

Sage Accpac CRM 5.8 Release Notes

Who Should Read these Release Notes

These release notes are for CRM System Administrators, Professional Services and Business / Development Partners.

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

Date of Release

December 2005.

Version Numbers

Release Version: 5.8

DLL Version: 5.8.0.1

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, and the Screen Customization Guide which is in MS Word format).

| GUIDES | VERSION CODE |
|---|---------------------|
| Release Notes | |
| What's New | SYS-REL-ENG-580-1.0 |
| Core Guides | |
| Quick Start Guide | USE-QSG-ENG-580-1.0 |
| User Guide | USE-MAN-ENG-580-1.0 |
| System Administrator Guide | SYS-MAN-ENG-580-1.0 |
| Developer Guide | DEV-MAN-ENG-580-1.0 |
| Online Help | |
| Context Sensitive User Help (HTML files in the product. Click Help button in Administration to view) | USE-HLP-ENG-580-1.0 |
| Context Sensitive System Admin Help (HTML files in the product. Click Help button in Administration to view) | SYS-HLP-ENG-580-1.0 |
| Modular Guides | |
| Solo Guide | IMP-SOG-ENG-580-1.0 |
| Self Service Guide | IMP-SEL-ENG-580-1.0 |
| Exchange Synchronization Guide | IMP-EXG-ENG-580-1.0 |
| Wireless Mobile Guide | IMP-WMG-ENG-580-1.0 |
| CTI Guide | IMP-CTI-ENG-580-1.0 |
| Web Services Guide | IMP-WSG-ENG-580-1.0 |
| Lotus Domino Synchronization Guide | IMP-LOT-ENG-580-1.0 |
| Advanced Customization Wizard Guide | IMP-WIZ-ENG-580-1.0 |
| Screen Customization Guide | IMP-SCG-ENG-580-1.0 |

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| Data Management Forms | IMP-FOR-ENG-580-1.0 |
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Other Guides

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|-------------------------|---------------------|
| Technical Specification | SYS-TSP-ENG-580-1.0 |
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New Installation Path

Note that CRM v5.8 now installs to a default location of c:\program files\sage\crm\<installname>. The email manager service and the crm escalation service are installed to a separate services folder. During a CRM upgrade to 58, the old directories are retained, but custom pages etc. are copied to the new install location.

The CRM library is NOT moved as part of the upgrade, but will continue to function correctly after an upgrade.

Known Issues

| Case Reference Number | Description |
|-----------------------|---|
| N/A | Some e-mail functions, such as using CDONTS and E-Mail Management Server, are not supported on a Windows 2003 Small Business Server operating system. |
| N/A | On an upgrade to a new installation directory, any custom images must be copied manually to the new directory. |
| 92-30578 | Reserved characters, such as quotes, are not supported in block names available in the dashboard. |
| 281-30202 | If you change the Single/Multiple currency mode, you must refresh metadata manually. |
| 92-23586 | Syncing recurring tasks from Outlook to CRM is not supported. |
| 3-23155 | The Advanced Search Select field is not supported on a PDA screen. |
| 135-22056 | By design, saved searches used for Solo cannot be deleted. |

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| 164-17938 | Recent lists are not persistent across sessions on a DB2 database. |
| 0-18959 | By design, scrolling in the top content frame is switched off. |
| 187-30375 | By design, deduplication against another Target list is not available when sending a mass e-mail from an Opportunity or Case list. |
| 69-20698 | Changing a numeric field on an external table to a currency field is not supported. |
