Applying Web Core Update 02 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 Web Core Update 02 for Infor CRM version 8.3.

Prerequisites

The following Infor CRM software must be installed before installing this update:

- Infor CRM version 8.3
- 8.3 SNC Update 02

Do not install Web Core Update 02 for Infor CRM 8.3 on any other Infor CRM version.

Additional considerations

- Infor CRM Back Office Extension (ICBOE) requires the following updates:
  - SNC Update 02 for Infor CRM version 8.3
  - Core Update 02 for Infor CRM version 8.3
  - Model Update 02 for Infor CRM version 8.3

Contacting Infor

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

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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

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

Web Client

- Ability to refresh pricing for sales orders and quotes when using a price service.
  Access to this feature must be granted to users. For more information, see the Web Client online help topic "Enabling Refresh Pricing".

New Features in previous updates

Web Core updates are cumulative, so Web Core Update02 for Infor CRM version 8.3 contains fixes released in previous updates.

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

Web Client

- Creating an ad hoc group with a large number of records now uses the Job Manager.
- Improvements to Reporting performance.

Application Architect

- Ability to change the ad hoc group number of record threshold.

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

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

Defect	Description
INFORCRM - 5115	In a localized environment, changing the Opportunity status to Closed-Won should cause"Opportunity Closed" to display.
INFORCRM - 5179	During Daylight Saving Time recurring activities start date is an hour later than it is scheduled to start.
INFORCRM - 5773	When the Ticket detail view Journal tab is in the More Tab and the More tabs is dragged to middle pane, the Journal tab overlaps the other tabs.
INFORCRM - 6265	In the Entity Manager Filters tab, adding a filter and clicking OK does not display a prompt as expected.
INFORCRM - 6655	On a detail view, the first record in the Group List is not responsive after selecting a different record from the Recently Viewed list and then selecting the first record from the Group List.
INFORCRM - 6657	On change events run every time you click date controls added to a form preventing users from changing the date.
INFORCRM - 6664	When performing an Update from a list view, users are unable to use the Tab key to access pick list controls.
INFORCRM - 6668	Cannot save attachments with a "+" symbol in the file name.
INFORCRM - 6720	Default Lookup Condition option applies when adding the first condition to a lookup, but is ignored for any additional conditions.
INFORCRM - 7594	Look up controls defined with prefilters do not produce filtered results.
INFORCRM - 7746	Changes made via styleschema do not work with complex controls.
INFORCRM - 7941	In the Sync History list view, sorting the Error Message column causes an error.
INFORCRM - 8003	After editing an existing Pick List item users cannot update the associated Pick list field.
INFORCRM - 8092	Dragging an e-mail from Microsoft Outlook and dropping it on a Notes/History tab records the history item with the current date and time instead of the original date and time.
INFORCRM - 8206	Update Potential Matches will not return accounts with an account name that contains a single number, spaces, or several small words.
INFORCRM - 8609	Use a centralized caching infrastructure in AppIdMappingService instead of a private dictionary.
INFORCRM - 8974	In a CPQ environment, the Warehouse link on the Sales Order and Quote Detail view Products tab should be disabled for configurable products.
INFORCRM - 9534	When a custom ticket group that contains the TICKETASSIGNLIST field as a condition is shared to Everyone, any user other than Admin will receive an error when viewing the group.
INFORCRM - 9670	If an attachment file name contains multiple period, then the attachment description is truncated.
INFORCRM - 9710	When performing a Ticket Lookup based on the CreateUser, the lookup will only return up to 100 named users.
INFORCRM - 9734	On the Back Office detail view Price Services tab, an error occurs when the Valid End Point button is clicked.
INFORCRM - 9815	On the Quote deail view Products tab, changing the quantity of a product has no effect on the Extended Price (Quote) field.
INFORCRM - 9820	In Opportunity Statistics the Weighted Potential Total (Average) is miscalculated.

Defect	Description
INFORCRM - 9847	In a localized environment the Quote detail view Status is blank.
INFORCRM - 9851	In a localized environment, the Copy Quote Status is blank.
INFORCRM - 9888	Copy User Profile does not work when the Job Server has Process Isolation mode enabled.
INFORCRM - 9896	Provide a task to refresh prices for quote and sales order products that use a price and availability service.
INFORCRM - 9961	Customization bundles that contain a picklist from version 8.2 cause an install error.
INFORCRM - 9991	An unexpected error in ExecuteMailMerge() occurs when running Mail Merge from within a Sales Process.
INFORCRM - 9999	Converting a quote to a sales order should copy the Payment Terms, Requested By, Carrier, Comments (both header and line), and Customer RFQ in addition to the information that is currently copied.
INFORCRM-10000	The Promote and Get Order Total options should not be available on the detail views of closed quotes and sales orders.
INFORCRM-10001	Promoted quotes and sales orders should no longer be editable.
INFORCRM-10008	Price and availability service should include updated values in the product grid.
INFORCRM-10020	When Outbound on Delete is disabled and a user tries to delete line items a message should display informing the user that Outbound on Delete is disabled.
INFORCRM-10052	(ICBOE) During the initial load of data from the ERP system the process that updates the SYSINBOXSTATUS table and the IOBOX flag that indicates a record was processed can fail with a query timed out error.
INFORCRM-10061	The Application Architect status bar does not show the logged in user.
INFORCRM-10068	When the job service is restarted it should trigger new jobs for jobs that were in process during the restart or crashed.
INFORCRM-10069	(ICBOE) Line items without an ERP Line number should be deleted.
INFORCRM-10073	A standard user cannot change currency for quotes and sales orders.
INFORCRM-10103	Check for existing should be filtering by ObjectName, DBType, and Encoding. That is the unique index on the table.
INFORCRM-10108	(ICBOE) The ERP status should be populated with Approved or Disapproves when the Sync Quote BOD is published.
INFORCRM-10118	(ICBOE) The ValidateCountryCode in the ERPShipmentAddress BOD should point to IERPReceivableAddress instead of IERPShippmentAddress.
INFORCRM-10157	The Entity Manager detail view does not display.
INFORCRM-10162	In a German environment account names are corrupted in the Add Note dialog box.
INFORCRM-10200	(ICBOE) In an M3 integration: the old Unit of Measure is displayed in UOMs list even when SyncItemMaster BOD included an updated UOM code.
INFORCRM-10209	If the First Day of the Week is set to Monday and an activity is scheduled for a Sunday which is the 8th day of the month, the activity will not display on the Calendar.
INFORCRM-10211	When adding a target to a campaign Lead Source cannot be edited.
INFORCRM-10244	(ICBOE) Custom products should not generate a price and availability request.
INFORCRM-10288	Web Client does not function on Chrome version 51.

Defect	Description
INFORCRM-10382	(ICBOE) Inbound transactions should be processed when the Outbound txn for that noun does not have status=1.
INFORCRM-10383	(ICBOE) When we have an Outbound txn for a noun has actioncode= Add and status=1 a warning log should be logged to indicate the process will attempt to resend.
INFORCRM-10391	In a German environment the Library view will not load if the Library does not contain files or folders.
INFORCRM-10454	(ICBOE) When a new account entity is created for a back office the Appid's should not be entered in the SyncDigest table.
INFORCRM-10515	DateTime BOD elements should be UTC based DateTime values.
INFORCRM-10556	(ICBOE) Processing a bulk load causes a "Query timeout expired" exception error in the ION job.
INFORCRM-10689	When checking for duplicates using the potential matching index, it only finds matches on the first word of some fields, such as account or company in leads.
INFORCRM-10692	Upper method in QueryOver queries bypasses indexes in non-Unicode databases.
INFORCRM-10749	Add the Refresh Prices task to the Sales Order and Quote detail views Task Pane.
INFORCRM-10750	The SLXUserService should use ID, not user name.
INFORCRM-10783	(ICBOE) Validation for a promoted account when performing a price and availablity request is not necessary for CustomerPartyID and should be removed.
INFORCRM-10818	In the Application Architect an actions bundle will not apply if the database object table contains lots of records with a null value in an encoding field.
INFORCRM-10830	Unable to delete a lead.
INFORCRM-10957	Creating a sales order from an opportunity does not include the opportunity products unless there is history context which does not occur on the Mobile client.
INFORCRM-11179	(ICBOE) When an account is linked to an ERP system any associated quotes or sales orders cannot be deleted in Infor CRM

Issues fixed in previous updates

Web Core Updates are cumulative, so Web Core Update 02 for Infor CRM 8.3 contains fixes released in previous updates.

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

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

Defect	Description
INFORCRM-6223	Creating an ad hoc group with more than 10000 records does not include all selected records.
INFORCRM-6344	A duplicated translation in a resource file may cause an error in the Web Client.
INFORCRM-6754	The ID string in AddEditDialog.js is incorrectly exposed for translation.
INFORCRM-6907	Contact data is sometimes overwritten when navigating between records on the Contact detail view.

Defect	Description
INFORCRM-8045	When completing an activity any people added to the Availability tab (including leader) are not added to HistoryAttendee table so they do not show on All Participants tab of History record.
INFORCRM-8172	After adding a contact to the details in the Infor CRM Activity task pane in Microsoft Outlook, the IsAttendee column is null in the Infor CRM activity record.
INFORCRM-8397	In a German environment, the Infor CRM Web Client Query Builder, on the Assign Condition view the Cancel (Abberchen) button is truncated on the screen.
INFORCRM-8404	The internal processing of the 5 main build phases should run in parallel.
INFORCRM-8429	In the Dashboard the Number of Records value does not function in a group list chart.
INFORCRM-8640	In Application Architect, there needs to be a way to set the Manage Schema property for entities.
INFORCRM-8824	In an Oracle environment, filtered lookup results fail when results contain special characters.
INFORCRM-8837	Group column properties have different formats in the Web and Windows clients.
INFORCRM-8839	In the Web Client Ticket detail view, the Reset button clears two fields in the Details tab view when using an Internet Explorer browser.
INFORCRM-8847	Duplicated joins appear when a user creates a new entity related to existing entity.
INFORCRM-8869	In an Oracle 11g environment the Return Distinct Row Only causes HTTP:500 error when selecting filters in the task pane.
INFORCRM-8871	When accessing an offline Web Client with Turkish regional settings an error occurs.
INFORCRM-8875	Administrator does not show users that are logged into the Web client when using Windows Authentication.
INFORCRM-8879	User Security does not always update properly when changing Department or Team Membership from the Web client.
INFORCRM-8880	When using the German-Switzerland (de-ch) cultural code currency controls do not accept decimal values correctly.
INFORCRM-8883	Members added to the Availability tab when completing a meeting do not create records in the HistoryAttendee table.
INFORCRM-8884	In the Web client, the group conditions "starts with" and "contains" are not handled correctly.
INFORCRM-8894	In the Application Architect, if a legacy grid datasource references an entity with name beginning with 'I', the "I" is dropped which creates an invalid datasource.
INFORCRM-8918	Adding new tab on the EditQuoteItem quick form throws an exception error.
INFORCRM-8919	In the Application Architect, on the EditQuoteItem form adding a new page to the multi-tab causes an error.
INFORCRM-8956	DateTimePickerAdvancedPropertyEditor.json and FormBasicPropertyEditor.json contain Incorrect strings.
INFORCRM-8963	When you complete an unscheduled activity, changing the opportunity or ticket should not change the existing contact or account.
INFORCRM-9002	(ICBOE) The Promote link is not available to standard users on the Contact, Bill To and Pay From views.
INFORCRM-9020	(ICBOE) An error occurs when synchronizing an A+ BOD and the Code value is empty.

Defect	Description
INFORCRM-9026	(ICBOE) When you add a new account in ICBOE you cannot select a Carrier because the pick list is empty. This should either be a read only field or the pick list should have values.
INFORCRM-9032	(ICBOE) The Quote Expirtation date field should be required.
INFORCRM-9038	(ICBOE) When carriers are automatically created they do not have a LogicalID.
INFORCRM-9041	(ICBOE) Sales orders deleted in Infor CRM have a status of open in the process BOD.
INFORCRM-9042	(ICBOE) Location is not mandatory for a new sales order or quote, but the promotion process is asking for Location.
INFORCRM-9084	(ICBOE) Add mandatory fields ERP Document Date, ERP Status, ERP Start Date, ERP End Date to the Sales Order and Quote insert and detail views.
INFORCRM-9365	In an Oracle environment a custom Application Architect bundle to localize database items fails.
INFORCRM-9386	Replace the XmlDiff component with a method of checking if two model items are different.
INFORCRM-9412	(ICBOE) Converting a quote to a sales order should publish an updated ProcessQuote BOD.
INFORCRM-9416	(ICBOE) Pricing and Availability real-time service client needs performance improvement.
INFORCRM-9439	(ICBOE) Quote and sales order product prices are not updated ,when a warehouse is assigned to an unassigned warehouse product.
INFORCRM-9441	(ICBOE) Sales order and Quote records ,returerror "No default Sales Office is found in sales user profile or at customer".
INFORCRM-9471	In an environment with the de-ch culture code currency fields do not accept decimal values.
INFORCRM-9486	The Web Client Mail Merge Contact Lookup does not return any results.
INFORCRM-9488	The Mail Merge Opportunity Contact Lookup does not return any results.
INFORCRM-9496	There are cross scripting vulnerabilities in multiple lines of code.
INFORCRM-9497	There are cross scripting reflected vulnerabilities in a couple lines of code.
INFORCRM-9498	Multiple lines of code have a Validation.Required.URL vulnerability.
INFORCRM-9543	(ICBOE) When attempting to delete a converted Sales Order record, a Saleslogix error message displays.
INFORCRM-9585	The Sales Order and Quote snapshots Sub Total and Grand Total fields are not calculated correctly.
INFORCRM-9586	The secured action for Convert Quote to Order is not included in any of the out-of-the-box roles.
INFORCRM-9634	Addressed SQL injection vulnerabilities.
INFORCRM-9681	(ICBOE) Unable to add a new BOD Mapping to be referenced in the BOD template.
INFORCRM-9692	(ICBOE) The Unit of Measure" lookup does not filter based on selected product.
INFORCRM-9697	(ICBOE) The Back Office detail view Price List tab should be removed.
INFORCRM-9741	Implement HTML encoding for vulnerabilities.
INFORCRM-9748	(ICBOE) The ERPEXTID BOD field mapping is skipped when processing inbound BOD's.

Defect	Description
INFORCRM-9777	Several security items can be fixed by adding second and third parameter "StreamWriter(fs, Encoding.UTF8, 512):"
INFORCRM-9782	In the Infor CRM Xbar activity pane in Outlook, after completing a recurrence of a recurring activity no changes occur and the Completed Activity view does not display.
INFORCRM-9802	Add encoding to address security vulnerabilities.
INFORCRM-9855	(ICBOE) When changing the account on a quote the related addresses for bill to and ship to are not updated.
INFORCRM-9889	(ICBOE) Change the Available Warehouses dialog box title to "Available to Promise".

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_Web_Core_Update_02.zip	Infor_CRM_v830_Web_Core_Update_02.exe	
	ICRM v8.3 Core 02 VFS Actions.zip	
	ICRM v8.3.0 VFS Web Core Update 02.zip	
Infor_CRM_v830_Web_Core_Update_02.exe	ApplicationArchitect.exe	8.3.0.2066
	Bundler.exe	8.3.0.1270
	ConversionUtility.exe	8.3.0.2066
	GroupTranslator.dll	8.3.0.2052
	Sage.Platform.AdminModule.dll	8.3.0.1270
	Sage.Platform.Application.UI.WinForms.dll	8.3.0.2066
	Sage.Platform.Deployment.dll	8.3.0.1270
	Sage.Platform.dll	8.3.0.2066
	Sage.Platform.FileSystem.dll	8.3.0.2066
	Sage.Platform.IDEModule.dll	8.3.0.2066
	Sage.Platform.Orm.CodeGen.dll	8.3.0.1270
	Sage.Platform.Projects.dll	8.3.0.2066
	Sage.Platform.QuickForms.Designer.dll	8.3.0.1270
	Sage.Platform.QuickForms.dll	8.3.0.1270
	Sage.Platform.QuickForms.QFControls.dll	8.3.0.1270
	Sage.Platform.QuickForms.WebFormGen.dll	8.3.0.1270
	Sage.Platform.Upgrade.AdminModule.dll	8.3.0.1270

File Name	File Contents	File Version
	Sage.Platform.VirtualFileSystem.dll	8.3.0.1270
	Sage.Platform.WebPortal.Design.AdminModule.dll	8.3.0.2066
	Sage.Platform.WebPortal.Design.dll	8.3.0.1270
	Sage.Saleslogix.Activity.dll	8.3.0.2066
	Sage.Saleslogix.BundleModel.bundleactions.dll	8.3.0.2066
	Sage.Saleslogix.BusinessRules.dll	8.3.0.2066
	Sage.Saleslogix.dll	8.3.0.1270
	Sage.Saleslogix.Plugins.dll	8.3.0.2066
	Sage.Saleslogix.QuickForms.QFControls.Design.dll	8.3.0.1270
	Sage.Saleslogix.SchemaSupport.dll	8.3.0.2066
	Sage.Saleslogix.Security.dll	8.3.0.2066
	Sage.Saleslogix.Upgrade.AdminModule.dll	8.3.0.1270
	Sage.Saleslogix.Web.Controls.dll	8.3.0.2066
	Sage.Saleslogix.Web.dll	8.3.0.2066
	Sage.Scheduling.dll	8.3.0.2066
	SLXJobServer.exe	8.3.0.2066
ICRM v8.3.0 VFS Web Core Update 02.zip	_CountryAliasConversionDialogBase.js	
	Activity.js	
	Activity_ar.js	
	Activity_ca.js	
	Activity_cs.js	
	Activity_da.js	
	Activity_de.js	
	Activity_de-ch.js	
	Activity_el.js	
	Activity_en.js	
	Activity_en-gb.js	
	Activity_en-us.js	
	Activity_es.js	
	Activity_es-es.js	
	Activity_fi-fi.js	
	Activity_fr.js	
	Activity_fr-fr.js	
	Activity_he-il.js	
	Activity_hu.js	

File Name	File Contents	File Version
	Activity_it.js	
	Activity_it-it.js	
	Activity_ja-jp.js	
	Activity_ko-kr.js	
	Activity_nb.js	
	Activity_nl-nl.js	
	Activity_pl.js	
	Activity_pt.js	
	Activity_pt-br.js	
	Activity_pt-pt.js	
	Activity_ROOT.js	
	Activity_ru.js	
	Activity_sk.js	
	Activity_sl.js	
	Activity_sv.js	
	Activity_th.js	
	Activity_tr.js	
	Activity_zh-cn.js	
	Activity_zh-tw.js	
	ActivityCalendar.js	
	Activity-Combined.js	
	ActivityEditor.js	
	ActivityEditDialog.js	
	AddEditEntity.js	
	AddEditFiltersDialog.js	
	AddEditPropertiesDialog.js	
	Address.js	
	Admin.js	
	Admin_ar.js	
	Admin_ca.js	
	Admin_cs.js	
	Admin_da.js	
	Admin_de.js	
	Admin_de-ch.js	
	Admin_el.js	
	Admin_en.js	
	Admin_en-gb.js	
	Admin_en-us.js	
	Admin_es.js	

File Name	File Contents	File Version
	Admin_es-es.js	
	Admin_fi-fi.js	
	Admin_fr.js	
	Admin_fr-fr.js	
	Admin_he-il.js	
	Admin_hu.js	
	Admin_it.js	
	Admin_it-it.js	
	Admin_ja-jp.js	
	Admin_ko-kr.js	
	Admin_nb.js	
	Admin_nl-nl.js	
	Admin_pl.js	
	Admin_pt.js	
	Admin_pt-br.js	
	Admin_pt-pt.js	
	Admin_ROOT.js	
	Admin_ru.js	
	Admin_sk.js	
	Admin_sl.js	
	Admin_sv.js	
	Admin_th.js	
	Admin_tr.js	
	Admin_zh-cn.js	
	Admin_zh_tw.js	
	Admin-Combined.js	
	ApplicationStateService.js	
	BackOffice.BACKOFFICE.entity.xml	
	BackOfficeAcctEntity.BACKOFFICEACCTENTITY.entity.xml	
	Base.js	
	Base_ar.js	
	Base_ca.js	
	Base_cs.js	
	Base_da.js	
	Base_de-ch.js	
	Base_el.js	
	Base_en.js	
	Base_en-gb.js	

File Name	File Contents	File Version
	Base_en-us.js	
	Base_es.js	
	Base_es-es.js	
	Base_fi-fi.js	
	Base_fr.js	
	Base_fr-fr.js	
	Base_he-il.js	
	Base_hu.js	
	Base_it.js	
	Base_it-it.js	
	Base_ja-jp.js	
	Base_ko-kr.js	
	Base_nb.js	
	Base_nl-nl.js	
	Base_pl.js	
	Base_pt.js	
	Base_pt-br.js	
	Base_pt-pt.js	
	Base_ROOT.js	
	Base_ru.js	
	Base_sk.js	
	Base_sl.js	
	Base_sv.js	
	Base_th.js	
	Base_tr.js	
	Base_zh-cn.js	
	Base_zh-tw.js	
	Base-Combined.js	
	BODMapping.BODMAPPING.entity.xml	
	BOEPAService.BOEPASERVICE.entity.xml	
	browseField.ascx	
	BulkUpdateWidget.js	
	bundleData.xml	
	CanPromoteOpportunity.method.xml	
	ConditionManager.js	
	CountryAliasConversion.js	
	CountryTasksTasklet.js	
	currency.js	
	Dashboard.js	

File Name	File Contents	File Version
	Dashboard_ar.js	
	Dashboard_ca.js	
	Dashboard_cs.js	
	Dashboard_da.js	
	Dashboard_de.js	
	Dashboard_de-ch.js	
	Dashboard_el.js	
	Dashboard_en.js	
	Dashboard_en-gb.js	
	Dashboard_en-us.js	
	Dashboard_es.js	
	Dashboard_es-es.js	
	Dashboard_fi-fi.js	
	Dashboard_fr.js	
	Dashboard_fr-fr.js	
	Dashboard_he-il.js	
	Dashboard_hu.js	
	Dashboard_it.js	
	Dashboard_it-it.js	
	Dashboard_ja-jp.js	
	Dashboard_ko-kr.js	
	Dashboard_nb.js	
	Dashboard_nl-nl.js	
	Dashboard_pl.js	
	Dashboard_pt.js	
	Dashboard_pt-br.js	
	Dashboard_pt-pt.js	
	Dashboard_ROOT.js	
	Dashboard_ru.js	
	Dashboard_sk.js	
	Dashboard_sl.js	
	Dashboard_sv.js	
	Dashboard_th.js	
	Dashboard_tr.js	
	Dashboard_zh-ch.js	
	Dashboard_zh-tw.js	
	Dashboard-Combined.js	
	DateTimePicker.js	

File Name	File Contents	File Version
	DateTimePickerAdvancedPropertyEditor.js	
	DefaultDropHandler.js	
	Dialog.js	
	Dialog_ar.js	
	Dialog_ca.js	
	Dialog_cs.js	
	Dialog_da.js	
	Dialog_de.js	
	Dialog_de-ch.js	
	Dialog_el.js	
	Dialog_en.js	
	Dialog_en-gb.js	
	Dialog_en-us.js	
	Dialog_es.js	
	Dialog_es-es.js	
	Dialog_fi-fi.js	
	Dialog_fr.js	
	Dialog_fr-fr.js	
	Dialog_he-il.js	
	Dialog_hu.js	
	Dialog_it.js	
	Dialog_it-it.js	
	Dialog_ja-jp.js	
	Dialog_ko-kr.js	
	Dialog_nb.js	
	Dialog_nl-nl.js	
	Dialog_pl.js	
	Dialog_pt.js	
	Dialog_pt-br.js	
	Dialog_pt-pt.js	
	Dialog_ROOT.js	
	Dialog_ru.js	
	Dialog_sk.js	
	Dialog_sl.js	
	Dialog_sv.js	
	Dialog_th.js	
	Dialog_tr.js	
	Dialog_zh-cn.js	
	Dialog_zh-tw.js	

File Name	File Contents	File Version
	Dialog-Combined.js	
	DiscountChargeItem.DISCOUNTCHARGEITEM.entity.xml	
	DocCalculateCalcPrice.method.xml	
	DocCalculateSalesPotential.method.xml	
	DropDownSelectUser.js	
	Email.js	
	EntityDetailFilterGrid.js	
	EntityDetailPropertyGrid.js	
	EntityDetails.js	
	EntityDetailUtility.js	
	EntityProperties.js	
	ERPShipment.ERPSHIPMENT.entity.xml	
	File.js	
	FolderHandler.js	
	FormBasicPropertyEditor.js	
	GeneralSchemaReader.js	
	GridView.js	
	GroupListTasklet.js	
	GroupManager.js	
	Groups.js	
	HistoryEditor.js	
	layout.css	
	Lookup.js	
	MailMergeService.js	
	MailMergeService_ar.js	
	MailMergeService_ca.js	
	MailMergeService_cs.js	
	MailMergeService_da.js	
	MailMergeService_de.js	
	MailMergeService_de-ch.js	
	MailMergeService_el.js	
	MailMergeService_en.js	
	MailMergeService_en-gb.js	
	MailMergeService_en-us.js	
	MailMergeService_es.js	
	MailMergeService_es-es.js	
	MailMergeService_fi-fi.js	
	MailMergeService_fr.js	

File Name	File Contents	File Version
	MailMergeService_fr-fr.js	
	MailMergeService_he-il.js	
	MailMergeService_hu.js	
	MailMergeService_it.js	
	MailMergeService_it-it.js	
	MailMergeService_ja-jp.js	
	MailMergeService_ko-kr.js	
	MailMergeService_nb.js	
	MailMergeService_nl-nl.js	
	MailMergeService_pl.js	
	MailMergeService_pt.js	
	MailMergeService_pt-br.js	
	MailMergeService_pt-pt.js	
	MailMergeService_ROOT.js	
	MailMergeService_ru.js	
	MailMergeService_sk.js	
	MailMergeService_sl.js	
	MailMergeService_sv.js	
	MailMergeService_th.js	
	MailMergeService_tr.js	
	MailMergeService_zh-cn.js	
	MailMergeService_sh-tw.js	
	Manager.js	
	manifest.xml	
	MultiSelectPickList.js	
	Name.js	
	Numeric.js	
	OnBeforeUpdate.method.xml	
	Opportunity.OPPORTUNITY.entity.xml	
	OpportunityProduct.OPPORTUNITY_PRODUCT.entity.xml	
	OpportunityStatistics.js	
	PackageKitChildView.PACKAGEKITCHILDVIEW.entity.xml	
	PriceOrderHeader.method.xml	
	PriceQuoteHeader.method.xml	
	PricingAndAvailability.js	
	PricingAvailabilityWidget.html	
	PricingAvailabilityWidget.js	
	ProdPackageKitView.PRODPACKAGEKITVIEW.entity.xml	
	QuoteTasksTasklet.js	

File Name	File Contents	File Version
	Relationship.js	
	Report.js	
	Report_ar.js	
	Report_ca.js	
	Report_cs.js	
	Report_da.js	
	Report_de.js	
	Report_de-ch.js	
	Report_el.js	
	Report_en.js	
	Report_en-gb.js	
	Report_en-us.js	
	Report_es.js	
	Report_es-es.js	
	Report_fi-fi.js	
	Report_fr.js	
	Report_fr-fr.js	
	Report_he-il.js	
	Report_hu.js	
	Report_it.js	
	Report_it-it.js	
	Report_ja-jp.js	
	Report_ko-kr.js	
	Report_nb.js	
	Report_nl-nl.js	
	Report_pl.js	
	Report_pt.js	
	Report_pt-br.js	
	Report_pt-pt.js	
	Report_ROOT.js	
	Report_ru.js	
	Report_sk.js	
	Report_sl.js	
	Report_sv.js	
	Report_th.js	
	Report_tr.js	
	Report_zh-cn.js	
	Report_zh-tw.js	

File Name	File Contents	File Version
	Report-Combined.js	
	RePriceOrder.method.xml	
	RePriceQuote.method.xml	
	RoleSecurityService.js	
	Sage.js	
	Sage.Platform.dll	8.3.0.2066
	Sage.Platform.FileSystem.dll	8.3.0.2066
	Sage.Platform.Projects.dll	8.3.0.2066
	Sage.Platform.WebPortal.dll	8.3.0.1270
	Sage.Platform.WebPortal.resources.dll	8.3.0.1270
	Sage.SalesLogix.Activity.dll	8.3.0.2066
	Sage.SalesLogix.BusinessRules.dll	8.3.0.2066
	Sage.SalesLogix.BusinessRules.Jobs.CreateAdHocGroupJob.job.xml	
	Sage.SalesLogix.Client.MailMerge.dll	8.3.0.2066
	Sage.SalesLogix.dll	8.3.0.1270
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	8.3.0.1270
	Sage.SalesLogix.IntegrationContract.dll	8.3.0.2066
	Sage.SalesLogix.Plugins.dll	8.3.0.2066
	Sage.SalesLogix.Security.dll	8.3.0.2066
	Sage.SalesLogix.Services.PotentialMatch.dll	8.3.0.2066
	Sage.SalesLogix.SystemAdapter.dll	8.3.0.1270
	Sage.SalesLogix.Web.Controls.dll	8.3.0.2066
	Sage.SalesLogix.Web.dll	8.3.0.2066
	Sage.SalesLogix.Web.Modules.dll	8.3.0.1270
	Sage.SalesLogix.WebUserOptions.dll	8.3.0.1270
	Sage.Scheduling.dll	8.3.0.2066
	Sage_ar.js	
	Sage_ca.js	
	Sage_cs.js	
	Sage_da.js	
	Sage_de.js	
	Sage_de-ch.js	
	Sage_el.js	
	Sage_en.js	
	Sage_en-gb.js	
	Sage_en-us.js	
	Sage_es.js	
	Sage_es-es.js	
	Sage_fi-fi.js	

File Name	File Contents	File Version
	Sage_fr.js	
	Sage_fr-fr.js	
	Sage_he-il.js	
	Sage_hu.js	
	Sage_it.js	
	Sage_it-it.js	
	Sage_ja-jp.js	
	Sage_ko-kr.js	
	Sage_nb.js	
	Sage_nl-nl.js	
	Sage_pl.js	
	Sage_pt.js	
	Sage_pt-br.js	
	Sage_pt-pt.js	
	Sage_ROOT.js	
	Sage_ru.js	
	Sage_sk.js	
	Sage_sl.js	
	Sage_sv.js	
	Sage_th.js	
	Sage_tr.js	
	Sage_zh-cn.js	
	Sage_zh-tw.js	
	Sage-Combined.js	
	Saleslogix.Integration.BOE.Common.dll	8.3.0.2066
	Saleslogix.Integration.BOE.Jobs.dll	8.3.0.2066
	Saleslogix.Integration.BOE.PriceAndAvailability.dll	8.3.0.2066
	Saleslogix.Reporting.Jobs.dll	8.3.0.1270
	SalesOrderTasksTasklet.js	
	SData.js	
	SearchConditionWidget.js	
	Service.js	
	SimpleTextarea.js	
	SingleSelectPickList.js	
	SORPromote.method.xml	
	URL.js	
	Utility.js	
The following new schema was added or modified to accommodate the System of Record feature		

File Name	File Contents	File Version
	Opportunity ■ AlternateKeyPrefix ■ AlternateKeySuffix ■ ErpExtId ■ ErpVariationId ■ SyncStatus ■ ErpLocation ■ DocActualAmount - Decimal ■ DocSalesPotential - Double	
	DiscountChargeItem ■ UnitAdjustmentAmount - Double ■ DocUnitAdjustmentAmount – Double	
	PackageKitChildView (modified) ■ Product.ErpStatus property	
ICRM v8.3 Core 02 VFS Actions.zip	Create Database Object Definition ■ AttendeeRemoteSync(All) ■ DeleteObsoleteSmartParts ■ ProdPackageKitView ■■ Add ErpStatus Column (MSSQL) ■■ Add ErpStatus Column (Oracle) ■ PackageKitChildView ■■ Add ErpStatus Column (Oracle) ■■ Add ErpStatus Column (MSSQL)	
	Insert Record(s) ■ CUSTOMSETTINGS ■ BACKOFFICE ■ BODMAPPING ■ BODFIELDMAPPING ■ BACKOFFICEACCTENTITY	
	Insert Picklist ■ Calculation Methods ■ QuoteStatus ■ ErpQuoteStatus ■ SystemOfRecord	

File Name	File Contents	File Version
	Install Plugin ■ DashboardWidget System: Group List ■ DashboardWidget System: SData Feed ■ Group BODMAPPING:CustomBODMappings ■ Group BODMAPPING:StandardBODMappings ■ Group BODMAPPING:InactiveBODMappings ■ Group BODMAPPING:AllBODMapping ■ Group BODMAPPING:Active BOD Mappings	
	Add Secured Action(s) ■ Entities/Quote/GetOrderTotal ■ Entities/SalesOrder/GetOrderTotal ■ Entities/Quote/RefreshPricing ■ Entities/SalesOrder/RefreshPricing ■ Entities/Opportunities/Promote	
	Add Role(s) ■ Standard User	

Chapter 2
Applying the Update

2

This Web Core Update affects the following portals:

- Process Host
- SData
- Web Client
- Offline Web Client
- Customer Portal
- SLXJobService

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

- Administrative Tools and Servers
- Application Architect
- Web Host

Install the ICRM v8.3.0 VFS Web Core Update 02.zip and ICRM v8.3 Core 02 VFS Actions.zip bundles using the Application Architect, and then build and deploy your Web site(s).

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_Web_Core_Update_02.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v830_Web_Core_Update_02.exe**.
4. On the **Infor CRM v8.3.0 Web Core Update 02** screen do the following:
   a. Select the **Extract and Install the Infor CRM Update** option. The Update files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete. Selecting the other option prevents the VFS bundle from being available after the patch is installed, because the files are then deleted.
   b. Click **Change** to select the location where you want to store the update files.
      There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).
5. Click **Next**.
6. On the **Welcome** screen, click **Install** to install the patch.

7. If prompted to reboot, click **OK** to allow the reboot.
8. On the **Completed** screen, click **Finished**.

Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

To install the bundle

1. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
2. Open the **Application Architect**.
3. On the **View** menu, click **Bundle Manager**.
4. Click **Install**.
5. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.3.0 VFS Web Core Update 02.zip**, and then click **Open**.
6. On the **Select Bundle** screen, click **Next**.
7. On the **Select Items** screen, ensure the **Portals** option is selected.
8. Click **Next**, and then click **Finish**.
9. Rebuild the database schema.
    - On the **Tools** menu, click **Rebuild Database Schema**.
10. Repeat steps 3-8 to reapply the **ICRM v8.3 Core 02 VFS Actions.zip** bundle.

Running the Conversion Utility

The Conversion Utility contains two new options:

- **Create opportunity pretty key**

  This will assign the new AlternateKeyPrefix and AlternateKeySuffix properties added to Opportunity. The values assigned are based on existing pretty key formatting.

- **Convert opportunity document pricing properties**

  This will assign the new document pricing properties as follows:

  - Opportunity.DocSalesPotential = SalesPotential * ExchangeRate
  - Opportunity.DocActualAmount = ActualAmount * ExchangeRate
  - Opportunity_Product.DocCalculatedPrice = CalcPrice * ExchangeRate
  - Opportunity_Product.DocExtendedPrice = ExtendedPrice * ExchangeRate

This version of the Conversion Utility overwrites the version delivered in Infor CRM v8.3. Options visible in the Conversion Utility in Infor CRM v8.3 have been hidden and defaulted to false.

To Run

1. On the Administrative Workstation, browse to the ConversionUtility.config file.
   By default, this is in \Program Files (x86)\Saleslogix.
2. Open **ConversionUtility.config** with the text editor of your choice.
3. Scroll to the <connectionStrings> section and change the **Initial Catalog** value to your Saleslogix Connection Manager name.

For example:

Change the value from: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=SALESLOGIX;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>

Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabase;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>

4. Double click the **ConversionUtility** application.
5. In the Conversion Utility interface, click **Update**.

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**.

- By default, the Infor CRM 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 Web Client and/or Web remote Office until after the next Sync cycle.

7. Repeat steps 1-6 for each of the affected portals.

Enabling Permissions for Refresh Pricing

The Refresh Pricing feature enables users with appropriate permissions to update pricing information on Sales Orders and Quotes that have not yet been promoted. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Refresh Pricing feature will not be available to users who have not been assigned permissions.

To assign Refresh Pricing permissions

1. Sign into the **Infor CRM Web Client** as the **Administrative user**.
2. In the **Navigation** bar, expand **ADMINISTRATION**, expand **Roles**, and select the role assigned to users who are to be given permissions to Promote.
   You may choose to create a new role or assign these permissions to an existing role, such as the Standard Use role.

3. Click the **Actions** tab
4. Click the Add (plus) button.
5. In the **Lookup**, locate the secured action you want to assign
    - For permissions to refresh pricing on **Quotes**, select **Entities/RePriceQuote**.
    - For permissions to refresh pricing on **Sales Orders**, select **Entities/RePriceOrder**.
6. Double-click and then click **Close**.

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**.