



Maximizer[®] CRM

What's New Feature Guide

Maximizer[®] CRM 12 Summer 2013

Maximizer Software Inc.

Level 10, 815 Pacific Highway

Chatswood, NSW 2067

Tel (02) 9957-2011 Fax (02) 9957-2711

www.maximizer.com.au

June 28, 2013

Contents

What's New in Maximizer CRM 12 Summer 2013

Web Access	Page 3
Windows Access	Page 13
Mobile Access	Page 17
Microsoft Outlook Add-on	Page 20
New supported products	Page 22

Fixed in Maximizer CRM 12 Summer 2013

Page 23

Notice of Copyright

Published by Maximizer Software Inc.

Copyright © 2013

All rights reserved.

Registered Trademarks and Proprietary Names

Product names mentioned in this document may be trademarks or registered trademarks of Maximizer Software Inc. or other hardware, software, or service providers and are used herein for identification purposes only.

Applicability

This document applies to Maximizer CRM 12 Summer 2013 Group and Enterprise Edition software and documentation and all other Maximizer CRM 12 Summer 2013 add-on products:

- Maximizer CRM Customization Suite 12 Summer 2013
- MaxExchange 12 Summer 2013
- MaxMobile 12 Summer 2013

Maximizer CRM Web Access

User-defined fields

Mandatory user-defined fields based on rules

When you work with Address Book entries, you can specify that user-defined fields are mandatory if a rule is matched. The mandatory rule compares formulas using the same syntax as formula user-defined fields. It can contain basic fields and user-defined fields.

When you save an Address Book entry, Maximizer will check if any mandatory rule is matched and make the associated user-defined fields mandatory.

Modify Table Field - Mozilla Firefox

w12-rd-hse/maximizerwebaccess/Dialogs/TabbedDialogs/Tabs/SetupUI

Modify Table Field Save Cancel

Field properties

Folder name: \

Name: Customer Interests

Field may be added to: ☒ Companies ☒ Individuals ☒ Contacts

Attributes

☐ Single value only ☐ Set to hidden

Mandatory

☐ Not mandatory

☐ Always mandatory

☒ Mandatory based on rule Insert Field...

[Customer Interests]!="Press Releases"

Access rights

Full access: Public


Read access: Public



Alphanumeric, numeric, date and table user-defined fields can have mandatory rules. Yes/No and formula user-defined fields don't support mandatory rules.


URL type of user-defined fields

You can now use alphanumeric user-defined fields to record URLs for entries. The fields are displayed as hyperlinks in Key Fields. They are clickable in the User-Defined Fields tab.

Dolton, James
 Position: **General Manager**
 Department: **Sales**



 **Edit**
 **Print**

Phone numbers


Main: (604) 601-8000
Fax: (604) 601-8001

Email addresses and website

Main: escona@maximizer.com
Website: www.maximizer.com

Key Fields for: General Contact 
Contact How?: **Email**
Category: **Partner**
Primary Interest: **As an agent/distributor**
First Contacted Date: **February 9, 2011**
Linkedin Profile: www.linkedin.com/james_dolton
Facebook: www.facebook.com/james_dolton

Clicking the link will open the web page in a new browser screen.

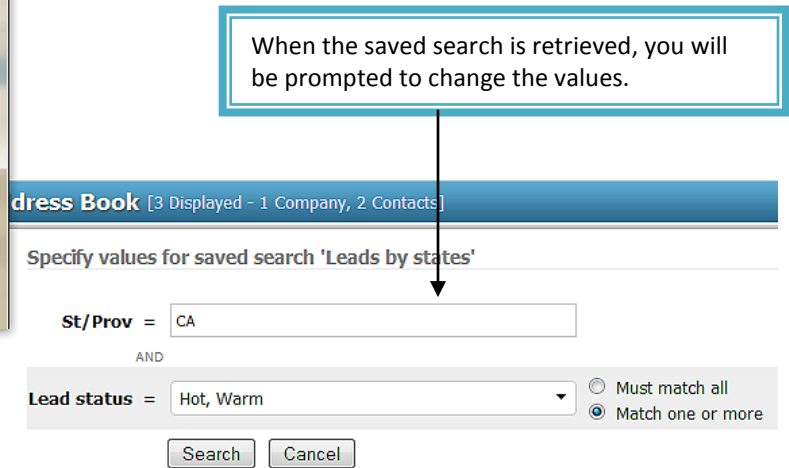
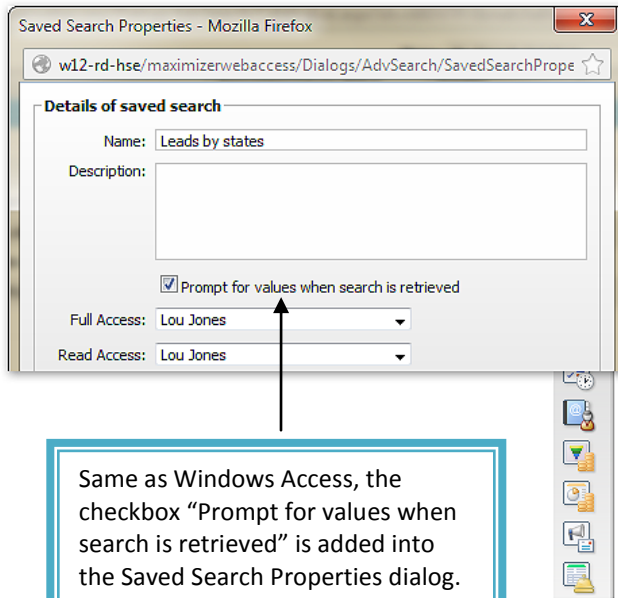
Ability to display currency symbols for numeric user-defined fields

You can now specify that a currency symbol is displayed in numeric and formula user-defined fields. The currency symbol will appear in Key Fields, user-defined fields, column setups, column reports, export to Excel and dashboards. If multi-currency is not enabled, the currency symbol is based on the locale setting in Preferences. If multi-currency is enabled, the corporate currency symbol will be displayed.

Search

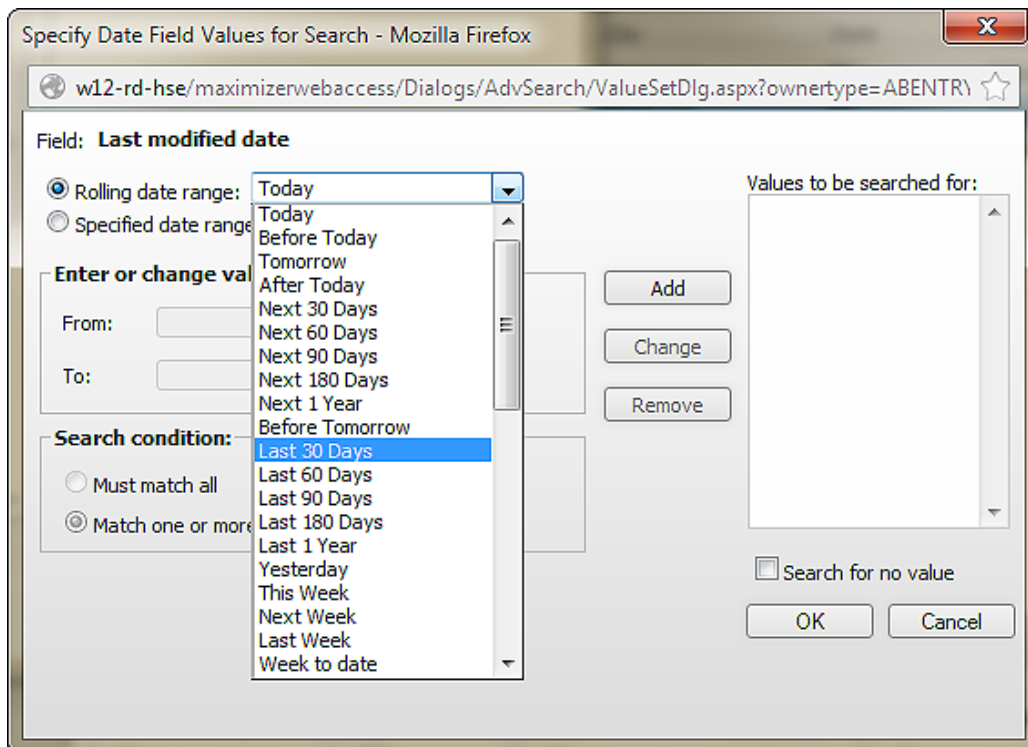
Prompt for entering values for user-defined fields when retrieving a saved search

You can now specify that the values in a saved search may be changed when the search is run. When the search is retrieved, you will be prompted with the list of fields specified in the search. You can change the values for each field.



More options for rolling date ranges in searches

More options are available for rolling date ranges when searching a date field. The new ranges include: after today, next 30, 60, 90, 180 days, next 1 year, last 30, 60, 90, 180 days, last 1 year etc.



Support search by documents in Customer Service

You can now search for Customer Service cases by documents.

Support ignore year for search by date fields

You can now search a date user-defined field by a specific date range that is independent from the year. For example, you can search for clients whose birthdays are in the next month.

Combine, Convert and Duplicate Entries

Combine selected Address Book entries

You can combine information from multiple Address Book entries into a single entry. You have the option to keep the source entries or delete the source entries. All information is copied to the target entry without over-writing any of the original information in the entry. The source and target entries must be the same type of entries.

Convert an individual to become a contact of a company

You can now convert an individual to a contact of an existing company directly. You can choose to create a new alternate address in the company entry using the address of the individual entry. All data is transferred to the new contact and the original individual is automatically deleted.

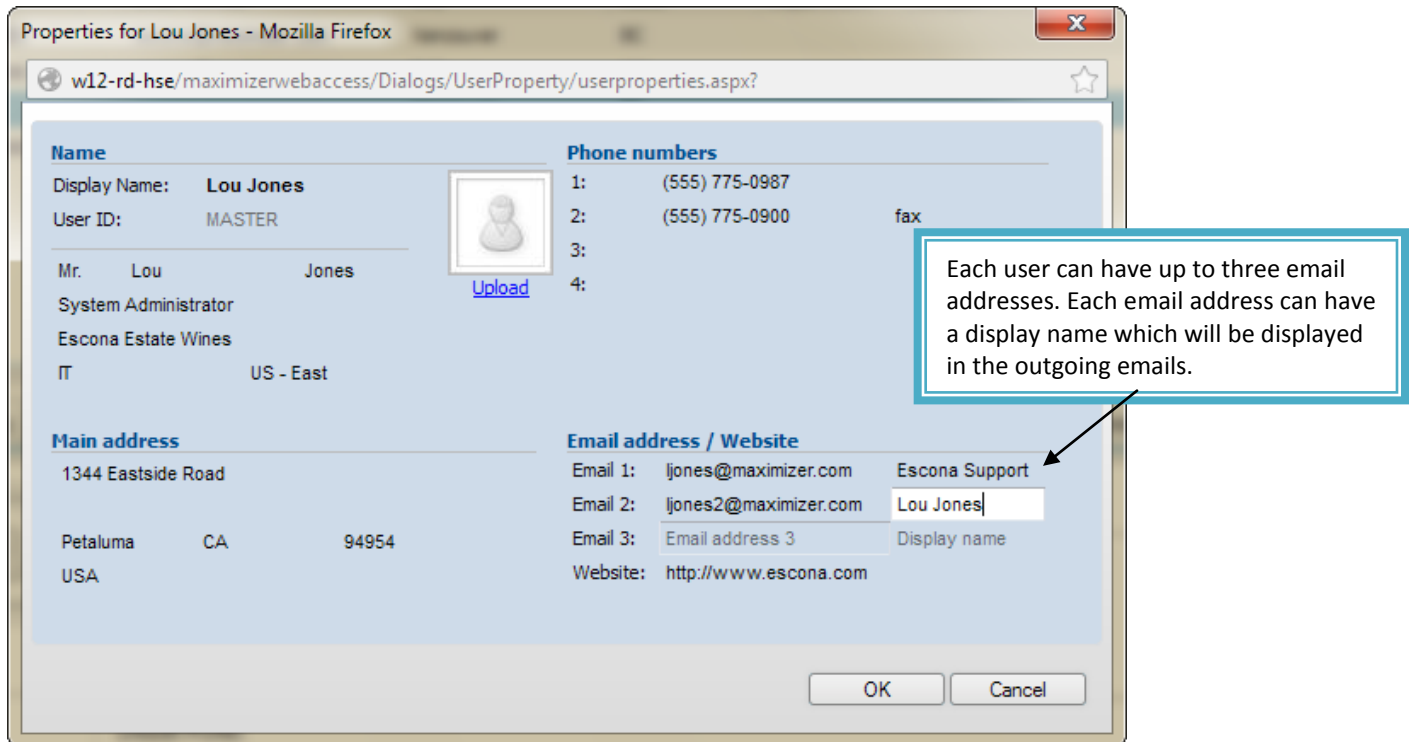
Create duplicate Address Book entry, opportunity, case

You can create a new Address Book entry from an existing Address Book entry. You have the option of copying all opportunities, customer service cases, notes, documents, appointments and tasks from the source the entry into the new entry. You can also create a new opportunity or case from an existing entry. You have the option of copying notes, documents, appointments and tasks.

Email

Allow multiple email addresses for each Maximizer user and support display name for each email

Each Maximizer Web Access user can have up to three email addresses. Each email address can have a display name. The outgoing emails show the display name instead of the user's name.



Properties for Lou Jones - Mozilla Firefox

w12-rd-hse/maximizerwebaccess/Dialogs/UserProperty/userproperties.aspx?

Name

Display Name: **Lou Jones**

User ID: MASTER

Mr. Lou Jones

System Administrator

Escona Estate Wines

IT US - East

Phone numbers

1: (555) 775-0987

2: (555) 775-0900 fax

3:

4:

Main address

1344 Eastside Road

Petaluma CA 94954

USA

Email address / Website

Email 1: ljones@maximizer.com Escona Support

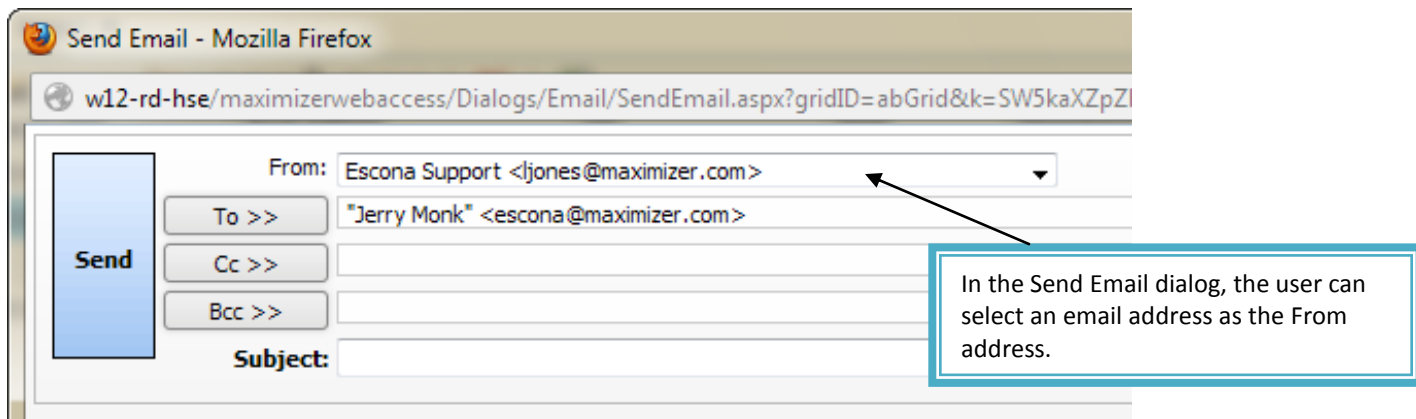
Email 2: ljones2@maximizer.com Lou Jones

Email 3: Email address 3 Display name

Website: http://www.escona.com

OK Cancel

Each user can have up to three email addresses. Each email address can have a display name which will be displayed in the outgoing emails.



Send Email - Mozilla Firefox

w12-rd-hse/maximizerwebaccess/Dialogs/Email/SendEmail.aspx?gridID=abGrid&k=SW5kaXZpZl

Send

From: Escona Support <ljones@maximizer.com>

To >> "Jerry Monk" <escona@maximizer.com>

Cc >>

Bcc >>

Subject:

In the Send Email dialog, the user can select an email address as the From address.

Improvements to email templates

- Email templates now support two-level security.
- A new privilege has been introduced to determine which users have the right to create or modify email templates.
- The email subject can be saved as part of the email template.
- Merge fields are supported in the email subject.

Insert image into an email or email signature through an URL

You can insert an image into an email or email signature using an URL. This allows you to insert an image from your company web server, instead of your local machine.

Saving an email to associated opportunity or case from Documents tab

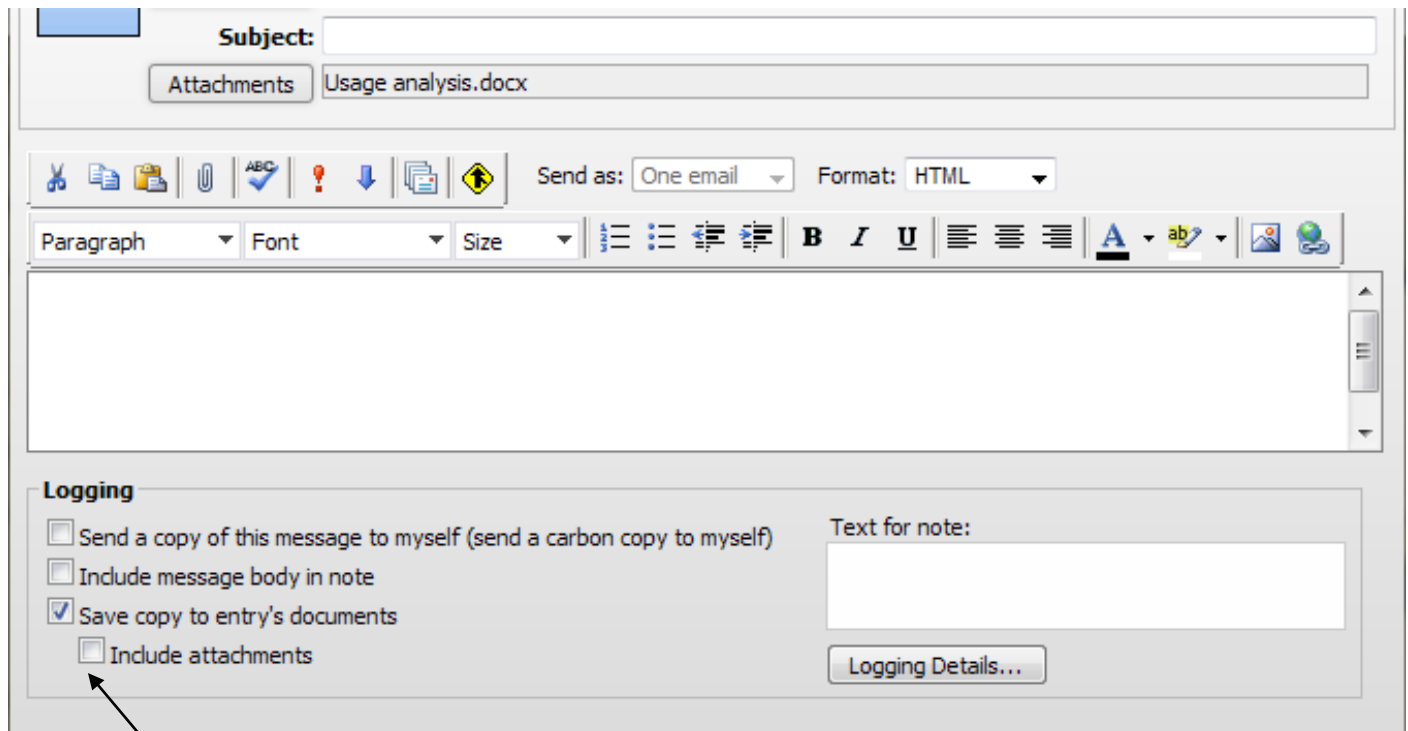
If you reply or forward a saved email from the Documents tab in an opportunity or a Customer Service case, you can now save the email against the opportunity or case.

Support email signature in email notification for appointments and tasks

The email notification for appointments and tasks can now include your signature. The notification email supports HTML format.

Allow saving an email without the attachments

When composing an email in Maximizer, you can now save the email to entry's documents without including the attachments.



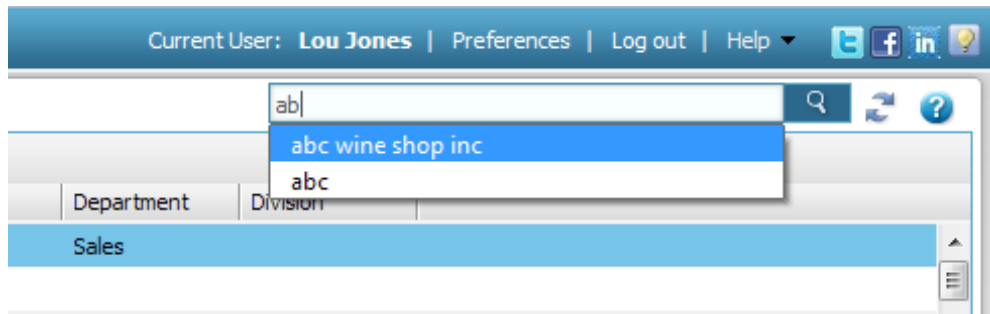
The screenshot shows the email composition interface in Maximizer CRM. At the top, there is a 'Subject:' field and an 'Attachments' section showing 'Usage analysis.docx'. Below this is a toolbar with icons for various actions and a 'Send as: One email' dropdown. The main body of the email is a large text area. At the bottom, there is a 'Logging' section with several checkboxes: 'Send a copy of this message to myself (send a carbon copy to myself)', 'Include message body in note', 'Save copy to entry's documents' (which is checked), and 'Include attachments' (which is unchecked). An arrow points from a callout box to the 'Include attachments' checkbox. To the right of the checkboxes is a 'Text for note:' field and a 'Logging Details...' button.

If you un-check this checkbox, the attachment won't be saved.

Usability

Quick search shows previously searched entries

When you are typing in the Quick Search field, a list of previously searched strings that match the search text will be displayed. You can quickly select a search string from the drop-down, instead of re-typing it again.



Allow the user to create or modify Key Fields within Web Access

Now you don't need to use the Administrator module to add, modify or delete Key Field lists. You can do it from Web Access. You need to have the new Modify Key Fields privilege to add or edit Key Fields lists.

Key Fields for:
General Customer

Pressing this button opens the dialog for adding, modifying or deleting Key Fields lists.

Primary Interest:		Do not solicit by:	
Last Visit:	July 29, 2011	Category:	Partner
Annual Sales:	5500000.00	Territory:	North / Int'l
Retail Wine Cost:		Territory Status:	Set by Rule
Region:	CAN - West	Account Manager:	Billie Holly
Industry:	Retail Sales	Full Access:	Public

Support context menus in following tabs

The right-click menu is now available in the Contacts and Related Entries following tabs. This allows you to quickly access commonly used actions.

Easier to insert a note or document to an Address Book entry

You can now insert a note or a document from the Details tab or the read-only pop-up of an Address Book entry, and from the right-click menu in the Contacts and Related Entries following tabs.

After resizing the columns, column width will be saved to the column setup automatically

After you resize the columns, the column width will be saved to the current column setup view automatically. This feature is available in all pages that have column setups, as well as the Notes, Documents and Activities following tabs.

Entries remain selected after performing an action

You select multiple entries and perform an action. After the action is completed, those entries remain selected. This is convenient to you if you want to perform another action against those entries.

Improved performance for calculating formula user-defined field

When the calculation of a formula user-defined field is in progress, you can now close the dialog and work in other areas in Web Access or Administrator.

Display pre-defined subjects in the Search by Basic Fields dialog in Customer Service module

In the Search by Basic Fields dialog for Customer Service cases, the pre-defined subjects will be available for the Subject field.

View selected entries in Address Book from the Contacts and Related Entries following tab

You can now view the selected entries from the Contacts and Related Entries following tabs in the main Address Book list.

Pressing this button will switch to the Address Book module and retrieve the selected Address Book entry.

Printed notes include information about the Address Book entry

In the printed notes, the contact information of the Address Book entry will be printed. The information includes address, phone numbers, emails and website.

Email dialog is modeless

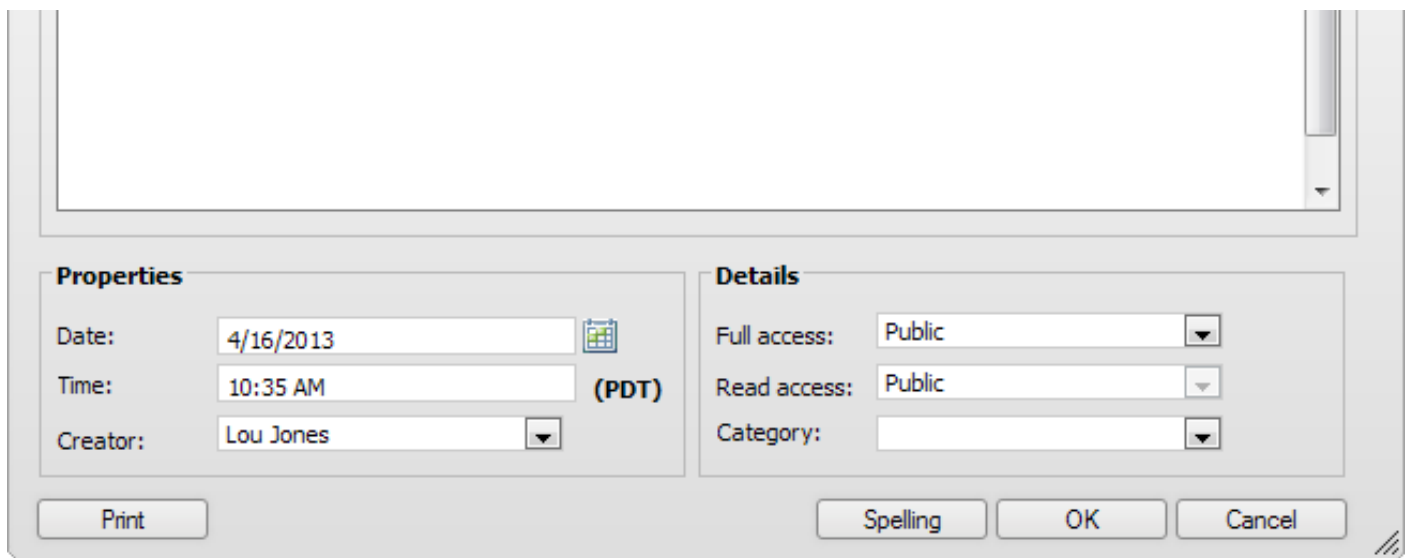
The email compose dialog is now modeless. This allows you to perform multiple tasks at the same time. For example, you are writing an email. A phone call comes in. You can minimize the email compose dialog, check notes of another Address Book entry, finish the call and come back to the email again.

Filters in Activities tab are sticky

The filters in Activities following tab are now sticky across sessions. You don't have to reset the filters in the Activities tab every time you log in to Web Access.

Display server time zone in notes

Now you can see the server time zone when creating a manual note. This makes it clear when the note is created if the server is located in a different time zone. In order to display the time zone, you need to turn on the option in the Web.Config file.



The screenshot shows a dialog box with two main sections: 'Properties' and 'Details'. The 'Properties' section contains fields for 'Date' (4/16/2013), 'Time' (10:35 AM) with a '(PDT)' label, and 'Creator' (Lou Jones). The 'Details' section contains fields for 'Full access' (Public), 'Read access' (Public), and 'Category'. At the bottom, there are buttons for 'Print', 'Spelling', 'OK', and 'Cancel'.

Always display company/individual on top in the Contacts following window

Company/individual is always displayed on top in Contacts following window, regardless of which column is sorted.

Automatically populate the document name when creating a document in Documents tab or Company Library

When you create a document in the Documents tab or in the Company Library, if you don't type in a name for the document, the file name will automatically be used as the document name.

Find duplicates in the sorted column

You can now find the duplicated items in the sorted column. For example, when you are preparing a list of Address Book entries for an email campaign, you can sort the email column and look for the duplicated email addresses. This will prevent you from sending multiple emails to the same entry.

Ignore past appointments when retrieving unfinished activities

If you turn on "Carry Forward Unfinished Activities", only the overdue tasks will be retrieved. The in-completed appointments in the past won't be displayed. The label for the option has been changed to "Carry Forward Unfinished Tasks".

Add Address Book entries to Recent Entries list

Besides opening an Address Book entry in the Details tab, performing other actions will also add the entry to the Recent Entry list. These actions include working with an entry through the right-click menu, and working with notes, documents and activities associated with the entry.

Support opportunity status in coloring rule

You can now highlight the opportunities based on the opportunity status.

Allow creating appointment with multiple Address Book entries at once

You select multiple entries in the Address Book or Contacts screen. When you schedule an appointment, all the selected Address Book entries will be included in the appointment.

Action Plan

Option for rescheduling Action Plan activities

If you change the date of an activity in a dependent Action Plan, you have the option of rescheduling all the in-completed activities based on the number of days earlier or later the activity is moved.

Email notification for Action Plan activities

You can now send email messages to other users added to appointments or tasks in the Action Plan.

Others

Display accurate message when password doesn't meet the complexity criteria

When you change your Maximizer password and it doesn't meet the complexity criteria set in SQL, a proper message will be displayed.

Contextual help for creating formula UDF

The contextual help is now available in every dialog that allows you to create a formula or define a mandatory rule. You can see the syntax and examples. Note that the help is available in Maximizer Web Access only, not in Administrator.

Support print appointment and task details

You can now open an appointment or a task and print the details of the appointment or task. The Print Appointment Details report in Calendar has also been updated to include more information.

Logging note for task contains date change

The logging note for tasks now includes the details about a date change, including the new date/time and the previous date/time.

Performance improvement for territory alignment

When territory alignment is in progress, you can now continue working in Web Access. An email notification will be sent to you when the alignment is completed.

More help videos in product

More help videos have been added into Web Access, including: How to install and setup Outlook integration and word Integration, How to manage mandatory fields and Key Fields, How to create Favorite

Lists, How to add and remove entries from Favorite Lists, How to create dashboards. You can also access all the Maximizer help videos from the Help menu.

Maximizer CRM Windows Access

Mandatory user-defined fields based on rules

When you work with Address Book entries, you can specify that user-defined fields are mandatory if a rule is matched. The mandatory rule compares formulas using the same syntax as formula user-defined fields. It can contain basic fields and user-defined fields.

When you save an Address Book entry, Maximizer will check if any mandatory rule is matched and make the associated user-defined fields mandatory accordingly.

The screenshot shows the 'Table Field Properties' dialog box for a field named 'Primary Interest' in the 'Sales' folder. The 'Attributes' section includes checkboxes for 'Single value only' (checked) and 'Set to hidden' (unchecked), with 'Full access' and 'Read access' both set to 'Public'. The 'Field may be added to' section has checkboxes for 'Companies' (checked), 'Individuals' (unchecked), and 'Contacts' (checked). The 'Mandatory' section has a dropdown menu set to 'Mandatory based on rule' and a text field for the rule: '[Sales\Lead source] == "Internet Lead"'. The 'Creation Details' section shows the creator as 'Lou Jones', the date created as 'January 14, 2004', and the time created as '7:40 AM'. At the bottom, there is a 'Modify properties' checkbox and 'OK' and 'Cancel' buttons.

New options for mandatory –The drop-down includes: not mandatory, always mandatory and mandatory based on rule.

Alphanumeric, numeric, date and table user-defined fields can have mandatory rules. Yes/No and formula user-defined fields don't support mandatory rules.

Improvements to email templates

- Email templates now support two-level security.
- A new privilege has been introduced to determine which users have the right to create or modify email templates.
- The email subject can be saved as part of the email template.
- Merge fields are supported in the email subject.

URL type of user-defined field

You can now use alphanumeric user-defined fields to record URLs for entries. The fields are displayed as hyperlinks in Key Fields.

Dolton, James / ABC Wine Shop Inc.

abc Copy Favorite List Actions Preferences

View Basic Information User-Defined Fields Activities

Name and address

James Dolton
General Manager
ABC Wine Shop Inc.
123 Main Street
Pittsburgh PA 87654
USA

Other information

Phone numbers
Main: [\(604\) 601-8000](tel:(604)601-8000)
Fax: [\(604\) 601-8001](tel:(604)601-8001)

Email addresses / Website
Main: escona@maximizer.com
jdolton@maximizer.com
Website: www.maximizer.com

Key Fields for: General Customer

Primary Interest	As an agent/distributor	Do not solicit by	
Last Visit	April 13, 2011	Category	Partner
Preferred Language	English	Reports To	Ed Johnson
Contact How?	Email	Full Access	Public
Annual Sales		Read Access	
First Contacted Date	February 9, 2011	Partner	
		Sales Lead	No
Linkedin Profile	www.linkedin.com/james_do...	Lead status	
Facebook	www.facebook.com/james_...		

Edit OK Cancel Apply

Clicking the link will open the web page in a new browser screen.

Ability to display currency symbols for numeric user-defined fields

You can now specify that a currency symbol is displayed in numeric and formula user-defined fields. The currency symbol will appear in Key Fields, user-defined fields, column setups, column reports, export to Excel and dashboards. If multi-currency is not enabled, the currency symbol is based on the culture setting of the local machine. If multi-currency is enabled, corporate currency symbol will be displayed.

Numeric Field Properties

Folder Name: Sales

Field Name: Annual Sales

Attributes

☐ Set to hidden

☒ Show currency symbol

Decimal places: 2

Full access: Public

Read access: Public

Field may be added to

☒ Companies

☐ Individuals

☒ Contacts

A new setting is added for displaying a currency symbol for numeric user-defined fields.

Columns: *Default Address Book View

Name	Phone Number	Email Address	City	State	Department	Division	Annual Sales
ABC Wine Shop Inc.	(604) 601-8000	escona@maximizer.com	Vancouver	BC	Sales		\$5,500,000.00

ABC Wine Shop Inc.

1006 West 10th
Vancouver BC 2R3 5Y5
Canada

Other information

Phone numbers

Main: (604) 601-8000

Fax: (604) 601-8001

Cell: (604) 601-8002

Pager: (144) 564-7778

Email addresses / Website

Main: escona@maximizer.com

Alternate:

Home:

Website: www.maximizer.com

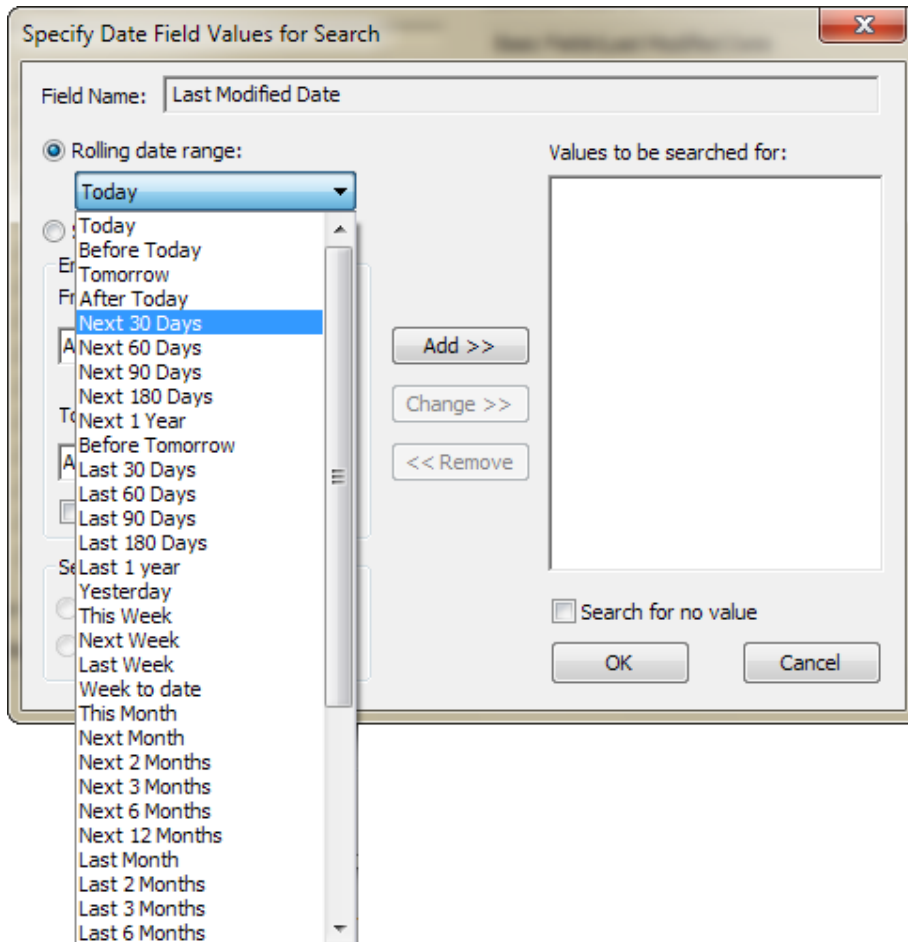
Key Fields for: General Customer

Primary Interest		Do not solicit by	
Last Visit	July 29, 2011	Category	Partner
Annual Sales	\$5,500,000.00	Territory	North / Int'l
Retail Wine Cost		Territory Status	Set by rule
Region	CAN - West	Account Manager	Billie Holly
Industry	Retail Sales	Full Access	Public
Size of Client	Small	Read Access	
First Contacted Date	February 1, 2009	Partner	
		Sales Lead	No

The currency symbol is displayed in Key Fields and column setups.

More options for rolling date ranges in searches

More options are available for rolling date ranges when searching a date field. The new ranges include: after today, next 30, 60, 90, 180 days, next 1 year, last 30, 60, 90, 180 days, last 1 year etc.



Option for rescheduling Action Plan activities

If you change the date of an activity in a dependent Action Plan, you have the option of rescheduling all the in-completed activities based on the number of days earlier or later the activity is moved.

Ignore past appointments when retrieving unfinished activities

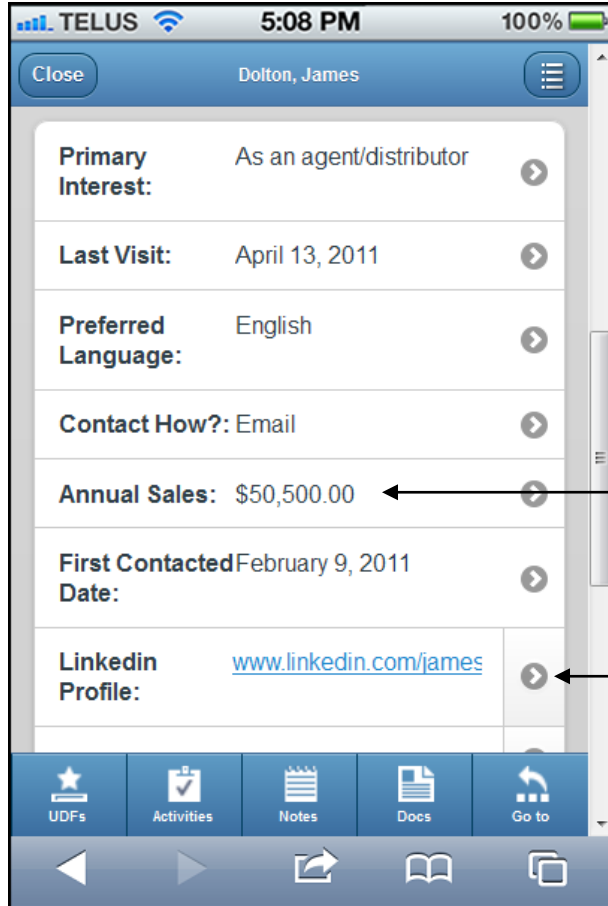
If you turn on “Carry Forward Unfinished Activities”, only the overdue tasks will be retrieved. The in-completed appointments in the past won’t be displayed. The label for the option has been changed to “Carry Forward Unfinished Tasks”.

Maximizer CRM Mobile Access

URL type of alphanumeric user-defined field and currency symbol for numeric user-defined fields

If you specify an alphanumeric user-defined field to be displayed as a hyperlink in Web Access, it will be displayed as a hyperlink in Mobile Access as well.

If you specify to show currency symbol in a numeric field in Web Access, the currency symbol will be displayed in Mobile Access as well. The symbol is based on the culture setting on the mobile device.

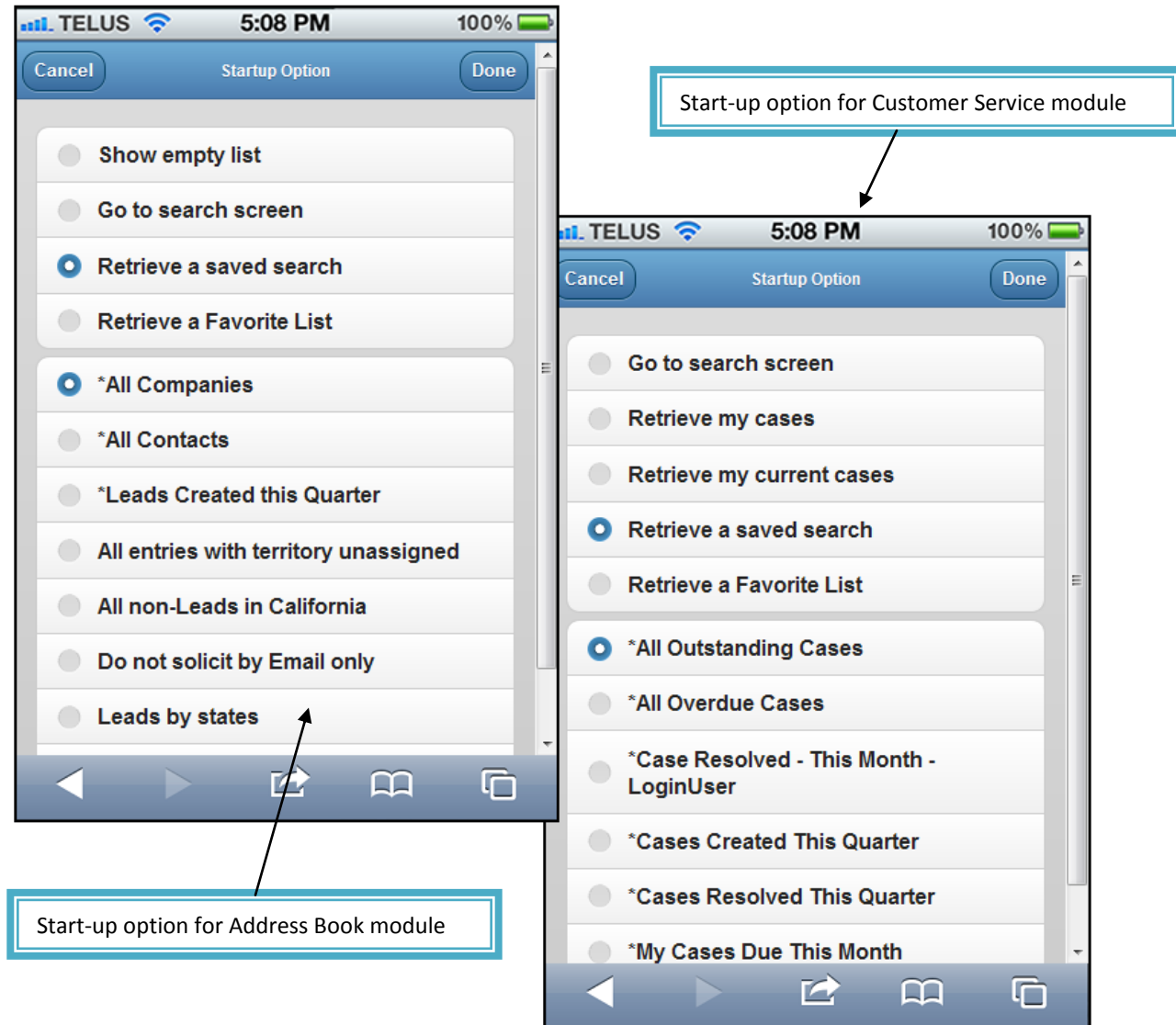


Display the currency symbol in a numeric user-defined field.

Display alphanumeric field as a hyperlink - Pressing the link will open the web page. Pressing the arrow button will open the screen for editing the URL.

Automatically retrieve a saved search or a Favorite List when a module is open

You can now automatically retrieve a list of entries when opening the Address Book, Opportunities or Customer Service module. You can set the start-up options through the Actions menu.



Support retrieving my cases and my current cases in the Customer Service module

In the search screen in the Customer Service module, you can now retrieve “my cases” or “my current cases”.

Update UI for assign, resolve, and escalate case

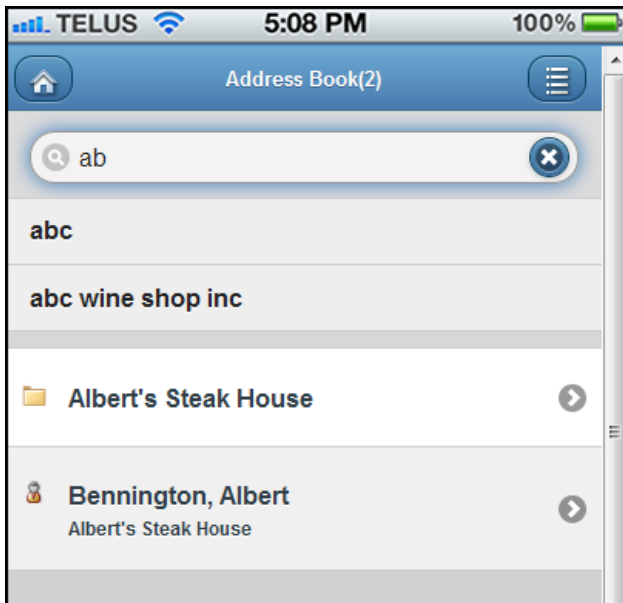
The user interface for assign, resolve and escalate cases has been updated.

Reposition the address field in the Address Book entry screen

In an open Address Book entry, the address is moved to the top of the screen and displayed as a hyperlink. Pressing the link will show the address in Google Maps.

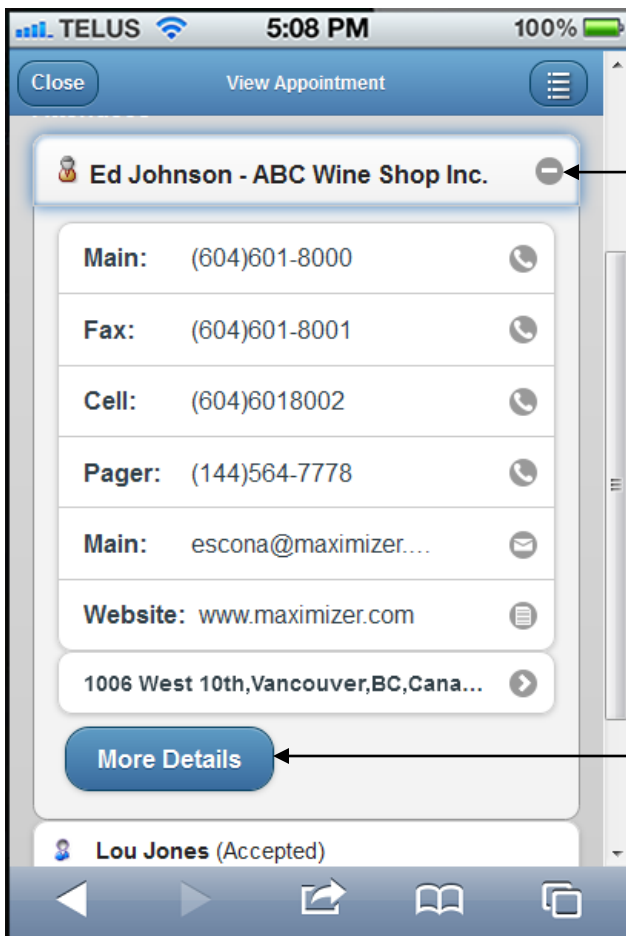
Quick search shows previously searched entries

When you type in the Quick Search field, a list of previously searched strings that match the search text will be displayed. You can quickly select a search string, instead of re-typing it again.



Show Address Book entry's contact information in an appointment

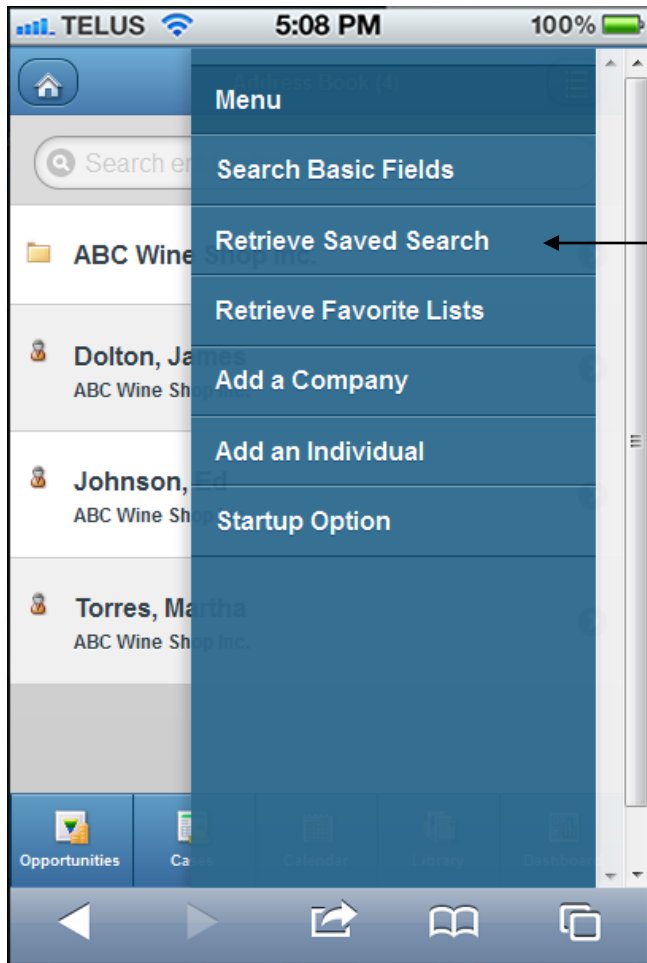
When viewing an appointment, the contact information of an Address Book entry, including phone numbers, emails and address, is now available.



Pressing the plus button shows the phone numbers, emails and address of the Address Book entry. You can make a call, send an email or check the location.

Pressing More Details button will open the Address Book entry for you to view more information about this entry.

New slide out menu



The new slide out menu provides better performance

Prompt for notification email after saving an appointment

Depending on your Preferences in Web Access, you may be prompted to send an email notification to other users and Address Book entries after you save an appointment in Mobile Access.

Support email signature

Mobile Access now supports email signature. The email signature needs to be set up in Web Access.

Improved find free time

Find free time function has been improved in Mobile Access. You can now find out exactly who is busy, or which location is occupied in the selected day.

Microsoft Outlook Add-on for Maximizer CRM Web Access

Support synchronizing tasks

You can now synchronize selected tasks between the Maximizer Address Book and Microsoft Outlook. You have the option to synchronize the "Carry forward unfinished tasks".

Notify the user about changing password

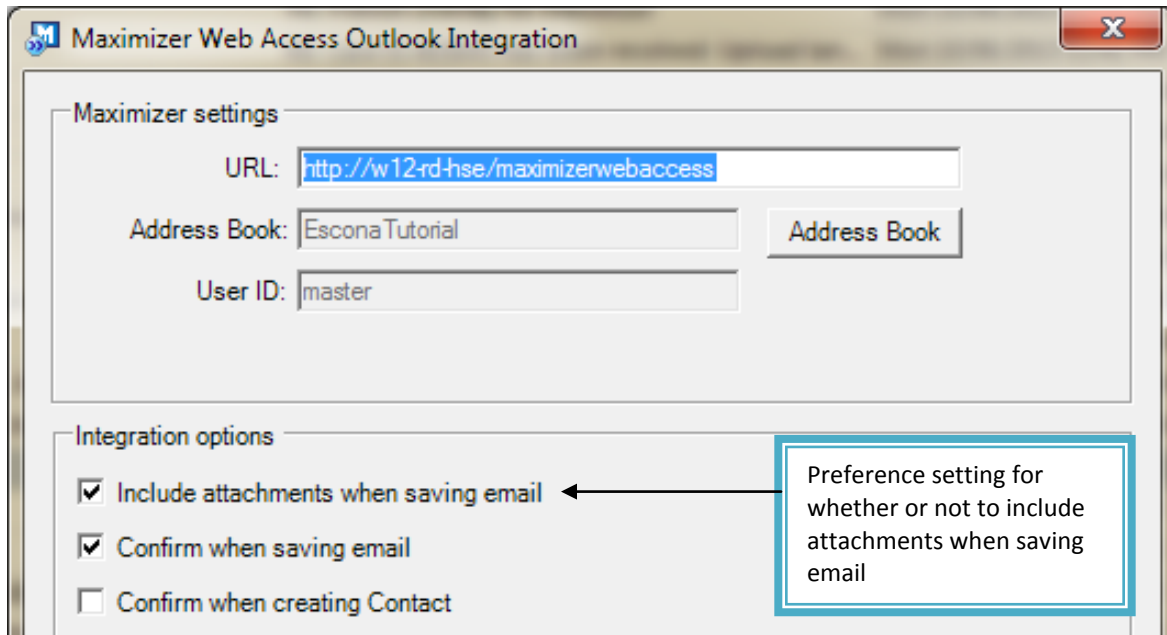
If your password for Web Access has been changed, you will get prompted in Outlook to update your password in the Outlook add-on.

Notify the user about new release

If a new release of the Word/Outlook add-on has been deployed on the server, you will get prompted to install the new release on your workstation.

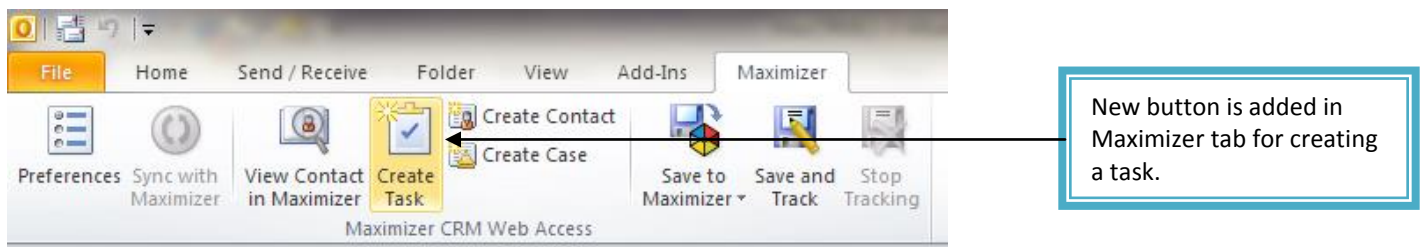
Allow saving an email without including attachments

You can now save an email to a Maximizer entry without including the attachments. The option is available in the Preferences and in Wizards.



Ability to create tasks based on email

You can now create a task in Maximizer based on an email in Outlook. The Maximizer Address Book entry with matching email address will be detected and you can create a task for that entry. You can assign the task to another Maximizer user and send an email to notify that user.

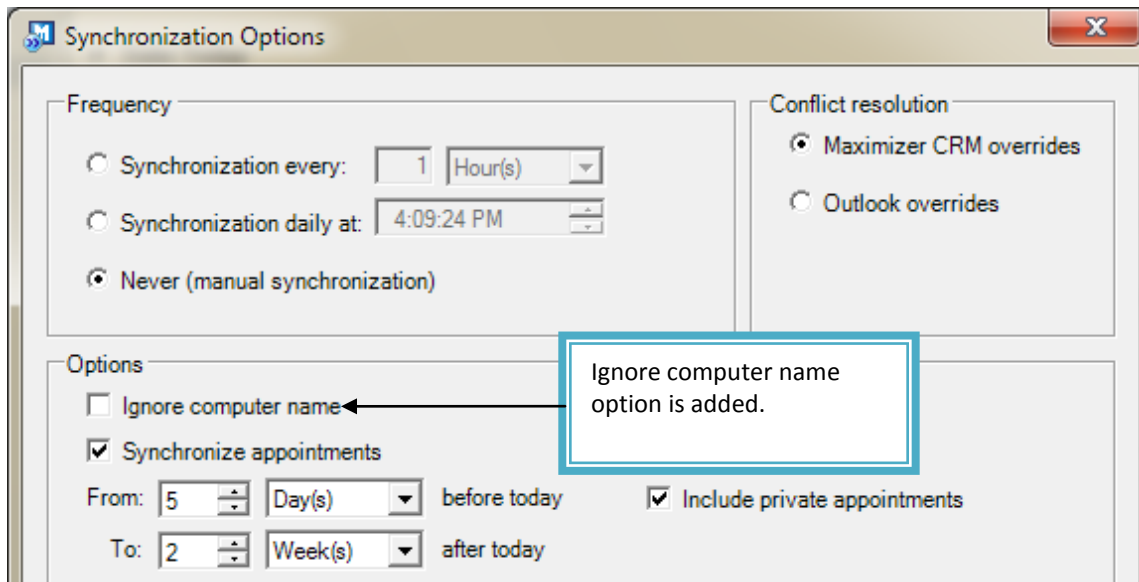


Save multiple emails to a Maximizer entry at once

You can now select multiple emails in Outlook and save them to a Maximizer entry at once.

Support "Ignore computer name"

Outlook Add-on for Web Access now supports "Ignore computer name". This option will cause the Outlook Sync to be performed without respect to the computer you are using. Reasons for using this option include moving to a new computer to which you have copied your existing Outlook data, and operating in a Citric Terminal Server load balanced environment. If you use multiple computers and sync to different Outlook profiles on these computers, do not use this option. This option is only available in Preferences, but not in setup wizard.



Database API

Improve search capability for Web Data Access API

We have created a more flexible parameter format for searching and inserting/updating records.

New supported products

- Windows 8 RT
- Office 2013
- Office 365 (Desktop Version) ¹
- Mobile Access supports BlackBerry Z10

1. Outlook email compose dialog is not supported in Windows Access.

Fixed in Maximizer CRM 12 Summer 2013

Installation doesn't allow users to install on top after failing to remove previous version

When upgrading from a previous version of Maximizer, the installer may be unable to uninstall the previous version. In this scenario, the installer now instructs users to stop the installation and manually uninstall the program using Add/Remove programs. Previously, the installer gave users the option of installing on top of the old version, which would cause problems with the new installation.

The Notes window now displays all notes properly in the Custom Window Layout

When using a Custom Window Layout, the Notes window now displays all notes when it's first opened. Previously, the Notes window would require a refresh to display the notes when the window was first opened after not being displayed.

Only embedded documents are included in document conversion

When you use the Convert Embedded Documents command, only embedded documents are included in the conversion. Previously, linked documents were also converted, ruining the existing links and creating garbage files.

Sending email templates containing in-line images is error free in Internet Explorer 8

In Web Access or Maximizer CRM Live, you can send email from a template containing in-line images without any error messages. Previously, a JavaScript error would display in Internet Explorer 8.

Importing a Contact with a blank address does not affect the address of the Company

In Web Access or Maximizer CRM Live, you can import a .CSV file containing a Contact with a blank address without affecting the address of the parent company. Previously, the address of the Company would be overwritten by any empty address fields for the Contact in the .CSV file.

Images are now properly added to campaign templates in Web Access

In Web Access, you can now add images properly to campaign templates. Previously, images would not display after being added.

OLE documents can now be opened properly in Web Access

If your database contains OLE-type documents, you can now open them properly in Web Access. Previously, an error message would display when trying to open the documents.

User-defined fields in subfolders are imported properly

In Web Access or Maximizer CRM Live, you can import .CSV files that map fields to user-defined fields in sub-folders. Previously, user-defined fields in sub-folders wouldn't map correctly to the fields in the file, so they wouldn't get imported.

User-defined field folders with the same name are properly displayed in Key Fields preferences

In the Key Fields preferences in Web Access Administrator, user-defined field folders with the same name are now properly displayed. Previously, if your folder structure contained multiple folders with the same name embedded under other folders, only the first folder would be displayed in the Key Fields preferences, so you wouldn't be able to select user-defined fields contained in the other folders with the same name.

The Insert Fields dialog box displays properly in Internet Explorer 8

When you add a field to a column setup, the Insert Fields dialog box now displays properly in Internet Explorer 8. Previously, the OK and Cancel buttons were not displayed in the dialog box, so it was impossible to insert a field in a column setup.

Quick search handles long strings of numeric characters

The quick search feature now handles long strings of numeric characters. Previously, a search for a string consisting of more than five numbers would not return any company names matching the string.

Adding a Contact in Web Access uses the parent Company's Full/Read access values

When you add a Contact in Web Access, the Full access and Read access fields now default to the same values as in the parent company. Previously, the fields would default to the values set in the default entry. The current behavior is the same as in Windows Access.

Slovenian characters now sort properly in Web Access

In Web Access, Slovenian characters are now sorted properly when you have Slovenian language and locale settings specified in the database, web.config file, and preferences. Previously, the characters would be displayed properly, but they would sort in the incorrect order.

Copying properties from an existing user to a new user does not overwrite changes to user-defined fields

When you create a new user and choose to copy properties from the selected user, including user-defined fields, you can modify the user-defined fields of the new user and save the changes. Previously, any changes to the user-defined fields in the new user would get overwritten by the user-defined field values in the original user.

AMGR_Appointments Insert trigger now always creates appointments with unique IDs

If you are using the AMGR_Appointments View to insert appointments, the Insert trigger now always creates records with unique Appointment_Id values. Previously, it would create records with duplicate Appointment_Id values if two different users would create an appointment at the same date and time.

Contacts are properly displayed in open Address Book entries in Partner Access using Firefox

In Partner Access, the Address Book entry dialog box now properly displays all Contacts associated with the entry on the left side of the dialog box. Previously, the Contacts were not displayed in Firefox.

Zip/Postal Code is now automatically set to upper case in Web Access

In Web Access, when you enter a value in the Zip/Postal Code field, the field is now automatically set to upper case. The current behavior is the same as in Windows Access.

Correct time always saved for follow-up deadline in new customer service cases

If a default follow-up deadline for customer service cases is not set in your Address Book, the time value for the follow-up deadline is now saved properly when you create a new customer service case. Previously, changes to the time part of the follow-up deadline would not get saved and it was difficult to select the time field afterwards to change it.

Documents are properly downloaded on Android devices

In Mobile Access, you can now download documents properly on devices running the Android operating system.

Malformed hyperlinks now display properly in Web Access

In Web Access, any garbage characters are now stripped out of malformed hyperlinks entered by users, so the web pages will display properly. The current behavior is the same as in Windows Access.