not populate the Ship Type.	6.4.3
CRMS-8	Memo descriptions are not displayed in Quote Print.	6.4.1+
CRMS-7	Record number on the footer of the report is not reflected in the number of quotes on the report.	6.4+
CRM-3556	Creating end users from CRM-originated profiles in Enterprise Applications using Invoice Post and Print creates incorrect data in CRM profiles.	6.4.3
CRM-3550	Progress record locking contentions cause CRM to crash.	6.4.3
CRM-3541	Creating quotes or orders for customers not found in QAD Enterprise Applications causes an error message “Daybook set must exist” and related site information is missing.	N/A
CRMS-6	MEMO descriptions are not displayed on the screen.	6.4.2+

Internal ID	Issue (Fixed) Description	Affects Version(s)
CRM-3537	Xtreme Listview, Unitoolbox Combo, Unibox Treeview and Unibox Statusbar do not support Tahoma fonts on 64 bit OS and Dutch OS.	N/A
CRM-2845	Campaign cost descriptions are the same.	6.1, 6.1.1

Release Notes for Release 6.4.3

QAD CRM Version: 6.4.3

Product Build Number: 6

Release Date: September 2010

QAD ERP Compatibility: QAD 2007.1 SE, QAD 2008 SE, QAD 2008.1 SE, QAD 2009 SE, QAD 2010 SE, QAD 2009 EE, QAD 2009.1 EE, QAD 2010 EE, QAD 2010.1 EE

QAD CRM Documentation: *User Guide: QAD CRM* (78-0817A), *Installation Guide: QAD CRM* (78-0927A), *Administration Guide: QAD CRM* (78-0926A)

New Features

This is a maintenance release with the following updates and certifications:

- Windows 7
- QAD 2010 SE and QAD 2010.1 EE
- QXtend 1.7.0.15
- MS Exchange 2007 integration
- MS Exchange integration in a parent/child network domain configuration
- AIM 3.0.6
- Progress OE10.2B01

Release Notes for Release 6.4

QAD CRM Version: 6.4

Product Build Number: 0

Release Date: March 2010

QAD ERP Compatibility: QAD 2007.1 SE, QAD 2008 SE, QAD 2008.1 SE, QAD 2009 SE, QAD 2009 EE, QAD 2009.1 EE, QAD 2010 EE

QAD CRM Documentation: *User Guide: QAD CRM* (78-0817A), *Installation Guide: QAD CRM* (78-0816A), *Administration Guide: QAD CRM* (78-0852A)

New Features

Below are highlights of some of the key changes included in the latest QAD CRM system:

- Best Pricing

  QAD CRM now employs the best pricing logic in QAD Enterprise Applications during the inquiry and quotation process by using the best pricing What If inquiry as an API.

- HTML Editor

  The Tx Text control now replaces the ThinkHTML ocx control to support rich HTML formatting features in the following e-mail template-related modules:

  - Send Email Composition box
  - Activity (Email Type) Add / Edit Maintenance screen
  - View Email Template Screen
  - Template Design Screen

- Sales Quote Integration Enhancements

  In order to support best pricing and to ensure that QAD CRM can generate quotes that comply with customers' requirements, additional fields and updates have been added to the existing integration between opportunities and sales quotes/sales orders in QAD Enterprise Applications.

  These requirements emerged from a number of customers and partners implementing previous versions of CRM.

Release Notes for Release 6.3

QAD CRM Version: 6.3

Product Build Number: 0

Release Date: September 2009

QAD ERP Compatibility: QAD 2008 SE, QAD 2008.1 SE, QAD 2009 SE, QAD 2009 EE, QAD 2009.1 EE

QAD CRM Documentation: *User Guide: QAD CRM* (78-0707C), *Installation Guide: QAD CRM* (78-0706D), *Administration Guide: QAD CRM* (78-0705A)

New Features

QAD CRM 6.3 is a significant new release introducing new capabilities, enhancements and defect fixes that have been created since the last release.

Below are highlights of some of the key changes included in the QAD CRM 6.3 system:

- Multi-Domain Support

  QAD CRM 6.3 now enables every active QAD Enterprise Applications domain to be integrated with a corresponding business unit in QAD CRM. Prior releases of QAD CRM only supported a single integrated domain. This capability is available for both Standard and Enterprise editions.
- Unicode Support

  QAD CRM 6.3 is now Unicode-compliant and is capable of supporting double-byte languages.
- Support for QAD 2009 EE and 2009.1 EE
- Integration with QXtend

  QAD CRM 6.3 synchronizes the following Financials-related data with QAD EE through QXtend:
  - Suppliers and customers
  - Users
  - Currencies and exchange rates
  - Domains
- Support for Vista and Windows 2008 Server OS

  QAD CRM 6.3 can run on Vista and Windows 2008 Server operating systems.

Customer Enhancements

- The 64 character limit on the Next Stage string has been removed. This means that the user can now create an unlimited number of stages for an opportunity.
- This release has enhanced its capability of sorting activities in the date time order in Profile Management.

Customer Issues Addressed

The following issues have been fixed in this release of QAD CRM:

- The target sales order in QAD ERP was incorrectly locked by a CRM process during sales order integration.
- The system prematurely exited when the Close button in the Report Viewer was selected.

- CRM opportunities were created during sales order integration even when integration flags were turned off.
- Profile and contact information did not default to activities created in Issue Management.
- The automatic e-mail ID was not correctly resolved by Microsoft Outlook for internal e-mail users.
- Array subscript out of range error in Contact Details.
- CRM programs compiling error on the 64-bit Linux platform.

Known Limitations

- Microsoft Exchange Integration

  The QAD CRM is certified to be integrated with Microsoft Exchange and supports Exchange implementations with a single Exchange domain only.

  This limitation also applies to all previous releases of QAD CRM.

Release Notes for Release 6.1.1

QAD CRM version: 6.1.1

Product Build Number: 5

Release Date: December 2008

QAD ERP Compatibility: QAD Enterprise Applications 2007.1, QAD Enterprise Applications 2008 Standard Edition, QAD Enterprise Applications 2008.1 Standard Edition

QAD CRM Documentation: *User Guide: QAD CRM* (78-*0707B*), *Installation Guide: QAD CRM (78-0706C), Administration Guide: QAD CRM* (78-*0705A*)

QAD CRM 6.1.1 is primarily a maintenance release that includes the following minor enhancements and defect fixes:

- QAD CRM 6.1.1 has been certified to run on QAD 2008.1 Standard in addition to QAD 2007.1 and QAD 2008 Standard.
- This release of QAD CRM now supports Progress OpenEdge 10.1C01, as well as Progress OpenEdge 10.1B02 and 10.1B03.
- The installation script for this release of QAD CRM enables existing QAD CRM 6.1 customers to easily upgrade to the current release.
- The system now applies user-based security to the event log. Users without administrative rights can only view warning and error records related to their own user IDs.
- The Other Stages tab now defaults to the current opportunity stage rather than the initial stage.
- Customer Console now processes sales history data from QAD ERP based on the user-defined fiscal start month value in QAD ERP.
- This release has resolved the slow performance issue when Customer Console displays sales quote, sales order, and invoice information from a QAD ERP database that has a large number of records in these tables.
- Customer Console has been enhanced to allow data to be displayed based on an invoice date range.
- Activity Browse and History Browse now correctly sort information by Activity Date and Time.
- The Query Builder function can now correctly process the Product table and tables such as the Audit table which do not contain the auth field.
- SIC Code Lookup now correctly handles the comma character (,) in the SIC Group value.
- Incorrect call time assignment in Issue Management is now corrected.
- In Quote Print, “Letter Name” is now correctly saved as part of History.

Release Notes for Version 6.1

QAD CRM version: 6.1

Product Build Number: 21

Release Date: September 2008

QAD ERP Compatibility: QAD Enterprise Applications 2007.1, QAD Enterprise Applications 2008 Standard Edition

QAD CRM Documentation: *User Guide: QAD CRM* (78-*0707B*), *Installation Guide: QAD CRM (78-0706B), Administration Guide: QAD CRM* (78-*0705A*)

Interface Enhancements

QAD CRM version 6.1 includes the following interface enhancements:

1 Calls are now referred to as Issues. Buttons and labels have changed accordingly in some screens.

2 Exchange Integration now supports multiple Exchange Servers and MS Outlook 2007 certification.

3 In the Remote Sales Data Synchronization module, the following enhancements are available:

- The system now lets you create a remote node by simply attaching a user ID to a node. If you select the Attach this Node to a User check box and enter a user ID, the system automatically attaches the relevant teams and displays the team structure.
- If you change the team structure in Settings|Organization|Teams, the system attaches or detaches profiles and modifies the activity team list displayed in the Node Details window.

New Features

Conversion routines are now available and can be used to convert older databases of QAD CRM versions 5.8.2 or 5.8.3 to the current version 6.1 format.

Known Issues

1 The following known issues exist in the Activities module:

a In the Contacts tab of the Process Activity window, `Last Contacted` always appears as the first column.

b If a user has multiple activity reminders scheduled, the Activity Reminder function has performance issues.

2 The following known issues exist in the Remote Sales Data Synchronization module:

a Since Progress is not a multi-threaded application, you cannot work on other modules when some synchronization processes such as data load and data extraction are being performed.

b Multiple rules set against a single profile do not display correctly on the Profiles tab of the Node Details window. The subscribed profile displays only under the first rule that is applied to it.

c The Last Sent and Last Received dates appearing on the Details tab of the Node Details window do not always display actual update dates correctly. This happens in the following circumstances when you are logged in through the host database:

- When data loading to the remote node is completed before the dumping starts from the remote node.
- When the data loading to the remote database completes after the dumping of the remote database.

d When transferring data to a remote node using the AppServer, the node re-creation works successfully only for approximately 1.5 million records. The AppServer does not successfully support larger data transfers during remote node re-creation and data transfer.

e The Remember Settings check box that appears on the Logout window does not participate in data synchronization. Personal settings saved in the host node are therefore not available on the remote node.

f Though the Node Details window has multiple tabs, selection of only one default action is supported at a time. This happens because you can set a default action against only one program object at a time, and all the objects in the Node Details window are created under a single program.

3 The HTML editor that opens when you click the Send an Email button from the toolbar is not working as expected. Start with the Source tab of the editor, change the Body Type from HTML to Text, enter fresh text, and then change back the body type to HTML. In such a scenario, the Source tab does not display the updated text.

4 The Global Search and Replace function is not available in the current version of the product.

5 The keyboard shortcuts Ctrl + P and Ctrl + N do not let the user navigate to the previous and next record respectively in the following places within the system:

- Browser in Activities tab
- Browser in History tab
- Tasks browser in Activities module
- List view in Reminder screen
- List view in Attachment tab

6 The keyboard shortcut Ctrl + B does not open the Create and Modification Details window in any non-database field.

7 The system does not support multiple select operations for more than 200 records at a time.

8 In all the tree views within the system that are related to Contacts, the former employees are not displayed in strikethrough format.

9 The Remember Settings check box that appears on the Logout window does not work with the extended search facility. You have to enter conditions for extended search at each login.

10 When you modify a widget label using the Field Object Manager/Program Manager/Wizard Manager, ensure that the length of the new string is the same as the one you are changing. The system interface is unable to accommodate and correctly display longer strings.

11 At any point within the system, when you click the Save and New button, the cursor displays at the second field or fill-in of the new record instead of the first.

12 Throughout QAD CRM the following date and time fields are displayed in the GMT format:

- Create Date
- Modified Date
- Create Time
- Modified Time

Before saving the above date and time fields, the system converts their values to GMT based on the node time zone. However, before displaying them the system is unable to convert them back to the current node time zone.

13 The following known issues exist in the Exchange Server Integration module:

a QAD CRM Public Folder Management is unable to display public folders if the folder name contains single or double quotes. Contact Automation with these folders is not supported.

b Custom search conditions applied on the Contact tab are lost on changing the selected public folder.

c The following do not participate in Activity Automation:

- QAD CRM activity instances.
- QAD CRM recurring activities with instances.
- MS Outlook recurring appointments with instances.
- MS Outlook appointment instances.
- QAD CRM activities corresponding to user attendees. These are not transferred to the Exchange server. Instead, such attendees receive meeting invitations through their e-mail accounts.

Release Notes for Version 6.0

QAD SFA and MA version: 6.0

Release Date: March 2008

QAD ERP Compatibility: QAD Enterprise Applications 2007.1

QAD SFA and MA Documentation: *User Guide: QAD SFA and MA* (78-*0707A*), *Installation Guide: QAD SFA and MA (78-0706A)*

Interface Enhancements

QAD SFA and MA version 6.0 has an improved user interface (UI) to enhance the user experience. The UI enhancements include:

1 Improved browsers provide the ability to:
   - Access details and tab folders directly from the browser view for improved access to system records.
   - Select multiple records in browsers to facilitate the performance of routine tasks.
   - Resize the browser area to optimize browser use.
   - Restore browser display settings to supplied defaults.
   - Run external programs from any browser in the system.

An enhanced search facility now lets you perform an extended search by using up to five fields in a browser. All search criteria entered during a session are retained by the system for searching previously accessed records. The Search button is now visible all the time unless hidden by the user.

2 Configurable toolbar and direct menu access
   - Each module now has its own toolbar that can be switched on or off, or docked within or outside the main window.
   - Commonly performed tasks such as adding a note, creating activities, and modifying existing profiles and contacts are now directly accessible from the system toolbar.
   - Menus can now be displayed using the tree view or as buttons, as in Microsoft Outlook. A user can choose to display menus using either format depending on personal preference.
   - The right-click menus have been enhanced, and more intuitive images have been added.

3 Personal menu settings and user preferences can now be retained when logging out of the system by selecting the Remember Settings check box.

New Features

Apart from enhancements to the user interface, QAD SFA and MA version 6.0 also includes the following new features:

1 Multi-language support
   - Up to three languages can now be assigned to a user. A user can easily switch between languages as required.
   - Company-specific labels can be created easily.
   - Users can now translate application labels without having to use the Progress Translation Manager. This new function lets users create new translations and company-specific labels.

2 Improved filtering of records

- Users can now filter profiles, contacts, opportunities, campaigns, calls, and the installed base from within the respective browser.
- In addition, records in certain modules—namely Profiles, Contacts, Opportunities, and Installed Base—can now be filtered using analysis groups or codes, regardless of whether analysis groups or codes are attached.

3 Field-level improvements

- Addresses can now be displayed in native format. For example, an address for a US-based profile uses a different format than an address for a UK-based profile.
- Mandatory fields are now indicated with a marker.
- New operators are now available for specifying conditions. They include "Ignore,""Until today,""exists,""does not exist,""1st/2nd/3rd/4th qrt," and so on. This enhances the user's ability to narrow down records selected.
- Values in specific fields can now be identified and replaced using global search and replace.
- User-defined frames and fields can now be created in browsers, filters, and reports.
- Auditing can now be enabled for any field using the Field Object Manager.

4 Using the system HTML editor, e-mail templates can be created when defining activities, managing call escalation, creating marketing campaigns, and so on.

Module Level Enhancements

The table below describes the enhancements in the current release for the various system modules.

Module	Enhancements
Activities	• Microsoft Outlook-style calendar views are now provided. • Task-specific data entry frames. For example, the appointment entry frame is different from the letter creation frame. • Activity records can now be associated with multiple objects—profiles, contacts, users, opportunities, service calls and so on. • Activities can now be assigned a status—Started, Not Started, Complete, Partly Finished, and so on. • Activities can now be scheduled to occur at regular intervals—for example, once a week. A scheduled activity can also be rescheduled. • A new activity type of task has been added. Tasks are not associated with profiles and are not required to be processed by the system. Users can create tasks for themselves or assign them to a team member. Tasks can be monitored in the same way as activities.
AdminService	A new Microsoft Windows service has been added for managing background tasks, such as sending e-mails and monitoring a user's inbox. These tasks are executed when the associated job becomes due in the database. AdminService provides a more robust integration with Exchange mailboxes.

Module	Enhancements
Campaigns	• Campaign objective, related costs, and potential targets now display on the Campaigns screen. Campaign-related notes can be recorded using the Text tab. • A status can be assigned to each campaign (In Progress, On Hold, Closed, and so on). • Campaign-specific templates are now available for events, product launches, exhibitions, and so on. Templates are now available for different types of event. Activities and tasks can now be assigned to a campaign template. • A user can now build a campaign target list by using existing records, as well as add user-defined fields for specific campaign types to record additional information. • A user can now define the type of inclusions that are delivered to their campaign list targets, giving them greater control over their marketing campaign mailing. • Targets can now be copied from one campaign to another. In addition, planning tasks, cost, stage, stage activity, and campaign targets can be copied from one campaign to another. You can also plan and manage campaign-specific tasks. • You now can create follow-up activities for targets in a given campaign stage. Follow-up activities can be delegated to the profile account manager by default, or to a team member through manual selection. • You now can record the details of campaign inclusions, such as type—magazine advertisement, newspaper insert, brochure, and so on—and other details. Campaign success can be analyzed based on the media type and its effectiveness. • You now can define exclusion lists for a campaign. An exclusion list specifies the target records to exclude for a specific stage of a campaign, or for an entire campaign.
Contacts	• You can now create reminders for birthdays and anniversaries of your contacts • You can now define communication preferences for each contact record. • You can now track the various profiles to which a contact is presently associated, or was associated with in the past (as an employee). The system also facilitates attaching contacts to contacts as a network. • You can now easily attach or detach contacts to mailing lists. The management of opt-in and opt-out lists has been enhanced. • You can now send selected contact address details to various address labels. Address labels can be produced in the format of the country of address. • Up to 50 fields are now available to define data entry frames according to personal requirement. These user-defined frames consist of user-defined fields as well as regular fields. • You can now handpick contacts and attach them to previously defined campaigns. You also can display the campaigns in which a given contact participates. • There is enhanced visibility of marketing activities carried out against contacts. For example, you can now view the answers collected using scripts by using the Scripts tab.
Customer Console	• This facility lets you view data from QAD ERP for a given customer. Viewable data includes quotes, order, invoices, account receivable, product sales history, installed base, and service calls. Customer Console provides a 360-degree view of the selected customer without switching platforms or screens. • You can search customers using search criteria such as customer number, invoice number, and so on, helping to reduce the time required to find relevant information in QAD ERP.
Customer Service	Customer Service helps you to manage customer interaction more efficiently by registering customer complaints relating to service or delivery. This new module contains the following functions: • Call Management • Installed Base • Service Queues • CSR Maintenance • Customer Service Settings • Contracts
Dashboard	Displays a summary of the day's activities, tasks, top profiles, and opportunities. You can display either an individual or a corporate view.
Data Synchronization	Lets a user define a schedule for synchronizing records defined in Remote Sales with the main system database records. The system now prompts a user to synchronize their data before logging off from the system.

Module	Enhancements
Menu Manager	• Menus are now organized more logically and menu sections can be enabled or disabled. • Program objects can now store not just details of the fields visible in the frames, but also of all frame elements such as rectangles and comments. • You can now designate the sequence in which programs are run. • You can hide certain menu options if associated databases are not connected, reducing runtime errors.
Opportunities	You can attach profiles linked to opportunities to an existing campaign or campaign stage. This option is useful when follow-up activities (such as running a customer satisfaction script) must be performed after opportunities reach a certain stage.
Preferences	Users can now personalize: • Integration with Microsoft Outlook • Report settings • Regional settings • Activity settings • Appearance settings
Profile	• The display of activities has been enhanced to provide more information. Activity information now can be sorted easily. • The new Profile Add wizard makes entering data easier through its user-friendly interface. Data is checked when saved to avoid duplicate entries. • Address and segmentation information is now available in a single frame. • You now can allocate both internal and external account managers to a profile depending on criteria entered. • The search feature for profiles has been enhanced to allow searches using alias names instead of normal names. • Script analysis has been enhanced: for a selected profile the new Scripts tab displays the scripts used and answers recorded.
Reports	• Reports are now created using Crystal Reports, providing enhanced control on data presentation, sorting, and highlighting of exception cases. Reports can now be exported in various formats. • Additional reports in predefined formats are now available. The number of standard reports now available provides better data coverage. • User-defined reports can now be generated. You can use existing templates to create additional reports.
Users	• Module now stores multiple user addresses and telephone numbers. • You can now maintain vacation schedules for users. Different types of vacations are indicated through the use of colors.

Known Issues

1. In the Data Synchronization module, the system displays an error message in the following circumstances on synchronization:
   - Adding a node record with the same details in the host database and the regional database. Error message: Node already exists with key.
   - Creating a user record in the host and the regional databases with the same user ID. Error message: User already exists with user_id.
   - Creating a table record in both the host and the regional databases with same unique key. Error message: Table already exists with table_id.
2. In the Activities module, the following known issues exist:
   a. Only the Activities calendar displays activities that are Closed using strikethrough format. Closed activities in the Day, Week, Work Week, and Month views are indicated by the text "Closed:" prefixed before the activity subject.

b. Only the Activities calendar displays activities that are Overdue, Recurring, or High Priority in color. Activities in the Day, Week, Work Week, and Month views do not display in color.

c. Day, Week, Work Week, and Month views of the calendar do not display non-working days of business units and users in a different color.

d. A recurrence activity record that has not been edited does not display in the Activities browser. Only recurrence series and edited instances are displayed.

e. Such a recurrence activity cannot be created so that its instance occurs on two different days for the user who is creating the activity.

f. Keyboard navigation does not work with the calendar.

3. The following known issues exist in the Global Search and Replace function:
   - Business rules are not checked while performing a global search and replace operation. You can currently enter junk values in some key fields. For example, the prospect external account manager can be set to some nonexistent user ID. Although the profile maintenance screens have validations to prevent such junk entries from being entered for prospect account managers, the global search and replace facility does not perform such checks. As a result, when a user tries to modify and save a profile record after performing a global search and replace, the system displays the error message: Invalid External Account Manager. Update cancelled.
   - Performing the Replace function by just selecting the table and not entering any condition displays the error message: Zero records have been modified.

4. The system cannot filter records based on data containing special characters, though the system can store records with such characters.

5. Shortcut keys do not work for the Crystal Records interface. When the focus is on a Crystal object and the user tries to navigate with shortcut keys, the system does not invoke the required interface.

6. The following known issues exist in the Reports module:

   a. Color settings that are applied using the Show Column interface work for data only. The settings do not work for the report header.

   b. The system report viewer truncates displayed column labels. If this occurs, a possible workaround is to enable word wrapping so that longer labels can display on the next line. You also can increase the width of the affected columns.

7. In edit mode, the navigation panel is always dimmed in the Activity Details and Task Details screens.

8. When an object is modified in the source tab of ThinkHTML control, the Save and Undo buttons are not enabled. A workaround is to save all content modifications using the Design tab.

9. In the Date Time Picker, the keyboard shortcuts Ctrl + Home and Ctrl + End do not let the user navigate to the first and last record respectively.

10. Sorting does not work on calculated columns.

11. Entering a question mark (?) in the User ID field may cause the mail merge and Query Builder functionality in the system to become unstable.

12. Context-sensitivity in the online Help system is not enabled. You must navigate to the section you want using the Help contents page.

13. Although the online Help gets invoked on a Windows 2003 Server machine, it does not display any content in the right pane.