

# QAD Customer Relationship Management Release Notes

March 2015

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

**Important** Review this document *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 Document Library to make sure that you have the latest QAD CRM release notes, installation guide, and installation media:

<https://www.qad.com/documentlibrary>

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# Release Notes for Current Release

**QAD CRM Version:** 6.7

**Release Date:** March 2015

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE, QAD 2012 SE, QAD 2012.1 EE, QAD 2013 EE, QAD 2013.1 EE, QAD 2014 SE, QAD 2014 EE, QAD 2015 EE

**QAD CRM Documentation:** *QAD CRM Installation Guide (78-0927-6.7)*, *QAD CRM Administration Guide (70-3095-6.7)*, and *QAD CRM User Guide (70-3192-6.7)* have been updated for this release.

## New and Changed Features

This release of QAD CRM is a maintenance release and includes the following features and certifications:

- Deletion of Duplicate Profile (De-Dupe) functionality added
- Progress OE11.4 supported
- Integration with Microsoft Exchange 2013 certified

## Fixes

Internal ID	Fixed Issue Description	Affected Versions
CRM-4595	Rectified the issue where the Opportunity Line "Margin%" security was based on the Net Price field. It has been fixed to be based upon the Cost Price field.	
CRM-4769	A new Security Certificate has been added to this release. Previously, the Security Certificate had Expired for CRM Web Client and needed to be manually refreshed with the new certificate.	
CRM-4157	The Admin Service has been modified so that the automation jobs are stopped when the instance is not active. Previously, the Admin Service jobs still ran even if the admin service instance was inactive.	6.5+
CRM-4134	You can send the contacts or use the filters when contact transfer is set to manual on Remote Sales. Previously, you could not send contacts to the Exchange Server in Remote Sales.	6.6+
CRM-4630	The Exchange automation creates a QADCRM category on the calendar folder of a user mailbox. Previously, it failed to create this folder.	6.6.1+
CRM-4741 / ERQS-565	Added a message and an option that allows you to specify whether the deletion of a contact is going to result in the deletion of all opportunities and any other associated data. Previously, all associated data was deleted without warning.	6.5+
CRM-4768 / CRMS-166	The Profile Summary Report now is sorted based upon the start date and time. Previously, it was sorted on the Subject.	6.6.1+
CRM-4771	Excluded program <code>rtxthist.p</code> from being copied to the back-end server as it is not required there. Previously, this program was being copied to the Linux server back-end code and the result was a compile error.	6.6.1+
CRM-4775	Removed the file <code>pxttmsg.i</code> from the <code>integration/mfgpro</code> folder. Previously, this file was there as well as the <code>si/xrc</code> directory, and the one in the <code>integration/mfgpro</code> folder was obsolete.	6.6.1+

Internal ID	Fixed Issue Description	Affected Versions
CRM-4781	Appointments and tasks are synchronized for a new CRM user from Exchange. Previously, Exchange integration failed to synchronize Appointment and Tasks of a new CRM user from Microsoft Exchange to CRM for the first time.	6.6.1+
CRM-4795	Contact Persons no longer displays the contact name of the first record as blank after executing a search twice. Previously, after two consecutive searches, the contact name appeared blank.	6.6.3
CRM-4823	The Export to Excel includes the field headers. Previously, no column headers were displayed within the Excel output.	6.6.2
CRMS-91	All Profiles and other CRM programs now perform sorting successfully when column headers Object Desc., Object Type, Filename, Location, Linked By, and Linked Date are clicked in their Attachment tab. Previously, sorting was not done. <b>Note:</b> This issue has been addressed since the 6.6.2 release.	6.6.1
CRMS-154	Users can only access the cost price if they are authorized access. Previously, users could access the cost price field even if they were not authorized to.	6.6.2+
CRMS-159	Remote Node and Host Machine are included in automatic synchronization. Previously, Node Send and Receive Settings were not being taken into account and automatic synchronization was failing.	6.6.1+
CRMS-161	The maximum value for a user-defined field has been extended. Previously, the maximum value for user-defined field decimal format was 9,999,999.	6.5+
CRMS-162	A message to inform the user that an e-mail cannot be composed using the chosen template has been added. Previously, there was no message and the template body was pasted into the Microsoft Outlook e-mail composing screen when the e-mail address was not defined for a selected profile/contact.	6.6.1+
CRMS-164	Contact name is saved when a user is trying to change the contact name from the generic "Sir/Madam" to something else. Previously, there was no way to save the Contact name using Edit Contact in All Profiles.	6.5+
CRMS-165	Rectified a compile issue with program <code>pupderpkey.p</code> . Previously, there was a problem with the installation and compilation of hotfix CRMS-147 if it was delivered in a Linux environment.	6.6.1+
CRMS-167	Added validation to ensure that a blank Contact name cannot be saved within in All Profile - Contacts and Contact Persons. Previously, there was a possibility of a blank contact name being saved.	6.6.1+
CRMS-156	History (proftnx) is updated correctly. Previously the "Make a Note" did not display the user-defined error specified in the Field Object Manager.	6.6+
CRMS-149	CRM Reprice functionality gives the same result as the what-if function. Previously, the Reprice button did not give the same result.	6.6.1+
CRMS-173	Profile Add Wizard issues an error message for mandatory fields. Previously, it would save a profile record when a user-defined field failed validation.	6.6.3
CRMS-174	Quote details now transfer the correct credit terms to the ERP when CRM-to-ERP integration is turned on. Previously, incorrect credit terms were transferred.	6.6.1+
CRMS-175	All Profiles now displays updated "customer class" when this field is updated in the ERP for a Customer when ERP-to-CRM Integration is on. Previously, the changes to Customer class in ERP were not updated to CRM.	6.6.1+

<b>Internal ID</b>	<b>Fixed Issue Description</b>	<b>Affected Versions</b>
CRMS-177	Lookup values no longer display duplicate country codes when the description of a country code is changed in ERP and now display the updated description of existing country code. Previously, duplicate country codes were displayed.	6.6.1+
CRMS-178 / CRMS-179	The Service Queues, All Profiles Menu, and a number of other programs within CRM no longer display the Progress error “Attempt to update ADMProps record data exceeding 32000. (12370)” when the logged-in user is not a system administrator and belongs to two teams having large number of sub-teams. Previously, the Progress error was displayed.	6.1.1+
CRMS-180	All Profiles now displays the column Industry in Show Columns, Sort option, and Profile Browser. Previously, the column Industry was not displayed.	6.6.1+
CRMS-183	Product no longer displays field in Hidden Columns when Show Column is selected and Field Object Manager for that field “Enter Permission Group(s) who can see this Field” is assigned a Group the logged user is not assigned to and “Enter those User ID(s) who should not update this Field” has a value of other user. Previously, the field was displayed in Hidden Columns.	6.6.1+
CRMS-184	All Profiles no longer displays the error “update canceled” when a Profile is updated with a team that does not belong to the logged user.	6.6.1+
CRMS-185	All Profiles now displays the user-defined error specified in Field Object Manager for the access_list field and does not create the profile when access_list is defined as non-blank in Field Object Manager and user tries to create new profile without entering any values on this field in Further Details tab. Previously, the error message was not displayed and the profile was created.	6.6.3
CRMS-186	Profile Filter and functions within CRM no longer display the PROGRESS error “Attempt to update ADMProps record data exceeding 32000. (12370)” when the logged-in user is not a system administrator and belongs to teams having large number of sub-teams.	

## Release Notes for Release 6.6.3

**QAD CRM Version:** 6.6.3

**Release Date:** September 2014

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE, QAD 2012 SE, QAD 2012.1 EE, QAD 2013 EE, QAD 2013.1 EE, QAD 2014 SE, QAD 2014 EE

**QAD CRM Documentation:** *Installation Guide: QAD CRM (78-0927-6.6.3)*, *Administration Guide: QAD CRM (70-3095-6.6.3)*, and *User Guide: QAD CRM (70-3192-6.6.3)* have been updated for this release.

### New and Changed Features

This release of QAD CRM is a maintenance release and includes the following certifications:

- Progress OE11.3.2, OE10.2B08
- Windows8 64 bit for CRM deployed with OE10.2B07, OE10.2B08, OE11.3.1, or OE11.3.2.
- Windows8.1 64 bit for CRM deployed with OE10.2B08 or OE11.3.2.

### Fixes

Internal ID	Fixed Issue Description	Affected Versions
CRMS-140 / Q1082126	CRM creates the debtor in the ERP when Spanish and Chinese characters with spaces in the profile name and contact name. Previously in this scenario, the debtor was not created.	6.5.1+
CRM-4522	The Define Field Ranges section within the User Defined Report wizard was not accessible after clicking the Next button.	6.6.2
CRM-4533	The first letter was not completely visible from within Report View.	6.6.2
Q1082796 / CRMS-142	Admin Service fails to initialize when the server is restarted.	6.6.1+
CRMS-139	Quote Print correctly prints the Item description when it contains special characters like "+". Previously in this scenario, the Item Description was incorrectly displayed.	6.5.1+
CRMS-136	Activities and functions display the default filter when CRM is restarted after a new filter was created with "Default" checked. Previously in this scenario, default filter was not displayed.	6.6.1+
CRMS-134	Opportunity Line Details no longer moves control to "Product Id" field and modifies it when an existing Opportunity line is copied to a new line using the Copy button and the quantity field modified. Previously in this scenario, the control was moved to the Product Id field and modified it.	6.6.1+
CRMS-125	Contact/Profile does not default correctly from Make a Note when creating a Follow-up Activity from the Note if the "Associate it with:" has no records attached.	6.6.1+
CRMS-124	Standard Reports displays History Report when option "Run this report" is selected on History Report and report component is not installed on the client machine. Previously, in this scenario, report was not displayed.	6.6.1+
CRMS-123	All Profiles no longer truncates the telephone number upon saving data with "Extension:" having more than four digits.	6.6.1+

<b>Internal ID</b>	<b>Fixed Issue Description</b>	<b>Affected Versions</b>
CRMS-121	Copy Contact no longer displays error “Invalid profile (2041)” when contact is selected from an existing Profile to copy to another Profile with the same name by selecting another profile from Find Profile/Contact window. Previously, in this scenario, error message was displayed and contact was not copied.	6.6.1+
CRMS-120	Opportunity > Other Stages does not display “INVOICED” data after the Order was completely shipped and invoiced in QAD ERP.	6.6.1+
CRMS-118	All Profiles and certain functions now allow the use of up/down arrow keys in a User Defined Field (UDF) of type “Editor”. Previously, in this scenario, the up/down arrow keys did not work.	6.6.1+
CRMS-117	Attachment tab of All Profiles now correctly opens files attached from a folder named in other language alphabets (e.g., Polish) when CRM is using UTF-8 code page. Previously in this scenario, the error “Cannot find appropriate application to open. Make sure that the file and path name are correct” was displayed.	6.5.1+
CRM-4671	AdminService administrator was not able to receive notification email when CRM AppServer could not be connected.	6.6.2
CRM-4672	Customer Console > Go to QAD ERP > Account > Customer Account throws a CRM error 2795.	6.6.2
CRM-4606	QAD CRM has been modified so that the integration now tries to connect to the AppServer using the Direct Connect method first; if this way does not work, it then connects using the AppServer Server name (the “Application Service” name defined in the CRM screen “AppServer Service Maintenance”).	6.5.1+
CRM-4580	From within Tools and Utilities > Event Log > Activity Automation, the format of the log was not correct. Users were not able to check integration info properly.	6.6.2
CRM-4615	In CRM 6.6.2, some labels in Users > Exchange Server Settings were changed. Some labels were duplicated and may have been confusing.	6.6.2
CRM-4515	Changes to the field foreground color setting were not saving.	6.6.1+
CRM-4523	Changes to the foreground and background color for fields of User Reports are not working.	6.6.1+
CRM-4534	After an export within the Planned Activity Report, the Save button is enabled. Previously, the Save button was disabled after an export and users were not able to save changes.	6.6.2
CRM-4627	Entity Relationship Diagrams have been added to the <i>CRM User Guide</i> .	

## Release Notes for Release 6.6.2

**QAD CRM Version:** 6.6.2

**Release Date:** March 2014

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE, QAD 2012 SE, QAD 2012.1 EE, QAD 2013 EE, QAD 2013.1 EE, QAD 2014 EE

**QAD CRM Documentation:** *Installation Guide: QAD CRM (78-0927-6.6.2)*, *Administration Guide: QAD CRM (70-3095-6.6.2)*, and *User Guide: QAD CRM (70-3192-6.6.2)* have been updated for this release.

### New and Changed Features

- 1 This release of QAD CRM is a maintenance release and includes the following certifications:
  - QAD 2014 EE
  - Progress OE11.3.1, OE11.2.1, OE10.2B07
- 2 Crystal Graphing function is disabled in CRM 6.6.2.

### Fixes

Internal ID	Fixed Issue Description	Affected Versions
CRMS-37	CRM-created order does not create the correct discount info in ERP.	6.5.1+
CRMS-55	Incorrect Ship-To Address Update from CRM to ERP in Sales Quotes/Order integration.	6.5.1+
CRMS-52	Contact information is incorrectly changed when ORDER gets iterated in ERP.	6.5.1+
CRMS-90	History for Profile is not displayed correctly in Customer Console.	6.5.1+
CRMS-87	It is possible to save Activities -> Appointment Details without entering mandatory info.	6.5.1+
CRMS-73	The integration issue when releasing a second order to ERP from the same CRM quote is fixed.	6.5.1+
CRMS-84	Incorrect Phone Labels in languages other than English is fixed.	6.5.1+
CRMS-101	Phone and Email button labels in Contact Details under All Profile now display correctly in non-English languages.	6.5.1+
CRMS-63	Opportunity Filters using Product or Product Line works now.	6.5.1+
CRM-4484 / Q1062159	Previously, Email Automation failed giving the error "The server cannot service the request right now. Try Again Later". This issue is now fixed.	6.5.1+
CRMS-75	Transfer of All Day Appointment from CRM to MS Exchange 2007 / 2010 works properly now.	6.5.1+
Q1008211	Previously, the e-mail integration from Outlook to CRM did not work when the e-mail from the same contact was already in CRM. This issue is fixed now.	6.5.1+
CA931189	Previously, the appointments initiated from a third party could not be transferred from Exchange into CRM regardless of category setting. This issue is fixed now.	6.5.1+

# Release Notes for Release 6.6.1

**QAD CRM Version:** 6.6.1

**Release Date:** March 2013

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE, QAD 2012 SE, QAD 2012.1 EE, QAD 2013 EE, 2013.1 EE

**QAD CRM Documentation:** *Installation Guide: QAD CRM (78-0927-6.6.1)*, *Administration Guide: QAD CRM (70-3095-6.6.1)*, and *User Guide: QAD CRM (70-3192-6.6.1)* have been updated for this release.

## New and Changed Features

This release of QAD CRM is a maintenance release and includes the following certifications:

- QAD 2013 EE and QAD 2013.1 EE

## Fixes

Internal ID	Fixed Issue Description	Affected Versions
CRMS-47, CRMS-57, CRM-4135	If an Opportunity is created from the CRM All Profile menu, opportunity details are not updated correctly.	6.5.1+
CRMS-65	CRM Prospect record not available error appears when using Material Order Maintenance in QAD ERP.	6.5.1+
CRMS-56	Incorrect cost price in quote details screen after a CRM quote is converted into an order.	6.5.1+
CRMS-61	CRM created sales order has incorrect extended sales margin.	6.5.1+
CRM-3935	Extended field length of "QDoc Schema File location" in CRM to enable longer directory path value, and trim leading space to ensure that the user entered directory can be processed correctly.	6.5.1+
CRM-3951	Validate that only Customer type profile can be assigned as the Bill-to in CRM.	6.5.1+
CRM-3937	Enforce user access permission configuration for the Quick Profile screen.	6.5.1+

# Release Notes for Release 6.6

**QAD CRM Version:** 6.6

**Release Date:** October 2012

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE, QAD 2012 SE, QAD2012.1 EE

**QAD CRM Documentation:** *Installation Guide: QAD CRM (78-0927-6.6)*, *Administration Guide: QAD CRM (70-3095-6.6)*, and *User Guide: QAD CRM (70-3192-6.6)* have been updated for this release.

## New and Changed Features

- This release of QAD CRM supports integration with Microsoft Exchange 2007 and 2010. The system has several enhancements; for example, Exchange public folders are no longer needed for Contact Synchronization.
- The installation is simplified by removing the need to install plug-ins to Microsoft Outlook clients.
- This release of QAD CRM simplifies the e-mail, contact, and activity integration so that you can use these functions through mobile devices.

## Fixes

Internal ID	Fixed Issue Description	Affected Versions
CRM-3997	Upgrade utility fails to launch Progress session when Progress installation folder contains a space in its name.	6.5.1+
CRM-3709	Opportunity > Sometimes Stage Amount in Details is not the total amount of all orders.	6.5.1+

# Release Notes for Release 6.5.1

**QAD CRM Version:** 6.5.1

**Release Date:** March 2012

**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 SE, QAD 2010 EE, QAD 2010.1 EE, QAD 2011 SE, QAD 2011 EE, QAD 2011.1 EE, QAD 2012 EE

**QAD CRM Documentation:** *Installation Guide: QAD CRM (78-0927-6.5.1)*, *Administration Guide: QAD CRM (70-3095-6.5.1)*, and *User Guide: QAD CRM (70-3192-6.5.1)* have been updated for this release.

## New and Changed Features

- This release of QAD CRM supports two types of clients: WebClient and QAD Remote Sales.
- The following image buttons have been replaced with text buttons in CRM windows throughout the application: Save, Undo, Add, Save & Add, Save & Close, Close.
- The Help button has been removed from all the CRM windows. Online help is now only accessible from the Help link on the toolbar.
- In My Settings|Preferences, the following settings have been removed from the General tab: Default program, Last Used Program, Enable PAF, and Configuration File Folder.
- When you shut down QAD CRM, the Remember Settings option is no longer available.
- The Associates shortcut menu has been removed from all activity views.
- In the Make a Note window, the History Notes pane has been moved to the History Notes tab.
- Under the Contact Notes tab in the Make a Note window, some fields have been removed and others rearranged.
- In the Find Profile/Contact window, the Profile History Text and Site Address search criteria have been removed from the left search condition pane.
- The Customer Console search logic has been changed: When you click Search without entering any search criteria, the system now prompts you to enter criteria instead of returning all the records in the database.

## Fixes

Internal ID	Fixed Issue Description	
CRM-3754	Opportunity Stage Date Reminder does not exist.	6.4.4+
CRM-3861	Public Folder Management indicates invalid folder reference for contacts even though the contacts attached to the public folder exist and are valid.	6.4.4+
CRM-3859	The even log displays an error when you attach a profile to a new contact created in Outlook.	6.4.4+
CRM-3802	In Issue Management, profile and contact data fails to update when you change the serial number on some occasions.	6.4.4+
CRM-3744	In Activities All View, start time is not displayed correctly in the current time zone.	6.4.4+
CRM-3740	In All Profiles, editing a contact twice in the Contact Details window freezes the system.	6.4.4+

## Release Notes for Release 6.4.4

**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 SE, 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—the lines that are originally created in QAD CRM and 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. It 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.

### Fixes

Internal ID	Issue (Fixed) Description	
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	
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

The following 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 supports 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 many 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:

- 3** Calls are now referred to as Issues. Buttons and labels have changed accordingly in some screens.
- 4** Exchange Integration now supports multiple Exchange Servers and MS Outlook 2007 certification.
- 5** 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. It 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 recreation works successfully only for approximately 1.5 million records. The AppServer does not successfully support larger data transfers during remote node recreation 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 can 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 these 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** If the folder name contains single or double quotes, QAD CRM Public Folder Management is unable to display public folders. 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 you hide them.

- 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	<ul style="list-style-type: none"> <li>• Microsoft Outlook-style calendar views are now provided.</li> <li>• Task-specific data entry frames. For example, the appointment entry frame is different from the letter creation frame.</li> <li>• Activity records can now be associated with multiple objects—profiles, contacts, users, opportunities, service calls and so on.</li> <li>• Activities can now be assigned a status—Started, Not Started, Complete, Partly Finished, and so on.</li> <li>• Activities can now be scheduled to occur at regular intervals—for example, once a week. A scheduled activity can also be rescheduled.</li> <li>• 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.</li> </ul>
AdminService	<p>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.</p>

Module	Enhancements
Campaigns	<ul style="list-style-type: none"> <li>• Campaign objective, related costs, and potential targets now display on the Campaigns screen. Campaign-related notes can be recorded using the Text tab.</li> <li>• A status can be assigned to each campaign (In Progress, On Hold, Closed, and so on).</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> <li>• 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.</li> </ul>
Contacts	<ul style="list-style-type: none"> <li>• You can now create reminders for birthdays and anniversaries of your contacts</li> <li>• You can now define communication preferences for each contact record.</li> <li>• 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.</li> <li>• You can now easily attach or detach contacts to mailing lists. The management of opt-in and opt-out lists has been enhanced.</li> <li>• 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.</li> <li>• 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.</li> <li>• You can now handpick contacts and attach them to previously defined campaigns. You also can display the campaigns in which a given contact participates.</li> <li>• 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.</li> </ul>
Customer Console	<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>
Customer Service	<p>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:</p> <ul style="list-style-type: none"> <li>• Call Management</li> <li>• Installed Base</li> <li>• Service Queues</li> <li>• CSR Maintenance</li> <li>• Customer Service Settings</li> <li>• Contracts</li> </ul>
Dashboard	<p>Displays a summary of the day's activities, tasks, top profiles, and opportunities. You can display either an individual or a corporate view.</p>
Data Synchronization	<p>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.</p>

Module	Enhancements
Menu Manager	<ul style="list-style-type: none"> <li>• Menus are now organized more logically and menu sections can be enabled or disabled.</li> <li>• 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.</li> <li>• You can now designate the sequence in which programs are run.</li> <li>• You can hide certain menu options if associated databases are not connected, reducing runtime errors.</li> </ul>
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: <ul style="list-style-type: none"> <li>• Integration with Microsoft Outlook</li> <li>• Report settings</li> <li>• Regional settings</li> <li>• Activity settings</li> <li>• Appearance settings</li> </ul>
Profile	<ul style="list-style-type: none"> <li>• The display of activities has been enhanced to provide more information. Activity information now can be sorted easily.</li> <li>• The new Profile Add wizard makes entering data easier through its user-friendly interface. Data is checked when saved to avoid duplicate entries.</li> <li>• Address and segmentation information is now available in a single frame.</li> <li>• You now can allocate both internal and external account managers to a profile depending on criteria entered.</li> <li>• The search feature for profiles has been enhanced to allow searches using alias names instead of normal names.</li> <li>• Script analysis has been enhanced: for a selected profile the new Scripts tab displays the scripts used and answers recorded.</li> </ul>
Reports	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Additional reports in predefined formats are now available. The number of standard reports now available provides better data coverage.</li> <li>• User-defined reports can now be generated. You can use existing templates to create additional reports.</li> </ul>
Users	<ul style="list-style-type: none"> <li>• Module now stores multiple user addresses and telephone numbers.</li> <li>• You can now maintain vacation schedules for users. Different types of vacations are indicated by using colors.</li> </ul>

## 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 canceled.
  - 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 can also 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. Use the Help contents page to navigate to the section you want.
- 13** Although the online Help gets invoked on a Windows 2003 Server machine, it does not display any content in the right pane.

