Applying Web Hot Fix Package 03 for Sage SalesLogix Version 7.5.2

Version 7.5.2.03

Developed by Sage SalesLogix User Assistance

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This hot fix addresses the following issues:

Defect	Description
1-72896	In the Campaign Target lookup, the lookup is using the Contact's account address rather than the Contact's address.
1-73082	GroupList on detail reviews returns all data, but should return only visible data.
1-73179	Application Architect: A data source control is not being exposed when the Generate Member property is set to True.
1-73313	During the Complete Activity process, if a timeless activity is changed to a timed activity, the History.CompletedDate has the incorrect time (which includes the 05 seconds).
1-73318	When scheduling a timeless activity, the “originally for” date (in the bottom left corner of the Complete Activity dialog for timeless activities) is incorrect.
1-72323	Query trying to order by a column that isn’t specified.
1-73330	Regarding value does not carry over to the follow up activity.
1-73342	Filters do not work correctly for custom created groups in the Activity Manager.
1-73344	The fields *Actual Amount* and *Closed On* are duplicated in the Opportunity Snapshot if the Opportunity Status is a custom value.
1-73347	Event Viewer Error: ValueByteArray() issue. Report Plugin buffer size not large enough
1-73348	An error occurs when navigating through multiple pages of Campaign Responses.
1-73377	In the Activity Reminder, the start time for timeless activities shows the previous day.
1-73455	An error occurs in the HQL query when list view filters contain a string with un-escaped quotes in the value.
1-73469	An error occurs in the Event Log on the Web Server when completing a single instance of a recurring activity.
1-73493	After creating a new group, adding Seccodeid as a condition, only the Seccodeid displays, not the corresponding team name.
1-73516	When adding a custom field to a template, an error occurs: “Error loading "path\SLDBSchema.xml". Schema file: path\SLDBSchema.xml, does not exist”.
1-73519	Contact.LastHistoryDate field is not updated when a History or Note record is created.
1-73591	An error occurs when there are newline chars in the opportunity description field.

Defect	Description
1-73616	An error occurs after selecting Opportunity Statistics in a particular scenario: “Object doesn't support this property or method”.
1-73662	Campaign Targets are removed though they are not selected.
1-73705	Conditions are not displayed correctly for some joins in Query builder.
1-73706	Group features do not work properly when a field with a userid other than the twelve character SalesLogix Standard ID (AKA = :userid) is used.
1-73769	When associating an Opportunity/Ticket with an activity, the Contact and Account change to the account/contact associated with the item.
1-73788	Reports display timeless activities with the wrong date.

This hot fix requires version 7.5.2 and all previous Web hot fix packages beginning with 7.5.2 Web Hot Fix 01. 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_v752_Web_HF03.zip	SLX_v752_Web_HF03.exe, Sage SalesLogix v7.5.2 Web HF03 VFS Upgrade.zip
SLX_v752_Web_HF03.exe	GroupTranslator.dll, MailMerge.chm, Sage.Platform.dll, Sage.Platforms.Quickforms.QFControls.dll, Sage.Platform.WebPortal.dll, Sage.Saleslogix.Client.Groupbuilder.dll, Sage.SalesLogix.Web.Controls.dll
Sage SalesLogix v7.5.2 Web HF03 VFS Upgrade.zip	ActivityDetails.ascx.cs, ActivityReminders.ascx.cs, Base.Master, CampaignTargets.ascx.cs, CompleteActivity.ascx.cs, CompleteActivityCommandController.ascx.cs, Dashboard.Master, Filters.ascx, GroupTranslator.dll, ManageTargets.ascx.cs, OpportunitySnapshot.ascx.cs, sage-controls-filter-clientscript.js, sage-platform.js, sage-platform-cliententitycontext.js, sage-platform-debug.js, Sage.Platform.dll, Sage.Platform.WebPortal.dll, Sage.SalesLogix.dll, Sage.SalesLogix.Activity.dll, Sage.Saleslogix.Client.Groupbuilder.dll, Sage.SalesLogix.Client.Reports.dll, Sage.SalesLogix.Web.Controls.dll, Sage.SalesLogix.Web.UI.Activity.dll, SlxActiveMail.cab, TargetResponses.ascx, TargetResponses.ascx.cs, testcomplete.js
SLXActiveMail.cab	SLMN.dll, SLXDocW.dll, SLXEmailNotifier.dll, SLXFaxW.dll, SLXFramer.ocx, SLXMMEngine.dll, SLXMMGuiW.dll, SLXWinFax.dll

Applying the Hot Fix

Ensure you have applied all previous hot fix packages beginning with 7.5.2 Web Hot Fix 01 prior to installing this hot fix. Apply the hot fix to all computers where the Application Architect, Web Host, and/or disconnected Web Clients are installed. Install the bundle using the Application Architect.

To address the fix for defect #73342, you must change the buffered result cache size in the script and follow the instructions for creating custom group tabs. See "Changing the Cache Size" on page 4 and "Creating Group Tabs" on page 4.

When you have completed the changes for defect #73442, build and deploy your Web site(s).

Applying the Patch

The patch must be applied to all computers where the Application Architect, Web Host, and/or disconnected Web Clients are installed.

To apply

1. Close all Sage SalesLogix applications on the computer to which you are applying the hot fix.
2. Extract the contents of the **SLX_v752_Web_HF03.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the hot fix files and double-click **SLX_v752_Web_HF03.exe**.
4. On the **SalesLogix - v7.5.2 Hot Fix 03** 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 prevents 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**.

Installing the Bundle

Before installing the bundle, review the files included in the hotfix. Backup 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 hotfix items with the customized items.
- Apply the bundle (overwriting all existing items), and then manually merge the customized items.

To install

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 v7.5.2 Web HF03 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**.

Changing the Cache Size

To allow customized group tabs to reflect the proper counts in their filters, you must change the buffered result cache size in the applicable javascript. The change adjusts the size for all list views. This addresses defect #73342.

To change

1. Locate and open the **sage-controls.js** file in an editor.

   The default path is Model\Portal\SlxClient\SupportFiles\jscript\sage-controls\sage-controls-listpanel.js.
2. Find the line: **var store = new Sage.SalesLogix.Controls.BufferedStore**.
3. Set the cache to 150.

```
var store=new
Sage.SalesLogix.Controls.BufferedStore({autoLoad:false,bufferSize:150,reader:reader,filt
er:{},url:"/",builder:
```

4. Save the change and close the file.
5. Repeat steps 1-4 for the following files: **sage-controls-debug.js**, and **sage-controls-listpanel.js**.

Note The default path is the same for all three files.

Creating Group Tabs

There are several steps to create a new group tab in the Activity List View. Sage recommends copying and pasting the existing similar section in the .xml file and making changes to the copy. This addresses defect #73342.

To create

1. Locate and open the **ActivitiesViewConfiguration.xml** file in an editor.

   The default locations are:
   - \inetpub\wwwroot\SlxClient\App_Data\
   - Model\Portal\SlxClient\SupportFiles\App_Data\
2. Find the section beginning with **<!--All Open-->**, copy the section, and then paste it after the original section.
3. Make the following changes to the copied section:

```
<!-- All Open - With Attachments -->
    <group name="all attachments" type="Sage.Entity.Interfaces.IActivity,
Sage.Entity.Interfaces">
      <query sparse="true" count="true" cacheable="true">
```

4. Create a new condition to customize the result set in the query of the new group.

```
<conditions>
          <!-- select only Activities that contain attachments-->
          <condition>a.AttachmentCount > 0>
```

5. Save and close the file.
6. Locate and open the **ActivityViewer.ascx** file in an editor.

   The default locations are:

   - \inetpub\wwwroot\SlxClient\SmartParts\Activity\
   - Model\Portal\SlxClient\SupportFiles\SmartParts\Activity\
7. Add a new tab to the tabItems collection to contain the group in ActivityViewer.ascx.

```
var tabItems = [{
            id: "all_open_attachments",
            title: SR.ActivityTabs_AllOpen,
            connections: {
                list: {
                  resource: "slxdata.ashx/slx/crm/-/activities/activity/all attachments",
                    parameters: { count: "true" }
                },
                summary: false{
                    resource: "slxdata.ashx/slx/crm/-/activities/activity/all-summary",
                    parameters: { count: "true" }
                }
            },
            managers: { }
```

8. Save and close the file.
9. Locate and open the **ActivityFilters.ascx** file in an editor.

   The default locations are:

   - \inetpub\wwwroot\SlxClient\SmartParts\TaskPane\Filters\
   - Model\Portal\SlxClient\SupportFiles\SmartParts\TaskPane\
10. Enable filters for the new group.

```
Sage.PopulateFilterList = function() {
        var svc = Sage.FilterManager.GetManagerService();
        var GetVisibleFilters = function() {
            var tabPanel = Ext.ComponentMgr.get('activity_groups_tabs');
          var visibleFilters = { LitRequest: false, UserNotification: false, Event: false,
Activity: false };
            if (tabPanel) {
                visibleFilters.LitRequest = (tabPanel.activeTab.id == 'literature');
              visibleFilters.UserNotification = (tabPanel.activeTab.id == 'confirmation');
                visibleFilters.Event = (tabPanel.activeTab.id == 'event');
                visibleFilters.Activity = (tabPanel.activeTab.id == 'all_open')
                || (tabPanel.activeTab.id == 'all_open attachments'); }
            return visibleFilters;
        }
```

11. Save and close the file.

Note The filters displayed are the same as the main group whether columns are added or removed. The filter result counts respond to the newly designed query.

Building and Deploying Web Site(s)

Ensure the changes to the .xml and .ascx files are complete, and saved, prior to building and deploying. The changes made are available after deployment.

If Web Reporting was deployed to Program Files\SalesLogix\Web Components\slxwebrpt\bin, you must remove the file Sage.Platform.dll, and then rebuild and deploy. The updated version of the .dll is deployed with the new Web site.

If the file it not updated, errors may occur in Application Architect and the build may fail.

Note This is the only occurrence of the file that must be removed.

To remove the .dll

1. Navigate to **\Program Files\SalesLogix\Web Components\slxwebrpt\bin**.
2. Delete **Sage.Platform.dll**.
3. Proceed to the build and deploy steps.

To build and deploy

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.

Note 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.