

Applying Service Pack 2 for Sage CRM SalesLogix Version 7.0

Version 7.0.2

Developed by SalesLogix Technical Publications



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Applying Service Pack 2 for Sage CRM SalesLogix Version 7.0

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Contents

Introduction.....	3
Requirements.....	3
About This Document.....	3
Chapter 1 Upgrade Workplan.....	5
Prepare to Upgrade.....	5
Protect Your Customizations.....	6
Prepare Your SalesLogix Database.....	7
Upgrade your Main Office.....	8
Install the Service Pack Bundles.....	9
Upgrade your Customizations.....	10
Upgrade Synchronization.....	10
Upgrade SalesLogix Network Users.....	11
Upgrade SalesLogix Remote Users/Offices.....	11
Upgrade Web Components (if applicable).....	11
Perform Post-Upgrade Tasks.....	12
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.....	18
Changes to Existing Groups.....	18
Changes to Existing Pick Lists.....	19
Changes to Existing Reports.....	19

Introduction

This document provides instructions for upgrading the Sage CRM SalesLogix Network and Web components to Sage CRM SalesLogix version 7.0 Service Pack 2. Release 7.0.2 includes defect fixes and support for Microsoft Windows Vista.

Requirements

Before upgrading to version 7.0.2, 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 2. 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* Second Edition
- *Upgrading Sage CRM SalesLogix from Version 6.0.x or 6.1.x to 7.0* Second Edition
- *Upgrading Sage CRM SalesLogix from Version 6.2.x to 7.0* Second Edition

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 2. 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 v7.0.2 in a test environment before installing on your production database. Note Refer to SupportOnline\Sage Software 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 7.0.2 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 EXE file within the service pack .zip file and you must extract the bundles from the EXE 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 21.</p>		
4	Understand the changes in v7.0.2. Note Version 7.0.2 is a cumulative release which includes the changes released in v7.0.1. See Task 5 for details.	
<p>Task 4 Details</p> <p>In addition to defect fixes, v7.0.2 contains the following changes:</p> <ul style="list-style-type: none"> Support for Microsoft Windows Vista. See task 6 for more information. In addition, if your Remote databases are running on Windows Vista, refer to SupportOnline\Sage Software Online Support and Services Knowledge Base and search for "attach remote", "Vista". SLXSystem.exe is installed as a Windows Service. Running the SLXSystem.exe as a service removes the startup/shutdown time when the Client creates a connection to the database using the SLXSystem.exe. <p>By default, the timing registry value is set to 0 to keep the service always running. In a Windows Vista environment, the value must remain set to 0. If the SLXSystem.exe is already installed as a service in your Sage SalesLogix environment, the timing registry value will not be changed. The timing registry value is controlled by the HKEY_LOCAL_MACHINE/Software/SalesLogix/ShutdownDelay(dword) registry key.</p>		

✓	Task Description	Notes
	<p>5 Understand the changes in v7.0.1.</p> <p>Task 5 Details</p> <p>In addition to defect fixes, v7.0.1 contained 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. • Compatibility between SalesLogix and Microsoft Windows after installing Windows Time Zone updates. <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 26 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 45).</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>	
	<p>6 Review and understand the requirement for running SalesLogix on Microsoft Windows Vista.</p> <p>Note For additional Vista information, refer to the v7.0.2 Tips and Tricks document on SupportOnline\Sage Software Online Support and Services.</p> <p>Task 6 Details</p> <p>If you are running SalesLogix on Windows Vista, ensure you meet the following requirement:</p> <ul style="list-style-type: none"> • If your installation includes SpeedSearch, configure the Admin user to run the SpeedSearch Service. If the SpeedSearch Service is installed on a machine with Windows Vista Business Edition, the Local System Account does not have enough inherited permissions to run the service. 	
Protect Your Customizations		
	<p>7 (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 v7.0.2 plugins. However, this bundle can be used as a backup of your customizations.</p>	

✓	Task Description	Notes
	<p>8 Review the v7.0.2 plugin changes to determine if you have customized any plugins that are updated in this release.</p> <p>Task 8 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>	
	<p>9 After reviewing the plugin changes, determine if you are going to add your customizations to the v7.0.2 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>10 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>11 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>12 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>13 Make sure all users have logged off SalesLogix.</p>	
	<p>14 Instruct all Remote users and Offices to run a final synchronization cycle.</p>	
	<p>15 Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.</p>	
	<p>16 Stop the Sync Service(s). If using a third-party scheduling package, deactivate the Synchronization Server tasks.</p>	
	<p>17 Close all SalesLogix applications and stop all applications and services that access the SalesLogix database using the SalesLogix OLE DB Provider.</p>	
	<p>18 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>19 Back up your production database. Verify the backup is successful and complete.</p>	

✓	Task Description	Notes
	20 For Web installations, create a backup folder (such as Slxweb_702UpgradeBackup). Back up your existing files in the Slxweb folder and copy to the backup folder.	
Upgrade your Main Office		
	21 Upgrade your SalesLogix Server using the SLX_v7_SP2 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. Task 21 Details You must run the SLX_v7_SP2 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. To run the service pack installation 1 Double-click SLX_v7_SP2.exe . 2 On the SalesLogix v7.0 Service Pack 2 screen, select your installation method: <ul style="list-style-type: none"> • Install the SalesLogix v7.0 Service Pack 2 extracts the service pack to a temporary folder and removes the installation files once the service pack installation is complete. If you install the service pack from a temporary folder without extracting all the contents to your local computer, the bundles remain in the EXE file within the service pack .zip file and you must extract the bundles from the EXE when you are ready to install them. • Extract and Install the SalesLogix v7.0 Service Pack 2 extracts the service pack files to a location you specify. The files are not removed once the installation is complete. 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. 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 35 and 36. 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 2 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.	
	22 Upgrade your Administrative Workstation using the SLX_v7_SP2 installation. Note For detailed steps to run the installation, see Task 21.	

✓	Task Description	Notes
	23 Upgrade your SpeedSearch Server using the SLX_v7_SP2 installation. Note For detailed steps to run the installation, see Task 21.	
	24 Upgrade your EmPulse Server using the SLX_v7_SP2 installation. Note For detailed steps to run the installation, see Task 21.	
Install the Service Pack Bundles		
	25 Start the SalesLogix Administrator.	
	26 Apply the service pack bundle named SalesLogix v7.0 Service Pack 2.sxb. Task 26 Details If you extracted the service pack files to your local computer (Task 21), the service pack bundle is located in the folder you specified. If you installed the service pack without extracting the files, you must extract the bundle from the SLX_v7_SP2.exe before installation. The contents of the service pack bundle are outlined in Chapter 2, "Changes in This Release" . This includes functionality formerly released in hot fixes. To install the service pack bundle <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 2.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. 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. <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 v7.0.2 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. 	
	27 If necessary, install the Web upgrade bundle named SalesLogix Web v7.0 Service Pack 1.sxb. Task 27 Details If your current version is 7.0.1 and you already applied the Web upgrade bundle named SalesLogix Web v7.0 Service Pack 1.sxb, you do not need to reapply this bundle. Note For information about the Web components that have been updated, view the contents of the Web upgrade bundle in Architect before installation.	

✓	Task Description	Notes
	<p>28 If necessary, install the Web upgrade bundle named SalesLogix Web v7.0 Service Pack 2.sxb.</p> <p>Task 28 Details</p> <p>If your current version is 7.0 and your installation includes Web components, you must install the SalesLogix Web v7.0 Service Pack 1.sxb and SalesLogix Web v7.0 Service Pack 2.sxb bundles.</p> <p>Note For information about the Web components that have been updated, view the contents of the Web upgrade bundle in Architect before installation.</p>	
Upgrade your Customizations		
	<p>29 Apply the changes listed in Chapter 2, "Changes in This Release". You can use one of the following strategies:</p> <ul style="list-style-type: none"> • Add your customizations to the v7.0.2 plugins (recommended). • Add the v7.0.2 changes to your custom plugins. 	
	<p>30 After applying the 7.0.2 changes, release the appropriate plugins using Architect.</p> <p>Note See the "Release a Plugin for Use" topic in the Architect Help for information on releasing plugins.</p>	
Upgrade Synchronization		
	<p>31 Upgrade your Synchronization Server using the SLX_v7_SP2 installation.</p> <p>Note For detailed steps to run the installation, see Task 21.</p> <p>Task 31 Details</p> <p>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.</p>	
	<p>32 Cycle your Synchronization Server(s) so that changes are sent to remotes. Use Custom Sync, since it is not necessary to run subscription.</p> <p>Note See the "Creating a Custom Sync Cycle" topic in the Administrator Help for more information.</p>	
	<p>33 Update your synchronization service jobs.</p> <p>Task 33 Details</p> <p>To ensure compatibility with the SalesLogix Server, you must update your synchronization service jobs.</p> <p>To update synchronization service jobs</p> <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. 	

✓	Task Description	Notes
	34 Restart the Sync Service(s).	
Upgrade SalesLogix Network Users		
	35 Upgrade each of your SalesLogix Network user's computers using the SLX_v7_SP2 installation or the appropriate .MSP file.	
	<p>Task 35 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 21).</p> <p>After receiving the file, instruct your Network users to double-click SLX_v7_SP2.exe or SalesLogix Client 7.0 SP2.msp as appropriate.</p>	
Upgrade SalesLogix Remote Users/Offices		
	36 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>Task 36 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 21).</p> <p>Distribute the following .MSP files as appropriate:</p> <ul style="list-style-type: none"> • For Remote users: SalesLogix Client 7.0 SP2.msp • For Remote Offices: SalesLogix Remote Office 7.0 SP2.msp 	
	37 Direct Remote users and Offices to upgrade using the SLX_v7_SP2 installation or the appropriate .MSP file.	
	38 Instruct Remote users and Offices to log on to the Synchronization Client and sync immediately after upgrading. Note Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.	
	39 Instruct users to log on to SalesLogix.	
Upgrade Web Components (if applicable)		
	40 Run the SLX_v7_SP2 installation on your Web Host(s).	
	41 If Web Manager is installed on any additional computers, run the SLX_v7_SP2 installation on the computer(s) where Web Manager is installed.	
	42 Run the SLX_v7_SP2 installation on your Web Reporting Server.	
	43 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>44 If necessary, set a limit on the number of records returned in the Web Client.</p> <p>Task 44 Details</p> <p>If you have a high number of users running queries that return an extremely large number of records, you may want to set a limit on the number of records returned to prevent memory errors.</p> <p>To set the number of records returned on the Web Client</p> <ol style="list-style-type: none"> 1 Open the Registry Editor. Start > Run > type Regedit > OK 2 Browse to HKLM/Software/SalesLogix/Web Host. 3 Right-click Web Host, point to New, and then click DWORD. A new DWORD value appears. 4 Name the new DWORD value MaxLookupResults, and then press Enter. 5 In the Value box, type your company's recommended maximum number of result records. 6 Select the Decimal option (NOT Hexadecimal). 7 Click OK. 8 Reset IIS. 	
	<p>45 If applicable, re-enable the Procedure SpeedSearch index.</p> <p>Task 45 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 46. • 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>46 If necessary, in the location where you extracted the service pack files (Task 21), 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 Tasks 4 and 5, this service pack fixes product defects. This includes defects previously addressed in hot fixes.

Refer to the Fixed Issues List for v7.0.2 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	7.0.1	7.0.2
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:Literature Requests <ul style="list-style-type: none"> For the grdLitRequest:TDataGrid control, fixed the spelling of the Fulfilled By column. 		✓
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. 	✓	
Contact:Literature Requests <ul style="list-style-type: none"> For the grdLitRequest:TDataGrid control, fixed the spelling of the Fulfilled By column. 		✓
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. 	✓	
Dashboard:Manage Dashboard Options <ul style="list-style-type: none"> In the script on the form, removed the rgYearClick(Sender) sub. 	✓	
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. 	✓	

Form Name / Change	7.0.1	7.0.2
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. 	✓	
Opportunity:Products <ul style="list-style-type: none"> In the script on the form, modified the grdProductsEdited(Sender, PrimaryKeyValue, FieldName, Value) function. Modified the CallAddOpportunityProductsView sub. Changed blnMCOnto to gblnMCOnto throughout. 		✓
Opportunity:Order Details <ul style="list-style-type: none"> In the script on the form, modified the CallAddEditSalesOrderView(strMode) sub for localization. 	✓	
Opportunity:Sales Process <ul style="list-style-type: none"> Modified the UpdateStats(aspid) sub for localization. 	✓	
Sales Dashboard:Opportunity Detail Analysis View <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub. Modified the grdFiltersCustomDrawCell sub. 	✓	
Sales Dashboard:Pipeline Status Analysis View <ul style="list-style-type: none"> Added the cboListBy:TComboBox control. In the script on the form, removed the grdFiltersCustomDrawCell and cmdShowBaseFilterClick(Sender) subs. 	✓	
Sales Dashboard:Product Sales Analysis View <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub. 	✓	
Sales Dashboard:Sales Analysis View <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub. 	✓	
Sales Dashboard:Sales Dashboard Detail <ul style="list-style-type: none"> In the script on the form, modified the AXFormOpen(Sender), CreateObjCalendarRS, and CreateObjTaskRS subs. 	✓	
Sales Dashboard:Win Rate Analysis View <ul style="list-style-type: none"> In the script on the form, removed the cmdShowBaseFilterClick(Sender) sub. 	✓	
System:Activity Details View <ul style="list-style-type: none"> In the script on the form, modified the AXFormShow(Sender) sub for the ScheduledBy variable. 		✓
System:Activity Preview <ul style="list-style-type: none"> In the script on the form, removed lblScheduledName.Caption = Activity.UserName in the AXFormChange(Sender) sub. Added an If statement for Activity.ScheduledBy. 		✓
System:Add Edit Association <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. 	✓	
System:Add Edit Product <ul style="list-style-type: none"> In the script on the form, added Dim aUpdateOpps, the GetModifiedProductArray function, and the UpdateModifiedProductArray(PrdID, Value, Program) sub. Modified the Init(Mode, ID, aUpdatedOpps) and ApplyChanges functions. Modified the cmdButtonClick(Sender) and CheckToUpdateExistingOppProducts subs. 		✓
System:Add Opportunity Product <ul style="list-style-type: none"> In the script on the form, modified the cmdButtonClick(Sender) sub. Added the UpdateExistingOppProducts(aModProducts) sub. 		✓

Form Name / Change	7.0.1	7.0.2
System:Asset Lookup <ul style="list-style-type: none"> Modified for localization. 	✓	
System:Defect Detail <ul style="list-style-type: none"> In the script on the form, modified the AXFormAfterPost sub to remove the Stop debugging statement. 	✓	
System>Edit View Notes History <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. 	✓	
System:History Details View <ul style="list-style-type: none"> (7.0.1) Modified for localization. (7.0.2) In the script on the form, modified the txtTypeChange(Sender) sub to change Activity.User to Activity.ScheduledBy. 	✓	
System:Import Leads <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. 	✓	
System:Insert Campaign <ul style="list-style-type: none"> Modified for localization. 	✓	
System:Insert New Lead <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 ledLeadSourcePopup(Sender) subs. 	✓	
System:Insert New Ticket <ul style="list-style-type: none"> In the script on the form, modified the OnResDbClick(Sender), OnDescDbClick(Sender), and OnCommentsDbClick(Sender) subs for localization. 	✓	
System:Insert Opportunity <ul style="list-style-type: none"> In the script on the form, modified the DefineContactsGrid sub to change the Account field to 128 characters. 	✓	
System:Lead Detail <ul style="list-style-type: none"> For the leLeadSource:TLookupEdit control, set LookupRestrictField to Status, LookupRestrictOp to =, and the OnPopup event to leLeadSourcePopup. 	✓	
System:Manage Product <ul style="list-style-type: none"> (7.0.1) In the script on the form, modified the grdProductsEdited(Sender, PrimaryKeyValue, FieldName, Value) function to add a check for the original value being Null. (7.0.2) In the script on the form, added Dim aUpdateOpps. Modified the CallAddEditProductView(Mode) sub and the grdProductsEdited(Sender, PrimaryKeyValue, FieldName, Value) function. Added the UpdateModifiedProductArray(PrdID, Value, Program) sub and the GetModifiedProductArray function. 	✓	✓
System:Manage Qualifications <ul style="list-style-type: none"> In the script on the form, modified the cmdDeleteClick(Sender) sub for localization. 	✓	
System:Manage Quota <ul style="list-style-type: none"> In the script on the form, modified the grdSalesPopupMenuClick(Sender, Item) sub to remove grdSalesClick(Sender). 	✓	

Form Name / Change	7.0.1	7.0.2
System:Manage Targets <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. 	✓	
System:Move Products To Assets <ul style="list-style-type: none"> In the script on the form, modified the DefineAssetsGrid(objPrdRS) sub for localization. 	✓	
System:Opportunity Detail <ul style="list-style-type: none"> (7.0.1) For the IveSource:TLookupEdit control, set the OnPopup event to IveSourcePopup. In the script on the form, added the IveSourcePopup(Sender) sub. In the pklReasonPopup(Sender) sub, removed the localize calls from around the pick list names. (7.0.2) In the script on the form, modified the CallUpdateOppCurrency sub. 	✓	✓
System:SLX Manage Hierarchy <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. 	✓	
System:SLX Report Manager View <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. 	✓	
System:SP_Update Stages <ul style="list-style-type: none"> In the script on the form, modified the UpdateStats(aSalesProcessId) sub for localization. 	✓	
Ticket:Comments <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	7.0.1	7.0.2
System:Global System <ul style="list-style-type: none"> Modified the OnBeforeFunctionExecute_EditDeleteItem(functionNumber, functionName) function to change the argument from 1 to 3 for Leads. 		✓
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	7.0.1	7.0.2
Dashboard:Configuration Support <ul style="list-style-type: none"> Removed ADO enumeration constants. 		✓

Script Name / Change	7.0.1	7.0.2
<p>Dashboard:Content Set Support</p> <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. 	✓	
<p>Dashboard:General View Support</p> <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. 	✓	
<p>Dashboard:KPI Support</p> <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. 	✓	
<p>Dashboard:Period Support</p> <ul style="list-style-type: none"> Changed GetPeriodSQL from a Private to Public function. 	✓	
<p>System:Attachment Support</p> <ul style="list-style-type: none"> (7.0.1) Changed the OnFormOpen sub to InitSec. Modified for localization. (7.0.2) Modified the OnFormOpen sub to prevent duplicate attachments from displaying. Modified the GetEmailTemplateMenuItems function to remove two lines of code. 	✓	✓
<p>System:Insert Opportunity Common</p> <ul style="list-style-type: none"> Modified the GetMultiCurrencyInfo sub and the DoGridCalculations(Sender, FieldName, Value, OppID) function. 		✓
<p>System:Notes History Common</p> <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. 	✓	
<p>System:SLX Address Common</p> <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="". 	✓	
<p>System:SLX_Common</p> <ul style="list-style-type: none"> Modified the OpenMainViewFromGridCrntID(objGrid, strKeyField, strPlugin, intMode, blnExisting) sub to change strCurrentID to strCrntID. 	✓	
<p>System:SLX Crystal Report</p> <ul style="list-style-type: none"> Modified the ReportConditionToRSF(aCondition) function. 		✓
<p>System:SLX CTI Support</p> <ul style="list-style-type: none"> Included the System:SLX Database Support script. Modified the slx_Dialer(strCountry, strPhoneNumber, strEntityName) sub. 	✓	
<p>System:SLX Database Support</p> <ul style="list-style-type: none"> Added ADO enumeration constants for Microsoft Vista support. 		✓

Script Name / Change	7.0.1	7.0.2
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"> (7.0.1) Modified the SLXReportController class. Modified for localization. (7.0.2) Modified the ExportReportTo(ExportType, DestinationFile) sub to include 'objMainView.ShowModal ' show report in modal dialog. 	✓	✓
System:SP_SalesProcessFunctions <ul style="list-style-type: none"> (7.0.1) Modified the SalesProcessValid(aSPID), DoSetNextStage(astrSPID,aIntPrevStageSEQ), DoSetNextStage2(astrSPID,aIntPrevStageSEQ), GetNextStageID(astrSPID,aIntPrevStageSEQ), 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. (7.0.2) Commented out Const adCmdText = 1, Const adCmdTable = 2, and Const adFLDLong = 128. 	✓	✓

Changes to Standard Menus

Name / Change	7.0.1	7.0.2
System:Standard Menus <ul style="list-style-type: none"> For the Opportunities NavMenu, added Insert New Opportunity (Function Insert:Opportunity). 	✓	

Changes to Existing Groups

Group Name / Change	7.0.1	7.0.2
Ticket:Punched In <ul style="list-style-type: none"> Modified the layout for Last Updated. 	✓	

Changes to Existing Pick Lists

Pick List Name / Change	7.0.1	7.0.2
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 Reports

Report Name / Change	7.0.1	7.0.2
Ticket:Support Problem Analysis - Sample <ul style="list-style-type: none">Removed unnecessary links.		✓

