Applying Hot Fix Web Rollup 01 for Sage SalesLogix Version 7.5.1

Version 7.5.1.01 Web Rollup

Developed by Sage SalesLogix User Assistance

Applying Hot Fix Web Roll Up 01 for Sage SalesLogix Version 7.5.1

Contents

Chapter 1
Understanding and Applying the Hot Fix

Defect Information

This hot fix addresses the following issues:

Defect	Description
1-67868	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 Hot Fix 1 and Hot Fix 6.
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 and Hot Fix 6.
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 and Hot Fix 6.
1-68082	Application Architect: Sort order cannot be set via datagrid.Sort() method. This defect originally fixed in 7.5.1 Hot Fix 5 and Hot Fix 6.
1-68144	An error occurs when more than one literal is used in a group: "No value given for one or more required parameters". This defect originally fixed in 7.5.1 Hot Fix 6.
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 and Hot Fix 6.
1-68208	An error occurs when FLS is enabled on the address entity, "Could not initialize proxy - no Session." This defect originally fixed in 7.5.1 Hot Fix 5 and Hot Fix 6.
1-68409	If a client is deployed to a virtual and physical directory other than SLXClient, then Mail Merge and SendSLX return errors. This defect originally fixed in 7.5.1 Hot Fix 9.
1-68441	The Date lookup in Customer Portal tickets returns an error. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68451	Adding the PICKLIST.Text field to a group layout in the Web Client returns incorrect results. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68475	Using an apostrophe in the Query Builder corrupts Web and Network groups. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68479	New columns added in group layout are not exported to Excel. This defect originally fixed in 7.5.1 Hot Fix 30.
1-68517	Application Architect unexpectedly exits with an application exception when editing a complex form. This defect originally fixed in 7.5.1 Hot Fix 11.
1-68611	Add Unicode support in the Application Architect. This defect originally fixed in 7.5.1 Hot Fix 14.
1-68766	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. This defect originally fixed in 7.5.1 Hot Fix 6.

Defect	Description
1-68769	After changing an Opportunity entity event, an error occurs when saving changes to an Opportunity: "Index Out of Range." This defect originally fixed in 7.5.1 Hot Fix 6.
1-68770	In the summary or list view, the Est. Close date is one day prior to the date on the detail page of that opportunity. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68922	Excessive querying for user role assignments in the Disconnected Web Client. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68924	Filters are not being cleared from custom groups. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68925	Client does not add parentheses to SQL statements in Query Builder. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68951	Unrecognized Format error occurs when exporting a group to a file while using Office 2003, and records are placed in a single column. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68952	An error occurs in the Literature Request dialog box on localized client (Russian). This defect originally fixed in 7.5.1 Hot Fix 16.
1-68954	Phone number disappears after switching from detail pane to summary and then back to detail pane. This defect originally fixed in 7.5.1 Hot Fix 6.
1-68959	The default value for a newly created pick list does not save to the database unless it is selected. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69005	A very full calendar is slow to respond to the first click. This defect originally fixed in 7.5.1 Hot Fix 19.
1-69022	Loss of filter functionality from previous version. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69023	Account Group List filter does not apply to Detail View correctly. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69027	Blocks of commented code in business rules and code snippets are unexpectedly deleted. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69068	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." This defect originally fixed in 7.5.1 Hot Fix 6.
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. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69076	An error occurs after making changes to custom groups with custom fields. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69077	Groups with conditions based on History display only one record per Account. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69078	SpeedSearch error occurs on lead conversion where insufficient resources exist. This defect originally fixed in 7.5.1 Hot Fix 22.
1-69163	Users are logged out of the Web client randomly. This defect originally fixed in 7.5.1 Hot Fix 23.
1-69181	GetGroupDataReader failed with an error when performing a lookup: "Invalid column name 'ACCOUNT_UC'." This defect originally fixed in 7.5.1 Hot Fix 6.

Defect	Description
1-69196	After concurrent users log off, another user is not able to log into the Web client for 2 minutes. This defect originally fixed in 7.5.1 Hot Fix 23.
1-69232	When switching between Detail and Summary views, data disappears and a refresh is necessary to display it again. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69243	Unhandled exception occurs when navigating from List view to Detail view. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69273	Export to Excel does not use the selected group name. This defect originally fixed in 7.5.1 Hot Fix 9.
1-69274	The default extension for Export to Excel file is .xlt (should be .xls). This defect originally fixed in 7.5.1 Hot Fix 9.
1-69349	CPU and memory usage increase drastically when opening and closing a DialogWorkSpace quick form or smart part from an INSERT screen multiple times. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69366	A code snippet is not retained after editing Load Actions on a form in the Application Architect. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69442	When a new tab is selected, the filters count in the task pane is not updated until a refresh is performed. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69443	The filters check box status is not updated until after a refresh is performed. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69463	Incorrect filter behavior when columns are removed in a group layout. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69470	Quick form controls are populated before load actions are executed, which results in customized pick list failure based on user regions. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69562	Lookups containing apostrophes are ignored and a search returns all records. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69564	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. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69565	Random SLXOLEDB Exception errors appearing in the Event logs are causing perceived performance issues. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69596	If a pick list value from a pick list contains a comma, the pick list only shows the value before the comma. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69772	An error occurs when a Lead with an Activity containing Notes larger than 255 characters is converted to a Contact. This defect originally fixed in 7.5.1 Hot Fix 6.
1-69817	The last entry is highlighted in all picklist drop-down lists.
1-69819	When scheduling an activity as a user with access to a large number of other user's calendars, the Web client takes 20+ seconds to load the refreshed Activity window. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69827	Some strings are not localised on the Add Opportunity Product dialog box. This defect originally fixed in 7.5.1 Hot Fix 24.
1-69828	The Complete Activity Cancel button is not translating. This defect originally fixed in 7.5.1 Hot Fix 29.

Defect	Description
1-69965	Edit Activity pop-up windows in the web client pegs CPU at 100% when opened from the activity tab in the account or contact detail view. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70134	Using Query Builder, a date field cannot be formatted in the Layout when selecting "Entity Linked." This defect originally fixed in 7.5.1 Hot Fix 28.
1-70157	Mail merge takes four minutes to load on Web server with 64-bit OS. This defect originally fixed in 7.5.1 Hot Fix 29.
1-70199	Filters do not work as expected when an entity name includes an underscore. This defect originally fixed in 7.5.1 Hot Fix 29.
1-70201	If fields have underscores in the field name, filters do not work. This defect originally fixed in 7.5.1 Hot Fix 29.
1-70274	Filters return an error when selected against any group with a very large number of records. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70314	Mail Merge slows down when the database contains a large number of groups. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70322	Application Architect: Error occurs when trying to save and close a form after a build: "There was an error generating the XML document. (System.Xml)." This defect originally fixed in 7.5.1 Hot Fix 36.
1-70378	Users kicked out randomly with an "Out of Memory" error. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70436	Error occurs when filter name is clicked: "A script on this page is causing Internet Explorer to run slowly." This defect originally fixed in 7.5.1 Hot Fix 30.
1-70437	Error occurs when changing between groups and filters. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70483	City filter for Leads does not work. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70514	Words appear to overlap, or become unreadable, in the Confirmation filter. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70535	Application Architect: After applying HF30 bundle, items are listed in manifest as being invalid. This defect originally fixed in 7.5.1 Hot Fix 36.
1-70630	Port back HQL Data Source code in support of Notes/Activities/History performance fix. This defect originally fixed in 7.5.1 Hot Fix 34.
1-70632	Web: Changing the Adjusted Price for a Product does not change the Discount. This defect originally fixed in 7.5.1 Hot Fix 36.
1-70662	Entities based on table names with an underscore break filter functionality. This defect originally fixed in 7.5.1 Hot Fix 30.
1-70887	Web Viewer users cannot add, edit, or complete Notes. This defect originally fixed in 7.5.1 Hot Fix 32.
1-70919	Application Architect: Code snippets have the GUID appended to the method if Application Architect is closed while the editor is open. This defect originally fixed in 7.5.1 Hot Fix 36.
1-71007	When editing an Activity and Entering notes longer than 255 Characters, the Notes are being truncated if user "posts" to the server before saving. This defect originally fixed in 7.5.1 Hot Fix 37.
1-71046	Application Architect: Do not remove code snippet orphans; create tool to identify possible orphans. This defect originally fixed in 7.5.1 Hot Fix 36.

Defect	Description
1-71073	FileConfigurationSource holds on to an instance of HttpContext when it is created (once per session) and will hold onto it until the user's session ends. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71080	NHibernate: QueryPlanCache is not caching properly. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71086	Improve Group XML Caching to use less memory. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71097	Add logic to free old PageWorkItem state from the asp.net session. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71108	When a group is selected, it is quering the fields in the group layout. It should query the IDs. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71152	Export to File memory optimization. This defect originally fixed in 7.5.1 Hot Fix 38.
1-71180	An error occurs when updating multiple Opportunities in which at least one has a NULL value in the Sales Potential or Probability. This defect originally fixed in 7.5.1 Hot Fix 39.
1-71251	Address tab performs an unconstrained query. This defect originally fixed in 7.5.1 Hot Fix 34.
1-71339	Mail merge not processing the request URL properly under a particular scenario. This defect originally fixed in 7.5.1 Hot Fix 40.
1-71360	Opportunities closed in the Web Client have a different timestamp than the Sage SalesLogix Client. This defect originally fixed in 7.5.1 Hot Fix 36.
1-71493	Numeric control of format type 'percent' equates a value of 1 to 100% instead of the expected 1%. This defect originally fixed in 7.5.1 Hot Fix 28.
1-71702	Application Architect: Numeric control of format type ''Decimal'' not working as expected in quick forms. This defect originally fixed in 7.5.1 Hot Fix 28.
1-71841	An error occurs when using Export to Excel under HTTPS. This defect originally fixed in 7.5.1 Hot Fix 42.
1-71943	Application Architect: Items are listed in manifest as being invalid, after applying a VFS bundle. This defect originally fixed in 7.5.1 Hot Fix 21.
1-71992	Page resources are held in session state after request is completed. This defect originally fixed in 7.5.1 Hot Fix 43.
1-71993	NHibernate should keep a strong reference to 128 entries, but currently keeps a strong reference to every entry, in addition to the weak reference. This defect originally fixed in 7.5.1 Hot Fix 43.
1-72401	Unsaved data prompt disappears with fields from extension tables. This defect originally fixed in 7.5.1 Hot Fix 46.
1-72492	Localized Web host caches translated filter names when first accessed, forcing a reset of IIS for subsequent users to see their language. This defect originally fixed in 7.5.1 Hot Fix 47.
1-72540	Removing a project with a working directory on the root drive deletes all files on the drive. This defect originally fixed in 7.5.1 Hot Fix 51.
1-72710	A problem occurs with the RadUpload Control when trying to schedule a meeting.
1-72711	Contact group sorts by last name only; does not include first name.

Defect	Description
1-72712	An error occurs after editing the group layout and then sharing the group.
1-72714	The entity name in Query Builder does not reflect new display name.
1-72715	In Query Builder, using "IN" operator against the Accountmanagerid field returns no results.
1-72716	An error occurs when the Convert Lead dialog is cancelled, then reopened.
1-72717	When two fields of the same name exist in a group layout, filters display data from the field displayed first in the layout.

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_Web_Rollup01.zip	SLX_v751_Web_Rollup01.exe
SLX_v751_Web_Rollup01.exe	FindOrphans.exe, FindOrphans.exe.config, GroupTranslator.dll, SageAppArchitect.exe, Sage.Platform.dll, Sage.Platform.AdminModule.dll, Sage.Platform.Orm.Codegen.dll, Sage.Platform.QuickForms.dll, Sage.Platform.QuickForms.WebFormGen.dll, Sage.Platform.WebPortal.dll, Sage.Platform.WebPortalDesign.dll, Sage.Saleslogix.Activity.dll, Sage.SalesLogix.Security.dll, Sage.SalesLogix.QuickForms.QFControls.dll, Sage.SalesLogix.Web.dll, Sage.SalesLogix.Web.Controls.dll, Sage.Platform.WebPortal.Design.dll, Sage SalesLogix v7.5.1 Web Rollup 01 VFS Upgrade.zip
Sage SalesLogix v7.5.1 Web Rollup 01 VFS Upgrade.zip	ActivityContactSummary.main.quickform.xml, ActivityContactSummary.main.quickform.xml.resx, ActivityDetails.ascx.cs, ActivityFilters.ascx.cs, ActivityList.ascx, ActivityList.ascx.cs, ActivityReminders.ascx.cs, ActivitySummaryList.main.quickform.xml, ActivitySummaryList.main.quickform.xml.resx, ActivityViewer.ascx, AddContactorLeadNote.main.quickform.xml, AddContactorLeadNote.main.quickform.xml.resx, AddOpportunityProduct.ascx, AddOpportunityProduct.ascx.resx, AddressList.ascx, Addresslist.ascx.cs, AttachmentList.ascx, AttachmentList_ClientScript.js, Base.Master, cmdOK_OnClick.method.xml, CommonTasksTasklet.ascx, CommonTasksTasklet.ascx.cs, CommonTasksTasklet.ascx.resx, CommonTasksTasklet.js, CompleteActivity.ascx.cs, Default-Mapping-SalesLogix.Mapping.codetemplate.xml, EmailPromptForHistory.aspx.cs, EntityResources.resx, exportgroup.aspx, Filters.ascx, Filters.ascx.cs, Filters.css, general.js, global.cs, groupmanager.js, GroupListTasklet.js, HistoryDetails.main.quickform.xml, HistoryDetails.main.quickform.xml.resx, HistoryList.ascx, HistoryList.ascx.cs, ig_shared.js, InsertOpportunity.main.quickform.xml, InsertOpportunity.main.quickform.xml.resx, Interop.GroupTranslator.dll, LeadHistoryDetails.main.quickform.xml, LeadHistoryDetails.main.quickform.xml.resx, LiteratureRequest.ascx.cs, LiteratureRequest.ascx.resx, MailMerge.js, MailMerge.vbs, ManageTargets.ascx.cs, MathOptions.ascx.cs, NHibernate.dll, NotesList.ascx, NotesList.ascx.cs,

File Name	File Contents
	OpportunityClosedLost.main.quickform.xml, OpportunityClosedLost.main.quickform.xml.resx, OpportunityClosedWon.main.quickform.xml, OpportunityClosedWon.main.quickform.xml.resx, OpportunitySummary.main.quickform.xml, OpportunitySummary.main.quickform.xml.resx, Sage.Platform.dll, Sage.Platform.Application.UI.Web.dll, Sage.Platform.Configuration.dll, Sage.Platform.Orm.CodeGen.dll, Sage.Platform.Quickforms.Designer.dll, Sage.Platform.WebPortal.dll, Sage.Saleslogix.Activity.dll, Sage.SalesLogix.BundleModel.BundleActions.dll, Sage.SalesLogix.BusinessRules.dll, Sage.SalesLogix.Client.GroupBuilder.dll, Sage.SalesLogix.Client.GroupBuilder.xml, Sage.SalesLogix.Client.MailMerge.dll, Sage.SalesLogix.Client.MailMerge.xml, Sage.SalesLogix.Security.dll, Sage.SalesLogix.Services.PotentialMatch.dll, Sage.SalesLogix.Services.SpeedSearch.dll, Sage.SalesLogix.Web.dll, Sage.SalesLogix.Web.Controls.dll, Sage.SnippetLibrary.CSharp.@.d2a94516-6765-424d-9f9f-ab33dd248197.codesnippet.cs, SelectContactId.aspx.cs, SelectLeadId.aspx.cs, SlxBase.css, UserCalendar.USERCALENDAR.entity.xml, UserCalendar.User.3bdab581ceba463aa79beca6fd95e12c.relationship.xml, UpdateOpportunities.ascx.cs

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, edit the *.Master files if necessary, and then build and deploy your Web site(s).

Note   Before installing the bundle, review the files included in the hot fix. Back up any customized files that may be affected, or backup 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.

When merging the Base.Master and/or Dashboard.Master files in the SLXClient Portal, do not overwrite the version number of the SLXActiveMail.cab in your files with the version included in this hot fix. The -1,-1,-1,-1 causes the SLXActiveMail.cab to download. For example:

```
const string ObjectScript = @"<object id='SEN'
codebase='SLXActiveMail.cab#version=-1,-1,-1,-1' height='0' width='0'
classid='clsid:A2CBD67A-F77D-45DF-9621-5F563DAE18FF'></object>
```

If this happens, you must update the *.Master files with the version number of the SLXActiveMail.cab in your implementation. See "Editing the *.Master files" on page 9 for details.

There are several defect specific configurations that must be made to implement the changes made in this hot fix. See Chapter 2, "Using Defect Specific Changes" on page 13.

To apply the patch

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_Web_Rollup01.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v751_Web_Rollup01.exe**.
4. On the **SalesLogix - v7.5.1 Hot Fix 01** 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.

Editing the *.Master files

If the version number for SLXActiveMail.cab is overwritten in the Base.Master and Dashboard.Master files with the version included in this hot fix, SLXActiveMail.cab is forced to download each time it runs. You must manually edit the files to prevent this from happening. To do this, locate the version for your implementation in the EmailNotifier.dll and then use that information to edit the Base.Master and Dashboard.Master files.

Note   You must edit the *.Master files in the project model. When you build and deploy, the modified files are copied to the portal.

To find the version number

1. Navigate to the base directory of the portal.
   The default path is \Inetpub\wwwroot.
2. Double-click the folder for the portal. For example, **SLXClient**.
3. Find and copy the **SLXActiveMail.cab** to a temporary folder.
4. Decompress the **SLXActiveMail.cab** in the temporary folder.
5. Right-click on **EmailNotifier.dll** and click **Properties**.
6. Click the **Version** tab and note the version number, e.g. 7.5.1.1775.
7. Delete the temporary folder and its contents.

To edit the *.Master files

1. In the **Project Explorer**, expand your project folder, and then double-click **Portal Manager**.
2. Expand **Sage SalesLogix**, expand **Support Files**, and then expand **Masters**.
3. Locate and double-click **Base.Master** to open it for editing.
4. Find the section with the SLXActiveMail.cab version and edit it to match what you found in the EmailNotifier.dll.

   For example:

   ```
   const string ObjectScript = @"<object id='SEN'
   codebase='SLXActiveMail.cab#version=-7,5,1,1775' height='0' width='0'
   classid='clsid:A2CBD67A-F77D-45DF-9621-5F563DAE18FF'></object>.
   ```

Note   Ensure you use commas within the version number, not periods.

5. On the toolbar, click **Save** and then close the file.
6. Repeat steps 3-5 for **Dashboard.Master**.

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 Web Rollup 01 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(s)

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.

5. Repeat these steps for each of the affected portals.

   By default, the Sage SalesLogix Web Client portal is set to deploy to the localhost, but you can change these settings to fit your environment.

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

To use or implement changes for specific defects:

- 1-67868 - To modify the Web.config file to implement the change, see "Editing the Web.config File" on page 13.
- 1-68611 - For details on enabling and configuring Unicode properly, see "Configuring Unicode for the Entity Model" on page 14.
- 1-69022 - To use the feature added for this defect, see the section "Creating Filters" on page 14.
- 1-69078 - To address this defect, see "Changing the Max Search Results Value" on page 16.
- 1-70630 - To take advantage of the HQL Data Source code, see "Using HQL Data Source Code" on page 17.
- 1-71007 - For information on changes to customizations, see "Updating Customizations with Notes/LongNotes" on page 18.
- 1-71046 - To use the feature added for this defect, see "Using the FindOrphan.exe utility" on page 19.

Editing the Web.config File

To add the ability to use a SQL WHERE clause in a Customer Portal lookup, edit the Web.config file using the following instructions. This change addresses defect 1-67868.

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' "/>
```

Configuring Unicode for the Entity Model

In order to use Unicode in the entity model, a UnicodeSupport.xml configuration file must exist, with a setting to ensure Unicode is enabled and configured properly. This change addresses defect 1-68611.

To configure

1. After applying the hot fix, open the Application Architect.
   The UnicodeSupport.xml file is automatically generated.

2. Open the UnicodeSupport.xml file in an editor.
   The default path for the location of the file is \Documents and Settings\All Users\Application Data\Sage\Platform\Configuration\Global\UnicodeSupport.xml.

3. Edit the file to set the **EnableUnicodeDataTypesInModel** to **true**.
   For example:

```
<?xml version="1.0"?>
<UnicodeSupportConfiguration xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
 xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <EnableUnicodeDataTypesInModel>true</EnableUnicodeDataTypesInModel>
</UnicodeSupportConfiguration>
```

4. Save and close the file.

Creating Filters

This change addresses defect 1-69022. The best practice for using filters, especially with large numbers of records, is to reduce the number of records to filter. You can do this using distinct and range filters, using a lookup filter, or using combinations of these.

The filters available in the list view vary depending on the type of record you are viewing, and the layout of the current group (the columns in the records).

To use the lookup filter, you must change the filter type in the Application Architect from Distinct or Range, to User Lookup. When you do this, a text box displays in place of the filter options.

For example, say you changed the City filter to a User Lookup, when you expand the City filter, a text box displays instead of a list of cities. Type the specific text you are looking for into the text box and the records are filtered by the text you typed. For example, type Chicago, to filter on all records with the city of Chicago. If necessary, you can use other available filters in combination with the User Lookup.

The following table provides filtering examples using the default distinct filters.

End Result	Filter 1st	Filter 2nd	Filter 3rd
To find all records with city of Chicago	State: Illinois	City: Chicago	
To find all the Active Leads for the Northeast Sales team	Owner: Northeast	Type: Lead	Status: Active
To find all records matching Inactive Partner Resellers	Status: Inactive	Type: Partner	Subtype: Reseller

The following table provides an example using a combination of a default range filter and distinct filters.

End Result	Filter 1st	Filter 2nd	Filter 3rd
To find all opportunities with $100k+ potential in the negotiation stage with an end of year estimated close date.	Potential: 100,000 to 499,999	Stage: Negotiation	Estimated Close: December 2009

Note The filters in your implementation may vary based on customizations.

There are two limitations when creating filters:

Limitation	Description
We have to change the xml to filter on the display text instead of the pick list 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 pick list 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 pick list 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 are not 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.

Changing the Max Search Results Value

To accommodate limited resources and/or systems with a large number of records, you can change the max search results value. This change addresses defect 1-69078.

To change

1. Open the Administrator.
2. On the **Tools** menu, click **Execute SQL**.
3. In the **Execute SQL** dialog box, right-click the blank area and then click **Add**.
4. Type the following SQL statement into the **Edit SQL** dialog box:
   update sysdba.indexgeneral set maximumresults = 'n'

   Where 'n' is the maximum number of results to return. This can be any value. The current default is 1000.

   Note: The value used in this SQL statement appears as the default for Search Results on the General tab in the SpeedSearch Configuration dialog box. We

recommend you not try to change the value on that tab, but execute another SQL statement to change it if necessary.

5. Click **Test**.

6. Click **Yes** to continue with the test.

   - If the test is successful, a message appears summarizing the results of the test.
   - An error appears if there is a problem with the statement. Check the syntax, make any necessary changes, and click Test again.

7. When the test successfully completes, click **OK**.

   The SQL statement appears, with a status of verified, in the list on the Execute SQL dialog box.

8. Select the **Execute statements on the Host Database** option.

9. To execute the statement on remote databases, select the names of the **Remotes Users** from the **Available Remotes** list, and click **>** to add them to the **Selected Remotes** list.

10. Click **Execute**.

11. Click **Yes** to continue.

    A dialog box appears detailing the completed process.

12. Click **OK**.

13. Click **Close**.

Using HQL Data Source Code

You must makes changes to the form, to take advantage of the HQL Data Source code. This addresses defect 1-70630.

To use the HQL Data Source Code

1. In the markup of the form, create or modify an existing gridview control.

   ```
   <SalesLogix:SlxGridView ID="TestGrid" runat="server" AutoGenerateColumns="False"
   EnableViewState="false" CssClass="datagrid" GridLines="None" AllowPaging="true"
   PageSize="10" AllowSorting="true">


   <Columns>


       <asp:BoundField DataField="Name" HeaderText="Name" SortExpression="Name" />
       <asp:BoundField DataField="Birthday" HeaderText="Birthdate" SortExpression="Birthday"
   />
       <asp:BoundField DataField="Phone" HeaderText="Main Phone" SortExpression="Phone" />


   </Columns>
   </SalesLogix:SlxGridView>
   ```

2. In the code-behind for the form, create a read-only public (or protected) property (and corresponding private property) to reference the local WebHqlListBindingSource. In the getter of this property, create the bindingsource object and give it the "select" and "from" portions of the hql to be used in the grid for this form.

   ```
   private WebHqlListBindingSource _hqlBindingSource;

   protected WebHqlListBindingSource HqlBindingSource

   {

       get

       {
   ```

```
            if (_hqlBindingSource == null)

            {

            List<HqlSelectField> select = new List<HqlSelectField>();

            //"Name" is the property on the entity and the alias we used in the first
column of the grid.

            select.Add(new HqlSelectField("c.Name", "Name"));

            select.Add(new HqlSelectField("c.Birthdate", "Birthday"));

            select.Add(new HqlSelectField("c.Phone", "Phone"));

            //create the bindingsource object and pass select and from parts:

            _hqlBindingSource = new WebHqlListBindingSource(select, "Contact c");

        }

        return _hqlBindingSource;

    }

}
```

3. In the OnFormBound method (or PreRender) do the following:
    a. Determine the parameters for the where clause and pass that to the bindingsource.
    b. Provide the name of the grid to which the bindingsource is providing data.
    c. Call DataBind() on the grid.

```
protected override void OnFormBound()
{
    base.OnFormBound();
    string entityId = EntityService.EntityID.ToString();
    // add any other 'where' criteria here…
    HqlBindingSource.Where = string.Format("c.Account.Id = '{0}' and c.Type = 'Customer'
", entityId);
    HqlBindingSource.BoundGrid = TestGrid;
    TestGrid.DataBind();
}
```

Updating Customizations with Notes/LongNotes

In this hot fix, both Notes and LongNotes are exposed as properties. The LongNotes property ensures that the Notes property always contains the first 255 characters of what is set in the LongNotes property.

If you have customizations with text boxes bound to the Notes property, the LongNotes field will not be updated when values in these text boxes are changed. To keep data synchronized in the Notes and LongNotes fields, update your customizations to bind controls to the LongNotes property.

Note   The Notes field should be used in data grids. This makes sorting possible in that column. Use LongNotes for two-way binding (for example, to a text box) and use Notes for one-way/ReadOnly binding (for example, to a data grid column).

Change the following text:

```
    bs.Bindings.Add(new WebEntityBinding("Notes", Notes, "Text"));
```
to this:

```
    bs.Bindings.Add(new WebEntityBinding("LongNotes", Notes, "Text"));
```

If you customized any business rules or other code that assigns values to Notes, update them to assign values to the LongNotes property.

Change the following text:

```
newHistory.Notes = lead.Notes;
```

to this:

```
newHistory.LongNotes = lead.Notes;
```

Using the FindOrphan.exe utility

The Find Orphans utility identifies possible code snippet and business rule method orphans that you may want to delete. This can help resolve issues you may have building the code snippet library, for example, due to duplicate method names.

FindOrphans.exe is installed on the Administrative Workstation in the SalesLogix folder.

To use

1. Open a command window.
2. Type one of the following:

Command Line Syntax	Description

`FindOrphans /P:"VFS:\Model",`
`/CS:"Provider=SLXOLEDB.1;Password="";Persist`
`Security Info=True;User ID=admin;Initial`
`Catalog=SALESLOGIX_TEST;Data`
`Source=localhost;Extended`
`Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFI`
`ND=ON;AUTOINCBATCHSIZE=1;SVRCERT=;""`
	Executable, VFS project path and connection string.

`FindOrphans` `/P:"C:\MyProjects\7.5.1Project\Model"`	Executable and local file system path. The example is a default. Replace it with the drive letter and folder names corresponding to your system.
`FindOrphans`	Displays command line usage information with a description of the parameters.