

Applying Service Pack 1 for Sage CRM SalesLogix Version 7.0

Version 7.0.1

Developed by Sage CRM SalesLogix Technical Publications



Your business in mind.

Applying Service Pack 1 for Sage CRM SalesLogix Version 7.0

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Contents

Introduction	1
Requirements	1
About This Document	1
Chapter 1 Upgrade Workplan	3
Prepare to Upgrade	3
Protect Your Customizations	4
Prepare Your SalesLogix Database	5
Upgrade your Main Office	7
Install the Service Pack Bundles	8
Upgrade your Customizations	9
Upgrade Synchronization	9
Upgrade SalesLogix Network Users	10
Upgrade SalesLogix Remote Users/Offices	10
Upgrade Web Components (if applicable)	10
Perform Post-Upgrade Tasks	11
Chapter 2 Changes in this Release	13
Changes to Existing Forms	13
Changes to Existing Global Scripts	16
Changes to Existing Scripts	16
Changes to Standard Menus	17
Changes to Existing Pick Lists	17
Changes to Existing Groups	17

Introduction

This document provides instructions for upgrading the Sage CRM SalesLogix Network and Web components to Sage CRM SalesLogix version 7.0 Service Pack 1. Release 7.0.1 includes defect fixes and support for Office 2007 and Microsoft Internet Explorer 7.0. This service pack also ensures compatibility for Sage CRM SalesLogix version 7.0.1 after installing the Microsoft Windows KB928388 update (2007 Time Zone update).

Requirements

Before upgrading to version 7.0.1, you must:

- Ensure your current Sage CRM SalesLogix version is 7.0 or later.
- Create a database backup. Even if you back up every night, do another backup before this installation to preserve any last-minute changes. Then, verify that your backup completed successfully and that you can restore from it, if necessary.

About This Document

[Chapter 2, "Changes in this Release"](#) outlines the plugin changes from Sage CRM SalesLogix v7.0 to Service Pack 1. Use the Upgrade Workplan included in this document to guide your upgrade process.

If you have not upgraded to Sage CRM SalesLogix v7.0, refer to the following documents on the SupportOnline/Sage Online Support and Services Web site (<http://support.saleslogix.com>) to upgrade.

- [Upgrading Sage CRM SalesLogix from Version 5.2.x to 7.0.pdf](#)
- [Upgrading Sage CRM SalesLogix from Version 6.0.x or 6.1.x to 7.0.pdf](#)
- [Upgrading Sage CRM SalesLogix from Version 6.2.x to 7.0.pdf](#)

After upgrading, see the "What's New in this Release" topic in the online Help systems for an explanation of the new features.

Chapter 1

Upgrade Workplan

Use this workplan to upgrade from Sage CRM SalesLogix v7.0 to v7.0 Service Pack 1. Follow the tasks in order. If a task does not apply, disregard it and move on to the next.

✓	Task Description	Notes
Prepare to Upgrade		
1	Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.	
2	Install v7.0.1 in a test environment before installing on your production database. Note Refer to SupportOnline\Sage Online Support and Services Knowledge Base. Search for "creating a test environment" for information on using a copy of your production database in a test environment.	
3	Understand the Service Pack bundle extraction process.	
<p>Task 3 Details</p> <p>Depending on the installation method you choose while running the 7.0.1 service pack, bundles may or may not be extracted to your local computer.</p> <ul style="list-style-type: none"> • If you install the service pack from a temporary folder without extracting all the contents to your local computer, the bundles remain in the .zip file and you must browse to the bundles when you are ready to install them. • If you choose to extract the files and then install the service pack from your local computer, the bundles are included in the extraction process and can be found on your local computer when you are ready to install them. <p>Ensure you select the appropriate installation method when completing Task 20.</p>		

✓	Task Description	Notes
	<p>4 Understand the changes in this release.</p> <p>Task 4 Details</p> <p>In addition to defect fixes, v7.0.1 contains the following new functionality:</p> <ul style="list-style-type: none"> • Support for Microsoft Office 2007. If you are running Office 2007, you must have Microsoft XP Service Pack 2 or later or Windows 2003 Server or later. • Support for Internet Explorer 7.0. • Support for Microsoft Office 2000 has been discontinued. • The Import Wizard scripting object supports new functions and methods. See the Import Wizard Help for more information. • Ensures compatibility between SalesLogix and Microsoft Windows after installing the Microsoft Windows KB928388 update (2007 Time Zone update). See Task 19 for details. <p>*** Important ***</p> <p>The service pack bundle contains the Sales Order Status and Sales Order Type pick lists. If you install these pick lists with the service pack bundle, your existing customizations will be overwritten. If you have customized the Sales Order Status or Sales Order Type pick lists, do not install the 7.0.1 version of these plugins. See Task 25 for details.</p> <p>Discontinued Support for the SpeedSearch Procedure Index</p> <p>If your database originated as a version earlier than 7.0 and you do not have the SpeedSearch Advanced license, any information currently accessed using the Procedure index will be unavailable after applying the service pack. The service pack bundle disables the Procedure index.</p> <p>If your implementation contains the SpeedSearch Advanced license, you can enable the index after upgrading (see Task 43).</p> <p>Do not apply this service pack if your implementation contains the SpeedSearch Standard license and you want to continue to run SpeedSearch against the Procedure index.</p>	
Protect Your Customizations		
	<p>5 (Optional) Record your customizations and use Architect to create a bundle of all customized plugins in your database.</p> <p>Note With the exception of the Sales Order Status and Sales Order Type pick lists, SalesLogix does not overwrite your customized plugins with the v7.0.1 plugins. However, this bundle can be used as a backup of your customizations.</p>	
	<p>6 Review the v7.0.1 plugin changes to determine if you have customized any plugins that are updated in this release.</p> <p>Task 6 Details</p> <p>Plugin changes are listed by type (form, script, and so on) and then alphabetically by plugin name within the type. The service pack bundle includes all plugin changes.</p> <p>Review Chapter 2, "Changes in this Release" for all plugin changes.</p>	

✓	Task Description	Notes
	<p>7 After reviewing the plugin changes, determine if you are going to add your customizations to the v7.0.1 plugins (recommended) or add the SalesLogix changes to your custom plugins.</p> <p>Note Some of the views and scripts in the bundles have had localization functions applied to them, but are otherwise unchanged. If you have customized these plugins, and you do not plan to localize SalesLogix in the future, you can choose not to retrofit your existing plugins with the localization changes.</p>	
	<p>8 If you have customized any of the Web components in a separate package, locate the package folder and make a backup copy.</p> <p>For example, if you previously created a package called MyCustomizations, copy the entire MyCustomizations folder to a backup location.</p>	
Prepare Your SalesLogix Database		
	<p>9 If you are using Microsoft SQL Server and have published your database for replication, remove replication.</p> <p>Remember to reset replication after your upgrade is complete.</p>	
	<p>10 Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in SalesLogix Administrator.</p> <p>Note See the "Integrity Checker" topic in the Administrator Help for instructions.</p>	
	<p>11 Make sure all users have logged off SalesLogix.</p>	
	<p>12 Instruct all Remote users and Offices to run a final synchronization cycle.</p>	
	<p>13 Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.</p>	
	<p>14 Stop the Sync Service(s). If using a third-party scheduling package, deactivate the Synchronization Server tasks.</p>	
	<p>15 Close all SalesLogix applications and stop all applications and services that access the SalesLogix database using the SalesLogix OLE DB Provider.</p>	
	<p>16 Turn off all debuggers that may interfere with the SalesLogix installation. For Visual Studio installed with Microsoft SQL Server 2005, launch Visual Studio > Tools > Options > Debugging > Just-In-Time > and clear all three options.</p>	
	<p>17 Back up your production database. Verify the backup is successful and complete.</p>	
	<p>18 For Web installations, create a backup folder (such as Slxweb_701UpgradeBackup). Back up your existing files in the Slxweb folder and copy to the backup folder.</p>	

✓	Task Description	Notes
	<p>19 If applicable, remove the SalesLogix workaround for Microsoft Windows KB928388 update (2007 Time Zone update).</p> <p>Task 19 Details</p> <p>The SalesLogix workaround restored compatibility for Sage CRM SalesLogix version 7.x after installing the Microsoft Windows KB928388 update (2007 Time Zone update). The workaround changed registry entries from the Microsoft defined values to allow SalesLogix to function properly. Sage CRM SalesLogix version 7.0.1 is compatible with the new Microsoft registry settings and the workaround settings set by SalesLogix can be removed. Running SLX_MS_KB928388_Workaround_UNDO.reg restores the registry settings defined by Microsoft in the KB928388 update.</p> <p>If you installed the SLX_MS_KB928388_Workaround.reg, complete the following steps.</p> <p>To restore settings in the Microsoft Windows KB928388 update</p> <ol style="list-style-type: none"> 1 In the location where you downloaded the SalesLogix workaround for Microsoft Windows KB928388 update, find and double-click SLX_MS_KB928388_Workaround_UNDO.reg. 2 Run SLX_MS_KB928388_Workaround_UNDO.reg on all computers where SalesLogix is installed. 	

✓	Task Description	Notes
Upgrade your Main Office		
	<p>20 Upgrade your SalesLogix Server using the SLX_v7_SP1 installation. Note Depending on your installation method, service pack files and bundles may not be extracted to your local computer. Ensure you select the appropriate installation method for your upgrade.</p> <p>Task 20 Details</p> <p>You must run the SLX_v7_SP1 installation on every computer where a SalesLogix component is installed. This includes the SalesLogix Server, Administrative Workstation, SalesLogix Network Client, SalesLogix Remote Client, Synchronization Server, SpeedSearch Server, EmPulse Server, Web Host, Web Reporting Server, Web Manager, and Remote Office.</p> <p>To run the service pack installation</p> <ol style="list-style-type: none"> 1 Double-click SLX_v7_SP1.exe. 2 On the SalesLogix v7.0 Service Pack 1 screen, select your installation method: <ul style="list-style-type: none"> • Install the SalesLogix v7.0 Service Pack 1 extracts the service pack to a temporary folder and removes the installation files once the service pack installation is complete. If you select this option, the SalesLogix bundles will not be extracted to your local computer. You must browse out to the bundles in the .zip file in order to apply them to your database. • Extract and Install the SalesLogix v7.0 Service Pack 1 extracts the service pack files to a location you specify. The files are not removed once the installation is complete. If you select this option, choose a location where you want to store the service pack files. This option extracts the files and upgrade bundles required for the upgrade. Selecting the Extract and Install the Service Pack option allows you to distribute a smaller upgrade patch to your SalesLogix Network and Remote users. This process is detailed in Tasks 33 and 34. 3 Click Next. 4 The Welcome screen displays a list of currently installed SalesLogix components. Verify all the SalesLogix components installed on this computer appear in the list, and then click Install. The Update Network Images button is available on the Welcome screen. If you created automated installations of the SalesLogix Client, you can upgrade the installations to service pack 1 using this option (you must browse to the .msi file and click Update). Automated installations can be used to install the SalesLogix Client for new users. When properly updated, this installation contains the initial version of the SalesLogix Client and all service packs and hot fixes that have been applied to your system. 5 When the installation indicates a successful upgrade, click Finish. The upgrade is successful when the Status column displays Complete. 6 It is recommended that you restart your computer after the installation to ensure that all changes take effect. You may automatically receive a prompt to restart. 	
	<p>21 Upgrade your Administrative Workstation using the SLX_v7_SP1 installation. Note For detailed steps to run the installation, see Task 20.</p>	
	<p>22 Upgrade your SpeedSearch Server using the SLX_v7_SP1 installation. Note For detailed steps to run the installation, see Task 20.</p>	
	<p>23 Upgrade your EmPulse Server using the SLX_v7_SP1 installation. Note For detailed steps to run the installation, see Task 20.</p>	

✓	Task Description	Notes
Install the Service Pack Bundles		
	24 Start the SalesLogix Administrator.	
	25 Apply the service pack bundle named SalesLogix v7.0 Service Pack 1.sxb.	
	<p>Task 25 Details</p> <p>If you extracted the service pack files to your local computer (Task 20), the service pack bundle is located in the folder you specified. If you installed the service pack without extracting the files, you must browse out to the SLX_v7_SP1.zip file for the necessary bundle.</p> <p>The contents of the service pack bundle are outlined in Chapter 2, "Changes in this Release". This includes functionality formerly released in hot fixes.</p> <p>To install the service pack bundle</p> <ol style="list-style-type: none"> 1 SalesLogix Administrator > Bundles > Install. 2 Browse to and double-click the bundle named SalesLogix v7.0 Service Pack 1.sxb. 3 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. <p>NOTE: The Sales Order Status and Sales Order Type pick lists have been updated to remove two German entries. If you have customized these pick lists, clear the check marks in the Install column for the plugins.</p> <ul style="list-style-type: none"> • The Install column displays check marks indicating which plugins will be installed on your system. It is recommended that you install all plugins. • During installation, click Yes or Yes to All on any confirmation message boxes for overwriting system plugins. Although the messages indicate that your current plugins will be overwritten, they are not. SalesLogix versioning prevents plugins from being overwritten. 4 In the Information dialog box, the following message appears: "The following installed plugins already have releases. Do you want to update those releases?" <ul style="list-style-type: none"> • If you choose not to release upgraded plugins, your existing customizations remain released to users. • If you choose to release upgraded plugins, the v7.0.1 plugins are released to users. Your customizations are not overwritten, but they are unavailable to users until you release them using Architect. 5 In the Choose Teams dialog box, select the teams to which you want to release plugins, and then click OK. 	
	26 If your installation includes Web components, apply the bundle named SalesLogix 7.0 SP 1 Web.sxb. Note For more information about the Web components that have been updated, view the contents of the Web upgrade bundle in Architect before installation.	

✓	Task Description	Notes
Upgrade your Customizations		
	27 Apply the changes listed in Chapter 2, "Changes in this Release" . You can use one of the following strategies: <ul style="list-style-type: none"> • Add your customizations to the v7.0.1 plugins (recommended). • Add the v7.0.1 changes to your custom plugins. 	
	28 After applying the 7.0.1 changes, release the appropriate plugins using Architect. Note See the "Release a Plugin for Use" topic in the Architect Help for information on releasing plugins.	
Upgrade Synchronization		
	29 Upgrade your Synchronization Server using the SLX_v7_SP1 installation. Note For detailed steps to run the installation, see Task 20. Task 29 Details Before installing the service pack, ensure the Synchronization Service (SLXSyncService) is stopped. In addition, shut down any instances of Synchronization Server in the Task Manager.	
	30 Cycle your Synchronization Server(s) so that changes are sent to remotes. Use Custom Sync, since it is not necessary to run subscription. Note See the "Creating a Custom Sync Cycle" topic in the Administrator Help for more information.	
	31 Update your synchronization service jobs. Task 31 Details To ensure compatibility with the SalesLogix Server, you must update your synchronization service jobs. To update synchronization service jobs <ol style="list-style-type: none"> 1 In the Administrator, click Systems. 2 Click the Sync Automation Services tab. 3 Double-click the first job in the grid. 4 In the Database box, click the Browse button. 5 In the Data Link Manager, select the connection to your SalesLogix database. 6 Click OK. 7 Click OK again. 8 Repeat until all jobs have been updated with the new database connection. 	
	32 Restart the Sync Service(s).	

✓	Task Description	Notes
Upgrade SalesLogix Network Users		
	<p>33 Upgrade each of your SalesLogix Network user's computers using the SLX_v7_SP1 installation or the appropriate .MSP file.</p> <p>Task 33 Details</p> <p>You can upgrade Network users by distributing an .MSP file rather than the entire service pack patch. This file is smaller and upgrades only the necessary SalesLogix Client pieces. The .MSP files are located in the folder you specified when extracting the service pack files (see Task 20).</p> <p>After receiving the file, instruct your Network users to double-click SLX_v7_SP1.exe or SalesLogix Client 7.0 SP1.msp as appropriate.</p>	
Upgrade SalesLogix Remote Users/Offices		
	<p>34 Distribute Client installations or .MSP files to your Remote users and Offices. You may want to distribute via e-mail or copy the installations to a shared network drive.</p> <p>Task 34 Details</p> <p>You can upgrade Remote users and Offices by distributing an .MSP file rather than the entire service pack patch. This file is smaller and upgrades only the necessary SalesLogix Client pieces. The .MSP files are located in the folder you specified when extracting the service pack files (see Task 20).</p> <p>Distribute the following .MSP files as appropriate:</p> <ul style="list-style-type: none"> • For Remote users: SalesLogix Client 7.0 SP1.msp • For Remote Offices: SalesLogix Remote Office 7.0 SP1.msp 	
	35 Direct Remote users and Offices to upgrade using the SLX_v7_SP1 installation or the appropriate .MSP file.	
	36 Direct Remote users to start the SalesLogix Client.	
	37 Instruct Remote users and Offices to sync immediately after upgrading. Note Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.	
	38 Instruct users to log on to SalesLogix.	
Upgrade Web Components (if applicable)		
	39 Run the SLX_v7_SP1 installation on your Web Host(s).	
	40 If Web Manager is installed on any additional computers, run the SLX_v7_SP1 installation on the computer(s) where Web Manager is installed.	
	41 Run the SLX_v7_SP1 installation on your Web Reporting Server.	
	42 If you previously customized templates in one or more custom packages, locate the folder you backed up (such as MyCustomizations) and copy the entire folder to C:\Program Files\SalesLogix\Web Components\Slxweb.	

✓	Task Description	Notes
Perform Post-Upgrade Tasks		
	<p>43 If applicable, re-enable the Procedure SpeedSearch index.</p> <p>Task 43 Details</p> <p>The Procedure SpeedSearch index fails to run properly in the SpeedSearch Configuration Manager if your SalesLogix database originated as version 7.0.</p> <p>To avoid errors, the service pack bundle disables the Procedure index.</p> <ul style="list-style-type: none"> • If your database originated as version 7.0, you do not need to complete any additional steps. Proceed to Task 44. • If your database originated as a version earlier than 7.0 and you have the SpeedSearch Advanced license, complete the following steps to enable the Procedure index. <p>To enable the Procedure index</p> <ol style="list-style-type: none"> 1 SalesLogix Administrator > Manage > SpeedSearch Indexes. 2 In the Manage SpeedSearch Indexes dialog box, select the Procedure index, and then click Edit. 3 Select the Enabled check box. 4 Click OK. 	
	<p>44 If necessary, in the location where you extracted the service pack files (Task 20), delete the extracted files. These files are automatically deleted if you selected the Install the Service Pack option.</p>	

Chapter 2

Changes in this Release

In addition to the new functionality described in Workplan Task 4, this service pack fixes product defects. This includes defects previously addressed in hot fixes.

Refer to the Fixed Issues List for v7.0.1 on SupportOnline/Sage Online Support and Services for all defects fixed in this service pack.

Plugin changes are listed in the following sections by category (new or existing), type (form, script, and so on), and then alphabetically by plugin name within the category and type.

Changes to Existing Forms

Form Name / Change
Account:Assets <ul style="list-style-type: none"> Modified the CallAddEditAssetView(Mode) sub for localization.
Account:Associations <ul style="list-style-type: none"> In the script on the form, moved the LoadValues(objDetail) call in the LaunchAssociationView(mode, strLookupID, strAccount) sub.
Account:Contacts <ul style="list-style-type: none"> In the script on the form, included the System:SLX Database Support script.
Account:Details <ul style="list-style-type: none"> In the script on the form, modified the AXFormCreate(Sender) sub for localization.
Account Opportunities <ul style="list-style-type: none"> In the script on the form, modified the UpdateStatusBarTotals function with Dim strCase. Modified for localization.
Account:Reseller Opportunities <ul style="list-style-type: none"> In the script on the form, modified for localization.
Campaign:Responses <ul style="list-style-type: none"> Modified for localization.
Dashboard:Manage Dashboard Options <ul style="list-style-type: none"> In the script on the form, removed the rgYearClick(Sender) sub.
Contact:SLX Add Edit Lead Sources <ul style="list-style-type: none"> For the lueDescription:TLookupEdit control, set LookupRestrictOp to =. In the script on the form, modified the lueDescriptionPopup(Sender) sub to change Inactive to Active.
Defect:Defect Tasks <ul style="list-style-type: none"> In the script on the form, modified the CallAddEditDefectActivityView(Mode) sub for localization.
Lead:Details <ul style="list-style-type: none"> Modified for localization.
Lead:Notes-History <ul style="list-style-type: none"> For the memNotes:TMemo control, set Height to 400 and Width to 356. In the script on the form, added Option Explicit. Modified the cmdSendToWordClick(Sender) sub to include strAddress2.

Form Name / Change
<p>Opportunity:Order Details</p> <ul style="list-style-type: none"> In the script on the form, modified the CallAddEditSalesOrderView(strMode) sub for localization.
<p>Opportunity:Sales Process</p> <ul style="list-style-type: none"> Modified the UpdateStats(aspid) sub for localization.
<p>Sales Dashboard:Opportunity Detail Analysis View</p> <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub. Modified the grdFiltersCustomDrawCell sub.
<p>Sales Dashboard:Pipeline Status Analysis View</p> <ul style="list-style-type: none"> Added the cboListBy:TComboBox control. In the script on the form, removed the grdFiltersCustomDrawCell and cmdShowBaseFilterClick(Sender) subs.
<p>Sales Dashboard:Product Sales Analysis View</p> <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub.
<p>Sales Dashboard:Sales Analysis View</p> <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub.
<p>Sales Dashboard:Sales Dashboard Detail</p> <ul style="list-style-type: none"> In the script on the form, modified the AXFormOpen(Sender), CreateObjCalendarRS, and CreateObjTaskRS subs.
<p>Sales Dashboard:Win Rate Analysis View</p> <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub.
<p>System:Add Edit Association</p> <ul style="list-style-type: none"> For frmAssociation:TAXForm, set the OnShow event to AXFormShow. For the lblCurrentofA:TLabel and lblSelectedofA:TLabel controls, set Caption to of/to (from of/a). In the script on the form, modified the AXFormOpen (Sender) sub. Added the AXFormShow(Sender) sub which contains code removed from the AXFormOpen sub.
<p>System:Asset Lookup</p> <ul style="list-style-type: none"> Modified for localization.
<p>System:Defect Detail</p> <ul style="list-style-type: none"> In the script on the form, modified the AXFormAfterPost sub to remove the Stop debugging statement.
<p>System>Edit View Notes History</p> <ul style="list-style-type: none"> For frmViewNotesHistory:TAXForm, set the OnChange event to AXFormChange. For the memNotes:TMemo control, set the OnChange event to memNotesChange. Added the memShortNotes:TMemo control. In the script on the form, added the cmdOKClick(Sender) sub.
<p>System:History Details View</p> <ul style="list-style-type: none"> Modified for localization.
<p>System:Import Leads</p> <ul style="list-style-type: none"> In the script on the form, modified the PopulateArrays sub for a spelling error. Modified the cboImportTemplateChange(Sender) and cmdSaveImportTemplateClick(Sender) subs to change double quotes to single quotes.
<p>System:Insert Campaign</p> <ul style="list-style-type: none"> Modified for localization.

Form Name / Change
<p>System:Insert New Lead</p> <ul style="list-style-type: none"> For InsertLeadForm:TAXForm, set the OnOpen event to AXFormOpen. For the leLeadSource:TLookupEdit control, set LookupRestrictField to Status, LookupRestrictOp to =, and the OnPopup event to leLeadSourcePopup. In the script on the form, added the AXFormOpen(Sender) and leLeadSourcePopup(Sender) subs.
<p>System:Insert New Ticket</p> <ul style="list-style-type: none"> In the script on the form, modified the OnResDbClick(Sender), OnDescDbClick(Sender), and OnCommentsDbClick(Sender) subs for localization.
<p>System:Insert Opportunity</p> <ul style="list-style-type: none"> In the script on the form, modified the DefineContactsGrid sub to change the Account field to 128 characters.
<p>System:Lead Detail</p> <ul style="list-style-type: none"> For the leLeadSource:TLookupEdit control, set LookupRestrictField to Status, LookupRestrictOp to =, and the OnPopup event to leLeadSourcePopup.
<p>System:Manage Product</p> <ul style="list-style-type: none"> In the script on the form, modified the grdProductsEdited(Sender, PrimaryKeyValue, FieldName, Value) function to add a check for the original value being Null.
<p>System:Manage Qualifications</p> <ul style="list-style-type: none"> In the script on the form, modified the cmdDeleteClick(Sender) sub for localization.
<p>System:Manage Quota</p> <ul style="list-style-type: none"> In the script on the form, modified the grdSalesPopupMenuClick(Sender, Item) sub to remove grdSalesClick(Sender).
<p>System:Manage Targets</p> <ul style="list-style-type: none"> In the script on the form, included the System:SLX Util script. Modified the Init(strID, objTargetsRS, strMode) and RemoveSelectedTargets subs for localization.
<p>System:Move Products To Assets</p> <ul style="list-style-type: none"> In the script on the form, modified the DefineAssetsGrid(objPrdRS) sub for localization.
<p>System:Opportunity Detail</p> <ul style="list-style-type: none"> For the lveSource:TLookupEdit control, set the OnPopup event to lveSourcePopup. In the script on the form, added the lveSourcePopup(Sender) sub. In the pklReasonPopup(Sender) sub, removed the localize calls from around the pick list names.
<p>System:SLX Manage Hierarchy</p> <ul style="list-style-type: none"> In the script on the form, modified the FindAccountParent(strAccountID) function and AddAccountChildren(strCrntParentID, objNode) sub to include Dim lngIndex.
<p>System:SLX Report Manager View</p> <ul style="list-style-type: none"> In the script on the form, removed the GetGroupName function. Modified the ppeValueKeyPress(Sender, ByRef Key) sub to remove vbKeyBack and replace with 8. Modified for localization.
<p>System:SP_Update Stages</p> <ul style="list-style-type: none"> In the script on the form, modified the UpdateStats(aSalesProcessId) sub for localization.
<p>Ticket:Comments</p> <ul style="list-style-type: none"> In the script on the form, modified the cmdInternalCommentsClick(Sender) sub for localization.

Changes to Existing Global Scripts

Script Name / Change
System:Keyword Search <ul style="list-style-type: none"> Included the System:SLX Util script. Modified the LaunchKeywordSearch(aMainTable) sub for localization.

Changes to Existing Scripts

Script Name / Change
Dashboard:Content Set Support <ul style="list-style-type: none"> In Class ContentSet, modified Private mUsePeriodFilters (from mUserPeriodFilters). Modified the Get ContentSetName(), Get ActiveFilter(), Get UsePeriodFilters(), Get FilterValuesRS(), Let PeriodField(strPeriodField), and Let UsePeriodFilters(blnUsePeriodFilters) properties. Modified the Class_Initialize and InitalXML subs. Modified the GetWhereSQL function. Removed the SelectDrillPath(strListBy, strValue) function.
Dashboard:General View Support <ul style="list-style-type: none"> Included the System:SLX_Multi_Currency script. Modified the SetForm(objForm) and SetControl(oCon) subs. Added the ReAlignForm(objForm) sub.
Dashboard:KPI Support <ul style="list-style-type: none"> In Class KPISet, modified Private mUsePeriodFilters (from mUserPeriodFilters). In the Class_Initialize sub, InitalXML sub, and GetWhereSQL function, changed mUserPeriodFilters to mUsePeriodFilters. In the Get BuildTrendSQL() property, changed mBuildTendSQL to mBuildTrendSQL. Modified the FormatTrendData(objRS, objTrendRS) sub. Removed the CopyRS(objSourceRS, objTargetRS) sub, XAddFilterValue(strFilterName, strValue) sub, Get PeriodField() property, and the ExportToExcel(objGrid ,strSheetName) function. Modified the BuildKPICbo(oCombo, oComboCodes) sub for localization.
Dashboard:Period Support <ul style="list-style-type: none"> Changed GetPeriodSQL from a Private to Public function.
System:Attachment Support <ul style="list-style-type: none"> Changed the OnFormOpen sub to InitSec. Modified for localization.
System:Notes History Common <ul style="list-style-type: none"> Modified the PopupMenuClick(Sender, Item) sub to define the strAddress2 variable and eliminate the second parameter. Modified the HistoryChangeNode(HistoryID) function to change And to Then, If. Modified for localization.
System:SLX Address Common <ul style="list-style-type: none"> In the script on the form, included the System:SLX Util script. Modified the GetDisplayAddress(blnPrimery, Table, Field, ID, Address, AddressDesc) and GetDisplayAddressEx(blnPrimery, Table, Field, ID, Address, AddressDesc, AddressType, Attention) functions to add CheckEmpty call to check for null values. Modified the BuildDisplayAddressFromRS(objRS) function to add BuildDisplayAddressFromRS="".
System:SLX_Common <ul style="list-style-type: none"> Modified the OpenMainViewFromGridCrntID(objGrid, strKeyField, strPlugin, intMode, blnExisting) sub to change strCurrentID to strCrntID.
System:SLX CTI Support <ul style="list-style-type: none"> Included the System:SLX Database Support script. Modified the slx_Dialer(strCountry, strPhoneNumber, strEntityName) sub.

Script Name / Change
System:SLX Report Conditions <ul style="list-style-type: none"> Included the System:SLX StringList and System:SLX Util scripts. Added the SLXReportLocalizationHelper class. Modified for localization.
System:SLX Report Controller <ul style="list-style-type: none"> Modified the SLXReportController class. Modified for localization.
System:SP_SalesProcessFunctions <ul style="list-style-type: none"> Modified the SalesProcessValid(aSPID), DoSetNextStage(astrSPID,aintPrevStageSEQ), DoSetNextStage2(astrSPID,aintPrevStageSEQ), GetNextStageID(astrSPID,aintPrevSEQ), DoUnCompleteSalesProcess(aspid), IsAllStageStepsCompleted(astrStageID, astrSPID), IsAllStagesCompleted(astrSPID), IsAllPrevStagesCompleted(astrSPID,aCurrentSeq), IsStageCompleted(aStageID), IsSalesProcessCompleted(aSPID), IsAnyStepsCompleted(astrSPID), IsAnyStageStepsCompleted(astrStageID, astrSPID), GetRequiredStepID(astrSPAID), GetCurrentStatus2(astrSPID) (renamed to GetCurrentStatus(astrSPID), GetSPCompletedDate(astrSPID), GetCurrentSalesProcessID(astrENTITYID), GetCurrentSalesProcessName(astrENTITYID), DoActivity(astrspaid,objNode), GetPrimaryOppContactID(), GetFirstOppContactID(), GetAccManagerID(), DoContactProcess(astrSPAID,objNode), GetStepName(aspaid), GetDecription(aspaid), GetSPPluginIDFromName(aSalesProcess), GetPluginID(aName,aFamily,aType), Checkreq(aID,aID2) and CanReAssignProcess(astrSPID) functions.

Changes to Standard Menus

Name / Change
System:Standard Menu <ul style="list-style-type: none"> For the Opportunities NavMenu, added Insert New Opportunity (Function Insert:Opportunity).

Changes to Existing Pick Lists

Pick List Name / Change
Sales Order Status <ul style="list-style-type: none"> Modified to remove German entries.
Sales Order Type <ul style="list-style-type: none"> Modified to remove German entries.

Changes to Existing Groups

Group Name / Change
Ticket:Punched In <ul style="list-style-type: none"> Modified the layout for Last Updated.

