Applying Web Model Update 02 for Version 8.3

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor. By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

Publication Information

Release: 8.3.0.02

Publication date: 7/20/2016

Disclaimer

This document reflects the direction Infor may take with regard to the specific product(s) described in this document, all of which is subject to change by Infor in its sole discretion, with or without notice to you. This document is not a commitment to you in any way and you should not rely on this document or any of its content in making any decision. Infor is not committing to develop or deliver any specified enhancement, upgrade, product or functionality, even if such is described in this document.

Contents

Introduction

Infor CRM is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

About this guide

This document describes Web Model Update 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
- 8.3 Web Core Update 02

Do not install Web Model 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.

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

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

Chapter 1
Changes in this Update

1

This chapter lists all of the changes to Infor CRM since version 8.3.

Features added in this update

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

Web Client

- System of record - Enables Infor CRM to function as the authoritative system of record for Opportunities in an integration between Infor CRM and a supported ERP system through Infor ION.

New Features in previous updates

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

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

Web Client

- Added a Test Link button to the Price Service detail view to test the price and availability end points.
- Added logging and exception handling for Price and Availability.
- Enhanced the Account detail view Sales Order tab to include additional information.

See the "What's New in this Release" topic in the online Help systems for more information about the new features.

Issues fixed in this update

Web Model Update 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 - 5975	When you edit an item in a pick list and then click Save & New, the blank "Add item" dialog box should display.
INFORCRM - 6130	If multi currency is enabled, the Sales Order Exchange Rate field does not display the correct rate.
INFORCRM - 8211	When Office Integration is not installed and a user tries to fulfill a literature request the message still says "Saleslogix Desktop Integration".
INFORCRM - 8693	Opportunity Products Adjusted Price is calculated incorrectly in the Infor CRM Web Client.
INFORCRM - 9054	Add "Configurable" to "Lookup Products" and if a product is not configurable and price and availability is configured for the logical ID, then update the products in the products tab with the item price.
INFORCRM - 9696	Price Service OrderLineTotal should refresh after changing the currency code.
INFORCRM - 9788	On the Quote detail view Discount Charges tab, the add (+) button should be removed.
INFORCRM - 9841	Date/Time fields that are exported to file do not use GMT.UTC date rules.
INFORCRM - 9918	When TLS 1.0 is disabled, then programs that utilize the DotNetSDataClient library will receive the error "SalesLogix.SData.Client.Framework.SDataException error: “The underlying connection was closed: An unexpected error occurred on a send.”
INFORCRM - 9958	Cloned Price Services BOD Mappings have a method of "GET" instead of "POST".
INFORCRM-10021	(ICBOE) On the Quote, Sales Order, or Shipment detail view, switching between the Sold To, Bill To, Ship To, or Products tab causes the "You have unsaved data" message to display even though no changes were made.
INFORCRM-10056	(ICBOE) Clicking Get Order Total for quote or sales order with line items should return an error message if the request is rejected.
INFORCRM-10080	Add the pretty key functionality for Opportunity including new AlternateKeyPreffix and AlternateKeySuffix schema and assignment upon record creation.
INFORCRM-10109	The Sales Order detail view Exchange Rate display value should not be rounded.
INFORCRM-10121	Changing the exchange rate for sales order or quotes, the products (line items) should be recalculated with the new exchange rate.
INFORCRM-10131	The Return detail view Ship To tab should include a contact lookup.
INFORCRM-10177	(ICBOE) ERP entities should base values on filter metrics.
INFORCRM-10311	(ICBOE) On the Sales Order detail view the Bill to tab shows the message "We're sorry, you;ve encountered an error. If applicable, please try again."
INFORCRM-10541	(ICBOE) Back Office detail view Price Services tab should be able to sort.
INFORCRM-10715	The Sales Order and Quote snapshot totals should include all products when calculating total values.
INFORCRM-10755	The Return Warehouse relationship join should be based upon the SlxLocationID.

Issues fixed in previous updates

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

Web Model 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-4461	Users added to a custom Library role may not able to see additional Library controls in the Web Client.
INFORCRM-8765	Unable to add products to quote or sales order if the selected back office is different from the Account back office.
INFORCRM-8823	The account Timeline displays incorrectly in the Edge browser.
INFORCRM-8848	When adding products to opportunities the line number does not display.
INFORCRM-8958	The Quote status field should not be read-only.
INFORCRM-8979	(ICBOE) On the Bill To detail view the PaymentTerm and Incoterms picklists storagemode must be CODE, currently, it is set to Text.
INFORCRM-8996	(ICBOE) Adminstrators should be able to disable pricing and availability functionality.
INFORCRM-9000	(ICBOE) Selecting an available warehouse and clicking the OK button on the Available Warehouses lookup should refresh the data on the Products tab.
INFORCRM-9027	(ICBOE) The Quote Item and Sales Order Item currency codes are incorrect.
INFORCRM-9031	(ICBOE) The Account Default Warehouse lookup should display descriptions, not ID values.
INFORCRM-9034	(ICBOE) Product Line deleted in Infor CRM does not create a delete request.
INFORCRM-9035	(ICBOE) The Product list for sales orders and quotes should not include canceled products and therefore needs to filter by the ERP status.
INFORCRM-9044	(ICBOE) The Products tab on the Sales Order and Quote detail view should include a Description column.
INFORCRM-9047	(ICBOE) Sales orders with a status of "Invoiced" should be read-only.
INFORCRM-9058	(ICBOE) Implement Price and Availability service.
INFORCRM-9080	(ICBOE) Add Order Date and Net Order Total columns to the Account detail view Sales Order tab.
INFORCRM-9088	(ICBOE) Add debug log messages to all pricing and availability classes and methods and Handling Exception wherever required.
INFORCRM-9330	(ICBOE) Add a Test Link button to the Price Service detail view to test the price and availability end points.
INFORCRM-9374	(ICBOE) On the Shipments, Invoices, and Receivables detail views the Group List displays the Saleslogix ID instead of External ID.
INFORCRM-9421	(ICBOE) Price Service OrderLineTotal should be updated when Sales Order Items are updated.
INFORCRM-9423	(ICBOE) An incorrect or unresolvable Price and Availability end point URL results in an "Object Reference not set to an object" error message.
INFORCRM-9438	(ICBOE) Updating the quantity in the quote line items does not send a Pricing and Availability request.
INFORCRM-9445	(ICBOE) Deleting a sales order does not behave as expected.
INFORCRM-9448	(ICBOE) When switching between detail view records from the Group List or by using navigation tool bar icons, detail view tool bar icons do not refresh the records have different statuses.

Defect	Description
INFORCRM-9482	(ICBOE) When adding existing non-configurable and sellable products to the Quote or Sales Order detail view, the proper price and availability request to the configured ERP returns the error "Operation failed. Message=Value cannot be null. Parameter name: key. HTTP status: Internal Server Error (500)."
INFORCRM-9494	(ICBOE) The Quote Item SlxLocation ID should be updated based on user selection in the Available Warehouses dialog box.
INFORCRM-9542	The record count should be updated in the detail view if a record is deleted. Currently the records count allows users to navigate to the deleted record which causes an error message to display.
INFORCRM-9584	Deleting multiple products from the Products tab on the Sales Order, Opportunity, or Quote detail view does not delete all of the selected products.
INFORCRM-9587	Merging an account does not move associated quotes.
INFORCRM-9695	(ICBOE) When editing a product quantity, on the Sales Order or Quote detail view, the Extended Price and Total columns should update immediately to reflect updated pricing information.
INFORCRM-9705	(ICBOE) In a Visual integration, the Ship To detail view, Sales orders tab, the Total Orders number is correct, but the associated orders are not listed on the tab.
INFORCRM-9796	(ICBOE) The word "UserTriggered" should be two words.
INFORCRM-9968	The next_url query string parameter used as the location for a redirect response is now being transfered between the pages using session state to address a potential security risk.

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_ Model_ Update_02.zip	ICRM v8.3.0 VFS Web Model Update 02.zip	
ICRM v8.3.0 VFS Web Model Update 02.zip	AccountErpDetails.main.quickform.xml	
	AccountErpDetails.main.quickform.xml.resx	
	AcknowledgeTemplate.main.quickform.xml	
	AcknowledgeTemplate.main.quickform.xml.resx	
	AcknowledgeTemplate.smartpart.xml	
	AcknowledgeTemplate.smartpart.xml.resx	
	AddEditBackOfficeAcctEntity.main.quickform.xml	
	AddEditBackOfficeAcctEntity.main.quickform.xml.resx	
	AddEditBOEPAService.main.quickform.xml	
	AddEditBOEPAService.main.quickform.xml.resx	

File Name	File Contents	File Version
	AddEditPickListItem.ascx.cs	
	BackOffice.BACKOFFICE.entity.xml	
	BackOfficeAcctEntity.BACKOFFICEACCTENTITY.entity.xml	
	BackOfficeBODMappings.main.quickform.xml	
	BackOfficeBODMappings.main.quickform.xml.resx	
	BackOfficeBOEPAService.main.quickform.xml	
	BackOfficeBOEPAService.main.quickform.xml.resx	
	BackOfficeDetails.main.quickform.xml	
	BackOfficeDetails.main.quickform.xml.resx	
	base.master	
	BODMappingDetails.main.quickform.xml	
	BODMappingDetails.main.quickform.xml.resx	
	BOEPAMapping.page.xml	
	BOEPAMapping.page.xml.resx	
	BOEPAMappingDetail.main.quickform.xml	
	BOEPAMappingDetail.main.quickform.xml.resx	
	BOEPAService.BOEPASERVICE.entity.xml	
	BOEPAService.page.xml	
	BOEPAService.page.xml.resx	
	BOEPAServiceBOEPAMapping.main.quickform.xml	
	BOEPAServiceBOEPAMapping.main.quickform.xml.resx	
	BOEPAServiceDetail.main.quickform.xml	
	BOEPAServiceDetail.main.quickform.xml.resx	
	bundleData.xml	
	BusinessRuleActionItem.WebActionRenderingTemplate.vm	
	CalendarOptionsPage.ascx.cs	
	CalendarTasksTasklet.ascx.cs	
	ConfirmationListSummary.html	
	core.master	
	EditOpportunityProduct.main.quickform.xml	
	EditOpportunityProduct.main.quickform.xml.de.resx	
	EditOpportunityProduct.main.quickform.xml.fr.resx	
	EditOpportunityProduct.main.quickform.xml.it.resx	
	EditOpportunityProduct.main.quickform.xml.resx	
	EditOpportunityProduct.main.quickform.xmlru.resx	
	EditOpportunityProduct.main.quickform.xml.zh-CN.resx	
	EditOpportunityProduct.main.quickform.xml.zh-TW.resx	
	EditQuoteItem.main.quickform.xml	
	EditQuoteItem.main.quickform.xml.resx	
	EditSalesOrderItem.main.quickform.xml	
	EditSalesOrderItem.main.quickform.xml.de.resx	

File Name	File Contents	File Version
	EditSalesOrderItem.main.quickform.xml.fr.resx	
	EditSalesOrderItem.main.quickform.xml.it.resx	
	EditSalesOrderItem.main.quickform.xml.resx	
	EditSalesOrderItem.main.quickform.xml.ru.resx	
	EditSalesOrderItem.main.quickform.xml.zh-CN.resx	
	EditSalesOrderItem.main.quickform.xml.zh-TW.resx	
	EditSalesPotential.chkbxOverrideSalesPotential_OnChange_method.xml	
	EditSalesPotential.main.quickform.xml	
	EditSalesPotential.main.quickform.xml.de.resx	
	EditSalesPotential.main.quickform.xml.fr.resx	
	EditSalesPotential.main.quickform.xml.it.resx	
	EditSalesPotential.main.quickform.xml.resx	
	EditSalesPotential.main.quickform.xml.ru.resx	
	EditSalesPotential.main.quickform.xml.zh-CN.resx	
	EditSalesPotential.main.quickform.xml.zh-TW.resx	
	ERPBillTo.ERPBILLTO.entity.xml	
	ERPBillTo.ERPBillToAccount.bb19dc4c48f843bca4b4ada94e4094fb.relationship.xml	
	ERPBillTo.ERPBillToContact.231ffd39564b4386bf1222f719b7d927.relationship.xml	
	ErpBillToDetails.main.quickform.xml	
	ErpBillToDetails.main.quickform.xml.resx	
	ERPInvoice.ERPINVOICE.entity.xml	
	ERPPayFrom.ERPPAYFROM.entity.xml	
	ERPPayFrom.ERPPayFromContact.84716a12bb424a668e4df5ffa81619f8.relationship.xml	
	ErpPayFromDetails.main.quickform.xml	
	ErpPayFromDetails.main.quickform.xml.resx	
	ERPPerson.ERPPERSON.entity.xml	
	ERPReceivable.ERPRECEIVABLE.entity.xml	
	ErpReceivableDiscountChargeItems.main.quickform.xml	
	ErpReceivableDiscountChargeItems.main.quickform.xml.resx	
	ERPSalesOrder.SalesOrder.ERPSALESORDER.entity.xml	
	ERPShipment.ERPSHIPMENT.entity.xml	
	ErpShipmentAddress.main.quickform.xml	
	ErpShipmentAddress.main.quickform.xml.resx	
	ERPShipTo.ERPSHIPTO.entity.xml	
	ERPShipTo.ERPShipToAccount.a560acb295d647f2835b27cb498059cc.relationship.xml	
	ERPShipTo.ERPShipToContact.d05b1b0b79de44e6b740baf049111e79.relationship.xml	
	ERPShipTo.ERPShipToPerson.2c16df8922954d8fbbe9083711fd32c8.relationship.xml	
	ErpShipToDetails.main.quickform.xml	
	ErpShipToDetails.main.quickform.xml.resx	
	ErpShipToSalesOrders.main.quickform.xml	

File Name	File Contents	File Version
	ErpShipToSalesOrders.main.quickform.xml.resx	
	File.js	
	GeneralSearchOptionsPage.ascx	
	GeneralSearchOptionsPage.ascx.resx	
	Global.asax	
	Global.cs	
	GroupLayout.resx	
	InsertBODMapping.main.quickform.xml	
	InsertBODMapping.main.quickform.xml.resx	
	InsertQuote.btnAddNewAccount_OnClick.method.xml	
	InsertQuote.main.quickform.xml	
	InsertQuote.main.quickform.xml.resx	
	InsertQuote.OnLoad1.method.xml	
	InsertSalesOrder.btnAddNewAccount_OnClick.method.xml	
	InsertSalesOrder.main.quickform.xml	
	InsertSalesOrder.main.quickform.xml.de.resx	
	InsertSalesOrder.main.quickform.xml.fr.resx	
	InsertSalesOrder.main.quickform.xml.it.resx	
	InsertSalesOrder.main.quickform.xml.it.resx	
	InsertSalesOrder.main.quickform.xml.ru.resx	
	InsertSalesOrder.main.quickform.xml.zh-CN.resx	
	InsertSalesOrder.main.quickform.xml.zh-TW.resx	
	InsertSalesOrder.OnLoad1.method.xml	
	IntegrationConfigGroup.main.quickform.xml	
	IntegrationConfigGroup.main.quickform.xml.resx	
	LiteratureManagementTasks.js	
	Login.aspx	
	manifest.xml	
	OnBeforeDelete.method.xml	
	OnBeforeErpStatusChanged.method.xml	
	OnBeforeInsert.method.xml	
	OnBeforeUpdate.method.xml	
	OpportunityErpDetails.main.quickform.xml	
	OpportunityErpDetails.main.quickform.xml.resx	
	OpportunityProduct.OPPORTUNITY_PRODUCT.entity.xml	
	OpportunityProduct.UnitOfMeasure.556f3763d3e648deb5be56021c443724.relationship.xml	
	OpportunityProducts.main.quickform.xml	
	OpportunityProducts.main.quickform.xml.de.resx	
	OpportunityProducts.main.quickform.xml.fr.resx	
	OpportunityProducts.main.quickform.xml.it.resx	
	OpportunityProducts.main.quickform.xml.resx	

File Name	File Contents	File Version
	OpportunityProducts.main.quickform.xml.ru.resx	
	OpportunityProducts.main.quickform.xml.zh-CN.resx	
	OpportunityProducts.main.quickform.xml.zh-TW.resx	
	OpportunitySalesProcess.ascx.resx	
	OpportunitySnapShot.ascx	
	OpportunitySnapShot.ascx.resx	
	OutboundTemplate.main.quickform.xml	
	OutboundTemplate.main.quickform.xml.resx	
	OutboundTemplate.smartpart.xml	
	OutboundTemplate.smartpart.xml.resx	
	ProdPackageKitView.PRODPACKAGEKITVIEW.entity.xml	
	ProdPackageKitView.UnitOfMeasure.21298081b89f46b19f4abc32412e0831.relationship.xml	
	QFDataGrid.WebControlRenderingTemplate.vm	
	Quote.QUOTE.entity.xml	
	QuoteAddEditDiscountChargeItem.main.quickform.xml	
	QuoteAddEditDiscountChargeItem.main.quickform.xml.resx	
	QuoteAddEditDiscountChargeItem.smartpart.xml	
	QuoteAddEditDiscountChargeItem.smartpart.xml.resx	
	QuoteAddEditDistributedTax.main.quickform.xml	
	QuoteAddEditDistributedTax.main.quickform.xml.resx	
	QuoteBillTo.main.quickform.xml	
	QuoteBillTo.main.quickform.xml.resx	
	QuoteDiscountChargeItems.main.quickform.xml	
	QuoteDiscountChargeItems.main.quickform.xml.resx	
	QuoteErpDetails.main.quickform.xml	
	QuoteErpDetails.main.quickform.xml.resx	
	QuoteItem.QUOTEITEM.entity.xml	
	QuoteProducts.main.quickform.xml	
	QuoteProducts.main.quickform.xml.resx	
	QuoteShipTo.main.quickform.xml	
	QuoteShipTo.main.quickform.xml.resx	
	QuoteSnapshot.ascx.cs	
	QuoteSoldTo.main.quickform.xml	
	QuoteSoldTo.main.quickform.xml.resx	
	RequestItemPriceService.method.xml	
	Return.RMA.entity.xml	
	ReturnShipToDetail.main.quickform.xml	
	ReturnShipToDetail.main.quickform.xml.de.resx	
	ReturnShipToDetail.main.quickform.xml.fr.resx	

File Name	File Contents	File Version
	ReturnShipToDetail.main.quickform.xml.it.resx	
	ReturnShipToDetail.main.quickform.xml.resx	
	ReturnShipToDetail.main.quickform.xml.ru.resx	
	ReturnShipToDetail.main.quickform.xml.zh-CN.resx	
	ReturnShipToDetail.main.quickform.xml.zh-TW.resx	
	RoleDetails.main.quickform.xml	
	RoleDetails.main.quickform.xml.de.resx	
	RoleDetails.main.quickform.xml.fr.resx	
	RoleDetails.main.quickform.xml.it.resx	
	RoleDetails.main.quickform.xml.resx	
	RoleDetails.main.quickform.xml.ru.resx	
	RoleDetails.main.quickform.xml.zh-CN.resx	
	RoleDetails.main.quickform.xml.zh-TW.resx	
	RoleDetails.OnLoadRoleDetails.method.xml	
	RoleUsers.main.quickform.xml	
	RoleUsers.main.quickform.xml.de.resx	
	RoleUsers.main.quickform.xml.fr.resx	
	RoleUsers.main.quickform.xml.it.resx	
	RoleUsers.main.quickform.xml.resx	
	RoleUsers.main.quickform.xml.ru.resx	
	RoleUsers.main.quickform.xml.zh-CN.resx	
	RoleUsers.main.quickform.xml.zh-TW.resx	
	Sage.Platform.Scheduling.DelegateSystemJob.job.xml	
	Sage.Platform.Scheduling.DelegateUserJob.job.xml	
	Sage.SalesLogix.Client.MailMerge.dll	
	Sage.SnippetLibrary.CSharp.@.2aeba966-e549-4880-8d72-cd34282dea02.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.03ece52b-ed84-472f-acc0-1c9e6f421871.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.5c9de628-c88e-4893-8c52-1a877f68a1e6.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.6ca31f10-e98e-4c8c-9b1e-1a9e02633d36.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.629d230d-5e07-425f-b494-cf424afbd6fa.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.a208a60c-1b62-4026-9b4e-8cdb57973919.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.d938e19f-dde6-479b-851e-32a09546fe09.codesnippet.cs	
	SalesOrder.DiscountChargeItem.cfefb2a763be4b5c9221639464bb0d0f.relationship.xml	
	SalesOrder.DiscountChargeItem.f186a7e7179e467c81a0949b9326d0d3.relationship.xml	
	SalesOrderBillTo.main.quickform.xml	
	SalesOrderBillTo.main.quickform.xml.resx	
	SalesOrderDiscountChargeItems.main.quickform.xml	
	SalesOrderDiscountChargeItems.main.quickform.xml.resx	
	SalesOrderDistributedTaxes.main.quickform.xml	
	SalesOrderDistributedTaxes.main.quickform.xml.resx	

File Name	File Contents	File Version
	SalesOrderDistributedTaxes.smartpart.xml	
	SalesOrderDistributedTaxes.smartpart.xml.resx	
	SalesOrderErpDetails.main.quickform.xml	
	SalesOrderErpDetails.main.quickform.xml.resx	
	SalesOrderItem.DiscountChargeItem.732e84f7bbbf4b908e80b5f205ac43cf.relationship.xml	
	SalesOrderItem.DiscountChargeItem.dc0adb1b94d1468d87fd8ad985dd7a2b.relationship.xml	
	SalesOrderItem.SALESORDERITEMS.entity.xml	
	SalesOrderPayFrom.main.quickform.xml	
	SalesOrderPayFrom.main.quickform.xml.resx	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.de.resx	
	SalesOrderProducts.main.quickform.xml.fr.resx	
	SalesOrderProducts.main.quickform.xml.it.resx	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.main.quickform.xml.ru.resx	
	SalesOrderProducts.main.quickform.xml.zh-CN.resx	
	SalesOrderProducts.main.quickform.xml.zh-TW.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	
	SalesOrderShipTo.main.quickform.xml	
	SalesOrderShipTo.main.quickform.xml.resx	
	SalesOrderSnapShot.ascx.cs	
	SalesOrderSoldTo.main.quickform.xml	
	SalesOrderSoldTo.main.quickform.xml.resx	
	ScheduleCompleteActivity.ascx.cs	
	SOAddEditDiscountChargeItem.main.quickform.xml	
	SOAddEditDiscountChargeItem.main.quickform.xml.resx	
	SOAddEditDiscountChargeItem.smartpart.xml	
	SOAddEditDiscountChargeItem.smartpart.xml.resx	
	SOAddEditDistributedTax.main.quickform.xml	
	SOAddEditDistributedTax.main.quickform.xml.resx	
	SOAddEditDistributedTax.smartpart.xml	
	SOAddEditDistributedTax.smartpart.xml.resx	
	SumExtendedCost.filter.xml	
	SumGrandTotal.filter.xml	
	SumTotalAmount.filter.xml	
	SyncResultsHistory.smartpart.xml	
	SyncResultsHistory.smartpart.xml.resx	
	SyncTemplate.main.quickform.xml	
	SyncTemplate.main.quickform.xml.resx	
	SyncTemplate.smartpart.xml	

File Name	File Contents	File Version
	SyncTemplate.smartpart.xml.resx	
	timeline-bundle.css	
	UserRoles.main.quickform.xml	
	UserRoles.main.quickform.xml.de.resx	
	UserRoles.main.quickform.xml.fr.resx	
	UserRoles.main.quickform.xml.it.resx	
	UserRoles.main.quickform.xml.resx	
	UserRoles.main.quickform.xml.ru.resx	
	UserRoles.main.quickform.xml.zh-CN.resx	
	UserRoles.main.quickform.xml.zh-TW.resx	
	ValidateBOEPAService.method.xml	
	ValidatePriceItems.method.xml	
	WinAuthLoad.aspx.cs	

Chapter 2
Applying the Update

2

This Web Model Update affects the following portals:

- Web Client
- Offline Web Client
- Customer Portal

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

Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

To install the bundles

1. Extract the contents of the **Infor_CRM_v830_Web_Model_Update_02.zip** file to a temporary folder.
2. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
3. Open the **Application Architect**.
4. On the **View** menu, click **Bundle Manager**.
5. Click **Install**.
6. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.3.0 VFS Web Model Update 02.zip**, and then click **Open**.
7. On the **Select Bundle** screen, click **Next**.

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

8. On the **Select Items** screen, ensure the **Portals** option is selected.
9. Click **Next**, and then click **Finish**.

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.

Infor CRM Back Office Extension (ICBOE) installations

If your installation includes Infor CRM Back Office Extension, you must upgrade the BOD Pack for your ERP system to version 8.3.0.2. For more information, and to download the BOD Packs, see KB 1842032, available from Infor Xtreme www.inforxtreme.com.

Configuring Price and Availability

If your Infor CRM installation includes the Back Office Extension feature, the following steps are required to configure Price and Availability.

Modifying the content of the Location field

Modify the content of the Location field using information provided by the administrator for your supported ERP system.

This is typically the Warehouse ID, Office ID, or Site ID as defined in the ERP system. This field is only used in publishing new transactions.

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration**, **Integrations**.
3. Click **Back Office Extension**.
4. In the **Back Office Extension** detail view, click the **Back Offices** tab.
5. Click to select your Back Office.

6. In the **Back Office Detail** view, in the **Accounting Entities** tab, click **Edit**.
7. In the **Location** box, type the **Location** information provided by your ERP system administrator.

Adding the End Point URL for the Back Office Price Services

For the Back Office Price services to communicate correctly with the ERP, you must add the unique End Point URL for each Back Office Price service supported by your ERP. Contact your ERP Administrator for these Back Office URL.

Some back offices also require a user name and password. Your ERP Administrator can also provide this information.

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration, Integrations**.
3. Click **Back Office Extension**.
4. In the **Back Office Extension** detail view, click the **Back Offices** tab.
5. Click to select your Back Office.
6. In the **Back Office Detail** view, in the **Price Services** tab, select the Price Service you want to edit.
7. In the **Price Service Detail** view, in the **End Point** field, copy and paste the End Point URL that matches the Price Service in the ERP.
   This is the End Point URL provided by your ERP Administrator.
8. If necessary, enter the **User name** and **Password**.
   This is the User name and Password provided by your ERP Administrator
9. Repeat steps **6** and **7** for each Price Service listed for your ERP.

Update the ION Connection Point and Document Flows

ProcessQuote and ProcessSalesOrders must be added to the ION Connection Point and Document flow to the host ERP system to receive this information from Infor CRM.

For instructions on updating ION Connection points and Document flows, see the Infor CRM BOE Customization Guide.pdf. This document is available in your Infor CRM v8.3 installation media, or from Infor Xtreme at www.inforxtreme.com.

Confirm necessary BOD Mapping Outbound triggers are enabled

These triggers must be enabled on any entity that is bi-directional, for CRM to publish BODs to your host ERP system. The default setting on entities that are not bidirectional is off.

See the Systems Integration Guide for your ERP for a full list of required triggers

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration**, **Integrations**.
3. Click **Back Office Extension**.
4. In the **Back Office Extension** detail view, click the **Back Offices** tab.
5. Click to select your Back Office.

6. In the **Back Office Detail** view, in the **BOD Mappings** tab, review the settings in the following columns for each mapping:
   a. Outbound on Create
      Enables creating new records in CRM and promoting them to the host system.
   b. Outbound on Update
      Enables modifying promoted records and publishing changes to the host system.
   c. Outbound on Delete (optional)
      Enables the Delete button on the Detail view tabs, which enables users to delete Product lines in Quotes and Sales Orders. Note that it also enables the Delete button on the Detail view, which enables users to delete the entire Sales Order or Quote.
7. If the settings do not match the settings specified in Systems Integration Guide for your ERP, select the Mapping to open the BOD Mapping Detail view and edit the setting using the pick list for each trigger.

Enabling System of Record

Infor CRM Web Model Update 02 for v8.3 adds the ability to enable Infor CRM as the System of Record. If your installation includes an integration with a supported ERP system and you want to enable Infor CRM as the System of Record, you must enable the feature. System of Record is disabled by default.

These instructions assume that Infor CRM Back Office Extension is already configured in your environment. This includes configuration with Infor ION and a supported ERP system.

To enable

1. Sign into the **Infor CRM Web Client**as the **Administrator.**
2. On the **Integrations** List view, click **Back Office Extension**, and click the **Options** tab.
3. Set the **Tenant** and the **Logical ID**.
   The Tenant and the Logical ID fields contain the same values as those used in the Infor ION Connection point defined for Infor CRM. If you do not have these values, contact your ION Administrator.
4. Click **Save**.
5. While still in the **Back Office Extension** Detail view, click the **Back Offices** tab.
6. In the grid, locate and click **InforCRM SOR**.
7. In the **Back Office - InforCRM SOR** Detail view, set the **Logical ID**.
   This is the Infor CRM Logical ID and is the same value used to set the Logical ID in step 3 above.
8. Select the **Active** check box and then click **Save**.

You must now provide the appropriate users with permissions to Promote Opportunity records from Infor CRM.

Enabling Permissions for Promote

When Infor CRM is enabled as system of record, users with appropriate permissions will have the ability to promote selected record types to the ERP system. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Promote feature will not be available to users who have not been assigned permissions.

To assign Promote 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 **Entities/Promote**.
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**.