Release Notice: 8.6.16

KEY CHANGES IN RELEASE 8.6:

- Includes support for the new WordPress Portal: *1CRM Customer Connection*. **Note:** This portal plugin can be freely downloaded, but needs a portal subscription to operate.

- A new *Subscriptions* module is added, allowing 1CRM to manage your client subscriptions for monthly or annual services - anything from the Sock of the Month, to Newsletters or Software. (Customer subscription self-management is available in the Customer Connection Portal.) This includes an integration with the Chargebee billing system. The Subscriptions module is accompanied by related new modules for *Plans*, *Addons*, *Options*, *Coupons* and *Customer Levels*, which combine to provide the overall Subscriptions solution.

- A new WooCommerce integration (Enterprise Edition only) syncs client and invoice data from Woocommerce online sales into the CRM. And syncs catalog data and order status 2-way between the CRM and the WooCommerce store.

- A new integration with the WordPress plugin Booking Calendar.

- Zapier integration project Phase II - integration with accounting systems, including QuickBooks Online and Xero.

- Two-Factor Authentication (2FA) - Compatible with Microsoft Authenticator, Google Authenticator, and other popular smartphone apps.

- *Milestone Billing* feature allows you to easily collect initial deposits and intermediate milestone payments while delivering on an order – then generate the final milestone invoice with a single click.

- A new *Revenue Forecast* feature allows the projected income from an opportunity to be modelled as an income stream rather than a single event, with revenue events optionally related to specific products. The value of the Opportunity may be calculated from those products, and they are added automatically when converting the Opportunity to a Quote.

- A new *User Tracking* solution has been added, with reports showing the time users spend in the system, and the number of records viewed or edited.

- A new *Commissions* module is added, allowing 1CRM to calculate and report on sales commissions based on percentages of gross profit or total sales. Aggregate commissions on a sale may be split across multiple sales staff.

- The *Knowledge Base* module is substantially updated, adding knowledge base categories, and obsoleting the use of Tags. (Customers can search the Knowledge Base in the Customer Connection Portal using full text searches, and browsing by Categories.)

- A new *Storage Utilization* screen is added, showing available or allocated storage, free space, and usage categories. Notifications may be sent for low free space, and regular storage utilization reports can be generated automatically.

- For Developers: The 1CRM REST API capabilities have been extended, and the Developer Guide content expanded to cover Webhooks

- Major open source libraries are updated, including TC/PDF and SabreDAV.

- Google Maps integration significantly upgraded, including the ability to display multiple selected Accounts, Leads or Contacts on a common map, with identifying pop-up data displayed for each.

- Full text search added for Notes.

Changes in 8.6.16:

- *Email Campaigns:* Explicitly set the host name for outbound emails, to enhance deliverability. (#4757)
- *Command Line Installation Process:* Support setting the default language when installing using the command line process. (#4746)

- *Google Calendar Sync*: Support added for the latest Google API usage rate limits. (#4707)
- *Price Books*: Price Book pricing formulas must use North American number formatting i.e. 123,456.89. Using European number formatting will now explain this is not supported. (#4730)
- *Report Data Grouping*: A minor issue when grouping data in reports has been corrected. (#4719)
- *Email Template Variables*: Minor feature added - now values from Projects and Project Tasks may be used as email variables for data insertion. (#4767)
- *Google Calendar Sync*: Using Zoom meeting links and Google calendar sync together caused some issues, which have now been resolved. (#4709)
- *PDF Options:* Minor option added, allowing Contact Name to be displayed below the Shipping Account name instead of above it. *(#4758)*
- *Reports:* For reports using multiple source tables, Mass Update capability was not enabled. This has now been enabled. (#4773)
- *Timesheets QuickSearch:* Minor issue corrected. (#4784)
- *Sales Orders with Multiple Line Item Groups*: Changing Billing Account to one with a default discount would cause an issue, which has now been addressed. (#4716)
- *WooCommerce Sync and Workflows*: Workflows which involved Invoices generated from the WooCommerce sync had issues which have now been resolved. (#4691)
- *WooCommerce Sync*: Flexibility enhanced handling custom Woo order stages from Woo plugins. (#4711)
- *Access Control*: Deleted Teams could still affect clients' Access Control. Issue has been resolved. (#4748)
- *Product Specific Discounts*: Additional minor fixes added after the significant changes in release 8.6.15. (#4747)
- *Cloned 1CRM Instances:* Instances created by engineers cloning another instance could have issues with chart generation. These have now been resolved. *(#4762)*
- *Google Contacts Sync:* Google suddenly deprecated the Contacts API used by 1CRM. We have now updated the libraries used for Google sync to address the issue. (#4726)
- *CalDAV and iOS 15:* Authentication issue that arose with iOS 15 has been addressed. (#4745)
- *1CRM System Maintenance*: Feature aded to delete all Invoices. This is to address the need of new clients who create test invoices prior to live system usage - as now 1CRM does not permit individual Invoices to be deleted. (#4728)
- *Emails sent by Workflows*: Emails sent by Workflows would drop their attachments. This issue has been resolved. (#4733)
- *Workflows Feature*: A new trigger option has been added to Workflows - *Occurs When*. (#4721)
- *Google Calendar Sync*: A date limit option has been added to Google Calendar sync, to avoid sync'ing years of historical events. (#4720)
- *Support for .ics Files*: A *Schedule Meeting* button has been added when emails contain .ics file attachments. (#4715)
- *WooCommerce Sync:* Add Shipping Account details to incoming WooCommerce orders via sync. *(#4714)*

Changes in 8.6.15:

- *Access Control:* Improved the effectiveness of the Access Control setting for *User can see Project Financials*. (#4678)
- *Workflow Conditions:* Workflow condition for a field being *Empty/Not Empty* had an issue which has been corrected. (#4698)
- *Discounts*: The feature allowing Discounts to be defined for *Selected Products Only* was not working properly, and has been corrected. (#4686)
- *Reports*: Reporting on a Date/Time field, using the option to show only the Time portion of the field, could have a time zone issue in certain cases related to daylight savings. Issue corrected. (#4682)
- *Payments from Refunds*: When creating a payment from a credit note using the Refund Credit option, amounts were calculated incorrectly if the Euro number format was in effect. Issue corrected. (#4697)
- *1CRM Client App*: When printing a Quote to PDF in the 1CRM Client app using the *Open as PDF* option, there was an issue downloading the PDF which has now been corrected. (#4690)
- *PDF Form Designer*: Minor issues corrected with column alignment when using borders on tables. (#4688)
- *Recurring Meetings:* Issues corrected with generating recurring meetings with certain date formats. *(#4689)*

Changes in 8.6.14:

- *Account Lifetime Revenue:* A new feature - Lifetime Revenue field added to the Sales tab for each Account, showing the historical total of all invoices to this Account. (#4651)
- *System Search:* Added the ability to search the entire system for values in custom fields. When creating a custom field simply check the new Unified Search toggle to include the field in system search. (#4652)
- *Business Card Scanning*: The 1CRM Client App for iOS, iPadOS and macOS has been updated to support business card scanning using the CamCard API. This release adds support for defining your API key for CamCard on the Admin - System Settings screen. (#4670)
- *Date Filters on Smart List Tabs, Reports*: More comparison operators were added, allowing dates to be filtered for *Before Today* and *After Today*. (#4647)
- *Salesforce.com Import Profile*: When performing data imports a new profile may be selected for *Salesforce.com CSV*. This profile will establish data-object relationships based on the salesforce ID in the CSV data. (#4656)
- *Email Campaigns*: Improvements to bounce handling, adding support for independent values for Reply-To and Return-Path. (#4676)
- *Email*: Exempt Portal-Only users from being auto-associated with incoming emails. (#4645)
- *WooCommerce Sync:* Enhanced the sync to ensure Contacts and Accounts synced to 1CRM from WooCommerce are always related to each other, as well as to the invoice or sales order. *(#4669)*
- *Quotes, Invoices*: Ensured that comment line items related to a real line item are always reportable via Reports as well as via the API. (#4654)
- *Create Shipping Record from Sales Order:* When performing this conversion, the line item names used were the names normally used for suppliers (Purchase Name on Catalog items), not customers. Issue now corrected. (#4655)
- *Forum Posts & Replies:* Minor enhancements made to the Forums module to improve the display of threaded posts and replies. (#4639)
- *Private Meetings:* Ensure that all users set as participants in a meeting marked as Private can still see it in their 1CRM Calendar. *(#4662)*
- *Tasks:* When duplicating a Task the duplicate now has its Status set to *Not Started*, overriding the Status of the original Task. (#4666)
- *Convert Opportunity to Quote*: When performing this conversion, the first line item group name was always set to *Revenue Forecast Products*, even if no revenue forecast was defined for that Opportunity. Issue now corrected. (#4657)
- *Converting Sales Order to Purchase Order*: Further improvements to how the Ship To address is set when performing this conversion. (#4668)
- *Sort Accounts by Location*: There was an issue with sorting Accounts by location on the Account list view. The issue has now been corrected. (#4650)
- *Group Email Access Control*: Minor adjustments were made to access control rules for sharing access to Group emails. (#4664)
- *Reporting on Notes*: When using filters in a Report definition based on the Notes module, the label was missing for the field *Email Attachment (Y/N)*. The issue has been corrected. (#4660)
- *Invoices API*: A condition was added for URL param skip_line_items. The endpoint only includes line items if this value is not set or set to 0. (#4638)
- *Event Reminders*: These could not be edited after they were created and saved. Issue now corrected. (#4644)
- *Invitations to Zoom Meetings*: The *.ics* file attachment on these invitations did not properly include the link to the zoom meeting. This issue has been corrected. (#4646)
- *Reporting*: The *Description* field was not shown for multiple report runs linked to a Report. The issue has now been corrected. (#4659)

Changes in 8.6.13:

- *Weather Dashlet*: Yahoo deprecated their Weather API without warning. We have now shifted to using the OpenWeatherMaps API. Unfortunately you will need to get a free API key and enter it on the *Admin - System*

Settings screen. As well you'll need to remove all existing cities, and add back all cities desired. Note: When looking up cities, use the full city name - partial name lookup is not supported. (#4605)

- *Workflow:* Enhanced the *Create Task* action so the new Task is linked to the user and data item causing the workflow to trigger. (#4617)
- *WooCommerce Sync*: This sync has been enhanced to also sync item attributes from WooCommerce to 1CRM Sales Order or Invoice line items. A *Reset Sync Status* button has also been added for use if the sync ever becomes blocked or unresponsive. Robustness and scalability enhancements also have been added. (#4586)
- *Quotes, Invoices:* Enhanced the popup function used when a client is exceeding their credit limit. *(#4600)*
- *Converting Sales Order to Purchase Order*: Setting the *Ship To* address when doing this now has improved flexibility. (#4615)
- *Calendar:* An issue has been corrected with the proper display of Project Tasks on the Calendar. (#4622)
- *Recurring Meetings: Two issues with defining recurring meetings were addressed.* (#4620, #4589)
- *Scheduler:* An issue has been corrected with setting scheduler tasks to run using Business Days as the run interval. *(#4632)*
- *Module Designer:* Issue corrected related to editing fields in the Module Designer to have the *Depends On* property. (#4621)
- *Invoice Locking:* The Default Role disables invoice deletion as of 8.6.12 - but if the admin changed this value in the default Role, it could not be restored. Issue corrected. (#4607)
- *Bugs & the Portal*: The ability to mark bugs not to be shown in the Portal was not working - now corrected. (#4610)
- *Upgrading 1CRM*: Now checks properly for the current PHP version on your server, and blocks the update if not in the range of supported versions. (#4616)
- *Maps in Flex Theme*: The screen layout for google maps in the Flex theme had an issue which has now been corrected. (#4593)
- *Call & Meeting Default Reminders*: User preference for default time for Call or Meeting Display Reminders was not respected when using the popup form (worked fine in the full screen form). Issue now corrected. (#4595)
- *Weight Field on PDFs*: Using the PDF Form Designer to add the *Weight* combined field to a PDF was not working properly. Issue now corrected. (#4603)

Changes in 8.6.12:

- *1CRM Client App:* Full support added for the new [1CRM Client App](#) (available now in App stores for iPhone, iPad and the Mac).
- *Forecasts:* Additional issues with this module were corrected. *(#4566)*
- *CardDAV Sync:* Reliability improvements made to CardDAV contact sync, and the SabreDAV library used for CardDAV updated to version 4.1.5. (#4585)
- *Module Designer:* Issue corrected with custom fields of type Related Record, with related type set to Dynamic. (#4584)
- *Email Templates:* When composing an email, selecting an email template to fill the email body and subject did not work correctly if the popup selection dialog was used. Issue corrected. *(#4580)*
- *Accessibility:* Enhancements to improve accessibility and screen reader support were added, with a focus on the Claro theme and the Chrome browser. (#4507)
- *Assemblies with Attributes:* If the components within an Assembly involved the use of Attributes (such as colour, etc..) then adding the Assembly to a Quote/Invoice would lose the Attributes. Issue now corrected. (#4555)
- *Meeting Participants*: When adding Participants to a Meeting, Info Only and Inactive Users would mistakenly be displayed as options. Issue now corrected. (#4561)
- *Vacations*: Vacation information may now be added for Inactive Users, allowing Vacation tracking for staff without a 1CRM login. (#4562)
- *Credit Notes*: An issue has been corrected for the case of applying a Payment to a Credit Note as an *Apply Credit* payment type. (#4550)
- *CSV Import*: An issue with importing CSV files with the umlaut character in a column name header has been corrected. (#4572)

- *Invoice Locking*: More rigorous controls on the deletion, cancellation and/or editing of Invoices have been added, to cheer up your auditors. More information may be found in the User Guide section 6.3.11. (#4567)
- *Reminder Defaults*: A User's preferences for the default Reminders on new Tasks, Meetings and Calls were not applied when creating these activities from a Contact, Account etc.. using a popup window. This issue has now been corrected. (#4569)
- *API*: An issue with the API was corrected, for the situation of querying models that are not the primary for their related module. (#4563)
- *2 Factor Authentication (2FA)*: User experience issues with the 2FA interface have been cleaned up. (#4559)
- *Calculated Fields*: An issue with the Min/Max functions as used in custom fields of the type *Calculated* has been corrected. (#4529)
- *Exchange Rates*: The sources used for the automated Exchange Rate update service within 1CRM have been changed to use https:// transport instead of http://. (#4547)
- *Calendar Grid Views*: An issue with adding Resources to these grid views has been resolved. (#4551)
- *Lead Conversion*: Lead conversion has been enhanced. Documents linked to a Lead are now linked to the converted Account and Contact. Lead email history is now linked to the converted Account in addition to the converted Contact. (#4548)

Changes in 8.6.11:

- *Tax Codes:* When making a Quote for an Account with a default Tax Code, all line items take that code correctly. But when re-editing that Quote and adding new line items, the default code was not applied. Now it is. *(#4524)*
- *Email Templates:* Issue duplicating an email template with an attachment has been corrected. *(#4518)*
- *Marketing Events:* Quick filter on Event Type on the list view was broken - now fixed. *(#4517)*
- *Forecasts:* Several issues with this module were corrected. *(#4512)*
- *CSV Import:* An issue has been corrected with the import of activity data (Calls, Meetings, ...) related to Leads and Targets. (#4523)
- *Mobile Email:* When accessing 1CRM via a browser on a mobile device, composing emails did not allow for HTML composing - this issue has been corrected. (#4476)
- *Flex Theme*: Inability to edit line item columns in PDF Form Designer while using the Flex Theme has been corrected. (#4508)
- *Tasks*: Create Task button on Activities sub-panels used to bring up the full screen form to create a new Task. It now brings up the popup form, for consistency with the other buttons on the Activities sub-panel. (#4539)
- *Module Designer*: If the module designer was used to edit an existing standard module, and set a default value for a field, that default value was not enforced. Issue corrected. (#4538)
- *Revenue Forecast Table*: Adjustments made to this feature for exchange rate movements when opportunities are in other than the base currency. (#4513)
- *Email PDF Invoices*: (On Invoices List View, *Actions* button) An issue (now corrected) could arise when an Account with an invoice to be emailed had a Contact marked as Accounting Contact and this Contact was deleted. (#4546)
- *Vacations*: The submission and later approval of scheduled Vacations now has a more rigorous workflow. (#4502)
- *Vacations*: When scheduling a vacation the interaction of *Start/End Dates* and the *Days* of vacation taken has been improved. (#4515)
- *Stripe Integration*: Minor issue introduced in 8.6.10 release which added SCA support for Stripe has been corrected. (#4545)
- *Email Campaigns*: The *Email & Notifications Settings* screen has a dropdown control to set *Max emails sent per batch*. An additional batch size option of 25 has been added, as a convenience to help prevent throttling by common email services. (#4536)
- *Email Campaigns*: *Opt Out All* option has been added for Newsletter campaigns. This type of URL allows the recipient to indicate they do not wish to receive any emails at all. (#4540)
- *Sales Orders*: When converting a Sales Order to a Project, Project Amount was set to Sales Order amount including tax. Tax is no longer included. (#4497)

- *Credit Notes*: An issue has been corrected for the case of applying a Payment to a Credit Note as a Refund Credit. (#4495)
- *Invalid Email Addresses*: New maintenance task scans for and reports on invalid email addresses in Leads, Contacts and Accounts. Invalid email addresses can cause issues with syncing Contacts to other systems, such as iOS, Android, Google, Outlook. (#4498)
- *Accounts*: Enhancements to hidden option for Account numbering. (#4522)

Changes in 8.6.10:

- *Holidays:* Added holidays for the Canadian province of Quebec. *(#4490)*
- *API:* Added documentation re date filters. *(#4488)*
- *Stripe Integration:* Added support for mandated SCA (2FA) regulation in Europe which becomes effective Jan 1, 2021. *(#4161)*
- *Email:* Added Auto BCC Detection Option. *(#4487)*
- *Serial Numbers*: Copy serial numbers to supported products when they are auto-created on invoice creation and serial numbers option is enabled. (#4482)
- *Knowledge Base*: Corrected potential error when working with Cases related to Knowledge Base articles. (#4485)
- *Accounts*: Added hidden option for Account numbering.

Changes in 8.6.8 / 8.6.9:

- *Dashboards: Saving chart options on custom dashboards had an issue which has now been corrected.(#4478)*
- *Campaigns:* Opening a campaign record via the Last Viewed link caused a display issue when using the Spectrum theme. Issue corrected. *(#4475)*
- *CSV Reports:* Minor issue corrected related to user adding duplicate or empty fields in a CSV version of a report. *(#4474)*
- *DB Issue on Clean Install:* Regression in 8.6.8 corrected. *(#4477)*
- *Quotes*: Ensure maximum length of Subject text is the same for Quotes, Invoices, Sales Orders, Opportunities. (#4463)
- *Leads, Contacts*: Ensure all phone number fields are available for selection to add to custom PDF layouts for Leads & Contacts. (#4457, #4444)
- *Phone Number Search:* Enhancements to phone number search throughout the system. (#4447)
- *HTML Formatter Bar:* Minor bug fix for certain controls when formatting email text in a popup window. (#4442)
- *Import Data:* SugarCRM data import options retired (#4435)
- *Recurring Meetings:* Certain intervals for recurring meetings had issues, now corrected. (#4358)
- *User Activity Logging/Reporting*: Minor issues corrected. (#4432)
- *Developers:* Added documentation for the use of filters within the API. (#4431)
- *Zapier Integration*: Major enhancements to Zapier integration for sync with accounting systems such as QuickBooks Online, Xero. (#4427, #4426)
- *Integromat Integration*: Major enhancements to Integromat integration for sync with accounting systems such as QuickBooks Online, Xero. (#4430)
- *Revenue Forecast Table*: Enhancements added to this feature. (#4417)
- *Product Attributes*: These were not added to Quotes, Sales Orders etc.. when adding multiple catalog products in a single operation. The issue has now been corrected. (#4412)
- *PDF Form Designer*: Had an issue setting custom fonts for line items on Quotes, Invoices, etc ... This issue has been resolved. (#4415)
- *Subscriptions*: Major enhancements to the Subscriptions module, and its support in the Customer Connection portal.
- *Customer Connection Portal:* Added support for additional fields in the Cases module. (#4410)

- *Customer Connection Portal:* Knowledge Base articles have a *Show in Portal* flag which was not being respected. Issue corrected. (#4391)
- *Calendar:* Issue corrected re time zones affecting date shown, on the first day of the month. (#4409)
- *API Usage:* Fix for vulnerability (issue #4373) in release 8.6.7 caused some API access issues, which have now been corrected. (#4399)
- *API Usage:* Endpoint added to retrieve module views. (#4387)
- *API Usage:* The API reference library for PHP has been extended with additional example code for more endpoints and options. (#4383)
- *Emails:* Certain characters in sender's address could block reception of an email. Issue corrected. (#4396)
- *Calendar View of Project Tasks:* Single and multi-day tasks had some issues corrected re task display on the calendar in various modes. (#4386)
- *Studio, Related Field Type:* These custom fields have now been enhanced to create a 2-way relationship which shows on the related module's sub-panels. (#4397)

Changes in 8.6.7:

- *Security Vulnerability*: 1CRM received a report of a serious security vulnerability, where uploaded files and system backups were potentially vulnerable via direct web access using guessable URIs. This vulnerability has been addressed, and we recommend all clients whether Cloud Hosted or On Premise to update to release 8.6.7 immediately. We have also added an admin option to encrypt backup files - see more information in the Implementation Guide. (#4373)
- *Security Vulnerability*: 1CRM received a report of an SQL injection vulnerability, which has been addressed. We recommend all clients whether Cloud Hosted or On Premise to update to release 8.6.7 immediately. (#4378)
- *Revenue Forecast*: New feature added, to enable modelling of opportunities as revenue streams. More details in User Guide. (#4374)
- *Calendar Grid Views*: A new feature has been added, allowing users to add all members of selected Teams to a calendar grid view. (#4370)
- *Phpmailer:* This key open source library was updated to version 6.1.6. (#4379)
- *MySQL 8.0.2 Support:* New reserved word *Lead* could cause an issue if a custom field were named Lead. Issue addressed. (#4367)
- *PHP 7.4 Support:* Added with this release, support for the latest version of PHP. (#4363)
- *Exchange Rates on Quotes, Invoices:* Exchange rate on Quotes & Invoices calculated incorrectly if line items added first, then an Account assigned which used a comma (,) as the decimal separator. Issue now corrected. (#4358)
- *Group Tabs*: When creating a new Group Tab (new custom top-level menu group) it could not be renamed. Issue corrected. (#4377)
- *Recurring Meetings:* When editing a single instance of a series of recurring meetings, some unintended fields were being updated to all instances of the meeting. Issue corrected. (#4372)
- *Tracker URLs*: Minor cosmetic issue with Tracker URLs has been corrected. (#4369)
- *Workflow - Send Email Action*: An issue adding Users to a Send Email Action has been resolved.. (#4368)
- *RingCentral for France*: The Maintenance task *Normalize Telephone Numbers* has been extended to support dialling patterns in France. (#4366)
- *Subpanel Control - Number of Items per Page*: An issue with this control has been corrected. (#4364)
- *Merging Duplicates*: When merging duplicate records, multi-select fields were not merged correctly. This issue has been resolved. (#4361)
- *REST API*: An issue with using the REST API to retrieve a list of Projects has been corrected. (#4382)
- *Calendar - Tasks Display:* When two tasks were scheduled at the same time, only one was displayed. Issue corrected. (#4356)

Changes in 8.6.6:

- *Calendar project view*: Filter by user had an issue, now corrected. (#4241)

- *Campaign Wizard*: Added support for creating Opt In Tracking Links via Campaign Wizard. (#4268)
- *PayPal Button on Invoice PDFs*: Enterprise Edition now allows your admin to place a PayPal payment button on your invoice PDFs if desired. (#4322)
- *WooCommerce Integration*: When WooCommerce orders are mapped to 1CRM Invoices, add sync of Payments from WooCommerce to 1CRM. (#4323)
- *Microsoft Teams Integration:* Microsoft Teams added as a supported Online Meeting Service. Automatically create Teams meetings when you schedule meetings in 1CRM, with a tick of a box. (#4324)
- *Zoom Integration:* Zoom added as a supported Online Meeting Service. Automatically create Zoom meetings when you schedule meetings in 1CRM, with a tick of a box. (#4357)
- *Projects List View Filter*: Minor enhancement, now shows only Active projects by default. (#4326)
- *Google Sync*: This sync had a few bug fixes added. (#4332)
- *Database Import*: Issue with importing into ID fields has been resolved.. (#4333)
- *Pipeline by Sales Stage Chart*: An issue with editing date filters has been resolved. (#4335)
- *Workflow*: Issue corrected - empty date operator now being treated as *Any*. (#4341)
- *Forecasts*: An issue has been corrected relating to failure to update displayed values when Quotas were updated. (#4342)
- *Cases:* Error 500 could result when editing a Case - a regression from the bug fix 4282 re Escalate button. Now corrected. (#4344)
- *Activities Sub-panels*: Items had lost their close checkbox - issue corrected. (#4349)
- *Spectrum Theme*: Minor issue with Quote subject being displayed in All Caps has been corrected. (#4354)

Changes in 8.6.5 / 8.6.4:

- *Two-factor Authentication (2FA) feature added*: Compatible with several popular smartphone apps including Microsoft Authenticator, and Google Authenticator.
- *Zapier integration for Accounting*: Full release of this feature, with initial support for Xero and QuickBooks Online. New [1CRM and Zapier Guide](#) available on our site.
- *Lead Forms Captcha Support*: 1CRM Lead Forms generation will now produce a form including a captcha security feature if desired.
- *API Extensions:* Several new API entry points have been added, plus session authentication for API access. See the [Developer Guide](#) for more details. (#4298)
- *Claro theme Enhancement*: The Claro theme now offers the ability to display a user-supplied image in the background, It can be selected by a control in the footer.
- *WooCommerce Sync*: This sync for the Enterprise edition has had several enhancements and bug fixes. (#4312, #4296, #4320)
- *Social Media Links*: Google+ has been removed as an option on the list of available social media links you can add to Leads, Contacts and Accounts. YouTube and Instagram have been added.. (#4304)
- *Call Logging*: The Call Logging pop up had an issue which has been corrected. (#4311)
- *RTF MailMerge*: This function has been enhanced to allow the use of custom fields. (#4313)
- *Converting Sales Order to Shipping Record*: When converting a sales order to a shipping record, non-catalog items could be lost from the shipping record. Issue now corrected. (#4302)
- *Receiving a Purchase Order*: This screen had an issue which could leave a Purchase Order shown as Partially Received when it should be shown as Received in Full. The issue has been corrected. (#4301)
- *Opportunity Funnel Chart*: This chart showed an incorrect sub-title under the chart - issue now corrected. (#4294)
- *Commissions Settings on Admin - Company Info Screen*: An issue editing these settings has been corrected. (#4295)
- *Addressing an Email*: There was an issue with using the Add Receipients pop up dialog which has been corrected. Adding recipients by typing them in with dynamic lookup had no issue. (#4309)

Changes in 8.6.3:

- *MaxMind GeoIP*: This database is used to identify the geographical location of email recipients when opening emails.This service changed their API, and now requires a unique license key for each user accessing their service. So in this version of 1CRM we added a setting to the *Admin - System Settings* screen to allow you to enter your MaxMind license key, which you may obtain free of charge at the MaxMind website. (#4270)
- *TimeSheets Change Log*: The Change Log capability has been added to the TimeSheets module. (#4280)
- *Calls List View*: An issue with timezone adjustment when displaying Call Start Date (not the usual Call Start Date & Time) has been corrected. (#4278)
- *Sales Orders Gross Profit*: An issue with the calculation of Gross Profit on Sales Orders (Invoices and Quotes were unaffected) has been corrected. (#4277)
- *Contact Creation for existing Account*: When creating a new Contact, and an existing Account is selected for that Contact, we now auto-fill the Contact addresses from the Account if they are empty when the Account is selected. (#4276)
- *Mass Update, Teams*: An issue with setting Teams on multiple list view records via the Mass Update panel has been corrected. (#4275)
- *Booked Hours Auto-Approval*: Users can enter Booked Hours using several methods. Not all of these methods correctly respected the auto-approval setting on the *Admin - Company Information* screen, and this issue has now been corrected. (#4231)
- *Sent Emails*: Sent emails often could be missing a closing /body tag, which over time could cause issues with spam ratings for the sender. Issue corrected. (#4272)
- *Dashboard Sales Charts*: An issue with saving settings on Dashboard Sales Charts has been corrected. (#4273)
- *Subpanel Popup, Apply Filter, Select All*: When on a subpanel (such as Contacts subpanel on a Target List) if you clicked on *Add Existing* and got a popup window, then filtered on something such as Account, then did a *Select All*, the returned selection ignored the filter you applied. Issue now corrected. (#4274)

Changes in 8.6.2:

- *Google Sync*: Google has changed its authentication requirements for 3rd party apps. As of Feb 15, 2020, G Suite accounts will only allow access to apps using OAuth 1CRM now supports the Google OAuth authentication method. (#4251)

- *Expense Reports*: An issue in Expense Reports (calculating taxes if Euro currency decimal separator is selected) has been corrected. (#4247)

- *Invoices, Mass Emailing*: Preliminary version of this new feature has been added. Users select one or more Invoices, then select *Email Invoices as PDF* from *Action* button. Invoices are sent to all Accounting Contacts for the Accounts being invoiced.

- *Zapier Phase II*: Preliminary support added for bidirectional sync of Invoices, Accounts etc to various accounting systems via the Zapier service. Tested with QuickBooks Online and XERO to date.

- *Booking Calendar Integration*: Preliminary support added for integration via the 1CRM Customer Connection portal for the WordPress plugin [Booking Calendar]. Includes new fields on Meetings, when the Meetings are created as Booked Appointments in the CRM by clients booking appointments within WordPress websites.

WARNING: System requirements: 1CRM System 8.6 **requires the use of PHP version 7.1**. PHP memory allocation must be a minimum of 200MB.

WARNING: Your server must have Internet access: Your system absolutely requires Internet access or it will stop working.

SYSTEM 8.6 DOCUMENTATION:

1CRM System 8.6 includes the core CRM with integrated CRMFlex Mobile Access. Release 8.6 documentation download links are provided below:

- User Guide
- Mobile User Guide
- Implementation Guide
- QuickStart Checklist
- Developer Guide
- 1CRM Customer Connection for WordPress Portal Guide
- 1CRM Cloud Service Level Agreement
- 1CRM License Agreement
- 1CRM Editions & Pricing Chart, Sales Brochure, QuickStart Services Brochure, Slide Deck

A FEW NOTES OF CAUTION AND ADVICE:

1 - If you wish to upgrade to this release of 1CRM, you must already be using 1CRM 8.0.11 or later already. If you are not, you must first upgrade to at least 8.0.11, following all the instructions in the appropriate release notice.

2 - Any time you upgrade an existing installation, you must first backup both the database and the installation directory, and then set broad write permissions on the installation directory, as the upgrade will need to write to it. We recommend you apply the upgrade to your backup, as that also tests your backup. When you are finished the upgrade, restore more secure permissions. If you have not taken backups, and experience an issue after performing an upgrade, you may cause yourself significant expense in billable services to repair your installation.

3 - Before performing an upgrade, uninstall any language packs you may have installed. After the upgrade, install the new language packs suited for the new version.

4 - For any 1CRM System 8.6 installation make certain that your server has the PHP-XML module loaded (providing the DOM extension used by the PDF print feature). Also make certain that your server has the PHP-GD module loaded. This is required for the graphical Gantt charts feature for Projects. You also need the cURL, MBStrings, SOAP, LDAP and IMAP optional PHP components installed. (See the Implementation Guide for more details.)

5 - Clients with customized software installations containing custom code should not install this patch without the help of the developers responsible for those custom changes.

6 - The upgrade patch is loaded using the Upgrades & Customization option in the Admin area.

7 - Make certain that upload_max_filesize and post_max_size settings in php.ini are both set for a size of at least 20 MB - otherwise the patch and Help file may not upload to your server correctly. Also check your timeout settings. (Again, see the Implementation Guide for more details.