

Removing Help Topics from the Sage SalesLogix Web Client Help

Description: These steps explain how to remove help topics from the Sage SalesLogix Web Client help. You might choose to do this if your organization's customizations have removed some functionality from the Web Client or Customer Portal. In addition to removing the topics, you will also need to remove any links connected to those topics from the following locations:

- The Table of Contents – see step 7
- The index – see step 8
- Other topics – see steps 9 and 10

Note: If you choose to remove Sage SalesLogix help topics, you will need to repeat these steps each time you upgrade your installation to a new version of Sage SalesLogix.

Versions: These steps apply to Sage SalesLogix Web Client and Customer Portal versions 7.5.2 and later.

To remove Web help topics

1. Identify which topics you want to remove and make a note of the file names.
2. In the Application Architect, open the portal from which you want to remove the help topic.
3. In the Project Explorer tree view, expand **SupportFiles**.
4. Expand **help**, and then expand **Content**.
5. Do one of the following:
 - To delete individual topics, right-click the topic to be removed and select **Delete File**. Repeat for each topic to be removed.
 - To delete a folder and any contents, right-click the folder and click **Delete Folder**. Repeat for each folder to be deleted.
6. When you have finished deleting files or folders, click **Save All**.
7. To remove links to removed topics from the table of contents:
 - a. In the Project Explorer tree view, expand **SupportFiles\help\Data**.
 - b. Double-click **TOC.xml**.
 - c. Search for and remove any links to topics you removed in step 6. To remove a link, delete everything between and including the **<** and **>**. For example, you would remove this entire line:

```
<TocEntry Title="Deleting an Account" Link="/Content/Accounts/Test.htm" />
```
 - d. Repeat steps a-c for each table of contents link you want to remove.
 - e. When finished, save your changes.
8. To remove Index links that connect to topics you have removed:
 - a. In the Project Explorer tree view, expand **SupportFiles\help\Data**.
 - b. Double-click **index.xml**.

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- c. Search for and remove any index entries that connect to topics you removed in step 6. To remove an entry, delete everything between and including the **<IndexEntry Term** and **</IndexEntry>**. For example, you would remove this entire entry:

```
<IndexEntry Term="Test">  
    <Entries/>  
    <Links>  
        <IndexLink Title="Test" Link="/Content/Test/test.htm#kanchor10000"  
            UsedConditions="" />  
    </Links>  
</IndexEntry>
```
 - d. Repeat steps a-c for each index entry that you want to remove.
 - e. Count the number of index entries you removed.
 - f. Decrease the number after **<CatapultTargetIndex Count=** (located near the top of the index.xml file) by the number of index entries you just deleted.
 - g. Save your changes.
9. Perform a search for and note any links to the topics you removed.
 - a. Browse to the generated help files for each portal located in \\Inetpub\wwwroot.
For example \\Inetpub\wwwroot\SlxClient\help
 - b. Right-click the **help** folder and select **Search**.
 - c. In the **Search Results** left pane, in the **A word or phrase in the file** box, type the name of the deleted file including the ".htm" file extension.
For example, slxoverview.htm
 - d. Click **Search**.
 10. Open each file and remove any links to the removed help topic.
 - a. In the Application Architect, open the portal for editing.
 - b. In the Project Explorer tree view, expand **Support Files\help\Content**.
 - c. Open the subfolder that contains the help topic you want to edit, and then double-click the topic you want to edit.
 - d. In the help file, find the link you want to delete.
For example, ""
 - e. Press **Delete**.
 - f. When you have finished removing links, click **Save All**.
 11. Repeat steps 9 and 10 for each help topic you removed.
 12. Remove any help buttons that link to a removed help topic:

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Note: This step is not necessary if the form containing the help button has been removed.

- To remove a help button from a custom form:
 - a. Open your custom form in the editor of your choice.
 - b. Find and delete the PageLink control that is similar to the following:

```
<SalesLogix:PageLink ID="InkTestHelp" runat="server" LinkType="HelpFileName"
ToolTip="<%%$ resources: Portal, Help_ToolTip %>" Target="Help"
NavigateUrl="customview"
ImageUrl="ImageResource.axd?scope=global&type=Global_Images&key=Help_16x16">
</SalesLogix:PageLink>
```
 - c. Save your changes.
- To remove a help button from a quick form:
 - a. On your Web Server, browse to and open the **WebHelpConfiguration-91954CEA-EAB9-4fbf-97DA-B11E4BE4EF1C.xml** file.
 - b. Search for the name of the quick form that is linked to the help topic you want to remove and delete everything in between and including **<HelpFileName></HelpFileName>**.

For example, `<HelpFileName>mycustomformview.htm</HelpFileName>`
 - c. Save your changes.

13. To remove help topics from multiple portals, repeat steps 2 through 12 for each portal.

Note: Your changes will not be visible until you do a full build and deploy the changes to your Web site.