

# Applying Update 06 for Sage SalesLogix Version 7.5.4

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Version 7.5.4.06

Developed by Sage SalesLogix User Assistance



# Applying Web Update 06 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 Sage SalesLogix writers at saleslogix.techpubs@sage.com.
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This document describes Web Update 06 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
- 7.5.4 Web Update 05



Do not install Web Update 06 for Sage SalesLogix 7.5.4 on any other Sage SalesLogix version.

- 7.5.4 Update 17 is only needed in environments with Synchronization. This Update can be added before or after Web Update 06 has been applied.

## 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](https://partners.sagenorthamerica.com).
  - For customers: [customers.sagenorthamerica.com](https://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 06 for Sage SalesLogix version 7.5.4 addresses the following issues:

Defect	Description
1-76742	In the Sage SalesLogix Web Client, on the Products and Packages main view, ModifiedBy and ModifyUser labels will not translate.
1-80900	In the Sage SalesLogix Web Client, on the Activities List view Literature tab, the Account label in the Common Tasks pane is not localized.
11083989	Editing an Opportunity Sales Potential causes an error.
12087894	In the Sage SalesLogix Web Administrator, creating Library directories places all folders at the root level instead of in sub-directories.
12088301	After applying Web Update 05, Add Opportunity Products displays a blank page and products cannot be added.
12088412	In the Sage SalesLogix Web Client, creating a Contact group with certain conditions produces a "1 - NaN of" error message.
12088439	In the Sage SalesLogix Web Administrator, the wrong user is removed from the Department when removing a user on the second page of the Member's tab.
12088440	In the Sage SalesLogix Web Client, selecting an asset and clicking Delete removes the wrong asset.
12088629	In the Opportunity Products grid, if the Adjusted Price column is set to show four decimal places, it displays differently in the Web Client than in the Sage SalesLogix Client.
12089102	In Firefox 3.6.3 with Windows Authentication enabled, an error occurs when using the Mail Merge menu.
12089670	Clearing the "Override calculated sales potential" option from the Opportunity Snapshot does not recalculate Opportunity Snapshot based upon the value of the products.
12089671	Selecting the "Override calculated sales potential" option from the Opportunity Snapshot and editing a product resets the calculations in the snapshot grid to 0.00.
12089770	When an SData endpoint uses the upper function, NHibernate is unable to infer the correct string type (Unicode vs ANSI) and defaults to NVARCHAR even if that datatype is not in use in the database.
12089818	With Multicurrency is enabled, the Adj Price field goes blank when focus is placed in the field.
12089822	When using the Sage SalesLogix disconnected Web Client, conflict resolution is not being applied correctly creating mismatched Opportunity statuses.
12090874	Editing the title of a dashboard tab creates a duplicate tab that users are unable to remove.
12090875	Completing an Activity causes an error.
12090876	Processing a Mail Merge causes a "Could not process SendSLX Message" error.

Defect	Description
12090878	Clearing the "Enable Automatic Logoff" in Sage SalesLogix Web Client user options allows users to edit Default Owner/Team.
12090879	In the Sage SalesLogixWeb Administrator, admin is unable to save setting after clearing the "Allow users to change these settings" check box.
12090880	Merging a Lead during a conversion causes an error dialog box with no message to display.
12090881	Tabbing into a numeric control does not allow users to enter information until they click inside the field.
12090882	Looking up a lead source from the Campaign Details screen returns all results at once.
12090883	Adding a large number of contacts to a Campaign in the Sage SalesLogix Web Client causes an error, "The server request timed out."
12090884	Completing recurring activities in a specific order causes activities to disappear and an erroneous activity to be added.
12090888	Pressing the Enter key while editing any value in the Product editable grid causes erratic behavior.
12090964	When attempting to update a list of more than 4500 targets' Status to Responded, a server time out error occurs.
12090994	When scheduling activities and values are changed on the Recurring tab, the dates revert back to previous values.
12090995	An activity that is timeless and scheduled to reoccur monthly cannot be completed when an occurrence is scheduled for 1/1/2013.
12090996	Unable to complete an initial instance of a monthly recurring activity.

This update addresses the following Accounting Integration issues:

Defect	Description
12087987	Add additional error checking for the Edit Link within the Sales Order Real Time Data View (RTDV).
12088284	The Due Date column should not exist on Invoice RTDV.
12088476	The focus on a RTDV is lost when saving a changed account record.
12088853	Request poll interval cannot be changed for the Sage SalesLogix SyncEngine.
12089181	Trading Account Postal Address feeds do not contain the DeleteMissing attribute.
12090000	Records should not be merged after an Account has been promoted.
12090177	When a trading account without an address is synchronized to Sage SalesLogix, the Address GlobalSyncId in not added to the default address in Sage SalesLogix.
12090217	ERPTradingAccount table does not contain fields for Reference properties.
12090443	ICLegacyPhoneEmailUpdater help topic not visible from within the Help system.

Defect	Description
12090609	Unable to apply account changes from X3 into Sage SalesLogix
12090904	In an Accounting Integration environment, an error occurs when attempting to merge two matching records.

## File Information

File Name	File Contents	File Version
SLX_754_Web_Update06.zip	SLX_754_Web_Update06.exe	
	SalesLogix v7.5.4 Web Update 06.sxb	
	copy_slx_ent_files.bat	
SLX_754_Web_Update06.exe	ContractSyncTrigger.dll	7.5.4.7261
	Sage.Entity.Interfaces.dll	7.5.4.7261
	Sage.Platform.dll	7.5.4.7144
	Sage.Platform.WebPortal.dll	7.5.4.7144
	Sage.SalesLogix.Activity.dll	7.5.4.7144
	Sage.SalesLogix.Activity.Entities.dll	7.5.4.7261
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7144
	Sage.SalesLogix.ContractSync.Entities.dll	7.5.4.7261
	Sage.SalesLogix.dll	7.5.4.7144
	Sage.SalesLogix.Entities.dll	7.5.4.7261
	Sage.SalesLogix.QuickForms.QFControls.dll	7.5.4.7144
	Sage.SalesLogix.Security.dll	7.5.4.7144
	Sage.SalesLogix.Security.Entities.dll	7.5.4.7261
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7144
	Sage.SalesLogix.Web.dll	7.5.4.7144
	SyncServer.exe	7.5.4.7261
	Sage SalesLogix v7.5.4 Web Update06 VFS Upgrade.zip	
Sage SalesLogix v7.5.4 Web Update06 VFS Upgrade.zip	Account.filter.xml	
	ActivityViewer.aspx	
	AddEditAccountingSystem.cmdOK_OnClick.method.xml	
	AddEditAccountingSystem.main.quickform.xml	

File Name	File Contents	File Version
	AddEditAccountingSystem. main.quickform.xml.resx	
	bundleData.xml	
	CurrencyTextBox.js	
	Default-Mapping- SalesLogix.Mapping.codetemplate.xml	
	EditSalesPotential.chkboxOverrideSalesPotential_ OnChange.method.xml	
	EditSalesPotential.main.quickform.xml	
	EditSalesPotential.main.quickform.xml.resx	
	ICInvoices.ascx	
	ICInvoices.ascx.resx	
	ICInvoices.js	
	ICSalesOrders.ascx	
	ICSalesOrders.ascx.resx	
	ICSalesOrders.js	
	Index.js	
	Index.xml	
	manafest.xml	
	ManageTargets.ascx.cs	
	ManageTargets_ClientScript.js	
	ModifiedBy.filter.xml	
	Numeric.js	
	OpportunityProducts.main.quickform.xml	
	OpportunityProducts.main.quickform.xml.resx	
	QFSLXLookup.WebControlRenderingTemplate.vm	
	RecurringActivity.ascx.cs	
	Sage.js	
	Sage.js.uncompressed.js	
	Sage.Platform.dll	7.5.4.7144
	Sage.Platform.WebPortal.dll	7.5.4.7144
	Sage.SalesLogix.Activity.dll	7.5.4.7144
	Sage.SalesLogix.BusinessRules.dll	7.5.4.7144
	Sage.SalesLogix.Client.GroupBuilder.dll	7.5.4.7144
	Sage.SalesLogix.dll	7.5.4.7144
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	7.5.4.7144
	Sage.SalesLogix.Security.dll	7.5.4.7144
	Sage.SalesLogix.Services.Integration.dll	7.5.4.7144

File Name	File Contents	File Version
	Sage.SalesLogix.Services.PotentialMatch.dll	7.5.4.7144
	Sage.SalesLogix.Web.Controls.dll	7.5.4.7144
	Sage.SalesLogix.Web.dll	7.5.4.7144
	Sage.SalesLogix.WebUserOptions.dll	7.5.4.7144
	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.@.2aeba966-e549-4880-8d72-cd34282dea02.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	
	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	



File Name	File Contents	File Version
	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	
	sage-controls-debug.js	
	sage-controls-lookup.js	
	sage-control-numeric.js	
	SalesOrderProducts.btnAddCustomProduct_OnClick.method.xml	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	
	SlxDesktopIntegrationSetup.exe	7.54.7261
	Toc.js	
	Toc.xml	
	UpdateTargets.ascx.cs	
	UserClientSystem.ascx	
	UserClientSystem.ascx.cs	
SlxDesktop-IntegrationSetup.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

File Name	File Contents	File Version
	SlxDesktopManager.exe	7.5.4.7144
	SLXDocW.dll	7.5.4.7048
	SLXFaxW.dll	7.5.4.7048
	SLXFramer.ocx	7.5.4.7048
	SLXMMEngineW.dll	7.5.4.7261
	SLXMMGUIW.dll	7.5.4.7261
	SLXWinFaxW.dll	7.5.4.7048
SalesLogix v7.5.4 Web Update 06.sxb	Create Field (Reference1) on Table (ErpTradingAccount)	
	Create Field (Reference2) on Table (ErpTradingAccount)	

## Applying the Update

This Web Update affects the following portals:

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

Install this Update to all computers where the following components are installed:

- Application Architect
- Web Host
- Synchronization Server
- Desktop Integration



Install the SalesLogix v7.5.4 Web Update 06.sxb bundle using the Sage SalesLogix Administrator.


Install the Sage SalesLogix v7.5.4 Web Update06 VFS Upgrade.zip bundle using the Application Architect, and then build and deploy your Web site(s).

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\_Update06.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **SLX\_754\_Web\_Update06.exe**.
4. On the **Sage SalesLogix- v7.5.4 Web Update 06** screen select one of the following:
  - 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. Click **Next**.
6. On the **Welcome** screen, click **Install** to install the patch.
7. 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 06.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 06.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 Update06 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 Update06 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**.

### Installing Files for Accounting Integration

You must manually install files to update Accounting Integration.

1. Open the **Project Explorer**.
2. Expand **Entity Model > Packages > Saleslogix Contract Sync Entities**.
3. Right-click **AppIDMapping** and select **Open Selected**.
4. On the **Edit Properties** table, in the **Password** row, click the **Text** hyperlink.
5. In the **System Data Type Editor** window, change the **Is Encrypted** property to **False**.
6. Click **OK**.
7. Click **Save**.
8. On the **Build** menu, select **Build Web Platform**.
9. Close the Application Architect.
10. Browse to the folder where you extracted the Update files.
11. Copy the **copy\_slx\_ent\_files.bat** file to the local machine.
12. If the Web site is not deployed to the default location, the copy\_slx\_ent\_files.bat must be modified.
  - a. In the Application Architect click on **Tools** menu, click **Build Settings**.
  - b. Copy the **Build Path** value.
  - c. Open the **copy\_slx\_ent\_files.bat** in a text editor such as Notepad.
  - d. Set the **buildPath** value to the value in the Application Architect.
13. Run the copy\_slx\_ent\_files.bat from a command window.



If Accounting Integration has already been configured, after applying the fix you must re-add the password for the user used to log on to the accounting system and restart the Sage SalesLogix Cache Service and the SalesLogix SData Sync Service.

## 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, on the **View** menu, click **Deployment Explorer**.
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.

## Finding Script Changes

Changes to Sage SalesLogix scripts, and scripts on forms, can be researched using a third-party comparison utility such as Beyond Compare or Microsoft Word. You can use the following example procedure to determine the Sage SalesLogix script changes in this release. Then, use that information to update your custom scripts with the Sage SalesLogix changes, or add your customizations to the Sage SalesLogix script.

### To find script changes

1. Apply the upgrade bundle to a test environment.
2. Open the original version of the script or form you want to research in the **Architect**.
3. Right-click the script, and then click **Select All**.
4. Copy and paste the information to a text editor, such as **WordPad**.
5. Save the script with the version number in the name.
6. Repeat steps 2 - 5 for the same plugin updated in this release.
7. Open the original plugin version in **Microsoft Word** (saved in step 5).
8. On the **Tools** menu, click **Compare and Merge Documents**.
9. Browse to and select the updated plugin (saved in step 6) and click **Merge**.
10. View the code changes and determine how to merge the Sage SalesLogix changes with your customizations.

## 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**.