Applying Service Pack 1 for Sage SalesLogix Version 7.5

Version 7.5.1

Developed by Sage SalesLogix User Assistance

Your business in mind.

Applying Service Pack 1 for Sage SalesLogix Version 7.5

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 (021909)
2009

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

Revisions to this book are posted on the Sage SalesLogix SupportOnline/Sage Software Online Support and Services Web site. Check this site regularly for current Sage SalesLogix product documentation.

Contents

Introduction

This document provides instructions for upgrading the Sage SalesLogix Network and Web components to Sage SalesLogix version 7.5 Service Pack 1. See Task 5 in Chapter 1, “Upgrade Workplan” for changes in this release.

Requirements

Before upgrading to version 7.5.1, you must:

- Ensure your current Sage SalesLogix version is 7.5 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, “Plugin Changes in this Release” outlines the plugin changes from Sage SalesLogix v7.5 to Service Pack 1. Use the Upgrade Workplan included in this document to guide your upgrade process.

If you have not upgraded to Sage SalesLogix v7.5, 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 7.5*
- *Upgrading Sage SalesLogix from Version 6.0.x or 6.1.x to 7.5*
- *Upgrading Sage SalesLogix from Version 6.2.x to 7.5*
- *Upgrading Sage SalesLogix from Version 7.0.x to 7.5*
- *Upgrading Sage SalesLogix from Version 7.2.x to 7.5*

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 v7.5 Service Pack 1. 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 Document the values for the Mashup Name and Result Name properties for all Timeline Visualization controls on each of your custom Web forms.	
	In this release, the Timeline Visualization control has been upgraded to point to a Mashup Data Source control instead of directly to a mashup processor. Custom forms that contain Timeline Visualization controls must be updated manually. Before you upgrade your Web installation, use the Application Architect to note the values for your Timeline Visualization controls. Then, Task 43 describes how to apply the changes after the upgrade.	
	3 Install this release in a test environment before installing on your production database. **Note** Refer to SupportOnline\Sage Software Online Support and Services Knowledge Base for more information. Search for "creating a test environment" for information on using a copy of your production database in a test environment.	
	4 Understand the Service Pack bundle extraction process.	
	Depending on the installation method you choose, service pack files and bundles may not be extracted to your local computer. • 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. Ensure you select the appropriate installation method when completing Task 18.	

✓	Task Description	Notes
	5 Understand the changes in this release. In addition to defect fixes, v7.5.1 contains the following new functionality: • The Web Client activities view has been modified to include a “split” view, filters, and a summary view. • You can control field level security access to individual fields in Web Client Detail views, List views, groups, and filters. Security profiles are created and maintained in the Administrator for both Network and Web users. • Web Reporting is available for Web Remote Offices. • Web Reporting has been modified so that one Web Reporting Server supports one Web site. In previous versions one Web Reporting Server could support multiple Web sites. • Disconnected Web Client users can subscribe/unsubscribe to accounts using the What’s New view. • Mail Merge is available for disconnected Web Clients. The processing handler for mail merge on the Web has been modified so that HTTP requests are targeted for processing by an ASP.NET assembly instead of an ISAPI module. The Web Client processing remains the same. This update removes the dependency on IIS for mail merge allowing mail merge to run using the Sage SalesLogix Personal Web Server. **Note** In v7.5.1 and later, Active Mail must be installed on the Web Host. You cannot host Active Mail on a machine other than the Web Host. • A user survey is embedded in the Web Client that is used to capture data related to user work practice. Web Client users are periodically prompted to participate in the online survey. You can add your own customizable survey for an application version. See the “Configuring the Work Practice Survey” topic in the Application Architect help for more information. • When creating a bundle manifest in Application Architect, you can set the Web bundle to contain a password that must be entered before the bundle can be installed. • Lotus Notes v7 and 8 support has been added in Intellisync for SalesLogix. • The following Application Architect components have been added or updated in this release: Panel control, MultiTab control, Sparkline control for Quick Forms, Mashup Data Source control. The build and deploy process has been improved to allow partial builds or builds of a specific area (such as assemblies). Build speed has also been increased. • Firefox v3.0x is supported for all Web Client functionality except Mail Merge, Export to File and Outlook Integration (SendSLX and Record to History).	
	Protect Your Network Customizations	
	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. However, this bundle can be used as a backup of your customizations.	
	7 Review the Sage SalesLogix plugin changes to determine if you have customized any plugins that are updated in this release. Review Chapter 2, “Plugin Changes in this Release” for all plugin changes.	

✓	Task Description	Notes
	8 After reviewing plugin changes, determine if you are going to add your customizations to the plugins in this release (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.	
	Prepare Your Sage SalesLogix Database	
	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.	
	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.	

<table>
<tr><th>✓</th><th>Task Description</th><th>Notes</th></tr>
<tr><td></td><td colspan="2">Upgrade your Main Office</td></tr>
<tr><td></td><td colspan="2">
18 Upgrade your Sage SalesLogix Server using the SLX_v75_SP1 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.
You must run the SLX_v75_SP1 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, disconnected Web Client, Synchronization Server, SpeedSearch Server, EmPulse Server, Web Host, Web Reporting Server, Web Manager, and Remote Office.
To run

Double-click SLX_v75_SP1.exe.
On the SalesLogix v7.5 Service Pack 1 screen, select your installation method:

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 30 and 31.

Click Next.
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.
When the installation indicates a successful upgrade, click Finished.
The upgrade is successful when the Status column displays Complete.
Restart your computer after the installation to ensure that all changes take effect.
You may automatically receive a prompt to restart.

</td></tr>
<tr><td></td><td>19 Upgrade your Administrative Workstation using the SLX_v75_SP1 installation.
Note For detailed steps to run the installation, see Task 18.</td><td></td></tr>
<tr><td></td><td>20 Upgrade your SpeedSearch Server using the SLX_v75_SP1 installation.
Note For detailed steps to run the installation, see Task 18.</td><td></td></tr>
</table>

✓	Task Description	Notes
	21 Upgrade your Synchronization Server using the SLX_v75_SP1 installation. **Note** For detailed steps to run the installation, see Task 18. Before installing the service pack, ensure the Synchronization Service (SLXSyncService) is stopped. In addition, shut down any instances of Synchronization Server in Task Manager.	
	22 Upgrade your EmPulse Server using the SLX_v75_SP1 installation. **Note** For detailed steps to run the installation, see Task 18.	
	23 Start the Administrator.	
	Install the Service Pack Bundle	
	24 Use the Administrator to apply the service pack bundle named SalesLogix v7.5 Service Pack 1.sxb. See the “Installing a Bundle” topic in the Administrator Help for instructions. 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_v75_SP1.exe before installation. The bundle contents are outlined in Chapter 2, “Plugin Changes in this Release”. This includes functionality formerly released in hot fixes.	
	Upgrade your Network Customizations	
	25 Apply the changes listed in Chapter 2, “Plugin Changes in this Release”. You can use one of the following strategies: • Add your customizations to the Sage SalesLogix plugins (recommended). • Add the Sage SalesLogix changes to your custom plugins.	
	26 After applying plugin 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	
	27 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.	

✓	Task Description	Notes
	28 Update your synchronization service jobs. To ensure compatibility with the Sage SalesLogix Server, you must update your synchronization service jobs. **To update** 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.	
	29 Restart the Sync Service(s).	
	Upgrade Sage SalesLogix Network Users	
	30 Upgrade each of your Sage SalesLogix Network user's computers using the SLX_v75_SP1 installation or the appropriate .MSP file. 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). After receiving the file, instruct your Network users to double-click **SLX_v75_SP1.exe** or **SalesLogix Client 7.5 SP1.msp** as appropriate.	
	Upgrade Sage SalesLogix Remote Users/Offices	
	31 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. 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 pieces. The .MSP files are located in the folder you specified when extracting the service pack files (see Task 18). Distribute the following .MSP files as appropriate: • For Remote users: **SalesLogix Client 7.5 SP1.msp** • For Remote Offices: **SalesLogix Remote Office 7.5 SP1.msp** • For disconnected Web Client users: **SalesLogix Disconnected Web Client 7.5 SP1.msp**	
	32 Direct Remote users and Offices to upgrade using the SLX_v75_SP1 installation or the appropriate .MSP file. Before upgrading a disconnected Web Client, instruct users to close the Sage SalesLogix Personal Web Server. After upgrading, restart the server. • To stop the server, right-click the **Sage SalesLogix Personal Web Server** icon in the application tray, and then click **Exit**. • To start the server, click **Start**, point to **Programs**, point to **Sage SalesLogix**, and then click **SalesLogix Web Server**.	

✓	Task Description	Notes
	33 Instruct Remote users and Offices to log on to the Synchronization Client and sync immediately after upgrading. **Note** Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.	
	34 Instruct users to log on to Sage SalesLogix.	
	Upgrade Web Components (if applicable)	
	35 Run the SLX_v75_SP1 installation on your Web Host(s).	
	Protect Your Web Customizations	
	36 Create a bundle of your Web customizations. **Note** If you have not customized your Web implementation, disregard this task and proceed to Task 37. Use the Application Architect to create a bundle of your customizations. Sage SalesLogix provides project backups that you can use to compare to your current database. A bundle is created from the differences. **To create** 1 Locate the **Sage SalesLogix v7.5 Project Backup.zip** file. If you selected the Extract and Install option when running the service pack installation, the default location for project backup files is C:\Documents and Settings\username\Local Settings\Temp\SalesLogix. 2 Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 3 In the Application Architect Project Explorer, open your current project. 4 If necessary, open the Output Window to display progress when creating your customization bundle. **Note** In the Project Explorer tree view do not expand nodes unnecessarily. Some nodes, such as the Portal Page Templates node, will autocreate items that may be included in your customization bundle. 5 Right-click **Bundle Model**, and then click **Create Manifest by Project Differences**. The Select a Project to Compare Against dialog box opens. 6 In the **Project Backup** box, browse to the Sage SalesLogix v7.5 project backup on your local computer (step 2), and then click **OK**.	

✓	Task Description	Notes
	Task 36 - continued 7 Clear the **Include deleted items that were added to the current project** check box. Clearing this check box ensures that items in the project's Recycle Bin are not included in the customization bundle as delete items. 8 Ensure the **Exclude the Following Files** check box is selected. Add **mnuSpeedSearch.menu.xml** to the list. Then, add any additional files you do not want to include in your bundle (even if they have been added or changed). By default, various Sage files are listed. For example, the Sage.*.dll excludes Sage assemblies from the bundle. The list supports wildcards using the asterisk character. Exclusion matching is performed against the URL, not just the filename, so folders may also be specified. 9 Click **OK**. The new manifest opens in the Application Architect. 10 On the New Manifest **Properties** tab, type a name in the **Name** box. For example, Customizations. 11 Save the manifest. 12 Expand **Bundle Model**, right-click the new manifest, and then click **Create Bundle**. 13 In the **Save Bundle** dialog box, browse to the location where you want to save the bundle, type a bundle name, and then click **Save**.	
	Upgrade Your Web Installation	
	37 Create a new project workspace. After creating a new project workspace, you can restore the v7.5.1 project model from backup into the workspace. This creates a v7.5.1 project workspace. **To create** 1 On the Application Architect **View** menu, click **Project Workspace Manager**. 2 Right-click in the **Project Workspaces** window, and then click **Add**. The Add Project Workspace dialog box opens. 3 In the **Name** box, type a name for the project workspace. 4 In the **Working Path** box, type or browse to the location where you want to save the new project workspace. The Source Path is automatically set to the working source location. 5 In the **Description** box, type a description or additional information about the new project. 6 Ensure the **Export Files Upon Creation** check box is not selected. 7 Click **Create**.	

<table>
<tr><th>✓</th><th>Task Description</th><th>Notes</th></tr>
<tr><td></td><td>38 Restore the Sage SalesLogix v7.5.1 project backup to the new project workspace (created in Task 37).</td><td></td></tr>
<tr><td></td><td colspan="2">
Sage SalesLogix provides a project backup file that contains all Web changes for this release. You must add these changes to upgrade your Web installation. When upgrading with project backups, you do not need to apply Web upgrade bundles.
To restore

Locate the Sage SalesLogix v7.5.1 Project Backup.zip file. If you selected the Extract and Install option when running the service pack installation, the default location for project backup files is C:\Documents and Settings\username\Local Settings\Temp\SalesLogix.
Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible.
Open the Application Architect.
In the Project Workspaces window, select the project workspace you created in Task 37.
Right-click the project, and then click Restore Project.
In the Select Project Backup File to Restore From dialog box, browse to the Sage SalesLogix v7.5.1 project backup on your local machine (step 2).
Click OK.

</td></tr>
<tr><td></td><td>39 Close the Application Architect, stop and restart all Sage SalesLogix services, and reset IIS.</td><td></td></tr>
<tr><td></td><td colspan="2">Install Web Bundles</td></tr>
<tr><td></td><td>40 Use Application Architect to apply your custom bundle.
Note If you have not customized your Web implementation, disregard this task.</td><td></td></tr>
<tr><td></td><td colspan="2">
Install the bundle you created of your customizations (Task 36) to the new v7.5.1 project workspace.
During the bundle installation, you can merge your customizations with the Sage SalesLogix changes. You can also validate the changes if there are duplicate items between the current project and the bundle you are installing.
Note The default behavior is to overwrite the item in the target project (the 7.5.1 Sage SalesLogix version of the item) with your customization (from the customization bundle).
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).
To merge changes during bundle installation

In the Project Explorer, right-click your project folder, and then click Install Bundle.
The Select Bundle to Install dialog box opens.
Browse to and select the bundle you created in Task 36 containing your customizations, and then click Open.
The Install Bundle dialog box appears.
Verify the Bundle Path information is correct, and then click Next.
The Optional Merged Content Path from a Previous Install option allows you to continue resolving conflicts from a prior bundle installation. If you have extensive customizations, you may have a large number of conflicts that must be resolved when applying your custom bundle.

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</table>

✓	Task Description	Notes
	Task 40 - continued If you use Preserve Merged Content (step 6), you can resolve conflicts over an extended period of time. For example, you may be installing a customization bundle with 50 conflicts and you have resolved only 25 of the conflicts. If you click the Preserve Merged Content button, cancel the installation, then apply the same bundle at a later time, use the Optional Merged Content Path to browse to the folder with merged content. Then, you can continue to resolve the remaining 25 conflicts from your customization bundle. 4 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. 5 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. Assembly support files that are developed by Sage may be included in your customization bundle. These files are not necessary for the merge process. 6 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. If you cannot resolve all conflicts at one time, click this button and use the Optional Merged Content Path from a Previous Install option when reapplying the bundle (step 3). 7 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. 8 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 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. 9 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. **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. 10 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. **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. 11 (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. 12 If you need 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. 13 Click **Next**. 14 Click **Finish**.	

✓	Task Description	Notes
	41 If necessary, reapply your custom schema to the database. If you are applying a customization bundle that relies on custom schema to a new or different database than the database where the schema was developed, then you must also apply the bundle that contains your custom schema to the new database. Generally, you need to apply your custom schema if you created your customization bundle on a different database than the one on which you are applying the customization bundle. If you are restoring a project to the same database that your customizations were created on, the custom schema is already included.	
	42 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. The SLX_v75_SP1 installation overwrites the existing Web Help Configuration file with the updated v7.5.1 file. If you have customized this file, you must reapply your customizations. **To update** 1 Create a backup of the v7.5.1 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_v75_SP1 installation on the Web Host (Task 35). A backup is recommended before restoring your customizations. If errors occur while merging changes and you do not have a backup of the v7.5.1 Help, you must reapply the upgrade patch to access a copy. 2 Compare the v7.5.1 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 v7.5.1 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.	
	43 Update Timeline Visualization controls on your custom forms. **To update** 1 In the Application Architect, open a custom form that contains a Timeline Visualization control. 2 Use each Mashup Name/Result pair you recorded in Task 2 to create a Mashup Data Source control on the form. 3 For the Timeline Visualization **Data Source** property, set a value by selecting one of the Mashup Data Source control names from the drop-down list. 4 Save the form. 5 Repeat these steps for each custom form that contains a Timeline Visualization control.	

✓	Task Description	Notes
	44 Delete the ReferenceAssemblies folder. Before building and deploying your Web portal(s), you must delete the ReferenceAssemblies folder on the Application Architect computer. If this folder exists when building the portal(s), you may see an error message. By default, the ReferenceAssemblies folder is located in C:\Program Files\SalesLogix. To verify the folder location, check the Assemblies Path information in the Application Architect. **To find the folder location** 1 On the Application Architect **Tools** menu, click **Build Settings**. 2 In the **Assemblies Path** box, note the location of the ReferenceAssemblies folder. 3 Using the location in step 2, delete the ReferenceAssemblies folder.	
	Build and Deploy your Web Portals	
	45 Use the Application Architect to build and deploy the appropriate Web portal(s). See the “Rebuilding the Web Platform” and “Using the Deployment Explorer” topics in the Application Architect Help for instructions. **Note** Use the Rebuild option when upgrading.	

✓	Task Description	Notes
	46 Upgrade Web Reporting.	

Manual configuration of the Web Reporting Server in Application Architect is no longer required. Web Reporting is enabled by deploying the Web Reporting portal using the Deployment Explorer. The Web Reporting portal contains the Web Reporting application files and is deployed as a dependency of the SlxClient portal.

If you are running Web Reporting at your main office and any Web Remote Offices, you must deploy the Web Reporting portal to both locations.

Note If you want to add Web Reporting to a Web Remote Office, you must install the Web Reporting Server at the Remote Office using the Sage SalesLogix v7.5 DVD. Then upgrade the server using the following steps.

To upgrade

1 Run the SLX_v75_SP1 installation on your Web Reporting Server.

2 Open the Application Architect Deployment Explorer.

3 Deploy the Web Reporting portal to IIS.

  a Right-click **Deployments**, and then click **Add New Deployment**.

  b In the **Name** box, type Web Reporting

  c In the **Description** box, type Web Reporting.

  d Right-click **Deployment Targets** and then click **Add Target(s)**.

  e In the **Select Target(s)** dialog box, select **IIS** and **slxwebrpt**, and then click **OK**.

  f In the **Deployment Targets** tree view, expand IIS, and then select **slxwebrpt**.

  g Under **IIS Target Settings**:

  - In the **Server** box, type the name of the Web Reporting server.

Note If you change the Server name, you must specify the host name in the Base Directory box. For example, if your host is Win2k3, then the Server is Win2k3 and the Base Directory is \\Win2k3\inetpub\wwwroot. You can browse to and populate the Base Directory field with the shared folder path for the specified Web hosting server.

  - In the **Base Directory** box, type the Web Reporting installation path (for example, C:\Program Files\SalesLogix\Web Components).
  - In the **Port** box, type the port used when installing Web Reporting (for example, 3334).
  - In the **App Pool** box, verify the setting is **SalesLogix** (if Web Reporting is on the same server as the Web Host) or **SLX Web Reporting** (if Web Reporting is on a dedicated server).
  - Select the **Restore Virtual Directory Settings on Update** check box.

  h Click **Save**.

  i Click **Deploy**.

✓	Task Description	Notes
	Task 46 - continued 4 Open the SlxClient portal. • For the main office: Double-click **Core Portals**, expand **Deployment Targets**, expand **IIS**, and then select **SlxClient**. • For a Web Remote Office: Double-click **Remote Sales Client**, expand **Deployment Targets**, expand **Remote Office(s)**, and then select **SlxClient**. 5 In the Advanced Options section, click **Web Dependencies**. 6 In the **Manage Custom Service Host Entities** dialog box, click **Add**. The Service Host Entry Editor dialog box opens. 7 In the **Entity Name** box, type *slxwebrpt*. 8 In the **Service URL** box, type the URL for the Web Reporting portal. Use the format: http(s)://server_name:port_number/slxwebrpt. 9 Click **OK**. Then, click **Done**. 10 Save and deploy the Web site. 11 Reset IIS.	
	47 Import your upgraded project to the VFS. After upgrading, you may want to import your upgraded project (stored locally) to the Virtual File System (containing the older project). This ensures the project in the VFS is the most recent version. For detailed steps to import the project, see the “Importing from Another Project” topic in the Application Architect Help.	
	48 Instruct disconnected Web Client users to log on to the Synchronization Client and sync immediately after upgrading. **Note** Ensure users enable “Apply Changes” during the synchronization cycle.	
	Upgrade Intellisync for SalesLogix	
	49 Upgrade your Intellisync for SalesLogix installation. **Note** If your installation does not include Intellisync, proceed to Task 54. No upgrade is required. Use the following tasks to upgrade Intellisync. Depending on your current installation, you may need to complete one or more tasks. • To upgrade Sage SalesLogix Network and/or Remote Clients, see Task 50. • To upgrade the Web Host and Web Clients, see Task 51. • To upgrade a Remote Office, see Task 52. • To upgrade a disconnected Web Client, see Task 53.	

✓	Task Description	Notes
	50 Upgrade your Sage SalesLogix Network and/or Remote Client Intellisync installation. **Important** If Intellisync is already installed on the Client computer, instruct users to uninstall the current version before completing the following steps. The installation will not upgrade an existing Nokia version. **To upgrade** 1 Locate the **IntellisyncInstall.zip** file. When you extract the service pack files to your local machine, the SLXIntellisync.zip file is placed in the Common folder. When you extract the SLXIntellisync.zip file, the IntellisyncInstall.zip file is placed in the Downloads folder. 2 Distribute the **IntellisyncInstall.zip** file to all Network and Remote Clients. If necessary, you can place the zip file in a shared network folder for Network Client access. 3 Instruct users to extract the **IntellisyncInstall.zip** file to a temporary folder. 4 In the temporary folder, double-click **setup.exe**. 5 In the **Choose Setup Language** box, select your language, and click **OK**. 6 On the **Welcome** screen, click **Next**. 7 On the **Program Maintenance** screen, select **Modify**, and then click **Next**. 8 On the **Custom Setup** screen, click **Next**. 9 Click **Install** and **Finish** to complete the installation.	
	51 Upgrade your Web Host and Web Client Intellisync installations. **To upgrade** 1 In Application Architect, rebuild and deploy the SLX Intellisync Web Portal. See the “Rebuilding the Web Platform” and “Using the Deployment Explorer” topics in the Application Architect Help for instructions. 2 Locate the **IntellisyncInstall.zip file**. When you extract the service pack files to your local machine, the SLXIntellisync.zip file is placed in the Common folder. When you extract the SLXIntellisync.zip file, the IntellisyncInstall.zip file is placed in the Downloads folder. 3 Copy the **IntellisyncInstall.zip** file to C:\Inetpub\wwwroot\SlxIntellisync\Downloads on the Web Host. Replace the current file if one exists. 4 Reset IIS. 5 If Intellisync is already installed on the Client computer, instruct users to uninstall the current version before completing the following steps. The installation will not upgrade an existing Nokia version. 6 On each Web Client computer: Open a Web page and go to the following URL: http://{WebHostmachine}:{port}/Slxintellisync/default.aspx. A new hyperlink will display "Download the Intellisync Client from here". 7 Instruct users to click the hyperlink, click **Open**, and then double-click **setup.exe**. 8 In the **Choose Setup Language** box, select your language, and click **OK**. 9 On the **Welcome** screen, click **Next**. 10 On the **Program Maintenance** screen, select **Modify**, and then click **Next**. 11 On the **Custom Setup** screen, click **Next**. 12 Click **Install** and **Finish** to complete the installation.	

✓	Task Description	Notes
	52 Upgrade your Remote Office Intellisync installations. Complete this task for all Sage SalesLogix Remote Office computers where the Intellisync portal was not created during the initial installation, but was deployed via the Application Architect with an IIS configuration. **Note** If the Intellisync portal was created during your v7.5 installation with either IIS or Personal Web Server selected, you only need to cycle the Synchronization Server and Synchronization Client to upgrade your Remote Office. **To upgrade** 1 In Application Architect, rebuild and deploy the SLX Intellisync Web Portal. See the "Rebuilding the Web Platform" and "Using the Deployment Explorer" topics in the Application Architect Help for instructions. 2 Locate the **IntellisyncInstall.zip file**. When you extract the service pack files to your local machine, the SLXIntellisync.zip file is placed in the Common folder. When you extract the SLXIntellisync.zip file, the IntellisyncInstall.zip file is placed in the Downloads folder. 3 Copy the **IntellisyncInstall.zip** file to C:\Inetpub\wwwroot\SlxIntellisync\Downloads on the Web Host. Replace the current file if one exists. 4 Reset IIS. 5 Cycle your Synchronization Server. 6 Instruct the Remote Office to log on and cycle the Synchronization Client. 7 If Intellisync is already installed on the Client computer, instruct users to uninstall the current version before completing the following steps. The installation will not upgrade an existing Nokia version. 8 On each Web Client computer: Open a Web page and go to the following URL: http://{WebHostmachine}:{port}/Slxintellisync/default.aspx. A new hyperlink will display "Download the Intellisync Client from here". 9 Instruct users to click the hyperlink, click **Open**, and then double-click **setup.exe**. 10 In the **Choose Setup Language** box, select your language, and click **OK**. 11 On the **Welcome** screen, click **Next**. 12 On the **Program Maintenance** screen, select **Modify**, and then click **Next**. 13 On the **Custom Setup** screen, click **Next**. 14 Click **Install** and **Finish** to complete the installation.	

✓	Task Description	Notes
	53 Upgrade your disconnected Web Client Intellisync installations. **To upgrade** 1 In Application Architect, rebuild and deploy the SLX Intellisync Web Portal. See the "Rebuilding the Web Platform" and "Using the Deployment Explorer" topics in the Application Architect Help for instructions. 2 Locate the **IntellisyncInstall.zip file**. When you extract the service pack files to your local machine, the SLXIntellisync.zip file is placed in the Common folder. When you extract the SLXIntellisync.zip file, the IntellisyncInstall.zip file is placed in the Downloads folder. 3 Copy the **IntellisyncInstall.zip** file to C:\Inetpub\wwwroot\SlxIntellisync\Downloads on the Web Host. Replace the current file if one exists. 4 Reset IIS. 5 Cycle your Synchronization Server. 6 Instruct the Remote Office to log on and cycle the Synchronization Client. 7 If Intellisync is already installed on the Client computer, instruct users to uninstall the current version before completing the following steps. The installation will not upgrade an existing Nokia version. 8 On each Web Client computer: Open a Web page and go to the following URL: http://{WebHostmachine}:{port}/Slxintellisync/default.aspx. A new hyperlink will display "Download the Intellisync Client from here". 9 Instruct users to click the hyperlink, click **Open**, and then double-click **setup.exe**. 10 In the **Choose Setup Language** box, select your language, and click **OK**. 11 On the **Welcome** screen, click **Next**. 12 On the **Program Maintenance** screen, select **Modify**, and then click **Next**. 13 On the **Custom Setup** screen, click **Next**. 14 Click **Install** and **Finish** to complete the installation.	
	Perform Post-Upgrade Tasks	
	54 If necessary, enable Windows Authentication for Firefox. The following instructions configure Windows Authentication for Web Client users accessing Sage SalesLogix with Firefox. **To enable** 1 Open Firefox. 2 In the **Location Bar**, type *about:config*, and then press **Enter**. 3 If a warranty message opens, click **I'll be careful, I promise!**. 4 Double-click the **network.automatic-ntlm-auth.trusted-uris** preference. 5 In the **Enter string value** box, type your Web Host URL using the format http://hostserver:port. 6 Click **OK**.	

✓	Task Description	Notes
	55 If necessary, create and assign field level security profiles to Web Client users. You can create new security profiles or assign existing profiles to Web Client users. See the following Administrator Help topics for field level security information and instructions: • Security Profile Manager • User Profile Security Tab	
	56 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.	

Chapter 2
Plugin Changes in this Release

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

Refer to the Fixed Issues List for v7.5.1 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.

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 Fields

Table Name	Field Name	7.5.1
VIRTUALFILESYSTEM	ISCOMPRESSED	✓

Changes to Existing Forms

Form Name / Change	7.5.1
Account:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓

Form Name / Change	**7.5.1**
Campaign:Targets • Modified the Height and Width of controls on the form.	✓
Contact:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Contract:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Contract:Covered Assets • Modified the script on the form.	✓
Contract:Tickets • Modified the script on the form.	✓
Defect:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Lead:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Opportunity:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Opportunity:Contacts • Modified the script on the form.	✓
Opportunity:Sales Process • Modified the script on the form.	✓
RMA:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
RMA:Return Details • Modified the script on the form.	✓
System:Activity Details View • For the lveAccount:TLookupEdit control, set LookupRestrictAlways to blank, and LookupRestrictField to ACCOUNTID. For the lveOpportunity:TLookupEdit and lveTicket:TLookupEdit controls, set LookupRestrictAlways to blank, LookupRestrictField to ACCOUNTID, and LookupRestrictOp to =. Modified the script on the form.	✓
System:Add Edit Campaign Stage • For the txtDescription:TEdit control, set MaxLength to 64.	✓
System:Add Edit Response • Modified the script on the form.	✓
System:Add Edit Sales Order • Modified the script on the form.	✓
System:Add Edit Ticket Activity • Modified the Width of controls on the form. Modified the script on the form.	✓
System:Add Targets From Group • Modified the script on the form.	✓
System:Close Opportunity • Modified the Width of controls on the form. Modified the script on the form.	✓
System:Email - Send Ticket Information • Modified the script on the form.	✓

Form Name / Change	**7.5.1**
System:History Details View • For the cmdMeeting:TButton control, set Tag to 100. For the cmdPhone:TButton control, set Tag to 200. For the cmdToDo:TButton control, set Tag to 300. For the lveContact:TLookupEdit control, set LookupRestrictAlways to blank, LookupRestrictField to ACCOUNTID, LookupRestrictOp to =, ReadOnlyEditor to True, and TabStop to True. Modified the script on the form.	✓
System:Insert Campaign • Modified the Width of controls on the form. Modified the script on the form.	✓
System:Insert New Ticket • Added the edtDescription:TEdit and edtResolution:TEdit controls. For the memComments:TMemo control, set Height to 169 and Width to 79. For the memDescription:TMemo control, set Width to 151 and OnExitControl to memDescriptionExitControl. For the memResolution:TMemo control, set Width to 151 and OnExitControl to memResolutionExitControl. Modified the script on the form.	✓
System:Insert Opportunity • Modified the script on the form.	✓
System:Lead Detail • Modified the script on the form.	✓
System:Manage Alternate Addresses • Modified the script on the form.	✓
System:MoveContact • For the rgCopyMove:TRadioGroup control, set ItemIndex to 1, and Text to Move the Contact to the New Account. Modified the script on the form.	✓
System:Select Contact(s) • For the cboFilterBy:TComboBox control, set ItemIndex to -1 and Text to blank. For the lblFilterBy:TLabel control, set Width to 40. Modified the script on the form.	✓
System:SLX Report Manager View • Modified the script on the form.	✓
System:Ticket Detail • Modified the Width of controls on the form. Modified the script on the form.	✓
System:View History Attachments • For the grdAttach:TDataGrid control, modified the SQL property. Modified the script on the form.	✓
Ticket:Attachments • For the grdAttach:TDataGrid control, modified the SQL property.	✓
Ticket:Details • Added the edtDescription:TEdit and edtResolution:TEdit controls. For the memDescription:TMemo control, set OnExitControl to memDescriptionExitControl. For the memResolution:TMemo control, set OnExitControl to memResolutionExitControl. Changed the Height and Width of controls on the form. Modified the script on the form.	✓
Ticket:Ticket Activities • Modified the Height and Width of controls on the form. Modified the script on the form.	✓

Updated Global Scripts

See “Finding Script Changes” on page 21 for more information on finding script changes.

Script Name	7.5.1
System:Global System	✓

Updated VB Scripts

See “Finding Script Changes” on page 21 for more information on finding script changes.

Script Name	7.5.1
Dashboard:Export Support	✓
System:Notes History Common	✓
System:SLX_Export_Group_To_Excel	✓
System:SLX Lead Info	✓
System:SLX Print Detail	✓
System:SLX Report Conditions	✓
System:SLX Report Condition Builder Controller	✓
System:SLX Report Controller	✓
System:SP_SalesProcessFunctions	✓
Ticket:SLX Ticket Common	✓

Changes to Existing Groups

Name	7.5.1
CONTRACT:Active Contracts	✓
CONTRACT:All Contracts	✓
CONTRACT:Pending Expirations	✓

Changes to Existing Menus and Toolbars

Name / Change	7.5.1
Menus System:Standard Menus • Added Create New Group item under the CampaignNavMenu > Groups item.	✓

Changes to Existing Reports

Name / Change	7.5.1
Account:Account Phone List - Sample • Removed table metadata that is no longer part of the Sage SalesLogix schema.	✓
Contact:Contact Address Book - Sample • Removed table metadata that is no longer part of the Sage SalesLogix schema.	✓
Contact:Contacts By Account - Sample • Removed table metadata that is no longer part of the Sage SalesLogix schema.	✓
Opportunity:Potential Sales Opportunities - Sample • Removed table metadata that is no longer part of the Sage SalesLogix schema.	✓