



# Applying SNC Update 08 for Version 8.1

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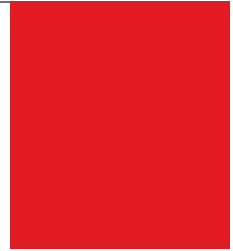
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# Introduction



Saleslogix, now Infor CRM, is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

## About this guide

This document describes SNC Update 08 for version 8.1. SNC Updates provide modifications to pieces such as the Provider, SLXServer, Admin, Architect, Windows 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, Server, or SpeedSearch.

## Prerequisites

The following software must be installed before installing this update:

- Saleslogix version 8.1



Do not install SNC Update 08 for 8.1 on any other version.

## Additional considerations

- Environments with Remote Clients running Infor CRM Xbar for Microsoft Outlook or Outlook sync must install SNC, Core, and Model Update 08 for version 8.1 on the Web Server in order to copy necessary files from the Web Server to each Remote Client.
- Installations using a non-Unicode (ANSI) MSSQL database will need to install or re-install the Infor CRM v8.1.0 Triggers ANSI MSSQL.sxb. See ["Additional Bundle for Non-Unicode \(ANSI\) MSSQL Databases "](#) on page 27 for specific steps.

## Installing the Reporting Assistant

The Reporting Assistant was introduced in 8.1 SNC Update 03 to enable running reports with dynamic parameters on the Web Client. As part of 8.1 SNC Update 03 or later, the Reporting Assistant is installed on any machine where the Architect is installed. For the Reporting Assistant to function correctly, Application Architect must also be installed on the same machine before applying 8.1 SNC Update 03. For instructions on installing the Application Architect, see the *Saleslogix v810 Implementation Guide*.

## Contacting Infor

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# Chapter 1

## Changes in this Update

# 1

This chapter lists all of the changes to Infor CRM (Saleslogix) since version 8.1.



Updates are cumulative, so Update 08 includes content from all previous 8.1 updates including Update 04. Update 8.1.0.04 was not generally available, it was reserved for a Cloud update.

## Features added in this update

SNC Update 08 for Saleslogix version 8.1 includes the following new features:

### Windows Client

- Improvements to Reporting performance
- Outlook sync and the Outlook Integration features that were previously included in the Windows Client have been moved to Infor CRM Xbar for Microsoft Outlook. This requires Xbar version 1.3.1 or later.

## Features added in previous updates



- SNC Update 08 includes SNC Update 02 which added support for v8.1 to run against an Oracle database.
- If your implementation includes Outlook sync or Mobile, you must also install 8.1 Web Core Update 02 or later.
- Saleslogix is now Infor CRM. Look for the new branding in this release and future releases. All references to the CRM Core product, CRM Clients, Web Client, Windows Client, Administrator, and database refer to Saleslogix versions between 8.0 and 8.1 update 03b unless otherwise specified.



See the “What’s New in this Release” topic in the online Help systems for more information about the new features.



## Issues fixed in this update

SNC Update 08 for Infor version 8.1 addresses the following issues:

Defect	Description
INFORCRM-4326	An error occurs if a sales process includes a to-do activity with an ampersand in the Regarding field.
INFORCRM-4530	Synchronization does not update triggers in remote databases.
INFORCRM-5217	Web Client Address Labels do not print in the correct format.
INFORCRM-5698	The database creation process should identify views with dependencies.
INFORCRM-6243	Have the Admin.exe create a log file regarding the cutting of a remote database.
INFORCRM-6563	Duplicate view names retrieved during cut remote process causes an error when views were applied to remote.
INFORCRM-6564	Problems with dependent views when cutting a remote.
INFORCRM-8007	Crystal Reports API is not exposed.
INFORCRM-8841	Crystal reports queries fail, returning a blank page when the same report is run a second time
INFORCRM-8941	Improve Crystal Reports performance.
INFORCRM-9599	MemCache is required for Network Remote to successfully connect to Sdata portal.

## Issues fixed in previous updates

SNC Update 08 for 8.1 contains fixes released in previous updates.

SNC Update 07 for version 8.1 addresses the following issues:

Defect	Description
14094892	In Architect, a Lookup control with a LookupRestrictOperator of IN does not return results.
15097706	In the 8.1 SNC Update 05 documentation, the steps for Refreshing Image Cache has an incorrect path for Windows Server 2012.
15098049	Sync Client does not update triggers in remote databases.
15098071	When the Mail Merge option "Save copy in Sent Items" is selected a copy is not saved, but when the option is cleared a copy is saved.
15098082	Applying an SSL certificate to the HTTP Sync site causes sync jobs to fail with the error "Failed to send file. The Action must be retried".
15098217	Using a custom lookup on an Integer field without a value causes the error, "Exception EOleException: Application uses a value of the wrong type for the current operation".
15098304	On an Oracle database, the Infor CRM v8.1.0 Update 06.sxb has an action that fails.
15098327	Account, Contact, and Address triggers cause database deadlocks.
15098372	Unable to parse xml in a particular scenario when using Outlook Sync.
15098373	In a localized environment, corrupted characters appear when customized pick list has umlauts.
15098520	The Account Whats New tab does not display city and state values.
15098789	Exporting a group with certain conditions to a file causes the error "Ambiguous column name 'Timeless'".

SNC Update 06 for version 8.1 addresses the following issues:

Defect	Description
14094958	On the Web Client, when the Activities Time Frame Filter is used, the following error displays, "We're sorry, you've encountered an error. If applicable, please try again. HTTP status. Internal Server Error (500)."
14096831	Previewing a Territory Realignment using a custom group displays the message "No Accounts to realign" instead of a list of records.
15097747	On the Web Client, the Timeframe filter on the Contact Detail view Activities tab does not work when using SQL 2008 R2.
15097802	Remove SLXRN from the provider for SQL2012.
15097842	On the Outlook Options, Connection tab, Xbar requires that the connection URL includes "/sdata".

SNC Update 05 for version 8.1 addresses the following issues:

Defect	Description
13091852	In an Oracle environment, when users with full Administrative Role privileges attempt to create a user from a template, the error "Access Denied - Administrator Access required" displays.
13093779	Remote databases upgraded from a version prior to 8.1 are missing views.
13094101	In the Windows Client, SpeedSearch does not search on the History entity.

Defect	Description
14095573	Ticket Activity "Charge Type" picklist does not return results when using the "Starting With" or "Contains" operators.
14095768	The legacy GetPropertyOf function returns corrupted characters.
14095845	In a localized Windows Client, the Dashboard Options view displays corrupted characters.
14096145	Importing Leads in the Windows Client causes the error "An error occurred executing active form script (System:ImportLeads) Error calling method cmdImportClickconverters".
14096203	The Reporting Assistant should be localizable.
14096388	When adding a group to a campaign using the "Add from Group" option, the error "An error occurred executing active form script (System:Manage Targets)" occurs.
14096404	In the Windows Client with UK regional settings, if the Campaign Manage Targets dialog box uses a group that is based on a modified date that is not in the standard US or UK date format, an error occurs.
14096418	In a German localized Windows Client with Advanced Outlook Integration, the Invite Contact email corrupts extended characters.
14096424	In a German environment or an environment with German regional settings, the Literature Requests view displays corrupt characters.
14096439	In a Korean Windows Client, some toolbar characters corrupted.
14096528	In a localized Windows Client, extended characters in the Mail Merge dialog box are corrupt.
14096544	In a localized Windows Client, extended characters entered in the Toolbars Editor are corrupt.
14096583	Any user should be able to log on to the Reporting Assistant.
14096605	When the database connection is changed in Application Architect or the Reporting Assistant the extended properties are updated for all connections in the registry under HKEY_CURRENT_USER\Software\SalesLogix\ADOLogin to include TIMEZONE=NONE.
14096625	The Administrator help needs to specify that Advanced Outlook Integration and Outlook Sync are not compatible and may cause duplicates if both are running.
14096670	In the Administrator, Execute SQL does not show the contents of Blob fields.
14096686	The Xbar Go to SLX does not work if the Windows Client takes too long to open or if a dialog box displays upon opening.
14096687	The Xbar Go to SLX sometimes opens the Windows Client in the background.
14096748	The Administrator help Windows Authentication steps need to be updated.
14096749	In the Architect, setting a function argument for a new toolbar button causes the error: "Internal Error: OnCreateNodeClass. ItemClass must inherit from TTNTTreeNode."
14096756	In a localized Windows Client extended characters entered in the Lead Detail view Notes are corrupted.
14096772	Query Builder View SQL for new group displays ValueParam0 instead of the condition value.
14096842	Upgrading a Remote Client from 7.5.4 to 8.1 and then using the Outlook sync Connection options Test button in Outlook causes the error "Invalid table name" to occur because the Outlook sync options views were not in the remote database before the upgrade.
14096877	In a localized Windows Client, some labels do not display on the Add Contact/Account Information dialog box.
14096879	In a Russian localized Windows Client, extended characters are corrupt on the Schedule Phone Call and Schedule Meeting dialog boxes.

Defect	Description
14096895	In a French localized Windows Client, an error occurs during a lead import when inserting matching fields.
14096904	In a French localized Windows Client, extended characters are corrupt in Notes/History tab records.
14096910	In the Administrator, when adding Network users and importing user information from Windows the list may be empty.
14096919	In a German environment or an environment with German regional settings, extended characters are corrupt in the Literature Request cover letter created from a mail merge.
14097018	Running silent parameter installs does not install patches automatically.
14097020	In the Architect, when a label is set to enabled=false using code the label does not redraw when the enabled is set back to true.
14097027	In a localized database, the Lead Source Status is not translated.
14097044	Modify the Windows Client, Administrator and other executables to correctly handle the UTC offsets.
14097081	Changing the contact on an activity does not save and reverts back to the original contact.
14097153	In a Russian localized environment, when installing a bundle on a Russian operating system Cyrillic characters appear corrupted.
14097182	Outlook integration does not offer an option for using ad hoc groups as distribution lists.
14097201	The policy.8.1.Sage.SalesLogix.NetExtensions.Framework.dll needs to be rebuilt whenever the Sage.SalesLogix.NetExtensions.Framework.dll is rebuilt.
14097270	Include the localization resource file for the Reporting Assistant.
14097314	SLXLoggingTrigger.dll does not have a file version or copyright.
14097352	Rebrand CRM views in Microsoft Outlook.
14097368	Rebrand the Sales Client.
14097442	In a Russian environment, the Architect Project Manager is blank.
14097523	In the Administrator, rebrand Send SLX to Send to CRM in the Outlook options.
14097536	In the Architect, when a Widget type plugin has a family value, the value does not display which causes problems when trying to update the plugin
14097541	In Outlook, replace the icons for Record to History, Sync Now, Options and Send to CRM.

SNC Update 03b for version 8.1 addresses the following issues:

Defect	Description
11083340	In the Windows Client, dragging and dropping an email to Ticket Activities displays the Complete E-Mail dialog window twice.
12090172	In a localized environment, in the Administrator, the Visible Columns dialog box does not display extended characters correctly.
12090554	In a localized Windows Client, corrupted strings appear in the Confirm Activity dialog box.
12090931	In a localized Windows Client, in the Defect detail view Tickets tab, some extended characters do not display correctly.
13091236	In a localized Windows Client the Toolbars Editor Arguments drop-down list contains corrupted strings.
13091316	In a localized Windows Client, extended characters do not display correctly in the Confirmation dialog box Notes field.

Defect	Description
13091909	In a localized environment, Cyrillic characters are not saved correctly when creating SpeedSearch indexes.
13092054	In a Russian localized environment, some labels in the Architect Manage Plugins dialog box do not display correctly.
13092110	When a create user is a Offline Web Client user, the host database sends inserts for newly created records back to the user who created the record.
13092278	In a Korean Windows Client, the Calendar Month view labels do not display correctly.
13092634	In a Russian localized Windows Client, the Literature Requests Print Labels drop-down list view contains corrupted text.
13092735	In the Architect, using the Application.BasicFunctions.AddMinutesToDate returns incorrect results over periods longer than 4 days, 15 hours, and 20 minutes (6680 Mins).
13092854	In a Korean Windows Client, the English character "Y" may not display correctly.
13094272	The activity conflict warning does not display when a conflicting activity is scheduled.
13094366	In a localized Windows Client, extended characters do not display correctly in the Ticket Activities Comments preview pane.
13094456	In a localized Windows Client, when viewing or editing an Event, extended ASCII characters in the Location or Notes boxes do not display correctly.
13094457	In a French localized Windows Client in the Activities list view Events tab the Type information does not display completely.
13094458	In a localized Windows Client, corrupted characters appear in the Activity Confirmation Message dialog box.
13094460	In a localized Windows Client, the Literature Requests delete Warning displays corrupted characters.
13094461	In a localized Windows Client, if a timeless activity includes extended characters and an event is scheduled for the same time, the Conflicting Activity notification does not display the extended characters correctly.
13094473	In a localized Windows Client, the Mail Merge Specific Group list contains corrupted characters.
13094475	In a localized Windows Client, if a Mail Merge contact or lead name contains extended characters, then the extended characters in the file title are corrupted.
13094496	The Application Architect help topic "Changing Build Output or Search Path Locations" contains the incorrect build Search path.
14094604	In a localized Windows Client, a corrupted string occurs in Toolbars Editor window after saving a Toolbar Button or Hint with extended characters.
14094639	In a localized environment, the SendSLX Contact Not Found message Subject/Regarding field does not display extended characters correctly.
14094694	In Query Builder, adding a date field condition with the operator 'within the last xxx' causes the error "Error parsing within parameter".
14094728	In a localized Web Client environment, the "Learn more link" on the log on page opens an untranslated help topic.
14094755	Characters with umlauts do not display correctly in the Conflicting Activity notification.
14094916	The Net Extension Manager Help About does not open the correct dialog box.
14094926	In Query Builder, adding a condition with a 'greater than' operator causes a "List index out of bounds" error.

Defect	Description
14094994	In a French localized environment, the Admin help table of contents link to Contacting Saleslogix is broken.
14095020	The SixLoggingTrigger.dll should allocate memory from the heap in a thread safe manner.
14095023	In the Architect, resizing a checkbox or editbox will cause the control to collapse to 0 size.
14095024	Users with Windows Authentication configured who use SpeedSearch to search for Internal Tickets or History get the "Search found no matches" message when results should have been found.
14095026	Cyrillic characters do not display correctly in the Administrator Users List column names.
14095027	Cyrillic characters do not display correctly in the Administrator when adding a team to user.
14095028	Cyrillic characters in a user name do not display correctly In the Administrator when copying a profile.
14095029	Cyrillic characters do not display correctly in the Administrator Realign Territory view.
14095030	Cyrillic characters do not display correctly in Administrator, Systems, Office Profile tab.
14095033	Cyrillic characters do not display correctly in the Administrator System Report.
14095034	Cyrillic characters do not display correctly in the Administrator Edit Lookups Layout view.
14095141	When more than two databases are set up to be indexed by one SpeedSearch Server, and most incremental indexes are scheduled to build at the same time, dtSearch will fail.
14095244	In the Query Builder changing the order of conditions causes the error "List index out of bounds".
14095287	If an e-mail with multiple contacts or leads is created from within the Windows Client, and then sent using the SendSLX button a history record is only created for the first contact or lead.
14095290	In a German localized environment, the label on the Outlook Sync Connector Options Logging options is truncated.
14095297	Cyrillic characters in Report names do not display correctly in Architect.
14095315	When new user, who was created from an existing user or template, attempts to log on into the Windows Client, the error "Exception ETimeZoneError: The time zone has not been defined for user..." displays.
14095320	In a Russian localized Windows Client, group names do not display correctly in the Literature Request dialog box.
14095321	In a Russian localized Windows Client, the icons are truncated on the Attachments tab.
14095324	When moving activities on the Windows Client Calendar, the error "Exception EOleException: Failed to parse SQL Exception location [0058B31E](saleslogix.exe) IsBrandingEnabled" displays.
14095370	In a French localized environment, when generating an Opportunity By Account report for the Opportunities Closed-Lost or Closed-Win groups no records are reported.
14095391	In the Windows Client, scheduling an event displays the error "Failed to Parse SQL...IsBrandingEnabled".
14095395	In a Russian localized Administrator applying a bundle displays corrupted characters.
14095404	When using SendSLX, a history record is not created for any CRM contacts or leads if the e-mail is also sent to an e-mail address that is not in the database.
14095429	Create an SlxReport.Optimize() method that removes a pre-defined printer, discards saved data, and forces the option to use indexes or server for speed on each report and sub-report. This method will be called when a report is stored in or extracted from the database to improve report performance.

Defect	Description
14095453	In a Korean localized Windows Client, the Schedule/Edit an Event view contains corrupted text.
14095454	In a Korean localized Windows Client the Calendar Week view event descriptions do not display correctly.
14095476	In a German localized environment the Import Wizard version 8.0 does not support extended characters.
14095516	The application server logs the following SpeedSearch error "GetIndexFolderSize Error: Access violation at address 00405343 in module 'SLXSearchService.exe'".
14095609	In the Windows Client, when using the Contact Advanced Lookup to look up a contact by first and last name, and then either refreshing the view or selecting delete from the Edit menu causes the error "List index out of bounds (1)"
14095651	After applying 8.1 SNC Update 02, selecting Letter Using Template from the Write menu causes the error "The Mail merge engine encountered an error and cannot continue. The parameter "" could not be located for the query".
14095658	In a French localized environment some of the Outlook Saleslogix Connector Options labels are incorrect.
14095659	In a German localized environment some of the Outlook Saleslogix Connector Options labels are incorrect.
14095666	In a Russian localized Windows Client, the names of copied groups listed in the Group Manager display incorrectly.
14095674	The Windows Client loads slowly when a group has a lot of conditions.
14095676	The Integrations list contains duplicate entries.
14095687	In a French localized Architect the Query Builder does not display the "é" character correctly.
14095692	After a report is released to Everyone and a user, the associated Report family shows multiple times in Windows Client for the selected user.
14095709	While building a SpeedSearch index, an error in the SlxSearchService can get stuck in a loop repeating the error every half second.
14095711	The SlxSearchTrigger will create multiple entries in the IndexUpdates table for a single Account change. The entries will be for other indexes that have a relationship to account in some way.
14095713	When multiple threads are attempting to write to the spDelFiles.txt file at the same time the following I/O error can occur in SlxSearchService " Error: IndexThread.Execute Line: 14 Error: I/O error 32".
14095715	In order to limit the number of Indexes that can be built at one time to 5, SlxSearch should spawn no more than 5 active threads at a time, new threads can start when others finish.
14095717	The SlxSearchService should filter queries to IndexUpdates with the indexName to prevent returning more rows than necessary.
14095719	In a localized Windows Client, the Mail Merge History Options view contains untranslated strings.
14095724	Dragging and dropping the Activities tab from the middle pane causes the tab to disappear.
14095746	The SLXConversionUtility is not creating ActivityAttendee records for activities that are associated with leads.
14095748	Errors that occur in the SLXConversionUtility should be written to a log file instead of displaying an error message that causes the SLXConversionUtility to stop.
14095755	Report names that use accented characters are corrupted.

Defect	Description
14095762	In a localized Windows Client the Activity Manager Priority column does not display extended characters.
14095763	In a localized Windows Client NavBar labels may be truncated.
14095785	When replying to an e-mail in Outlook 2013, the edit in place ribbon does not have options for SendSLX, VCards, or Saleslogix Library. The options are only available in an e-mail message if the Pop Out button is clicked.
14095788	Allow administrators to enable or disable each Outlook sync option for contact sync, activities sync or tasks sync separately.
14095809	Template names that contain umlaut characters are corrupted.
14095831	Add dynamic parameter support to the Architect.
14095862	SLXConversionUtility displays an SDataSync error when converting accounts/contacts with apostrophes in the email address.
14095896	When a contact name contains umlauted characters the names are corrupted in the mail merge preview window.
14095910	Activities completed or deleted in the Windows Client are not updated, completed, or deleted in Google
14095912	Create a tool to map dynamic parameter information for running reports on the Web Client.
14095920	On an Oracle database moving a contact that has a literature request causes the error "Error calling method btnOkClick".
14095936	Export to Excel for Assets generates a corrupted Serial Number.
14095937	On a multi-byte database the Rmareceivedproduct Lookup does not return any results.
14095980	Notes that are created in the Mobile client do not display correctly in the Windows client.
14095989	The Import Wizard must support unicode databases and unicode data.
14095991	When creating new user from a profile in the Administrator Cyrillic characters are corrupted in the Region and Division fields.
14096005	After creating a contact with unicode characters, the contact name displays question marks instead of unicode characters in the Contact detail view title.
14096028	On an Oracle database notes/history records do not sync from host database to a remote office.
14096100	In a German environment, one of the items in the Attendee Role picklist needs to be changed.
14096102	Update the Options Sync option topic to add more information about the "On first sync" option.
14096163	The Activities list view is missing the User Calendars button.
14096206	When Application.BasicFunctions.DoInvoke is used the WhenClosed event fires prior to a Report being displayed or opened.
14096207	When performing an e-mail mail merge to a contact with unicode characters the characters do not display correctly in the generated e-mail.
14096269	Integrity Checker tests fail against Oracle database.
14096276	In the Architect a report cannot be checked out in if the report name includes unicode characters.
14096334	In the Web Client, calculated fields are showing question marks instead of unicode characters.
14096335	The Integrity Checker should check for carriage return line feeds in a user's title
14096372	In a Web Client detail view, users are unable to navigate past the 41st record.



Defect	Description
14096387	In a unicode environment the task bar thumbnail view of the Windows Client may corrupt non-Latin characters.
14096392	Replace the Saleslogix icon with a unique icon for Application Architect, Administrator, and Architect.
14096397	The SendSLX Duplicate Contact dialog box does not display unicode characters correctly.
14096425	Single activities completed in the Windows Client result in both a completed activity and the original activity in Google.
14096442	In a localized environment extended characters do not display correctly on the Windows Client Account Detail view.
14096443	In a localized environment the Import Wizard 'Getting Started' dialog box translated header strings do not display.
14096469	In the Administrator extended characters in the 'Execute SQL' Available Remotes list are corrupted.
14096558	In a localized environment, in the Administrator, extended chars are corrupted when applying bundle where action contains extended characters.
14096650	Unable to edit or copy Unicode groups. GroupBuilder does not show an error when an edit fails; it just reloads the group, however an error is shown when copying a Unicode group.
14096773	In the Architect adding a function with an argument to the standard toolbar returns an error.

SNC Update 02 for version 8.1 addresses the following issues:

Defect	Description
13091806	In the Windows Client Opportunity list view, when a record is highlighted the text changes to white.
13093053	OnExitControl Events do not execute in the 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 Provider and therefore the records do not synchronize.
13093639	In the Windows Client Calendar, the Leader is not displayed in the tool tip when hovering over a personal activity.
13093647	In the Windows Client, ticket activities display encoded characters in the preview.
13093734	In the 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 Windows Client Query Builder with condition operators "does contain data" or "does not contain data" do not include empty strings.
13093914	In the 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 Windows Client new tickets marked for "Submit for SpeedSearch" are not returned for any user except Admin.
13094154	The Windows Client loses focus when inserting a ticket if other applications are open.

Defect	Description
13094373	The Notes/History grid in the Windows Client and Web Client 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 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 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 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 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.

Defect	Description
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 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 Administrator stops responding.
14095409	The internal class used 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.

SNC Update 01 for version 8.1 addresses the following issues:

Defect	Description
13092631	In a Russian localized Windows Client, corrupted characters display in the "Lookup Account" window.
13092633	In a Russian localized 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 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 Windows Client.
13094300	In the Windows Client Query Builder, duplicate values display when a user selects CONTACT.TYPE in a Contact group.
13094329	Groups created in the 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.

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Defect	Description
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 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_08.zip	SLX_v810_SNC_Update_08.exe	
	Installing Infor CRM Xbar for Microsoft Outlook.pdf	
	linfor CRM Xbar Setup.exe	
	Infor CRM v8.1.0 Triggers ANSI MSSQL.sxb	
	Infor CRM v8.1.0 Update 08.sxb	
SLX_v810_SNC_Update_08.exe	Admin.chm	
	Admin.exe	8.1.0.1722
	ApplicationArchitect.chm	
	Architect.chm	
	Architect.exe	8.1.0.1722
	Dashboard.chm	
	DataLinkManager.chm	
	DBManager.chm	
	Getting Started with Saleslogix.pdf	
	ImportWiz.chm	
	ImportWiz.exe	8.1.0.1434
	Integrations.chm	
	Interop.SLXReporting.dll	8.1.0.0
	Interop.SLXSystem.dll	8.1.0.0
	MailMerge.chm	
	ManageSalesProcess.chm	
	policy.8.1.Sage.SalesLogix.NetExtensions.Framework.dll	8.1.0.1533
	QueryBuilder.chm	
	ReportingAssistant.chm	
	ReportManager.chm	
	Sage.SalesLogix.DelphiBridge.dll	8.1.0.1227
	Sage.SalesLogix.NetExtensions.Framework.dll	8.1.0.1533
	SalesClient.chm	
Saleslogix Quick Reference for the Customer Service and Support User.pdf		
Saleslogix Quick Reference for the Sales and Marketing User.pdf		
Saleslogix Quick Reference for the Web User.pdf		
SalesLogixAdvancedOutlookIntegration.chm		

File Name	File Contents	File Version
	SalesLogix.exe	8.1.0.1722
	Saleslogix.Reporting.API.dll	8.1.0.1336
	SalesLogix.sxc	
	SlxCILauncher.exe	8.1.0.1533
	SLX Connection Manager.chm	
	SLXControls.ocx	8.1.0.1533
	SlxConversionUtility.exe	8.1.0.1227
	SLXDBChecker.exe	8.1.0.1434
	SLXDBEngine.dll	8.1.0.1573
	SLXDoc.dll	8.1.0.1533
	SLXEventMessage.dll	8.1.0.1573
	SLXHistorySecurityExtension.dll	8.1.0.1253
	SLXLoggingObj2.dll	8.1.0.1253
	SLXLoggingServer.exe	8.1.0.1610
	SlxLoggingTrigger.dll	8.1.0.1533
	SLXMMEngine.dll	8.1.0.1610
	SLXMMGUI.dll	8.1.0.1533
	SLXMonitor.chm	
	SLXNetExtensions.chm	
	SLXNetExtensions.exe	8.1.0.1533
	SLXOLEDB.dll	8.1.0.1573
	SLXOptions.dll	8.1.0.1533
	slxotf32.dll	8.1.0.1610
	SLXOutlookSync.chm	
	SLXPROFILING.dll	8.1.0.1573
	SLXReporting.dll	8.1.0.1434
	SLXReportingAssistant.exe	8.1.0.1258
	SLXReportingAssistant.exe.config	
	SLXSearchService.exe	8.1.0.1434
	SlxSearchTrigger.dll	8.1.0.1434
	SLXServer.exe	8.1.0.1573
	SlxSL.dll	8.1.0.1573
	SLXSpeedSearch.dll	8.1.0.1253
	SLXSystem.dll	8.1.0.1573
	SLXSystem.exe	8.1.0.1573
	SLXTriggers.dll	8.1.0.1573
	SLXUnicode.chm	
	SpeedSearchClient.chm	
	SpeedSearchConfig.exe	8.1.0.1253
	SShttp.dll	8.1.0.1610
	SyncClient.exe	8.1.0.1722

File Name	File Contents	File Version
	SyncServer.exe	8.1.0.1533
<p>Infor CRM v8.1.0 Triggers ANSI MSSQL.sxb</p> <p>Required for non-Unicode MSSQL databases only</p>	<p>Create database objects:</p> <ul style="list-style-type: none"> <li>■ Trigger : MSSQL : ACCOUNT_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : ACCOUNT_INTEGRATION_CHANGE_A</li> <li>■ Trigger : MSSQL : ACCOUNT_INTEGRATION_INSERT_A</li> <li>■ Trigger : MSSQL : ACCOUNT_TOMBSTONE_A</li> <li>■ Trigger : MSSQL : ACTIVITY_INTEGRATION_CHANGE_A</li> <li>■ Trigger : MSSQL : ACTIVITY_INTEGRATION_INSERT_A</li> <li>■ Trigger : MSSQL : ACTIVITYATTENDEE_INTEGRATION_CHANGE_A</li> <li>■ Trigger : MSSQL : ADDRESS_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : ADDRESS_INTEGRATION_CHANGE_A</li> <li>■ Trigger : MSSQL : ADHOCGROUP_INTEGRATION_INSERT_A</li> <li>■ Trigger : MSSQL : ADHOCGROUP_INTEGRATION_TOMBSTONE_A</li> <li>■ Trigger : MSSQL : CONTACT_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : CONTACT_INTEGRATION_CHANGE_A</li> <li>■ Trigger : MSSQL : CONTACT_INTEGRATION_INSERT_A</li> <li>■ Trigger : MSSQL : CONTACT_INTEGRATION_INSERT_A</li> <li>■ Trigger : MSSQL : CONTACT_TOMBSTONE_A</li> <li>■ View : MSSQL : CONTACTSYNCSVIEW</li> <li>■ View : MSSQL : ACCOUNTSYNCSVIEW</li> </ul> <p>Creates Indexes:</p> <ul style="list-style-type: none"> <li>■ UNIQUE IndexSYNCDIGEST_APPID_RESOURCE on SYNCDIGEST (APPID, RESOURCETYPE)</li> </ul>	
<p>Infor CRM v8.1.0 Update 08.sxb</p>	<p>Changes to Dashboard Widgets</p> <ul style="list-style-type: none"> <li>■ System : GroupList</li> <li>■ System : SData Feed</li> <li>■ System : Website</li> <li>■ System : Welcome</li> </ul>	

File Name	File Contents	File Version
	Changes to Forms: <ul style="list-style-type: none"> <li>■ Lead : Notes-History</li> <li>■ System:Add New Contact Account</li> <li>■ System: Import Leads</li> <li>■ System : Manage Targets</li> <li>■ System : MoveContact</li> <li>■ System : Opportunity Detail</li> <li>■ System : Opportunity Statistics</li> <li>■ System : Potential Matches</li> <li>■ System : SLX Report Manager View</li> <li>■ System : Update Multiple Opportunities</li> </ul>	
	Changes to Global Scripts: <ul style="list-style-type: none"> <li>■ System : Global System</li> <li>■ System : Opportunity Management</li> </ul>	
	Changes to Menus: <ul style="list-style-type: none"> <li>■ System : Standard Menus</li> </ul>	
	Changes to Reports <ul style="list-style-type: none"> <li>■ Marketing : Campaign Summary Report</li> <li>■ Opportunity : Closed Opportunities By Account</li> <li>■ Opportunity : Closed Opportunities Summary</li> </ul>	
	Changes to VBScripts: <ul style="list-style-type: none"> <li>■ Dashboard : Content Set Support</li> <li>■ Opportunity : SLX OnOpen Opportunity Statistics Report</li> <li>■ System : Export_Grid_RS_To_Excel</li> <li>■ System : Notes History Common</li> <li>■ System : SLX Crystal Report</li> <li>■ System : SLX Lead Mappings</li> <li>■ System : SLX Lead Support</li> <li>■ System : SLX Report Condition Builder Controller</li> <li>■ System : SLX Report Conditions</li> <li>■ System : SLX Report Controller</li> </ul>	



File Name	File Contents	File Version
	<p>Create database objects:</p> <ul style="list-style-type: none"> <li>■ Trigger : MSSQL : ACCOUNT_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : ACCOUNT_INTEGRATION_CHANGE</li> <li>■ Trigger : MSSQL : ACCOUNT_INTEGRATION_INSERT</li> <li>■ Trigger : MSSQL : ACTIVITYATTENDEE_INTEGRATION_CHANGE</li> <li>■ Trigger : MSSQL : ADDRESS_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : ADDRESS_INTEGRATION_CHANGE</li> <li>■ Trigger : MSSQL : ADHOCGROUP_INTEGRATION_INSERT</li> <li>■ Trigger : MSSQL : CONTACT_INTEGRATION_CHANGE</li> <li>■ Trigger : MSSQL : CONTACT_INTEGRATION_INSERT</li> <li>■ Trigger : MSSQL : CONTACT_INT_INSTEAD_INS</li> <li>■ Trigger : MSSQL : GLOBALCHANGETRACING_IDENTITY_CHK</li> <li>■ Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGE</li> <li>■ Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS</li> <li>■ Trigger : Oracle : ACCOUNT_AFTER_CHANGES</li> <li>■ Trigger : Oracle : ACCOUNT_BEFORE_CHANGES</li> <li>■ Trigger : Oracle : CONTACT_AFTER_CHANGES</li> <li>■ Trigger : Oracle : CONTACT_BEFORE_CHANGES</li> <li>■ View : MSSQL : ACCOUNTSYNCSVIEW</li> <li>■ View : MSSQL : ACTIVITYRESOURCEVIEW</li> <li>■ View : MSSQL : ALTER_DBOBJECTDEFINITION</li> <li>■ View : MSSQL : CONTACTSYNCSVIEW</li> <li>■ View : MSSQL : CampaignTargetsView</li> <li>■ View : MSSQL : DepartmentView</li> <li>■ View : MSSQL : ORMCOLUMN</li> <li>■ View : MSSQL : ORMKEYCOLUMN</li> <li>■ View : MSSQL : ORMTABLE</li> <li>■ View : MSSQL : OwnerView</li> <li>■ View : MSSQL : PACKAGEKITCHILDVIEW</li> <li>■ View : MSSQL : PRODPACKAGEKITVIEW</li> <li>■ View : MSSQL : PickListItemView</li> <li>■ View : MSSQL : PickListView</li> <li>■ View : MSSQL : SALESORDERSYNCSVIEW</li> <li>■ View : MSSQL : SALESQUOTATIONSYNCSVIEW</li> <li>■ View : MSSQL : SLX_PLUGINNOBLOB</li> <li>■ View : MSSQL : SLX_RELEASEDPLUGINS</li> <li>■ View : MSSQL : SYNCSTATUS</li> <li>■ View : MSSQL : TeamView</li> <li>■ View : Oracle : ALTER_DBOBJECTDEFINITION</li> </ul>	

File Name	File Contents	File Version
	<p>Creates Indexes:</p> <ul style="list-style-type: none"> <li>■ Index GLOBALCHANGETRACKING_CHGTYPE on GLOBALCHANGETRACKING (CHANGETYPE)</li> <li>■ UNIQUE Index DBOBJECTDEF_OBJECTNAME_DBTYPE on DB_OBJECTDEFINITION (OBJECTNAME, DATABASETYPE)</li> <li>■ UNIQUE Index GLOBALCHANGETRACKING_COMP_KEY on GLOBALCHANGETRACKING (ENTITYID, USERID, TABLENAME, CHNAGETYPE)</li> </ul>	
	<p>Executes SQL</p> <ul style="list-style-type: none"> <li>■ DELETE FROM sysdba.SLXOLEDBPLUGINDATA</li> <li>■ Exec('DROP INDEX DBOBJECTDEFINITION_OBJECTNAME_DBTYPE ON sysdba.DB_OBJECTDEFINITION')</li> <li>■ Exec('DROP INDEX GLOBALCHANGETRACKING_CHANGETYPE ON sysdba.GLOBALCHANGETRACKING')</li> <li>■ Exec('DROP INDEX GLOBALCHANGETRACKING_COMPOSITE_KEY ON sysdba.GLOBALCHANGETRACKING')</li> <li>■ DELETE FROM sysdba/PICKLIST Where PICKLISTID = 'kSYST0000416 And ITEMID=k6UJ9A0003V1' Or TEXT = 'AdminLink'</li> <li>■ DELETE FROM sysdba/PICKLIST Where PICKLISTID = 'kSYST0000416 And ITEMID=k6UJ9A0003V4' Or TEXT = 'SystemLink'</li> <li>■ DELETE FROM sysdba/PICKLIST Where PICKLISTID = 'kSYST0000416 And ITEMID=k6UJ9A0003V5' Or TEXT = 'User Link'</li> <li>■ DELETE FROM sysdba/PICKLIST Where PICKLISTID = 'kSYST0000416 And ITEMID=k6UJ9A0003V7' Or TEXT = 'Text Item'</li> <li>■ DELETE FROM sysdba.DB_OBJECTDEFINITION Where OBJECTNAME = 'ACTIVITYATTENDEE_INTEGRATION_CHA'</li> </ul>	
	<p>Insert Record:</p> <ul style="list-style-type: none"> <li>■ SLXOLEDBPLUGINDATA (SYST0000000B)</li> <li>■ USEROPTIONDEF [IncludeAttendeesHistoryOptions]</li> </ul>	
	<p>Insert Pick List Integration Type</p>	



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## Chapter 2

# Implementing Version 8.1 on an Oracle Database

SNC Update 02 for version 8.1 added functionality to enable v8.1 to run on an Oracle database. These steps are only required for implementations of version 8.1 on an Oracle database. If your implementation uses a SQL database or you already performed these steps in a previous update, skip the following steps and proceed to ["Installing the update"](#).

## Installing version 8.1 on Oracle for the first time

If you are installing version 8.1 on Oracle for the first time, use the following steps.

### To install version 8.1 on an Oracle database

1. Install version 8.1 by following the instructions in the *Saleslogix v810 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 install media. New Oracle.dmp files are available in the SLX\_v810\_Oracle\_Database.zip on the Infor CRM 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 and log on as the Oracle sys user.
    - 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 install media.
    - 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 v8.1 SNC 08.

## Upgrading on Oracle

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

### To upgrade to version 8.1 on an Oracle database

1. Follow the instructions for upgrading your 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 from a prior version on Oracle, and your implementation includes or will include Outlook sync or Mobile, you must also install v8.1 Core 02 or later.

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# Chapter 3

## Applying the Update

# 3

Apply this Update to all computers where Saleslogix is installed.

Before installing the Infor CRM v8.1.0 Update 08.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.

### Installing the update

#### 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\_08.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **SLX\_v810\_SNC\_Update\_08.exe**.
4. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.

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

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

### Finding script changes

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

## Installing bundles using the Administrator

Use the Administrator to install the Infor CRM v8.1.0 Update 08 bundle.



Before installing the update bundle, create a bundle of all customized plugins in your database. Your customized plugins will not be overwritten, 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 **Infor CRM v8.1.0 Update 08.sxb**.
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**, **Yes to All**, or **OK** on any confirmation message boxes for overwriting system plugins or indexes.
7. In the **Choose Teams** dialog box, select the teams to which you want to release plugins, and then click **OK**.

### Additional Bundle for Non-Unicode (ANSI) MSSQL Databases

If your implementation uses a non-Unicode, MSSQL database then you must install the Infor CRM v8.1.0 Triggers ANSI MSSQL.sxb bundle. This bundle adds triggers specific to non-Unicode databases. The Unicode triggers are included in the Infor CRM v8.1.0 Update 08.



You must apply this bundle even if you already applied it during a previous update.

### 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 **Infor CRM v8.1.0 Triggers ANSI MSSQL.sxb**.
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**.

## Providing Infor CRM Xbar for Microsoft Outlook to the Infor CRM Users

The Infor CRM Xbar Setup.exe is included in the SLX\_v810\_SNC\_Update\_08.zip. Infor CRM Windows Client users must manually launch the install. To make the install available to users, do the following:

### To share this file

- Copy the **Infor CRM Xbar Setup.exe** to a convenient location and share that location with your users.

## Communicating installation instructions

You must provide your users with the appropriate installation instructions.

### To install Infor CRM Xbar for Microsoft Outlook

1. Browse to the location provided by your Infor CRM Administrator and copy the **Infor CRM Xbar Setup.exe** to any convenient folder.  
Ensure you have Write permissions to the folder where you are saving the file. You can check permissions on the Security tab on the folder properties. Ensure the folder path is as short as possible, as there is a 57 character limit.
2. Click **Infor CRM Xbar Setup.exe** , and then click **Install**.

## Providing connection credentials

Users will require connection strings, user names, and passwords to be able to successfully sign into Xbar. Share the following information with each of your Xbar users:

- **User Name:** Type your username. This is the username you use to log on to the CRM Clients.
- **Password:** Type your password. This is the password you use to log on to the CRM Clients.
- **Service URL:** This is the URL for your SData portal. For example: `http://web.address.com/Sdata`.
- **Service URL for Remotes:** This is the URL for your SData portal. For example:  
`http://localhost:8087/web.address.com/Sdata`.
- **Client URL:** This is the URL for your Windows or Web Client. For example, `http://web.address.com/SLXClient`.
- **Client URL for Remotes:** This is the URL for your Remote Client/Offline Client. For example,  
`http://localhost:8086/web.address.com/SLXClient`

The first time Microsoft Outlook is opened after installing Infor CRM Xbar, each user will be invited to configure the Outlook Connector. Instruct users to follow the instructions in the Online Help topic provided.



## Updating the Integrity Checker Library

8.1 SNC Update 03b includes a new Integrity Checker test. If you have opened the Integrity Checker since installing version 8.1, then you must perform the following steps in order to receive the updated Integrity Checker library.



If you updated the Integrity Checker library for a previous update skip the following steps and proceed to "[Refreshing the Image Cache](#)".

### To update the Integrity Checker library

1. On the computer where the Integrity Checker is installed, browse to **C:\ProgramData\SalesLogix\Integrity Checker**.
2. Rename the existing **SalesLogix.sxc** file
3. Open Integrity Checker to automatically create the new library file.
4. If you have customized the Integrity Checker library, then you must merge the differences between the SalesLogix.sxc file renamed in step 2 and the new SalesLogix.sxc created in step 3 using a text editor of your choice.

## Refreshing the Image Cache

8.1 SNC Update 08 includes new icons for the Administrator and Architect and 8.1 Web Core Update 08 includes a new icon for the Application Architect. In order for the new icons to appear on Windows 8 or Windows Server 2012, it may be necessary to refresh the icon cache.

If you refreshed the image cache for a previous update you do not need to complete the following steps.



If your installation will also include Web Core Update 08, you can wait to complete these steps until after you have installed Web Core Update 08. These steps are also available in the *Applying Web Core Update 08 Version 8.1* document.

### To update the icon cache

1. Log on as the local administrative user to the machine that has the Administrator, Application Architect, or Architect installed.  
This must be the Windows administrator user. Users that are just part of the Administrators group may not have the necessary permissions.
2. Open a command window and do one of the following:
  - a. For 2008 - Type **cd C:\Users\[User].[Domain]\AppData\Local**.  
Replace [User] with the Windows user for whom the CRM Core product is installed on the machine, for example WebDLL and replace [Domain] with the domain extension for the user.
  - b. For 2012 - Type **cd C:\Users\[User]\AppData\Local**.  
Replace [User] with the Windows user for whom the CRM Core product is installed on the machine, for example WebDLL.
3. Close all programs running on the machine, including Explorer.  
To close Explorer, open Task Manager, open the Details tab, in the list right-click explorer.exe and click End Task.
4. In the command window, type **del iconcache\*** and then press **Enter**.
5. Type **shutdown /r** to reboot the machine.

The Start menu may not be visible until you reboot.

- Repeat for each machine that has the Administrator, Application Architect, or Architect installed.

## Using the Reporting Assistant to Map Dynamic Parameters

The Reporting Assistant was introduced in 8.1 SNC Update 03 to support reports with dynamic parameters on the Web Client.

In order to run reports with dynamic parameters on the Web Client, you must map any dynamic parameters. The Reporting Assistant identifies dynamic parameters for you and enables you to map them to the appropriate tables and fields.

Once you have identified and mapped all of the dynamic parameters, you will not have to map them again. If you create a new report or edit an existing report, use the Reporting Assistant to identify and map any new dynamic parameters.



In order to map dynamic parameters, you will need to view reports in the SAP Crystal Reports designer.

### To identify and map dynamic parameters

- Depending upon your operating system, browse to Program Files\Saleslogix or Program Files (x86)\Saleslogix and double-click the **SLXReportingAssistant.exe**.
- Log on to the **Reporting Assistant** using your user ID and password, and database alias.



Reports must be processed before dynamic parameters can be mapped. This may take several minutes.

- To narrow the list of reports, do one of the following:
  - Click the **Ready** filter and select **True** to narrow the list of reports to the reports that have been processed and are ready to be viewed or edited.
  - Click the **Has Dynamic Parameters** filter and select **True** to narrow the list of reports to the reports with dynamic parameters.
- Click **Refresh Filter**.
- Review the list of reports. Reports that require attention are highlighted in the grid using one of the following colors.
  - Yellow - identifies reports with dynamic parameters.
  - Red - identifies reports with one or more errors to be corrected.
  - Green - identifies reports with dynamic parameters that have been mapped or are valid.
- Select a report from the **Reports** list.
- Click the **Prompt Parameters** tab.
- Review the list of parameters. Parameters that require attention are highlighted in yellow. Parameters that have already been mapped are highlighted in green.
- To narrow the list of parameters, select one or both of the filter buttons:
  - Show Dynamic Only** - lists only dynamic parameters
  - Show In Use Only** - lists only parameters that are being used
- Select a parameter in the grid and click the **Edit Dynamic Parameter** button.

11. Click **View Report in SAP Crystal Reports**.
  - a. If the Field Explorer is not open, on the **View** menu, click **Field Explorer**.
  - b. In the **Field Explorer**, expand **Parameter Fields**, and double-click the parameter you want to view.
  - c. In the **Edit Parameter** dialog box, note if the **Value** or **Description** contains information. Some parameters may have both a Value and a Description.
  - d. Hover your mouse over the Value or Description and note the table and field identified in the tooltip.
12. Do one of the following:
  - To add a parameter click the Add button.
  - To edit a parameter, select the parameter in the Data Source grid and click the ellipsis button
13. Return to the Reporting Assistant.
14. If the parameter had a Value defined in the Crystal Report designer, then map the Value to the correct table and field.
  - a. Select the parameter and click the **Data Source** button. The Select Data Source dialog box opens.
  - b. Under **Data Source Type** select **Value**.
  - c. Click the **Suggestions** drop-down arrow and select the item that matches the tooltip in the Crystal Report designer. If the Suggestions list is empty or does not match the table and field in the Crystal Reports designer, then use the **Table** and **Field** boxes to select the appropriate table and field.
  - d. Click **OK**.
15. If the parameter has a Description defined in the Crystal Report designer, then map the Description to the correct table and field.
  - a. Select the parameter and click the **Data Source** button. The Select Data Source dialog box opens.
  - b. Under **Data Source Type** select **Description**.
  - c. Click the **Suggestions** drop-down arrow and select the item that matches the tooltip in the Crystal Report designer. If the Suggestions list is empty or does not match the table and field in the Crystal Reports designer, then use the **Table** and **Field** boxes to select the appropriate table and field.
  - d. Click **OK**.
16. Click the Launch report button to preview the report.
17. Click **OK**.
18. To fix or remove invalid metadata, click **Validate Meta Data**.
19. Repeat steps 9-14 for each of the parameters listed on the Prompt Parameters tab that are not highlighted in green. If mapped parameters are not highlighted in green click the Refresh Display button.
20. If desired, preview the report to see how it will appear in the Windows or Web Client
21. When finished updating one or more reports, click **Save Changes**.
22. When finished updating one or more reports, click the **Release** button. Click **Yes** for each report you want to re-release to anyone who previously has access to the report.