

# Applying Web Update 01 for Sage SalesLogix Version 7.5.4

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Version 7.5.4.01

Developed by Sage SalesLogix User Assistance



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# Applying Web Update 01 for Sage SalesLogix Version 7.5.4

<b>Documentation Comments</b>	This documentation was developed by Sage SalesLogix User Assistance. For content revisions, questions, or comments, contact the writers at Sage SalesLogix.techpubs@sage.com.
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<b>Version</b>	Version 7.5.4.01 (Web Update) 2011
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This update requires Sage SalesLogix version 7.5.4. Do not install this update on any other Sage SalesLogix version. Contact your support representative or go to <http://support.SalesLogix.com> to obtain the update.

This update addresses the following Sage SalesLogix Web Client issues:

Defect	Description
1-80856	Entries in Notes/History tab Type column are corrupted where Cyrillic characters are used.
1-80865	Check for Duplicates dialogs display some unlocalized labels.
1-80869	Promote to Dashboard dialog displays unlocalized labels.
1-80871	Today's Activity Settings edit dialog displays unlocalized items.
1-80883	Buttons and tooltip labels on the Notes/History filters dialog are not translating some languages.
1-80884	String "No data to display" is not localized in Sales Dashboard pane "My Activity by Type."
1-80890	Opportunity - Lookup Product dialogs are not localized.
1-80900	The "Account" filter is not localized in the Activities list view, Common task pane or Literature tab.
1-81052	Reminders are always saved as 15 minutes when using Mobile or follow-up activities using Send SLX.
1-81122	Rename SixTabGrid in code to EditableGrid.
1-81123	Enhanced Loading message when adding and deleting items from the editable grid to display immediately rather than waiting for datastore fetch.
1-81137	Standard Resolution list view displays unlocalized field label.
1-81151	The terms Type and Status are not translated in Account Lookup dialogs.
1-81207	When editing a Sales Order Snapshot, adding a value to any field in the form, and then clicking OK causes the form to go blank. The only way to close the form is to hit the X button in the top right of the form.
1-81255	The \Model\Portal\SlxClient\ChildPages\Return\SmartParts\ReturnDetails.smartpart.xml.fr.resx is not copied from the VFS bundle into a project in Application Architect.
1-81300	Unable to deploy Web Reporting to a remote IIS Server.
1-81307	Unable to properly select a sales process consisting of Russian characters in the Web Client.

<b>Defect</b>	<b>Description</b>
1-81332	An error occurs during login to the Web Client when users have access to other user's calendars (an F5 refresh resolves the error).
1-81370	Having more than one dependency lookup on a form causes the first dependency lookup to fail.
1-81372	Web Client user password is not case sensitive.
1-81416	Share page displays unlocalized button and column names.
1-81417	Show hidden tab page displays unlocalized tab names.
1-81418	Merge Records page displays unlocalized column names.
1-81419	Log Off page displays unlocalized Log On button.
1-81420	Dashboard page displays unlocalized message when adding new content.
1-81443	Default exported file name is not localized.
1-81457	Name of copied localized group is not localized.
1-81532	On Layout tab in the Query Builder, Table and Field names are not displaying correctly.
1-81618	OFDataGridCol Collection Editor title bar labeled incorrectly.

This update addresses the following Accounting Integration issues:

<b>Defect</b>	<b>Description</b>
1-77144	Sage1000/X3 - It is not possible to get matching results when using more than 1 matching condition.
1-80718	Merging SalesOrders from an ERP system while using the tradingAccount DeDupe functionality - should not be allowed under specific conditions.
1-80754	Promote Trading Account - Dialog - Matching logic should only present filters based on the ERP Instance Schema availability (sme:canFilter).
1-80818	Date Requested on Sales Order description needs to be updated.
1-80872	A Sync Service error appears when a disabled end point exists.
1-80971	Lock Price on a Sales Order is not being adhered to. Selecting "apply changes" on the Price Check dialog overrides the value.
1-81039	A TradingAccount with the type "Supplier" should be rejected by Sage SalesLogix if synced from ERP. Suppliers are not supported in this version.
1-81043	Error occurs when attempting to do a Check Price and there is no product.
1-81044	Error when attempting Submit to Accounting System function and there is no product.
1-81092	Sync was not clearing the session after a Sales Order record failed.
1-81097	Sage 1000 - Error appears when opening the Deliveries tab within the Invoices Detail view.
1-81098	An error appears when viewing the Sales Order Detail Deliveries tab.
1-81099	The name link within the Address tab of the Sales Order Details under the name column is broken.
1-81100	The Date Opened field in the Accounting Details tab of any account synced from S1000 is not populated.

<b>Defect</b>	<b>Description</b>
1-81101	The 'Create a new customer account for SSS account' option should be the default option selected when entering Link to accounting on the Select or create account form.
1-81102	X3 - ISO date-only string values (e.g. "2011-06-08") are not being recognized as dates.
1-81106	The mapping for the order total and net total for incoming Sales Orders and Quotes is not correct when dealing with the discount total.
1-81112	The Discount on the Product grid is cleared when the Add Product dialog is still open and another product is added.
1-81133	Primary Contacts promoted as part of the new account promotion do not have the APPID or GLOBALSYNCID set in the CONTACT table.
1-81134	Receive the error "Object Reference not set to an Instance of an Object" during sync update for existing resource where the resource does not have an AppId defined.
1-81152	X3 - Call to GetImportedSchemas fails with the error: "Invalid Uri Format" when trying to load imported schemas.
1-81153	The Account link is greyed out after a Sales Order is promoted via the Submit Accounting Function.
1-81178	An order that was synced from ERP to Sage SalesLogix and includes a discount, does not show the correct tax and grand total in the order snapshot.
1-81190	The Order Number column link exists twice in the Accounting Sales Order real Time Data View tab.
1-81191	Sage1000 - When a commodity is deleted in ERP, both the price and commodity deletion payloads are sent to Sage SalesLogix. However Sage SalesLogix does not appear to process this information and the product can still be used on orders and quotes.
1-81192	Sage1000 - When a unit of measure is deleted the delete information is sent but the unit of measure is still available in the Sage SalesLogix system.
1-81193	Sage1000 - After inserting an additional integration setup, it is necessary to perform an IIS reset.
1-81194	Unable to save Sales Order data after receiving a 500 data error from the pricing service.
1-81209	Editing the Quantity field on the Edit Product view and attempting to save the record without exiting the field results in a blank screen.
1-81215	The opened date is incorrect. For example, the date is 1/04/2011 in Sage SalesLogix and 1/05/2011 in X3.
1-81216	The real time data view data does not change when moving through a list of accounts using the Move Next option.
1-81219	In the Sales Order Details view, the Invoice Lines should be Sales Order Lines.
1-81221	Allow SIF to support import Namespaces in the schema output.
1-81222	Update Sage SalesLogix AdapterBase class to consume the updated schema API which requires additional information in order to create import statements.
1-81227	Not all of the Sales Order feed information displays in the user interface.
1-81239	The date fields within the real time data views do not represent the values found in the S1000 feed.

<b>Defect</b>	<b>Description</b>
1-81240	The Customer Payments real time data view does not load for X3 implementations.
1-81244	Customer Payments view does not display all of the feed information.
1-81248	The first letter in the word of a column header should be capitalized.
1-81250	SIF: Service calls should not contain the BOM preamble.
1-81256	When a quote is synchronized the address type is not passed in the payload, and the billing and shipping are included. On Sales Orders the type is passed.
1-81258	An error appears when selecting the Invoice Lines tab in the X3 Invoice Details view.
1-81259	An error appears when selecting the Sales Order Lines tab in the X3 Sales Order Details view.
1-81273	The Invoice Details view displays different data when compared to the feed.
1-81282	Incorporate the necessary changes for the selection of the real time data view data versus using includes statements for Invoices.
1-81283	Incorporate the necessary changes for the selection of the real time data view data versus using includes statements for Sales Orders.
1-81284	Incorporate the necessary changes for the selection of the real time data view data versus using includes statements for Payments.
1-81289	The SData Sync Engine has an import schema loading issue.
1-81290	On the X3 Accounting Sales Order view, clicking Edit causes a javascript error to display and the link does nothing.
1-81299	The OK and Cancel buttons on the Edit Matching form for all resources are not the same as before.
1-81301	Any failure when applying a tradingAccount or Contact via SData Sync will cause all remaining tradingAccounts or Contacts to fail.
1-81309	When there are multiple end points defined it is not possible to tell which is being viewed when editing matching criteria.
1-81312	Endpoint with lower conflict priority is not winning a conflict.
1-81322	The Sales Order Snapshot details do not automatically update after applying changes from the Pricing Service feed.
1-81325	No entry is being added to the ERPPhoneNumber after adding a new contact to a linked account.
1-81328	Set default for the conflict priority from 1 to 5.
1-81330	UOM values do not appear in the SO Product insert view until it is saved.
1-81336	Setup Accounting Integration title should be Set up Accounting Integration.
1-81337	Address UUID is not set for a new contact added to a linked Account.
1-81338	Contacts added to an UnLinked Account still sync and cause an error.
1-81393	When disabling the flag the UOM still appears in the UOM list while in the Products grid. However if the edit option for the product is opened and the Unit of Measure drop down is examined, the item that was marked as false is not in the list.

## File Information

File Name	File Contents	File Version
SLX_v754_Web_Update01.zip	SLX_v754_Web_Update01.exe	
	SalesLogix v7.5.4 Web Update 01.sxb	
SLX_v754_Web_Update01.exe	ContractSyncTrigger.dll	7.5.4.7099
	Sage.Common.Syndication.dll	1.0.2.196
	Sage.Platform.Deployment.AdminModule.dll	7.5.4.7066
	Sage.Platform.dll	7.5.4.7066
	Sage.Platform.QuickForms.dll	7.5.4.7066
	Sage.Platform.QuickForms.QFControls.dll	7.5.4.7066
	Sage.Platform.VirtualFileSystem.dll	7.5.4.7066
	Sage.Platform.WebPortal.dll	7.5.4.7066
	Sage.SalesLogix.Activity.dll	7.5.4.7066
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7066
	Sage.SalesLogix.QuickForms.QFControls.dll	7.5.4.7066
	Sage.SalesLogix.SyncEngineService.exe	7.5.4.7066
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7066
	Sage.SalesLogix.Web.dll	7.5.4.7066
	Sage SalesLogix v7.5.4 Web Update01 VFS Upgrade.zip	
Sage SalesLogix v7.5.4 Web Update01 VFS Upgrade.zip	Accounting_Systems_Tab.htm	
	AccountingSystems.btnInsert_OnClick.method.xml	
	AccountingSystems.main.quickform.xml	
	AccountingSystems.main.quickform.xml.resx	
	AccountingTasksTasklet.ascx.cs	
	AccountingTasksTasklet.ascx.resx	
	AddEditAccountingSystem.btnTestFeed_OnClick.method.xml	
	AddEditAccountingSystem.cmdOK_OnClick.method.xml	
	AddEditAccountingSystem.main.quickform.xml	
	AddEditAccountingSystem.main.quickform.xml.resx	
	AddEditAccountingSystem.smartpart.xml	
	AddEditAccountingSystem.smartpart.xml.resx	
	Base.Master	
	base.master.resx	
	BaseSDataStore.js	

File Name	File Contents	File Version
	CommonTasksTasklet.ascx.cs	
	CommonTasksTasklet.ascx.resx	
	DateTime.js	
	EditableGrid.js	
	ICAccounting.main.quickform.xml	
	ICAccounting.main.quickform.xml.resx	
	ICCustomerPayments.ascx	
	ICCustomerPayments.js	
	ICEditSalesOrderItem.curMCCalcPrice_OnChange.method.xml	
	ICEditSalesOrderItem.main.quickform.xml	
	ICEditSalesOrderItem.main.quickform.xml.resx	
	ICEditSalesOrderItem.OnLoad1.method.xml	
	ICInvoices.ascx	
	ICInvoices.ascx.resx	
	ICInvoices.js	
	ICSalesOrders.ascx	
	ICSalesOrders.ascx.cs	
	ICSalesOrders.ascx.resx	
	ICSalesOrders.js	
	ICUpdatePricing.ascx.cs	
	Index.xml	
	IntegrationSetup.page.xml	
	IntegrationSetup.page.xml.resx	
	Login.aspx	
	Logoff.aspx	
	Logoff.aspx.resx	
	Lookup.js	
	Matching.ascx	
	Matching_ClientScript.js	
	Matching_Tab.htm	
	NotesHistoryList.ascx.cs	
	NotesHistoryList.js	
	OnAccountChanged.method.xml	
	OnBeforeInsert.method.xml	
	OnBeforeUpdate.method.xml	
	OpportunityProducts.main.quickform.xml	

File Name	File Contents	File Version
	OpportunityProducts.main.quickform.xml.resx	
	PackageKitChildView.PACKAGEKITCHILDVIEW.entity.xml	
	ProdPackageKitView.PRODPACKAGEKITVIEW.entity.xml	
	ProxySDataStore.js	
	QFSDataGrid.WebControlRenderingTemplate.vm	
	QFSDataGrid.WebControlScriptRenderingTemplate.vm	
	QFSLXSDataLookup.WebControlScriptRenderingTemplate .vm	
	Sage.Common.Syndication.dll	1.0.2.196
	Sage.Platform.dll	7.5.4.7066
	Sage.Platform.VirtualFileSystem.dll	7.5.4.7066
	Sage.Platform.WebPortal.dll	7.5.4.7066
	Sage.SalesLogix.Activity.dll	7.5.4.7066
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7066
	Sage.SalesLogix.Client.GroupBuilder.dll	7.5.4.7066
	Sage.SalesLogix.Client.IntegrationContract.Modules.dll	7.5.4.7066
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	7.5.4.7066
	Sage.SalesLogix.Services.Integration.dll	7.5.4.7066
	Sage.SalesLogix.Services.PotentialMatch.dll	7.5.4.7066
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7066
	Sage.SalesLogix.Web.dll	7.5.4.7066
	Sage.SnippetLibrary.CSharp.@.03ece52b-ed84-472f- acc0-1c9e6f421871.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.17fcd96c-11d5-4f93- b3af-dd201789d02c.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.1a2a450c-2d2e-4f15- b619-2ad176aae159.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.242179ed-db6d-4f54- a1d9-c674c0fb4a70.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90- 8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.8ac6a380-7f78-4b08- ae55-c11fe9e2c5bc.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.9a376a3b-c3e8-4115- 90b4-e9d5f9b2a8c5.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.9cf68f6b-e657-4280- a31d-609fb82ddd37.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.d2e2ca0c-bd5f-48a6- 94e8-8658b80c9b77.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.fc60756c-b223-4b69- 9607-a4b7e91fd6b3.codesnippet.cs	

File Name	File Contents	File Version
	sage-controls.js	
	sage-controls-debug.js	
	sage-controls-numeric.js	
	sage-platform.js	
	sage-platform-dashboardworkspace.js	
	sage-platform-debug.js	
	sage-platform-integrationcontractservice.js	
	SalesOrderDetails.btnSaveSalesOrder_OnClick.method.xml	
	SalesOrderDetails.main.quickform.xml	
	SalesOrderDetails.main.quickform.xml.resx	
	SalesOrderDetails.OnLoad1.method.xml	
	SalesOrderProducts.btnAddCustomProduct_OnClick.method.xml	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	
	sdata-client.js	
	sdata-client-debug.js	
	SDataLookup.js	
	SearchResults.ascx.cs	
	SearchResults.js	
	Select_or_Create_Account.htm	
	Setup_Accounting_Integration.htm	
	SlxEndPointDetails.btnSave_OnClick.method.xml	
	SlxEndPointDetails.main.quickform.xml	
	SlxEndPointDetails.main.quickform.xml.resx	
	SLXPreviewGrid.js	
	StepManageDuplicates.ascx.resx	
	Utility.js	
	ValidateEndPoint.method.xml	
	Widgets.resx	
	WritableSDataStore.js	
	WritableStore.js	
SalesLogix v7.5.4 Web Update 01.sxb	Dashboard Widget - System:Default	
	Dashboard Widget - System:Pie Chart	
	Dashboard Widget - System:Today's Activity	

## Applying the Update

Apply the update to all computers where Application Architect and the Web Host have been installed.

- Install the Sage SalesLogix v7.5.4 Web Update 01.sxb bundle using the Sage SalesLogix Administrator.
- Install the Sage SalesLogix v7.5.4 Web Update01 VFS Upgrade.zip using the Sage SalesLogix Application Architect.

If you are using Accounting Integration, apply the update to all computers that have the Sage SalesLogix OLE DB Provider, Admin Tools and Servers, VS Workflow Extensions, Web Host, Web Reporting, Disconnected Web Client, and/or Remote Office installed.

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

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

### To begin the install

1. Close all Sage SalesLogix applications on the computer to which you are applying the update.
2. Extract the contents of the **SLX\_v754\_Web\_Update01.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the update files and double-click **SLX\_v754\_Web\_Update01.exe**.
4. On the **Sage SalesLogix - v7.5.4 Web Update 01** screen:
  - a. Select the **Extract and Install the Sage SalesLogix Update** option.  
The Update files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete.  
Selecting the other option prevents the VFS bundle from being available after the patch is installed, since the files are then deleted.
  - b. Select the location where you want to store the update 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).
  - c. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.
6. On the **Completed** screen, click **Finish**.

## Applying Updates Using the Sage SalesLogix Administrator

Use the Sage SalesLogix Administrator to install the SalesLogix v7.5.4 Web Update 01.sxb bundle.

**Note** Before installing the update bundle, create a bundle of all customized plugins in your database. Sage SalesLogix does not overwrite your customized plugins. However, this bundle can be used as a backup of your customizations.

### To install the bundle

1. Open the **Administrator**.
2. On the **Navigation Bar**, click **Bundles**.
3. Click **Install**.

4. Navigate to the folder where you extracted the update files and double-click the bundle named **SalesLogix v7.5.4 Web Update 01.sxb**.
5. After the bundle is loaded, the Choose Actions to Install dialog box appears. View the plugins to be installed with this release, and then click OK.

## Applying Updates Using the Sage SalesLogix Application Architect

Install the Sage SalesLogix v7.5.4 Web Update01 VFS Upgrade.zip using the Sage SalesLogix Application Architect.

### To install the bundle

1. Ensure you have **Write** permissions to the bundle installation folder. Check permissions 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 update files, click **Sage SalesLogix v7.5.4 Web Update01 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**.

## Building and Deploying the Web Changes

To make your changes available, you must build and deploy the Web portal(s).

### 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.
3. When the build is complete, click **Deployment Explorer** on the **View** menu.
4. Expand **Deployments**.
5. Double-click the portal to deploy.
6. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.  
A status box appears indicating status for the deployment.
7. 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.