

Applying SNC Update 02 for Saleslogix Version 8.1

Version 8.1.0.02 SNC

Developed by Saleslogix User Assistance

Applying SNC Update 02 for Saleslogix v8.1

Documentation Comments	This documentation was developed by Saleslogix User Assistance. For content revisions, questions, or comments, contact the Saleslogix writers at saleslogix.techpubs@swiftpage.com .
Address	Saleslogix 8800 North Gainey Center Drive, Suite 200 Scottsdale, AZ 85258 USA
Version	Version 8.1.0.02 SNC 2014
Copyright	Copyright © 1997-2014, SalesLogix N.A, LLC. All rights reserved This product and related documentation are protected by copyright and are distributed under licenses restricting their use, copying, distribution, and decompilation. No part of this product or related documentation may be reproduced in any form by any means without prior written authorization of Saleslogix and its licensors, if any.
Trademarks	Swiftpage, Act!, SalesLogix, and the Swiftpage product and service names mentioned herein are registered trademarks or trademarks of Swiftpage ACT! LLC, or its affiliated entities. All other trademarks are property of their respective owners.
Disclaimer	Saleslogix has thoroughly reviewed this manual. All statements, technical information, and recommendations in this manual and in any guides or related documents are believed reliable, but the accuracy and completeness thereof are not guaranteed or warranted, and they are not intended to be, nor should they be understood to be, representations or warranties concerning the products described. Saleslogix assumes no responsibility or liability for errors or inaccuracies with respect to this publication or usage of information. Further, Saleslogix reserves the right to make changes to the information described in this manual at any time without notice and without obligation to notify any person of such changes.
Technical Support	Technical Support is available to Saleslogix customers with support contracts directly from Swiftpage, and to Certified Business Partners. Calls are answered during business hours, Monday through Friday, excluding holidays. Partners with a valid technical support contract and a Web access code can request technical support electronically on the Partner Support Portal Web site: www.saleslogix.com/partners . Customers with a valid technical support contract and a Web access code can request technical support electronically on the Customer Support Portal Web site: www.saleslogix.com/customers . Revisions to this book are available through both Portal Web sites. Check regularly for current Saleslogix product documentation.

Applying SNC Update 02 for Saleslogix Version 8.1

This document describes SNC Update 02 for Saleslogix version 8.1. SNC Updates provide modifications to pieces of Saleslogix such as the Provider, SLXServer, Admin, Architect, Saleslogix Client, SpeedSearch, Sync Server, Sync Client, and so forth. Applying these updates may also be required for Web environments when the fix is for the Provider, SLXServer, or SpeedSearch.



- This update adds support for Saleslogix v8.1 to run against an Oracle database.
- If your implementation includes Outlook sync or Saleslogix Mobile, you will also need to install 8.1 Web Core Update 02.

Prerequisites

The following Saleslogix software must be installed before installing this update:

- Saleslogix version 8.1



Do not install SNC Update 02 for Saleslogix 8.1 on any other Saleslogix version.

Implementing Saleslogix version 8.1 on an Oracle Database

SNC Update 02 for Saleslogix Version 8.1 adds functionality to enable Saleslogix v8.1 to run on an Oracle database. These steps are only required for implementations of Saleslogix version 8.1 on an Oracle database. If your implementation uses a SQL database, skip the following steps and proceed to ["Issues Fixed in This Update" on page 2](#).

Installing Saleslogix on Oracle for the first time

If you are installing Saleslogix on Oracle for the first time, use the following steps.

To install Saleslogix 8.1 on an Oracle database

1. Install Saleslogix by following the instructions in the *SalesLogix v8.1 Implementation Guide*, including Appendix A: Creating a Database for Oracle. with the following modifications:
 - a. Do not use the Oracle.dmp files that are provided on the Saleslogix DVD. New Oracle.dmp files are available in the SLX_v810_Oracle_Database.zip on the Saleslogix external Customer and Partner portals.
 - b. Ignore the steps for running the CreateOracleIndexes.sql script (Index the Database) and the CreateOracleViews.sql script (Add Database Views). These scripts are no longer necessary.

- c. On the Oracle Administrator machine, run the GrantSYSDBAViews.sql. This script is necessary to allow addition of necessary views.
 - i. Open Oracle SQL *Plus Worksheet or SQL Developer.
 - ii. On the **File** menu, click **Open**.
 - iii. Browse to the **GrantSYSDBAViews.sql** script. The script is located in the Database\Oracle folder on the Saleslogix DVD.
 - iv. To load the script into the Query section, click **Open**.
 - v. To run the script, click **Execute**.
2. Follow the steps in this document for installing SLXV8.1 SNC 02.

Upgrading Saleslogix on Oracle

If you are upgrading your Saleslogix on Oracle installation to Saleslogix v8.1 use the following steps.

To upgrade Saleslogix to version 8.1 on an Oracle database

1. Follow the instructions for upgrading your Saleslogix installation as described in the document called *Upgrading to Saleslogix v8.1*.
2. Apply this update following the instructions in this document.



If you are upgrading a version of Saleslogix on Oracle, and your implementation includes or will include Outlook sync or Saleslogix Mobile, you must also install SLX v8.1 Core 02.

Issues Fixed in This Update

SNC Update 02 for Saleslogix version 8.1 addresses the following issues:

Defect	Description
13091806	In the Saleslogix Windows Client Opportunity list view, when a record is highlighted the text changes to white.
13093053	OnExitControl Events do not execute in the SalesLogix Windows Client.
13093107	Users that have the File Attachment option disabled under Function Security can still attach files to Notes.
13093442	TEFS are not created for any records inserted or updated via an external source using the SLX provider and therefore the records do not synchronize.
13093639	In the Saleslogix Windows Client Calendar, the Leader is not displayed in the tool tip when hovering over a personal activity.
13093647	In the Saleslogix Windows Client, ticket activities display encoded characters in the preview.
13093734	In the Saleslogix Windows Client, database changes for leads are not recorded.
13093739	Logging an Outlook e-mail to history using SendSLX for multiple leads only records a history record for the lead that comes first alphabetically.
13093850	The SQL statements generated for groups created in the Saleslogix Windows Client Query Builder with condition operators “does contain data” or “does not contain data” do not include empty strings.

Defect	Description
13093914	In the Saleslogix Windows Client when performing a mail merge on a group of contacts with specific conditions the error "No value given for one or more required parameters" occurs.
13094079	In the Saleslogix Windows Client new tickets marked for "Submit for SpeedSearch" are not returned for any user except Admin.
13094154	The Saleslogix Windows Client loses focus when inserting a ticket if other applications are open.
13094373	The Notes/History grid in the Saleslogix Windows and Web clients returns queries on all Ticket, Account, Contact, Opportunity, and Lead entities no matter what entity is viewed.
14094606	In the Architect Bundler, saving a bundle with a plugin that contains Cyrillic characters in the name causes an error.
14094813	Deprecate Application.BasicFunctions.GetGroupSQL() from reports and replace with Application.BasicFunctions.GetGroupSQLEx() that includes group parameter information.
14094815	Update System to use Application.BasicFunctions.GetGroupSQLEx() for reports.
14094816	Deprecate Application.BasicFunctions.GetGroupSQLInfo() from reports and replace with Application.BasicFunctions.GetGroupSQLInfoEx() that includes group parameter information.
14094819	Modify the Address Labels Count button and group SQL failsafe logic to handle group parameters.
14094820	Modify the Mail Merge Count button logic to handle group parameters.
14094821	Modify Opportunity:SLX OnOpen Opportunity Statistics Report to handle scenarios where a group includes parameters.
14094888	In a Saleslogix Windows Client with UK regional settings, groups with date conditions return incorrect results.
14094892	In the Architect, LookupEdit controls using the LookupRestrictOperator IN do not return results.
14094896	Reports based on groups that use an IN condition for a Unicode field in the group creates parameters for any values in the IN clause, but do not generate the corresponding Crystal parameters. This causes the RecordSelectionFormula to include parameter names that have not been replaced.
14094901	Deleting a custom picklist from the Saleslogix Administrator or Architect causes the error "List index out of bounds (-1)".
14094903	Running a report using a group that includes an IN clause with numeric values causes the error "A numbered range is required here".
14094930	There is no warning that there may be undesirable results in Report Manager when adding more than one group condition that requires the creation of a Crystal CommandTable.
14094968	The Contact:Web-Enabled Contacts group fails to load.
14094981	In the Saleslogix Windows Client, if a report is created using a group condition where "equal to" is set to an empty string, then the error "The types of the parameter field and parameter field default values are not compatible" displays.
14095021	Formatting on a DateTimeEdit picklist is incorrect after upgrading to v8.0 if the

Defect	Description
	ReadOnly property is set.
14095025	The security wrapper does not work if you use the OR operator in group conditions.
14095049	Copying a group with :Date, :Time, :UserID, :Now, or :OwnerID parameter does not carry over the parameters to the copied group correctly. The copied group no longer includes the parameters. Instead it includes the values that were used to replace the parameters.
14095050	The :Time parameter is incompatible with Crystal Reports, because it expects the database field to be a TIME field and Saleslogix uses DateTime only.
14095051	Report conditions that use the :Date and :Time parameters are not converted to ISO format, which prevents UTC conversion.
14095075	In a localized environment on an Oracle database, the :Database Connections option in Speed Search Service Configuration Manager is disabled after clicking the Refresh Connection List button.
14095114	Groups that include an IN clause of string values that contain Unicode fail.
14095152	SpeedSearch causes the error "GetIndexFolderSize Error: Access violation at address 00405343 in module 'SLXSearchService.exe' to display.
14095168	Enable Oracle support.
14095173	If the connection to the shared MSG location is interrupted, Saleslogix does not retrieve the MSG files when the connection is restored. Saleslogix must be closed and then reopened.
14095220	The SLX OLEDB provider should return or expose the real HResult instead of DB_SEC_E_AUTH_FAILED when appropriate.
14095221	Applying the 8.0 to 8.1 upgrade bundle to an Oracle database displays the error "Creating Index (index name): ORA-00972: identifier is too long".
14095222	Enhance the SQL generation to use OFFSET/FETCH for SQL Server 2012 for paged queries.
14095228	The MSSQL specific NEWID() function fails for Oracle in the SLXConversionUtility.
14095238	Remove Intellisync references from help.
14095257	CreateOracleViews.sql and CreateOracleIndexes.sql scripts are no longer required after creating an Oracle database.
14095331	When an activity, including recurring activities, is completed a new globalsyncid should be generated in the History table.
14095334	In a localized environment, if Day Light Saving Time is selected and the time zone is Brasilia or Santiago, the SalesLogix Administrator stops responding.
14095409	The internal class used by Saleslogix to set parameters on a report is failing to set parameters.
14095516	SpeedSearch error GetIndexFolderSize Error: Access violation at address 00405343 in module 'SLXSearchService.exe' appears in the Event log.

Previously Fixed Issues

SNC Update 02 for Saleslogix 8.1 contains fixes released in previous updates.

SNC Update 01 for Saleslogix version 8.1 addresses the following issues:

Defect	Description
13092631	In a Russian localized Saleslogix Windows Client, corrupted characters display in the "Lookup Account" window.
13092633	In a Russian localized Saleslogix Windows Client, corrupted characters display in the Status field of the Insert Opportunity window.
13093030	Cannot edit a tab in Administrator in a French localized environment with extended characters.
13093056	Enables support for Saleslogix Network Client reports.
13094034	A "List index out of bounds" error message displays after setting up a new group with specific operators and values.
13094080	Usernames with accents do not display correctly in Architect.
13094127	Cannot "Send as" another user when using Mail Merge in the Saleslogix Windows Client.
13094300	In the Saleslogix Windows Client Query Builder, duplicate values display when a user selects CONTACT.TYPE in a Contact group.
13094329	Groups created in the Saleslogix Windows Client that use Float, Currency, DateTime, or Decimal parameters will give an invalid result when the group is executed in the Web Client.
13094332	Groups that have DateTime parameters are passed as locale specific DateTime strings (e.g. string of '9/16/2008 10:27:00 AM') instead of as DateTime parameter values or ISO DateTime strings.
13094359	In a German localized environment, SQL Statements executed in the Administrator return untranslated German extended characters.
13094360	In a localized environment, pick lists with extended characters are not inserted correctly from a bundle.
14094598	When adding or modifying a column header in the Saleslogix Windows Client accented characters do not display correctly.
14094634	When adding a calculated field based on specific conditions to a group layout, the error "The following SData diagnosis occurred:.." occurs.
14094653	In the Outlook Connection Options view, the Use Windows Authentication check box label is truncated.
14094778	In a French or German localized environment, the Architect help does not open.
14094869	When synchronizing contacts and activities to Outlook using Outlook Sync, the CreateSource is set to GoogleSync instead of Outlook Sync.
14094885	Query Builder groups created with date/time as a condition display the error "Error parsing within parameter" error.

File Information

This update may include .pdb files which are not listed in the following table. These files are included to provide additional logging information for troubleshooting purposes.

File Name	File Contents	File Version
SLX_v810_SNC_Update_02.zip	SLX_v810_SNC_Update_02.exe	
	Saleslogix v8.1.0 Update 02.sxb	
SLX_v810_SNC_Update_02.exe	Admin.chm	
	Admin.exe	8.1.0.1253
	Architect.chm	
	Architect.exe	8.1.0.1253
	Integrations.chm	
	SalesClient.chm	
	SalesLogix.exe	8.1.0.1253
	Saleslogix.Reporting.API.dll	8.1.0.1154
	SLXControls.ocx	8.1.0.1253
	SlxConversionUtility.exe	8.1.0.1177
	SLXDBEngine.dll	8.1.0.1253
	SLXEventMessage.dll	8.1.0.1253
	SLXHistorySecurityExtension.dll	8.1.0.1253
	SLXLoggingObj2.dll	8.1.0.1253
	SLXMMEngine.dll	8.1.0.1253
	SLXMMGUI.dll	8.1.0.1253
	SLXOLEDB.dll	8.1.0.1253
	SLXOptions.dll	8.1.0.1181
	slxotl32.dll	8.1.0.1253
	SLXOutlookSync.chm	
	SLXPROFILING.dll	8.1.0.1253
	SLXSearchService.exe	8.1.0.1253
	SLXServer.exe	8.1.0.1253
	SlxSL.dll	8.1.0.1253
	SLXSpeedSearch.dll	8.1.0.1253
	SLXSystem.dll	8.1.0.1253

File Name	File Contents	File Version
	SLXSystem.exe	8.1.0.1253
	SLXTriggers.dll	8.1.0.1253
	SpeedSearchConfig.exe	8.1.0.1253
	SyncClient.exe	8.1.0.1253
Saleslogix v8.1.0 Update 02.sxb	<p>Changes to forms:</p> <ul style="list-style-type: none"> • Lead : Notes-History • System : Manage Targets • System : Opportunity Statistics • System : SLX Report Manager View • System : Update Multiple Opportunities 	
	<p>Changes to Global Scripts:</p> <ul style="list-style-type: none"> • System : Opportunity Management 	
	<p>Changes to VBScripts:</p> <ul style="list-style-type: none"> • Dashboard : Content Set Support • Opportunity : SLX OnOpen Opportunity Statistics Report • System : Notes History Common • System : SLX Crystal Report- • System : SLX Lead Support • System : SLX Report Condition Builder Controller • System : SLX Report Conditions • System : SLX Report Controller 	
	<p>Creates indexes:</p> <ul style="list-style-type: none"> • Index GLOBALCHANGETRACKING_CHGTYPE on GLOBALCHANGEDTRACKING (CHANGETYPE) • UNIQUE Index DBOBJECTDEF_OBJECTNAME_DBTYPE on DB_OBJECTDEFINITION (OBJECTNAME, DATABASETYPE) • UNIQUE Index GLOBALCHNAGETRACKING_COMP_KEY on GLOBALCHNAGETRACKING (ENTITYID, USERID, TABLENAME, CHNAGETYPE) 	
	<p>Executes SQL</p> <ul style="list-style-type: none"> • DELETE FROM sysdba.SLXOLEDBPLUGINDATA • Exec('DROP INDEX DBOBJECTDEFINITION_OBJECTNAME_DBTYPE ON sysdba.DB_OBJECTDEFINITION') • Exec('DROP INDEX GLOBALCHANGETRACKING_CHANGETYPE ON sysdba.GLOBALCHANGETRACKING') 	

File Name	File Contents	File Version
	<ul style="list-style-type: none">Exec('DROP INDEX GLOBALCHANGETRACKING_COMPOSITE_KEY ON sysdba.GLOBALCHANGETRACKING')	
	Insert record: <ul style="list-style-type: none">SLXOLEDBPLUGINDATA (SYST0000000B)	

Applying the Update

Install this Update to all computers where Saleslogix is installed.

Before installing the Saleslogix v8.1.0 Update 02.sxb 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 Saleslogix applications on the computer to which you are applying the Update.
2. Extract the contents of the **SLX_v810_SNC_Update_02.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **SLX_v810_SNC_Update_02.exe**.
4. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.

Automated installations can be used to install the Saleslogix Client for new users. When the automated installation is updated using this method, it contains the initial version of the Saleslogix Client and all service packs and updates applied to your system.

6. On the **Completed** screen, click **Finish**.

Finding Script Changes

Changes to 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 Saleslogix script changes in this release. Then, use that information to update your custom scripts with the Saleslogix changes, or add your customizations to the 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 Saleslogix changes with your customizations.

Installing the Bundle Using the Saleslogix Administrator

Use the Saleslogix Administrator to install the Saleslogix v8.1.0 Update 02 bundle.



Before installing the update bundle, create a bundle of all customized plugins in your database. 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 v8.1.0 Update 02**.
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**.