Applying Hot Fix 30 for Sage SalesLogix Version 7.5.1

Version 7.5.1.30

Developed by Sage SalesLogix User Assistance

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This hot fix addresses the following issues:

Defect	Description
1-68409	If a client is deployed to a virtual and physical directory other than SLXClient, then Mail Merge and SendSLX return errors.
1-68479	Web: New columns added in group layout are not exported to Excel.
1-69273	Web: Export to Excel does not use the selected group name.
1-69274	Web: The default extension for Export to Excel file is .xlt (should be .xls).
1-69965	Web: Edit Activity pop-up windows in the web client pegs CPU at 100% when opened from the activity tab in the account or contact detail view
1-70157	Mail merge takes 4 minutes to load on Web server with 64-bit OS.
1-70199	Filters do not work as expected when an entity name includes an underscore.
1-70201	Filters do not work with fields when the fieldname contains underscores.
1-70274	Filters return an error when selected against any group with a very large number of records.
1-70314	Mail Merge slows when the database contains a large number of groups.
1-70378	Users kicked out randomly with an "Out of Memory" error.
1-70436	Error occurs when filter name is clicked: "A script on this page is causing Internet Explorer to run slowly."
1-70437	Error occurs when changing between groups and filters.
1-70483	City filter for Leads does not work.
1-70514	Words appear to overlap, or become unreadable, in the Confirmation filter.
1-70662	WEB: Entities based on table names with an underscore break filter functionality.

This hot fix requires version 7.5.1 and 7.5.1 Hot Fix 6. Do not install this hot fix on any other Sage SalesLogix version. Contact your support representative or go to http://support.saleslogix.com to obtain the hot fix.

File Information

File Name	File Contents
SLX_v751_HF30.zip	Sage SalesLogix v7.5.1 HF30 VFS Upgrade.zip

File Name	File Contents
Sage SalesLogix v7.5.1 HF30 VFS Upgrade.zip	ActivityFilters.ascx.cs, Filters.ascx, Filters.ascx.cs, Filters.css, groupmanager.js, MailMerge.vbs, Sage.SalesLogix.Client.GroupBuilder.dll, Sage.SalesLogix.Client.MailMerge.dll

Applying the Hot Fix

Ensure you have applied 7.5.1 Hot Fix 6 first. Then, apply the 7.5.1 Hot Fix 30 bundle to all computers with Application Architect installed, and then build and deploy the Web site(s).

This hot fix affects the Customer Portal and the SLXClient. All affected portals should be redeployed.

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

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

    The following instructions describe the latter option; applying the bundle.

To install the bundle

1. Copy **SLX_v751_HF30.zip** to your local machine and unzip it.

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).

2. Ensure you have **Write** permissions to the bundle installation folder.

    Check permisisons on the Security tab in the folder properties.

3. Open the **Application Architect**.

4. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.

5. Browse to the **Sage SalesLogix v7.5.1 HF30 VFS Upgrade.zip** bundle you copied to the local machine, and then click **Open**.

6. On the **Select Bundle** screen, click **Next**.

7. On the **Select Items** screen, ensure the **Portals** option is selected.

8. Click **Next**, and then click **Finish**.

To build and deploy the Web site

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. 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.

    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.

7. Repeat these steps for the each of the portals.

Using Best Practices with Filters

The best practice for using filters, especially with large numbers of records, is to reduce the number of records to filter. You can do this using distinct and range filters, using a lookup filter, or using combinations of these.

The filters available in the list view vary depending on the type of record you are viewing, and the layout of the current group (the columns in the records).

To use the lookup filter, you must change the filter type in the Application Architect from Distinct or Range, to User Lookup. When you do this, a text box displays in place of the filter options.

For example, say you changed the City filter to a User Lookup, when you expand the City filter, a text box displays instead of a list of cities. Type the specific text you're looking for into the text box and the records are filtered by the text you typed. For example, type Chicago, to filter on all records with the city of Chicago. If necessary, you can use other available filters in combination with the User Lookup.

The following table provides filtering examples using the default distinct filters.

End Result	Filter 1st	Filter 2nd	Filter 3rd
To find all records with city of Chicago	State: Illinois	City: Chicago	
To find all the Active Leads for the Northeast Sales team	Owner: Northeast	Type: Lead	Status: Active
To find all records matching Inactive Partner Resellers	Status: Inactive	Type: Partner	Subtype: Reseller

The following table provides an example using a combination of a default range filter and distinct filters.

End Result	Filter 1st	Filter 2nd	Filter 3rd
To find all opportunities with $100k+ potential in the negotiation stage with an end of year estimated close date.	Potential: 100,000 to 499,999	Stage: Negotiation	Estimated Close: December 2009

Note The filters in your implementation may vary based on customizations.