

Sage CRM 6.1 Release Notes

Who Should Read these Release Notes

These release notes are for Sage CRM Integration Beta participants only.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac, and Softline Accpac CRM.

Date of Release

November 2007.

Version Numbers

Release Version: 6.1

DLL Version: 6.1.0.1

Documentation

All of the following documentation is available with this release in PDF format (except the Online Help which is in HTML format, the Data Management Forms which are in MS Excel format, the Screen Customization Guide which is in MS Word format, and the Data Model which is in MS Visio).

GUIDES	VERSION CODE
Release Notes	
Integration Beta Release Notes	SYS-REA-ENG-610-1.0/INTBETA
What's New	SYS-REL-ENG-601-1.0/INTBETA
Core Guides	
Quick Start Guide	USE-QSG-ENG-601-1.0/INTBETA
User Guide	USE-MAN-ENG-601-1.0/INTBETA
System Administrator Guide	SYS-MAN-ENG-601-1.0/INTBETA
Developer Guide	DEV-MAN-ENG-601-1.0/INTBETA
Online Help	
Context Sensitive User Help <i>(HTML files in the product. Click Help button in Main Menu to view)</i>	USE-HLP-ENG-610-1.0/INTBETA
Context Sensitive System Admin Help <i>(HTML files in the product. Click Help button in Administration to view)</i>	SYS-HLP-ENG-610-1.0/INTBETA
Integration Guides	
Integration User and System Administrator Guide	ERP-USE-ENG-610-1.0/INTBETA
Integration Developer Guide	ERP-DEV-ENG-610-1.0/INTBETA
Modular Guides	
Solo Guide	IMP-SOG-ENG-610-1.0/INTBETA
Self Service Guide	IMP-SEL-ENG-610-1.0/INTBETA
Exchange Synchronization Guide	IMP-EXG-ENG-610-1.0/INTBETA
Wireless Mobile Guide	IMP-WMG-ENG-610-1.0/INTBETA
CTI Guide	IMP-CTI-ENG-610-1.0/INTBETA

GUIDES	VERSION CODE
Web Services Guide	IMP-WSG-ENG-610-1.0/INTBETA
Lotus Domino Synchronization Guide	IMP-LOT-ENG-610-1.0/INTBETA
Advanced Customization Wizard Guide	IMP-WIZ-ENG-610-1.0/INTBETA
Upgrade Guide	IMP-UPG-ENG-610-1.0/INTBETA
.Net SDK Guide	DEV-NET-ENG-610-1.0/INTBETA
Other Documentation	
Screen Customization Guide	IMP-SCG-ENG-610-1.0/INTBETA
Data Management Forms	IMP-FOR-ENG-610-1.0/INTBETA
Technical Specification	SYS-TSP-ENG-610-1.0/INTBETA
Data Model	IMP-DAM-ENG-610-1.0/INTBETA

Known Issues

Case Reference	Description
N/A	<p>The following details Sage CRM v6.1 new install/upgrade compatibility with supported database servers:</p> <p><u>SQL Server</u></p> <p>For supported SQL Server versions 2000 and 2005:</p> <p>Full support for new installs</p> <p>Full support for 64 bit installs</p> <p>Full support for upgrades from CRM 6.0</p> <p><u>Oracle 10g</u></p> <p>Full support for new installs</p> <p>Full support for upgrades from CRM 6.0</p>
N/A	64-bit installs are not supported for Oracle 10g
N/A	Workflow for Quotes and Orders will be supported from 6.1 SP1
N/A	Option 1 for upgrading the Solo Client is not currently working. To work around, use option 2. Please see the <i>Solo Guide</i> for more information

Case Reference	Description
N/A	Solo for ERP Integration is not available. This will be available in 6.1 SP1
332-43628	Solo Client on Vista is not supported
355-51782	If an access violation is returned when creating custom fields, workaround by resetting IIS
261-50802	Unable to use Web Services if Windows authentication is activated on CRM. To work around, please use SQL Authentication to install 6.1
385-48526	An exception page is displayed when you select the Add RuleSet button on the E-mail Address Options screen when working on Oracle 10g
261-49114	Concurrent inserts are deadlocked using web services
261-50306	Web services query method not picking up UTC offset
261-50394	Changing the name of a button group name removes buttons from screen
385-50448	An exception page appears after you delete a screen under a customized tab and click on the Self Service tab. The underlying data is fine, you can ignore this error
261-50744	Groups for new entities contain records that were previously deleted. To workaround, manually exclude these records from the list
135-50804	When a user without reports access expands a dashboard chart, they receive an error on screen
135-51069	When reallocating outbound calls from within marketing, the menu isn't populated as it should be. To workaround, edit the wave activity and re-assign to another user
332-43987	Can't add recurring appointments on Vista with UAC on IE7. To work around, turn off UAC.
261-37915	Company keyword search referencing a person only works on the default person for

Case Reference	Description
	that company.

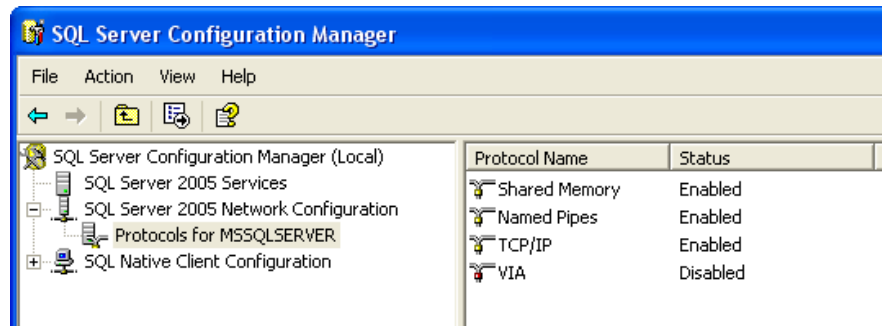
SQL Server Configuration Requirements for Sage CRM Integration

These steps will be added to the *Integration User and Administration Guide* for the 6.1 release.

The following configuration setting is required for MS SQL Server in order to allow setup of the integration service. The screenshots show SQL Server 2005 as an example.

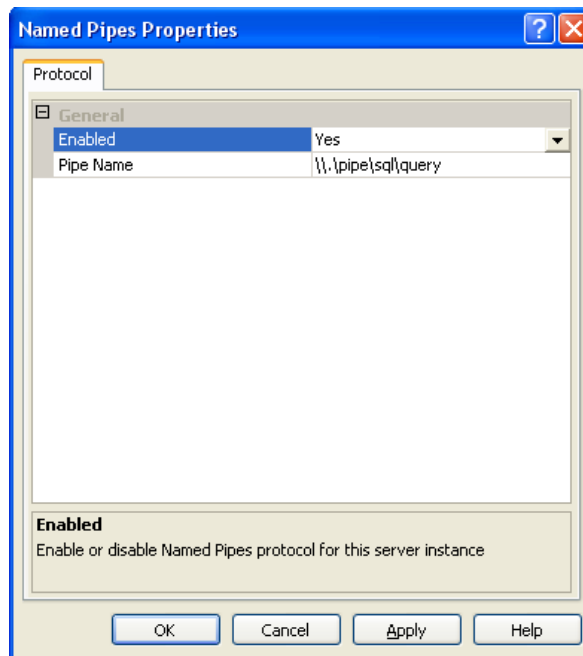
To configure SQL Server for Sage CRM Integration:

1. Open SQL Server Configuration Manager in Start/All Programs/Microsoft SQL Server 2005/Configuration Tools/SQL Server Configuration Manager
2. Expand the SQL Server 2005 Network Configuration and ensure that the Named Pipes and TCPIP are set to Enabled.



SQL Server Configuration Manager

3. If the status is not enabled, double click on the Protocol Name and set Enabled to Yes.
4. Click Apply, and OK.



Named Pipes Properties window

5. You are prompted to restart the SQL Server Service. This must be carried out.

