

# **AvePoint Timeline for Microsoft Dynamics® CRM**

**Release Notes**

# Table of Contents

- What’s New in This Document..... 4
- AvePoint Timeline Pro..... 5
  - AvePoint Timeline Pro 2.0.1..... 5
  - AvePoint Timeline Pro 2.0..... 6
  - AvePoint Timeline Pro 1.0.2..... 7
  - AvePoint Timeline Enterprise 1.0.1 ..... 8
  - AvePoint Timeline Enterprise 1.0 ..... 9
- AvePoint Timeline for Windows 8.1 ..... 10
  - AvePoint Timeline 2.0.1 for Windows 8.1 ..... 10
  - AvePoint Timeline 2.0 for Windows 8.1 ..... 11
  - AvePoint Timeline 1.2.1 for Windows 8.1 ..... 12
  - AvePoint Timeline 1.2 for Windows 8.1 ..... 13
- AvePoint Timeline for Windows 8 ..... 14
  - AvePoint Timeline 1.2 for Windows 8 ..... 14
  - AvePoint Timeline 1.1.3 for Windows 8 ..... 15
  - AvePoint Timeline 1.1.2 for Windows 8 ..... 16
- AvePoint Timeline for Windows 7 ..... 17
  - AvePoint Timeline 1.0.1 for Windows 7 ..... 17
- AvePoint Timeline for iPad and iPhone ..... 18
  - AvePoint Timeline 2.0.1 for iPad and iPhone ..... 18
  - AvePoint Timeline 2.0 for iPad and iPhone ..... 19
  - AvePoint Timeline 1.1.2 for iPad and iPhone ..... 20
  - AvePoint Timeline 1.1.1 for iPad and iPhone ..... 21
  - AvePoint Timeline 1.1 for iPad and iPhone ..... 22
- AvePoint Timeline for Android ..... 23
  - AvePoint Timeline 2.0 for Android..... 23
  - AvePoint Timeline 1.1.2 for Android..... 24
  - AvePoint Timeline 1.1.1 for Android..... 25
  - AvePoint Timeline 1.1.0 for Android..... 26

AvePoint Timeline 1.0.2 for Android..... 27  
AvePoint Timeline 1.0.0 for Android..... 28  
Notices and Copyright Information ..... 29

## What's New in This Document

Date	Changes
10/27/2014	Added known issue for Timeline 2.0.1 for Windows 8.1 and Timeline Pro 2.0.1
8/19/2014	Updated for release of Timeline 2.0 for iOS.
12/19/2014	Updated for release of Timeline 2.0.1 for iPhone and iPad

# AvePoint Timeline Pro

## AvePoint Timeline Pro 2.0.1

Release Date: May 25, 2014

### Supported Operating Systems and Dynamics Versions

AvePoint Timeline Pro 2.0.1 supports Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

### New Features and Improvements

- Added Japanese language support.

### Known Issues

- Google Chrome Version 37 and later versions are not supported on Timeline Pro.
- AvePoint Timeline Enterprise does not fully support navigating to the Dynamics environment from a Microsoft Outlook client.
- The **Star** and **Open in Timeline** functionalities may not function until you click **Other Settings** on the ribbon.

# AvePoint Timeline Pro 2.0

Release Date: April 15, 2014

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline Pro 2.0 supports Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features and Improvements

- Added **My Managed Users** to the **Users View** area for the **Users** entity and the **My Activities**, **My Open Activities**, and **My Open Tasks** to the **Activities View** area for the **Activities** entity in AvePoint Timeline Profiles.
- Added the **Management** role to AvePoint Timeline Profiles. It works the same as other roles in AvePoint Timeline Profiles.
- AvePoint Timeline Enterprise is now fully supported on the following browsers: Safari, Google Chrome, or Mozilla Firefox.

## Known Issues

- AvePoint Timeline Enterprise does not fully support navigating to the Dynamics environment from a Microsoft Outlook client.
- The **Star** and **Open in Timeline** functionalities may not function until you click **Other Settings** on the ribbon.

# AvePoint Timeline Pro 1.0.2

Release Date: November 19, 2013

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline Pro 1.0.2 supports Windows 7, Windows 8, iOS, and Android operating systems, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- AvePoint Timeline Enterprise 1.0.2 now supports Microsoft Dynamics CRM 2013 Online and On-Premises.

## Known Issues

- AvePoint Timeline Enterprise is not fully supported on the following browsers: Safari, Google Chrome, or Mozilla Firefox.
- AvePoint Timeline Enterprise does not fully support navigating to the Dynamics environment from a Microsoft Outlook client.
- The **Star** and **Open in Timeline** functionalities may not function until you click **Other Settings** on the ribbon.

# AvePoint Timeline Enterprise 1.0.1

Release Date: October 15, 2013

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline Enterprise 1.0.1 supports Windows 7 and Windows 8 operating systems, as well as Microsoft Dynamics CRM 2011 Online and On-Premises.

## Improvements

- In the **Activity Details** page for profile configuration, adding the **Description** field to the **Overview** section no longer automatically adds it to the **Detailed Body** section as well.
- Removed Star configuration from the AvePoint Timeline Profiles.

## Known Issues

- Adding the Notes activity to an AvePoint Timeline Profile is currently not supported.
- When editing the AvePoint Timeline Profile, an error occurs while opening the **Cases Resolved By Me in the Last 7 Days** and the **Cases Resolved in the Last 7 Days** views.



# AvePoint Timeline Enterprise 1.0

Release Date: September 10, 2013

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline Enterprise 1.0 supports Windows 7 and Windows 8 operating systems, as well as Microsoft Dynamics CRM 2011 Online and On-Premises.

## Known Issues

- Adding the Notes activity to an AvePoint Timeline Profile is currently not supported.
- When editing the AvePoint Timeline Profile, an error occurs while opening the **Cases Resolved By Me in the Last 7 Days** and the **Cases Resolved in the Last 7 Days** views.

# AvePoint Timeline for Windows 8.1

## AvePoint Timeline 2.0.1 for Windows 8.1

Release Date: May 25, 2014

### Supported Operating Systems and Dynamics Versions

AvePoint Timeline 2.0.1 for Windows 8.1 supports the Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8](#).

### New Features and Improvements

- Added Japanese language support.

### Known Issues

- Google Chrome Version 37 and later versions are not supported on Timeline for Windows 8.1.
- Performance issues may occur when loading a record with over 600 activities using a Windows RT device.
- If the **Claims-Based Authentication Root Certificate** in the Microsoft Dynamics CRM server is not imported to the **Trusted Root Certification Authorities** folder in the server where AvePoint Timeline resides, AvePoint Timeline will not connect to Microsoft Dynamics CRM using Claims-Based Authentication. An error message appears stating that the certificate is invalid.

# AvePoint Timeline 2.0 for Windows 8.1

Release Date: April 15, 2014

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline 2.0 for Windows 8.1 supports the Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8](#).

## New Features and Improvements

- Added support for selecting a **Status Reason** when you close an activity in Timeline, which is the same functionality as Dynamics.
- Added the **My Activities** and **My Open Activities** views to Timeline for task management.
- Added a News Ticker to the bottom of the lite version of the app. The app will populate the ticker with news via RSS or Twitter to advertise other AvePoint products. Once a Pro profile has been detected, the news ticker can be dismissed.

## Known Issues

- Performance issues may occur when loading a record with over 600 activities using a Windows RT device.
- If the **Claims-Based Authentication Root Certificate** in the Microsoft Dynamics CRM server is not imported to the **Trusted Root Certification Authorities** folder in the server where AvePoint Timeline resides, AvePoint Timeline will not connect to Microsoft Dynamics CRM using Claims-Based Authentication. An error message appears stating that the certificate is invalid.

# AvePoint Timeline 1.2.1 for Windows 8.1

Release Date: January 7, 2014

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.2.1 for Windows 8.1 supports the Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8](#).

## New Features and Improvements

- All Timeline functionality can now be used with Demo data.

## Known Issues

- Performance issues may occur when loading a record with over 600 activities using a Windows RT device.
- If the **Claims-Based Authentication Root Certificate** in the Microsoft Dynamics CRM server is not imported to the **Trusted Root Certification Authorities** folder in the server where AvePoint Timeline resides, AvePoint Timeline will not connect to Microsoft Dynamics CRM using Claims-Based Authentication. An error message appears stating that the certificate is invalid.

# AvePoint Timeline 1.2 for Windows 8.1

Release Date: November 20, 2013

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.2 for Windows 8.1 supports the Windows 8.1 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8](#).

## New Features

- AvePoint Timeline 1.2 for Windows 8.1 now supports Microsoft Dynamics CRM 2013 Online and On-Premises.

# AvePoint Timeline for Windows 8

## AvePoint Timeline 1.2 for Windows 8

Release Date: April 24, 2014

### Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.2 for Windows 8 supports the Windows 8 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8.1 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8.1](#).

### New Features and Improvements

- Sorting the data by Year, Month, Week, or Day, now displays correctly.

### Known Issues

- If adding activities for a Lead and qualifying the **Lead** to an **Opportunity**, the activities added before you qualified the lead can be loaded into Dynamics but not Timeline. The same issue occurs when you qualify a **Contact** to an **Account**.
- If a **Subject** or **Description** of an activity contains the character <, the characters after the < will disappear both in the **Details** and **Overview** interfaces of Timeline.
- There are performance issues when loading a record with over 600 activities using a Windows RT device.
- Timeline may dial a phone number incorrectly if both the Business and Mobile Phone number fields are used.
- If the Claims-Based Authentication Root Certificate from the Microsoft Dynamics CRM server is not imported to the **Trusted Root Certification Authorities** folder on AvePoint Timeline computer, a login failure will occur.

**Workaround:** Export the Claims-Based Authentication Root Certificate from the Microsoft Dynamics CRM server and then import it to the **Trusted Root Certification Authorities** folder in the computer where AvePoint Timeline resides.

# AvePoint Timeline 1.1.3 for Windows 8

Release Date: January 31, 2014

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.1.3 for Windows 8 supports the Windows 8 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8.1 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8.1](#).

## New Features and Improvements

- All Timeline functionality can be used with the Timeline Demo data.
- Improved the Login page design to be more user friendly.
- Added the **Share via email** functionality in a record's Timeline View.

## Known Issues

- Timeline may dial a phone number incorrectly if both the Business and Mobile Phone number fields are used.
- If the Claims-Based Authentication Root Certificate from the Microsoft Dynamics CRM server is not imported to the **Trusted Root Certification Authorities** folder on AvePoint Timeline computer, a login failure will occur.

**Workaround:** Export the Claims-Based Authentication Root Certificate from the Microsoft Dynamics CRM server and then import it to the **Trusted Root Certification Authorities** folder in the computer where AvePoint Timeline resides.

# AvePoint Timeline 1.1.2 for Windows 8

Release Date: November 15, 2013

## Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.1.2 for Windows 8 supports the Windows 8 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

**\*Note:** The Windows 8.1 operating system requires a different version of AvePoint Timeline. See [AvePoint Timeline for Windows 8.1](#).

## New Features

- AvePoint Timeline 1.1.2 for Windows 8 now supports Microsoft Dynamics CRM 2013 Online and On-Premises.



# AvePoint Timeline for Windows 7

## AvePoint Timeline 1.0.1 for Windows 7

Release Date: November 19, 2013

### Supported Operating Systems and Dynamics Versions

AvePoint Timeline 1.0.1 for Windows 7 supports the Windows 7 operating system, as well as Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

### New Features

- AvePoint Timeline 1.0.1 for Windows 7 now supports Microsoft Dynamics CRM 2013 Online and On-Premises.

### Known Issues

- **My Connections** and **Active Connections** views may not display properly for Timeline profiles created in Dynamics.
- The Case entity's **Cases Resolved By Me in the last 7 days** and the **Cases Resolved in the last 7 days** views may not display properly.
- The number calculated by the **Calendar** functionality does not include the number of Notes.
- Custom fields can only be retrieved by Timeline Enterprise version.

# **AvePoint Timeline for iPad and iPhone**

## **AvePoint Timeline 2.0.1 for iPad and iPhone**

Release Date: December 23, 2014

### **New Features**

- Now supports iOS 8.

# AvePoint Timeline 2.0 for iPad and iPhone

Release Date: July 17, 2014

## Supported Dynamics Versions

AvePoint Timeline 2.0 for iPad and iPhone supports Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- Added Japanese language support.
- After accessing the Calendar view, the number of activities for each day will be listed.

## Bug Fixes

- On the iPhone, an issue may occur where the Timeline app cannot load more data after accessing the entity list view, and there are special characters in the entity names.
- On the iPad, display issues may occur if there are over 200 records, some with special characters.

## Known Issues

- An entity record that has 2,000 - 3,000 activities in a quarter may cause display issues when scrolling.

# AvePoint Timeline 1.1.2 for iPad and iPhone

Release Date: February 15, 2014

## Supported Dynamics Versions

AvePoint Timeline 1.1.2 for iPad and iPhone supports Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- Added the **License Agreement** and **Learn More** fields to Timeline's **About** interface.

## Known Issues

- On the iPhone, an issue may occur where the Timeline app cannot load more data after accessing the entity list view, and there are special characters in the entity names.
- On the iPad, display issues may occur if there are over 200 records, some with special characters.

# AvePoint Timeline 1.1.1 for iPad and iPhone

Release Date: December 10, 2013

## Supported Dynamics Versions

AvePoint Timeline 1.1.1 for iPad and iPhone supports Microsoft Dynamics CRM 2013 Online and On-Premises and Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- Added support for Microsoft Dynamics CRM 2013 Online and On-Premises.

## Known Issues

- On the iPhone, an issue may occur where the Timeline app cannot load more data after accessing the entity list view, and there are special characters in the entity names.
- On the iPad, display issues may occur if there are over 200 records, some with special characters.

# **AvePoint Timeline 1.1 for iPad and iPhone**

Release Date: November 25, 2013

## **Supported Dynamics Versions**

AvePoint Timeline 1.1 for iPad and iPhone supports Microsoft Dynamics 2011 Online and On-Premises.

## **New Features**

- AvePoint Timeline 1.1 for iPad and iPhone supports Microsoft Dynamics CRM 2011 Online and On-Premises.

# AvePoint Timeline for Android

## AvePoint Timeline 2.0 for Android

Release Date: September 2, 2014

### New Features and Improvements

- Supports Japanese language.

### Known Issues

- Loading more than 1,000 activities within a three month period may take some time.

# AvePoint Timeline 1.1.2 for Android

Release Date: February 19, 2014

## Supported Dynamics Versions

AvePoint Timeline 1.1.2 for Android supports Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features and Improvements

- Updated copyright information.

## Known Issues

- An activity **Due Date** that is modified in Dynamics may not synchronize properly to Timeline.
- The **Other Activities** filter option may not filter accounts accurately after data synchronization.



# AvePoint Timeline 1.1.1 for Android

Release Date: February 18, 2014

## Supported Dynamics Versions

AvePoint Timeline 1.1.1 for Android supports Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features and Improvements

- Improved the Timeline experience by adding Demo data, which can be used with all Timeline functionality.
- Added the **Share** function to Timeline for sharing Timeline with others using e-mails.
- Added the **Rate Timeline** and **Share** functions to the Timeline **About** interface.

## Known Issues

- An activity **Due Date** that is modified in Dynamics may not synchronize properly to Timeline.
- The **Other Activities** filter option may not filter accounts accurately after data synchronization.

# AvePoint Timeline 1.1.0 for Android

Release Date: January 7, 2014

## Supported Dynamics Versions

AvePoint Timeline 1.1.0 for Android supports Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- Added support for Timeline Pro.
- Milestones dates can be added to a timeline via Timeline Pro.
- Notes can be displayed as an activity on the Timeline View.
- Starred records now synchronize with Dynamics CRM with Timeline Pro.
- When switching from offline to online mode, all modifications will synchronize with Dynamics CRM.
- The Search box has been added to all entity types.

## Bug Fixes

- The act of deleting a record activity or entity synchronizes properly with Timeline.
- Timeline no longer gets stuck on the loading page if the first record and the last record on a page are created simultaneously.

# AvePoint Timeline 1.0.2 for Android

Release Date: July 3, 2013

## Supported Dynamics Versions

AvePoint Timeline 1.0.2 for Android supports Microsoft Dynamics CRM 2011 Online and On-Premises.

## New Features

- Added support to connect to Microsoft Dynamics CRM using Claims-Based Authentication or Internet-Facing Deployment.

## Known Issues

- The act of deleting a record activity or entity may not synchronize properly with Timeline.
- When loading activity records, Timeline will may get stuck on the loading page if the first record and the last record on a page are created simultaneously.

# **AvePoint Timeline 1.0.0 for Android**

Release Date: July 2, 2013

## **Supported Dynamics Versions**

AvePoint Timeline 1.0.0 for Android supports Microsoft Dynamics CRM 2011 Online and On-Premises.

## **Known Issues**

- The act of deleting a record activity or entity may not synchronize properly with Timeline.
- When loading activity records, Timeline will may get stuck on the loading page if the first record and the last record on a page are created simultaneously.

# Notices and Copyright Information

## Notice

The materials contained in this publication are owned or provided by AvePoint, Inc. and are the property of AvePoint or its licensors, and are protected by copyright, trademark and other intellectual property laws. No trademark or copyright notice in this publication may be removed or altered in any way.

## Copyright

Copyright ©2014 AvePoint, Inc. All rights reserved. All materials contained in this publication are protected by United States and international copyright laws and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of AvePoint, 3 Second Street, Jersey City, NJ 07311, USA or, in the case of materials in this publication owned by third parties, without such third party's consent. Notwithstanding the foregoing, to the extent any AvePoint material in this publication is reproduced or modified in any way (including derivative works and transformative works), by you or on your behalf, then such reproduced or modified materials shall be automatically assigned to AvePoint without any further act and you agree on behalf of yourself and your successors, assigns, heirs, beneficiaries, and executors, to promptly do all things and sign all documents to confirm the transfer of such reproduced or modified materials to AvePoint.

## Trademarks

AvePoint<sup>®</sup>, DocAve<sup>®</sup>, the AvePoint logo, and the AvePoint Pyramid logo are registered trademarks of AvePoint, Inc. with the United States Patent and Trademark Office. These registered trademarks, along with all other trademarks of AvePoint used in this publication are the exclusive property of AvePoint and may not be used without prior written consent.

Microsoft, MS-DOS, Internet Explorer, Office, Office 365, SharePoint, Windows PowerShell, SQL Server, Outlook, Windows Server, Active Directory, and Dynamics CRM 2013 are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe Acrobat and Acrobat Reader are trademarks of Adobe Systems, Inc.

All other trademarks contained in this publication are the property of their respective owners and may not be used without such party's consent.

## Changes

The material in this publication is for information purposes only and is subject to change without notice. While reasonable efforts have been made in the preparation of this publication to ensure its accuracy, AvePoint makes no representation or warranty, expressed or implied, as to its completeness, accuracy, or suitability, and assumes no liability resulting from errors or omissions in this publication or from the use of the information contained herein. AvePoint reserves the right to make changes in the Graphical User Interface of the AvePoint software without reservation and without notification to its users.

AvePoint, Inc.  
Harborside Financial Center, Plaza 10  
3 Second Street, 9th Floor  
Jersey City, New Jersey 07311  
USA