

Applying Hot Fix 3 for Sage SalesLogix Version 7.5.1

Version 7.5.1.3

Developed by Sage SalesLogix User Assistance



Your business in mind.

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Documentation Comments	This documentation was developed by Sage SalesLogix User Assistance. For content revisions, questions, or comments, contact the writers at saleslogix.techpubs@sage.com .
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Version	Version 7.5.1.3 2009
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Applying Hot Fix 3 for Sage SalesLogix Version 7.5.1

This hot fix addresses the following issues:

Defect	Description
1-67949	Intellisync throws an error when the Notes or LongNotes field contains certain characters.
1-68423	If a user includes special characters in the notes of an Outlook activity, the notes are removed when Intellisync runs.
1-69553	When users sync contacts an IS4 Web error occurs.
1-69623	Table is not initialized, so recurring To-do's fail.
1-69654	A new contact created in Outlook will not sync to SalesLogix, and on the next sync is removed from Outlook.
1-71442	Intellisync will not function when the web site has SSL enabled.

This hot fix requires version 7.5.1. Do not install this hot fix on any other Sage SalesLogix version. Contact your support representative or go to <http://support.saleslogix.com> to obtain the hot fix.

File Information

File Name	File Contents
SLX_v751_HF3.zip	SLX_v751_HF3.exe, Sage SalesLogix v7.5 HF3 VFS Upgrade.zip
SLX_v751_HF3.exe	IntellisyncSetup.exe
Sage SalesLogix v7.5 HF3 VFS Upgrade.zip	Interop.SlxLoggingObj2.dll, Sage.SalesLogix.Intellisync.dll, Sage.SalesLogix.Intellisync.Entity.dll, Sage.SalesLogix.Intellisync.Schema.dll, Sage.SalesLogix.Intellisync.SyncModule.dll, Web.Config.

Applying the Hot Fix

Depending on your implementation, you may need to install this hot fix on multiple computers. Read all the following sections to update all computers with Intellisync installed.

Important

After applying Hot Fix 3, each Client computer must run a synchronization cycle. If you uninstalled/reinstalled Intellisync, you **MUST** use the **Re-Sync** option for your first synchronization cycle after applying Hot Fix 3. If you do not use Re-Sync, you may see duplicates in your database. This process is outlined in "[Synchronizing the Intellisync Client](#)" on [page 5](#).

Administrator

Apply the hot fix to all Administrator computers, where the Administrative Workstation and Intellisync were installed at the same time.

To apply

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. Extract the contents of the **SLX_v751_HF3.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
4. On the **SalesLogix - v7.5.1 Hot Fix 3** screen, select your installation method:
 - **Install the SalesLogix Hot Fix** extracts the hot fix files to a temporary folder and removes the files once the installation is complete.
 - **Extract and Install the SalesLogix Hot Fix** extracts the hot fix files to a location you specify. The files are not removed once the installation is complete. If you choose this option, select a location where you want to store the hot fix files.
5. Click **Next**.
6. On the **Welcome** screen, click **Install**.
7. On the **Completed** screen, click **Finish**.

Generated SalesLogix Network and Remote Client Installations

Apply the hot fix to the location(s) where you created automated installations of the Sage SalesLogix Network and/or Remote Client.

To apply

1. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
2. On the **SalesLogix - v7.5.1 Hot Fix 3** screen, select your installation method:
 - **Install the SalesLogix Hot Fix** extracts the hot fix files to a temporary folder and removes the files once the installation is complete.
 - **Extract and Install the SalesLogix Hot Fix** extracts the hot fix files to a location you specify. The files are not removed once the installation is complete. If you choose this option, select a location where you want to store the hot fix files.
3. Click **Next**.
4. On the **Welcome** screen, click **Update Network Images**.
5. Click **Add Path** and browse to the location of the **.msi** file.
6. Select the **.msi** file and click **Open**.
7. Click **Update**.
8. On the **Welcome** screen, click **Cancel**.

Remote Client Installations

Apply the hot fix to all Sage SalesLogix Remote Client computers running Intellisync.

To apply

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. Extract the contents of the **SLX_v751_HF3.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
4. On the **SalesLogix - v7.5.1 Hot Fix 3** screen, select your installation method:
 - **Install the SalesLogix Hot Fix** extracts the hot fix files to a temporary folder and removes the files once the installation is complete.
 - **Extract and Install the SalesLogix Hot Fix** extracts the hot fix files to a location you specify. The files are not removed once the installation is complete. If you choose this option, select a location where you want to store the hot fix files.
5. Click **Next**.
6. On the **Welcome** screen, click **Install**.
7. On the **Completed** screen, click **Finish**.
8. Instruct users to run a synchronization cycle. See ["Synchronizing the Intellisync Client" on page 5](#) for details.

Remote Office Installations

Use one of the following scenarios to update your Remote Office.

Remote Office - Scenario 1

Use the following steps to upgrade your Remote Office computers where the Intellisync portal was created during the Remote Office installation. If you did not install the Intellisync portal during the Remote Office installation and deployed the portal to the Remote Office using Application Architect, see ["Remote Office - Scenario 2"](#) in the next section.

To apply

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. Extract the contents of the **SLX_v751_HF3.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
4. On the **SalesLogix - v7.5.1 Hot Fix 3** screen, select your installation method:
 - **Install the SalesLogix Hot Fix** extracts the hot fix files to a temporary folder and removes the files once the installation is complete.
 - **Extract and Install the SalesLogix Hot Fix** extracts the hot fix files to a location you specify. The files are not removed once the installation is complete. If you choose this option, select a location where you want to store the hot fix files.
5. Click **Next**.
6. On the **Welcome** screen, click **Install**.
7. On the **Completed** screen, click **Finish**.

Remote Office - Scenario 2

Use the following steps to upgrade your Remote Office computers if you did not install the Intellisync portal during the Remote Office installation, and deployed the portal to the Remote Office using Application Architect.

To upgrade you must install the bundle using the Application Architect on the host database. Then, build and deploy the SalesLogix Intellisync Portal.

To install the hot fix bundle

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. On the Application Architect computer, use the hot fix patch to extract the bundle.
 - a. Extract the contents of the **SLX_v751_HF3.zip** file to a temporary folder.
 - b. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
 - c. Select **Extract and Install the SalesLogix Hot Fix**.
The hot fix files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete.
 - d. Click **Next**.
 - e. On the **Welcome** screen, click **Cancel**.
3. Navigate to the folder where you extracted the hot fix bundle (step 2.c.) and copy the **Sage SalesLogix v7.5.1 HF3 VFS Upgrade.zip** bundle to a temporary folder (path name 57 characters or less) on the local machine.

Note There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).

4. Ensure you have **Write** permissions to the bundle installation folder.
Check permissions on the Security tab in the folder properties.
5. Open the **Application Architect**.
6. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
7. Browse to the **Sage SalesLogix v7.5.1 HF3 VFS Upgrade.zip** bundle, and then click **Open**.
8. On the **Select Bundle** screen, click **Next**.
9. On the **Select Items** screen, ensure the **Portals** option is selected.
10. Click **Next**, and then click **Finish**.

To build and deploy the Web site

1. In the **Project Explorer**, select the project.
2. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**.
All the files in the entire assembly for the current project are compiled. Status for the build is displayed in the Output Window at the bottom of the screen.
3. On the **View** menu, click **Deployment Explorer**.
4. Double-click **Deployments**.
5. In the Deployments tree view, right-click the deployment with the Sage SalesLogix Intellisync portal (SLXIntellisync), and then click **Deploy**.
6. Instruct the Remote Office to run a synchronization cycle to update the server with the registered Web site.

Web Host and Disconnected Web Clients

Use the following instructions to upgrade your Web Host and disconnected Web Clients. To upgrade you must install the bundle using the Application Architect on the host database. Then, build and deploy the SalesLogix Intellisync Portal.

To install the hot fix bundle

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. On the Application Architect computer, use the hot fix patch to extract the bundle.
 - a. Extract the contents of the **SLX_v751_HF3.zip** file to a temporary folder.
 - b. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF3.exe**.
 - c. Select **Extract and Install the SalesLogix Hot Fix**.
The hot fix files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete.
 - d. Click **Next**.
 - e. On the **Welcome** screen, click **Cancel**.
3. Navigate to the folder where you extracted the hot fix bundle (step 2.c.) and copy the **Sage SalesLogix v7.5.1 HF3 VFS Upgrade.zip** bundle to a temporary folder (path name 57 characters or less) on the local machine.

Note There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).

4. Ensure you have **Write** permissions to the bundle installation folder.
Check permissions on the Security tab in the folder properties.
5. Open the **Application Architect**.
6. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
7. Browse to the **Sage SalesLogix v7.5.1 HF3 VFS Upgrade.zip** bundle you copied to the local machine, and then click **Open**.
8. On the **Select Bundle** screen, click **Next**.
9. On the **Select Items** screen, ensure the **Portals** option is selected.
10. Click **Next**, and then click **Finish**.

To build and deploy the Web site

1. In the **Project Explorer**, click a project.
2. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**.
All the files in the entire assembly for the current project are compiled. Status for the build is displayed in the Output Window at the bottom of the Application Architect.
3. On the **View** menu, click **Deployment Explorer**.
4. Double-click **Deployments**.
5. In the Deployments tree view, right-click the deployment with the Sage SalesLogix Intellisync portal (SLXIntellisync), and then click **Deploy**.
6. Instruct the Remote user to run a synchronization cycle to update the server with the registered Web site.

Synchronizing the Intellisync Client

After upgrading each computer, open Intellisync and run a synchronization cycle.

When applying Hot Fix 3, the synchronization database still exists and you can synchronize normally. However, if you uninstalled and reinstalled using Add/Remove Programs, the synchronization database does not exist and you must use the **Re-Sync** option. To run a Re-Sync, you must enable confirmations and then Re-Sync.

Note Use the following steps only if you need to run a Re-Sync.

To enable confirmations

1. Open Intellisync for Sage SalesLogix.
2. Click **Setup**.
3. On the **Connection Settings** screen, click **Application Setup**.
4. Select **Appointments**, and then click **Settings**.
5. Click **Advanced**.
6. Click the **Appointments** tab.
 - a. In the **Option** drop-down list, select **Confirmations**.
 - b. Verify the **Confirm changes and additions (Recommended)** option is selected.
 - c. Click **OK**.
7. Click **OK** again.
8. Repeat steps 4 through 7 for **Contacts** and **ToDo's**.
9. Close the **Setup** dialog box.
10. On the **Connection Settings** screen, click **OK**.

To re-sync

1. With Intellisync open, click **Sync Now**.
2. On the **Confirm Edits** screen, click **Re-Sync**.

