

## Collaborati Spend Management

### 6.2.5 Patch 3

#### Release Notes

**Collaborati Spend Management® 6.2.5 Patch 3 (PCSM6250003) resolves the following issue:**

**Issue:** CSM Sync > Timekeeper synchronization and Rate Sharing performance issues.

**Tracking Code:** SUPPORTPRI-67273

**Case Number:** 2023-0316-7714411

**Reported Version:** CSM 6.2.5 Patch 2

#### Workaround

None

#### Pre-Requisites

User TCE Version - 6.2.1

CSM Version - 6.2.5 Patch 2

#### Steps to Reproduce

Below are the following three issues:

1. Updated the code by adding a custom field in CSM Settings > Synchronization Settings so that the Timekeeper Rate sharing can be parameterized.
2. Fixed an issue where a timekeeper (TK) was being removed and recreated when CSM auto created TKs for multiple offices but the same firm. Also added a new custom field in the TYC\$ object as part of the fix.
3. Improved performances related to TK sync.

#### Expected Results of Steps

CSM sync performance issues.

#### Actual Results of Steps

Fixed the 3 issues as described.

#### Root Cause Analysis

None.

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**Issue:** CSM > Sync breaks if the Timekeeper currency originating from Collaborati does not exist in TeamConnect and if auto authorization of Timekeepers is enabled.

**Tracking Code:** SUPPORTPRI-67017

**Case Number:** 2022-1208-6544072

**Reported Version:** CSM 6.2.5

## Workaround

None

## Pre-Requisites

- An active connection must exist between CSM and Collaborati.
- A vendor must be fully authorized and ready to submit invoices. Make sure the default currency for this vendor is USD in Collaborati for testing purposes.

## Steps to Reproduce

1. Make sure the following checkbox is set to Yes in CSM Settings > General > Timekeeper Settings.
  - a. Automatically authorize Collaborati timekeepers and create new contact records with Collaborati timekeeper information.
2. CSM sync must be stopped.
3. Log in as the Vendor in Collaborati.
4. Navigate to Admin > Offices > Office Settings.
5. Change the Billing Currency to U.S. Dollar (Next Day) and Save.
6. Create a new Timekeeper record and associate it with the client account.
7. The currency tied to this Timekeeper record is now the U.S. Dollar (Next Day).
8. Navigate back and change the Billing Currency back to the U.S. Dollar and Save.
9. Start the CSM sync.
10. CSM breaks and an error is displayed.

## Expected Results of Steps

There must be better handling of Timekeeper records if the currency submitted by the vendor does not exist in the Multi-currency lookup table in TeamConnect.

## Actual Results of Steps

CSM sync breaks.

## Root Cause Analysis

CSM Sync is breaking because of an uncaught exception while setting the currency of a timekeeper contact.

Modified code to catch the exception and move forward with the sync process..

***This fix will be merged into the CSM 7.1 Update.***

## INSTALLATION

The following list is a summary of the procedures necessary to install this patch.

1. Log into TeamConnect® as an administrator.
2. Click the Admin tab.
3. Click Admin Settings under the tab bar if it is not already selected.
4. In the left pane, click the About link.
5. In the Available Updates section, follow the instructions below to install the patch.

- a. Click on the Show updates available for installed products button.
  - b. Locate CSM 6.2.5 Patch 3.
  - c. Click Install Now and follow the installation instructions.
6. After successfully installing this patch, stop and start your TeamConnect® instance

## UPGRADE CONSIDERATION

No significant upgrade considerations for this patch.

## LEVEL OF RISK TO UPDATE WITH PATCH

**LOW**