



## RELEASE NOTES

FOR

ADVANCE CLIENT RELATIONSHIP MANAGEMENT VERSION 2.3



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## Introduction

This release extends CRM 2.2 and is called CRM 2.3. It includes all corrections made since V.2.2.

If you are new to CRM, please make sure you review the on-line help.

The following convention is used throughout this document:

- ★ Enhancement
- ✓ Correction

## Opportunity Console

- ✓ When adding an opportunity, where the milestone start/end date is part of the attributes on the addition of the matter, if the date was edited, the application did not apply this date. The work around meant that you needed to use the Milestone page on the Opportunity Console or the Workflow page on the corresponding Matter record using the Matter Console to re-enter the date.
- ✓ Create a new prospect via the Add Opportunity Wizard did not set the Mailing Name, Debtor Type or Statement Type fields.
- ✓ Adding a new opportunity failed if a DSNless connection string was used and audit triggers were set on the Matter table.

These have been corrected.

## Events Console

### Attendee Data

- ✓ Some attendee data was not saving when added to an event. This was caused by the use of apostrophes at the end of a field or in a field on its own. Once this happened, it corrupted the data that was stored and any future data on this attendee would not be saved. Please be aware that if this has already happened to you, then we have provided a small application that will fix the attendee data structure for any corrupted data – please refer to KB 8874.
- ✓ Export Attendee data – it was possible to generate a .NET error if this option was used BEFORE Attendees had been accepted. This was NOT a valid action and has been removed.

These have been corrected.