



SARATOGA CRM[®]

Release Notes

Version: 7.0

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4325 Alexander DR STE 100 • Alpharetta GA 30022-3740 • www.aptean.com • info@aptean.com

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Contents

- Introduction** **4**
- What's New in Saratoga CRM 7.0** **4**
- Important Notices** **7**
- Issues Addressed in Saratoga CRM 7.0** **8**
 - Screen Wizard 8
 - UAdmin 8
 - Saratoga CRM 8
- Known Issues in Saratoga CRM 7.0 and later** **10**

Introduction

The following Release Notes describe new features, important release information, and issues resolved in Saratoga CRM 7.0.

What's New in Saratoga CRM 7.0

The following enhancements are provided in Saratoga CRM 7.0:

1. **Report Hover Control**- A new report control is added in Rich Client and Thin Client. You can now place links to Reports directly on your Dataview. The user can hover over the report control or the report control icon to run reports directly from the open Dataview. The following tasks can be performed with the report hover control:
 - Run Reports assigned to the hover control. The reports can be designed to be contextual to the Dataview or the logged in user or you can place any commonly used report directly on the Dataview for easier access.
 - Open a Record from the Results
 - Sort Data
 - Change Column Width
 - Refresh Data
 - Send Data for External Use

For more details refer to *Report Control, System Manager's Guide Vol 1*.

2. **List Hover Control** - A new List hover control is added in Rich Client and Thin Client. A list hover control displays information about related records in related tables. It is similar to a List Grid Control. A List hover window is displayed when the user hovers over the List Hover Control icon. The List Grid mode is displayed if you click the List Hover Control. Following are some of the benefits of implementing List Hover control:
 - The user can have a quick look at the related records.
 - Since it is a hover window, the user can see the contents of the list without changing focus from the tab they are currently working on.
 - The list hover control saves valuable real estate and offers a cleaner user interface. It makes the Dataview clutter free.

For more details refer to *List Hover Control, System Manager's Guide Vol 1*.

3. **Join Hover Control** - A new Join hover control is added in Rich Client and Thin Client. A Join Hover control displays information about related records. The Join Hover window is displayed with the related information when you hover over the Join Hover icon. For more details refer to *Join Hover, System Manager's Guide Vol 1*.

4. **Quick Query** - A new Quick Query is added in the left pane of the report results page in Thin Client. It allows you to refine the criteria for the report without losing focus of the report results page. For more details refer to *Quick Query, Thin Client User Guide*.
5. **HTTPs in Mixed Mode** - You can now configure the Integration Components and Saratoga Thin Client to enable HTTPs. This would enable the Integration Components and Thin Client to communicate in a secure environment. For more details refer to *Enabling HTTPs for Thin Client and Integration Components, System Manager's Guide Vol 1*. Please contact the Saratoga Customer Solutions team for assistance with implementing this functionality.
6. **Thin Client will now automatically freeze the row number column** - Thin Client will now automatically freeze the row number column so that it always displays when scrolling to the right in the query results display.
7. **Send Formatted RTF data on Reporting Outputs** - You can now send a report with formatted RTF data to different outputs.



Note: Formatted RTF data is not supported in Send to PDF. Some formatting like bullets might be lost in Send to Excel.

8. **Display of Dashboard on Login not Mandatory** - The user can now choose in their dashboard settings to not display any dashboards on login in Thin Client.
9. **New Record Initialization of Values** - The discrepancy in new record initialization values between Rich Client & Thin Client has now been rectified.
10. **Mobile User will now be Remote User** - From this release, Mobile disconnected users will be called Remote disconnected users or Remote users.
11. **Saratoga Mobile App in Real Time will be Mobile Client** - Saratoga CRM 7.0 comes with a brand new Mobile Client instead of the mobile app for iPad and iPhone. The Saratoga CRM Mobile Client is a HTML 5 web application. It consists of Mobile Client and Mobile Server. Both Mobile Client and Mobile Server are hosted in IIS. In the previous versions, the Device Client was down-loadable from Apple App Store.

Saratoga CRM Mobile Client has the following features:

- New Dashboards and Initial Display.
- Cleaner and Modern Dataviews.
- New Navigation.
- Global Search. The search results can be displayed in tile view and list view.
- Multi-language support for French, German, and Swedish.

For more details on the new Mobile Client, refer to the following guides:

- *Installation Guide*
- *Migration Guide*
- *System Manager's Guide for Mobile Client*

12. **Web services API Guide** - A new API guide containing information on how to integrate Saratoga CRM Web Services with Saratoga Thin Client has been published.
13. **Compatibility Support for Windows 10** - With 7.0, compatibility support for Windows 10 has been added for both Rich Client and Thin Client.

Important Notices

- Form Center does not currently support the creation or modification of forms containing references to both parent and child tables when the selected dataview only contains List Hovers and not List Grids.
- **Saving a Rich Client Query Tool Report in Saratoga CRM 7.0:** As a result of the enhancement permitting Form Wizard forms to be linked to specific Query Tool reports in 6.10, any Query Tool report saved with version 7.0 will not be available to users on 6.9.0 or earlier versions. If a 7.0 user opens and saves a query created in 6.9.0 or an earlier version, the following prompt will display: **This report was created with an earlier version of Saratoga CRM. If you resave this report, you will not be able to reload the report using the earlier Saratoga CRM version. Continue saving?**
User can click the Yes button to save the report with changes.



Note: Any report saved with version 7.0 cannot be opened by any user still running 6.9.0 or an earlier version. Users running earlier versions will receive error **10064E - Report file has invalid version.**

- The default installation path for all the Saratoga applications is C:\Saratoga.



Note: You can upgrade to Saratoga CRM 7.0 from Saratoga CRM 6.8.2 or above. If the current version of Saratoga CRM that is installed is version 6.8.1 Hot Fix 1 or earlier, this installation requires an uninstall of all Saratoga versions first, followed by an installation of version 7.0.

- **It is recommended that the DVF, SCHEMA.DBD, and RPT files are backed up before upgrading to Saratoga CRM 7.0.**
- **Change of behavior for Rich Client Reports assigned to a Web Group:** Rich Client has **Run at Open** checkbox in the Report Options tab. From 6.10, Thin Client evaluates the Rich Client option to determine the appropriate behavior while running a Rich Client report assigned to a Web Group. The following behaviors will occur:
 - **Rich Client report with Prompt for Criteria checked to one or more fields and Run at Open unchecked:**

Thin Client will display the **Edit Report Options** dialog box showing all columns assigned to the report. Clicking the **Run Report** button will display another dialog box showing the **Prompt for Criteria** fields. User can enter criteria on either dialog boxes before clicking the **Show Results** button to run the query.
 - **Rich Client report with Prompt for Criteria checked to one or more fields and Run at Open checked:**

Thin Client will display the Report dialog box showing only the **Prompt for Criteria** fields. User can enter criteria before clicking the **Show Results** button to run the query.

- **Rich Client report with no Prompt for Criteria and Run at Open unchecked:**

Thin Client will display the **Edit Report Options** dialog box displaying all columns assigned to the report. In previous Thin Client versions, the report runs without presenting the report dialog box to the Thin Client user.

- **Rich Client report with no Prompt for Criteria and Run at Open checked.**

The report will run at launch in Thin Client.

Issues Addressed in Saratoga CRM 7.0

Screen Wizard

ID	Description
B9KD4SPN4	Resolved an issue to allow the user to embed report and charts into any section of a screen.

UAdmin

ID	Description
B9UUPN6AK	Resolved an issue where the Windows Authentication values were not copied from the previous user and not refreshed with the current user, when the administrator scrolls through the users in UAdmin using the Next and Previous buttons.
B9MM4JM70	Resolved an issue where the LDAP authentication was causing the application to crash.

Saratoga CRM

ID	Description
B8V260G05	Resolved an issue where the column headings are not aligned with the actual columns when browsing for reports in Thin Client.
B7K994V5V	Resolved an issue where the columns were not getting sorted in the Query Tool when there was a formula associated with it in Rich Client.
B9W3CUBUU	Resolved an issue where opening the Dataview was displaying an error message when a Quick Search was performed on a level three table in Rich Client.
B9Q0NQ4AE	Resolved an issue where a syntax error was displayed when the search criteria

ID	Description
	on a view field contained an apostrophe in Thin Client.
B8T95SXZC	Resolved an issue where Mobile Client was not supporting date range in prompt for criteria reports.
B8U93XUMH	Resolved an issue to make the In Progress icon in Mobile Client more easy to see.
B6TN3HCXB	Resolved an issue where an error message was displayed when trying to open a record from Quick Search result in Rich Client.
B9UW1XDLG	Resolved an issue where the scroll bar was disabled in the Deluxe RTF field in Rich Client, if the user did not have Change authorization security.
B8YN6S3GR	Resolved an issue where the index was outside the bounds of an array error if the formula column did not contain an actual formula in Thin Client.
B9WILZKHM	Resolved an issue where an error message was displayed if the file name in the url contained two # signs in Thin Client.
B9O92M1S1	Resolved an issue in Query Tool, where the user was not able to scroll or add new fields to a report while clicking the arrow to sort records in Thin Client.
B9PF5KODF	Resolved an issue where the reject rule was being fired before making any changes when the user clicked on the pencil icon on a field in list grid where a reject rule was set in Thin Client.
B9P13UU44	Resolved an issue in Thin Client where the Numeric fields were being sent to Excel as "text" and had to be re-formatted in Excel before Sum and other calculations could be performed. Numeric fields are now being sent to Excel in number format.
B9YJ2B3Z6 B9P882GEP	Resolved an issue where Thin Client dates in Query Results were being displayed in US format irrespective of the language set in the browser.
B9M6379VF	Resolved an issue where Thin Client was not able to display the list grid due to an input string error.
B9WO6TWAU	Resolved an issue in Thin Client where bitmaps were not displayed correctly in IE11 browser in Thin Client.
B9OU39VS1	Resolved an issue where Send Email to Selected Recipients, displayed an error message in Thin Client.
B9OPDTMXQ	Resolved an issue in Thin Client where the dataview is not opened and an error message is displayed when the user defines a report against a table that has no detail page in the dataview but only a listgrid.
B9JID8NFX	Resolved an issue where an error message is displayed in Thin Client Query Tool when a numeric value is specified with range in edit mode.

ID	Description
B9PFFIGCG	Resolved an issue where the detail page of conditional tab is not refreshed when condition changes and a new conditional tab is displayed in Thin Client.
B9VN2T7BM	Resolved an issue in Thin Client where the installer in German language was displaying the word Event incorrectly.

Known Issues in Saratoga CRM 7.0 and later

To view the known issues, log on to the [Saratoga Customer Portal](#). If you do not have logon credentials, send an e-mail to [Global Technical Support](#) requesting access to the Saratoga Customer Portal.