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**Chapter 1: CRM Client v2.4.0**

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If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central, as are the Support Guide and Escalation Guide. The product documentation, other product-related information, and setup files are also available on Support Central.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

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CRM Client v2.4.0

Aurea CRM Client application is part of the Aurea CRM suite of products from Aurea.

CRM Client is a cross platform application that works in both online and offline mode. It runs on Windows 10 (Desktop, Tablet, and Mobile devices) and Apple devices running iOS versions 9 to 11 (iPad and iPhone).

CRM Client allows you to access, display and edit data stored in Aurea CRM. It supports all available verticals and all industry solutions. You can install CRM Client from Apple App Store and Microsoft Store.

Customer Relationship Management (CRM) is a strategic decision by your enterprise to tailor your business processes to meet the needs of your clients. Aurea CRM is a comprehensive and flexible CRM software solution. It is optimally suited to your enterprise if you require short project durations, sector-specific business processes, and a modern system architecture paired with tried and tested functionality.

Our business solutions cater to the demands of businesses of all sizes, providing services to both small departments and multinational corporations. All marketing, sales and service processes are depicted in the system, helping you provide your clients with a comprehensive CRM experience—from the initial contact with a client to offering optimal support and targeted services.

For more information on CRM Client, see the product documentation in Aurea Support Central. When you plan for an installation or upgrade of CRM Client, refer to the system requirements.

For any upgrade or purchase enquiries, please consult your account executive.
What is Supported

The following major functionalities are part of this release:

- Server Registration
- Multi-server Management
- Online and Offline Login
- Offline Dataset Support
- Timeout Handling
- Synchronization
- Viewing System Information
- Logging and Log Views
- Conflict Handling
- Start Page
- Orientation Support
- Login Insight Board
- Buttons
- Toaster Error Messages
- Global Search
- Infoarea search/Recordlist View
- Search Filters
- Viewing Records
- Tabs/Related Records
- Panels and Grid View
- Edit View
- New View (Creating Records)
- Organizer Actions
- Access Rights
- Record Selector
- Mandatory Fields
What is not Supported

The following features are not supported in this release and are planned for future releases.

Note: The non-supported features of CRM Client listed here are primarily from the features supported on CRM.Pad.

- Single sign-on
- Password Change
- MiniDetails
- Links
- Breadcrumb
- Maps
- Vicinity Search
- Selecting Reps
- Documents and Images
- File management (Upload, Download, and Document Inbox)
- Participants
- History and Favourites
- Calendar
- Contact Times
- Date Picker in the Dashboard
- Quick Add
- QR Codes
- Circle of Influence or Relationship
- Interests/Characteristics
- Questionnaires
- CRM.Intelligence
- Analysis
- Query
- Server Triggers and Workflows
- Web View
- Filters (Template, Rights, Update, and Triggers)
- Grouping of Search Results
• SQLite Debugging
• SpotLight Search on iOS Devices
• MobileIron
• Exporting and Sharing Search Results in PDF format

Aurea CRM Client Modules

<table>
<thead>
<tr>
<th>Module</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Client iOS</td>
<td>2.4.0.543</td>
</tr>
<tr>
<td>CRM Client UWP</td>
<td>2.4.4339.0</td>
</tr>
</tbody>
</table>

What is Fixed: Defects

The following table lists the defects fixed in Aurea CRM.Client:

<table>
<thead>
<tr>
<th>Issue #</th>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRMCLIENT-6096</td>
<td>iOS, UWP</td>
<td>Company Field Group disappears when editing a Person in Company record in offline mode.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Issue type:</strong> Defect</td>
</tr>
<tr>
<td>CRMCLIENT-6143</td>
<td>iOS, UWP</td>
<td>Person Field Group disappears when editing a Person in Company record in offline mode.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Issue type:</strong> Defect</td>
</tr>
<tr>
<td>CRMCLIENT-6148</td>
<td>iOS, UWP</td>
<td>Empty field is displaying default value 0.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Issue type:</strong> Defect</td>
</tr>
<tr>
<td>CRMCLIENT-5921</td>
<td>iOS, UWP</td>
<td>Entered Date Activity is displaying 1/1/1900 after selecting a new date.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Issue type:</strong> Defect</td>
</tr>
<tr>
<td>CRMCLIENT-5974</td>
<td>iOS, UWP</td>
<td>Activity not created under Role record.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Issue type:</strong> Defect</td>
</tr>
</tbody>
</table>

Known Issues

There are no known issues in CRM.Client in this release.