

# Applying Web Update 03 for Sage SalesLogix Version 7.5.4

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Version 7.5.4.03

Developed by Sage SalesLogix User Assistance



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<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 7.5.4.03 (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
1-79936	The reminder time change from the default when the Start Date/Time is modified.
1-80869	Unlocalized labels displayed on "Promote to Dashboard" dialog.
1-80890	Lookup Product dialogs are not localized.
1-81443	The default exported file name is not localized.
1-81532	Table & field names are corrupted on layout tab of Query Builder on a Russian Web Client.
11082467	Error occurs when running Mail Merge on a group containing a date field condition. "Unable to run Mail Merge Count. No contacts exist in the selected group."
11082507	Cannot complete merge of duplicate leads in Web Client.
11082630	Browser error when clicking Opportunity Snapshot link to "copy to an e-mail" on French Web Client.
11082671	Some Common Tasks filter labels are corrupted on Secured Actions, Qualifications & Resources list view on Russian Web Client.
11082672	Some Common Tasks labels are NOT localized on Standard Problems & Standard Resolutions page on Russian Web Client.
11082673	Ticket status field is blank if ticket was created from Customer Portal on a localized Web Client.
11082684	On a localized Web Client the Dashboard help links open English help topics.
11082685	Unable to launch the Web Client help on a French localized client.
11082752	E-mails sent during October and recorded to Sage SalesLogix using Send SLX or Record to History record the Scheduled and Completed dates as September.
11082776	Merged Contacts have the source Primary and Shipping Addresses set to TRUE.
11082793	Process Orchestration doesn't recognize or run processes in 7.5.4.

Defect	Description
11082868	Error launching Application Architect Core Service Sage.SalesLogix.Security.FieldLevelSecurityService, Sage.SalesLogix.Security, is not available and is required to run this application.
11082996	Custom Groups with more than 10 conditions cause an error when running a "Count" in Mail Merge.
11083057	Report conditions not saved when using operator of 'Is Not'.
11083058	Override Sales Potential not working correctly within Opportunity Snapshot with multi currency.
11083221	Library folders in Sage SalesLogix Windows Client do not show on a localized Web Client.
11083222	Tickets - The Punch In/Out mechanism doesn't appear to be working properly on localized site.
11083223	The Primary True/False value in the Account Contacts view does not translate in the Web Client.
11083225	Extra radio button appears when a Sales Order Quote is saved on a localized site.
11083729	Web Reporting crashes with a heavy load.
11083759	Error using address labels in mail merge when using custom groups. Failed to retrieve data from the database. Details: [Database Vendor Code: 339411432].
11083778	Error when attempting to promote a group to the dashboard on a localized Web Client.

This update addresses the following Accounting Integration issues:

Defect	Description
1-81102	X3 – ISO date-only string values (e.g. "2011-06-08") are not being recognized as dates.
1-81215	The opened date is not correct. We have the 1/04/2011 in SLX and we have the 1/05/2011 in X3. We will investigate this. I believe this to just be an incorrect setting on the DateTime control.
1-81852	WEB: The SData client library does not process child resources for some ATOM feeds.
1-81861	GlobalSyncId is being overwritten with new GUID for contacts synced from ERP to SalesLogix.
1-81903	Error appears when running the SyncEngineService after installing 7.5.4 update 02 build 7110.
1-82004	No contacts appear when attempting to link 2 records that exist in both Sage SalesLogix and S1000.
1-82053	In order for the IClegacyPhoneEmailUpdater.exe to run, Windows Authentication needs to be configured for the Admin user.
11082133	Synchronization does not log deletions or update rejections from X3.
11082134	When contacts are synchronized between X3 and Sage SalesLogix, they are systematically returned in sync by Sage SalesLogix to X3.

Defect	Description
11082135	E-mail addresses and phone numbers that do not match during Account linking are not synchronized and are deleted during the next synchronization cycle.
11082136	During the linking process, postal addresses that matched don't keep their UUID in Sage SalesLogix.
11082137	Postal addresses that do not match are not synchronized to Sage SalesLogix.
11082371	E-mail address is needed for configuration setup to allow for easier communication.
11082448	Contacts in Sage SalesLogix have an empty address record after the first synchronization with X3.
11082493	Dates in the Accounting Details tab are off by one day compared to the data from X3.
11082583	Excessive INFO logs are written for syncJob.
11082794	Error message appears in the Add Product dialog when adding a new opportunity.
11083765	Accounts from Sage SalesLogix are being resent to X3 after an initial synchronization.

## File Information

File Name	File Contents	File Version
SLX_v754_Web_Update03.zip	SLX_v754_Web_Update03.exe SalesLogix v7.5.4 Web Update 03.sxb	
SLX_v754_Web_Update03.exe	ContactSyncTrigger.dll	7.5.4.7186
	GroupTranslator.dll	7.5.4.7186
	Sage.Integration.Server.dll	1.0.2.200
	Sage.Platform.dll	7.5.4.7097
	Sage.SalesLogix.Activity.dll	7.5.4.7097
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7097
	Sage.SalesLogix.Client.Reports.dll	7.5.4.7097
	Sage.SalesLogix.QuickForms.QFControls.dll	7.5.4.7097
	Sage.SalesLogix.Security.dll	7.5.4.7097
	Sage.SalesLogix.SyncEngineService.exe	7.5.4.7097
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7097
	Sage.SalesLogix.Web.dll	7.5.4.7097
	Sage SalesLogix v754 Web Update03 VFS Upgrade.zip	
Sage SalesLogix v754 Web Update03 VFS Upgrade.zip	Account_Integration_Phone_Email_Utility.htm	
	AccountContacts.main.quickform.xml	

File Name	File Contents	File Version
	AccountContacts.main.quickform.xml.resx	
	AccountDetails.main.quickform.xml	
	AccountDetails.main.quickform.xml.resx	
	Accounting_Integration_Detail_View.htm	
	AddEditAddress.ascx	
	AddEditAddress.ascx.cs	
	AddEditAddress.ascx.resx	
	Address.ADDRESS.entity.xml	
	AddressList.ascx	
	AddressList.ascx.resx	
	Base.Master	
	bundleData.xml	
	CommonTasksTasklet.ascx.cs	
	CommonTasksTasklet.ascx.resx	
	ConditionManager.js	
	ConfiguringAccountingIntegration.htm	
	EditSalesPotential.chkboxOverrideSalesPotential_OnChange.method.xml	
	EditSalesPotential.main.quickform.xml	
	EditSalesPotential.main.quickform.xml.resx	
	ICAccountExtendedDetails.main.quickform.xml	
	ICAccountExtendedDetails.main.quickform.xml.resx	
	InsertAccount.main.quickform.xml	
	InsertAccount.main.quickform.xml.resx	
	InsertTicket.main.quickform.xml	
	InsertTicket.main.quickform.xml.resx	
	manifest.xml	
	Matching.ascx	
	Matching.ascx.cs	
	Matching_ClientScript.js	
	MergeLead.method.xml	
	MergeRecords.ascx.cs	
	ModifiedBy.filter.xml	
	OnAfterInsert.method.xml	
	OpportunityDetails.main.quickform.xml	
	OpportunityDetails.main.quickform.xml.resx	

File Name	File Contents	File Version
	OpportunityDetails.SetupIntegrationContract.method.xml	
	OpportunityProducts.main.quickform.xml	
	OpportunityProducts.main.quickform.xml.resx	
	OpportunitySnapShot.ascx.cs	
	Sage.Integration.Server.dll	1.0.2.200
	Sage.js	
	Sage.js.uncompressed.js	
	Sage.Platform.dll	7.5.4.7097
	Sage.Platform.Process.dll	7.5.4.7097
	Sage.SalesLogix.Activity.dll	7.5.4.7097
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7097
	Sage.SalesLogix.Client.Reports.dll	7.5.4.7097
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	7.5.4.7097
	Sage.SalesLogix.QuickForms.QFControls.dll	7.5.4.7097
	Sage.SalesLogix.SDataSyncEngine.dll	7.5.4.7097
	Sage.SalesLogix.Security.dll	7.5.4.7097
	Sage.SalesLogix.Services.Integration.dll	7.5.4.7097
	Sage.SalesLogix.SyncEngineService.exe	7.5.4.7097
	Sage.SalesLogix.SystemAdapter.dll	7.5.4.7097
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7097
	Sage.SalesLogix.Web.dll	7.5.4.7097
	Sage.SnippetLibrary.CSharp.@.20a2a4bc-a0f1-4853-acb2-e8a6431fb2c3.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.2aeba966-e549-4880-8d72-cd34282dea02.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.fc60756c-b223-4b69-9607-a4b7e91fd6b3.codesnippet.cs	
	Sage_ar.js	
	Sage_ca.js	
	Sage_cs.js	
	Sage_da.js	
	Sage_de.js	
	Sage_de-de.js	
	Sage_el.js	
	Sage_en.js	

File Name	File Contents	File Version
	Sage_en-gb.js	
	Sage_en-us.js	
	Sage_es.js	
	Sage_es-es.js	
	Sage_fi.js	
	Sage_fi-fi.js	
	Sage_fr.js	
	Sage_fr-fr.js	
	Sage_he.js	
	Sage_he-il.js	
	Sage_hu.js	
	Sage_it.js	
	Sage_it-it.js	
	Sage_ja.js	
	Sage_ja-jp.js	
	Sage_ko.js	
	Sage_ko-kr.js	
	Sage_nb.js	
	Sage_nl.js	
	Sage_nl-nl.js	
	Sage_pl.js	
	Sage_pt.js	
	Sage_pt-br.js	
	Sage_pt-pt.js	
	Sage_ROOT.js	
	Sage_ru.js	
	Sage_sk.js	
	Sage_sl.js	
	Sage_sv.js	
	Sage_th.js	
	Sage_tr.js	
	Sage_xx.js	
	Sage_zh.js	
	Sage_zh-cn.js	
	Sage_zh-tw.js	
	sage-controls.js	



File Name	File Contents	File Version
	sage-controls-address.js	
	sage-mailmerge.js	
	sage-mailmerge-debug.js	
	sage-mailmerge-service.js	
	sage-platform-dashboardpage.js	
	sage-platform-dashboardworkspace.js	
	SalesOrderDetails.btnSaveSalesOrder_OnClick.method.xml	
	SalesOrderDetails.main.quickform.xml	
	SalesOrderDetails.main.quickform.xml.resx	
	SalesOrderDetails.OnLoad1.method.xml	
	SearchResults.ascx.cs	
	SearchResults.js	
	Setup_Accounting_Integration.htm	
	SlxDesktopIntegrationSetup.exe	7.54.7186
	SLXWebReporting.aspx	
	TicketDetails.main.quickform.xml	
	TicketDetails.main.quickform.xml.resx	
	Utility.js	
	Web.config	
	WebReporting.dll	7.5.4.7097
SlxDesktopIntegrationSetup.exe	Desktop Manager.chm	
	Lumisoft.Net.dll	2.0.4295.1 9461
	MailMerge.chm	
	Sage.SData.Client.dll	1.3.0.1456
	sagegears.dll	7.5.4.7048
	SLMN.dll	7.5.4.7048
	SlxDesktopManager.exe	7.5.4.7048
	SLXDocW.dll	7.5.4.7048
	SLXFaxW.dll	7.5.4.7048
	SLXFramer.ocx	7.5.4.7048
	SLXMMEngineW.dll	7.5.4.7186
	SLXMMGUIW.dll	7.5.4.7186
	SLXWinFaxW.dll	7.5.4.7048
SalesLogix v7.5.4 Web Update 03.sxb	Plugins <ul style="list-style-type: none"> <li>• Dashboard Page System:My Dashboard</li> <li>• Dashboard Widget System&gt;Welcome</li> </ul>	

## Applying the Update

Prior to installing this update, ensure you have applied all of the following update packages in the order listed:

- 7.5.4 Web Update 01
- 7.5.4 Web Update 02

Apply the update to all computers where Remote Office, disconnected Web Client, Web Reporting, Application Architect and the Web Host have been installed.

- Install the SalesLogix v7.5.4 Web Update 03.sxb bundle using the Sage SalesLogix Administrator.
- Install the Sage SalesLogix v754 Web Update03 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, 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\_Update03.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the update files and double-click **SLX\_v754\_Web\_Update03.exe**.
4. On the **Sage SalesLogix - v7.5.4 Web Update 03** 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 03.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 03.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 v754 Web Update03 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 v754 Web Update03 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.
8. Instruct Web Client and disconnected Wb Client users to download the Desktop Integration Module to get the updated files.  
**Note:** Users must first exit out of the Sage SalesLogix Desktop Manager and Microsoft Outlook before downloading the updated Desktop Integration module.

For more information, click the Find out more link on the Sage SalesLogix Web Client login screen to open the "Installing and Using Sage SalesLogix Desktop Integration" help topic.

## Updating the Matching Criteria Configuration file

If you use Accounting Integration, ensure that the matchingcriteria.xml file is deleted from the Virtual File System so that it will be initialized with new default values.

### To update

1. In the Application Architect, open the Virtual File System Explorer.
2. In the tree view, expand **Configuration** and expand **Global**.
3. If you customized the **MatchingCriteria.xml** file, save it to another location or record any customizations.
4. Delete **MatchingCriteria.xml** and close Application Architect.
5. Reset IIS so that the cached version is removed.
6. If you customized **MatchingCriteria.xml**, reapply your changes by doing the following:
  - a. In the Web Client, on the **Matching** tab of the **Accounting Integration** page, click an **Edit** link.  
Clicking an Edit link creates a new MatchingCriteria.xml file with a set of default matching criteria for each resource.
  - b. Change the matching criteria according to your notes from step 3 and click **Save**.