



# Applying Web Core Update 06 for Version 8.3

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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 06 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 06



Do not install Web Core Update 06 for Infor CRM 8.3 on any other Infor CRM version.



Web Core Updates are cumulative. You do not need to install earlier Web Core updates before installing Web Core Update 06.

## 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](http://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](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 8.3.

## Features added in this update

Web Core Update 06 for Infor CRM version 8.3 includes the following new feature:

### Web Client

- Infor CRM with Infor Mingle
  - An updated WebProvisioningUI.exe that adds provisioning information to the Virtual File System (VFS).

Additional steps are required for implementing this new feature. For more information, see the *Infor CRM with Infor Mingle v8.3.0.06 Release Notes* or for new implementations of Infor CRM for Infor Ming.le see *Integrating Infor CRM with Infor Ming.le Infor Ming.le - Cloud Edition* or *Integrating Infor CRM with Infor Ming.le Infor Ming.le - On-premises Edition* documents.

### Application Architect

- Performance improvements for applying VFS bundles

## New Features added in previous updates

Web Core Updates are cumulative, so Web Core Update 06 for Infor CRM 8.3 contains features released in previous updates.

Web Core Update 05 for Infor CRM version 8.3 includes the following new features:

### Web Client

- Completed meetings now display contact and account information on the Calendar.
- Job Server clustering to allow load sharing across multiple machines or multiple nodes on the same machine and to monitor Job Server statistics using SData or Windows Performance Counters.

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

### Web Client

- Contour integration provides the ability to map contact and account addresses in order to view contacts and accounts that are near one another. You can also add places that are not contacts or accounts, such as a hotel or airport.  
Contour requires 8.3 Model Update 04 or later.

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

#### Web Client

- The ability to remove bad records from the Sync Digest table.
- Added the Back Office Extension option Numeric Culture to parse international numeric BOD values.

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".

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 06 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-5196	An ad-hoc group cannot be copied.
INFORCRM-5638	In a localized environment, in Job Manager's Schedules Detail view, 'Run As' did not translate.
INFORCRM-5640	In a localized environment, in Entity Manager, text did not translate.
INFORCRM-7003	Export to Excel would not format date/time as date/time if Infor CRM formatting is not set.
INFORCRM-7697	In Application Architect custom forms, unsaved changes will not save.
INFORCRM-9132	Process Sales Order BODs, are not sending currency ID information for some amount related items.
INFORCRM-9927	Add the Account.ErpExtId (CustomerParty/PartyIDs/id) to CPQ web service calls.
INFORCRM-10108	For Quote, ERP status not populated when Sync Quote BOD published with status Approved/Unapproved.
INFORCRM-10536	Multi-Currency textboxes not rendering correctly at low screen resolutions.



Defect	Description
INFORCRM-10911	Opportunity Tasks allows an unauthorized user to create a Sales Order.
INFORCRM-10949	Custom CSS not read or displayed correctly on a Quickform with a grid.
INFORCRM-11412	After adding a new user, the signed in user should be taken to the new user's detail view.
INFORCRM-11628	A Literature Request as part of Sales Process causes error.
INFORCRM-11937	Entities Manager mainview Group label is not translating.
INFORCRM-12042	Account names that include quote characters cause an error when Update Potential Matches is used.
INFORCRM-12089	Opportunity Product Grid shows wrong Price Level values.
INFORCRM-12189	If the Authorized Contacts group is filtered by Synced Source, Account Manager, or Owner an "Invalid column name 'T'" error occurs.
INFORCRM-12561	Opportunity Closed / Won screen updates the wrong Actual Amount currency.
INFORCRM-12722	In a localized environment, when promoting an account, in the resulting message "Account" is not translated.
INFORCRM-12761	In a German environment, when using the Move Contact option the Account Lookup only returns the account that the contact already belongs to.
INFORCRM-12763	Ampersands replaced with '&' in Query Builder Conditions.
INFORCRM-12774	In a localized environment, the right-click menu Lookup contains English dialog box titles.
INFORCRM-12777	Width of Lookup results columns cannot be changed.
INFORCRM-12804	When sending a campaign response to a contact on a campaign they have access to, but the contact is a target of a campaign the user does not have access to, an error occurs.
INFORCRM-12954	Under Notes/History, when creating a Note, if a user opens the Leader lookup no results are returned.
INFORCRM-13065	In Customer Portal the Edit Form button should not be visible on the Ticket Detail view.
INFORCRM-13121	(ICBOE) Accounting Entity Picklist controls are not sorted.
INFORCRM-13132	On Insert Opportunity screen, grids do not allow for deletion of items added.
INFORCRM-13176	Improve performance for installing language packs.
INFORCRM-13262	(ICBOE) The Visual SyncQuote Bods are failing.
INFORCRM-13299	In Ticket list view, when making the selection in Contact filter an Error occurs.
INFORCRM-13325	Under certain conditions, adding a new user causes an error to occur.
INFORCRM-13424	The contents of the App_Data\fslog (fail-safe log) folder are deleted when deploying a portal.
INFORCRM-13452	The BooleanParameterEditor does not take optional parameter prompts into consideration.
INFORCRM-13453	The Sage.MainView.ReportMgr.Crystal.*Editor controls should pass parameters to the server for optional parameter prompts, to avoid an EOleSysError in the Crystal Reports error at runtime.
INFORCRM-13475	The Account timeline is not showing all the events.
INFORCRM-13481	When synchronizing a to-do to Microsoft Outlook the notes field is truncated.
INFORCRM-13531	Infor Ming.le provisioning changes to the web.config are not saved to the VFS.
INFORCRM-13565	Using lowercase at the beginning of a sentence is preventing proper translation.

Defect	Description
INFORCRM-13568	In the Web Client Query Builder, editing a calculated field causes duplicate calculated fields or strings.
INFORCRM-13570	Setting the SalesOrderItem grid quantity to null causes an error.
INFORCRM-13577	Added drill backs from ERP to Infor CRM with a view definition file in ION.
INFORCRM-13636	During install of core VFS bundle, if the user node was expanded then some fields were not being added to UserSecurity table.
INFORCRM-13669	In a German environment, after installing ICRM 8.3.0.4 DE Language Pack no Jobs will run or appear in the Job Manager.
INFORCRM-13676	Remove the SQL Injection from the Contact group Duplicate Emails.
INFORCRM-13713	In any group other than Lookup Results, if you do a contact lookup the system returns the data but initializes and reloads the screen again.
INFORCRM-13745	If a Custom Form contains a large textbox it will become truncated if the tab it is on is dropped in the center pane.
INFORCRM-13785	Drag and drop of an e-mail is ignoring the user option for prompt or do not prompt.
INFORCRM-13841	In the Query Builder, the page displays incorrectly when unbalanced parenthesis are used in the conditions.
INFORCRM-13867	The record created in SyncHistory / SyncResult for the ACK BOD is created with status "In Process" instead of "Complete".
INFORCRM-13879	In a localized environment, under Sales - Contacts the Group name 'Missing Emails for Customer Portal' is displayed unlocalized.
INFORCRM-13921	Under some conditions the Web dashboards display incorrect numbers.
INFORCRM-13969	If an email has more than 64 characters in the subject line, after dragging and dropping the email from Microsoft Outlook to Infor CRM, the subject is truncated to 64 characters.
INFORCRM-14000	The Widget Definition label "Link" should be "Links".
INFORCRM-14109	When the client portal is deployed, there is an exception error with a duplicate app setting key.

## Issues fixed in previous updates

Web Core Updates are cumulative, so Web Core Update 06 for Infor CRM 8.3 contains fixes released in previous updates.

Web Core Update 05 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-2	Add the ability to schedule jobs by intervals of seconds.
INFORCRM-5003	Add Job Server clustering.
INFORCRM-7093	Pretty key logic should apply to all converted Sales Orders, Quotes, Returns, Invoice, Shipments, and Receivables.
INFORCRM-9041	Sales orders deleted in Infor CRM, should have a Process BOD status of 'Canceled', not 'Open'.

Defect	Description
INFORCRM-9154	Orphaned sales order address records are generated for valid SyncSalesOrder BODs.
INFORCRM-9160	(ICBOE) The Back Office Out of Sequence Message Expiration does not recognize that the "-1" flag value should disable automated expiration of entries.
INFORCRM-9217	(ICBOE) The Code Definition pick list is not deleted upon publishing the Code Definition BOD with a status of "Deleted".
INFORCRM-9226	(ICBOE) The ERP Sync Status field on an account or contact is not changed to "Awaiting Acknowledgment" when a back office user updates the record.
INFORCRM-9828	On the Dashboard, the column chart widget incorrectly formats values above 1,000,000.
INFORCRM-9916	In the Application Architect, the last dependency lookup in a series is always read/write instead of read-only.
INFORCRM-10174	Send to Word in the Web Client does not include the same information as the Windows Client does.
INFORCRM-10466	Address security "spoofing" vulnerabilities in the Web Client.
INFORCRM-10468	Address security cross-scripting vulnerabilities in the authentication redirect.
INFORCRM-10469	Address security cross-scripting vulnerabilities in GroupBuilder.
INFORCRM-10815	The Library lookup limits results to only 200 folders and 100 documents.
INFORCRM-10942	The Opportunity List View displays the Date Opened as one day behind after updating the Opened Date in Opportunity Snapshot.
INFORCRM-11548	When an account address is updated and the user selects the option to update the contact address, the contact address is not updated.
INFORCRM-11619	On the Account detail view Contacts tab, the contact e-mail link does not open a new email message.
INFORCRM-11676	In an Oracle environment, when using a UTF8 character set with multi-byte text the Notes field is truncated at 255 characters, not 255 bytes.
INFORCRM-11794	The IOBOXConnection registry stores the sysdba password as plain text.
INFORCRM-11868	(Infor Ming.le) Processing the SyncSecurity BOD causes error messages.
INFORCRM-11963	(Infor Ming.le) Simplify the Web Provision tool.
INFORCRM-12297	With a non-admin user account, it is possible to use queries to access contents of tables in the current database.
INFORCRM-12300	Query Builder allows blind SQL Injections.
INFORCRM-12309	Editing the Query Builder Assign Condition browser URL may expose users passwords.
INFORCRM-12405	Completed meetings on calendar do not show account or contact information except when hovering over the meeting.
INFORCRM-12434	Implement monitoring capabilities for Job Server clustering functionality.
INFORCRM-12496	(ICBOE) If a sales order is closed, the Ship To and Bill To Address boxes should be read-only.
INFORCRM-12600	(ICBOE) Duplicate Carrier records are being generated duplicates based on active Accounting Entities.
INFORCRM-12605	In a Mobile Client integrated with Infor Ming.le single sign-on, default entity groups are not loading.



Web Core Update 04 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 - 5932	Calculated fields added through the Web Client do not display in Query Builder.
INFORCRM - 9235	(ICBOE) If the Contact BOD does not contain data in the Phone and Fax fields, then the fields should be cleared in the Contact Detail view.
INFORCRM - 10470	Address security vulnerabilities when uploading an attachment.
INFORCRM - 10539	Phone numbers do not retain the correct format.
INFORCRM - 10613	Address control does not display as expected when a Style Scheme is set and either Read Only is True or Enabled is False.
INFORCRM - 11049	When the "Save attachments with e-mail messages (MSG format)" option is selected in Administrator, dragging and dropping an email does not save any attachments.
INFORCRM - 11399	(ICBOE) When ICBOE is installed, using the Realign Territories tool orphans the SECCODEID in the ERP tables.
INFORCRM - 11400	When using a touchscreen, Internet Explorer freezes when navigating between tabs and controls.
INFORCRM - 11621	After making an exception of one of the occurrences of a recurring appointment in Microsoft Outlook and then synchronizing, the first occurrence of the activity disappears.
INFORCRM - 11664	(ICBOE) Sync BODs with special characters are failing to update in Infor CRM.
INFORCRM - 11863	Removing a user from the User's Calendar tab removes the last entry in the list instead of the selected record.
INFORCRM - 11931	Dragging and dropping emails to the Ticket Activity tab does not automatically refresh the tab.
INFORCRM - 11968	In a localized environment, the Sync History List view common Tasks labels are not translated.
INFORCRM - 11987	Converting a quote that is linked with an opportunity to a sales order is also copying the products from the opportunity.
INFORCRM - 12038	Department names that contain an ampersand cause errors.
INFORCRM - 12040	Bundle by difference does not recognize updates to the OnBeforeInsert.method.xml files for Quotes and Sales Orders.
INFORCRM - 12144	Unnecessary security joins in user filter cause performance issues.
INFORCRM - 12145	Filters that use the SixRoles and SixTeams magic ranges cause performance issues.
INFORCRM - 12146	Optimize range filters with single English character ranges with GROUP BY condition.
INFORCRM - 12161	Queries used to generate filters consume a lot of resources.
INFORCRM - 12278	On the Activities view, the Next Month filter does not return any results.
INFORCRM - 12285	If the .NET framework calls a static constructor that fails on the first attempt, then the class is considered to be uninitialized which results in an exception in the ActivityRequestHandler and causes the web site to stop working for all users.
INFORCRM - 12363	(ICBOE) The Verb and BodType must be set in ProcessOutboundTxn before the call to the OutboundHandler.

Defect	Description
INFORCRM- 12501	After upgrading to 8.3.0.3, the sync worker job fails to run.
INFORCRM - 12537	In Query Builder newly-added local joins do not display in the tree view.
INFORCRM - 12599	(ICBOE) Updating document pricing on opportunity and opportunity product records may not use the correct exchange rate.
INFORCRM - 12750	The database update schema Unicode memo should be ignored for column size alter statements.
INFORCRM - 12788	Adding or removing records from ad hoc groups should update the group plugin ModifyDate.
INFORCRM - 12818	The Job Service does not generate an exception when the database schema is missing a required field.

Web Core Update 03 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 - 5022	The Group Manager right click menu contains duplicate options.
INFORCRM - 5096	In a Chinese environment, no records are returned when looking for a lead source from the Contact Detail view.
INFORCRM - 8777	Using Update Targets to change the Initial Target results in the error "Specified cast is not valid."
INFORCRM - 8815	In Security Manager view, selected option buttons do not display correctly.
INFORCRM - 9437	An account with a contact role is not removing the contact roles when same account with no contact roles is published.
INFORCRM - 9451	(ICBOE) Creating a new quote, or sales order should inherit the default warehouse from the associated account.
INFORCRM - 9492	In Query Builder, moving conditions changes Or conditions to And.
INFORCRM - 10378	In a Spanish environment, currency code and number controls do not update properly.
INFORCRM - 11017	When Multi-currency is configured Opportunity Statistics do not display currency correctly.
INFORCRM - 11067	In Application Architect, the IsEditable property on a grid cannot be edited.
INFORCRM - 11159	Clicking Refresh Pricing should display an error message if the Price and Availability service is not available.
INFORCRM - 11178	(ICBOE) Inbound BOD processing inherits the numeric parsing setting of the host server's Region and Language settings.
INFORCRM - 11185	(ICBOE) An outbound BOD is generated without promoting an opportunity when Outbound on Create is set to user triggered.
INFORCRM - 11190	After selecting a picklist field cannot tab into the combo box text to select a value.
INFORCRM - 11200	In an Offline Web Client environment the following error displays "The following SData diagnosis occurred: Description=Operation failed. Message=Invalid column name 'Filter'. HTTP status: Internal Server Error (500)."
INFORCRM - 11203	In an Oracle environment, quotes and sales orders with an ERP Status of "Deleted" are not updating.

Defect	Description
INFORCRM - 11260	Xbar is consuming, but not releasing licenses.
INFORCRM - 11277	Xbar consumes a license which causes an incorrect count in the remaining license pool.
INFORCRM - 11344	The Update Potential Matches dialog box is missing a scrollbar.
INFORCRM - 11407	When a database has 2,600 or more users Group Manager takes minutes to load and produces long-running script errors.
INFORCRM - 11409	Account Manager ID fields formatted as "User Name" display the wrong user name.
INFORCRM - 11524	When an occurrence of a recurring activity is completed in Infor CRM, notifications are sent to Exchange for up to seven days.
INFORCRM - 11540	There needs to be a way to remove bad records from the Sync Digest table.
INFORCRM - 11617	The Back Office Extension option for Numeric Culture needs to be added to the Web Client help.
INFORCRM - 11768	The Share Group Window does not accurately display to whom a group is shared.
INFORCRM - 11769	Sharing a group to a new user or team causes the group to no longer be shared to previous users or teams.
INFORCRM - 11801	In the Application Architect Bundle Manager, adding bundle actions Create Field or Drop Field displays error 'Must declare the scalar variable "@TableName".'

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 tab 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.

Defect	Description
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 AppldMappingService 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 periods, 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 detail 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.
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.



Defect	Description
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 Disapproved when the Sync Quote BOD is published.
INFORCRM-10118	(ICBOE) The ValidateCountryCode in the ERPShipmentAddress BOD should point to IERPReceivableAddress instead of IERPShipmentAddress.
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.
INFORCRM-10382	(ICBOE) Inbound transactions should be processed when the Outbound txn for that noun does not have status=1.
INFORCRM-10383	(ICBOE) When 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 availability request is not necessary for CustomerPartyID and should be removed.

Defect	Description
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

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.
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, in the Infor CRM Web Client Query Builder, on the Assign Condition view the Cancel (Abbrechen) 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 option causes an 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.

Defect	Description
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.
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 Expiration 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, returns error "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 Web Client Mail Merge Opportunity Contact Lookup does not return any results.

Defect	Description
INFORCRM-9496	There are cross scripting vulnerabilities in multiple lines of code.
INFORCRM-9497	There are cross scripting reflected vulnerabilities in multiple 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	Address 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.
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_06.zip	Infor_CRM_v830_Web_Core_Update_06.exe	
	ICRM v8.3 Core 06 VFS Actions.zip	
	ICRM v8.3.0 VFS Web Core Update 06.zip	
Infor_CRM_v830_Web_Core_Update_06.exe	ApplicationArchitect.exe	8.3.0.2066
	Bundler.exe	8.3.0.2655
	Common.Logging.Core.dll	3.3.1.0
	Common.Logging.dll	3.3.1.0
	Common.Logging.Log4Net1210.dll	3.3.1.0

File Name	File Contents	File Version
	ConversionUtility.exe	8.3.0.2655
	ConversionUtility.exe.config	
	Enyim.Caching.dll	2.16.0.0
	GroupTranslator.dll	8.3.0.2656
	Quartz.dll	2.4.1.0
	Sage.Platform.AdminModule.dll	8.3.0.2655
	Sage.Platform.Application.dll	8.3.0.2655
	Sage.Platform.Application.UI.WinForms.dll	8.3.0.2066
	Sage.Platform.BundleModel.AdminModule.dll	8.3.0.2655
	Sage.Platform.BundleModel.dll	8.3.0.2655
	Sage.Platform.Caches.Memcached.dll	8.3.0.2493
	Sage.Platform.CommonTree.dll	8.3.0.2655
	Sage.Platform.Deployment.AdminModule.dll	8.3.0.2655
	Sage.Platform.Deployment.dll	8.3.0.2655
	Sage.Platform.dll	8.3.0.2655
	Sage.Platform.FileSystem.dll	8.3.0.2493
	Sage.Platform.IDEModule.dll	8.3.0.2655
	Sage.Platform.Mashups.dll	8.3.0.2229
	Sage.Platform.Orm.CodeGen.dll	8.3.0.2493
	Sage.Platform.Projects.AdminModule.dll	8.3.0.2655
	Sage.Platform.Projects.dll	8.3.0.2066
	Sage.Platform.QuickForms.Designer.dll	8.3.0.2655
	Sage.Platform.QuickForms.dll	8.3.0.2655
	Sage.Platform.QuickForms.QFControls.dll	8.3.0.2655
	Sage.Platform.QuickForms.WebFormGen.dll	8.3.0.1270
	Sage.Platform.Upgrade.AdminModule.dll	8.3.0.2655
	Sage.Platform.VirtualFileSystem.dll	8.3.0.2493
	Sage.Platform.WebPortal.Design.AdminModule.dll	8.3.0.2066
	Sage.Platform.WebPortal.Design.dll	8.3.0.2655
	Sage.Platform.WebPortal.dll	8.3.0.2493
	Sage.Saleslogix.Activity.dll	8.3.0.2493
	Sage.Saleslogix.BundleModel.BundleActions.dll	8.3.0.2655
	Sage.Saleslogix.BusinessRules.dll	8.3.0.2655
	Sage.Saleslogix.Client.Reports.dll	8.3.0.2229
	Sage.Saleslogix.dll	8.3.0.2655
	Sage.Saleslogix.PickLists.dll	8.3.0.2371
	Sage.Saleslogix.Plugins.dll	8.3.0.2655
	Sage.Saleslogix.QuickForms.QFControls.Design.dll	8.3.0.1270
	Sage.Saleslogix.QuickForms.QFControls.dll	8.3.0.2655

File Name	File Contents	File Version
	Sage.Saleslogix.SchemaSupport.dll	8.3.0.2655
	Sage.Saleslogix.Security.dll	8.3.0.2655
	Sage.Saleslogix.System.dll	8.3.0.2655
	Sage.Saleslogix.Upgrade.AdminModule.dll	8.3.0.1270
	Sage.Saleslogix.Web.Controls.dll	8.3.0.2655
	Sage.Saleslogix.Web.dll	8.3.0.2655
	Sage.Scheduling.Client.dll	8.3.0.2493
	Sage.Scheduling.dll	8.3.0.2493
	Saleslogix.Integration.BOE.Common.dll	8.3.0.2655
	SLXJobServer.exe	8.3.0.2655
	SLXJobServer.exe.config_	
	SLXReportingAssistant.exe	8.3.0.2655
	SLXReportingAssistant.exe.config	
	WebProvision.exe	8.3.0.2493
	WebProvisionUI.exe	8.3.0.0
	WebProvisionUI.exe.config	
ICRM v8.3.0 VFS Web Core Update 06.zip	_BaseEntityDetailContent.js	
	_BaseTaskPaneTasklet.js	
	_CountryAliasConversionDialogBase.js	
	_ParameterEditorBase.js	
	Account.SICustomer.7db8c3cbb2504c5992b27c5be86589bf.relationship.xml	
	Account.SIRecommendation.10feca872c044ffca3e090a2c839fd30.relationship.xml	
	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	

File Name	File Contents	File Version
	Activity_es-mx.js	
	Activity_fi-fi.js	
	Activity_fr.js	
	Activity_fr-fr.js	
	Activity_he-il.js	
	Activity_hu.js	
	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	
	ActivityEditorAttendeesTab.js	
	ActivityGroupContextService.js	
	ActivityList.js	
	ActivityScheduler.js	
	ActivityService.js	
	addCalcField.ascx.resx	
	addCalcField.js	
	AddEditDialog.js	
	AddEditEntity.js	
	AddEditFiltersDialog.js	
	AddEditPropertiesDialog.js	

File Name	File Contents	File Version
	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	
	Admin_es-es.js	
	Admin_es-mx	
	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	



File Name	File Contents	File Version
	Admin_zh_tw.js	
	Admin-Combined.js	
	ajaxloading.gif	
	ApplicationStateService.js	
	Attachments.js	
	AttachmentList.js	
	BackOfficeAcctEntity.BACKOFFICEACCTENTITY.entity.xml	
	Base.js	
	Base_ar.js	
	Base_ca.js	
	Base_cs.js	
	Base_da.js	
	Base_de.js	
	Base_de-ch.js	
	Base_el.js	
	Base_en.js	
	Base_en-gb.js	
	Base_en-us.js	
	Base_es.js	
	Base_es-es.js	
	Base_es-mx.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	

File Name	File Contents	File Version
	Base_sl.js	
	Base_sv.js	
	Base_th.js	
	Base_tr.js	
	Base_zh-cn.js	
	Base_zh-tw.js	
	Base-Combined.js	
	BaseSDataStore.js	
	blackpin.png	
	bluepin.png	
	bluestar.png	
	BOEPAService.BOEPASERVICE.entity.xml	
	BooleanParameterEditor.js	
	browseField.ascx	
	browseField.js	
	BulkUpdateWidget.js	
	bundleData.xml	
	calcFields.js	
	CalendarUsersListPane.js	
	CanPromoteOpportunity.method.xml	
	Category.filter.xml	
	chartwidget.js	
	CheckBoxFilter.js	
	CheckEdit.method.xml	
	City.filter.xml	
	Common.Logging.Core.dll	3.3.1.0
	Common.Logging.dll	3.3.1.0
	Common.Logging.Log4Net1210.dll	3.3.1.0
	CommonTasksTasklet.js	
	ConditionManager.js	
	Contact.filter.xml	
	Contact.SICustomer.a2cd0fc43ad94003969b5780c58dc34e.relationship.xml	
	Contact.SIRecommendation.c9b6b5c60dd6421d96e214e2ea7504a7.relationship.xml	
	ContactUserAssociationEditor.js	
	CountryAliasConversion.js	
	Country.filter.xml	

File Name	File Contents	File Version
	CountryTasksTasklet.js	
	currency.js	
	CustomSetting.CUSTOMSETTINGS.entity.xml	
	Dashboard.js	
	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_es-mx.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	

File Name	File Contents	File Version
	Dashboard_zh-ch.js	
	Dashboard_zh-tw.js	
	Dashboard-Combined.js	
	DateTimePicker.js	
	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_es-mx.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	

File Name	File Contents	File Version
	Dialog_sl.js	
	Dialog_sv.js	
	Dialog_th.js	
	Dialog_tr.js	
	Dialog_zh-cn.js	
	Dialog_zh-tw.js	
	Dialog-Combined.js	
	DocCalculateCalcPrice.method.xml	
	DocCalculateSalesPotential.method.xml	
	DocumentDate.filter.xml	
	DropDownSelectUser.js	
	Email.js	
	EntityDetailFilterGrid.js	
	EntityDetailPropertyGrid.js	
	EntityDetails.js	
	EntityDetailUtility.js	
	EntityManagerGroupContextService.js	
	EntityProperties.js	
	Enyim.Caching.dll	2.16.0.0
	EPPlus.dll	4.0.3.0
	ERPBillTo.ERPBILLTO.entity.xml	
	ERPInvoice.ERPINVOICE.entity.xml	
	ERPPayFrom.ERPPAYFROM.entity.xml	
	ERPPerson.ERPPERSON.entity.xml	
	ERPReceivable.ERPRECEIVABLE.entity.xml	
	ERPShipment.ERPSHIPMENT.entity.xml	
	ERPShipTo.ERPSHIPTO.entity.xml	
	Feeds.js	
	FieldAttributeControlFactory.js	
	File.js	
	FilterManager.js	
	FolderHandler.js	
	FormBasicPropertyEditor.js	
	FSCOPY_Mingle_Backup.xml	
	GeneralSchemaReader.js	
	GeocodeEveryFifteenMinutesIndefinitely.trigger.xml	
	GeoCodeProviderConfiguration. GEOCODEPROVIDERCONFIGURATION.entity.xml	

File Name	File Contents	File Version
	GetOpportunityStatisticsForMashup.method.xml	
	greenpin.png	
	Grid.js	
	GridView.js	
	GroupContextService.js	
	GroupDetailSummary.html	
	GroupDetailSummary.js	
	GroupListTasklet.js	
	GroupLookup.js	
	GroupManager.js	
	GroupManagerActions.js	
	GroupManagerGroupContextService.js	
	GroupManagerTasksTasklet.js	
	GroupNavigator.js	
	Groups.js	
	GroupsListPanelConfig.js	
	GroupsTitlePaneConfigProvider.js	
	History.Account.60b106b811e648f4a421607c55c06c53.relationship.xml	
	History.Contact.5fe241ced27045c2876384dca2b9990d.relationship.xml	
	HistoryEditor.js	
	ImportHistory.IMPORTHISTORY.entity.xml	
	ImportLeadsWizard.js	
	infor-companyon-client.js	
	Integration.GeoCodeProviderConfiguration.8e9bb7a9ee4c41199bc90fe7ae4819c8.relationship.xml	
	IntegrationConfigGroup.INTEGRATIONCONFIGGROUP.entity.xml	
	InvoiceDate.filter.xml	
	JobManagerGroupContextService.js	
	JobNotificationPopup.js	
	Jobs.js	
	JobSchedulingWidget.js	
	jquery-2.2.3.min.js	
	layout.css	
	ListPanel.js	
	LiteratureManagementTasks.js	
	Lookup.js	
	LookupControl.js	

File Name	File Contents	File Version
	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_es-mx.js	
	MailMergeService_fi-fi.js	
	MailMergeService_fr.js	
	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	
	main.js	

File Name	File Contents	File Version
	Manager.js	
	manifest.xml	
	MergeAccount.method.xml	
	MingleSupport.js	
	MultiSelectPickList.js	
	MultiTab.js	
	Name.filter.xml	
	Name.js	
	NotesHistoryList.js	
	Numeric.js	
	OnAccountChanged.method.xml	
	OnAfterDelete.method.xml	
	OnAfterInsert.method.xml	
	OnAfterUpdate.method.xml	
	OnBeforeDelete.method.xml	
	OnBeforeErpStatusChanged.method.xml	
	OnBeforeInsert.method.xml	
	OnBeforeUpdate.method.xml	
	OnCreate.method.xml	
	OpportunityCompetitor. OPPORTUNITY_COMPETITOR.entity.xml	
	OpportunityProduct. OPPORTUNITY_PRODUCT.entity.xml	
	OpportunityStatistics.js	
	OpportunityTasksTasklet.js	
	orangepin.png	
	OwnerAssign.js	
	Phone.js	
	PickListName.filter.xml	
	pinkpin.png	
	Place.Address.31d7c82c36e549babbb4d53fdd42264f. relationship.xml	
	Place.PLACE.entity.xml	
	Place.User.ebed89d240b94a77986fd132894d49cf. relationship.xml	
	PriceOrderHeader.method.xml	
	PriceQuoteHeader.method.xml	
	PricingAndAvailability.js	
	PricingAvailabilityWidget.html	



File Name	File Contents	File Version
	PricingAvailabilityWidget.js	
	ProductRecommendation.filter.xml	
	PromoteRole.method.xml	
	PromoteUser.method.xml	
	PromoteWidget.js	
	PropensityScore.filter.xml	
	PropertyStore.js	
	purplepin.png	
	QBTreeStoreModel.js	
	Quartz.dll	2.4.1.0
	QueryBuilderMain.ascx	
	QueryBuilderMain.js	
	QuoteItem.QUOTEITEM.entity.xml	
	QuoteTasksTasklet.js	
	redpin.png	
	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_es-mx.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	

File Name	File Contents	File Version
	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	
	Report-Combined.js	
	RePriceLineItems.method.xml	
	RePriceOrder.method.xml	
	RePriceQuote.method.xml	
	Request.js	
	RequestItemPriceService.method.xml	
	Return.RMA.entity.xml	
	ReturnReceivedProduct. RMARECEIVEDPRODUCT.entity.xml	
	Role.ROLE.entity.xml	
	RoleSecurityService.js	
	RoleTasklet.js	
	Sage.Common.Syndication.dll	1.0.6.263
	Sage.Integration.Client.dll	1.0.6.262
	Sage.js	
	Sage.Platform.Application.dll	8.3.0.2655
	Sage.Platform.BundleModel.dll	8.3.0.2229
	Sage.Platform.Caches.Memcached.dll	8.3.0.2493
	Sage.Platform.dll	8.3.0.2655
	Sage.Platform.FileSystem.dll	8.3.0.2493
	Sage.Platform.Mashups.dll	8.3.0.2229
	Sage.Platform.Orm.CodeGen.dll	8.3.0.2493
	Sage.Platform.Projects.dll	8.3.0.2066

File Name	File Contents	File Version
	Sage.Platform.QuickForms.dll	8.3.0.2655
	Sage.Platform.QuickForms.QFControls.dll	8.3.0.2655
	Sage.Platform.Scheduling. ISchedulerJobStoreService.service.xml	
	Sage.Platform.Scheduling.SData.dll	8.3.0.2493
	Sage.Platform.SDataServices.dll	8.3.0.2493
	Sage.Platform.VirtualFileSystem.dll	8.3.0.2493
	Sage.Platform.WebPortal.Design.dll	8.3.0.2493
	Sage.Platform.WebPortal.dll	8.3.0.2493
	Sage.Platform.WebPortal.resources.dll	8.3.0.1270
	Sage.SalesLogix.Activity.dll	8.3.0.2493
	Sage.SalesLogix.BusinessRules.dll	8.3.0.2655
	Sage.SalesLogix.BusinessRules.Jobs. CreateAdHocGroupJob.job.xml	
	Sage.SalesLogix.BusinessRules.Jobs. GeocodeJob.job.xml	
	Sage.SalesLogix.Client.GroupBuilder.dll	8.3.0.2655
	Sage.SalesLogix.Client.ImportHistory.Modules.dll	8.3.0.2655
	Sage.SalesLogix.Client. IntegrationContract.Modules.dll	8.3.0.2655
	Sage.SalesLogix.Client.MailMerge.dll	8.3.0.2655
	Sage.SalesLogix.Client.Reports.dll	8.3.0.2229
	Sage.SalesLogix.dll	8.3.0.2655
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	8.3.0.2655
	Sage.SalesLogix.IntegrationContract.dll	8.3.0.2655
	Sage.SalesLogix. IntegrationContract. SyncEngine.dll	8.3.0.2371
	Sage.SalesLogix.PickLists.dll	8.3.0.2371
	Sage.SalesLogix.Plugins.dll	8.3.0.2655
	Sage.SalesLogix.QuickForms. QFControls.dll	8.3.0.2655
	Sage.SalesLogix.SchemaSupport.dll	8.3.0.2655
	Sage.SalesLogix.Security.dll	8.3.0.2655
	Sage.SalesLogix.Services.Import.dll	8.3.0.2493
	Sage.SalesLogix.Services.Integration.dll	8.3.0.2229
	Sage.SalesLogix.Services.PotentialMatch.dll	8.3.0.2655
	Sage.SalesLogix.System.dll	8.3.0.2655
	Sage.SalesLogix.SystemAdapter.dll	8.3.0.2655
	Sage.SalesLogix.Web.Controls.dll	8.3.0.2646
	Sage.SalesLogix.Web.dll	8.3.0.2655

File Name	File Contents	File Version
	Sage.SalesLogix.Web.Modules.dll	8.3.0.2493
	Sage.SalesLogix.WebUserOptions.dll	8.3.0.1270
	Sage.Scheduling.Client.dll	8.3.0.2493
	Sage.Scheduling.dll	8.3.0.2493
	Sage.SnippetLibrary.CSharp.@.a35da581-1ec4-40c2-9a6e-4856bdd04fe3.codesnippet.cs	
	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_es-mx.	
	Sage_fi-fi.js	
	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	

File Name	File Contents	File Version
	Sage_sv.js	
	Sage_th.js	
	Sage_tr.js	
	Sage_zh-cn.js	
	Sage_zh-tw.js	
	Sage-Combined.js	
	sage-controls-timeline.js	
	sage.platform.css	
	sage-platform-tabworkspace.js	
	sage-styles.css	
	Saleslogix.Geocode.dll	8.3.0.2493
	Saleslogix.Import.dll	8.3.0.2655
	Saleslogix.Integration.BOE.Common.dll	8.3.0.2655
	Saleslogix.Integration.BOE.Jobs.dll	8.3.0.2655
	Saleslogix.Integration.BOE. PriceAndAvailability.dll	8.3.0.2371
	Saleslogix.Reporting.Jobs.dll	8.3.0.2655
	Saleslogix.SData.Client.dll	2.0.1.1559
	Saleslogix.SDataSyncJob.dll	8.3.0.2655
	SalesOrder.SALESORDER.entity.xml	
	SalesOrderItem.SALESORDERITEMS.entity.xml	
	SalesOrderTasksTasklet.js	
	ScheduleDetailSummary.html	
	SData.js	
	sdata-client.js	
	sdata-client-debug.js	
	SearchConditionWidget.js	
	SearchMenuItem.js	
	SecurityManager.js	
	Service.js	
	Share_16x16.png	
	SICustomer.SICUSTOMER.entity.xml	
	SICustomer.SIRecommendation. 111430e0d1344b1580ad8cb9b3c53df3.relationship.xml	
	SimpleTextarea.js	
	SingleEntrySDataStore.js	
	SingleSelectPickList.js	
	SIRationale.SIRATIONALE.entity.xml	
	SIRecommendation.SIRationale. 4e17c7cbf64f4e298e9d9f3fb143a304.relationship.xml	

File Name	File Contents	File Version
	SIRecommendation.SIRECOMMENDATION.entity.xml	
	SORPromote.method.xml	
	star.png	
	State.filter.xml	
	SumExtendedCost.filter.xml	
	SumGrandTotal.filter.xml	
	SummaryContainer.js	
	SumTotalAmount.filter.xml	
	SyncHistoryTasksTasklet.js	
	TabController.js	
	tealpin.png	
	TitleContentPane.js	
	URL.js	
	User.USERSECURITY.entity.xml	
	UserService.js	
	UserTasklet.js	
	Utility.js	
	ValidateBOEPAService.method.xml	
	ValidateGeocodeProvider Configuration.method.xml	
	ValidatePriceItems.method.xml	
	widget.js	
	WidgetDefinition.js	
	WidgetEditor.js	
	yellowpin.png	
	yellowstar.png	
The following new schema was added or modified to accommodate the System of Record feature		
	Opportunity <ul style="list-style-type: none"> <li>■ AlternateKeyPrefix</li> <li>■ AlternateKeySuffix</li> <li>■ ErpExtId</li> <li>■ ErpVariationId</li> <li>■ SyncStatus</li> <li>■ ErpLocation</li> <li>■ DocActualAmount - Decimal</li> <li>■ DocSalesPotential - Double</li> </ul>	

File Name	File Contents	File Version
	DiscountChargeItem <ul style="list-style-type: none"> <li>■ UnitAdjustmentAmount - Double</li> <li>■ DocUnitAdjustmentAmount – Double</li> </ul>	
	PackageKitChildView (modified) <ul style="list-style-type: none"> <li>■ Product.ErpStatus property</li> </ul>	
ICRM v8.3 Core 06 VFS Actions.zip	<ul style="list-style-type: none"> <li>■ AttendeeRemoteSync(All)</li> <li>■ CRMPREFIXFORROLES</li> <li>■ DeleteObsoleteSmartParts</li> <li>■ DependencyLookupControl(All)</li> <li>■ FixAttendeeRolePicklist (Oracle)</li> <li>■ FixOpportunityDateOpenedType(All)</li> <li>■ PackageKitChildView               <ul style="list-style-type: none"> <li>■ Add ErpStatus Column (MSSQL)</li> <li>■ Add ErpStatus Column (Oracle)</li> </ul> </li> <li>■ PickListItemView(MSSQL)</li> <li>■ PlaceRemoteSync</li> <li>■ ProdPackageKitView               <ul style="list-style-type: none"> <li>■ Add ErpStatus Column (MSSQL)</li> <li>■ Add ErpStatus Column (Oracle)</li> </ul> </li> <li>■ Remove duplicate CustomSetting records</li> <li>■ Remove Invalid ObjectNames (MSSQL)</li> <li>■ SetMaxFavoriteGroups</li> <li>■ UpdateMSSQLConfigurationID</li> <li>■ UpdateOracleConfigurationID</li> <li>■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_A (MSSQL)</li> <li>■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_U (MSSQL)</li> <li>■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_A (Oracle)</li> <li>■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_U (Oracle Unicode)</li> <li>■ USERSECURITY_USERNAME_LENGTH_A (Oracle)</li> <li>■ USERSECURITY_USERNAME_LENGTH_U (Oracle Unicode)</li> <li>■ USERSECURITY_USERNAME_LENGTH_U(MSSQL)</li> <li>■ USERSECURITY_USERNAME_LENGTH_A(MSSQL)</li> </ul>	

File Name	File Contents	File Version
	<p>Create Field</p> <ul style="list-style-type: none"> <li>■ PLUGIN.CUSTOMFLAG</li> </ul> <p>Insert Record(s)</p> <ul style="list-style-type: none"> <li>■ APPIDMAPPING</li> <li>■ BACKOFFICE</li> <li>■ BACKOFFICEACCTENTITY</li> <li>■ BODFIELDMAPPING</li> <li>■ BODMAPPING</li> <li>■ CUSTOMSETTINGS</li> <li>■ INDEXDEFINITION</li> <li>■ INTEGRATION</li> <li>■ JOINDATA</li> <li>■ USEROPTIONDEF</li> </ul>	
	<p>Insert Picklist</p> <ul style="list-style-type: none"> <li>■ Calculation Methods</li> <li>■ QuoteStatus</li> <li>■ ErpAccountStatus</li> <li>■ ErpQuoteStatus</li> <li>■ SearchClause</li> <li>■ SyncStatus</li> <li>■ SystemOfRecord</li> </ul> <p>Create Index</p> <ul style="list-style-type: none"> <li>■ BACKOFFICE.LOGICALID_IDX</li> <li>■ DISCOUNTCHARGEITEM.DISTRIBUTEDTAXSOID_IDX</li> <li>■ DISCOUNTCHARGEITEM.DISTRIBUTEDTAXSOITEMID_IDX</li> <li>■ DISCOUNTCHARGEITEM.INVOICEID_IDX</li> <li>■ DISCOUNTCHARGEITEM.INVOICEITEMID_IDX</li> <li>■ DISCOUNTCHARGEITEM.QuoteId_IDX</li> <li>■ DISCOUNTCHARGEITEM.QuoteItemId_IDX</li> <li>■ DISCOUNTCHARGEITEM.ReceivableId_IDX</li> <li>■ DISCOUNTCHARGEITEM.SALESORDERID_IDX</li> <li>■ DISCOUNTCHARGEITEM.SALESORDERITEMSID_IDX</li> <li>■ DISCOUNTCHARGEITEM.ShipmentId_IDX</li> <li>■ SICUSTOMER.SICUSTOMER_CUSTOMERID</li> <li>■ SIRECOMMENDATION.SIRECOMMENDATION_CUSTOMERID</li> </ul>	



File Name	File Contents	File Version
	<p>Custom Settings</p> <ul style="list-style-type: none"> <li>■ [Groups] CreatePivot = True</li> <li>■ [Groups] MaxExportRecordCount = 65000</li> </ul> <p>Install Plugin</p> <ul style="list-style-type: none"> <li>■ [ACOGroup]:ACCOUNT: Sales Intelligence</li> <li>■ [ACOGroup]:Contact: Sales Intelligence</li> <li>■ [ACOGroup]:Contact: Duplicate Emails</li> <li>■ CrystalReport: Opportunity: Opportunity Detail</li> <li>■ DashboardWidget System: Column Chart</li> <li>■ DashboardWidget System: Group List</li> <li>■ DashboardWidget System: SData Feed</li> <li>■ Group BODMAPPING:CustomBODMappings</li> <li>■ Group BODMAPPING:StandardBODMappings</li> <li>■ Group BODMAPPING:InactiveBODMappings</li> <li>■ Group BODMAPPING:AllBODMapping</li> <li>■ Group BODMAPPING:Active BOD Mappings</li> <li>■ Group CUSTOMSETTINGS:All Custom Settings</li> <li>■ Group PLACE:AllPlaces</li> <li>■ Group PLACE:MyPlaces</li> <li>■ Group PLACE:SharedPlaces</li> </ul>	

File Name	File Contents	File Version
	<p>Add Secured Action(s)</p> <ul style="list-style-type: none"> <li>■ Administration/CustomSetting/Add</li> <li>■ Administration/CustomSetting/Delete</li> <li>■ Administration/CustomSetting/Edit</li> <li>■ Administration/CustomSetting/View</li> <li>■ Administration/GroupManager/Groups/ToggleUserDefault</li> <li>■ Contour/Map/Account</li> <li>■ Contour/Map/Contact</li> <li>■ Contour/Map/Group</li> <li>■ Contour/Map/Menu</li> <li>■ Entities/Opportunity/Promote</li> <li>■ Entities/Place/Add</li> <li>■ Entities/Place/Delete</li> <li>■ Entities/Place/Edit</li> <li>■ Entities/Place/Share</li> <li>■ Entities/Place/ShareDelete</li> <li>■ Entities/Place/ShareEdit</li> <li>■ Entities/Place/View</li> <li>■ Entities/Quote/GetOrderTotal</li> <li>■ Entities/Quote/RePriceQuote</li> <li>■ Entities/SalesOrder/GetOrderTotal</li> <li>■ Entities/SalesOrder/RePriceOrder</li> <li>■ Entities/Role/Promote</li> <li>■ Entities/User/Promote</li> <li>■ Navigation/Administration/View</li> <li>■ Navigation/Integration/View</li> <li>■ Navigation/Marketing/View</li> <li>■ Navigation/Sales/View</li> <li>■ Navigation/Service/View</li> <li>■ Navigation/Support/View</li> <li>■ Toolbar/Administration/View</li> <li>■ Toolbar/New/View</li> <li>■ Toolbar/Schedule/View</li> <li>■ Toolbar/Tools/AdvancedSpeedsearch/View</li> <li>■ Toolbar/Import History/View</li> <li>■ Toolbar/LiteratureRequestManagement/View</li> <li>■ Toolbar/Options/View</li> <li>■ Toolbar/Tools/View</li> </ul>	

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File Name	File Contents	File Version
	Add Role(s) <ul style="list-style-type: none"><li>■ Administrator</li><li>■ Standard User</li><li>■ Contour</li></ul>	



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# 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
- Offline Web Client
- Web Host




Install the VFS 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. Stop all Infor CRM services on the computer to which you are applying the Update in the following order:
  - Saleslogix Cache Server
  - Saleslogix DBEventing
  - Saleslogix Job Service
  - Saleslogix Messaging Server
  - Saleslogix SData Synchronization Server
  - Saleslogix SpeedSearch
  - Saleslogix Synchronization Service
  - Saleslogix Server
  - Saleslogix System Service

3. Extract the contents of the **Infor\_CRM\_v830\_Web\_Core\_Update\_06.zip** file to a temporary folder.
4. Navigate to the folder where you extracted the Update files and double-click **Infor\_CRM\_v830\_Web\_Core\_Update\_06.exe**.
5. On the **Infor CRM v8.3.0 Web Core Update 06** 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).
6. Click **Next**.
7. On the **Welcome** screen, click **Install** to install the patch.
8. If prompted to reboot, click **OK** to allow the reboot.
9. On the **Completed** screen, click **Finished**.



The first time you sign in to the Application Architect after installing 8.3 Web Core Update 05 or later, you will be prompted to upgrade the Virtual File System (VFS). Click Yes to confirm the upgrade.

## 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 06.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 apply the **ICRM v8.3 Core 06 VFS Actions.zip** bundle.

## Modifying the SLXJobServer Configuration file

The SLXJobServer.exe.config\_ file contains the following enhancement:

- Clustering to allow load sharing across multiple machines or multiple nodes on the same machine and to monitor Job Server statistics using SData or Windows Performance Counters.

To enable SLXJobServer.exe.config enhancements

- Do one of the following:
  - If the existing SLXJobServer.exe.config file has not been customized, delete the original file, and then rename the **SLXJobServer.exe.config\_** file by removing the underscore "\_".
  - If the existing SLXJobServer.exe.config file has been customized, use a comparison tool to merge the contents of both files into a single file named **SLXJobServer.exe.config**.

## Running the Conversion Utility



You must run the conversion utility even if you already ran the conversion utility during a previous update.

The Conversion Utility contains these new options:

- **Move CPQ Rulesets to Product CPQ Tab**  
This option is required for implementations with Infor Configure Price Quote (CPQ). This will move the new Product Ruleset from the configuration tab to the Product detail view CPQ Details tab.
- **Create default favorite groups**  
The Group Favorites feature was added to limit the number of groups that display as tabs in the list and detail views. This designates standard Infor CRM groups and any groups that are used as default group layout or Lookup results groups as Favorite groups.
- **Migrate Secured Actions for all user roles**  
New secured actions were implemented for menu bar and navigation bar items. This will add the following new secured actions to all user roles, except the Contour role which is explicitly used for Contour functionality:
  - Navigation/Sales/View
  - Navigation/Marketing/View
  - Navigation/Service/View
  - Navigation/Support/View
  - Navigation/Administration/View
  - Navigation/Integration/View
  - Toolbar/New/View
  - Toolbar/Schedule/View
  - Toolbar/Tools/View
  - Toolbar/Administration/View
  - Toolbar/Tools/LiteratureRequestManagement/View
  - Toolbar/Tools/ImportHistory/View
  - Toolbar/Tools/Options/View
  - Toolbar/Tools/AdvancedSpeedsearch/View

The Conversion Utility also contains these options:



You do not have to select the following options if you already ran the conversion utility during 8.3 Core Update 04 or 05.

- **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

- **Create account and contact pretty key**

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

- **Convert Proximity Search to Contour**

For implementations that included Proximity Search only. In update 04 for Infor CRM version 8.3, Proximity Search was replaced with Contour. Proximity Search is a third-party tool that provides functionality similar to that provided by Contour. It was available for both LAN and Web. Selecting this option to convert copies the data from tables and fields used by Proximity Search into tables and fields used by Contour. After the conversion, you may still be able to use Proximity Search on the LAN, however this is not a supported scenario and Proximity Search and Contour will not exchange data.



- Contour requires 8.3 Model update 04 or later.
- Additional steps are required to upgrade from Proximity Search to Contour. These steps are available in KB 1867584 which can be accessed from the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).



This version of the Conversion Utility overwrites the version delivered in Infor CRM v8.3. This version only includes the updates delivered in 8.3.0.01 through 8.3.0.06. If you have not already run the 8.3 Conversion Utility you must first run the 8.3 version of the Conversion Utility before you may upgrade to 8.3.0.06.

### 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 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=&quot;PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE&quot;"/>

Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabase;Data Source=localhost;Extended



```
Properties=&quot;PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE&quot;"/>
```

4. Double click the **ConversionUtility** application.
5. In the Conversion Utility interface, clear any actions you do not want to run and click **Update**.

## Updating the SLXJobService portal tenant.config (Sync for Exchange or Sync for Gmail only)

If your implementation uses Sync for Exchange or Sync for Gmail, then you must update the SLXJobService portal tenant.config file.



These steps are only required for implementations using Sync for Exchange or Sync for Gmail. If you do not use either integration, then you may continue to ["Building and deploying the Web changes" on page 46](#).

### To update the tenant.config

1. In Application Architect, open the **Virtual File System Explorer**.
2. Expand **Portal Manager**.
3. Expand **Saleslogix Job Service**.
4. Expand **SupportFiles**.
5. Open the **tenant.config** with the text editor of your choice.
6. Scroll to the **<runtime>** section.
7. Add the following:

```
<dependentAssembly>
<assemblyIdentity name="Saleslogix.SData.Client" publicKeyToken="ca62383dd1d25f65"/>
<bindingRedirect oldVersion="2.0.0.0-2.0.1.1554" newVersion="2.0.0.0" />
</dependentAssembly>
<dependentAssembly>
<assemblyIdentity name="Common.Logging" publicKeyToken="af08829b84f0328e" />
<bindingRedirect oldVersion="0.0.0.0-3.3.1.0" newVersion="3.3.1.0" />
</dependentAssembly>
<dependentAssembly>
<assemblyIdentity name="Common.Logging.Core" publicKeyToken="af08829b84f0328e" />
<bindingRedirect oldVersion="0.0.0.0-3.3.1.0" newVersion="3.3.1.0" />
</dependentAssembly>
<dependentAssembly>
<assemblyIdentity name="Newtonsoft.Json" publicKeyToken="30ad4fe6b2a6aeed" />
<bindingRedirect oldVersion="0.0.0.0-4.5.0.0" newVersion="6.0.0.0" />
</dependentAssembly>
<dependentAssembly>
<assemblyIdentity name="System.Net.Http.Primitives" publicKeyToken="b03f5f7f11d50a3a"
culture="neutral" />
<bindingRedirect oldVersion="1.5.0.0" newVersion="2.2.28.0" />
</dependentAssembly>
```

8. Save your changes.

## 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.



You do not have to re-enable permissions for Refresh Pricing if you already enabled them during a previous update.

### 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 User 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 Double-click and then click **Close**.
6. Double-click and then click **Close**.