Applying Hot Fix 6 for Sage SalesLogix Version 7.5.1

Version 7.5.1.6

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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Technical Support

Technical Support is available to customers with support contracts directly from Sage Software and to Certified Business Partners. Calls are answered during business hours, Monday through Friday, excluding holidays. Current contact information is available on the Sage SalesLogix Web site. Customers with a valid technical support contract and a Web access code can request technical support electronically on the Sage SalesLogix SupportOnline/Sage Software Online Support and Services Web site.

Sage SalesLogix Web site www.saleslogix.com
Sage SalesLogix SupportOnline/Sage Software Online Support and Services Web site http://www.sagesoftwareonline.com

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Applying Hot Fix 6 for Sage SalesLogix Version 7.5.1

This hot fix addresses the following issues:

Defect	Description
1-67868	Web: Allow a configuration item in the Web.config to apply the where SQL clause to the lookup in Customer Portal. This defect originally fixed in 7.5.1 HF 1.
1-68079	Application Architect: After applying Service Pack 1 and building the Web platform, the following error appears: "The name '_Owner' does not exist in the current context." This defect originally fixed in 7.5.1 Hot Fix 5.
1-68080	Application Architect: An error occurs when creating a new relationship, “An application exception has occurred. Value cannot be null. Parameter name: key (mscorlib).” This defect originally fixed in 7.5.1 Hot Fix 5.
1-68082	Application Architect: Sort order cannot be set via datagrid.Sort() method. This defect originally fixed in 7.5.1 Hot Fix 5.
1-68144	Web: The following error displays when more than one literal is used in a group: No value given for one or more required parameters.
1-68175	Application Architect: An error occurs when a form is created with no hidden controls and then hidden controls are added, “ControlId is already in use by another control.” This defect originally fixed in 7.5.1 Hot Fix 5.
1-68208	Web: An error occurs when Field Level Security is enabled on the address entity, "Could not initialize proxy - no Session." This defect originally fixed in 7.5.1. Hot Fix 5.
1-68441	Web: The Date lookup in Customer Portal tickets returns an error.
1-68451	Adding the PICKLIST.Text field to a group layout in the Web Client returns incorrect results.
1-68475	Using an apostrophe in the Query Builder corrupts Web and Network groups.
1-68477	Web: Table Display Name change is not reflected in Query Builder.
1-68766	Web: When the Est. Close date is set to the end of the month, and the month has 30 days in it, it defaults to the 29th day.
1-68769	After changing an Opportunity entity event, an error occurs when saving changes to an Opportunity: “Index Out of Range.”
1-68770	Web: In the summary or list view, the Est. Close date is one day prior to the date on the detail page of that opportunity.
1-68922	Web: Excessive querying for user role assignments in the Disconnected Web Client.
1-68924	Web: Filters are not being cleared from custom groups.
1-68925	Web: Client does not add parentheses to SQL statements in Query Builder.
1-68951	Web: Unrecognized Format error occurs when exporting a group to a file while using Office 2003, and records are placed in a single column.
1-68954	Web: Phone number disappears after switching from detail pane to summary and then back to detail pane.

Defect	Description
1-68959	The default value for a newly created pick list does not save to the database unless it is selected.
1-69022	Web: Loss of filter functionality from previous version.
1-69023	Web: Account Group List filter doesn’t apply to Detail View correctly.
1-69027	Blocks of commented code in business rules and code snippets are unexpectedly deleted.
1-69068	Web: An error occurs when adding targets to campaigns: "Exception has been thrown by the target of an invocation: Object reference not set to an instance of an object."
1-69069	Code snippet loss occurs when a red "Build Error" line is double-clicked to jump to the problem code and edit the snippet.
1-69076	An error occurs after making changes to custom groups with custom fields.
1-69077	Web: Groups with conditions based on History display only one record per Account.
1-69181	Web: GetGroupDataReader failed with an error when performing a lookup: “Invalid column name ‘ACCOUNT_UC’.”
1-69232	Web: When switching between Detail and Summary views, data disappears and a refresh is necessary to display it again.
1-69243	Unhandled exception occurs when navigating from List view to Detail view.
1-69349	Web: CPU and memory usage increase drastically when opening and closing a DialogWorkSpace quick form or smart part from an INSERT screen multiple times.
1-69463	Web: Incorrect filter behavior when columns are removed in a group layout.
1-69470	Quick form controls are populated before load actions are executed, which results in customized picklist failure based on user regions.
1-69564	Web: There is no prompt to save, when the user navigates to another record, after changes to the address field on the Contacts/Accounts/Leads mainview.
1-69772	An error occurs when a Lead with an Activity containing Notes larger than 255 characters is converted to a Contact.

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_HF6.zip	SLX_v751_HF6.exe, Sage SalesLogix v7.5.1 HF6 VFS Upgrade.zip
SLX_v751_HF6.exe	GroupTranslator.dll, SageAppArchitect.exe, Sage.Platform.dll, Sage.Platform.AdminModule.dll, Sage.Platform.QuickForms.WebFormGen.dll, Sage.SalesLogix.Security.dll, Sage.SalesLogix.QuickForms.QFControls.dll, Sage.SalesLogix.Web.Controls.dll, Sage.SalesLogix.Web.dll

File Name	File Contents
Sage SalesLogix v7.5.1 HF6 VFS Upgrade.zip	ActivitySummaryList.main.quickform.xml, ActivitySummaryList.main.quickform.xml.resx, ActivityViewer.ascx, AddressList.ascx.cs, CommonTasksTasklet.ascx, CommonTasksTasklet.ascx.cs, CommonTasksTasklet.ascx.resx, CommonTasksTasklet.js, exportgroup.aspx, Filters.ascx, Filters.ascx.cs, Filters.css, general.js, GroupListTasklet.js,GroupTranslator.dll, InsertOpportunity.main.quickform.xml, InsertOpportunity.main.quickform.xml.resx, Interop.GroupTranslator.dll, ManageTargets.ascx.cs, OpportunitySummary.main.quickform.xml, OpportunitySummary.main.quickform.xml.resx Sage.Platform.dll, Sage.SalesLogix.BusinessRules.dll, Sage.SalesLogix.Client.GroupBuilder.dll, Sage.SalesLogix.Security.dll, Sage.SalesLogix.Web.dll, Sage.SalesLogix.Web.Controls.dll

Applying the Hot Fix

Apply the hot fix to all computers where the Application Architect, Web Host, and/or disconnected Web Clients are installed. Alternatively, you can manually apply the GroupTranslator.dll to the disconnected Web Client computers.

Install the bundle using the Application Architect, and then build and deploy your Web site(s).

This hot fix affects the Customer Portal, SLXClient, Intellisync, SData, Lead Capture, Web Reporting, Process Host portals. All affected portals should be redeployed.

Note Before installing the bundle, review the files included in the hot fix. Back up any customized files that may be affected, or back up the whole project if there are many files. Then apply the hot fix bundle in one of the following ways:

- Manually merge the hot fix items with the customized items.
- Apply the bundle (overwriting all existing items), and then manually merge the customized items.

If you want to use the feature added for defect 1-67868, you can modify the Web.config file to implement the change. See "Editing the Web.config File" on page 4.

If you want to use the feature added for defect 1-69022, see the section "Creating Filters" on page 5.

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_HF6.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_HF6.exe**.
4. On the **SalesLogix - v7.5.1 Hot Fix 6** screen, select the **Extract and Install the SalesLogix Hot Fix** option.

   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.

Note Selecting the other option will prevent the VFS bundle from being available after the patch is installed, since the files are then deleted.

5. Select the location where you want to store the hot fix files.

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).

6. Click **Next**.
7. On the **Welcome** screen, click **Install**, to install the patch.
8. On the **Completed** screen, click **Finish**.

To manually apply the GroupTanslator.dll to disconnected Web Clients

1. Close all Sage SalesLogix applications on the disconnected Web Client computer.
2. Stop the Personal Web Server.
   - Right-click the icon in the Windows system tray, and then click **Exit**.
3. On a computer where 7.5.1 HF 6 has already been applied, navigate to \Program Files\SalesLogix and locate the file **GroupTanslator.dll**.
4. Copy **GroupTanslator.dll**, and then paste it to the corresponding directory on the disconnected Web Client computer.
5. Register the file:
   a. Click **Start**, and then click **Run**.
   b. Type **regsvr32 "[Drive:]\Program Files\SalesLogix\GroupTranslator.dll"**.
      - Replace [Drive:] with the drive where the SalesLogix directory is located on the disconnected Web Client computer.
   c. Click **OK** to run the registration.
   d. Click **OK** again.
6. Restart the Personal Web Server.
7. Reset IIS.

To install the bundle

1. Ensure you have **Write** permissions to the bundle installation folder.

   Check permisisons on the Security tab on the folder properties.
2. Open the **Application Architect**.
3. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
4. Navigate to the folder where you extracted the hot fix files, click **Sage SalesLogix v7.5.1 HF6 VFS Upgrade.zip**, and then click **Open**.
5. On the **Select Bundle** screen, click **Next**.
6. On the **Select Items** screen, ensure the **Portals** option is selected.
7. Click **Next**, and then click **Finish**.

To build and deploy the Web site

1. In the **Project Explorer**, click 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.

1. On the **View** menu, click **Deployment Explorer**.
2. Expand **Deployments**.
3. Double-click the portal to deploy.
4. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.

   A status box appears indicating status for the deployment.

Editing the Web.config File

If you want to add the ability to use a SQL WHERE clause in a Customer Portal lookup, edit the Web.config file using the following instructions.

Note These steps are optional. Editing the Web.config file is only required if you want to implement the fix for Customer Portal.

To edit

1. Browse to the Web.config file for the Customer Portal.

   The default path is C:\Inetpub\wwwroot\SLXCustomerPortal.
2. Open the file in an editor.
3. Locate the **<appSettings>** section at the bottom of the script.
4. Insert a new line after **<add key="LookupControlMaxResults" value="500"/>**

   For example, use the following statement to limit the search results to tickets received after 3/1/2007.

```
<appSettings>
  <add key="LookupControlMaxResults" value="500"/>
  <add key="CustomerPortalLookupConditions_TICKET" value="RECEIVEDDATE &gt; '03/01/2007
   1:00:00 AM'"/>
```

5. Save the changes and close the file.

Note Multiple clauses are permissible in the same parameter. XML encoding must be used for filtering. The expression (<>) should be written as (<>). For example:

```
<add key="CustomerPortalLookupConditions_TICKET" value="status = 'Open' and
PUBLICACCESSCODE &lt;&gt; 'k6UJ9A0000OW' "/>
```

Creating Filters

There are two limitations when creating filters:

Limitation	Description
We have to change the xml to filter on the display text instead of the picklist value stored in the history type.	You can only select entities with relationships. You can not create a relationship to the picklist table since it is not an entity. To use the picklist values in the history type you must add a relationship to the history table. To display names for history types instead of ID numbers you must edit the filter xml directly. To do this: create a filter for Histories.Type and then change the Histories.Type in the xml to Picklist.Text. If the group has a join to picklist.text, that content will display.
We cannot filter on two fields with the same name in the group layout.	We can not filter if there are multiple fields in the group with the same filter name. For example, we can filter on account.type and history.type, if you filter on picklist values, because history.type is actually filtering on picklist.text. If you try to filter on account.type and history.type on the same group there is likely to be a conflict. If you remove the column you aren't filtering on from the group it should work fine.

The following examples describe how to create a 1:M relationship filter where history types display names.

To create a 1:M Child relationship between Account and History, named Histories

1. In Application Architect, open the **Project Explorer**.
2. Expand your project.
3. In Application Architect, expand **Entity Model**, then **Packages**, and then **SalesLogix Application Entities**.
4. Expand **Account,** and right-click **Child Properties**.
5. Click **New Relationship**.
6. Select the **History** table from the **Child Entity** drop-down, and make it a 1:M relationship.
7. Click **OK**.
8. On the toolbar, click **Save**.
9. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**.

To create Account filter on Histories.Type

1. In Application Architect, open the **Project Explorer**.
2. Expand your project.
3. Expand **Entity Model**, then **Packages**, and then **SalesLogix Application Entities**.
4. Expand **Account,** and right-click **Filters**.
5. Click **New Filter**.
6. Type **HistoryType** in the Filter Name field.
7. Type **HistoryType** in the Display Name field.
8. Type **Histories.Type** in the Property field.
9. Type **Distinct** in the Type field.
10. Click **Save**.

To edit the filter xml file

1. In Application Architect, on the **View** menu, click **Virtual File System Explorer**.
2. in the tree view, expand **Virtual File System Explorer**.
3. Expand **Model**, then **Entity Model**, then **SalesLogix Application Entities**.
4. Expand **Account**.
5. Right-click **Historiestype.filter.xml**.
6. Click **Open**.
7. Change the propertyName **Picklist.Text** from **Histories.Type**.
8. On the toolbar, click **Save**.
9. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**.
10. On the **View** menu, click **Deployment Explorer**.
11. Expand **Deployments**.
12. Double-click the portal to deploy.
13. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.

    The portal will open in your browser.
14. Type your log in credentials.
15. In the Sage SalesLogix Web Client, add a new **Account** group.

    Add a local join in the **Query builder** from **history.type** to **picklist.id**.
16. Add the **picklist.text** to the group layout.

    The HistoryType filter now displays text values.

    Note: The Account folder in the root directory also reflects a propertyName of Picklist.Text. The path for the root directory is C:\Inetpub\wwwroot\SlxClient\Filters.