CRM

VERSION RELEASE NOTES

CRM Version List:

[3.6.2.3] [3.6.1.9] [3.6.1.3] [3.6.0.5] [3.5.8.6] [3.5.7.5 Fix] [3.5.7.5] [3.5.6.6 - 3.5.6.7] [3.5.6.5] [3.5.6.4] [3.5.6.3] [3.5.6.2] [3.5.6.1] [3.5.6.0 Upgrade] [3.5.6.0] [3.5.5.1] [3.5.5.0] [Performance Patch 2 (03/12/2018)] [Performance Patch 2 (07/11/2018)] [Hotfix Release (05/11/2018)] [Performance Patch (05/11/2018)] [3.5.3.7] [3.5.3.6] [3.5.3.5] [3.5.3.4] [3.5.3.3] [3.5.0.2] [3.4.6.0] [3.4.5.1] [3.4.4.0] [3.4.3.1] [3.4.3.0] [3.4.2.0] [3.4.1.0] [3.4.0.0]

3.6.2.3 (22.08.2022 10:30 AM)

- **Release Priority**: Medium
- **Database Prerequisites**:
  - BPO v2.3.0.3 or later.
  - o CRM v3.6.1.9
  - o SQL Full-Text Indexing must be installed on the BPO SQL Server instance.
- **Application Type**: BPO Companion Applications – Web Service and Web Application

Modifications and Updates

- Resolved a bug where editing and saving without setting the Exchange sync password, saved the correct password to the database but incorrectly updated the in-session Exchange password to an empty string. If settings were saved again during the same session, the empty password would be saved to the database.

- Resolved a Merge Customer issue with ContactID not belonging to Customer which was introduced by new validation added to CRM.
- Improved the sorting of search results.
- Resolved an issue where a salesman's customer list would still include customers that were deleted from a customer group or where the customer group was deleted.
- Resolved an Exchange sync error that occurred when closing activities where the only attendee had the same email address as the Exchange sync account.
- Corrected sproc sp_bpoGet_CRM_SALSCustomers to find partial word matches in the customer search.
- Resolved an issue where adding related customers to activities prevented the activity subject from saving.
- Resolved an issue with searching using an empty search term.
- Resolved an issue caused by entering an integer into the Cold Call Contact Name field.
- Resolved an issue on the Save Customer form where the Country dropdown arrow did not show for shipping addresses.
- Resolved the Pipeline Summary stored procedure to support long Case State descriptions.
- New end point GetPeriodOpenActivities added to BPOCRMWebService for SalesConnect.
- Resolved an invalid date format error when sending activity invites to activity attendees from MaintainActivity, NextActivity and CreateColdCall screens.

Rollout Details

- Run the BPO_CRM_v3.6.2.3 upgrade, and check for errors in the results file.

- Run the CRM_v3.6.2.3 Validation, and check that there are no errors.
- Install BPOCRMWebService-3.6.2.3-Release.
- Install BPOCRM-3.6.2.3-Release.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_CRM\v3.6.2.3

3.6.1.9 (14.01.2022 4:23 PM)

- **Release Priority**: Medium
- **Database Prerequisites**:
  - BPO v2.3.0.3 or later.
  - SQL Full-Text Indexing must be installed on the BPO SQL Server instance.
- **Application Type**: BPO Companion Applications – Web Service and Web Application

BPOCRM v3.6.1.9 MODIFICATIONS

- CR 160 – CRM can now sync activities to calendars on Microsoft accounts which have 2 Factor Authentication enabled. Microsoft Exchange synchronisation with 2 Factor Authentication (2FA) requires the use of Microsoft App Passwords. In these cases, an App Password must be created in the user's Microsoft Account and this password should be used as the Exchange synchronisation password instead of their standard account password. See https://support.office.com/en-gb/f1/topic/manage-app-passwords-for-two-step-verification-d6dc8c6d-4bf7-4851-ad95-6d07799387e9 for details and instructions.
- Added on screen display/notification of activity Exchange synchronization results. Due to the asynchronous nature of this

process for performance reasons, the notification will only display on the next page after synchronization.

- Updated jQuery to version 3.6.0 and jQuery UI to version 1.13.0.

FIXES AND UPDATES

- DBN0111159 – CRM Web Service required an update due to Unicode characters appearing in SalesConnect when using special characters in the activity subject and note fields.
- DBN0116751 – Updated CRM SQL objects to prevent truncating the customer’s name when the length of the string is more than 50 characters when creating a new customer or searching for a customer in CRM.
- DBN0116986 - Activated invalid character message to notify user if they enter invalid characters in the customer’s name when the customer name control loses focus on Cold Call and Maintain Contact forms. This error prevented the user from processing the rest of the form.
- DBN0121929 – Fixed an ‘Input String Was Not In A Correct Format’ error in the log files when the user logged into CRM.
- DBN0121933 - Fixed an issue in a recent Chromium based browser update causing Options in main user menu to remain hidden when menu is re-opened.
- DBN0122482 – When a related customer is selected while creating a cold call, and ‘Show customer after save’ is unselected, an ‘Index was outside the bounds of the array’ error was thrown upon clicking save. This error has been fixed.
- DBN0122809 - When creating a cold call and the user adds a related customer and then removes it, an ‘Index was outside the bounds of the array’ error was displayed in the log files. This issue has been resolved.

- Changed activity sorting to descending Schedule Start date and time.

Rollout Details

- Run the BPO_CRM_v3.6.1.9 upgrade and check for errors in the results file.
- Run the CRM_v3.6.1.9 Validation, and check that there are no errors.
- Install BPOCRMWebService-3.6.1.9-Release.
- Install BPOCRM-3.6.1.9-Release.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_CRM\v3.6.1.9

3.6.1.3 (16.07.2021 4:58 PM)

- **Release Priority**: Medium
- **Database Prerequisites**:
  - BPO v2.3.0.x or later.
  - SQL Full-Text Indexing must be installed on the BPO SQL Server instance.
- **Application Type**: BPO Companion Applications – Web Service and Web Application

FIXES AND UPDATES

- Fixed date format compatibility issue in JSON data tables.
- Fixed bug where Case Types lists contained Case States in specific scenarios.
- Removed web.config setting that specified en-ZA culture in BPOCRM site.

- Set BPOCRM Culture ShortDateFormat to BPO ISOCultureFormat and TimeFormat to HH:mm:ss.
- All end points date string parameters must be in format yyyyMMdd.
- Fixed issues where certain date formats errored with Greek, Bulgarian, Russian, German, French, Danish, Spanish, Italian, Dutch, Norwegian, Portuguese, Finnish, Czech, Polish, Romanian, Turkish, Estonian, Brazilian.
- Fixed alphabetical ordering of customers list in Customer Group Merge.
- Improved validation when editing Stage Gates to prevent incompatible input.
- Fixed bug where Activity and Warning lists did not refresh when clicking refresh button.
- Improved event log data. Added audit entries for file downloads and removed unnecessary test log entries.
- Fixed column alignment in Stage Gates maintenance form.
- Fixed issue where ampersand character was being converted to ascii code.
- Fixed overflow on activity listing where single words wider than the width of the screen were causing the context tiles to be hidden.
- Fixed issue where salesman's signature without an image did not save.

Rollout Details

- Run the BPO_CRM_v3.6.1.3 upgrade, and check for errors in the results file.
- Run the CRM_v3.6.1.3 Validation, and check that there are no errors.

- Install BPOCRMWebService-3.6.1.3-Release.
- Install BPOCRM-3.6.1.3-Release.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_CRM\v3.6.1.3

3.6.0.5 (07.05.2021 5:02 PM)

- **Release Priority**: Medium
- **Database Prerequisites**:
  - BPO v2.3.0.x or later.
  - SQL Full-Text Indexing must be installed on the BPO SQL Server instance.

CRM v3.6.0.5 and Web Service v3.6.0.5 MODIFICATIONS

- CR 72 - Changes made to CRM to support ISO Culture date formatting. The inclusion of ISO Culture date formatting is to allow customers with different SQL date formatting to utilize CRM without encountering date formatting incompatibilities.
- CR 75 – Customer search output screen to bring back shipping addresses against customers. Search will now include shipping addresses. Search results will display in the same format as currently with the addition of the Addresses field.
- CR 76 - Universal search function to enable users to search for addresses. Returned results must bring back customers and contacts that are linked to the specified address. These changes will see the introduction of full text indexes on the searched tables and the use of these indices should improve the search performance.
- CR 117 - When adding an item to a quote, there are two fields that are displayed that can be confused with one another (Current

stock on hand and the ItemID). Default columns now exclude the Item ID (#) column. The Quote Available Items drop-down columns are now configurable in BPO Configurator > Grid Captions maintenance form.

FIXES AND UPDATES

- Prevent editing and copying of complex Sales Studio quotes in CRM.
- Hardcoded support for latest strong encryption protocols in Exchange Sync to eliminate need for registry updates.
- Updated User Interface search to support searching for phrases by wrapping search text with “”.
- Fixed issues in database objects for getting salesman’s customers and general search.
- Fixed bug where inactive employee could still log in to CRM.
- Resolved in 3.6.0.2. Customer groups page does not search addresses as these are not displayed and would create confusion.
- EWS Exchange version defaults to latest supported API version which resolves Exchange rescheduling error.
- Resolved password validation logic when user attempts to update their BPO password. Error message indicates exception if user inputs incorrect current password and user is returned to the settings form with unsaved changes.
- Resolved issue related to editing large email signatures, most affected by image file size. Image file size has been restricted to 1MB and exception is thrown preventing user from saving an oversize signature.
- Resolved issue when adding a new contact and changing the customer triggered validation errors on contact fields.
- Fixed issue where salesman could not edit a customer, they should be able edit.

- CRM now supports viewing complex sales proposals from Sales Studio.
- Resolved issue with some quote fields not saving from MaintainActivity form.
- Fixed issue for cancelling synced Exchange appointments when the activity is closed in CRM.
- Process sync trigger has been added to other pages to facilitate near real-time syncing of activities.
- Grid view cookies are cleared at user login if a different version of CRM is detected. Includes grid columns, filters, pages sizes etc that were cached by a previous version of CRM.
- Resolved issue where salesman was not allowed access to new customer immediately after creation via Cold Call and Add Customer/contact pages.
- Changed Schedule Reminder to only allow values from 0 to 1000.
- Changed Activity Listing filter columns to a search panel.
- Fixed email issue to allow more than 8000 characters in message body.
- Fixed issue where contact attendee for new customer contact was causing an exception on the Cold Call screen.
- Fixed issue where Customer Group was not removed from lists after being deactivated in a Customer Group Merge.
- Fixed alphabetical ordering of customers list in Customer Group Merge.
- Added user interface control to prevent users selecting the same source and destination Customer Group for merging. Also disable Merge buttons on Customer Group Merge and Customer Merge if selections are invalid.

Additional Notes

- SQL Full-Text Indexing must be installed on the BPO SQL Server instance.
- Tickets regarding CR72 functionality using foreign languages have been deferred for now. British English SQL language should work fine for CR72 functionality.

Rollout Details

- Run the BPO_CRM_v3.6.0.5 upgrade, and check for errors in the results file.
- Run the CRM_v3.6.0.5_Validation, and check that there are no errors.
- Install BPOCRMWebService-3.6.0.5.
- Install BPOCRM-3.6.0.5.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_CRM\v3.6.0.5

3.5.8.6 (30.10.2020 5:02 PM)

Rollout Priority / Requirement

- Low global client rollout priority
    - Related to clients who:
        - Upgrading from BPOCRM v3.5.7.5

Application Version Compatibility

- Compatible with:
    - BPO2 v2.2.0.1 or later.

v3.5.8.6:

- Updated sp_bpoGet_CRM_SALSSalesTeamMemberships to get all groups if salesman has Sales Assistants Sales Role.
- Updated sp_bpoGet_CRM_SALSTargetVsActual to exclude Rejected quotes.
- Fixed web service Save Code parameter name bug preventing updates in Configuration of Case States.
- Converted date fields to date datatype so that fields sort by date value instead of alphabetically on Quotes, Contracts and Equipment screens.
- Blocked editing of Sales Studio quotes in CRM. Edit link is disabled in quote listing and editing is also blocked on the Maintain Quote form.
- Modified Quote Listing screen Quote Value column to display quote currency value and added new column showing Base Currency Value to allow meaningful comparisons between quote values.

v3.5.8.5:

- Fixed issue where Admins and Super Admins could not reject Recommendations that they should be able to and limited customer recommendations to only show recommendations relevant to current salesman dependent on Sales Role and subordinates.
- Third Party grid layout misalignment resolved.
- Fixed issue of some fields not saving on Maintain Contact (Customer) after expanding Custom CRM Data section.
- Version info added to report database objects.
- Added missing CustomerID parameter to hyperlink URL on Equipment listing that prevented report from displaying.
- Fixed issue where emailing failed if salesman's DefaultSite is 0 (for all sites).

- Fixed issue where Accept Quote page errored and did not update dashboards.
- Resolved Case listing screen layout and replaced the column headers and filters with a Search Panel.
- Fixed issue with employee names being cut on Salesmen Monthly Targets screen.
- Sales Assistants can only edit Customer Groups on New customers.

v3.5.8.4:

- Salesman and Customer Machines and Contracts data is now stored temporarily in a session variable to improve performance when paging results. These Session data variables get cleared when returning to Home and Customer page.
- Moved shared data lists from Cache to Application store to prevent deletion of lists by Cache management process.
- Fixed issue of missing Case Types in dropdown lists.
- Fixed issue where Salesman's Sales Role Membership returned inactive Roles.
- Admins can now view and select subordinates' Sales Teams/Groups.
- Super Admins can now view and select subordinates' Sales Teams/Groups.
- Set minimum Rank Call Cycle to 1 day.
- Administrators can assign any groups they belong to or their subordinates belong to, to the customer.
- Super Admins can assign any groups to a customer.
- New security rights created:
    - FRMMAINTSALESTEAMS - CRM Form: Maintain Sales Teams/Groups (MaintainSalesTeams form)

    - FRMMAINTCUSTSALESTEAMS - CRM Form: Maintain Customer Sales Teams/Group Memberships (Cold Call and Maintain Contact forms)
    - FRMMAINTCUSTSALESMEN - CRM Form: Maintain Customer Salesmen (Cold Call and Maintain Contact forms)
- Fixed Reject Recommendations form. Super Admin can reject any recommendation. Admin can only reject for subordinates.
- Fixed bug where email settings did not display on Report Viewer form.
- Fixed issue where document names were not set for certain document types.
- Updated NetReports to generate secure PDF documents in CRM.
- Third Party column filter row replaced with search box.
- Changed method of reading submitted form values to improve reliability.
- Stripped superfluous technical details from error messages to display more user-friendly information.

v3.5.8.3:

- Changed log file date format to yyyy-MM-dd HH:mm:ss.
- Sales Administrators and Super Admins sales roles are not allocated automatically by triggers but will be automatically deallocated by triggers if the salesman's employee status changes and they no longer meet the relevant criteria.
- Added trigger to tblCRMSalesRoles to prevent invalid Roles being given to Salesmen.
- Exclude Rejected quotes from CRM Pipeline.
- Customer Codes for new customers are generated by the BPO stored procedure to ensure codes comply with BPO standards.
- Fixed issue where Case Percentage not set on Cold Calls.

v3.5.8.2:

- Added missing DevExpress files to BPOCRMWebService installation.
- Fixed 0% complete on customer listing.
- Updated migration scripts for allocating salesmen SalesRoles as well as triggers to allocate Sales Roles when employee or salesman gets inserted or updated.
- Improved error message referring to Sales Teams when creating duplicate sales groups.
- Fixed stored procedures calculating the rental amounts and dates.
- Removed ability to add negative numbers on Third Party Maintain form.
- Added missing customer info captions on Salesman Customers Equipment listing.

v3.5.8.1:

- Added missing DevExpress.Web.ASPxTreeList.v18.2 to BPOCRM installation.
- Fixed Object reference not set to an instance of an object on Customer Maintain screen.
- Remove error raised if CustomerID of 0 provided for customer team memberships in sp_bpoGet_CRM_SALSSalesTeamCustMemberships.
- Removed incorrect report object reference to sp_bpoGet_CRM_SALSThirdPartyReport.
- Fixed field name, fldCaseSalesmanName, in sp_bpoGet_CRM_SALSCustomerCases.

v3.5.8.0:

- Base reports for CRM 3rd Party Information. (CR38)
- Salesmen to be able to add customer groups when loading a new customer in CRM. (CR38)
- CRM Administrators require additional rights to modify cases, activities and quotes created/owned by other salesmen. (CR38)
- Error handling when user attempts to create duplicate sales group name. (CR38)
- Adding Contract Rental Fees to Equipment listing page. (CR38)
- Fixed issue where Case Salesman list did not populate if case was edited by an employee who is not the case salesman.
- Added Case Salesman to Activity listings.
- Exchange sync now gets Exchange version from the server so the MS Exchange version setting is no longer required.
- Exchange Sync moved from client side AJAX call to server side asynchronous call.
- Removed Parts List from preloaded cache data to only load on demand when settings form is loaded for the first time. Thereafter Parts list will remain in server cache.

Rollout details

- Install BPOCRM_v3.5.8.6
- Install BPOCRMWebService_v3.5.8.6
- Run the BPO_CRM_v3.5.8.6_Upgrade_v1.0.0.2 upgrade
- Run the CRM_v3.5.8.6_Validation and check for errors
- \Implementations\CO3_Releases\Applications\BPO_CRM\v3.5.8.6

3.5.7.5 WebService Installer Fix Release (12.06.2020 5:38 PM)

- **Rollout Priority**: Low
- **Database Prerequisites**: BPO2 v2.2.0.1 or later and BPOCRM v3.5.7.5

UPDATED BPOCRM V3.5.7.5 WEBSERVICE INSTALL FILE

- A new BPOCRM WebService v3.5.7.5 install file has been released to resolve the issue where DevExpress.DataAccess.v18.2.dll and DevExpress.Pdf.v18.2.Core.dll files were installed in the incorrect application folder.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_CRM\v3.5.7.5\BPOCRMWebService_v3.5.7.5_Installer

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3.5.7.5 (13.03.2020 4:38 PM)

Rollout Priority / Requirement

- Low global client rollout priority
  - Related to clients who:
    - Upgrading from BPOCRM v3.5.6.7

Application Version Compatibility

- Compatible with BPO2 v**2.2.0.1** or later

v3.5.7.5:

- Added BPO activation validation to ensure customer has valid BPO activation.

- Added customer groups to manage salesmen access to customers and allocation of multiple customers to multiple salesmen and vice versa.
- Added Customer Groups tile to Home screen for salesman to see their groups and access the customers in those groups from the page.
- Sales administrators have full access to all customers.
- Added Contracts tile to Home screen.
- Added Turnover Value, GP Value, Monthly Rental Value and Monthly Service Value fields to Cases.
- Added customer group merging to merge a source group into a destination group. The source group is deactivated after the merge.
- Added customer merging to merge selected data on a duplicate customer into a primary customer. The duplicate customer is deactivated after the merge.
- Added checkbox to Maintain Activity, Next Activity and Cold Call forms to indicate if Case Contact should be included as an employee.
- Made Case Contact an optional attendee that can be removed on Maintain Activity, Next Activity and Cold Call forms.
- Fixed issue where activity employee attendees could not be removed.
- Email invites no longer created for Case Contact if they are not an attendee.
- Users not allowed to edit customer name and primary customer info in CRM if the customer is in “Active” state in BPO.
- Fixed issue where customer commercial was no longer set to customer’s commercial when creating a quote.

- Fixed issue with context tiles being hidden irrespective of user rights on Third Party listing screen.
- Fixed issue where deleted customers still displayed in Cold Call search even if ExcludeInactiveInSearch setting was set.
- Improved performance of customer listing stored procedures.
- Fixed customer grid column alignment.

Rollout details

- Install BPOCRM_v3.5.7.5
- Install BPOCRMWebService_v3.5.7.5
- Run the BPOCRM_v3.5.7.5_Upgrade_v1.0.0.0 upgrade
- Run the CRM_v3.5.7.5_Validation and check for errors
- Implementations\CO3_Releases\Applications\BPO_CRM\v3.5.7.5

3.5.6.6 - 3.5.6.7 (13.12.2019 11:36 AM)

Rollout Priority / Requirement

- Medium global client rollout priority
  - Related to clients who:
    - Are using BPOCRM v3.5.6.5
    - Upgrading from BPOCRM v3.5.6.0

Application Version Compatibility

- Compatible with:
  - BPO2 **v2.2.0.1** or later

v3.5.6.7:

Functionality Changes / Fixes:

- Modified code to get WSDL from file instead of compiled resource.
- Modified sp_bpoGet_CRM_SALSSearch for compatibility with pre MS SQL 2017.
- Modified sp_bpoGet_CRM_SALSAvailableQuoteItems for performance improvements.

v3.5.6.6:

Functionality Changes / Fixes:

- Fixed bug with getting Case States data list in cache.
- Updated BPOCRMWebService WSDL resource in BPOCRM.
- Added more error catching and logging in end point processing functions to get better exception handling and logging information.
- Modified Logging methodology to log to a global in-memory buffer that that get periodically written to the log file to prevent log file access violations and potential memory overflow.
- Modified search stored procedure to improve performance by limiting source records to CRMCustRowsLimit in sp_bpoGet_CRM_SALSSearch.
- Addressed a few object reference errors.

Rollout details

- Install BPOCRM_v3.5.6.7
- Install BPOCRMWebService_v3.5.6.7
- Run the BPOCRM_v3.5.6.1-v3.5.6.7_CombinedUpgrade_v1.0.0.0 upgrade
- Run the CRM_v3.5.6.7_Validation and check for errors

- Implementations\CO3_Releases\Applications\BPO_CRM\v3.5.6.1-v3.5.6.7

3.5.6.5 (01.11.2019)

Rollout Priority / Requirement

- Medium global client rollout priority

Application Version Compatibility

- Compatible with BPO2 **v2.3.0.4** or later

Functionality Changes / Fixes:

- Changed visible fields when clicking reschedule activity.
- Modified Quote fields that get validated on MaintainActivity form to only validate if required.
- Added missing DevExpress dll's required by BPOCRMWebService reports.
- Modified fn_bpoGet_CRM_SALSCustomerMachineAvgMonthlyCopies to handle averages for contracts that started in the current month.

Prerequisites:

- BPO Database objects

Upgrade Notes:

- BPOCRM_v3.5.6.5 Upgrade Script
- Install BPOCRM_v3.5.6.5
- Install BPOCRMWebService_v3.5.6.5

- Run the CRM_v3.5.6.5_Validation tool to check for object version errors

Known Issues:

- DevExpress issue on MaintainActivity screen when required fields have not been set before expanding quote fields, these do not get saved to the activity.
- Copy Quote – if the customer is not selected (which is a mandatory field), on save – object reference not set to an instance of an object (previously existing issue).

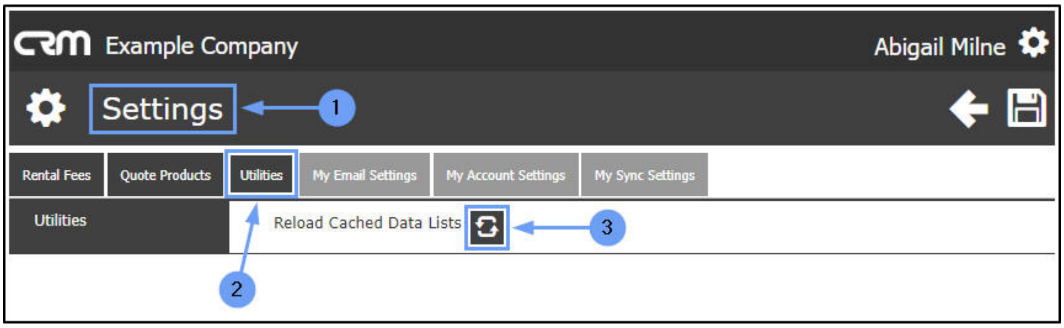
3.5.6.4 (01.11.2019)

Functionality Changes / Fixes:

- Added BPO activation validation to ensure customer has valid BPO activation.
- Fixed issue where customer commercial was no longer set to customer's commercial when creating a quote.
- Improved data parsing and exception handling to improve performance.
- Recommend setting CRMQuoteAvailItemsRowsLimit to 100 items or less to improve quote screen performance. Higher than this is impractical, as the long dropdown list makes it difficult to find items and negatively impacts performance.
- Moved call to get Parts Listing data into cache from user login process to asynchronous AJAX call on Home screen. The full list will only be reloaded when the first user logs in, if the cache has been cleared by IIS or when manually reloading cached data by clicking

Settings (page) > **Utilities** (tab) > **Reload Cached Data Lists** (button).

- Please ensure ONLY ADMIN OR CO3 User must **Reload Cached Data List**. This must be done ONCE after the upgrade. This will avoid Internal SERVER ERRORS for all Users.



[click on image to view]

- Added tile to create quotes from Warnings list.

Prerequisites:

- BPO Database objects

Upgrade Notes:

- BPOCRM_v3.5.6.4 Upgrade Script
- Install BPOCRM_v3.5.6.4
- Install BPOCRMWebService_v3.5.6.4

3.5.6.3

v3.5.6.3 (Pre-release)

Functionality Changes / Fixes:

- Fixed issue where customer name did not pull through on MaintainActivity.aspx when clicking on activity tile on ViewCustomers.aspx for customers beyond the CRMCustRowsLimit setting.
- Updated sp_bpoGet_CRM_SALSCustomerQuotes and sp_bpoGet_CRM_SALSSalesmanQuotes so that quotes on closed cases can only be viewed from the quote listing page.
- Fixed bug on Case Config page where check boxes did not have a default value.
- Added Utilities tab on Settings page that includes a button to force reload of cached data lists from the database.
- Added missing captions scripts for Salesman's Customers' Equipment.
- Moved Row count limit on Salesman's Customers' Equipment from code to sproc.
- Modified sp_bpoGet_CRM_SALSSalesmanMachinesCtrtInfo to address performance issues.
- MaintainActivity Quote fixed error on Get Customer Defaults.
- MaintainQuote: Quote contact not in correct format.
- Quotes: fixed issue where clicking the + button after adding an item would re-add the previous item again.
- Fixed scripts IE compatibility issues.
- Added Stock availability to quote available items drop-down.
- Added new recommendation to warn salesman of quote reaching end of validity.
- Added configurable restriction to prevent release of customers if the completion percent is too low.
- Address dropdown is hidden for new customers on Cold Call and Maintain Contact.
- Added Quote Expiring Warning to Recommendations.

- Added new CRM Setting in Static Data, QuoteExpiryWarningDays, to set how long before a quote expires to create a follow up recommendation for the salesman.
- Added Current Stock to Available Quote Items drop-down.
- Updated Quote Accept page to new CRM style.
- Added configurable customer Completion Percentage check to allow/prevent Customer Release.
- Added MinCompletionToRelease to CRM Settings Static Data. This is a number from 0-100 that compares with the Customer Completion Percentage.
- Added CRM Security Right: fldItemPriceEdit to control editing of Item Prices on quote line items

Prerequisites:

- fn_bpoGet_CTRTContractByItem BPO function is required and may need to be added manually for earlier BPO versions.

3.5.6.2

- Internal test release. All updates are listed in 3.5.6.3 section.

3.5.6.1

- Internal test release. All updates are listed in 3.5.6.3 section.

3.5.6.0 Upgrade (19.06.2019)

CO3 PRODUCT RELEASE – SCRIPT AMENDMENT v1.0.0.5

BPOCRM – v3.5.6.0 Upgrade from v3.5.5.1 or Refresh of v3.5.6.0

Application Version Compatibility:

- BPO2 v2.2.0.1 or later
- Where BPOCRM is v3.5.5.1 or v3.5.6.0

Amendments:

- Fixed version check portion of the script
- Updated the database object version list and ensured all latest version objects are included in the script

Files Required:

Local File Server Link: BPOCRM_v3.5.6.0_UpgradeOrRefresh_v1.0.0.5_BPOCore.7z

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3.5.6.0 (25.03.2019)

Functionality Changes / Fixes:

- Added Equipment link to Home page to get all equipment for salesman's customers and / or subordinates or for all customers if the user is a sales admin.
- Added Third Party link to Home page to get all third parties for salesman's customers and / or subordinates or for all customers if the user is a sales admin.
- Added delete function to third party listing page for Third Party Contracts, Items and Usages. Deleting any of the records will delete all child records by means of triggers on the applicable table.

- Note that if no Items exist on a Third Party it will not show up in the listing.
- Fixed issue that occurred if "Hide dashboard panel" was missing from Salesman's config data in the database and caused problems with data loading.

Upgrade Notes:

- BPOCRM_v3.5.6.5 Upgrade Script
- Install BPOCRM_v3.5.6.5
- Install BPOCRMWebService_v3.5.6.0

Files in:

Implementations\CO3_Releases\Applications\BPO_CRM\v3.5.6.0

3.5.5.1 (07.02.2019)

Functionality Changes / Fixes:

- Fixed bug with Winning / Losing cases.
- Added automatic adjusting of activity end time in UI if start time is before end time. Corrected time will set end time to 1 hour after start time.
- Removed notice that indicated that Third Party Item Make was optional. Third Party Item Make is a mandatory field.
- Various minor issues.

3.5.5.0 (07.02.2019)

Functionality Changes / Fixes:

- Consolidated release including all updates in internally released version 3.5.4.0
- Added setting flag “AllowRankEditColdCall” to allow users to edit the Customer Rank field for existing customers.
- Performance enhancements:
    - All pages have been recoded to do minimum required web service calls and retrieve minimum required data on page.
    - Login function called on each page has been optimized.

    - User login preloads dashboard data, system settings and user settings asynchronously into user’s session. Settings are now loaded from these session objects to reduce server calls.
        - Pages using these new session settings include:
            - AjaxGetActivityVsTarget.aspx
            - AjaxGetCRMIndicators.aspx
            - AjaxGetDash-boardDataAsync.aspx
            - AjaxGetPipelineSummary.aspx
            - AjaxGetSalesTar-getVsActual.aspx
            - AjaxSaveSales-manConfigSetting.aspx
            - CreateColdCall.aspx
            - Home.aspx
            - MaintainActivity.aspx
            - MaintainConfig.aspx
            - MaintainContact.aspx

        - MaintainQuote.aspx
        - MaintainStageGates.aspx
        - MaintainThirdParty.aspx
        - ManageCustomerSalesmen.aspx
        - ManageSalesmen.aspx
        - NextActivity.aspx
        - ReleaseCustomer.aspx
        - Simple.Master
        - Site.Master
        - User.aspx
        - ViewActivities.aspx
        - ViewCases.aspx
        - ViewCustomer.aspx
        - ViewDashboardActivities.aspx
        - ViewPipeline.aspx
        - ViewQuotes.aspx
        - ViewRecommendations.aspx
        - ViewReport.aspx
        - ViewServiceCalls.aspx
        - ViewWarnings.aspx
        - WebServiceProxy.cs
- Home page
    - Dashboard data is preloaded asynchronously and does not reload on page display. Only tile indicators refresh after page load.
    - Activity lists update on asynchronous callback.
- Customer page
    - Same as Home Page.

- Cold Call
  - Optimized postbacks and callbacks to only do minimum required web service calls.
  - Bank details lookups are only fetched on demand.
- Maintain Contact (Contacts and Customers)
  - Optimized postbacks and callbacks to only do minimum required web service calls.
  - Bank details lookups are only fetched on demand.
- Maintain Activity (Cases and Activities)
  - Optimized postbacks and callbacks to only do minimum required web service calls.
  - Case history, case activities and case quotes are only fetched on demand.
- Next Activity
  - Optimized postbacks and callbacks to only do minimum required web service calls.
- Maintain Config
  - Optimized postbacks and callbacks to only do minimum required web service calls.
  - Changed colour of user’s personal settings tabs.
- Maintain Customer Salesmen
  - Optimized postbacks and callbacks to only do minimum required web service calls.
- Maintain Part
  - Optimized postbacks and callbacks to only do minimum required web service calls.
- Maintain Quote

- Optimized postbacks and callbacks to only do minimum required web service calls.
- Maintain Stage Gates
    - Optimized postbacks and callbacks to only do minimum required web service calls.
- Dashboard Data
    - Added AjaxGetDashboardDataAsync.aspx to get dashboard data asynchronously into session.
- Simple.Master
    - Optimized postbacks and callbacks to only do minimum required web service calls.
- Site.Master
    - Optimized postbacks and callbacks to only do minimum required web service calls.
- The following listing screens were optimized to reduce callbacks to web service:
    - ViewActivities.aspx
    - ViewCases.aspx
    - ViewCustomer.aspx
    - ViewDashboardActivities.aspx
    - ViewPipeline.aspx
    - ViewQuotes.aspx
    - ViewRecommendations.aspx
    - ViewReport.aspx
    - ViewServiceCalls.aspx
    - ViewWarnings.aspx
- Various bug fixes and features as detailed in BPO Issues database Tickets.

BPOCRM - All Versions - Performance Patch - Performance Target vs. Actual (03/12/2018)

Functionality Changes / Fixes:

- Performance enhancement to the stored procedure that retrieves the Activities vs. Target counts.
- Created functions to get the value of cases, quotes, orders and invoices.

Notes:

- This patch has also been incorporated into the **v3.5.3.7** upgrade script.

Files Required:

CRM_TargetVsActual_PerformancePatch1_AllVersions

BPOCRM - Performance Patch 2 - Activities vs. Targets (07/11/2018)

Urgent Update:

- There is an updated version of sp_bpoGet_CRM_SALSActivitiesVsTarget in CRMPerformancePatch2_AllVersions (CRMPerformancePatch_AllVersions), due to hard-coded data within the prior stored procedure. I have also included this update in the v3.5.3.7 upgrade script.

Fixes:

- Performance enhancement to the stored procedure that retrieves the Activities vs Target counts.

Notes:

- This patch has also been incorporated into the v3.5.3.7 upgrade script.

Files Required:

- CRMPerformancePatch_AllVersions

BPOCRM - v3.5.3.6 & v3.5.3.7 - Contact Address Hotfix Release (05/11/2018)

BPOCRM – v3.5.3.6 & 3.5.3.7 only

Functionality Changes / Fixes:

- Sets the GPS Longitude and GPS Latitude to 0 for a new contact with a new address.
- Replace the ContactMaintain.aspx file in the BPOCRM folder with the one in this hotfix.

Files Required:

CRMHotfix_V3.5.3.6_and_V3.5.3.7

BPOCRM - Performance Patch - Activities vs. Targets (05/11/2018)

BPOCRM – All Versions

Functionality Changes / Fixes:

- Performance enhancement to the stored procedure that retrieves the Activities vs Target counts.

Notes:

- This patch has also been incorporated into the **v3.5.3.7** upgrade script.

Files Required:

CRMPerformancePatch_AllVersions

3.5.3.7 (26.10.2018)

Functionality Changes / Fixes:

- Fixed bug where user's saved Session Options were not loaded into their session at log in.

Files Required:

BPOCRM Installers and Upgrade

3.5.3.6

Functionality Changes / Fixes:

- Added Company Reg. Number to Customer Maintain and Cold Call forms. This write once field can only be set when creating a new customer and cannot be updated on existing customers in CRM. Changes to this field need to be made in BPO.
- Added VAT number to the Cold Call form and can only be edited when adding a new customer or on customers having the New status.
- Added Case Value to the Cold Call screen.
- Added ability to add multiple customer shipping addresses without linking them to a contact.
- Added the optional fldRestrictCRMSearchDetail fldConfigFlag to tblCOMPConfigData to reduce the amount of info seen by users when they are not linked to the customer on the customer search.

Setting this to "Yes" will only display the Customer name and code for other salesmen's customers.

- Upgraded CRM DevExpress from 14.2.6 to 17.2.6
- All quotes created in CRM will have an escalation of 0%.

3.5.3.5

Functionality Changes / Fixes:

- Merged CRM branches into a single codebase for all version of BPO, BPO_RSI and BPO_TEL.
- Added function to include BPO Customer files in Customer Files listing. Needs to be activated in BPO Statics Data - CRM Settings – ShowBPOCustFilesInCRM = "Yes".

3.5.3.4

Functionality Changes / Fixes:

- Added support for users to search by customer code on the customer listing page.
- Added support to retrieve related items (customers, activities etc.) for unlimited subordinate levels.
- Replaced direct references to BPO stored procedures with CRM wrapper stored procedures.

3.5.3.3

Functionality Changes / Fixes:

- Added Salesmen Commercials to Salesmen Settings. The commercial item price for an item is used as the salesman's base cost

when they add the item to a quote.
- Compatibility with Sales Studio.
- Added checkbox to allow a user to hide the performance dashboard on all screens.

3.5.0.2

Functionality Changes / Fixes:

- Added feature to create a copy of a quote for the same or a different customer. All quote details are copied and all line items from the original quote are included and can be edited or removed and new items can also be added.
    - If the currency of the clone is the same the user is asked whether they want to keep the same prices or update the quote with latest prices.
    - If the currency is different the prices will be automatically updated.
    - Quote copies can be linked to an existing Case.
- Fixed a bug with converting data types when retrieving quote item prices.
- Added line item discount support to be same as BPO.
- Fixed minor quote item pricing exceptions that occurred in specific scenarios.
- Updated sprocs to only return cases with case states with tblCNFGCodes.fldStatus = 'A'.
- Updated case/activity get sprocs to enable Win/Lose Case button for CaseTypes not created in CRM where CodeType is neither “Yes” nor “No”.
- Document Report Viewer now outputs reports as PDF documents and uses the browser’s built-in PDF viewer.

3.4.6.0

Functionality Changes / Fixes:

- Added the ability to set the initial Cold Call Activity type in Static Data – CRM: General Settings.

Note:

- When creating a cold call, the system creates an initial activity which is then closed off. The next activity in the list is based on the activity information filled in by the user.Prior this version, the initial activity type was set to ‘CALL’ by default, and could not be changed.
- The static data item to configure in CRM: General Settings is ‘ColdCallFirstActivityType’. The CodeType is set to ‘CALL’ by default. Configure as required.

3.4.5.1

Functionality Changes / Fixes:

- Included the ability to select the number of rows displayed for listings within BPOCRM. Each screen can be set individually. The last setting selected, will be cached and used the next time that screen is opened. Option to view 10, 20, 50, 100, 200 or all records in the listing.

Fix:

- Ensure sorting ascending is based on the Document Reference and not the Document ID and enable sorting descending.
- Correct Internet Explorer specific “Rollback” error on attempting to save a Cold Call for a new customer.

3.4.4.0

Functionality Changes / Fixes:

- Added ability to display and select all customers in the Customer Reassignment screen.
- Activated setting to change Months to Display in the Sales Target vs. Actual Performance dashboard chart.
- Fixed code definition to ensure that CRM General Settings can be updated from Static Data.

Fix:

- Ensure that the Quote Listing screen displays quotes for Subordinates, where 'Show Items for Subordinates' is selected in the user's Session Options.

3.4.3.1

Functionality Changes / Fixes:

- Ensure that the Sales Quote Item Selling Price is correct, especially with regard to the Foreign Exchange patch to enable customers with foreign currency to charge a vat rate. Fix also done to ensure that Service and Subcontract pricing is correct when added from Sales Templates.

3.4.3.0

Exchange, iCal Calendar and iCal Invite Calendar Appointment Details:

- Update on the calendar appointment information that is synced to Exchange calendar, subscribed iCal calendars and iCal Invite

Emails:

- **Appointment Subject:** Customer Name: Activity Description
- **Location:** Address
- **Start Date Time:** Schedule Start Date Time
- **End Date Time:** Schedule End Date Time
- **Description/Body:** Customer, Contact, Contact Mobile, Contact Telephone Number, Contact Email Address, Activity Description, Activity Comments, Schedule Start and End Date Time, Location, Attendees, Case Subject, Case Information, Organizer, Organizer Company Name, Organizer Telephone Number, Organizer Email Address

Exchange Calendar Sync:

- Attendees are now linked to the synced calendar appointment. Note that invites are not sent automatically – this can be done from the calendar application used by the organizer, e.g. Outlook.
- If 'Enable Sync' to Exchange is set, then iCal Invites will not be sent (regardless of the configuration set for 'Allow user to send iCal invites to attendees').

iCal Invite Emails:

- Global setting to 'Allow user to send iCal invites to attendees' (in Static Data – CRM: General Settings – 'CRMSendInvtAllowed'). If this option is set to 'No' – then 'CRMSendInvtDef' should also be set to 'No' (otherwise the 'Send Invites' checkbox will be marked by default and the user cannot unselect the option).
- For clients using iCal Invites instead of Calendar sync functional – then the recommended configuration is to set 'CRMSendInvtAllowed' to 'Yes'. If the client wishes to send most of their

activities out via iCal invites, then set ‘CRMSendInvtDef’ to ‘Yes’, otherwise set to ‘No’. The user can override this flag per activity.

Fixes:

- Resolve error related to saving an edited quote: “Column 'fldQuoteDetailID' is constrained to be unique. Value (fldQuoteDetailID) is already present.”
- Ensure the Quote Item Price is correctly saved on a newly created quote, where the ItemPrice was being updated correctly, but not the BaseCcyPrice.

3.4.2.0

Calendar Invites Integration Option:

- Ensure that invite cancellations are only sent out to Activity Attendees who have been sent an iCal invite to the activity. (Fix for issue in v3.4.0.0 and v3.4.1.0 where cancellations were sent out to activity attendees whether an invite existed or not).

Note: That cancellations are only sent to attendees who have been sent an iCal invite, under the following conditions:

- An attendee is removed from an activity
- The next activity is created before the current activity schedule date.
- Case is Won / Lost or Closed prior to the current activity schedule date.

3.4.1.0

Microsoft Exchange Calendar Integration:

- Enable configuration and sync with older versions of Microsoft Exchange.

3.4.0.0

Calendar Integration:

- Activity Calendar event now integrates with Microsoft Exchange / CRM iCal calendar can be added to Microsoft Outlook
- Ability to link Related Customers to a Case – in order to select activity attendees from another client contact list.
- Ability to select Attendees on an Activity and whether to send invites.
- Invites will be emailed to all Attendees, who can Accept or Reject the Calendar event.

- Calendar Sync and Event Invite Flow
- Sync Settings
- Microsoft Exchange - Sync Configuration
- iCalAddress - add to Microsoft Office Calendar

Case Stage Gates:

- Stage Gates - an automated process for Winning or Losing a Case.

- Case moves to the next stage automatically when all gate questions are answered.
- Pre-defined 'Steps' (Gates) need to be completed for the case stage to progress to the next stage.
- Stage Gates can be enabled / disabled per Case Type.
- Specific Stages can be selected per Case Type (not all stages will be relevant to a specific Case Type).

- A stage gate could be a: Yes / No Question, Question / Answer, Question with Drop-Down List Answer.
- Ability to select which Case Types have Stage Gates enabled.
- Ability to Add Case Types, Case Stages and Stage Gates within CRM.
    - Case Types (Define a Case, and whether Stage Gates are enabled)
        - View Case Types
        - Add Case Types
        - Manage Case Types
    - Case States (% of completion for Case Type)
        - View Case States
        - Add Case States
        - Manage Case Types
    - Case Stage Gates (Steps / Questions to be completed before moving to next Case State)
        - View Case Stage Gates
        - Add Case Stage Gates
        - Manage Case Stage Gates

Cases:

- History of all Case Changes displayed on the Case page.
- Case Source Type selection added to the Case, e.g. Referral, Recommendation, Cold Call, etc.
- Quote List displayed on the Case page.
- Case Attachment Documents are saved to a Customer Documents folder.

Quotes:

- Ability to see whether Sales Quotes are overdue.
- Ability to add a standard Customer Quotes (non-case related).

- Ability to set the Quote Status to Accepted or Rejected from the Sales Quote List.
- Ability to link additional documents when emailing a quote.
- New option allows the person receiving the quote to request the salesman to 'Contact Me'.
- In order to prevent the user sending a quote multiple times – a 'Quote has been sent' message has been added.

Activities:

- More information added to the Activity Reminder Email.
- Activity Update email will be sent to the Assigned Salesman, in order to be made aware that an Activity has been assigned or has changed.
- Target count now increments when an activity is created, not when it has been completed.

Customers and Contacts:

- View Customer Create Date on Customer screen.
- Recommendations not generated if no contactable contact, so:
    - A field has been added to the Customer List to indicate if there is a "Contactable Contact".
    - When a new customer contact is added, 'Accept Sales Calls' is set to 'Yes' by default.
- Once a customer is active, the salesman cannot change important account information: VAT Number, Registered Name and any details on the "Accounts" contact and address.
- Ability to view and add Customer Bank Details.
- Contact Send SMS and Email defaulted to 'No'.
- The Salesman's default site will be used when creating a new customer.

- Return to selected customer in the customer list screen after completing an action selected in the customer list.
- Ensure that on adding a customer, a list will display with names of similar existing companies.
- Customer type can be set as Mandatory or not in the BPO_CRM configuration (done in BPO Static Data).

Service Calls:

- Ability to Preview / Print the Work Order Document from the Service Call List.

Third Party :

- Ability to add the equipment Serial Number on Third Party information.

Settings :

- Salesman Administrator – ability for an 'Administrative User' (who is not the Main or Additional Salesman, to view and have access to all salesman functions) on behalf of a Salesman.
- Ability to configure Pipeline in Months (in the BPO_CRMWebService Web.config file)
- Auto Create New Salesman Targets from Default.
- Improved Search.
- VAT removed from Pipeline.
- Sales Manager can now see sales quotes for his team.

Fixes:

- Fix to quote status change log entry – log file now correctly displays the response.
- Prevent duplicate case attachments from being uploaded.

BPO.CRM.000