



SARATOGA

Release Notes

Version No: 7.2 Service Pack 1

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Introduction

The following Release Notes describe new features, important release information, and issues resolved in Saratoga CRM 7.2 Service Pack 1.

Important Notices

- The issues that are fixed in 7.2 Service Pack 1 are available with the 7.2 build.
- 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 Service Pack 1: 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 Service Pack 1 will not be available to users on 6.9.0 or earlier versions. If a 7.2 Service Pack 1 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 Service Pack 1 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 7.2 Service Pack 1 from Saratoga CRM 6.8.2 or above. If the current version of Saratoga CRM that is installed is version 6.8.1 Hotfix 3 or earlier, this installation requires an uninstall of all Saratoga versions first, followed by an installation of version 7.2 Service Pack 1.

- **It is recommended that the DVF, SCHEMA.DBD, and RPT files and the SCRMO Outlook365Manifest file are backed up before upgrading to Saratoga CRM 7.2 Service Pack 1.**
- Change of behavior for Rich Client Reports assigned to a Web Group: Rich Client has Run at Open check box 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.
- **For Thin Client, Form Center, and Mobile Client, 32-bit installers are phased out and are no longer available.**

Issues Addressed in Saratoga CRM 7.2 Service Pack 1

The following issues are addressed as part of the Saratoga CRM 7.2 Service Pack 1.

Saratoga CRM

Thin Client

- If an appointment had been previously sent from Saratoga Thin Client to Office 365 and it was sent again a second time, a duplicate of the appointment was being created, instead of updating the original appointment.
- If a contact had been previously archived from Office 365 to Saratoga Thin Client and it was archived again a second time, a duplicate of the contact was being created, instead of updating the original contact. The same was true when sending contacts from Saratoga Thin Client to Office 365.

Known Issues in Saratoga CRM 7.2 Service Pack 1 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.