

# Applying Web Update 05 for Sage SalesLogix Version 7.5.4

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Version 7.5.4.05

Developed by Sage SalesLogix User Assistance



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## 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 Sage SalesLogix writers at <a href="mailto:saleslogix.techpubs@sage.com">saleslogix.techpubs@sage.com</a> .
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This document describes Web Update 05 for Sage SalesLogix version 7.5.4.

## Prerequisites

Prior to installing this Web 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
- 7.5.4 Web Update 04



Do not install Update 05 for Sage SalesLogix 7.5.4 on any other Sage SalesLogix version.

## Accessing Sage SalesLogix v7.5.4 Updates

This and other updates are available through your support representative or the Sage Support Portal Web sites.

### To access the Support portals

1. Use one of the following URLs to access a portal:
  - For partners: [partners.sagenorthamerica.com](http://partners.sagenorthamerica.com).
  - For customers: [customers.sagenorthamerica.com](http://customers.sagenorthamerica.com).
2. Browse to **Knowledgebase**, and click either **For Customers** or **For Partners**.
3. Click **Sage SalesLogix**, **Sage SalesLogix (version number)**, **General Downloads**.

## Issues Fixed in This Update

Web Update 05 for Sage SalesLogix version 7.5.4 addresses the following issues:

Defect	Description
1-80891	In a localized environment, a bad layout occurs on the "My Dashboard" page after promoting records to the dashboard.
1-81151	In a localized environment, the terms Type and Status are not translated in Account Lookup dialogs.
1-81417	The Hidden tab name is no longer localized when it displays in Show page.
11084028	Sending an e-mail using the Copy to E-mail option in the Opportunity Snapshot generates errors in Outlook 2010.
12085417	In the Activity list view, occurrences of recurring activities show an hour difference during Standard Time months versus Daylight Savings Time months.

Defect	Description
12086346	The HandleException method in Sage.Platform.Application.UI.Web.ApplicationPage is no longer redirecting users to Login.aspx when an ArgumentNullException is associated with an authToken (failed authorization).
12086516	In the Sage SalesLogix Web Client, completing Timeless Recurring Activities generates an error.
12086794	The Desktop Manager stops working when more than one user tries to access it through Terminal Services.
12087096	Percentage format is not functioning for list views/groups.
12087097	Password change on a disconnected Web Client does not sync from remote to host.
12087098	Query Builder returns incorrect data for 'createdate "within last xxx days" value = 0'.
12087099	An HttpUnhandledException error is generated when viewing What's New from the disconnected Web Client under specific conditions.
12087103	Selecting, editing, and then deleting an Account Asset not on page 1 causes the first Account Asset listed on the Assets tab to be deleted.
12087118	In the Sage SalesLogix Web Client, when the text must match list item is enabled users can still edit the picklist.
12087119	Several anomalies appear when the Dashboard chart uses the 'Average days since last activity' metric.
12087125	Timeless activities appear as a day earlier than the set date with specific date and time settings.
12087201	An "Object Required" error message occurs when the Ticket Tab is in view or in the middle pane.
12087511	Remote changes to memo fields are reset by the host when memo changes also include a change to the modifydate.
12087695	Multi-Day Events created in Outlook are shortened by a day in Outlook only after Intellisync runs a second time.

This update addresses the following Accounting Integration issues:

Defect	Description
11084105	Products are not being deleted from Sage SalesLogix after being removed from X3.
12084524	Changes to Primary Billing and Shipping addresses are not reflected in X3.
12087042	The SalesLogix adapter needs to be changed to check for errors coming from the Sync Source before applying changes to the Sync Target.
12087285	Remove error messages from the Windows Event Viewer and add a fix to ensure that the sync engine completes the cycle without stopping.
12087550	The Edit Link option does not work when selected from within the Accounting Sales Order grid.
12087708	The SData grid fails to load any records when the feed does not contain TotalResults.

## File Information

File Name	File Contents	File Version
SLX_754_Web_Update05.zip	SLX_754_Web_Update05.exe	
	SalesLogix v7.5.4 Web Update 05.sxb	
SLX_754_Web_Update05.exe	Sage.Platform.Application.UI.Web.dll	7.5.4.7129
	Sage.Platform.dll	7.5.4.7129
	Sage.Platform.WebPortal.dll	7.5.4.7129
	Sage.SalesLogix.Activity.dll	7.5.4.7129
	Sage.SalesLogix.LegacyBridge.dll	7.5.4.7129
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7129
	Sage.SalesLogix.Web.dll	7.5.4.7129
	SLXLoggingObj2.dll	7.5.4.7226
	SLXLoggingServer.exe	7.5.4.7226
	SyncClient.exe	7.5.4.7226
	SyncServer.exe	7.5.4.7226
	Sage SalesLogix v7.5.4 Web Update05 VFS Upgrade.zip	
Sage SalesLogix v7.5.4 Web Update05 VFS Upgrade.zip	ActivityViewer.ascx	
	AverageDaysSinceLastActivity.filter.xml	
	BaseSDataStore.js	
	ICCustomerPayments.ascx	
	ICInvoices.ascx	
	ICSalesOrders.ascx	
	Interop.SlxLoggingObj2.dll	7.5.4.7218
	Sage.Integration.Web.dll	1.0.4.216
	Sage.js	
	Sage.js.uncompressed.js	
	Sage.Platform.Application.UI.Web.dll	7.5.4.7129
	Sage.Platform.dll	7.5.4.7129
	Sage.Platform.WebPortal.dll	7.5.4.7129
	Sage.SalesLogix.Activity.dll	7.5.4.7129
	Sage.SalesLogix.Client.GroupBuilder.dll	7.5.4.7129
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	7.5.4.7129
	Sage.SalesLogix.Intellisync.Entity.dll	7.5.4.7129
	Sage.SalesLogix.LegacyBridge.dll	7.5.4.7129
	Sage.SalesLogix.ProxyAdapter.dll	7.5.4.7129
	Sage.SalesLogix.Services.Integration.dll	7.5.4.7129
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7129

File Name	File Contents	File Version
	Sage.SalesLogix.Web.dll	7.5.4.7129
	Sage.SalesLogix.WebUserOptions.dll	7.5.4.7129
	Sage.SnippetLibrary.CSharp.@6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@fc60756c-b223-4b69-9607-a4b7e91fd6b3.codesnippet.cs	
	sage-controls.js	
	sage-controls-debug.js	
	sage-controls-listpanel.js	
	sage-controls-picklist.js	
	sage-platform.js	
	sage-platform-dashboardpage.js	
	sage-platform-debug.js	
	SalesOrderDetails.btnSaveSalesOrder_OnClick.method.xml	
	SalesOrderDetails.main.quickform.xml	
	SalesOrderDetails.main.quickform.xml.resx	
	SalesOrderDetails.OnLoad1.method.xml	
	SlxDesktopIntegrationSetup.exe	7.54.7226
	TicketDetails.main.quickform.xml	
	TicketDetails.main.quickform.xml.resx	
	Utility.js	
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	7.5.4.7129
	SLXDocW.dll	7.5.4.7048
	SLXFaxW.dll	7.5.4.7048
	SLXFramer.ocx	7.5.4.7048
	SLXMMEngineW.dll	7.5.4.7226
	SLXMMGUIW.dll	7.5.4.7226
	SLXWinFaxW.dll	7.5.4.7048
SalesLogix v7.5.4 Web Update 05.sxb	Dashboard Widget System:Pie Chart	

## 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

Apply the Update to all computers where the Application Architect, Disconnected Web Client, Synchronization Server, and Remote Office is installed.

- Install the Sage SalesLogix v7.5.4 Web Update05 VFS Upgrade.zip bundle using the Application Architect, and then build and deploy your Web site(s).
- Install the SalesLogix v7.5.4 Web Update 05.sxb bundle using the Sage SalesLogix Administrator.

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.

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\_754\_Web\_Update05.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **SLX\_754\_Web\_Update05.exe**.
4. On the **Sage SalesLogix- v7.5.4 Web Update 05** 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. Click **Change** to select the location where you want to store the update files.
 

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).
5. On the **Welcome** screen, click **Install** to install the patch.
6. On the **Completed** screen, click **Finish**.

## Installing the Bundle Using the Sage SalesLogix Administrator

Use the Sage SalesLogix Administrator to install the SalesLogix v7.5.4 Web Update 05.sxb bundle.



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 05.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**.
6. During installation, click **Yes** or **Yes to All** on any confirmation message boxes for overwriting system plugins.
7. In the **Choose Teams** dialog box, select the teams to which you want to release plugins, and then click **OK**.

## Installing the VFS Bundle Using the Sage SalesLogix Application Architect

Install the Sage SalesLogix v7.5.4 Web Update05 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 Update05 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.
  -  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.
  -  Users must first close 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 can 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**.

## Configuring Endpoints

Accounting Integration is enabled when the Sage SalesLogix endpoint and at least one target endpoint is configured and enabled. At least one endpoint must be active to share data between Sage SalesLogix and your accounting system. In implementations where the endpoint includes the default port (port 80), issues with the Sync Server stripping the default port number from the URL have arisen, causing error messages. To avoid this, verify that your SData URL omits the port number if the default port is used.

### To set

1. On the Web Client **Administration** menu, click **Integration Setup**.
2. In the **SalesLogix Feed** box, type the SData URL that Sage SalesLogix uses to share information between systems. Use the format:  
http://server:port/sdatavirtualdir/application/ contract/operatingcompany
  - Set application to slx.
  - Set contract to gcrm.
  - Set operatingcompany to - (Sage SalesLogix does not have an operating company).
3. In the **User Name** box, type the user name for the Sage SalesLogix database that the accounting system connects to.

4. In the **Password** box, type the password for the user name.
5. In the **Display Name** box, type the display name for the feed.
6. Click **Save**.
7. If necessary, select the **Restrict account promotion to single accounting system** option to limit your integration to Sage SalesLogix and one accounting system.
8. Click the **Accounting Systems** tab to configure the feed details for your accounting system(s).
9. Click **Add**.
10. Set the following values in the **Setup Accounting Integration** dialog box.

Box	Description/Action
Accounting Feed	Type the SData URL to the accounting system. Use the format: <code>http://server:port/sdatavirtualdir/application/contract/operatingcompany</code> <ul style="list-style-type: none"> <li>• Set application to your accounting application name. For example, Sage1000.</li> <li>• Set contract to gcrm.</li> <li>• Set operatingcompany to the operating company in your accounting application that you are integrating with.</li> </ul>
User Name	Type the user name used to log on to the account system.
Password	Type the password for the corresponding user name.
Test Feed	Click to test and display the connection status.
Display Name	Type a display name for the accounting system. This name displays in the Web Client when users are linking records between Sage SalesLogix and the accounting system.
Enable Synchronization, Linking and Transacting	Select to enable this feed.
Filter by Resource	Select a resource type and click the Execute button to display schema differences in the grid. This feature compares the schema for the selected resource in the two integrated systems and returns any differences in string lengths. If string values do not match, use the Database Manager or other application to modify the schema in one of the systems.

11. Click **OK**.