



Applying SNC Update 04 for Version 8.2

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Introduction



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 04 for version 8.2. SNC Updates provide modifications to pieces such as the Provider, SLX Server, 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:

- Infor CRM version 8.2



Do not install SNC Update 04 for 8.2 on any other version.



SNC Updates are cumulative. You do not need to install earlier SNC updates before installing SNC Update 04.

Additional considerations

- Environments with Remote Clients running Infor CRM Xbar for Microsoft Outlook or Outlook sync must install SNC, Core, and Model Update 02 or later for version 8.2 on the Web Server in order to copy necessary files from the Web Server to each Remote Client.
- Infor CRM Back Office Extension (ICBOE) requires the following updates:
 - SNC Update 02 or later for version 8.2
 - Core Update 03 or later for version 8.2
 - Model Update 03 or later for version 8.2

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/infortreme.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1

Changes in this Update

1

This chapter lists all of the changes to Infor CRM since version 8.2.

Features added in this update

SNC Update 04 for Infor CRM 8.2 contains features released in previous updates.

- There are no new features for this update.

Features added in previous updates

- SNC Update 02 for Infor CRM version 8.2
 - 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.



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 04 for Infor CRM version 8.2 addresses the following issues:

Defect	Description
INFORCRM-11313	The scrollbar is not visible for the last record in a tab list.
INFORCRM-11315	When adding a user to a user's calendar in the Administrator, an EoleException error occurs.
INFORCRM-11698	In the Windows Client, the Replace Data Search and Replace option causes the error, "Error replacing value: No value given for one or more required parameters" when attempting to replace data in the Address1 field.
INFORCRM-12362	The Windows Client Query Builder conditions return incorrect results.
INFORCRM-12707	When performing an Advanced SpeedSearch based upon a keyword, filtering by account ignores the keyword criteria.

Issues fixed in previous updates

SNC Updates are cumulative, so SNC Update 04 for Infor CRM 8.2 contains fixes released in previous updates.

SNC Update 03 for Infor CRM version 8.2 addresses the following issues:

Defect	Description
INFORCRM-9706	In a Russian environment, the auto-populate feature of a combo box translates certain Russian characters incorrectly and returns the wrong items for the lookup.
INFORCRM-9749	Using the IN Condition as the first condition in a Query Builder query causes all other condition values to be corrupted when saved.
INFORCRM-9750	Cyrillic characters in the Owner field are corrupted when exporting records to Microsoft Excel.
INFORCRM-9963	Team Names that contain Cyrillic characters are corrupted in the Share Team view.
INFORCRM-9964	Cyrillic characters in the User Template name are corrupted.
INFORCRM-9965	An error occurs when exporting a group to Excel if the Group name contains Cyrillic characters.
INFORCRM-10110	In a Russian Windows client, the context menu for editing the description of a product contains corrupted characters.
INFORCRM-10111	In a Russian Windows Client, the tooltips contain corrupted characters.
INFORCRM-10112	In the Architect, if a plugin is released to a team with a name that contains Cyrillic characters the team name on the Release Plugin details view will contain corrupted characters.
INFORCRM-10115	ActivityAttendee and HistoryAttendee records are not synchronized between host and remote databases.
INFORCRM-10152	In the Architect, project names that contain extended character sets display corrupted characters.
INFORCRM-10222	In a Russian Windows client, when importing leads, the "Show all Fields" label and "Unmatch" button text are truncated.
INFORCRM-10223	In a Russian Windows client, the Opportunity Add Product dialog box contains truncated buttons and labels.
INFORCRM-10226	In a Russian Windows client, when creating a new contact/account, the Look for Matching Records button text is larger than the button.
INFORCRM-10233	In a Russian Windows client the Share Group dialog box contains corrupted and overlapping characters.
INFORCRM-10234	In a Russian Windows client the Account detail view Notes/History tab contains truncated labels.
INFORCRM-10376	In a Russian Architect the Reopen Project list contains corrupted characters.
INFORCRM-10393	If the Display Name of a field is changed to Cyrillic it will initially display correctly in Administrator. However when the field is then added to a Mail Merge Template the Cyrillic text is corrupted.
INFORCRM-10442	In a Russian Windows client the Query Builder does not correctly display Russian characters in the title or the group name.
INFORCRM-10443	In a Russian Windows client the Contact lookup contains corrupted characters.

SNC Update 02 for Infor CRM version 8.2 addresses the following issues:

Defect	Description
INFORCRM-6573	An access violation in the Crystal Reports crdb_ado.dll library may cause a crash in the Job Service or the SlxClient portal.
INFORCRM-8832	The Crystal Reports API is not exposed.
INFORCRM-8845	Web Client Address Labels do not print in the correct format.
INFORCRM-8862	Cutting a remote database causes problems with dependent views.
INFORCRM-8863	If duplicate view names were retrieved when cutting a remote database an error occurs when the views are applied to the remote database.
INFORCRM-8865	The Admin.exe should create a log file when cutting a remote database.
INFORCRM-8867	The database creation process should identify views with dependencies.
INFORCRM-8876	An error occurs if a sales process includes a to-do activity with an ampersand in the Regarding field.
INFORCRM-8955	Crystal Reports performance slowed between versions 7.5.4 and 8.1.
INFORCRM-9598	MemCache is required for Network Remote to successfully connect to Sdata portal.
INFORCRM-9854	Strings with extended characters cannot be found in Advanced lookup.

SNC Update 01 for Infor CRM version 8.2 addresses the following issues:

Defect	Description
INFORCRM-3457	City and state values are not displaying on the Contact and Account Whats New tabs.
INFORCRM-3458	In a localized environment, corrupted characters appear when customizing a pick list with umlauts.
INFORCRM-3459	When using SSL and Sync Automation the following error occurs "Failed to send file. The Action must be retried".
INFORCRM-3460	After executing a script, AgentRunner may get caught in an endless iterative loop using increasing amounts of system resources .
INFORCRM-3461	Activity attachments are not saved under Attachment Tab of the relevant contact detail view.
INFORCRM-3462	In the Administrator, when creating a new table on a Unicode database the ID is set to char(12) instead of nchar(12).
INFORCRM-3647	Updated triggers are not synchronized to remote databases.
INFORCRM-3673	Synchronization Service should be named Saleslogix Synchronization Service.
INFORCRM-3794	Crystal reports queries fail, returning a blank page, when the same report is run more than once.
INFORCRM-4063	The slxotl32.dll 64-bit will not register on a system with a 64-bit version of Microsoft Office.

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
Infor_CRM_v820_SNC_Update_04.zip	Infor_CRM_v820_SNC_Update_04.exe	
	Infor CRM v8.2.0 Update 04.sxb	
	Infor CRM Xbar Setup.exe	
	Installing Infor CRM Xbar for Microsoft Outlook.pdf	
Infor_CRM_v820_SNC_Update_04.exe	Admin.exe	8.2.0.1409
	AgentRunner.exe	8.2.0.1293
	ApplicationArchitect.chm	
	Architect.exe	8.2.0.1409
	DeveloperTips.chm	
	Getting Started with Infor CRM Windows Client.pdf	
	Infor CRM Quick Reference for the Web User.pdf	
	Integrations.chm	
	PortalExplorer.chm	
	SalesLogix.exe	8.2.0.1433
	Saleslogix.Reporting.API.dll	8.2.0.1259
	SLXControls.ocx	8.2.0.1433
	SLXLoggingServer.exe	8.2.0.1293
	SLXMMEngine.dll	8.2.0.1409
	SLXMGUI.dll	8.2.0.1409
	SLXQuickForms.chm	
	SShttp.dll	8.2.0.1293
	SyncClient.exe	8.2.0.1293

File Name	File Contents	File Version
Infor CRM v8.2.0 Update 04.sxb	Create database objects: <ul style="list-style-type: none"> ■ Trigger : MSSQL : GLOBALCHANGETRACKING_IDENTITY_CHK ■ Trigger : MSSQL : GLOBALCHANGETRACKING_IDENTITY_CHK_A ■ Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS_A ■ Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS ■ Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGES_A ■ Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGES ■ View : MSSQL : AttendeeRemoteSync ■ View : Oracle : AttendeeRemoteSync 	
	Changes to Forms: <ul style="list-style-type: none"> ■ Account : Notes-History ■ Contact : Notes-History ■ Lead : Notes-History ■ Opportunity : Notes-History ■ System : Add New Contact Account ■ System : Add Opportunity Product ■ System : Import Leads ■ System : Import Leads Options ■ System : Insert Opportunity ■ System : Potential Matches 	
	Execute SQL: UPDATE SYSDBA.SYSTEMINFO SET ISSUEMATCH = 'T' WHERE ISSUEMATCH IS NULL	
	Insert Plugin (Dashboard Widget System Group List)	

File Name	File Contents	File Version
	Insert Plugin (Scripts, VBscript System: SP_SalesProcessFunctions)	
	Insert Plugin (Reports, Labels: A4 Avery L7162 - Address)	

Chapter 2

Applying the Update

2

Apply this Update to all computers where the following components have already been installed:

- Administrative Tools and Servers
- Remote Office
- Windows Client
- Remote Client
- Offline Web Client



Install the Infor CRM v8.2.0 Update 04.sxb bundle using the Administrator.

Before installing the Infor CRM v8.2.0 Update 04.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 Infor CRM applications on the computer to which you are applying the Update.
2. Extract the contents of the **Infor_CRM_v820_SNC_Update_04.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v820_SNC_Update_04.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**.
7. Restart the Infor CRM (Saleslogix) services stopped in step 2. Restart the Saleslogix System Service last.

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 v8.2.0 Update 04 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 v8.2.0 Update 04.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**.

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

The Infor CRM Xbar Setup.exe is included in the Infor_CRM_v820_SNC_Update_04.zip. Infor CRM Windows Client users must manually launch the install. You must share this install file to make it available to users.

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 following 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.

