



# Applying Web Model Update 03 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 Web Model Update 03 for version 8.2.

## Prerequisites

The following software must be installed before installing this update:

- Infor CRM version 8.2
- 8.2 SNC Update 03
- 8.2 Web Core Update 03



Do not install Web Model Update 03 for 8.2 on any other version.



Web Model Updates are cumulative. You do not need to install earlier Web Model updates before installing Web Model Update 03.

## Additional considerations

- **Internet Explorer 10 only:** A supported version of Microsoft .NET Framework must be installed on the Web Host server in order to support Internet Explorer 10.
  - Microsoft .NET Framework v4.5.1 (recommended) - This version of .NET Framework will run concurrently with versions 3.5 and earlier, but will replace .NET Framework versions 4.0 and 4.5. Microsoft .NET Framework 4.5.1 can be downloaded from the Microsoft site: <http://www.microsoft.com/en-us/download/details.aspx?id=41641>



This link was valid at the time this document was distributed. If this link is no longer valid, search the <http://www.microsoft.com> site for ".NET Framework 4.5.1" for the correct location and select either the Offline or Web Installer version.

- Microsoft .NET Framework v3.5.1 - If your environment does not support Microsoft .NET Framework v4.5.1, then you must apply two Microsoft hot fixes to support Internet Explorer 10. These hot fixes can be downloaded from:

<http://support.microsoft.com/kb/2600100>

<http://support.microsoft.com/kb/2608565>



These links were valid at the time this document was distributed. If these links are no longer valid, search the <http://www.microsoft.com> site for "KB2600100" and "KB2608565"

- Environments with Remote Clients running Infor CRM Xbar for Microsoft Outlook or Outlook sync must install SNC, Core, and Model Update 03 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 03 for version 8.2
  - Core Update 03 for version 8.2
  - Model Update 03 for version 8.2

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

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](mailto:documentation@infor.com).

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# 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

Web Model Updates are cumulative, so Web Model Update 03 for Infor CRM 8.2 contains features released in previous updates.

Web Model Update 02 for Infor CRM version 8.2 includes the following new features:

- Outlook sync and the Outlook Integration features that were previously included with Desktop Integration have been moved to Infor CRM Xbar for Microsoft Outlook. This requires Xbar version 1.3.1 or later.
- Office Integration is now installed from the Install Office Integration button on the Options, General tab.

### Features added in previous updates

Web Model Update 01 for Infor CRM version 8.2 includes the following new features:

#### Web Client

- Ability to update multiple fields for multiple records, including the ability to update the account manager or account owner after an import
- Ability to delete multiple records
- Import History Detail view has a link to the import ad hoc group that contains the records that were successfully imported
- Features for Administrators and those with appropriate role access:
  - Filter Manager is now Entity Manager which enables the management of entity filters, metrics, and fields
  - Ability to add fields
  - Area/Category/Issue management including ability to manage auto assignment
- The Language list now includes English (UK)

#### Application Architect

- To support meta data discovery, the Data Type field was changed from text to a picklist



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

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



All defect descriptions apply to the Infor CRM Web Client unless the defect description specifically states otherwise.

Defect	Description
INFORCRM-5596	Address.Address.entitytype.xml file needs to be added to the 8.2 Model update documents.
INFORCRM-10156	The next_url query string parameter used as the location for a redirect response is now being transferred between the pages using session state to address a potential security risk.
INFORCRM-10688	Export to File does not apply GMT/UTC formatting to Date/Time fields.

## Issues fixed in previous updates

Web Model Updates are cumulative, so Web Model Update 03 for Infor CRM 8.2 contains fixes released in previous updates.

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



All defect descriptions apply to the Infor CRM Web Client unless the defect description specifically states otherwise.

Defect	Description
INFORCRM-6572	An OutOfMemoryException may occur when large reports are run frequently in either the Job Service or the SlxClient portal.
INFORCRM-8807	The Office Integration install must detect if a previous version of Desktop Integration is installed and then uninstall it.
INFORCRM-8820	Unable to sort Lookup columns after applying 8.2. Update 01.
INFORCRM-8826	The Web Client Office Integration is now separate from Outlook Integration.
INFORCRM-8828	Remove the Install Desktop integration from sign in page and General options screen. Replace the options in the General tab with Office Integration and XBar install buttons.
INFORCRM-8840	Users added to a custom Library role may not able to see additional Library controls in the Web Client .
INFORCRM-8857	In a Windows Authentication environment, the Ticket Detail view Email Ticket button is unresponsive.
INFORCRM-8859	In a Windows Authentication environment, the Ticket Detail view Date/Time stamp does not work.
INFORCRM-8877	The Contract Quantity field does not allow decimals, which are allowed in the Windows Client.



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



All defect descriptions apply to the Infor CRM Web Client unless the defect description specifically states otherwise.

Defect	Description
INFORCRM-1328	The progress bar in the menu bar has been restyled.
INFORCRM-3407	The Address control on the Address tab has been updated to apply new styling to checkboxes use the new style and to fix width and height issues.
INFORCRM-3426	Clicking on Outlook Sync Options then clicking OK to close causes Microsoft Outlook to stop functioning.
INFORCRM-3433	The time zone is inconsistent with time zone in the time zone setting dialog.
INFORCRM-3434	The Web Client time zone does not reflect setting on computer.
INFORCRM-3448	Inconsistent show/hide behavior in context menu on an iPad.
INFORCRM-3456	When signing in to the Web Client on a local machine with a timezone different than the Web Host server the error "Unable to get timezone from client, using server timezone." occurs.
INFORCRM-3465	The 'Create Opportunity after Lead conversion or merge' check box on the Convert Lead dialog box is not styled correctly.
INFORCRM-3468	The Import History title should be right aligned.
INFORCRM-3482	The text on the folder in the Library is white with a light grey background making it very hard to read.
INFORCRM-3484	In an Internet Explorer 10 browser, when scheduling an activity from a step in a sales process the General tab may not display correctly or at all.
INFORCRM-3486	In a localized environment, if the sales order status is Closed, most of the boxes in the detail view should not be available to be edited.
INFORCRM-3493	In an Internet Explorer 10 browser drop-down list arrows display with a gray background.
INFORCRM-3513	In a localized environment, the Edit Global Join fields Visibility and Cascade Type open as blank when using Internet Explorer or Chrome.
INFORCRM-3592	An error occurs when moving between records in the Sync History detail view.
INFORCRM-3625	Add the ability to update multiple fields and multiple records as part of a bulk update.
INFORCRM-3658	In a Chinese (Traditional) environment, some labels are not translated.
INFORCRM-3659	In a Chinese environment, newly created widgets field names are not translated.
INFORCRM-3664	In a Chinese (Traditional) environment the Welcome Page is not translated.
INFORCRM-3694	In a Chinese environment, labels on the Associate a Contact view are not aligned correctly.
INFORCRM-3700	In a Chinese (Traditional) environment, the Follow Up label on the Complete an Activity view is not aligned correctly.
INFORCRM-3707	In a Chinese (Traditional) environment, the boxes on the Opportunity Sales Process snapshot view are not aligned correctly.
INFORCRM-3724	Change the Filter Manager name to Entity Manager.
INFORCRM-3731	Add the ability to filter picklist items by another picklist.
INFORCRM-3738	Add Area/Category/Issue management to the Web Client.

Defect	Description
INFORCRM-3760	Replace update Multiple Opportunities, update Leads, and Delete Leads with the new bulk update feature.
INFORCRM-3773	Address.Entitytype is now populated upon the creation of a new address.
INFORCRM-3774	Add the ability to allow HTML tags on a page by page basis.
INFORCRM-3790	On the Sales Order detail view, the Billing Address and Shipping Address labels are not aligned correctly.
INFORCRM-3796	On the Import History detail view, add a link to the import ad-hoc group created after performing an import.
INFORCRM-3813	In a localized environment, when using Outlook sync ,the contact, account, lead, phone number, and company should be localized in the body of the Microsoft Outlook appointment.
INFORCRM-3847	Account and contact owner is set to Everyone even though the Import owner is set to another user.
INFORCRM-3878	On the Campaign detail view Targets tab manually selected records are not cleared after selecting Clear All.
INFORCRM-3934	An error occurs when filtering Import History list view by Create Date.
INFORCRM-3967	Add a Quick Form solution to allow entry of XML in form fields without receiving validation errors.
INFORCRM-4018	Add an Entity filter to the Import History list view.
INFORCRM-4062	The 64-bit version of the slxotl32.dll will not register on a system with a 64-bit version of Microsoft Office.
INFORCRM-4109	The Modules section of the web.config does not register the TimeZoneModule. for IIS 7 (integrated).
INFORCRM-4125	The Web Client uses the Web Host server time zone rather than local workstation time zone.
INFORCRM-4137	Add English (UK) to the language list on the sign on page and User Preferences tab in Options.
INFORCRM-4157	When updating multiple opportunities, updating Add to Forecast causes the error "There was an unknown error in response to an HTTP request".
INFORCRM-4218	Integration records should display the version number for troubleshooting purposes.
INFORCRM-4327	Browser language overrides the Opportunity Closed Won Lost Actual Amount currency.
INFORCRM-4688	The Personal Activity icon in the Web Client help does not match the icon on the Calendar or Activities list view.

## 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_Web_Model_Update_03.zip	ICRM v8.2.0 VFS Web Model Update 03.zip	
ICRM v8.2.0 VFS Web Model Update 03.zip	Account.ACCOUNT.entity.xml	
	Account.User.03d231a10e13421e90726e2be6b19890.relationship.xml	
	Account.User.f094a99e951746ffa3e12b55fc0197f2.relationship.xml	
	Account.User.fa9b2ef253bb4a52be2b70e36b403672.relationship.xml	
	ACI_Extended_Details.htm	
	ACIDetails.ascx	
	ACIDetails.ascx.de.resx	
	ACIDetails.ascx.fr.resx	
	ACIDetails.ascx.it.resx	
	ACIDetails.ascx.resx	
	ACIDetails.ascx.ru.resx	
	ACIDetails.smartpart.xml	
	ACIDetails.smartpart.xml.de.resx	
	ACIDetails.smartpart.xml.fr.resx	
	ACIDetails.smartpart.xml.it.resx	
	ACIDetails.smartpart.xml.resx	
	ACIDetails.smartpart.xml.ru.resx	
	AciExtendedDetailsView.main.quickform.xml	
	AciExtendedDetailsView.main.quickform.xml.resx	
	AciExtendedDetailsView.smartpart.xml	
	AciExtendedDetailsView.smartpart.xml.de.resx	
	AciExtendedDetailsView.smartpart.xml.fr.resx	
	AciExtendedDetailsView.smartpart.xml.it.resx	
	AciExtendedDetailsView.smartpart.xml.resx	
	AciExtendedDetailsView.smartpart.xml.ru.resx	
	Activity.ACTIVITY.entity.xml	
	addattachment.htm	
	AddContactId.method.xml	
	AddEditAddress.ascx	
	AddEditAddress.ascx.cs	
	AddEditContactAssociation.ascx	
	AddEditPickListItem.ascx	

File Name	File Contents	File Version
	AddEditPickListItem.ascx.cs	
	AddEditPickListItem.ascx.fr.resx	
	AddEditPickListItem.ascx.it.resx	
	AddEditPickListItem.ascx.resx	
	AddEditPickListItem.ascx.ru.resx	
	Adding_an_Ad_Hoc_Group.htm	
	Adding_Editing_Copying_Area,_Category_Issue_Values.htm	
	Adding_Editing_Fields.htm	
	Adding_Editing_Filters.htm	
	Adding_Editing_Metrics.htm	
	Address.ADDRESS.entity.xml	
	AddTicketActivityCommentsTimeStamp.method.xml	
	AddToTeam.ascx.cs	
	Alias.xml	
	appSettings.config	
	Area_Category_Issue_List_View.htm	
	AreaCategoryIssue.AREACATEGORYISSUE.entity.xml	
	AreaCategoryIssue.page.xml	
	AreaCategoryIssue.page.xml.de.resx	
	AreaCategoryIssue.page.xml.fr.resx	
	AreaCategoryIssue.page.xml.it.resx	
	AreaCategoryIssue.page.xml.resx	
	AreaCategoryIssue.page.xml.ru.resx	
	bars_16.gif	
	base.master	
	base.master.de.resx	
	base.master.fr.resx	
	base.master.it.resx	
	base.master.resx	
	base.master.ru.resx	
	bulkupdate.htm	
	bundleData.xml	
	Campaign.CAMPAIGN.entity.xml	
	CampaignTargets_ClientScript.js	
	Category.filter.xml	
	ChangeEntityId.method.xml	
	changing_the_lead_owner.htm	
	CleanUpErpPricingLines.method.xml	
	CommonTasksTasklet.ascx.cs	
	CommonTasksTasklet.ascx.resx	

File Name	File Contents	File Version
	Complete_an_Activity.htm	
	Config_Integrations_Sync_Service.htm	
	Configuring_Outlook_Sync.htm	
	Configuring_Outlook_Sync_Integration.htm	
	Contact.CONTACT.entity.xml	
	Contact.Owner.ba6e89fa60c14b958a0c44b25dfe0a06.relationship.xml	
	Contact.User.8bab3e09b2564170a2901964dc7e268d.relationship.xml	
	Contact.User.a5caa45b6e464fde9fc10c8c5487c9a6.relationship.xml	
	Contact.User.db064fd5fb264b368723e0862a58320c.relationship.xml	
	contextACI.contextmenu.xml	
	contextACI.contextmenu.xml.de.resx	
	contextACI.contextmenu.xml.fr.resx	
	contextACI.contextmenu.xml.it.resx	
	contextACI.contextmenu.xml.resx	
	contextACI.contextmenu.xml.ru.resx	
	Contract.CONTRACT.entity.xml	
	ContractDetail.main.quickform.xml	
	ContractDetail.main.quickform.xml.de.resx	
	ContractDetail.main.quickform.xml.fr.resx	
	ContractDetail.main.quickform.xml.it.resx	
	ContractDetail.main.quickform.xml.resx	
	ContractDetail.main.quickform.xml.ru.resx	
	CreateDate.filter.xml	
	Customer.filter.xml	
	dashboard.master	
	dashboard.master.resx	
	DeDupJob.DEDUPJOB.entity.xml	
	Default-Class-Saleslogix.Class.codetemplate.xml	
	Default-SData-Saleslogix.sdata.codetemplate.xml	
	Defect.DEFECT.entity.xml	
	Defect.filter.xml	
	Defect.Owner.2163b2defc5d4b3a99f665030272e51c.relationship.xml	
	Defect.Owner.ddaeca9ab2244bceaca87433a2dfcdb4.relationship.xml	
	Defect.Owner.f66b2b0baeb147c0a7597d5b5cd13825.relationship.xml	
	Defect.Owner.f6409527027e450283b54baba0d85733.relationship.xml	
	DefectActivityItem.DEFECTACTIVITYITEM.entity.xml	
	Deleting_Multiple_Records.htm	
	desktopintegration.htm	
	desktopmanagertroubleshooting.htm	
	Dialog.master	
	dragdrop.htm	

File Name	File Contents	File Version
	Editing_An_Opportunity.htm	
	Editing_Leads.htm	
	EditSalesOrderItem.main.quickform.xml	
	EditSalesOrderItem.main.quickform.xml.de.resx	
	EditSalesOrderItem.main.quickform.xml.fr.resx	
	EditSalesOrderItem.main.quickform.xml.it.resx	
	EditSalesOrderItem.main.quickform.xml.resx	
	EditSalesOrderItem.main.quickform.xml.ru.resx	
	EditSalesOrderItem.OnFormLoad.method.xml	
	emailloghistory.htm	
	emailtroubleshooting.htm	
	EntityManager.page.xml	
	EntityManager.page.xml.de.resx	
	EntityManager.page.xml.fr.resx	
	EntityManager.page.xml.it.resx	
	EntityManager.page.xml.resx	
	EntityManager.page.xml.ru.resx	
	EntityName.filter.xml	
	ExecuteSyncAll.method.xml	
	FrontMatter.htm	
	gears_init.js	
	GeneralSearchOptionsPage.ascx	
	GeneralSearchOptionsPage.ascx.resx	
	GetAddManagerWithMemberOption.method.xml	
	GetDefectActivityRates.method.xml	
	GetImportMappings.method.xml	
	GetMailMergeTemplates.method.xml	
	GetSecurityProfileByName.method.xml	
	GetSyncCycleInterval.method.xml	
	GetTicketActivityRates.method.xml	
	GetTicketAreaOwners.method.xml	
	Getting Started with Infor CRM Web Client.pdf	
	GlobalJoinManager.js	
	GroupLayout.de.resx	
	GroupLayout.fr.resx	
	GroupLayout.it.resx	
	GroupLayout.resx	
	GroupLayout.ru.resx	
	groupshortcutmenu.htm	
	History.HISTORY.entity.xml	

File Name	File Contents	File Version
	ImportHistory.IMPORTHISTORY.entity.xml	
	ImportHistoryDetail.ascx	
	ImportHistoryDetail.ascx.cs	
	ImportHistoryDetail.ascx.resx	
	Importing_Records.htm	
	Infor CRM Quick Reference for the Web User.pdf	
	InsertACI.page.xml	
	InsertACI.page.xml.resx	
	InsertContact.ascx	
	InsertContract.main.quickform.xml	
	InsertContract.main.quickform.xml.de.resx	
	InsertContract.main.quickform.xml.fr.resx	
	InsertContract.main.quickform.xml.it.resx	
	InsertContract.main.quickform.xml.resx	
	InsertContract.main.quickform.xml.ru.resx	
	installing_xbar.htm	
	Integration.INTEGRATION.entity.xml	
	IntegrationDetail.main.quickform.xml	
	IntegrationDetail.main.quickform.xml.de.resx	
	IntegrationDetail.main.quickform.xml.fr.resx	
	IntegrationDetail.main.quickform.xml.it.resx	
	IntegrationDetail.main.quickform.xml.resx	
	IntegrationDetail.main.quickform.xml.ru.resx	
	IntegrationLinks.main.quickform.xml	
	IntegrationLinks.main.quickform.xml.de.resx	
	IntegrationLinks.main.quickform.xml.fr.resx	
	IntegrationLinks.main.quickform.xml.it.resx	
	IntegrationLinks.main.quickform.xml.resx	
	IntegrationLinks.main.quickform.xml.ru.resx	
	IntegrationResource.INTEGRATIONRESOURCE.entity.xml	
	IsAutoPunchInEnabled.method.xml	
	IsContractIntegrationEnabled.method.xml	
	IsDisplayActivityOnPunchOut.method.xml	
	IsDisplayServiceInfoView.method.xml	
	IsImportEnabledForEntity.method.xml	
	IsMultiCurrencyEnabled.method.xml	
	Issue.filter.xml	
	IsValidName.method.xml	
	IsValidPassword.method.xml	
	JobsProgressDialog.htm	
	LanguageList.xml	

File Name	File Contents	File Version
	layout.css	
	Lead.LEAD.entity.xml	
	Lead.Owner.2b1e4554b4e0458188b33c040d1b45a1.relationship.xml	
	Lead.User.de2b58942ab045c089158991297a9865.relationship.xml	
	LeadAddress.LEAD_ADDRESS.entity.xml	
	leadimporthistorydetailview.htm	
	LeadSearchAndConvert.ascx	
	LeadSearchAndConvert.ascx.cs	
	LeadSource.LEADSOURCE.entity.xml	
	litreqadd1.htm	
	litreqfulfillcompletereject.htm	
	LiveGroupViewer.smartpart.xml	
	LiveGroupViewer.smartpart.xml.de.resx	
	LiveGroupViewer.smartpart.xml.fr.resx	
	LiveGroupViewer.smartpart.xml.it.resx	
	LiveGroupViewer.smartpart.xml.resx	
	LiveGroupViewer.smartpart.xml.ru.resx	
	llmUpdateLeads.contextmenu.xml	
	llmUpdateLeads.contextmenu.xml.de.resx	
	llmUpdateLeads.contextmenu.xml.fr.resx	
	llmUpdateLeads.contextmenu.xml.it.resx	
	llmUpdateLeads.contextmenu.xml.resx	
	llmUpdateLeads.contextmenu.xml.ru.resx	
	log4net.config	
	Login.aspx	
	Login.master	
	mailmergetroubleshooting.htm	
	Managing_Items_in_a_Pick_List.htm	
	manifest.xml	
	ManualMergeLeadwithLead.method.xml	
	menuItemLookupAreaCategoryIssue.contextmenu.xml	
	menuItemLookupAreaCategoryIssue.contextmenu.xml.de.resx	
	menuItemLookupAreaCategoryIssue.contextmenu.xml.fr.resx	
	menuItemLookupAreaCategoryIssue.contextmenu.xml.it.resx	
	menuItemLookupAreaCategoryIssue.contextmenu.xml.resx	
	menuItemLookupAreaCategoryIssue.contextmenu.xml.ru.resx	
	menuItemNewAreaCategoryIssue.contextmenu.xml	
	menuItemNewAreaCategoryIssue.contextmenu.xml.de.resx	
	menuItemNewAreaCategoryIssue.contextmenu.xml.fr.resx	
	menuItemNewAreaCategoryIssue.contextmenu.xml.it.resx	



File Name	File Contents	File Version
	menuItemNewAreaCategoryIssue.contextmenu.xml.resx	
	menuItemNewAreaCategoryIssue.contextmenu.xml.ru.resx	
	MergeLead.method.xml	
	navAreaCategoryIssue.navitem.xml	
	navAreaCategoryIssue.navitem.xml.de.resx	
	navAreaCategoryIssue.navitem.xml.fr.resx	
	navAreaCategoryIssue.navitem.xml.it.resx	
	navAreaCategoryIssue.navitem.xml.resx	
	navAreaCategoryIssue.navitem.xml.ru.resx	
	navEntity.navitem.xml	
	navEntity.navitem.xml.de.resx	
	navEntity.navitem.xml.fr.resx	
	navEntity.navitem.xml.it.resx	
	navEntity.navitem.xml.resx	
	navEntity.navitem.xml.ru.resx	
	new_aci.menu.xml	
	new_aci.menu.xml.de.resx	
	new_aci.menu.xml.fr.resx	
	new_aci.menu.xml.it.resx	
	new_aci.menu.xml.resx	
	new_aci.menu.xml.ru.resx	
	OfficeIntegrationSetup.exe	8.20.1136.0
	olmUpdateMultipleOpps.contextmenu.xml	
	olmUpdateMultipleOpps.contextmenu.xml.de.resx	
	olmUpdateMultipleOpps.contextmenu.xml.fr.resx	
	olmUpdateMultipleOpps.contextmenu.xml.it.resx	
	olmUpdateMultipleOpps.contextmenu.xml.resx	
	olmUpdateMultipleOpps.contextmenu.xml.ru.resx	
	OnBeforeUpdate.method.xml	
	Opportunity.OPPORTUNITY.entity.xml	
	Opportunity.Owner.9be9544a1278435a9ce2330818ca6ef9.relationship.xml	
	Opportunity.User.779261975e7d41719d9ae3c0405c32bd.relationship.xml	
	Opportunity.User.a080ed44912c46d6beb5e480c3fbdd65.relationship.xml	
	Opportunity.User.df253243ba7c49509e6aee8c45bcd6fa.relationship.xml	
	OpportunityClosedLost.cmdCancel_OnClick.method.xml	
	OpportunityClosedLost.lueCompetitorLoss_OnChange.method.xml	
	OpportunityClosedLost.main.quickform.xml	
	OpportunityClosedLost.main.quickform.xml.de.resx	
	OpportunityClosedLost.main.quickform.xml.fr.resx	
	OpportunityClosedLost.main.quickform.xml.it.resx	
	OpportunityClosedLost.main.quickform.xml.resx	

File Name	File Contents	File Version
	OpportunityClosedLost.main.quickform.xml.ru.resx	
	OpportunityClosedWon.cmdCancel_OnClick.method.xml	
	OpportunityClosedWon.lueCompetitorReplaced_OnChange.method.xml	
	OpportunityClosedWon.main.quickform.xml	
	OpportunityClosedWon.main.quickform.xml.de.resx	
	OpportunityClosedWon.main.quickform.xml.fr.resx	
	OpportunityClosedWon.main.quickform.xml.it.resx	
	OpportunityClosedWon.main.quickform.xml.resx	
	OpportunityClosedWon.main.quickform.xml.ru.resx	
	OpportunityContact.OPPORTUNITY_CONTACT.entity.xml	
	OpportunitySalesProcess.ascx	
	OpportunitySalesProcess.ascx.cs	
	Outlook_Sync_Overview.htm	
	Owner.Account.d61c1c9189f44baa83d7cfc02e81572e.relationship.xml	
	Owner.SECCODE.entity.xml	
	Package.PACKAGES.entity.xml	
	personal.gif	
	PickListItems.ascx	
	PickListItems.ascx.de.resx	
	PickListItems.ascx.fr.resx	
	PickListItems.ascx.it.resx	
	PickListItems.ascx.resx	
	PickListItems.ascx.ru.resx	
	PickListItemView.PICKLISTITEMVIEW.entity.xml	
	PortalPageAspx.vm	
	prefsgen.htm	
	Product.PRODUCT.entity.xml	
	QFDataGrid.WebControlRenderingTemplate.vm	
	QFSLXLookup.WebControlRenderingTemplate.vm	
	ReadImportData.method.xml	
	reassignowner.htm	
	RemoveAccessToOthersCalendar.method.xml	
	RemoveContactUserAssociations.method.xml	
	RemoveFromDepartment.method.xml	
	RemoveFromTeam.method.xml	
	RemoveOthersAccessToCalendar.method.xml	
	Resolving_Records_Not_Imported.htm	
	Return.RMA.entity.xml	
	ReturnAddress.RMAADDRESS.entity.xml	
	ReturnReceivedProduct.RMARECEIVEDPRODUCT.entity.xml	

File Name	File Contents	File Version
	RoleActions.main.quickform.xml	
	RoleActions.main.quickform.xml.de.resx	
	RoleActions.main.quickform.xml.fr.resx	
	RoleActions.main.quickform.xml.it.resx	
	RoleActions.main.quickform.xml.resx	
	RoleActions.main.quickform.xml.ru.resx	
	RoleDetails.main.quickform.xml	
	RoleDetails.main.quickform.xml.de.resx	
	RoleDetails.main.quickform.xml.fr.resx	
	RoleDetails.main.quickform.xml.it.resx	
	RoleDetails.main.quickform.xml	
	RoleDetails.main.quickform.xml.ru.resx	
	RoleDetails.OnLoadRoleDetails.method.xml	
	RoleUsers.main.quickform.xml	
	RoleUsers.main.quickform.xml.de.resx	
	RoleUsers.main.quickform.xml.fr.resx	
	RoleUsers.main.quickform.xml.it.resx	
	RoleUsers.main.quickform.xml	
	RoleUsers.main.quickform.xml.ru.resx	
	Sage.Platform.Orm.Services.IDbSchemaCreationService.service.xml	
	Sage.Platform.Orm.Services.IDynamicEntitySDataConfigurationService.service.xml	
	Sage.SnippetLibrary.CSharp.@.1a2a450c-2d2e-4f15-b619-2ad176aae159.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.03ece52b-ed84-472f-acc0-1c9e6f421871.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.4bf06cb0-2f4f-42d9-b023-7b48ba67a5fc.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.5fc66ecc-305b-4b51-b311-59fa7479c5e0.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.50a29bf4-0a49-4cf6-9848-1b93209c6040.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.d44aa26d-ea57-49a7-a1c5-fc400d1ab404.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.d91d83f3-efe1-45c0-913c-d94ecbceef36.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.d938e19f-dde6-479b-851e-32a09546fe09.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.fc60756c-b223-4b69-9607-a4b7e91fd6b3.codesnippet.cs	
	sageStyles.css	
	Saleslogix Integrations - Client ID and Secret.htm	
	SalesOrder.SALESORDER.entity.xml	
	SalesOrderAddress.SALESORDERADDRESS.entity.xml	
	SalesOrderDetails.btnSaveSalesOrder_OnClick.method.xml	
	SalesOrderDetails.main.quickform.xml	
	SalesOrderDetails.main.quickform.xml.de.resx	
	SalesOrderDetails.main.quickform.xml.fr.resx	
	SalesOrderDetails.main.quickform.xml.it.resx	

File Name	File Contents	File Version
	SalesOrderDetails.main.quickform.xml.resx	
	SalesOrderDetails.main.quickform.xml.ru.resx	
	SalesOrderDetails.OnLoad1.method.xml	
	SalesOrderItem.SALESORDERITEMS.entity.xml	
	SalesOrderProducts.btnAddCustomProduct_OnClick.method.xml	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.de.resx	
	SalesOrderProducts.main.quickform.xml.fr.resx	
	SalesOrderProducts.main.quickform.xml.it.resx	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.main.quickform.xml.ru.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	
	ScheduleCompleteActivity.ascx.cs	
	ScheduleProcess.ascx.cs	
	SData_Detail_view.htm	
	SelectRole.main.quickform.xml	
	SelectRole.main.quickform.xml.de.resx	
	SelectRole.main.quickform.xml.fr.resx	
	SelectRole.main.quickform.xml.it.resx	
	SelectRole.main.quickform.xml.resx	
	SelectRole.main.quickform.xml.ru.resx	
	Service.js	
	SetAddManagerWithMemberOption.method.xml	
	SetLinkEnabledState.method.xml	
	SetUserIntegrationMapEnabledState.method.xml	
	slxoutlook.htm	
	slxtroubleshooting.htm	
	Supported_Features_Browser_Matrix.htm	
	SyncResult.page.xml	
	SyncResult.page.xml.de.resx	
	SyncResult.page.xml.fr.resx	
	SyncResult.page.xml.it.resx	
	SyncResult.page.xml.resx	
	SyncResult.page.xml.ru.resx	
	TargetResponse.TARGETRESPONSE.entity.xml	
	theme.css	
	Ticket.filter.xml	
	Ticket.page.xml	
	Ticket.page.xml.de.resx	
	Ticket.page.xml.fr.resx	

File Name	File Contents	File Version
	Ticket.page.xml.it.resx	
	Ticket.page.xml.resx	
	Ticket.page.xml.ru.resx	
	Ticket.TICKET.entity.xml	
	TicketActivitiesSubscription.js	
	TicketActivity.TICKETACTIVITY.entity.xml	
	TicketDetails.main.quickform.xml	
	TicketDetails.main.quickform.xml.de.resx	
	TicketDetails.main.quickform.xml.fr.resx	
	TicketDetails.main.quickform.xml.it.resx	
	TicketDetails.main.quickform.xml.resx	
	TicketDetails.main.quickform.xml.ru.resx	
	Toc.xml	
	Updating_Multiple_Opportunities.htm	
	UserCalendar.USERCALENDAR.entity.xml	
	UserCalendarFavorite.USERCALENDARFAVORITE.entity.xml	
	UserIntegrationMap.USERINTEGRATIONMAP.entity.xml	
	UserNotification.USERNOTIFICATION.entity.xml	
	UserRoles.main.quickform.xml	
	UserRoles.main.quickform.xml.de.resx	
	UserRoles.main.quickform.xml.fr.resx	
	UserRoles.main.quickform.xml.it.resx	
	UserRoles.main.quickform.xml.resx	
	UserRoles.main.quickform.xml.ru.resx	
	Using_the_Contact_List_View.htm	
	Using_the_Filter_Manager_View.htm	
	Using_the_Filter_Manager_View_Fields_Tab.htm	
	Using_the_Filter_Manager_View_Filters_Tab.htm	
	Using_the_Filter_Manager_View_Metrics_Tab.htm	
	Using_the_Lead_List_View.htm	
	Using_the_Opportunity_List_View.htm	
	web.config	
	What_s_New_In_This_Release.htm	
	WinAuthLoad.aspx.cs	
Office Integration Setup.exe	MailMerge.chm	
	SLXDocW.dll	8.2.0.1136
	SLXFaxW.dll	8.2.0.1136
	SLXFramer.ocx	8.2.0.1136
	SLXMMEngineW.dll	8.2.0.1136
	SLXMMGUIW.dll	8.2.0.1136
	SLXWinFaxW.dll	8.2.0.1136



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# Chapter 2

## Applying the Update

# 2

This Web Model Update affects the following portals:

- SData
- Web Client
- Customer Portal
- SDataCustomerPortal



Install the ICRM v8.2.0 VFS Web Model Update 03.zip bundle using the Application Architect, and then build and deploy your Web site(s).

## Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

### To install the bundles

1. Extract the contents of the **Infor\_CRM\_v820\_Web\_Model\_Update\_03.zip** file to a temporary folder.
2. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
3. Open the **Application Architect**.
4. On the **View** menu, click **Bundle Manager**.
5. Click **Install**.
6. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.2.0 VFS Web Model Update 03.zip**, and then click **Open**.
7. On the **Select Bundle** screen, click **Next**.



- If you have customized your Web Client files, you may receive a message that the bundle contains items that conflict with existing items in this project. See the Application Architect help file topic called 'Merging Changes During Bundle Installation' for instructions before continuing to install the bundle.

8. On the **Select Items** screen, ensure the **Portals** option is selected.
9. Click **Next**, and then click **Finish**.
10. If your installation includes ICBOE version 1.0.2, then repeat steps 3-9 to reapply the **Infor CRM VFS BOE 1.0.2.zip** bundle.

After building and deploying continue to "[Infor CRM Back Office Extension \(ICBOE\) installations](#)" to complete the steps required for ICBOE.

## Building and deploying the Web changes

To make your changes available, you must build and deploy the Web portal(s).

### To build and deploy

1. In the **Project Explorer**, click the project.
2. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**. All the files in the entire assembly for the current project are compiled. Status for the build is displayed in the Output Window at the bottom of the screen.
3. When the build is complete, on the **View** menu, click **Deployment Explorer**.
4. Expand **Deployments**.
5. Double-click the portal to deploy.
6. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.  
View the status of the deployment in the Output window.



- By default, the Web Client portal is set to deploy to the localhost, but you can change these settings to fit your environment.
  - Changes will not be visible to the Offline Web Client and/or Web remote Office until after the next Sync cycle.
7. Repeat steps 1-6 for each of the affected portals.

## Infor CRM Back Office Extension (ICBOE) installations

If your installation includes ICBOE version 1.0.2 you must perform the following steps after applying SNC, Core, and Model Update 03 for version 8.2 and installing the Infor CRM VFS BOE 1.0.2 bundle in "[Installing VFS bundles](#)"

- Update the version of **Sage.Saleslogix.HighLevelTypes.dll** currently on your system with the version provided in KB article 1657238.  
For the correct version of the file and steps to copy it to your system, download KB article 1657238 from the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

## Remotes running Infor CRM Xbar for Microsoft Outlook or Outlook sync

Remote environments running Infor CRM Xbar for Microsoft Outlook and Outlook sync require files to be copied from the Web Host to each remote environment.

This applies to:

- Remote Client

### To update remote environments

1. Apply SNC, Core, and Model Update 03 for version 8.2 to all environments.
2. On the Web Host, browse to `\\inetput\wwwroot\data\bin`.



3. Copy the following files to a shared location:
  - **Sage.Entity.Interfaces.dll**
  - **Sage.SalesLogix.Activity.Entities.dll**
  - **Sage.SalesLogix.ContractSync.Entities.dll**
  - **Sage.SalesLogix.Entities.dll**
  - **Sage.SalesLogix.Security.Entities.dll**
4. On each remote machine, close all open applications, and browse to **C:\ProgramData\SalesLogix\Sync\PortalDeployments\sdata\bin**.
5. Paste the files copied in step 3.
6. Restart your machine.



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# Appendix A

## Registering to receive knowledgebase e-mail updates

A

We recommend that you check the support portal web site periodically to download software, patches, and upgrades, and to access and print release notes and documentation. You must sign up to the ICBOE mailing list to receive e-mail notifications related to ICBOE products.

**To register to receive ICBOE knowledge base e-mail updates:**

1. Open a web browser.
2. Enter the URL for the Infor Xtreme Support portal log in screen:  
<http://www.inforxtreme.com/allogin/allogin.aspx>.
3. Specify the e-mail address and password for your Infor Xtreme user account.
4. Click **Sign In**.  
The Infor Xtreme Support Home Page is displayed.
5. Select **Knowledge Base > Latest News**.

