
Client Data System®

Known Issues Guide

Version 4.3



E-Z Data, Inc.

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Introduction

This guide outlines a list of issues that were not resolved with Client Data System® (CDS) v4.3. These issues may have been found after the production cycle for the build, may have been incomplete due to technical considerations, or require more analysis to make them work within the design of the application. For a list of the issues addressed in v4.3, please refer to the *CDS Progress Guide*.

Installation Updates

Upgrade Process

- During the upgrade, the window tracking the progress of the upgrade will frequently go blank.
- There is no overall progress bar during the installation/upgrade process. Instead, the progress of individual processes is tracked in smaller dialog boxes.
- The upgrade process must be run from a system with a CDS workstation. If the install is run on a server with no workstation, the process will think the user wants to perform a fresh install, not an upgrade.

Base System Updates

Calendar Module

- When opening the image log for a client, the user will be prompted to select a program; however, it should open the program automatically.
- Additional periods in the path to a file will cause errors.
- The Mass Activity window only allows pasting of one line of text at a time.
- The F8 key does not work when trying to pull up the Activity Log in a set.
- There is no way to set up an “end” time for an activity spanning several days.
- In the Activity Options under Modify Current User's Profile, if custom choices are added, there is no way to color code them like the system/default choices.

Contact Module

- When updating a Contact's address, the user is not prompted to change a Key Relation's address if the Key Relation does not have an address in his/her own record.
- When in the Sets area of the Contact Summary, the Print Preview displays in Portrait View but prints in Landscape View.
- A second copy of the business address is added to the Contact's address list when the Contact is added to the business as a key relation.

Business Module

- When adding new Business records from the Business Summary, the application will crash when the user attempts to add a second record.
- Mass e-mailing is not available from a Set of Business records unless the user starts from the Business Contact Summary. If the user starts from the Sets area, CDS assumes there is no e-mail address for the business instead of going to the primary contact.
- From the Business Key Relations tab, selecting a record and then selecting **Create Group Census from Key Relations** from the **Record** menu does not add the record to the Group Census tab.

Security

C-tree error messages can occur when a user is mapped to the CDSWIN.svr folder from a workstation. The administrator may need to re-create the Share permissions and Security on the server after running the 4.3 upgrade.

Laser App Integration

If the Launch Laser App option does not display once the license is installed and Laser App is available, user profiles may need to be updated. This issue can be resolved by installing the CDS Outlook Sync Update.

Letters

- If a user is running a label and performs an open search for contact records, the list displays dependant records even if this view is disabled.
- If a record has more than one entry in the E-mail/Web Addresses list and correspondence is run with the EMAIL_EMAIL merge code, the addresses are not included. There is not a merge code to populate all e-mail/Web addresses.
- The option to duplex print with form letters is unavailable because the Printer Options box never displays during the process.
- Labels exported to MS Word lose all formatting.

Filters

When creating a filter on a field that is meant to open all entries that are not equal to a specific option, records with a blank entry in the field do not display in the listing. This can be avoided by adding an "Equals To" 'blank' condition or by performing the filter on the report containing the contacts afterward instead of before creating the report.

Miscellaneous Issues

- The Load function for Contacts does not consistently load all Contact data when performed through CDS. To complete a Load, use the ezLoad.exe file from the CDSWIN folder.
- The Delete button is missing from the Set Members List. Select **Delete** from the **Record** menu to delete a Contact from a Set.
- Rebuild errors may occur with some systems. Update to the CDS Outlook Sync Update to resolve these issues.
- Faxman will be updated or replaced in v6.0.

Module Updates

Commission Tracking Module

- When a negative number is entered in the Times Premium field, a warning message displays. The warning should reflect the correct values that can be entered (2 - 999).
- The Excess Points field does not display a warning message concerning the value that is entered and will accept a negative value. If a negative value is entered, a commission record is not created for premiums in Excess of the Target Premium. A warning message should display that limits users to entering values from .001 to 999.999.
- The Agent/Producer Commissions tab has intermittent refresh issues.

E-mail Interfaces

The five function buttons (Print, Reply, Reply All, Forward, Close) that should display in an opened SmartPad entry for a posted e-mail do not display with an 800x600 resolution.

Group Policy

- The Initial Rate field is inaccessible when first entering a record. It can be accessed once the record is saved. This issue is resolved with the Outlook Sync Update.
- Adding a Class while adding a Policy causes the application to close. This issue is resolved with the Outlook Sync Update.

Policy Module

- When entering a value for a split agent, a message opens when the total value exceeds 100. The message does not always open when the totals exceed 100. When the message opens and the OK button is selected, the value that was entered in the Percentage% field that causes the total Percentage% value to exceed 100, doubles.
- Stop Loss under Policies > Medical > Benefits cannot accommodate 8 digits to allow for multi-million dollar Stop Losses.

Import/Export/Dump/Load

- When attempting to dump one contact record, the window to select the dump location opens and the path is editable. When the window opens to rename the file, it cannot be renamed from "ezdump.xml" and does not create an .xml file where designated or in the default location.
- When exporting from the SmartPad table (Database > Utilities > Import/Export), only the ASCII format allows the Notes portion to come into the file. It cannot be performed with the CSV format.
- Some users experience difficulty using the EZLoad functionality in the application. The EZLoad.exe file can be used externally if this tool does not work within CDS.

Transaction Download Module

In the Buy/Sell report, by program design, the first column cannot be sorted using the A-Z button.