



Applying SNC Update 05 for Version 8.3

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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 05 for Infor CRM version 8.3. 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 Infor CRM software must be installed before installing this update:

- Infor CRM version 8.3



Do not install SNC Update 05 for Infor CRM 8.3 on any other Infor CRM version.



SNC Updates are cumulative. You do not need to install earlier SNC updates before installing SNC Update 05.

Additional considerations

- Infor CRM Back Office Extension (ICBOE) requires the following updates:
 - SNC Update 04 or later for Infor CRM version 8.3
 - Core Update 04 or later for Infor CRM version 8.3
 - Model Update 04 or later for Infor CRM version 8.3

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- Contour feature requires the following updates:
 - SNC Update 04 or later for Infor CRM version 8.3
 - Core Update 04 or later for Infor CRM version 8.3
 - Model Update 04 or later for Infor CRM version 8.3
 - If your installation includes the Proximity Search third-party product by Xtivia, and you will be converting to Infor's Contour feature, do the following before installing Infor CRM v8.3 Update 04 or later:



If you completed this task in 8.3 Update 04, you do not need to repeat it.

- Stop the Windows Task that was created as part of Proximity Search and delete the task. If the task is not stopped, it may continue to geocode during the upgrade, which may result in some inaccurate data. If the Windows task is still running after the upgrade, it will impede the Infor Job Manager from geocoding for Contour.

Contacting Infor

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

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 8.3.

Features added in this update

- No new features were added with this update.

New Features added in previous updates

SNC Update 05 for Infor CRM 8.3 contains features released in previous updates.

SNC Update 04 for Infor CRM version 8.3 includes the following new features:

- No new features were added with this update.

SNC Update 03 for Infor CRM version 8.3 includes the following new features:

- No new features were added with this update.

SNC Update 02 for Infor CRM version 8.3 includes the following new features:

- No new features were added with this update.

SNC Update 01 for Infor CRM version 8.3 includes the following new features:

Windows Client

- Improvements to Reporting performance.

Issues fixed in this update

SNC Update 05 for Infor CRM version 8.3 addresses the following issues:

Defect	Description
INFORCRM-11035	When scheduling a sales process e-mail step, the opportunity contacts are not listed.
INFORCRM-11720	In a localized environment with Cyrillic characters, Export to File contains corrupted characters.
INFORCRM-11722	In a localized environment, a team with Cyrillic characters displays corrupted characters in the Calendar view.
INFORCRM-11724	In a localized environment with Cyrillic characters, Calendar reports contain corrupted characters.
INFORCRM-11730	In a localized environment, user names with Cyrillic characters display corrupted characters in Calendar reports.
INFORCRM-11736	In a localized environment with Cyrillic characters, the Add to Team view contains corrupted characters.
INFORCRM-11738	In a localized environment with Cyrillic characters, the Remove from Team view contains corrupted characters.
INFORCRM-11740	In a localized environment with Cyrillic characters, the Select User/Team/Department view contains corrupted characters.
INFORCRM-12998	In a localized environment, when creating address labels for an account the account displays with question marks.

Issues fixed in previous updates

SNC Update 05 for Infor CRM 8.3 contains fixes released in previous updates.

SNC Update 04 for Infor CRM version 8.3 addresses the following issues:

Defect	Description
INFORCRM - 7162	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 - 11028	The Opportunity Details report displays the incorrect price.
INFORCRM - 11918	In a localized environment, new roles that contain Cyrillic characters are corrupted.
INFORCRM - 12015	Windows Client Script error displays when clearing and adding a Competitor in the Comp. Replaced field.
INFORCRM - 12174	In a Russian environment, Opportunity detail view labels overlap.
INFORCRM - 12190	In a Russian environment, the Matching Leads dialog box contains overlapping and truncated elements.
INFORCRM - 12192	In a Russian environment, the Insert Note dialog box contains overlapping labels.
INFORCRM - 12198	In a Russian environment, the Account detail view contains overlapping labels.
INFORCRM - 12202	In a Russian environment, the Contact detail view contains overlapping labels.
INFORCRM - 12204	In a Russian environment, the Edit Opportunity Contact dialog box contains truncated labels.

Defect	Description
INFORCRM - 12205	The Windows Client Query Builder conditions return incorrect results.
INFORCRM - 12223	In a Russian environment, the Attachments tab contains truncated labels.
INFORCRM - 12247	In a Russian environment, the Contract detail view contains truncated labels.
INFORCRM - 12254	In a Russian environment, the Lead detail view contains a truncated label.
INFORCRM - 12379	In a Russian environment, the Quick Find dialog box contains a truncated label.
INFORCRM - 12426	In a Russian environment, the Manage Product view contains truncated labels.
INFORCRM - 12427	In a Russian environment, the Update Quota view contains truncated labels.
INFORCRM - 12463	In a Russian environment, the Reports view contains a truncated label.

SNC Update 03 for Infor CRM version 8.3 addresses the following issues:

Defect	Description
INFORCRM - 5261	The scrollbar is not visible for the last record in a tab list.
INFORCRM - 10509	In a German environment, there are overlapping labels on the Manage Target list view.
INFORCRM - 11191	In a French or German environment, some dialog boxes and views do not resize properly.
INFORCRM - 11193	In a French environment, inserting a defect causes an error.
INFORCRM - 11194	In a French environment, inserting a ticket causes an error.
INFORCRM - 11195	The Share Groups dialog box does not resize properly.
INFORCRM - 11272	On the Insert Campaign dialog box labels are truncated.
INFORCRM - 11273	On the Add/Edit Campaign Stage dialog box labels are truncated.
INFORCRM - 11276	On the Campaign Manage Targets dialog box labels are truncated.
INFORCRM - 11279	When adding a user to a user's calendar in the Administrator, an EoleException error occurs.
INFORCRM - 11281	In a localized environment, the Insert Contact/Account dialog box contains truncated labels.
INFORCRM - 11283	In a localized environment, the Add Opportunity Product dialog box contains label truncations.

SNC Update 02 for Infor CRM version 8.3 addresses the following issues:

Defect	Description
INFORCRM - 8402	Contact names that contain umlauts are corrupted after performing a Mail Merge to Letter output to Email.
INFORCRM - 8951	When using the auto-populate feature of a ComboBox, certain Russian characters are mistranslated and return the wrong items for the lookup.
INFORCRM - 9368	The Sync Server has a memory leak.
INFORCRM - 9446	An error occurs when exporting a group to Excel if the Group name contains Cyrillic characters.
INFORCRM - 9472	In the Query Builder, using the IN Condition first causes all other conditions values to be corrupted when the query is saved.
INFORCRM - 9483	Team Names that contain Cyrillic characters are corrupted in the Share Team view.

Defect	Description
INFORCRM - 9491	Cyrillic characters in the Owner field are corrupted when exporting records to Microsoft Excel.
INFORCRM - 9713	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 - 9872	In a Russian environment, the navigation bar tooltips are corrupted.
INFORCRM - 9874	In a Russian environment, the right-click menu items are corrupted.
INFORCRM - 9876	In a Russian environment, in the Architect, project names with extended characters are corrupted.
INFORCRM - 9955	Activity Attendee and History Attendee records are not synchronized between host and remote databases.
INFORCRM-10218	In a Russian environment, the Contact Find displays corrupted characters.
INFORCRM-10219	In a Russian environment, the Query Builder title and group name do not display characters correctly.
INFORCRM-10371	In a Russian environment, when creating a new Mail Merge template, characters are corrupted.
INFORCRM-10374	In a Russian Architect, the Reopen Project list contains corrupted characters.
INFORCRM-10492	In a Russian Windows client, the Account detail view Notes/History tab contains truncated labels.
INFORCRM-10493	In a Russian Windows client, the Opportunity Add Product dialog box contains truncated buttons and labels.
INFORCRM-10494	In a Russian Windows client, when importing leads, the "Show all Fields" label and "Unmatch" button text are truncated.
INFORCRM-10586	Updated the Administrator help topic "Setting Outlook Options" to remove the statement that Advanced Outlook Integration (AOI) allows contact synchronization.
INFORCRM-11086	In a localized environment, Infor CRM Windows client forms do not resize unless the Plugin.Company is SalesLogix.

SNC Update 01 for Infor CRM version 8.3 addresses the following issues:

Defect	Description
INFORCRM-6225	Content that has been synchronized to a Unicode remote database from a Unicode host database does not display in the What's New view.
INFORCRM-8345	In a German environment, the Infor CRM Windows Client Query Builder Value Selection grid overlaps the 'OK', 'Abbrechen' and 'Hilfe' buttons.
INFORCRM-8846	Web Client Address Labels do not print in the correct format.
INFORCRM-8925	Cyrillic characters in the name of a template used for creating users from a template are corrupted.
INFORCRM-9495	The Advanced lookup cannot find strings with extended characters.
INFORCRM-9549	Document the steps for setting the ad hoc record threshold.
INFORCRM-10016	The useractivity_in_instead_ins trigger has a drop trigger that needs to be removed. Added both UserActivity_Int_Instead_Ins and UserActivity_Integration_Change triggers for 8.3.0.1.
INFORCRM-10017	In the Offline Web Client, the GroupTranslator.dll does not register properly.

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_v830_SNC_Update_05.zip	Infor_CRM_v830_SNC_Update_05.exe	
	Infor CRM v8.3.0 Update 04.sxb	
Infor_CRM_v830_SNC_Update_05.exe	Admin.chm	
	Admin.exe	8.3.0.2493
	ApplicationArchitect.chm	
	Architect.exe	8.3.0.2051
	DeveloperTips.chm	
	Getting Started with Infor CRM Windows Client.pdf	
	SalesLogix.exe	8.3.0.2493
	SLXControls.ocx	8.3.0.2229
	SLXLocal.exe	8.3.0.2229
	SLXMMEngine.dll	8.3.0.2051
	SLXMMGUI.dll	8.3.0.2493
	SLXSearchService.exe	8.3.0.2371
	SyncClient.exe	8.3.0.1405

File Name	File Contents	File Version
Infor CRM v8.3.0 Update 04.sxb	Create database objects: <ul style="list-style-type: none">■ Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS■ Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGES_A■ Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGES	
	Insert Plugin: <ul style="list-style-type: none">■ Forms Account: Attachments■ Forms Account: Notes-History■ Forms Contact: Attachments■ Forms Contact: Attachments■ Forms Contract: Attachments■ Forms Defect: Attachments■ Forms Lead: Attachments■ Forms Lead: Attachments■ Forms Opportunity: Attachments■ Forms Opportunity: Attachments■ Forms RMA: Attachments	

File Name	File Contents	File Version
	<ul style="list-style-type: none"> ■ Forms System: Account Detail ■ Forms System: Add Edit Campaign Stage ■ Forms System Add Edit Sales Order ■ Forms System: Add Edit Stage Task ■ Forms System: Add New Contact Account ■ Forms System: Add Opportunity Product ■ Forms System: Contact Detail ■ Forms System: Contract Detail ■ Forms System: Defect Detail ■ Forms System: Edit Opportunity Contact ■ Forms System: History Details View ■ Forms System: Import Leads ■ Forms System: Import Leads Options ■ Forms System: Insert Campaign ■ Forms System: Insert New Lead ■ Forms System: Insert New Ticket ■ Forms System: Insert Opportunity ■ Forms System: Lead Detail ■ Forms System: Manage Product ■ Forms System: Manage Targets ■ Forms System: Matching Leads ■ Forms System: MoveContact ■ Forms System: Opportunity Detail ■ Forms System: Potential Matches ■ Forms System: SLX Report Manager View ■ Forms System: UpdateQuota ■ Forms Ticket: Attachments ■ Reports Labels: A4 Avery L7162 - Address ■ Scripts VBScriptSystem:SLX_Common 	

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
- Web Host



Install the Infor CRM v8.3.0 Update 04.sxb bundle using the Administrator.

Before installing the Infor CRM v8.3.0 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_v830_SNC_Update_05.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v830_SNC_Update_05.exe**.
4. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.

Automated installations can be used to install the Infor CRM Client for new users. When the automated installation is updated using this method, it contains the initial version of the Infor CRM 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 v8.3.0 Update 04 bundle.



If the Infor CRM v8.3.0 Update 04.sxb is already installed, you may omit this section.



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 v8.3.0 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**.