



Sage CRM Connector for Sage X3

Release Notes

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Contents

Overview	4
Sage Connector 2.2	5
Compatibility	5
Release date and files included	5
Functional change requests	5
Sage Connector 2.1	6
Compatibility	6
Release date and files included	6
Issues resolved	6
Functional change requests	7
Cosmetic change requests	7
Sage Connector 2.0	8
Compatibility	8
Release date and files included	8
Prerequisites for this release	8
Enhancements	9
Issues resolved	10
Functional change requests	11

Overview

This document provides information about enhancements implemented, issues addressed, and issues known to exist (if any) in the Sage Connector release.

Sage Connector 2.2

Compatibility

Sage Connector 2.2 is compatible with:

- Sage CRM version 7.3, 7.3 SP1, 7.3 SP2, and 7.3 SP3.
- Sage X3 version 6.5, version 7, PU8, and PU9.

Release date and files included

Release date	Files included
August 2016	SageCRMConnector.exe For more information, see the Sage CRM Connector for Sage X3 Installation Guide.

Functional change requests

- **Sage X3 Customer Account records with no contacts** are skipped during synchronization and a notice of the skipped records is written to the migration log.
- **A license key is no longer required** to use Sage CRM Connector for Sage X3 with Sage CRM.

Sage Connector 2.1

Compatibility

Sage Connector 2.1 is compatible with:

- Sage CRM version 7.3, 7.3 SP1, and 7.3 SP2.
- Sage X3 version 6.5, version 7, PU8, and PU9.

Release date and files included

Release date	Files included
June 2016	SageCRMConnector.exe For more information, see the Sage CRM Connector for Sage X3 Installation Guide.

Issues resolved

Issue ID	Description
0-167423	Updating the email address of a Company record in Sage CRM caused the email address on all associated Customer record addresses in Sage X3 to be overwritten. This has been fixed so that when the email address of a Company record in Sage CRM is updated, only the email address on the default Customer record address is updated.
0-167539	Updating the phone number of a company record in Sage CRM caused the phone number on all associated customer record addresses in Sage X3 to be overwritten. This has been fixed so that when the phone number of a company record in Sage CRM is updated, only the phone number on the default customer record address is updated.
0-167314	Updates have been made to the Account Migration Service file that allow the user to perform synchronization from the command line.
107-17487	A bug in Sage X3 PU9 returns invalid data when no data should be returned. A defensive check on account migration has been implemented to prevent this issue impacting data quality in Sage CRM.

Functional change requests

- The default Address Country Code is now assigned to contacts when posting a new Company from Sage CRM to Sage X3. This allows phone numbers assigned to a Person to be posted to Sage X3 when the **X3 Phone Updates** value is set to **True** in the Web.Config file.
- Phone numbers are no longer padded to 10 characters using '-' because this prevents Sage X3 validating a phone number that's been sent from Sage CRM.

Cosmetic change requests

- When trying to set the **Address Type** of an address, a warning is now saved in the log file. Previously an error was saved in the log file even though an error had not occurred.

Sage Connector 2.0

Compatibility

Sage Connector 2.0 is compatible with:

- Sage CRM version 7.3 and 7.3 SP1.
- Sage X3 version 7, PU8, and PU9.

Release date and files included

Release date	Files included
January 2016	SageCRMConnector.exe For more information, see the Sage X3 Connector Installation Guide.

Prerequisites for this release

You must set the grid size and date format in Sage CRM for each user that uses the Sage X3 Connector.

1. In Sage CRM, click **<My Profile> | Administration | Users | <User> | User Preferences**.
2. Click **Change**.
3. In the Login and Session Preferences panel, set **Grid Size** to *10*.
4. In the Date/Time Preferences panel, set **Date format** to *dd/MM/yyyy* or *mm/dd/yyyy*.
5. Click **Save**.

Enhancements

- Multilingual installer. For more information, see the Sage X3 Connector Installation Guide.
- Field captions are downloaded for multiple languages.
- Installer update to include accounting system selection.
- Installer allows separate installation of gateway on servers.
- Gateway URL can be set for gateways installed on separate servers.
- Multiple address synchronization.
- New multiple address list on customer summary screen.
- Multiple contact synchronization.
- Site lookup field for quotes and orders.
- Line items for quotes and orders are maintained in persistent form during validation errors.
- Licence date changes.
- New version option in web.config.
- New option in web.config to allow person email address and phone numbers to be posted to Sage X3.
- Contact phone number mapping changed to business phone instead of mobile phone.
- Field mappings revised and streamlined for ease of use.
- Field mappings changed so website can be set for every Sage X3 address record.
- Territory is set on a company record based on the user home territory of the account manager.
- OnChange scripts enabled for advanced search select.
- Last synchronization date can be set interactively.
- Site lookups are available on interfaces.
- Address list is displayed on Account details screen.
- Address codes can be completed in Sage CRM before synchronizing accounts with Sage X3.
- AccountMigrationService runs synchronization in chinked mode similar to interactive AccountMigration.
- Schema caching enabled to improve performance during synchronization and account migration.

Issues resolved

Issue ID	Description
103-17092	The Active flag was incorrectly set to <i>Enabled</i> when an inactive CRM company was synced to Sage X3.
103-17090	The Status field was blank on a synced X3 company record in Sage CRM.
103-17088	The default address was not updated on an X3 customer record.
103-17086	The Mailing prohibited checkbox on an X3 customer record was incorrectly unchecked when Mail Restriction was set to Yes in Sage CRM.
103-17107	The contact salutation was not updated correctly.
103-17062	When a person was added to a company record in Sage CRM after the company was synchronized with Sage X3, the customer address was overwritten with the contact address.
0-17032	When a new customer record was posted from Sage CRM to Sage X3, the customer email address and contact email address were blank in Sage X3.
0-17025	A new order did not include the correct line items field.
0-16996	Ship-to addresses were deleted in Sage X3 when a change was made to a related customer in Sage CRM.
0-16908	It was not possible to use non-default gateway methods.
0-16753	The address description and type for the default address on a new record were not synced from Sage X3 to Sage CRM.
0-16751	When a new customer record was posted from Sage CRM to Sage X3, the email address field was blank in Sage X3.
0-16750	When a new customer record was posted from Sage CRM to Sage X3, the address description and type were blank in Sage X3.
0-16748	When a company record with multiple addresses was posted from Sage CRM to Sage X3, duplicate address records were created in Sage X3.
0-16744	When a US customer record with a contact and phone number was posted from Sage X3 to Sage CRM, the contact phone number was blank in Sage CRM.
0-16730	When a company record was posted from Sage CRM to Sage X3, an additional address line was created in Sage X3.
0-16656	The date format appeared incorrectly on a US local server after account migration.
0-16745	A synchronization error occurred when adding a new person to a synchronized company in Sage CRM.
0-16831	Captions were corrupted when metadata tables were recreated.
0-17128	When tables were created for Sage X3, the Sage CRM web service flag was set to true.

Functional change requests

- Allow processing of new text-based ISO timestamps from Sage X3.
- Improve the lookup display for Chrome and IE.
- Allow lookups on screen objects.
- Improve the generic lookup function to make it easier to add lookups.
- Reflect changes to the default address in Sage X3 and Sage CRM when synced.
- Automatically convert sales site and shipping site values to upper case.
- Post company website correctly to from Sage CRM to Sage X3.