APTEAN

SARATOGA CRM®

Contents

Introduction

The following Release Notes describe new features, important release information, and issues resolved in Saratoga CRM 7.2.

What's New in Saratoga CRM 7.2

The following enhancements are provided in Saratoga CRM 7.2:

1. **Office 365 Support for Saratoga Thin Client** - Depending on the System Manager's design, the Office 365 integration enables you to:

   - Send email from Dataview or report results to Office 365.
   - Send calendar items from Dataview or report to Office 365.
   - Send contacts from Dataview or report results to Office 365.
   - Integrate Office 365 items (email, calendar, and contacts) with Saratoga CRM Thin Client records.

2. **Interactor** - Interactor is an HTML page that comes pre-packaged with Saratoga CRM 7.2 Thin Client. It allows you to open Dataview files using external programs or run reports and dashboards.

3. **Thin Client Browse for Reports** - The following new columns are added for reports on the Browse for Reports screen. Values are added to these new columns automatically for each report run in 7.2.0. or later.

   - **Last run by**: Name of the user who ran the report last.
   - **Last run**: Date on which the report was last run.
   - **Total runs**: The total number of times the report was run by all users.

4. **Thin Client Global Search Redesign** - Global Search results now look consistent with reports. Features that are available in reports such as auto column resize, pagination, grouping, sorting, and alternate row coloring are now available for Global search results.

5. **Improved Reports UI in Thin Client** - Saratoga CRM 7.2 now has an improved reports UI to enhance user experience. The Refine Criteria, Edit, Options, Print and Send options are now available as icons that are highlighted in the following image.

6. **iOS 11 Compatibility for Mobile Client** - Saratoga CRM 7.2 Mobile Client is compatible with iOS 11.

7. **Support for Oracle Driver 12.1.0.2** - Saratoga CRM 7.2 now supports Oracle driver 12.1.0.2.

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 7.2**: 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 7.2 will not be available to users on 6.9.0 or earlier versions. If a 7.2 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 7.2 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:** The upgrade of Saratoga CRM to 7.2 release has been tested and certified from Saratoga CRM 7.0 or later.

- **It is recommended that the DVF, SCHEMA.DBD, and RPT files are backed up before upgrading to Saratoga CRM 7.2**.

- **Thin Client sort order is not retained when report result has RTF column**

  Thin Client will not retain the sorting of results by column if the RTF column is sorted and user clicks on edit mode and comes back.

- **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 7.2

The following issues are addressed as part of Saratoga CRM 7.2.

UAdmin

ID	Description
BAC23R8I1	Resolved an issue involving Windows Authentication and Thin Client. In the **Thin Client > User Settings** window, when the user checked or unchecked the **Login automatically with Windows Authentication ...** option, the change was not being correctly applied to the user's profile in UAdmin.

Saratoga Mobile Client

ID	Description
BA2SDXQI5	Resolved an issue in Mobile Client where the user was not allowed to add a child record without saving the parent.

Saratoga Thin Client

ID	Description
BANYF9HFN	Resolved an issue in Thin Client where dashboards with special characters in the dashboard name were not loading.
BA9J3I5K5	Resolved an issue in Thin Client where dashboard URLs were not able to be saved in some cases.
BAB95UZ9B	Resolved an issue in Thin Client where URLs in Thin Client Dashboard were not showing some elements and features like graphs while viewing on Internet Explorer 11 set to Document mode.
BA9L3HFX1	
BAB94E0F1	Resolved an issue in Thin Client where reject messages were shown repeatedly even after the reject condition was satisfied.
BACK3196Y	Resolved an issue in Thin Client where the update rule returned different results when compared to Rich Client.
BA9J3PY92	Resolved an issue in Thin Client where the link changes to 'Invalid URL' if **|** or **ö** or **ä** is entered as part of a URL in the dataview text box.
BAEP3X9P8	Resolved an issue in Thin Client on Internet Explorer where the user must click on the background to close a popup list on the DVF toolbar.
BABR7RD42	Resolved an issue in Thin Client where columns secured via Allow rules are not refreshing correctly. This can occur when the columns that are referenced by the Allow rules are on a different tab in the dataview than the column that is being

ID	Description
	enabled or disabled based on the rule firing.
BAF3KDL5V	Resolved an issue in Thin Client where the column width of reports was not getting auto-resized based on content.
BAOGHHBZ6	Resolved an issue in Thin Client where the update rule for list controls was not firing dynamically. The user had to click outside the list control for the data to get populated in the related field.
BAOGIKR4N	
BAP53D6TN	Resolved an issue in Thin Client while running .NET Framework 4.6.2 or higher where Thin Client crashed if a record in list hover control was attempted to be opened with a double-click.
BAQQFBPY2	Resolved an issue in Thin Client where rules were not getting triggered as expected when the @Select was used in Init or Update rule.
B9PT52TVF	Resolved an issue in Thin Client where the Allow rule was not getting triggered as expected when the column was modified based on the target value set in the Create rule.
BAQ2GM4B0	Resolved an issue in Thin Client where the Update rule was not getting triggered on the check box in some instances.
BAR3H3S6W	Resolved an issue in Thin Client where entering invalid data in a numeric field would hang the Thin Client in Chrome browser.

Known Issues in Saratoga CRM 7.2 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.