

Applying Web Update 04 for Sage SalesLogix Version 7.5.4

Version 7.5.4.04

Developed by Sage SalesLogix User Assistance



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Documentation Comments	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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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
11083632	On Client Click ShowDefaultReport() does not work with Remote Web Reporting.
11083669	System Groups needs the ability to add and delete adHoc ID's from a group.
12084541	After merging two contacts, the wrong Account Name displays for the Contact.
12084542	Changing the account owner does not cascade to ERPTRADINGACCOUNT.
12084543	After saving a Contact with three last names, parts of the last names appear in the Middle field and do not display correctly.
12084551	"Object expected" Java Script error message received when navigating between groups.
12085244	SendSLX error "Could not process SendSLX message: an item with the same key has already been added" is returned when 9 or more recipients are in the address fields.
12085351	For Recurring Activity scheduled before DST, the scheduled date changes to a week in advance when completing an instance of the activity after DST change.
12085424	Timeless recurring activity moves back one day after DST change.

This update addresses the following Accounting Integration issues:

Defect	Description
1-82004	No contacts appear when attempting to link two records that exist in both Sage SalesLogix and S1000.
11082137	TradingAccount Linking/Merge - PostalAddresses that do not match are not added to Sage SalesLogix.
11082510	In the function Administration\Integration Setup\Matching, you cannot access any resources via the Edit button. An error appears: Please specify a valid endpoint before continuing.
11083735	Contacts added to an account synced from X3 are not being processed correctly.

Defect	Description
11083812	401 Unauthorized message when attempting to link a record that exists in X3 and Sage SalesLogix.
11084019	Issue with how matching is detecting and adding source and target contacts to the component view.
11084023	Issues with matching IC records. The functionality is not working correctly.
11084039	Sage SalesLogix has two billing and shipping addresses in certain circumstances.
11084112	An incorrect plugin is being installed. The IC Accounting tab should not have an Unlink option available.
11084116	The Order Number link in the Accounting Sales Order grid is not active.
11084129	Deletion of linked X3 phone number records are not being reflected in Sage SalesLogix.
11084169	The account tick is not updated when creating non primary and billing addresses.

File Information106

File Name	File Contents	File Version
SLX_v754_Web_Update04.zip	SLX_v754_Web_Update04.exe	
SLX_v754_Web_Update04.exe	ContactSyncTrigger.dll	7.5.4.7209
	Sage.SalesLogix.Activity.dll	7.5.4.7106
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7106
	Sage.SalesLogix.Security.dll	7.5.4.7106
	SLXCRV.dll	7.5.4.7209
	SLXCRViewer.exe	7.5.4.7209
	Sage SalesLogix v7.5.4 Web Update04 VFS Upgrade.zip	
Sage SalesLogix v7.5.4 Web Update04 VFS Upgrade.zip	AccountingSystems.btnInsert_OnClick.method.xml	
	AccountingSystems.main.quickform.xml	
	AccountingSystems.main.quickform.xml.resx	
	ICAccounting.main.quickform.xml	
	ICAccounting.main.quickform.xml.resx	
	ICSalesOrders.js	
	MergeChildren.ascx.cs	
	MergeRecords.ascx.cs	
	Sage.SalesLogix.Activity.dll	7.5.4.7106
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7106
	Sage.SalesLogix.Client.Reports.Helper.dll	7.5.4.7106
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	7.5.4.7106

File Name	File Contents	File Version
	Sage.SalesLogix.Security.dll	7.5.4.7106
	Sage.SalesLogix.Services.Integration.dll	7.5.4.7106
	Sage.SnippetLibrary.CSharp.@.d2e2ca0c-bd5f-48a6-94e8-8658b80c9b77.codesnippet.cs	
	Sage.SalesLogix.SystemAdapter.dll	7.5.4.7106
	sage-controls.js	
	sage-controls-debug.js	
	sage-controls-group-managerservice.js	
	sage-controls-namepanel.js	
	ShowReportUtil.js	
	SlxDesktopIntegrationSetup.exe	7.54.7209
SlxDesktopIntegrationSetup.exe	Desktop Manager.chm	
	Lumisoft.Net.dll	2.0.4295.19461
	MailMerge.chm	
	Sage.SData.Client.dll	1.3.0.1456
	sagegears.dll	7.5.4.7048
	SLMN.dll	7.5.4.7048
	SlxDesktopManager.exe	7.5.4.7106
	SLXDocW.dll	7.5.4.7048
	SLXFaxW.dll	7.5.4.7048
	SLXFramer.ocx	7.5.4.7048
	SLXMMEngineW.dll	7.5.4.7209
	SLXMMGUIW.dll	7.5.4.7209
	SLXWinFaxW.dll	7.5.4.7048

Applying the Update

This Update affects the following portals:

- Process Host
- SData
- Sage SalesLogix Web Client
- Sage SalesLogix Disconnected Web Client
- Customer Portal
- Intellisync
- Lead Capture
- Web Reporting

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

- 7.5.4 Web Update 03

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 Sage SalesLogix v7.5.4 Web Update04 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_Update04.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the update files and double-click **SLX_v754_Web_Update04.exe**.
4. On the **Sage SalesLogix - v7.5.4 Web Update 04** 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 Application Architect

Install the Sage SalesLogix v7.5.4 Web Update04 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 Update04 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 Web 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**.