

Release Notes
SalesLogix Version 6.0 Resolved Issues

The following issues have been fixed in SalesLogix version 6.0.

Administrator

1-6184

The state of the close button (the "X" next to the minimize button) is inconsistent. It changes between active and grayed when you move between the following views: Users, System, Teams, Library, DBManager, Bundler, Admin Roles.

1-9484

On the Systems>Offices tab in the SalesLogix Administrator, the last column should read "Library Path" instead of "Sales Library Path".

10000

The USERCOMPANY field must be added to the USERINFO table so the name of the company that the user works for is in the database. This will allow the user to add the company name to their signature.

1-10003

Once the "Insert" / "Note" item in Menu Security is disabled, a user should not be able to add a note from the History tab in the SalesLogix Client. This functionality should be disabled.

1-10526

The International Setting located in the SalesLogix Administrator > Options > System Settings > Names > Styles is intended to parse the last 2 words of a name to the last name. For example, Jerry von Bebbber would be stored with the last name "von Bebbber". It currently behaves as the U.S. setting.

1-15817

When the path of the Library Folder is changed in the Administrator, the change is not available to the Network Client users by solely refreshing the Administrator. You must close, and then open the Administrator to see that path does reflect the change.

1-9045

When creating a new table or field, if you change the table name or field name after the display name field has been populated, the display name will not be updated with the new information.

4921

When installing a bundle, the button options include **No to all**, **Yes, No**, and **All**. This is inconsistent with other Windows applications.

Advanced Outlook Integration

1-13409

If a user is using Outlook offline and they have previously been set up to use the SLX Address Book, after a timeout period of 1 minute, the following error displays: "Database error: Unable to connect: SQL Server is unavailable or does not exist". Then, the BDE connection dialog box opens so the user can select a different database, which has to be cancelled before the user is allowed into Outlook. Adjusting the CONNECT_TIMEOUT is the only other way to avoid the message, but this could cause other problems if it is adjusted. The same setting in Outlook could be used or a new option for the timer could be added to the SalesLogix Address Book.

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1-13731

The Insert > SalesLogix Library, My vCard, and Contact vCard do not appear when Word is selected as the e-mail editor in Outlook XP.

1-14527

In Outlook XP, with Word as the e-mail editor, the "Send Email" button populates the e-mail message with the text of the history record incorrectly. All of the formatting is gone.

1-15094

If the SalesLogix Client is open with no view having focus (Contacts, Accounts, etc.), and the user clicks the "Add contact(s) to Outlook" button, an exception error occurs.

1-15400

The SalesLogix Connector Login window does not have focus when it displays. A user must click on the window to give it focus first instead of just being able to hit the "Enter" key when it displays.

Advanced Sales

1-15505

In SalesLogix versions prior to 5.2, the RMB menu choice for Show Graphical View for sales processes was available in the data grid. If a process was not in focus, the menu choice was grayed out but it was still there. In 5.2, the menu item is not in the list unless the process tree is expanded, and the process in the tree is highlighted. It is only then that the menu item is enabled both in the tree and the grid.

1-8831

When a user creates a new opportunity and adds a sales process, the Opp_SalesStep table does not update if the user deletes the opportunity.

8869

Double clicking outside of the grid view produces an error within the Forecasting component.

Architect

10988

After making changes to a view, a dialog box appears prompting the user to save the changes. If the user chooses not to save, they must click "No" three times in order to close the dialog box and exit Architect.

1-14775

SalesLogix function "IsPhone" is not working correctly in Basic Script.

15296

The 'Name Prefix' and the 'Name Suffix' pick lists sort alphabetically in the client even when the 'Sorted alphabetically' check box is not selected.

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Communications

1-11467

A process that is setup to send an e-mail with an attachment will not attach the file when the message is sent through the SalesLogix Mail Client

1-12793

When an e-mail is received in the SalesLogix Mail Client using GroupWise as the mail system, the following message is received "Error: Could not fill the header: An invalid argument was passed in the function call."

Crystal Reports

1-14815

Crystal Report fails with a Contact group, where the condition of 'accountmanagerid = :USERID' is defined for the group.

1-14884

When running the "Contact Detail" Crystal Report against a group that has two contacts with the same name, only the first contact's detail information displays.

1-15101

When you try to print any of the 3 graphs that may be displayed at the end of the Crystal Report "Potential Sales Opportunities" (when logged on as Lee), a number of error messages appear and the Sales Client closes. If you are logged on as Admin, the graphs print correctly. Workaround: Within the Crystal Report Viewer, before printing the graph for Lee, ensure the Print Setup is set to Landscape. This prevents the errors and the graph prints correctly.

1-20649

Our sample Crystal Reports are not consistent in the way they handle date and currency formatting. Some reports convert date-time to string and others convert date-time to date-time. Currently, you cannot run reports with date filters when your client and database server have different Regional Options. Date Time issues have been addressed in 6.0 as follows: All sample reports have been converted to evaluate Date-Time fields as Date-Times. By doing this, we eliminate the inconsistencies associated with Date-Time strings.

1-6860

There are some Reporting parameters on the Web Client that do not match the LAN Client's Reporting parameters. The items are listed below. The Operating System, Browser, and database platforms are not applicable.

Contact [CRW] Contact Detail - Sample - Everyone> View History Notes>> Not on Web

Account [CRW] Account Detail - Sample - Everyone> View Leadsources>> Not on Web

Account [CRW] Account Detail - Sample - Everyone> View History Notes>> Not on Web

Opportunity [CRW] Opportunity Summary - Sample - Everyone> Include History Notes>> LAN doesn't have this, Web is also not working

History [CRW] History by Contact - Sample - Everyone> Start on a New Page>> LAN doesn't have this, Web is also not working

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History [CRW] History Summary - Sample - Everyone> Start on a New Page>> LAN doesn't have this, Web is also not working

History [CRW] History by Account - Sample - Everyone> Start on a New Page>> LAN doesn't have this, Web is also not working

Activities [CRW] Literature Fulfillment Summary - Sample - Everyone> Fulfillment Status>> Web displays as TEXT input field, key in a value does not work

Activities [CRW] Literature Fulfillment Details - Sample - Everyone> Fulfillment Status>> Web displays as TEXT input field, key in a value does not work

Database

1-15452

The CONTACT_LEADSOURCE table was populated with invalid dates in the CREATEDATE and LEADDATE columns. This causes the table and the UI to display the Delphi "incorrect date value" of 12/30/1899.

1-15908

Many of the e-mail domains in the Eval DB are valid domains. To avoid this, the ".com" for all of the e-mail addresses in the CONTACT table need to be changed to ".demo".

Installs

1-8003

In the Add/Remove programs on a Windows 2000 machine, the icons that are associated with our installs are incorrect. For example, the icon for the Administrator appears as the TranAnalyzer icon.

1-15498

The SalesLogix installation should autopopulate the install path if another SalesLogix product is detected.

Intellisync

1-19923

The Intellisync documentation should be updated to include the following about configuring Intellisync: Intellisync cannot be configured to sync with Outlook when Outlook is in offline mode. When configuring Intellisync, Outlook must be online. Once Intellisync has been successfully configured to sync with Outlook, Intellisync can be run with Outlook either offline or online.

Mail Client

1-6500

When an Opportunity Detail view is opened in SalesLogix and a user sends an e-mail in the SalesLogix Mail Client, a record of that e-mail is recorded in the Notes/History section of that Opportunity, even though the e-mail that was sent has nothing to do with that Opportunity. This happens even if the SalesLogix Client is minimized.

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Marketing

1-16130

When a user creates a campaign and adds a contact response, a Basic error occurs when no Target Audience is entered.

Remote Client

1-9570

New contacts are not showing up in the 'What's New' Contact tab.

Reports

1-76

SalesLogix Support Reports should contain filters like SalesLogix Sales.

Sales Client

10641

When the user opens the dialer, and then clicks on the Dialing Properties or Connections tab, the Personal and Activity Pad buttons disappear, which is the correct functionality. But, if the user is currently on the Where to Dial tab and chooses Tools>Connections or Tools>Dialing Properties the buttons should appear and do not.

1-10232

When user "A" assigns a contact process to user "B" and that contact process starts with a Question, user "A" is the user prompted for the question, not user "B" to whom the process was assigned.

1-11319

Lookup results appear behind Calendar, Activities, Library, Reports and Process views.

1-14105

Processes that are setup to send an e-mail with a file attached, do not attach the file.

1-14861

If the Activity Alarm dialog box opens while the user is editing notes, and they select Snooze, the text added to the note disappears.

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1-15119

Insert>File Attachment opens up the 'Select' view, allowing the user to choose a file to attach. Clicking the Cancel button in this view should end the attachment process. However, cancelling this view opens up the Add Attachment For: view.

1-16548

Calendar Reports does not display properly. The Overflow Page does not word wrap and the text is cut short at the end of one line.

1-16888

The data grid in the new Notes/History view displays dates in a dd/Month/Yr <time> format. For example, 28-Nov-2001 2:30 PM. This is inconsistent with dates as displayed in other parts of the client, and even in the longnotes field of the same view. The standard is mm/dd/yy, so logically the date should display as Nov-28-2001 <time>.

1-17947

When a contact process containing a Word e-mail fails, a History record is written that doesn't indicate that the e-mail failed (unlike in SalesLogix v4.1)

1-19729

The user that an Ad Hoc group is released to is unable to add a Contact to that group.

1-6897

The vertical scrollbar does not work correctly in list views. When there are more records than can be displayed in the view and the vertical scroll bar is moved, it jumps back to its previous location. If it's moved past the half way point, it jumps to the half way point.

1-8931

A non-admin user cannot run Crystal Report 'Support Account List by Weight' from Sales Client.

1-9088

Activity Conflict message appears even though "Check Availability" is deselected in the Tools>Options>General Tab.

8093

On the Reports View, the reports are not sorted in alphabetical order (by report type and Name) within the tree. Currently they display in the order they are stored in the database. A user should be able to add sort by report name within type under each of the categories (Contact, Opportunity, Account etc...).

8437

When in the Activity Detail view, if no activity is selected, there is no prompt to select an activity.

8721

When in Contact, Account, or Opportunity list view and the user double clicks to "keep" the record found, and then clicks OK, the list view disappears.

8963

When the X in the Exit Confirm view of the Activity Notepad scenario is clicked, both the Confirm view and the Activity Note Pad view close.

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1-6780

In the Purge Wizard, if a user purges according to a value in a \$ field, and uses a comma in this field, error messages display. If a comma is not permissible, an informative message to that effect would be less alarming than the error messages.

Services

1-14816

When the location of the SyncServices.cfg file is changed in the Administrator and the service remains on the same machine, the registry entry for the location of the SyncServices.cfg file is not changed. It continues to use the old file if it is available, or the service runs without any jobs running if the old file is not still available.

Support Client

1-11498

On the Call Turn-Around Analysis report, the Actual Time Open field is not calculating properly. It is calculating in days but should be calculating in hours.

1-12116

On the Ticket List view, the tickets are not listed in the correct numerical order. Also, when you select the Ticket ID column heading, it does not sort properly.

1-14489

In the Ticket Detail view, when any tab is clicked it is not saving. For example, when a new ticket is created and a user clicks the Contracts tab before clicking Save, the Contract does not appear in the data grid. The Ticket Detail view should be saved when any of the tabs are selected.

1-14722

A program error appears after exiting the Support Client.

1-15180

In the Support Client, if a user has a contract with the "Begin Contract After First Ticket" checkbox selected, a warning is received when making that contract the active contract on the Ticket detail window.

1-15583

When creating a new defect or editing a defect activity, and then changing the Received Date, the current date still displays in the Defect Detail Activity tab view. If you open the activity, the date is correct, but it does not display correctly on the Defect Detail Activity tab.

1-15689

On the Lookup Account Product window and the Lookupmareceivedproduct window, you cannot search when you type information in the search field. The search comes back empty. If you do not enter any information in the field and search, information does appear. User should be able to enter information in the search field to narrow down the search.

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1-15902

If an Account is deleted in the Sales Client or the Support Client, all Tickets tied to that Account are deleted too. There should be some way to keep the Tickets as a history.

1-16305

A Runtime error appears when inserting a new ticket if the value in the hours field on the Urgency Alert dialog box is larger than 540 hours.

1-17335

When a users does a lookup using a certain field, and then clears that field and uses a different field for the lookup, the Support Client uses both fields to filter the results of the search. The Client should clear the field and only search on the new data entered.

1-17710

The wording on the Default Owners Tab under User Options is not correct. It should read as follows: These settings control who owns Accounts and Defects when they are first created by you.

1-17715

On the Tools>Manage>Auto Assignment window the Owner column label should be changed to Assigned To because the value of that column is not the owner but the person assigned to that area.

1-17798

When a user creates a new contract, and then adds a product from the Product tab, the product does not display in the data grid. If the user attempts to add the product again, it still does not display. If the window is closed, and then opened the product will display (multiple times if it was added more than once). Pushing F5 will display the product and any further products added will display when they are added.

16305

Ticket QBE labels are inconsistent with Ticket Edit view. The Ticket QBE fields Reported By & Reported Date fields should be Received By & Received Date on the Ticket Edit view.

1-80

Ticket view > Urgency field has a pick list icon but brings up a Lookup. This is inconsistent with the rest of the application.

1-8787

The Group Manager in the Support Client displays the Opportunity family. This should not appear since Support does not use Opportunities.

1-8938

The Bundle Info button is missing from the Help About screen.

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Sync Server

1-12323

There needs to be a Sync Server specific Help that will get installed with the Sync Server. All Sync Server related topics from the Administrator Help should be included in the Sync Server Help.

1-14814

If a user modifies the location of the SyncService.cfg file in the Administrator>Sync Automations Services tab, it writes a new record to the SYNCSERVICEFILE table. Customers have reported that this sometimes causes the SyncService to fail. If they delete the old row from the database, and then restart the service, it runs without a problem.

Synchronization

1-14596

In the Monitor Console dialog box, the user should have right mouse functionality. It should only work when a selected service is highlighted and it should contain all values from the File menu.

1-14597

In the Monitor Console, if there are two or more services being monitored, it always takes about ten seconds for the second service to switch from red to green. All others turn green right away.

Ticket Activity

1-17741

When a user opens a ticket from the Account Detail view, and then looks up a different account's ticket using the search on AlternateKeySuffix (Ticket ID in the view), makes changes to the second ticket, then saves the ticket by closing it with the X, it appears incorrectly in the first account's ticket list.

Web Client

1-10018

Web> Add an Opportunity> Quantity field allows unlimited number of characters to be entered. After 14 characters, the number rounds in the Enter Product Pricing view> Quantity field.

1-10022

Add a Note> Duration field> should not be able to have a duration that is less than 5 minutes on the noteadd1 template.

1-14822

When scheduling an activity and setting Every X Weeks, the Web Client ignores the number of weeks if more than one day of the week is selected.

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1-14841

In the Event Edit view, the Reset button changes the Day Type field to "/blank" instead of the previously saved value.

1-14864

After an alternate address is added to the Contact or Account Addresses tabs, and the user returns to the tab view, the alternate address does not display until the view is refreshed.

1-15390

Web Client> Calendar> Day & Week Views> Timeless Personal Activities do not display Contact/Account info (if present).

1-17822

In the Template> Download Tools> SlxWordTools.dot, the macro for the SLXInsertFields is not 'installing'. This happens when a virus macro checker, from a 3rd-Party product, is loaded on the environment. It strips the macro from the SlxWordTools.dot.

1-17860

Web Client> Contact or Account> Address tab> Updating Primary and Mailing fields result in inconsistencies in database. Positive values posts as 'T' and sometimes as 'Y' and negative values can post as 'F' or 'N'. Values should post as 'T' or 'F'.

1-19215

Activity Manager does not display the correct count of overdue activities as it does on the SalesLogix Client. This should be consistent between products.

1-19307

The Event time is posted incorrectly for a user who's day Start/End time is other than the 9AM-5PM default setting.

1-19312

When a user creates a note on the Contact or Account Detail view, focus is returned to the What's New view instead of the Contact or Account Detail view from which it was created.

1-20591

When a user schedules a contact process in the Web Client, the Process Owner is written to the database as the user logged in, not the user selected.

1-8039

On the Template Tools Download view, the information on step one regarding the Word Template location is not correct. The location will vary by Operating System and the Microsoft Word version. The step should read:
1. Right-click SLXWordTools.dot, then select Save Target As SLXWordTools.dot in your Microsoft Word templates folder. ***To find the default location, open Microsoft Word. On the [Tools] menu, select [Options]. On the [File Locations] tab, select [User Templates], and click [Modify] to view the path. An example for Windows 2000/ Word 2000 is: C:\Documents & Settings\<username>\Application Data\Microsoft\Templates***

1-8939

On the Web Client> Add an Opportunity> Step 2d > Product Summary > "Actual Close Date" field if the "Edit Pricing" button is selected and the method is "Available Pricing Levels", and the user returns to the Product Summary view, the Actual Close Date field is autopopulated with the current date and time.

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1-8943

Mail > 'Merge with' tab, clicking any of the 'Find' buttons will open a list view in the lower frame. If there has been an Ad-Hoc Group in the tabs displayed and the user clicks this group, nothing will happen. The list stays on prior 'tab' list. Mail Merge does not recognize the Ad-Hoc Groups.

1-8945

Add an Opportunity>"Close Probability" field allows numbers greater than 100. A message should display immediately if invalid characters are entered stating that the "The close probability cannot be greater than 100%".

1-9199

Invalid times (Hour = 13-99 or Minute = 60-99) entered into the 'Edit an Activity' view display as 12:00AM and posts to the database without a time in the STARTDATE field upon 'Update'. Other views edit and display an 'invalid start time' error message and don't post to the database.

1-9472

Web Client> Find a Product> Family and Group custom text fields blank out after 'Find' button is selected.

Web DLL

1-18515

Web DLL> Admin?Command> cacheon/cacheoff>> The 'cacheon' & 'cacheoff' administrative commands are currently not working.

Web Manager

1-14442

SDK > Option Explicit is not working properly in the Web Client action.

1-8857

When creating a Web query, if the query has more than one Condition/Sorting set and you edit it too many times, any additional Condition/Sorting sets seem to disappear.

Web Reports

1-15398

Web Client > Web Reports > Report Groups > Contacts>> Web and LAN queries differ.

WebTicket Employees

1-6586

WebTicket doesn't work properly when using international date settings such as dd/MM/yyyy.