

Applying Service Pack 2 for Sage SalesLogix Version 7.2

Version 7.2.2

Developed by Sage SalesLogix Technical Publications



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Applying Service Pack 2 for Sage SalesLogix Version 7.2

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Contents

Introduction	1
Requirements	1
About This Document	1
Chapter 1 Upgrade Workplan	3
Prepare to Upgrade	3
Protect Your Network Customizations	5
Prepare Your Sage SalesLogix Database	5
Upgrade your Main Office	7
Install the Service Pack Bundle	8
Add Oracle Schema (if applicable)	9
Upgrade your Network Customizations	9
Upgrade Synchronization	9
Upgrade Sage SalesLogix Network Users	10
Upgrade Sage SalesLogix Remote Users/Offices	10
Upgrade Web Components (if applicable)	10
Protect Your Web Customizations	11
Install Web Bundles	13
Build and Deploy your Web Portals	17
Perform Post-Upgrade Tasks	18
Chapter 2 Changes in this Release	23
Finding Script Changes	23
New Tables	23
New Visual Basic Scripts	24
Changes to Existing Forms	24
Updated Global Scripts	27
Updated Visual Basic Scripts	27
Changes to Existing Reports	27
Changes to Existing Groups	28

Introduction

This document provides instructions for upgrading the Sage SalesLogix Network and Web components to Sage SalesLogix version 7.2 Service Pack 2. See Tasks 4 and 5 in Chapter 1, "Upgrade Workplan" for detailed changes in this release.

Requirements

Before upgrading to version 7.2.2, you must:

- Ensure your current Sage SalesLogix version is 7.2 or later.
- Create a database backup. Even if you back up every night, do another backup before this installation to preserve any last-minute changes. Then, verify that your backup completed successfully and that you can restore from it, if necessary.

About This Document

[Chapter 2, "Changes in this Release"](#) outlines the plugin changes from Sage SalesLogix v7.2 to Service Pack 2. Use the Upgrade Workplan included in this document to guide your upgrade process.

If you have not upgraded to Sage SalesLogix v7.2, refer to the following documents on the SupportOnline/Sage Online Support and Services Web site (<http://support.saleslogix.com>) to upgrade.

- *Upgrading Sage SalesLogix from Version 5.2.x to 7.2*
- *Upgrading Sage SalesLogix from Version 6.0.x or 6.1.x to 7.2*
- *Upgrading Sage SalesLogix from Version 6.2.x to 7.2*
- *Upgrading Sage SalesLogix from Version 7.0.x to 7.2*
- *Upgrading Sage SalesLogix Web from v5.2.x to 7.2.pdf*
- *Upgrading Sage SalesLogix Web from v6.0.x thru v6.2.2 to 7.2*
- *Upgrading Sage SalesLogix Web from v6.2.3 thru v6.2.6 to 7.2*
- *Upgrading Sage SalesLogix Web from v7.x to 7.2*

After upgrading, see the "What's New in this Release" topic in the online Help systems for an explanation of the new features.

Chapter 1

Upgrade Workplan

Use this workplan to upgrade to Sage SalesLogix v7.2 Service Pack 2. Follow the tasks in order. If a task does not apply, disregard it and move on to the next.

✓	Task Description	Notes
Prepare to Upgrade		
1	Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.	
2	Install v7.2.2 in a test environment before installing on your production database. Note Refer to SupportOnline\Sage Software Online Support and Services Knowledge Base. Search for "creating a test environment" for information on using a copy of your production database in a test environment.	
3	Understand the Service Pack bundle extraction process.	
<p>Task 3 Details</p> <p>Depending on the installation method you choose, service pack files and bundles may not be extracted to your local computer.</p> <ul style="list-style-type: none"> • If you install the service pack from a temporary folder without extracting all the contents to your local computer, the bundles remain in the EXE file within the service pack .zip file and you must extract the bundles from the EXE when you are ready to install them. • If you choose to extract the files and then install the service pack from your local computer, the bundles are included in the extraction process and can be found on your local computer when you are ready to install them. <p>Ensure you select the appropriate installation method when completing Task 18.</p>		

✓	Task Description	Notes
	4 Understand the changes in this release.	
	<p>Task 4 Details</p> <p>In addition to defect fixes, v7.2.2 contains the following new functionality:</p> <ul style="list-style-type: none"> • Web Client enhancements. Enhancements include: <ul style="list-style-type: none"> • Leads functionality, formerly released as a bundle, has been incorporated into the Web Client. • Marketing campaigns are available in the Web Client. • Automatic rollover of timeless activities. When the Auto rollover to next day option is selected, open (uncompleted) activities automatically have their start date reset to the next day. As a result, these activities do not display in the Activity Reminder dialog box. This feature is also available in the Sage SalesLogix Network Client. • A landing page that displays when a user first logs on to the Web Client. The page displays information that assists the user in navigating within the Web Client and to resources outside Sage SalesLogix. • UI improvements such as enhanced drag-and-drop tabs, improved buttons and right-click menus, and updates to lookups, list views and products. • Simplified upgrade process for customized environments. If you have customized any of the Web components, the bundle installation wizard includes new functionality for merging your customizations with the Sage SalesLogix changes. • Application Architect enhancements. Enhancements include: <ul style="list-style-type: none"> • New Container control. The Container control, used for quick forms, is similar to the Panel control used in the Architect. • New DialogResult property. This property can be used when defining an action to run on a Cancel or OK button click. • New Dynamic URL control. • Ability to bind lists of data to the list in a ComboBox or RadioGroup control. • Code Snippets for VB.Net. • Build Log windows that can be filtered by Errors, Messages, and Warnings. • Forms render in Application Architect as they will appear in the Web Client. 	

✓	Task Description	Notes
	<p>5 Understand the changes in version 7.2 Service Pack 1. Note Version 7.2.2 is a cumulative release which includes all changes released in service pack 1.</p> <p>Task 5 Details</p> <p>In addition to defect fixes, v7.2.1 contains the following new functionality:</p> <ul style="list-style-type: none"> • Windows authentication for the Web Client. Web users can automatically log on to the Web Client using their Microsoft Windows logon credentials. • Web Client usability enhancements. The Web Client user experience has been enhanced to include updates to the Menu bar (and drop-down menu behavior) and new right-click menus. • Web Client performance improvements. Improvements include a new pre-compile that is created under the target virtual directory when a Web site is deployed. This pre-compile reduces the start-up time for the first use of the Web. • Application Architect enhancements. Enhancements include: <ul style="list-style-type: none"> • Portal Page Wizard. The new portal page wizard simplifies the process of creating entity pages. • Entity schema. When creating an entity, the associated schema is automatically created. If you drag and drop an entity into a bundle, the schema is also included. • Quick forms wizards. New quick forms wizards improve the developer experience when working in the Application Architect. • Bundle installation check for duplicates. When installing a Web bundle, Application Architect displays a list of duplicate items that exist in the bundle and the target project. 	
Protect Your Network Customizations		
	<p>6 (Optional) Record your Network customizations and use the Architect to create a bundle of all customized plugins in your database. See the “Working with Bundles” topic in the Architect Help for instructions. Note Sage SalesLogix does not overwrite your customized plugins with the v7.2.2 plugins. However, this bundle can be used as a backup of your customizations.</p>	
	<p>7 Review the v7.2.2 plugin changes to determine if you have customized any plugins that are updated in this release.</p> <p>Task 7 Details</p> <p>Plugin changes, detailed in Chapter 2, “Changes in this Release”, are listed by type (form, script, and so on) and then alphabetically by plugin name within the type. The service pack bundle includes all plugin changes.</p>	
	<p>8 After reviewing plugin changes, determine if you are going to add your customizations to the v7.2.2 plugins (recommended) or add the Sage SalesLogix changes to your custom plugins. Note Some of the views and scripts in the bundle have had localization functions applied to them, but are otherwise unchanged. If you have customized these plugins, and you do not plan to localize Sage SalesLogix in the future, you can choose not to retrofit your existing plugins with the localization changes.</p>	
Prepare Your Sage SalesLogix Database		
	<p>9 If you are using Microsoft SQL Server and have published your database for replication, remove replication. Remember to reset replication after your upgrade is complete.</p>	

✓	Task Description	Notes
	10 Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in the Administrator. Note See the "Integrity Checker" topic in the Administrator Help for instructions.	
	11 Make sure all users have logged off Sage SalesLogix.	
	12 Instruct all Remote users and Offices to run a final synchronization cycle.	
	13 Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.	
	14 Stop the Sync Service(s). If using a third-party scheduling package, deactivate the Synchronization Server tasks.	
	15 Close all Sage SalesLogix applications and stop all applications and services that access the Sage SalesLogix database using the Sage SalesLogix OLE DB Provider.	
	16 Turn off all debuggers that may interfere with the Sage SalesLogix installation. For Visual Studio installed with Microsoft SQL Server 2005, launch Visual Studio > Tools > Options > Debugging > Just-In-Time > and clear all three options.	
	17 Back up your production database. Verify the backup is successful and complete. Note The Web upgrade process overwrites existing items in your project and support files. Creating a backup is essential if you have customized your Web implementation.	

✓	Task Description	Notes
Upgrade your Main Office		
18	<p>Upgrade your Sage SalesLogix Server using the SLX_v72_SP2 installation. Note Depending on the installation method you choose, service pack files and bundles may not be extracted to your local computer. Ensure you select the appropriate installation method for your upgrade.</p> <p>Task 18 Details</p> <p>You must run the SLX_v72_SP2 installation on every computer where a Sage SalesLogix component is installed. This includes the Sage SalesLogix Server, Administrative Workstation, Sage SalesLogix Network Client, Sage SalesLogix Remote Client, Synchronization Server, SpeedSearch Server, EmPulse Server, Web Host, Web Reporting Server, Web Manager, and Remote Office.</p> <p>To run the installation</p> <ol style="list-style-type: none"> 1 Double-click SLX_v72_SP2.exe. 2 On the SalesLogix v7.2 Service Pack 2 screen, select your installation method: <ul style="list-style-type: none"> • The Install option extracts the service pack files to a temporary folder and removes them once the installation is complete. If you install the service pack from a temporary folder without extracting all the contents to your local computer, the bundles remain in the EXE file within the service pack .zip file and you must extract the bundles from the EXE when you are ready to install them. • The Extract and Install option extracts the service pack files to a location you specify. The files are not removed once the installation is complete. If you choose to extract the files and then install the service pack from your local computer, the bundles are included in the extraction process and can be found on your local computer when you are ready to install them. Selecting the Extract and Install the Service Pack option allows you to distribute a smaller upgrade patch to your Sage SalesLogix Network and Remote users. This process is detailed in Tasks 32 and 33. 3 Click Next. 4 The Welcome screen displays a list of currently installed Sage SalesLogix components. Verify all the components installed on this computer appear in the list, and then click Install. The Update Network Images button is available on the Welcome screen. If you created automated installations of the Sage SalesLogix Client, you can upgrade the installations using this option (you must browse to the .msi file and click Update). Automated installations can be used to install the Sage SalesLogix Client for new users. When properly updated, this installation contains the initial version of the Sage SalesLogix Client and all service packs and hot fixes that have been applied to your system. 5 When the installation indicates a successful upgrade, click Finish. The upgrade is successful when the Status column displays Complete. 6 Restart your computer after the installation to ensure that all changes take effect. You may automatically receive a prompt to restart. 	
19	<p>Upgrade your Administrative Workstation using the SLX_v72_SP2 installation. Note For detailed steps to run the installation, see Task 18.</p>	
20	<p>Upgrade your SpeedSearch Server using the SLX_v72_SP2 installation. Note For detailed steps to run the installation, see Task 18.</p>	
21	<p>Upgrade your EmPulse Server using the SLX_v72_SP2 installation. Note For detailed steps to run the installation, see Task 18.</p>	

✓	Task Description	Notes
	<p>22 Upgrade your Synchronization Server using the SLX_v72_SP2 installation. Note For detailed steps to run the installation, see Task 18.</p> <p>Task 22 Details</p> <p>Before installing the service pack, ensure the Synchronization Service (SLXSyncService) is stopped. In addition, shut down any instances of Synchronization Server in Task Manager.</p>	
	<p>23 Start the Administrator.</p>	
	<p>24 If applicable, implement WebViewer functionality.</p> <p>Task 24 Details</p> <p>Sage SalesLogix WebViewer is enabled with a license and is a subset of the Web Client. WebViewer users require the same hardware, browser, and configuration as Web Client users. WebViewer users have read-only access to accounts, contacts, opportunities, and tickets. Depending on account and calendar security, WebViewer users can add, edit, and delete activities, notes, and history, but cannot use reporting or processes. In addition, WebViewer users are limited in several ways related to teams and security in the Administrator. A WebViewer user cannot:</p> <ul style="list-style-type: none"> • Be the owner of any team. • Be a manager or have anyone report to them. • List any other users in the User Team section of the User Profile Teams tab. <p>To implement WebViewer</p> <ol style="list-style-type: none"> 1 In the Administrator, add your WebViewer license. For detailed steps, see the "Adding a License" topic in the Administrator Help. 2 Add new WebViewer users or convert existing users to WebViewer users. For detailed steps, see the "Adding a User" or "Changing User Type" topics in the Administrator Help. 3 Shut down and unload the <i>Slxweb.dll</i>. For more information, refer to the <i>Sage SalesLogix Web Implementation Guide</i>. 4 Verify that when WebViewer users log on, they have read-only access to contacts, accounts, opportunities, and tickets in the Web Client. 	
Install the Service Pack Bundle		
	<p>25 Use the Administrator to apply the service pack bundle named SalesLogix v7.2 Service Pack 2.sxb. See the "Installing a Bundle" topic in the Administrator Help for instructions.</p> <p>Task 25 Details</p> <p>If you extracted the service pack files to your local computer (Task 18), the bundle is located in the folder you specified. If you installed the service pack without extracting the files, you must extract the bundle from the SLX_v72_SP2.exe before installation.</p> <p>The bundle contents are outlined in Chapter 2, "Changes in this Release". This includes functionality formerly released in hot fixes.</p>	

✓	Task Description	Notes
Add Oracle Schema (if applicable)		
	26 (Oracle Only) Instruct your Oracle DBA to run the CreateOracleViews.sql script.	
	<p>Task 26 Details</p> <p>The CreateOracleViews script adds the necessary Oracle schema for Campaign Targets on the Web. Note The CreateOracleViews.sql script must be run as the sys user.</p> <p>To run</p> <ol style="list-style-type: none"> 1 On the Oracle SQL *Plus Worksheet File menu, click Open. 2 Browse to the CreateOracleViews.sql script. The script is extracted from the zip file to the same folder as the Upgrade document. 3 To load the script into the Query section, click Open. 4 To run the script, click Execute. 	
Upgrade your Network Customizations		
	27 Apply the changes listed in Chapter 2, "Changes in this Release" . You can use one of the following strategies: <ul style="list-style-type: none"> • Add your customizations to the v7.2.2 plugins (recommended). • Add the v7.2.2 changes to your custom plugins. 	
	28 After applying the v7.2.2 changes, release the appropriate plugins using Architect. Note See the "Release a Plugin for Use" topic in the Architect Help for information on releasing plugins.	
Upgrade Synchronization		
	29 Cycle your Synchronization Server(s) so that changes are sent to remotes. Use Custom Sync, since it is not necessary to run subscription. Note See the "Creating a Custom Sync Cycle" topic in the Administrator Help for more information.	
	<p>30 Update your synchronization service jobs.</p> <p>Task 30 Details</p> <p>To ensure compatibility with the Sage SalesLogix Server, you must update your synchronization service jobs.</p> <p>To update</p> <ol style="list-style-type: none"> 1 In the Administrator, click Systems. 2 Click the Sync Automation Services tab. 3 Double-click the first job in the grid. 4 In the Database box, click the Browse button. 5 In the Data Link Manager, select the connection to your Sage SalesLogix database. 6 Click OK. 7 Click OK again. 8 Repeat until all jobs have been updated with the new database connection. 	

✓	Task Description	Notes
	31 Restart the Sync Service(s).	
Upgrade Sage SalesLogix Network Users		
	<p>32 Upgrade each of your Sage SalesLogix Network user's computers using the SLX_v72_SP2 installation or the appropriate .MSP file.</p> <p>Task 32 Details</p> <p>You can upgrade Network users by distributing an .MSP file rather than the entire service pack patch. This file is smaller and upgrades only the necessary Sage SalesLogix Client pieces. The .MSP files are located in the folder you specified when extracting the service pack files (see Task 18).</p> <p>After receiving the file, instruct your Network users to double-click SLX_v72_SP2.exe or Sage SalesLogix Client 7.2 SP2.msp as appropriate. If you installed Sage SalesLogix Intellisync on the Client computer, you must also run the SalesLogix Intellisync 7.2 SP2.msp file to upgrade Intellisync components.</p>	
Upgrade Sage SalesLogix Remote Users/Offices		
	<p>33 Distribute Client installations or .MSP files to your Remote users and Offices. You may want to distribute via e-mail or copy the installations to a shared network drive.</p> <p>Task 33 Details</p> <p>You can upgrade Remote users and Offices by distributing an .MSP file rather than the entire service pack patch. This file is smaller and upgrades only the necessary Sage SalesLogix Client pieces. The .MSP files are located in the folder you specified when extracting the service pack files (see Task 18).</p> <p>Distribute the following .MSP files as appropriate:</p> <ul style="list-style-type: none"> • For Remote users: Sage SalesLogix Client 7.2 SP2.msp • For Remote Offices: Sage SalesLogix Remote Office 7.2 SP2.msp • If you installed Sage SalesLogix Intellisync on the Client computer, you must also run the SalesLogix Intellisync 7.2 SP2.msp file to upgrade Intellisync components. 	
	34 Direct Remote users and Offices to upgrade using the SLX_v72_SP2 installation or the appropriate .MSP file.	
	<p>35 Instruct Remote users and Offices to log on to the Synchronization Client and sync immediately after upgrading.</p> <p>Note Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.</p>	
	36 Instruct users to log on to Sage SalesLogix.	
Upgrade Web Components (if applicable)		
	37 Run the SLX_v72_SP2 installation on your Web Host(s).	
	38 Run the SLX_v72_SP2 installation on your Web Reporting Server.	

✓	Task Description	Notes
	<p>39 If necessary, install the Web Manager on your Web Host for mail merge functionality on the Web.</p> <p>Task 39 Details</p> <p>The Web Manager is required on the Web Host computer to manage the ADO connection string used by mail merge. If Web Manager is not currently installed, use the Web Manager installation on the 7.2 DVD.</p>	
	<p>40 Close the Administrator, stop and restart all Sage SalesLogix services, and reset IIS.</p> <p>Task 40 Details</p> <p>These steps must be completed before opening the Application Architect and applying the Sage SalesLogix Web upgrade bundles.</p>	
Protect Your Web Customizations		
	<p>41 Delete the items in your project recycle bin.</p> <p>Task 41 Details</p> <p>Any items in the project's recycle bin will be bundled as delete actions by the Bundler. These delete actions remove the associated item from the target project when the bundle is installed. Empty the recycle bin in the Application Architect before using the Bundler (in Task 42) to prevent these actions from being included in your bundle.</p> <p>To delete</p> <ol style="list-style-type: none"> 1 On the Application Architect View menu, click Project Recycle Bin. 2 Remove the appropriate delete actions. 	

✓	Task Description	Notes
	<p>42 If you have customized any of the Web components, create a bundle of your Web customizations.</p> <p>Task 42 Details</p> <p>You can use the Bundler.exe command line utility to create a bundle that only contains your customizations. The Bundler compares your current project with a previous Sage SalesLogix version and creates a bundle of changes. For more information on the Bundler, see the "Bundler.exe" and "Using Build and Deploy Automation Tools" topics in the Application Architect Help.</p> <p>To bundle Web customizations</p> <ol style="list-style-type: none"> 1 Locate the project backup zip file appropriate to your Sage SalesLogix version. If you selected the Extract and Install option when running the service pack installation, the default location for the project backup files is C:\Documents and Settings\username\Local Settings\Temp\SalesLogix folder. If you are upgrading from: <ul style="list-style-type: none"> • v7.2 - use Sage SalesLogix v7.2 Project Backup. • v7.2.1 without Leads - use Sage SalesLogix v7.2 SP1 Project Backup. • v7.2.1 with Leads - use Sage SalesLogix v7.2 SP1 Leads Project Backup. 2 Extract the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 3 Create a configuration file for the Bundler using the SampleBundleConfig.xml file as a model. Define the connection string in a text editor (such as WordPad) using the following parameters: <ul style="list-style-type: none"> • Provider - The name of the Sage SalesLogix OLE DB Provider. • Password - The Sage SalesLogix admin password. • User ID - The Sage SalesLogix admin. • Initial Catalog - Your Sage SalesLogix database name. • Data Source - Your Sage SalesLogix database server. • PORT - The port the Sage SalesLogix Server is listening on. <p>The remaining configuration file elements set properties on the bundle manifest that will be included in the bundle you create.</p> <p>Note The SampleBundleConfig.xml file is read only. If you prefer to modify the sample configuration file, open the file properties and clear the Read-only check box.</p> 4 Execute the Bundler.exe from a command line using a bundle method of "Diff". By default, the Bundler is installed in C:\Program Files\SalesLogix\Architect. The following is an example command line. Arguments are case-sensitive. Bundler.exe /ProjectPath:"VFS:\Model" /BundleFileName:"C:\Bundles\My721Customizations.zip" /ConfigFileName:"C:\SampleBundleConfig.xml" /BundleMethod:Diff /PreviousProjectPath:"C:\SLX721\Model" <ul style="list-style-type: none"> • C:\Bundles\My721Customizations.zip - The name and location of the bundle that the Bundler creates. This bundle contains your customizations. • C:\SampleBundleConfig.xml - The name and location of the configuration file you created in step 3. 	

✓	Task Description	Notes
Install Web Bundles		
43	<p>Use Application Architect to apply the appropriate Web upgrade bundles. Note If you have customized any Web components, make sure you create a bundle containing all of your Web customizations before applying the bundles (Task 42).</p>	
<p>Task 43 Details</p> <p>Before applying the bundles, ensure the Sage SalesLogix Network components have been upgraded (including all required bundles) and are working correctly. Note The Web Leads bundle is required for all Sage SalesLogix installations. Version 7.2.2 does not run properly if this bundle is not installed.</p> <p>Install the Web bundles in the following order according to your current Sage SalesLogix version.</p> <p>If your current version is 7.2.0, apply:</p> <ol style="list-style-type: none"> 1 Sage SalesLogix v7.2 SP1 VFS Upgrade.zip 2 SLX_v72_SP1_WebLeadsBundle.zip 3 Sage SalesLogix v7.2 SP2 VFS Upgrade.zip <p>Note The Sage SalesLogix v7.2 SP2 VFS Upgrade bundle contains changes from v7.2.1 Web Leads to 7.2.2. This bundle is not cumulative for changes since v7.2.</p> <p>If your current version is 7.2.1 without Leads, apply:</p> <ol style="list-style-type: none"> 1 SLX_v72_SP1_WebLeadsBundle.zip 2 Sage SalesLogix v7.2 SP2 VFS Upgrade.zip <p>If your current version is 7.2.1 with Leads, apply:</p> <ol style="list-style-type: none"> 1 Sage SalesLogix v7.2 SP2 VFS Upgrade.zip <p>To install</p> <ol style="list-style-type: none"> 1 From the Project Explorer, right-click the Project folder, and then click Install Bundle. The Select Bundle to Install dialog box opens. 2 Browse to the bundle and then click Open. The Install Bundle (Select Bundle) dialog box opens. 3 If necessary, click the Bundle Path ellipses button, browse to the correct bundle path, and then click Next. 4 On the Select Items screen, ensure the Entity Model and Portals check boxes are selected. 5 Click Next. If you see notification in bold red text of conflicting items, you can ignore the messages. Duplicate items are managed when installing your custom bundle in Task 46. 6 Click Finish. 		
44	Delete items in your project recycle bin.	
<p>Task 44 Details</p> <p>The Sage SalesLogix v7.2 SP2 VFS Upgrade.zip bundle deletes a large number of ORM relationship files and places them in the Application Architect Project Recycle Bin. You must delete these files after applying the SP2 VFS upgrade bundle. If they are not deleted and you restore them at a later date, Sage SalesLogix will no longer function.</p> <p>To clear the project recycle bin</p> <ol style="list-style-type: none"> 1 On the Application Architect View menu, click Project Recycle Bin. 2 Remove items deleted on the date you installed the SP2 VFS upgrade bundle. 		

✓	Task Description	Notes
	<p>45 Back up the Sage SalesLogix support files. Note If you have not customized Sage SalesLogix support files, disregard this task and proceed to Task 46.</p> <p>Task 45 Details</p> <p>If you have customized any Sage SalesLogix support files (for example, custom forms, smart parts, or binary files), you need to merge the changes with Sage changes. This merge must be done after installing your custom bundle and merging other changes. Before merging, create a backup of the Sage SalesLogix support files installed with the Web upgrade bundle(s) in Task 43.</p> <p>To back up support files</p> <ol style="list-style-type: none"> 1 On the Application Architect View menu, click Virtual File System Explorer. 2 Right-click the Webroot folder, and then click Copy To. 3 Save to a folder on your local drive (for example, C:\SLX) and then click OK. 	
	<p>46 Use Application Architect to apply your custom bundle. Note If you have not customized your Web implementation, disregard this task.</p> <p>Task 46 Details</p> <p>You have the option of merging your customizations and the Sage SalesLogix changes into the current project during bundle installation. You can also validate the changes if there are duplicate items between the current project and the bundle you are installing.</p> <p>Note The default behavior is to overwrite the item in the target project (the 7.2.2 Sage SalesLogix version of the item) with your customization (from the customization bundle).</p> <p>After a merge, the modified file is the one that will be installed. It is not recommended to modify both files during a merge. However, if both files are modified, the file on the left is kept (this may depend on your differencing tool).</p> <p>To merge changes during bundle installation</p> <ol style="list-style-type: none"> 1 In the Project Explorer, right-click your project folder, and then click Install Bundle. The Select Bundle to Install dialog box opens. 2 Browse to and select the bundle containing your customizations that you created in Task 42, and then click Open. The Install Bundle (Select Bundle) dialog box appears. 3 Click the Optional Merged Content Path from a Previous Install ellipsis button to browse to the folder containing merged customizations from a previous install, and then click OK. 4 Click Next. The Install Bundle (Select Items) dialog box opens. 5 On the Select Items screen, ensure the Entity Model and Portals check boxes are selected. This screen indicates the number of items that conflict with existing items in the current project. 6 Review the Support Files Bin folder for each portal application in your bundle and clear any DLLs that begin with Sage. You must select the item, and then clear the check box. The Bundler may include assembly support files that are developed by Sage in your customization bundle. These files are not necessary for the merge process. 7 If you want to save changes made during the bundle installation, click the Preserve Merged Content button. By default, all changes are saved to a temporary folder, and then deleted after the bundle installation is complete. When you preserve merged content, the folder containing merged customizations is not deleted. 	

✓	Task Description	Notes
	<p data-bbox="220 262 553 296">Task 46 Details - continued</p> <p data-bbox="266 338 1474 394">8 Clear the Only stop at items that require user intervention check box if you want to view only duplicate items in the bundle. By default, when this check box is selected and you move through the items in the tree view, the cursor stops only on items that require user intervention. The behavior at install for the duplicate items is controlled by the selected install action.</p> <p data-bbox="266 499 1474 648">9 Use the Next Dup and PrevDup buttons to select and resolve any duplicate items. Items in red in the tree view indicate duplicates. These duplicates represent customized items in your bundle that are also in the v7.2.2 project to which you are installing. A duplicate item with an install action set to DiffMerge requires the item to be merged before continuing the installation.</p> <p data-bbox="266 659 1474 812">10 In the Install Action drop-down list, select DiffMerge. DiffMerge allows you to use a third-party differencing tool to compare a customization in your bundle with the duplicate customization in your project, and to merge the differences between the two. If you do not have a third-party differencing tool configured, you are prompted to configure one. Beyond Compare has a 30-day free trial: www.scootersoftware.com.</p> <p data-bbox="266 823 1474 905">Note The AutoMerge and CustomManualMerge install actions are not currently supported. The unsupported actions do not show as options during installation, but show in the property browser for items in a bundle manifest.</p> <p data-bbox="266 915 1474 1005">11 After making your changes, click Merge Item. The Merge Item button is enabled only when the DiffMerge install action is selected. If you clear a check box, the changes to that item will not be installed.</p> <p data-bbox="266 1016 1474 1098">Note Some bundle items have multiple files (.resx files). Your differencing tool will display them twice; once for the main file, and once for the .resx file. If there are no changes in the linked .resx file, it does not display.</p> <p data-bbox="266 1108 1474 1199">12 (Optional) To modify an item in the Bundle Model tree view without having to use a differencing tool again, click an item in the tree view, and then click View Item. The View Bundle Item text editor opens.</p> <p data-bbox="266 1209 1474 1272">13 To remove all changes you have made to an item, click Undo Changes. This removes all changes and reverts to the original state of the item in the bundle.</p> <p data-bbox="266 1283 456 1310">14 Click Next.</p> <p data-bbox="266 1320 472 1348">15 Click Finish.</p>	

✓	Task Description	Notes
	<p>47 Merge your support files customizations with Sage changes. Note If you have not customized Sage SalesLogix support files, disregard this task.</p> <p>Task 47 Details</p> <p>If you have customized any Sage SalesLogix support files, the v7.2.2 Sage changes may have been overwritten when applying your custom bundle in Task 46. To restore the Sage changes, you must merge your customizations with the Sage support files.</p> <p>To merge</p> <ol style="list-style-type: none"> 1 On the Application Architect View menu, click Virtual File System Explorer. 2 Right-click the Webroot folder, and then click Copy To. 3 Save to a folder on your local drive (for example, C:\custom) and then click OK. 4 Backup the folder that you want to merge your customizations into. This is generally the folder that contains the most changes. <ul style="list-style-type: none"> • C:\SLX - this folder (created in Task 45) contains the Sage SalesLogix v7.2.2 support files. • C:\custom - this folder (created in the previous step) contains your support files customizations. 5 Use a third-party differencing tool to merge your customizations with the Sage changes. 6 Import the merged folder back into VFS using FSCopy. <p>For more information on FSCopy, see the "FSCopy.exe" topic in the Application Architect Help.</p>	
	<p>48 If necessary, update the Web Help Configuration file. Note If you added or edited this file in a previous installation, you need to merge your changes.</p> <p>Task 48 Details</p> <p>The SLX_v72_SP2 installation overwrites the existing Web Help Configuration file with the updated v7.2.2 file. If you have customized this file, you must reapply your customizations to the v7.2.2 file.</p> <p>To update</p> <ol style="list-style-type: none"> 1 Create a backup of the v7.2.2 WebHelpConfiguration-91954CEA-EAB9-4fbf-97DA-B11E4BE4EF1C.xml file located in C:\Documents and Settings\All Users\Application Data\Sage\Platform\Configuration\Application\SalesLogix. The Web Help Configuration file is placed in this folder when you run the SLX_v72_SP2 installation on the Web Host (Task 37). A backup is recommended before restoring your customizations. If errors occur while merging changes and you do not have a backup of the v7.2.2 Help, you must reapply the upgrade patch to access a copy. 2 Compare the v7.2.2 Web Help Configuration file to your customized version. The upgrade patch created a backup of your customized file in C:\Documents and Settings\All Users\Application Data\SalesLogix\ BackupYYYYMMDDNNMM. You may need to enable hidden files to see the backup. 3 Add your customizations to the v7.2.2 Web Help Configuration file. 4 Save and close the updated file in C:\Documents and Settings\All Users\Application Data\Sage\Platform\Configuration\Application\SalesLogix. 	

✓	Task Description	Notes
Build and Deploy your Web Portals		
49	<p>Use the Application Architect to build and deploy the appropriate Web portal(s). See the "Building the Web Platform" and "Deploying Web Portals" topics in the Application Architect Help for instructions.</p> <p>Note You must complete a full build (using the CTRL key) of the Web platform when upgrading.</p>	
50	Configure IIS Settings for Performance.	
<p>Task 50 Details</p> <p>In order to cache, and therefore improve performance, Sage SalesLogix recommends you use the following IIS settings for the css, images, and jscript subdirectories in each Web Client portal that you deploy.</p> <p>To configure</p> <ol style="list-style-type: none"> 1 In IIS Manager, expand Web Sites, and then expand the Web site containing the Web Client portal you want to configure for performance. 2 Expand SlxClient, right-click the css subdirectory folder, and then click Properties. 3 Click the HTTP Headers tab. 4 Select the Enable content expiration check box. 5 Select Expire after and set the expiration for 90 days. Setting the expiration for a longer time period is recommended. The content is non-changing data, therefore the content does not need to be updated on a regular basis. 6 When you are finished, click Apply. 7 Repeat steps 2-6 for the images and jscript subdirectories, and then click OK. 		

✓	Task Description	Notes
Perform Post-Upgrade Tasks		
	<p>51 Configure Windows Authentication for Web Client users on Windows 2000 or Windows XP. For Windows 2003, see Task 52.</p> <p>Note Windows Authentication requires the setspn.exe. For download information, go to www.microsoft.com and search on:</p> <ul style="list-style-type: none"> • (Windows 2000) Windows 2000 Resource Toolkit • (Windows XP) Windows XP Service Pack 2 Support Tools <p>Task 51 Details</p> <p>Windows Authentication allows Web users to automatically log on to the Web Client using their Microsoft Windows logon credentials. This method uses a cryptographic exchange with the user's Web browser to confirm the identity of the user.</p> <p>Note Windows XP is not a server class operating system. Therefore, Sage SalesLogix does not recommend Windows XP for a Web production environment due to scalability issues. You can use the following steps to configure Windows Authentication on Windows XP in a demonstration environment.</p> <p>To configure</p> <ol style="list-style-type: none"> 1 Open the Administrator. 2 Configure the ASPNET user for Windows Authentication. <ul style="list-style-type: none"> In Windows 2000 and Windows XP, you must allow the Sage SalesLogix Web Client to open a connection to the Sage SalesLogix database. a On the Navigation Bar, click Users. b In the Users view, double-click the Administrator's user name, and then click the General tab. c Select the Use Windows Authentication check box. d In the Windows ID box, click the Find button. <ul style="list-style-type: none"> The Please select a Windows user to match the SalesLogix user dialog box appears. e In the Add Name box, type your server name and ASPNET user name, and then click OK. <ul style="list-style-type: none"> For example, servername\ASPNET. f In the Import user data box, click No, and then click OK. 3 Enable Windows Authentication for each Web Client user. <ul style="list-style-type: none"> a On the Navigation Bar, click Users. b In the Users view, double-click the appropriate user's name, and then click the General tab. c Select the Use Windows Authentication check box. d In the Windows ID box, click the Find button. e Select a Windows user and click OK. <ul style="list-style-type: none"> If you are prompted to choose whether to import user data from Active Directory, click one of the following: <ul style="list-style-type: none"> • Yes – Information in the user's profile is overwritten with information from Active Directory. • No – Only the fullname and Windows security identifier (SID) are imported. Fullname is parsed into First Name and Last Name. f Click OK. 4 On the Web Server computer, log on as a domain administrator or as a user with rights to modify the Active Directory. 	

✓	Task Description	Notes
	Task 51 Details - continued	
5	On the Web Server computer, add IIS permissions for Web Client users or groups.	
a	In Windows Explorer, browse to the SixClient folder located in the ...\\inetpub\\wwwroot folder.	
b	Right-click the SixClient folder, and then click Properties .	
c	In the Properties dialog box, click the Security tab.	
d	Click Add .	
e	In the Select Users, Computers, or Groups dialog box, enter the Web Client users or groups.	
f	Click OK .	
6	Open a Command Prompt window.	
a	Run setspn.exe to manually modify the service account's SPN information to run correctly with Windows Authentication.	
	Service Principal Names (SPNs) are used to locate a target principal name for running a service. The setspn.exe is included in the Windows 2000 Resource Toolkit and Windows XP Service Pack 2 Support Tools.	
b	At the command prompt, type the following command. setspn -A http/server.domain.com domain\username	
	The server.domain.com is the fully qualified machine name, the domain is the Sage SalesLogix domain, and the user name is the user that has rights to modify the active directory (this is the user specified in the application pool).	
c	At the command prompt, type the following command. setspn -A http/server domain\username	
	The server is the machine name, the domain is the Sage SalesLogix domain, and the user name is the user that has rights to modify the active directory (this is the user specified in the application pool).	
d	At the command prompt, type the following command. setspn -L http/domain\username	
	This step checks to ensure the SPN entries created in steps b and c have been registered correctly. If you do not see the two entries, repeat steps b and c.	
7	On the Web Server computer, enable integrated Authentication.	
a	Open the Control Panel , double-click Administrative Tools , and then double-click Internet Information Services (IIS) Manager .	
b	Expand the Web Server computer name, right-click the Sage SalesLogix Web site, and then click Properties .	
c	In the Properties dialog box, click the Directory Security tab.	
d	In the Anonymous Access and Authentication Control section, click Edit .	
e	Ensure the Anonymous Access and Integrated Windows authentication check boxes are selected.	
f	Click OK .	
8	On each Web Client computer, update the address to the Sage SalesLogix Web Client to include the windows.aspx page. For example, http://servername/SixClient/windows.aspx.	
	This address may be saved in Favorites.	

✓	Task Description	Notes
	<p>52 Configure Windows Authentication for Web Client users on Windows 2003. For Windows 2000 or Windows XP, see Task 51.</p> <p>Note Windows Authentication requires the setspn.exe. For download information, go to www.microsoft.com and search on Windows 2003 Support Tools.</p> <p>Task 52 Details</p> <p>Windows Authentication allows Web users to automatically log on to the Web Client using their Microsoft Windows logon credentials. This method uses a cryptographic exchange with the user's Web browser to confirm the identity of the user.</p> <p>To configure</p> <ol style="list-style-type: none"> 1 On the Web Server computer, log on as a domain administrator or as a user with rights to modify the Active Directory. This user should be the Application Pool user. 2 Enable Windows Authentication for each Web Client user. <ol style="list-style-type: none"> a On the Navigation Bar, click Users. b In the Users view, double-click the appropriate user's name, and then click the General tab. c Select the Use Windows Authentication check box. d In the Windows ID box, click the Find button. e Select a Windows user and click OK. If you are prompted to choose whether to import user data from Active Directory, click one of the following: <ul style="list-style-type: none"> • Yes – Information in the user's profile is overwritten with information from Active Directory. • No – Only the fullname and Windows security identifier (SID) are imported. Fullname is parsed into First Name and Last Name. f Click OK. 3 Add permissions for Web Client users or groups. <ol style="list-style-type: none"> a In IIS, right-click the Application Pools folder, and then click Properties. b Click the Identity tab. Verify that the user indicated in the User name: box is the user logged in as the domain administrator or user with rights to modify the Active Directory. 4 Open a Command Prompt window. <ol style="list-style-type: none"> a Run setspn.exe to manually modify the service account's SPN information to run correctly with Windows Authentication. Service Principal Names (SPNs) are used to locate a target principal name for running a service. The setspn.exe is included in the Windows 2003 Support Tools. b At the command prompt, type the following command. setspn -A http/server.domain.com domain\username The server.domain.com is the fully qualified machine name, the domain is the Sage SalesLogix domain, and the user name is the user that has rights to modify the active directory (this is the user specified in the application pool). c At the command prompt, type the following command. setspn -A http/server domain\username The server is the machine name, the domain is the Sage SalesLogix domain, and the user name is the user that has rights to modify the active directory (this is the user specified in the application pool). d At the command prompt, type the following command. setspn -L http/domain\username This step checks to ensure the SPN entries created in steps b and c have been registered correctly. If you do not see the two entries, repeat steps b and c. 	

✓	Task Description	Notes
	<p>Task 52 Details - continued</p> <ol style="list-style-type: none"> 5 On the Web Server computer, add IIS permissions for Web Client users or groups. <ol style="list-style-type: none"> a Open the Control Panel, double-click Administrative Tools, and then double-click Internet Information Services (IIS) Manager. b Expand the Web Server computer name, expand Web Sites, and then expand the name of the Web site where you deployed the Sage SalesLogix Web Client portal. c Right-click SlxClient, and then click Permissions. d On the Security tab, click Add. e In the Select Users or Groups dialog box, add your Web Client domain users, and then click OK. 6 On the Web Server computer, enable Integrated Authentication. <ol style="list-style-type: none"> a Open the Control Panel, double-click Administrative Tools, and then double-click Internet Information Services (IIS) Manager. b Expand the Web Server computer name, expand Web Sites, and then expand the name of the Web site where you deployed the Sage SalesLogix Web Client portal. c Right-click SlxClient, and then click Properties d In the Properties dialog box, click the Directory Security tab. e In the Authentication and access control section, click Edit. f Ensure the Enable anonymous access check box is selected. g Ensure the Integrated Windows authentication check box is selected. h Click OK. 7 On each Web Client computer, update the address to the Sage SalesLogix Web Client to include the windows.aspx page. For example, http://servername/SlxClient/windows.aspx. This address may be saved in Favorites. 	
	<p>53 Enable Windows Authentication for your company.</p> <p>Task 53 Details</p> <p>After configuring Windows Authentication, you must enable it for your company in the Administrator.</p> <p>To enable</p> <ol style="list-style-type: none"> 1 Open the Administrator. 2 On the Tools menu, click Options. 3 In the Options dialog box, click the Passwords tab. 4 Select Use Windows Authentication (SalesLogix Password not required to log on). 5 Click OK. 	
	<p>54 If necessary, in the location where you extracted the service pack files (Task 18), delete the extracted files. These files are automatically deleted if you selected the Install the Service Pack option.</p>	

Chapter 2

Changes in this Release

In addition to the new functionality described in Workplan Tasks 4 and 5, this service pack fixes product defects. This includes defects previously addressed in hot fixes.

Refer to the Fixed Issues List for v7.2.2 on SupportOnline/Sage Online Support and Services for all defects fixed in this service pack.

Plugin changes are listed in the following sections by category (new or existing), type (form, script, and so on), and then alphabetically by plugin name within the category and type.

Note Some scripts and forms have been modified for the Sage SalesLogix ERP Link release. ERP Link requires Sage SalesLogix v7.2.1 or later to function.

Finding Script Changes

Changes to Sage SalesLogix scripts, and scripts on forms, can be researched using a third-party comparison utility such as Beyond Compare or Microsoft Word. You can use the following example procedure to determine the Sage SalesLogix script changes in this release. Then, use that information to update your custom scripts with the Sage SalesLogix changes, or add your customizations to the Sage SalesLogix script.

To find script changes

1. Apply the upgrade bundle to a test environment.
2. Open the original version of the script or form you want to research in the Architect.
3. Right-click the script, and then click **Select All**.
4. Copy and paste the information to a text editor, such as WordPad.
5. Save the script with the version number in the name.
6. Repeat steps 2 - 5 for the same plugin updated in this release.
7. Open the original plugin version in Microsoft Word (saved in step 5).
8. On the **Tools** menu, click **Compare and Merge Documents**.
9. Browse to and select the updated plugin (saved in step 6) and click **Merge**.
10. View the code changes and determine how to merge the Sage SalesLogix changes with your customizations.

New Tables

Table Name	7.2.1	7.2.2
IMPORTHISTORY	✓	
IMPORTTEMPLATE	✓	

New Visual Basic Scripts

Script Name	7.2.1	7.2.2
System:ERP Link Base Common <ul style="list-style-type: none"> Added to support Sage SalesLogix ERP Link integration (integration between Sage MAS 90/200 and Sage MAS 500). 	✓	

Changes to Existing Forms

Form Name / Change	7.2.1	7.2.2
Account:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True, Sortable to True, and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Account:Contacts <ul style="list-style-type: none"> For the grdContacts:TDataGrid, set Width to 360. 	✓	
Account:Contracts		✓
Account:Details <ul style="list-style-type: none"> Modified the script on the form. 	✓	
Account:Literature Requests <ul style="list-style-type: none"> For the grdLitRequest:TDataGrid control, set the Fulfilled By column Sorted property to csDown. 		✓
Account:Notes <ul style="list-style-type: none"> Modified the script on the form. 		✓
Account:Notes-History <ul style="list-style-type: none"> Modified the script on the form. 		✓
Campaign:Targets <ul style="list-style-type: none"> Modified the script on the form. 		✓
Contact:Associations <ul style="list-style-type: none"> Modified the script on the form. 	✓	
Contact:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Contact:Details <ul style="list-style-type: none"> Modified the script on the form. 	✓	✓
Contact:Literature Requests <ul style="list-style-type: none"> For the grdLitRequest:TDataGrid control, set the Fulfilled By column Sorted property to csUp. 		✓
Contact:Notes <ul style="list-style-type: none"> Modified the script on the form. 		✓
Contact:Notes-History <ul style="list-style-type: none"> Modified the script on the form. 		✓
Contact:Opportunities <ul style="list-style-type: none"> For the grdOppContacts:TDataGrid control, set the OnCompareNotes event to grdOppContactsCompareNotes. Modified the script on the form. 		✓

Form Name / Change	7.2.1	7.2.2
Contract:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Defect:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Lead:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Opportunity:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
Opportunity:Notes-History <ul style="list-style-type: none"> Modified the script on the form. 		✓
Opportunity:Products <ul style="list-style-type: none"> (7.2.1.3) Modified the script on the form. 		✓
Opportunity:Sales Process <ul style="list-style-type: none"> Modified the script on the form. 	✓	✓
RMA:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	
RMA:Return Details <ul style="list-style-type: none"> Modified the script on the form. 		✓
RMA:Ship To Details <ul style="list-style-type: none"> Modified the script on the form. 	✓	
Sales Dashboard:Pipeline Status <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Account Detail <ul style="list-style-type: none"> For the lueParent:TLookupEdit control, set ReadOnlyEditor to True. 		✓
System:Activity Details View <ul style="list-style-type: none"> Added the chkRollover:TCheckBox control. Modified the script on the form. 		✓
System:Add Edit Area Category Issue <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Add Edit Product <ul style="list-style-type: none"> Modified the script on the form. 	✓	
System:Add Edit Response <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Add Edit Return Address <ul style="list-style-type: none"> Modified the TabOrder for the lblAddress1:TLabel, lblAddress2:TLabel, lblCity:TLabel, lblCountry:TLabel, lblState:TLabel, lblZip:TLabel, pnlButtons:TPanel, txtAdd:TEdit, txtAdd2:TEdit, txtAdd3:TEdit, and txtZip:TEdit controls. Modified the TabOrder and set TabStop to True for the pklCity:TPickList, pklCountry:TPickList, and pklState:TPickList controls. For the pklDescription:TPickList, set TabStop to True. Added the hidden txtRMAID:TEdit control. 	✓	

Form Name / Change	7.2.1	7.2.2
System:Add Edit Sales Order <ul style="list-style-type: none"> (7.2.1) Modified the script on the form. (7.2.2) Added the txtCurrencyCode:TEdit control to the form. Modified the script on the form. 	✓	✓
System:Add New Contact Account <ul style="list-style-type: none"> Modified the script on the form. 	✓	
System:Add Opportunity Product <ul style="list-style-type: none"> Modified the script on the form. 	✓	✓
System:Campaign Detail <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Create Group From Targets <ul style="list-style-type: none"> Added the cboType:TComboBox control. Removed the txtType:TEdit control. Modified the script on the form. 		✓
System:Defect Detail		✓
System:History Details View <ul style="list-style-type: none"> Added bvlBottom:TBevel, cboFollowUp:TComboBox, and lblAutoFollowUp:TLabel controls. Modified the size of the bvlMiddle:TBevel and bvlTop:TBevel controls. For frmHistoryDetails:TAXForm, set the OnAfterPost event to AXFormAfterPost. For lblUsers:TLabel, set FontColor to clBlue. Modified the TabOrder and location of various controls on the form. Modified the script on the form. 		✓
System:Insert Opportunity <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Keyword Search <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Manage Alternate Addresses <ul style="list-style-type: none"> (7.2.1) Modified the script on the form. (7.2.2) For the grdAddresses:TDataGrid control, set the OnChangeNode event to grdAddressesChangeNode. Modified the script on the form. 	✓	✓
System:Manage Product <ul style="list-style-type: none"> Modified the script on the form. 	✓	
System:Manage Targets <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Opportunity Detail <ul style="list-style-type: none"> (7.2.1) For the pkIProbability:TPickList control, set TextType to ttCode. (7.2.1.3) For the lveSource:TLookupEdit control, set the OnPopup event to lveSourcePopup. Modified the script on the form. (7.2.2) Modified the script on the form. 	✓	✓
System>Select Area Category Issue <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:SLX Manage Hierarchy <ul style="list-style-type: none"> Added the tmrChangeAccount:TTimer control. Modified the script on the form. 		✓
System:SLX Report Manager View <ul style="list-style-type: none"> Modified the script on the form. 		✓
System:Ticket Detail <ul style="list-style-type: none"> Modified the script on the form. 	✓	

Form Name / Change	7.2.1	7.2.2
Ticket:Attachments <ul style="list-style-type: none"> For the grdAttach:TDataGrid, set MultiSelect to True and OnRowSelect to grdAttachRowSelect. Modified the script on the form. 	✓	

Updated Global Scripts

The following scripts are changed in this release. See ["Finding Script Changes" on page 23](#) to determine Sage SalesLogix changes.

Script Name	7.2.1	7.2.2
System:Global Campaign		✓
System:Global Reports		✓
System:Global SpeedSearch	✓	

Updated Visual Basic Scripts

The following scripts are changed in this release. See ["Finding Script Changes" on page 23](#) to determine Sage SalesLogix changes.

Script Name	7.2.1	7.2.2
Dashboard:Content Set Support		✓
Dashboard:Export Support		✓
System:Attachment Support	✓	
System:Insert Opportunity Common	✓	✓
System:Insert Ticket	✓	
System:SLX_CopyInfoToClipboard		✓
System:SLX Crystal Report		✓
System:SLX_Multi_Currency		✓
System:SLX Report Condition Builder		✓
System:SLX Report Controller		✓
System:SP_SalesProcessFunctions	✓	✓

Changes to Existing Reports

Report Name / Change	7.2.1	7.2.2
Activities:Current Activities - Sample <ul style="list-style-type: none"> Updated the XML on the Execution tab to reflect the elements and keywords used for filter conditions. 	✓	
Defect:Support Defect <ul style="list-style-type: none"> Modified to fix an error that occurred when viewing associated tickets. 	✓	

Report Name / Change	7.2.1	7.2.2
History:Support Call History - Sample <ul style="list-style-type: none"> Modified UpdateSlxActivityfromActivity to not update the Category field. The Category field should be read-only from the Calendar. 	✓	
RMA:Support Return Material Authorization <ul style="list-style-type: none"> Modified the RMA To Address to point to the RMAAddress record rather than the Account address. 		✓

Changes to Existing Groups

Group Name / Change	7.2.1	7.2.2
Ticket:Web Portal All Tickets <ul style="list-style-type: none"> Changed the Account column to Accountid. Set Field to Ticket.Accountid and Width to 120. 	✓	
Ticket:Web Portal Closed Tickets <ul style="list-style-type: none"> Changed the Account column to Accountid. Set Field to Ticket.Accountid and Width to 120. 	✓	
Ticket:Web Portal Open Tickets <ul style="list-style-type: none"> Changed the Account column to Accountid. Set Field to Ticket.Accountid and Width to 120. 	✓	