Infor CRM v8.5 Release Notes

Publication Information

Release: 8.5

Publication date: 2/24/2021

Contents

Introduction ... 1

About This Guide ... 1

Prerequisites ... 2

Related Documentation ... 2

Contacting Infor ... 3

Chapter 1 Upgrade workplan ... 1

Preparing to upgrade ... 1

Protecting your customizations ... 3

Preparing your Infor CRM database ... 6

Upgrading your core components ... 7

Re-applying your customizations ... 19

Upgrading synchronization ... 21

Upgrading Clients and Remote Offices ... 22

Upgrading Web Clients ... 22

Upgrading Network Clients ... 23

Upgrading Mobile Clients ... 23

Upgrading Remote Users and Offices ... 24

Additional Web Client upgrade tasks ... 32

Configuring Optional Features ... 33

Upgrading Infor CRM Xbar for Microsoft Outlook ... 33

Upgrading Infor CRM Back Office Extension ... 35

Enabling integration with Infor Configure Price Quote (CPQ) ... 41

Enabling integration with Infor Ming.le ... 42

Next Steps ... 43

Chapter 2 What's New in this release ... 45

General enhancements ... 45

Web Client enhancements ... 46

Web Client Administrator enhancements ... 48

Back Office Integration enhancements ... 49

Ming.le enhancements ... 50

Windows Client enhancements ... 50

Mobile enhancements ... 50

Application Architect enhancements ... 51

Deprecated Features ... 51

Chapter 3 Changes in this release ... 53

Finding script changes ... 53

New Entities ... 54

Updated Entities 54

New or Updated Properties or Fields 55

New or Updated Relationships 62

New or Updated Views 69

Tables with no Corresponding Entity in the Entity Model 72

Inserted Records 72

New or Updated Scripts 73

New or Updated Filters 74

Create Indexes 75

New or Updated Events 76

New or Updated Business Rules 78

New or Updated Database Objects – .sxb bundle 79

New or Updated Database Objects – VFS bundle 79

New or Updated Plugins 83

New or Updated Reports 84

New or Updated Picklists 85

New or Updated Windows Forms 85

New or Updated Portal Pages 86

New or Updated Quick Forms 91

New or Updated Smart Parts 91

New or Updated Modules 93

New or Updated Menus 93

New or Updated Navigation 94

New or Updated Context Menus 94

New or Updated Tasklets 94

Updated Configuration Files 94

New or Updated Custom Settings 95

New or Updated Roles 97

Updated or New Secured Actions 98

Deprecated Items 100

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, Accounting Integration, and Support automation solutions.

About This Guide

This document provides instructions for upgrading existing installations from Infor CRM version 8.4 or later to version 8.5.

Version 8.5 will uninstall earlier versions of Infor CRM before installing version 8.5.

If you are upgrading from Infor CRM version 8.4 or later, follow the steps in this guide.

If you have never installed a version of Infor CRM, do not use this guide. Refer to the instructions in the *Infor CRM Implementation Guide* document provided with this release.

If you are upgrading from a version of Infor CRM or Saleslogix prior to version 8.4, you must first upgrade to version 8.4 or later before upgrading to version 8.5. Use the upgrade instructions in the appropriate upgrade documents on the support portal web site: Infor Concierge at https://concierge.infor.com/

DO NOT install this release on any Infor CRM version earlier than 8.4.

Prerequisites

The following table shows software prerequisites that will automatically be installed on your computer if they are not already installed. Installing these prerequisites may require your computer to restart.

1. For additional prerequisite compatibility information for Infor CRM v8.5 is available in the Infor Online Compatibility Matrix (OCM).
2. Log on to the Infor Support Portal web site: https://concierge.infor.com/.
3. Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
   Click Help for a video explaining the features of the OCM.

Performing upgrade installations using the install scripts do not install prerequisites. You must manually install prerequisites on each machine to be upgraded before running the install scripts.

Prerequisites	Admin Tools and Servers	Windows Client	Remote Office	Remote Client	Offline Web Client	Web Host
Windows Installer 4.5.1	X		X	X	X	
Microsoft Exception Message Box	X		X	X		
Microsoft .NET Framework 4.8	X		X	X	X	X
Microsoft .NET Framework 4.8 Developer Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server Express 2012 RTM (Optional)[1]	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X

[1] If a version of the Microsoft SQL Server database is already installed, the Microsoft SQL Express, installation will not complete successfully. Decline the option to install if it is offered.

Related Documentation

In addition to this document, you may find the following documentation helpful.

- Compatibility information for Infor CRM v8.5 is available in the Infor Online Compatibility Matrix (OCM) available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/. See "Prerequisites" on page 2 for instructions.
- The *Developer Tips* online Help contains information for developers, Webmasters, and IS professionals who are customizing the Infor CRM Web Client or creating custom Web applications. This help file contains conceptual overviews, customization scenarios, code samples, and references to help you develop your Web applications. The Developer Tips Help is available from the Application Architect help system.
- The *Infor CRM Back Office Extension Configuration Guide for ION* provides configuration and implementation information for integrating Infor CRM Back Office Extension functionality with Infor ION. This document describes

configuration requirements and provides setup instructions. It describes the ION connection points that are used in the integration and provides information about the business events or user actions in Infor CRM that send Business Object Documents (BODs) to ION Connect. This document is available with the product media and from the Infor Support Portal on the Infor Concierge web site: https://concierge.infor.com/.

- The *Infor CRM Back Office Extension Customization Guide* provides instructions for customizing the Infor CRM v8.5.x Back Office Extension functionality to integrate with your ERP system when using Infor ION Connect. This document is available with the product media and from the Infor Support Portal web site: https://concierge.infor.com/.
- The *LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize the Infor CRM Windows (LAN) Client to meet your specific needs. It is available from the Infor Support Portal web site: https://concierge.infor.com/.
- Online Help is available in each Infor CRM application.
- The Infor CRM Web Client online help is available from https://docs.infor.com/en-us/crm/8.5.x

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search** > **Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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

Chapter 1
Upgrade workplan

1

Use the following workplan to guide your upgrade. Follow the tasks in order. If a task does not apply, disregard it and move on to the next. The “Required for” column indicates you must complete the task for:

- **All** - all Infor CRM installations.
- **Web** - installations that include Web components.
- **Mobile** - installations that include the Mobile client.
- **Network** - installations that include Network components.
- **Remotes** - installations that include Remote users or Remote Offices.
- **Customized** - installations that have customized their Infor CRM environment.
- **Oracle** - installations running Infor CRM on an Oracle database.
- **Microsoft SQL Server** - installations running Infor CRM on a Microsoft SQL Server database.
- **Outlook Sync** - Installations that include Outlook Sync
- **Infor CRM Back Office Extension** - Installations that are integrated with an ERP system using the Back Office Extension features.

- Sync for Exchange 1.0.2 and Sync for Gmail 1.2 are compatible with Infor CRM 8.5 or later. Please install the latest version available after upgrading to Infor CRM 8.5. No other versions of Sync for Exchange or Sync for Gmail are compatible with Infor CRM 8.5 or later.
- Outlook Integration functionality is delivered with Infor CRM Xbar. The Infor CRM Xbar v1.4.1 installation is provided on the 8.5 media.

Preparing to upgrade

You are instructed to build and deploy your Web site at the end of multiple tasks during this upgrade. While experienced installers may choose to ignore this instruction and build and deploy only once, incremental builds are strongly recommended as they help with troubleshooting in the event that the Infor CRM Web Client does not deploy as expected.

Infor CRM is highly customizable. While every effort is made to identify breaking changes, validating your customizations after upgrading is strongly recommended.

Required for	Task	Description

All	**1**	**Read the Infor CRM v8.5 Release Notes**
		Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.
		- Chapter 1, “Upgrade ‘Workplan” - contains upgrade tasks explaining how to:
		  - Save your existing customizations
		  - Prepare your database
		  - Upgrade the core Infor CRM components
		  - Re-apply customizations to your upgraded installation
		  - Cut new remote remote databases
		  - Upgrade your clients (Web, Mobile, Network, Offline, Remote)
		  - Enable new features added in version 8.5
		  - Upgrade Back Office Extension.
		  - Upgrade existing integrations such as Infor CRM Xbar for Microsoft Outlook.
		- Chapter 2, "What's New in this release" - details the new features, functionality changes, and enhancements in this release. Any change that impacts customizations is identified as a [Breaking Change].
		- Chapter 3, "Changes in this release" - details the schema, plugin, and file changes in this release.
		Before upgrading, ensure that:
		- Your current Infor CRM version is 8.4 or later and Web portals included in your installation are version 8.4 or later and have deployed successfully.
		- You review the Online Compatibility Matrix (OCM) to understand the supported platforms, applications, and system requirements for this release.

All	**2**	**Test environment** Install this release in a test environment before installing on your production database. Create a test environment to review new features and for use after upgrading your production environment. If your installation includes customizations, you can use the test environment to compare your customizations with your upgraded production environment. Refer to the support portal web site: Infor Concierge at https://concierge.infor.com/ for more information. Search for “How to set up an Infor CRM test environment” for information on using a copy of your production database in a test environment. **Note**: Make sure you change your logging paths in the Administrator to access the test environment or errors will occur.
All	**3**	**Admin rights** Grant admin rights to the person installing the upgrade. Offline (disconnected) Web Client users can upgrade without admin rights on their machines. Other users require admin rights when installing Infor CRM.

Required for	Task	Description
Web	**4**	**Cache Server requirements** Open Windows Firewall and add an exclusion for port 11211. The Cache Server requires access to this port. The Cache Server is used to speed processing of the Web Client by providing storage for cached information. The Cache Server can be installed on any server, however, avoid installing it on a high-activity machine such as the SpeedSearch Server. Do not install multiple instances of the Cache Server in your environment.

Protecting your customizations

Complete these tasks if your existing environment includes customizations to the Windows, Web, and/or Mobile clients. If your existing environment does not include any customizations, proceed to task number 14 in "Preparing your Infor CRM database"

Required for	Task	Description
Customized Network and Customized Web	**5**	**Back up custom assemblies** Back up all custom assemblies to protect any changes. Custom assemblies may be overwritten or deleted during the installation.
Customized Web	**6**	**Document Config File Customizations** Document or save any customizations made in the web.config or app.config files. Before you upgrade, use the Application Architect to note customizations in all web.config and app.config files. Use the steps in task number 45 under "Re-applying your customizations" to apply the changes after the upgrade.
Customized Web	**7**	**Dashboard customizations** Document any customizations made to Dashboards. Any custom Dashboards will need to be recreated after the upgrade. You will recreate the custom Dashboards in task number 44 under "Re-applying your customizations".
Customized Web without Updates	**8**	**Web customizations v8.4** Prepare to create a bundle of your Web customizations. **Note**: If you have not customized your Web implementation, disregard this task. If you customized your Web implementation and have Updates installed, proceed to task number 9. Infor CRM provides project backups that you can use to compare to your current database. You can then create a bundle from the differences. **To prepare** 1. Locate the **ICRM v8.4.0 Project_Backup.zip** The project backup files are included in the Upgrades folder in the media / download files. 2. Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 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). 3. In the Application Architect Project Explorer, open your current project.

Required for	Task	Description
		4. If necessary, open the Output Window to display progress when creating your customization bundle. **Note:**In the Project Explorer tree view do not expand nodes unnecessarily. Some nodes, such as the Portal Page Templates node, will autocreate items that may be included in your customization bundle. 5. Proceed to task number 10.
Customized Web with Updates	**9**	**Web customizations v8.4.0.01 or higher** Identify customized forms on your system and create a bundle of your Web customizations. Create a new project workspace and add the Updates currently installed on your system. **Note**: If you have not customized your Web implementation or already have an accurate record of your customizations, disregard this task and proceed to task number 13. If you customized your Web implementation, but do not have any Updates installed, go back to task number 8. To determine if an Update has been installed, view your system bundles: ▪ For network bundles, open the **Administrator**, and then click **Bundles**. ▪ For Web bundles, open the **Application Architect,** open **Project Explorer**, expand the **VFS project workspace**, and then expand **Bundle Model**. After creating a new project workspace, restore the project backup into the workspace, and apply your Updates. **To create a new project workspace** 1. On the Application Architect **View** menu, click **Project Workspace Manager**. 2. Right-click in the **Project Workspaces** window, and then click **Add**. 3. In the **Name** box, type a name for the project workspace. 4. In the **Working Path** box, type or browse to the location where you want to save the new project workspace. The Source Path is automatically set to the working source location. 5. In the **Description** box, type a description or additional information about the new project. 6. Ensure the **Export Files Upon Creation** check box is not selected. 7. Click **Create**. 8. Locate the **ICRM v8.4.0 Project_Backup.zip**. The project backup files are included in the Upgrades folder in the 8.5 media or download files. 9. Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 10. In the Application Architect, Project Explorer, open the project workspace you created in step 2, right-click the project, and then click **Restore Project**. 11. In the **Select Project Backup File to Restore From** dialog box, browse to the project backup on your local machine (step 9). 12. Apply all Web Updates currently installed in your production environment to the new project.
Customized Web	**10**	**Create a bundle of your Web customizations** **Note**: If you have not customized your Web implementation, disregard this task and proceed to task number 14 under "Preparing your Infor CRM database".

Required for	Task	Description
		To create 1. In Application Architect, open Project Explorer. 2. Right-click **Bundle Model**, and then click **Create Manifest by Project Differences**. The Select a Project to Compare Against dialog box opens. 3. Choose one of the following: ■ If your custom installation does not include Updates, select **Project Backup** and browse to the project backup you created in task number 8 ■ If your custom installation includes Updates, select **Existing Project**, and then select the project you created in task number 9. 4. Clear the **Include deleted items that were added to the current project** check box. Clearing this check box ensures that items in the project's Recycle Bin are not included in the customization bundle as delete items. 5. Click **OK**. The new manifest opens in the Application Architect. 6. On the New Manifest **Properties** tab, type a name in the **Name** box. For example, Customizations. 7. Save the manifest. 8. Expand **Bundle Model**, right-click the new manifest, and then click **Create Bundle**. 9. In the **Save Bundle** dialog box, browse to the location where you want to save the bundle, type a name, and then click **Save**. You will use this bundle in task number 42 under "Re-applying your customizations". **Note**: The bundle cannot be saved to a network drive. Save the bundle to a local drive or map the drive and save without using a UNC path.
Customized Infor CRM Mobile	**11**	**Mobile customizations** Save any customizations made to **Infor CRM Mobile**. Before deleting the existing Mobile portal, you must save any changes you have made directly in the portal SupportFiles to a bundle or onto your local file system. This includes changes to out-of-the-box views or classes, any views or JavaScript files you have added, or any changes to configuration or content. Failure to save these changes will cause them to be lost when you delete the portal.
Customized Network	**12**	**Network Client customizations** Record your Network Client customizations and use the Architect to create a bundle of all customized plugins in your database. See the "Working with Bundles" topic in the Architect Help for instructions. Infor CRM does not overwrite your customized plugins. However, this bundle can be used as a backup of your customizations.
Customized Network	**13**	**Network client review plugin changes** Review the Infor CRM plugin changes to determine if you have customized any plugins that are updated in this release. Review Chapter 3, "Changes in this release" for all plugin changes. After reviewing plugin changes, determine if you are going to add your customizations to the plugins in this release (recommended) or add the Infor CRM changes to your custom plugins.

Preparing your Infor CRM database

These tasks are required to prepare your database for a successful upgrade

Required for	Task	Description
Microsoft SQL Server	**14**	**Remove replication** If you are using Microsoft SQL Server and have published your database for replication, remove replication. Remember to reset replication after your upgrade is complete. **Note**: Merge and Snapshot Replication are not compatible with Infor CRM.
All	**15**	**Run Integrity Checker** Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in the Administrator. See the “Integrity Checker” topic in the Administrator Help for instructions. If you are running the Integrity Checker on a database that is not located on the same network as the CRM Library and attachments, clear the Attachment and Library tests before you repair the database.
All	**16**	**Ensure all users sign off** Make sure all users have signed off from Infor CRM.
Remotes	**17**	**Final synchronization cycle (Remotes)** Instruct all Remote users and Offices to run a final synchronization cycle. **Note**: Once the Main office is upgraded, remote users will still be able to synchronize changes to the host but will not be able to receive any changes until they have upgraded.
Remotes	**18**	**Final synchronization cycle (Sync Server)** Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.
Remotes	**19**	**Stop the Sync Service(s)** If using a third-party scheduling package, deactivate the Synchronization Server tasks.
All	**20**	**Close and stop Infor CRM applications and services** Close all Infor CRM applications and stop all applications and services that access the Infor CRM database using the Infor CRM OLE DB Provider. Having services running during installation can impede the installation process and generate errors.
All	**21**	**Back up production database** Back up your production database. Verify the backup is successful and complete. You may also want to create a backup at various points in the upgrade process. For example, after running the patch but before installing bundles. Then, if you need to revert your installation, you can choose a backup created during the upgrade without having to start from the beginning.

Upgrading your core components

These tasks detail upgrading your Application Architect, Administrator, Architect, and Web Host, as well as installing necessary bundles and building and deploying required portals.

Required for	Task	Description
Network only using Microsoft Outlook Infor CRM Address Book	**22**	**Install the Web Host and build and deploy SData portal and client** Infor CRM implementations that are Windows Client-only (no Web) and use the Infor CRM (SLX) Address Book, Insert VCard, Insert Contact Card, and Insert Library Doc features in Microsoft Outlook must install the Web Host and build and deploy the SData portal and client to continue to use those features in v8.5. Refer to Chapter 5 Installing the Web Components in the *Infor CRM Implementation Guide* for instructions.
Infor CRM Xbar which includes Outlook Sync	**23**	**Installing Infor CRM Xbar which includes Outlook Sync** If your implementation is LAN only, and you will be adding Infor CRM Xbar for Microsoft Outlook to your implementation, you must deploy a SData portal. If your installation is: ■ **Windows Network Client** only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals. ■ **Windows Remote Client**: no extra actions required. The SDataportal is deployed as part of the LAN Remote Client install.
All	**24**	**Upgrade main office computer** Upgrade your main office computers using the Administrative Tools and Servers installation. This includes the Administrative Workstation, Synchronisation Server, SpeedSearch Server, and Job Server. **Note**: The installation creates folders and applies permissions necessary for Infor CRM to function. To avoid unexpected results, we recommend contacting Infor CRM Technical Support or your Business Partner before changing default settings on these folders. The Administrative Tools and Servers installation allows you to select one or multiple applications to install on the same computer. The installations remove only the applications with a prior version and then install ONLY the applications for the installation that you selected. For example, if you have the Administrator, Architect, and Infor CRM Client on your Administrative Workstation computer and you run the Administrative Tools and Servers install, only the Administrator and Architect will be removed and reinstalled. To upgrade the Sales Client, you must then run the Network Client install at which point only the Infor CRM Client will be removed and reinstalled. **Important:** ■ The Job Service is required for Web Client functionality. ■ If your installation is Windows-only and has been using the SLX Address Book (now rebranded to Infor CRM Address Book) and related features in Microsoft Outlook, complete task number 22 before proceeding with this task. ■ If your installation includes Remote users or Remote Offices, you must upgrade your Synchronization Server(s). ■ If your implementation includes Outlook Sync, read task number 23 before proceeding with this task. **To upgrade** 1. Infor CRM media> **Server Installation** > **Required Administrative Tools and**

Required for	Task	Description
		Servers. 2. If the Open File - Security Warning dialog appears, click **Run**. 3. If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart. ■ Click **Next** to continue with the installation. ■ Click **Cancel** to exit the Administrative Tools and Servers installation. 4. For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. If a message box offering to install an optional prerequisite (such as Microsoft SQL Server 2012 Express SP1) opens, do one of the following ■ Click **Yes** to install the referenced software. ■ Click **No** to cancel installation of the prerequisite, but continue to install Infor CRM. 5. On the **Welcome** screen, click **Next**. 6. On the **Setup Type** screen, select an installation type. ■ Select **Complete** to install all program features and the Microsoft SQL Server databases. Selecting this option installs Infor CRM using the Local System Account. To set a different user, particularly if SpeedSearch indexes include files located on another computer, select the Custom option. ■ Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. • **Saleslogix Server -** installs the components that primarily handle logging and licensing for Infor CRM. This is required for all installations. • **Administrator -** installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses. • **Architect -** installs the component used to customize the Infor CRM Client. • **Application Architect** - required to configure and customize the Infor CRM Web components and portals. • **Job Service** - installs the service used for scheduling tasks for immediate or delayed execution. You must install this service if your implementation includes any type of Infor CRM Client because it is required for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel. • **Messaging Server** - enables communication between Infor CRM service components. This is required for all installations. • **Cache Server** - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do not install on the SpeedSearch Server, and be sure to install only once per implementation. • **SpeedSearch Server -** installs the SpeedSearch Service. • **Synchronization Server** - required if your installation will include

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
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remote users or a remote office.
• .NET Extensions - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework.
• Utilities - multiple applications to aid with customization and database maintenance.
7. Click Next.
8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
▪ SQL Server sa password - If you have a password set on the sa account on the SQL Server, type the sa password. The installation requires this password to install and attach the Infor CRM databases.
▪ SQL Server sysdba password - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Infor CRM database.
▪ Use Local System Account - Select this option if the local user account has the correct security permissions to install Infor CRM.
If you clear this option, set the information for the Infor CRM Service user.
▪ Domain - Type the network domain where you created the Infor Service user.
▪ User Name - Type the name of the Infor Service user (for example, SLXService).
▪ Password and Confirm - Type the Infor Service user’s password.
▪ Port Change button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.
9. On the remaining screens, click Install and Finish to complete the installation.
Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.
10. If prompted, restart your computer when the installation completes.
</td></tr>
<tr><td>All Web</td><td>25</td><td>
Upgrade the Web Host
Note: To upgrade the Cache Server, see task 24: Upgrade the Admin Tools and Servers installation.
To upgrade
1. You must log on as the local administrator to install the Web components on each machine.
2. On the Infor CRM Installation screen, click Server Installation.
3. On the Server Installation screen, click Web Host on IIS.
Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Installing prerequisites may require your computer to restart.
▪ Click Install to allow Infor CRM to install the required components.
▪ Click Cancel to stop the installation.
</td></tr>
</table>

Required for	Task	Description
		For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. 4. In the **Infor CRM Web Host** message box, click **Yes**. 5. On the **Welcome** screen, click **Next**. 6. On the **Setup Type** screen, select an installation type, and then click **Next**. ■ Select **Complete** to install the Web Host. ■ Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 7. If you installed the Cache Server on a computer other than the Web Host, you must manually configure the web.config file to access the Cache Server computer. See the “Configuring the Infor CRM Cache Server” topic in the Application Architect help for details 8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: ■ **Use an existing web site** - If you want the installation to use an existing Web site, click this button and select the Web site name. If you created an SData portal or Outlook sync in the Administrative Tools and Servers installation, you can select the existing Saleslogix Web site for the Web components. ■ **Create Web Site** – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals. ■ **Enter a Web site name** – Type the name of the Web site that will appear in IIS. The default name is Infor CRM ■ **Port** – Enter the port number that the Infor CRM Web site will use. Note the port number for future reference. You must use port number 1025 or greater. ■ **Domain** – Enter the network domain where you created the WebDLL user. ■ **User Account** – Enter the name of the WebDLL user you created. The default value is *WebDLL*. If you used a different name, type it exactly as you did when you created it. ■ **Password** and **Confirm Password** – Type the WebDLL user’s password. ■ **Configure Saleslogix Database** - Clear this check box if you do not want to connect to the database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled. • **Saleslogix Server** – Select or type the name of the computer on which you installed the Saleslogix Server. • **Saleslogix Database Alias** – Select or enter the name of the connection to the Infor CRM database. • **Search for servers on port** - Enter a port. By default, this is set to port number *1706*. • **User Name** – Enter a Infor CRM user name (such as Admin). • **Password** – Enter the Saleslogix Server password for the Infor CRM user. 9. On the remaining screens, click **Install** and **Finish** to complete the installation. **Note**: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not

Required for	Task	Description
		Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. 10. If prompted, restart your computer when the installation completes
All	**26**	**(Optional) Upgrade the Network Client** If the Infor CRM Network Client is installed on your Administrative Workstation, run the Network Client installation to install the Client application. **To upgrade** 1. Infor CRM Installation browser > **Client Installations**> **Install Network Client**. **Note**: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation. 2. In the Infor CRM Network Client message box, click **Yes**. 3. On the **Welcome** screen, click **Next**. 4. On the **Setup Type** screen, select an installation type, and then click **Next**. ▪ Click **Complete** to install the most common components. ▪ Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 5. On the remaining screens, click **Install** and **Finish** to complete the installation. **Note**: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. 6. If prompted, restart your computer when the installation completes.
All	**27**	**Start the Administrator** On the **Start** menu, expand **Saleslogix**, and then click **Administrator**.
All	**28**	**Apply the Infor CRM v8.4 to v8.5 Upgrade.sxb bundle** Use the Administrator to apply the Infor CRM v8.4 to v8.5 Upgrade.sxb bundle. See the “Installing a Bundle” topic in the Administrator Help for instructions. This bundle is located in the Infor CRM media, in the Upgrades folder and includes functionality formerly released in Updates. The bundle contents are outlined in Chapter 3, "Changes in this release".
All Web	**29**	**Update existing Application Architect projects** Open the Application Architect to update existing projects. All existing projects that you open in the Application Architect must be updated to the new v8.5 structure. This only changes the format of the project.xml file and some of the XML components. You must still restore the ICRM v8.5.0 Project Backup.zip in task number 30. When opening a project created prior to version 8.5, you may be prompted to update the project format. **To update** 1. Open the Application Architect. 2. The Application Architect automatically opens the last project you were working with and the **Confirm Upgrade** dialog box opens. 3. Do one of the following:

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>
If you want to update the format of this project, click Yes.
If you do not want to update the format of this project, and you want to choose a different project, click No and then open the project you want to update.
4. After updating the project, information about the update can be found in the Output Window.
</td></tr>
<tr><td>All Web</td><td>30</td><td>
Restore the project backup

Restore the ICRM v8.5.0 project backup to the virtual file system (VFS) workspace.

Infor CRM provides a project backup file that contains all changes for this release. You must add these changes to upgrade your installation. When upgrading with project backups, you do not need to apply upgrade bundles.

To guarantee that a client will always have access to the project model, deploy the client portal from a virtual file system-based project. It will always be accessible to the client because the VFS resides in the Infor CRM database. Remotes MUST be deployed from a VFS-based project, and it is recommended that production systems be deployed from a VFS-based project as well.

To restore

Locate the ICRM v8.5.0 Project.Backup.zip file.
Project backups are located in the Upgrades\Project Backups folder.
Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible.
Open the Application Architect.
In the Project Workspaces window, select the VFS project workspace.
Right-click the project, and then click Restore Project
Select the Rebuild Schema from Project check box.
In the Select Project Backup File to Restore From dialog box, browse to the location where you saved the ICRM v8.5.0 Project.Backup.zip on your local machine (step 2).
Click OK.

</td></tr>
<tr><td>All</td><td>31</td><td>
Install the Actions bundle

Install the ICRM v8.5 VFS Actions.zip.

To install the bundle

Browse the Infor CRM media, expand the Upgrades folder, expand the Project Backups folder, and then copy the ICRM v8.5 VFS Actions.zip to a convenient location.
Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
In the Application Architect, in the Project Explorer, right-click the project, and then click Install Bundle.
Navigate to the folder where you copied theICRM v8.5 VFS Actions.zip, and then click Open.
On the Select Bundle screen, click Next.
On the Select Items screen, ensure the Portals option is selected.
Click Next, and then click Finish.

</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>All</td><td>32</td><td>Run the Infor CRM v8.5 Conversion Utility

Note Unless otherwise noted, each Conversion Utility action should be executed only once. If you previously ran any of these actions during an 8.4 update, you do not have to select and run that action again.

The Conversion Utility is required under the following circumstances:
All upgrades from v8.4.0.03 or earlier.
Back Office integrated environments with Master Data Consolidation enabled that are upgrading from 8.4.0.04 must run the Conversion Utility with Master Data Consolidation selected in order to update the SLXLocation.
Note: Non-integrated or integrated environments without Master Data Consolidation upgrading from 8.4.0.04 do not need to run the conversion utility.
This conversion utility provides the following important actions:
Master Data Consolidation
This option is required regardless of what version you are upgrading from in order to update the SLXLocation.

This is a non-reversible option that consolidates existing account records with the same CustomerID into a single account record. This option also moves all related information, such as activities, history, attachments, quotes, sales orders, invoices, shipments, returns and receivables to the new consolidated account.
Convert Quotes document shipping pricing
Converts the existing Quote shipping charge to the transaction currency based shipping charge which is based on the existing Quote freight charges and Infor CRM based transaction-specific exchange rate captured at the time of the transaction.
Convert Sales Orders document shipping pricing
Converts the existing Sales shipping charge to the transaction currency based shipping charge which is based on the existing Sales Order freight charges and Infor CRM based transaction-specific exchange rate captured at the time of the transaction.
Update user options for Quota, Forecasting, Activity, Event, and Lit Request default groups
Sets the new groups that are provided as Favorites so that they display by default in the list and detail views.
Expand activity occurrences
Existing recurring activity occurrences will be fanned out to use the new ActivityOccurrence table.
Expand activity associations
Existing associations with contacts, accounts, opportunities, tickets, or leads will be created in the ActivityAssociation table and the corresponding ID (ContactID, TicketID, etc) will remain in the Activity table.
If IsAttendee = True the record will remain in the ActivityAttendee table and will also be added to the ActivityAssociation table.
If IsAttendee = False, the record will be removed from the ActivityAttendee table and added to the ActivityAssociation table.
Expand history associations
Existing associations with contacts, accounts, opportunities, tickets, or leads will be created in the HistoryAssociation table and the corresponding ID (ContactID, TicketID, etc) will remain in the History table.</td></tr>
</table>

Required for	Task	Description

		Task 32 - continued
		
		To run the conversion utility
		1. On the Administrative Workstation, browse to the **ConversionUtility_8.5.exe** and **ConversionUtility_8.5.exe.config** files.
		By default, these are in . . .\Program Files\Saleslogix.
		2. Open the **ConversionUtility_8.5.exe.config** using the text editor of your choice.
		3. Scroll to the <connectionStrings> section and change the Initial Catalog value from
		SALESLOGIX_EVAL to your Saleslogix Connection Manager name.
		
		For example:
		`<connectionStrings>`
		`<clear/>`
		`<add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security`
		`Info=True;Initial Catalog=MyDatabaseAlias;Data Source=localhost;Extended`
		`Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOIN`
		`CBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NO`
		`NE""/> </connectionStrings>`
		`ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/> </connectionStrings>`
		4. Open the **ConversionUtility_8.5.exe** and sign in with your Infor CRM administrative username and password.
		5. In the Infor CRM v8.5 Conversion Utility interface, select the check boxes appropriate for your implementation:
		▪ Master Data Consolidation
		▪ Convert Quotes document shipping pricing
		▪ Convert Sales Orders document shipping pricing
		▪ Update user options for Quota, Forecasting, Activity, Event, and Lit Request default groups
		▪ Expand activity occurrences
		▪ Expand activity associations
		▪ Expand history associations
		
		For more information about each of these options, see page 13
		6. Click **Update**.
		7. Click **Close**.

All Mobile	**33**	**Verifying the Port and App Pool are set** Failure to set the Port and App Pool settings for your Mobile portal can cause the site to function as a virtual directory instead of an application. To prevent this, verify that the Port and App Pool are set before deploying the portal. **To verify the Port and App Pool**

Required for	Task	Description
		1. In the **Application Architect View** menu, click **Deployment Explorer**. 2. Expand **Deployments**, and then double-click the **Mobile Portal**. If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click OK. 3. In the **Deployment Targets** tree view, click **IIS.** The IIS Target Settings appear. 4. In the **Port** box, ensure that the port number for your Web Host server displays. 5. It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333. 6. In the **App Pool** box, ensure that the name of the application pool for your Web site displays. This name corresponds to the associated application pool for your Web site. For example, if you used the default Infor CRM Web site, the App Pool is Saleslogix. For more information about setting the Port and App Pools, see *Infor CRM Implementation Guide*.
All Mobile	**34**	**Enable multi-currency on the Mobile Client** If your implementation includes Multi-currency, and you have users on the Mobile Client, you must complete the steps in this section. Multi-currency is disabled by default. To enable Multi-currency, you must copy a setting from the products/argossaleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal. If you make your edit in the products/argossaleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade. **To enable multi-currency on the Mobile Client** 1. Open the **Application Architect**. 2. Open the **Project Explorer** and expand the **VFS** folder. 3. Expand the **Portal Manager**, **Infor CRM Mobile Client**, **SourceFiles**, **Products**, **argos-Saleslogix**, **configuration**. 4. Double-click **production.default.js.** 5. Locate '**multiCurrency**' and copy the setting. 6. Return to **Portal Manager**, **Infor CRM Mobile Client**, **SourceFiles**, **Products**, **argos-Saleslogix**, **configuration** 7. Double-click **production.js**. 8. Paste the text copied in step 6. The file contains additional instructions to assist you. 9. Change the setting from '**false'** to '**true**'. 10. In the Application Architect menu bar, click **Save All**.
All Mobile	**35**	**Changing the warehouse mode in the Mobile Client** Available to Promise enables users to see if there is stock on hand. If your implementation includes an integration with a back office that uses a specific warehouse location for the Available to Promise feature, you can enable users to check each warehouse inventory manually. Warehouse mode is disabled by default. To enable Warehouse mode, you must copy a setting from the products/argos-saleslogix/configuration/production.default.js

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>
file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal.
If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.
To edit the .js file

Open the Application Architect.
Open the Project Explorer and expand the VFS folder.
Expand the Portal Manager, Infor CRM Mobile Client, SourceFiles, Products, argos-saleslogix, configuration.
Double-click production.default.js.
Locate "warehouseDiscovery".
Copy the setting.
Return to Portal Manager, Infor CRM Mobile Client, SourceFiles, Products, argos-saleslogix, configuration.
Double-click production.js.
Paste the text you copied in step 6.
The file contains additional instructions to assist you.
Insert this line: * warehouseDiscovery: 'manual'.
In the Application Architect toolbar, click the Save All icon.

</td></tr>
<tr><td>All
Mobile</td><td>36</td><td>
Enable Offline Support in the Mobile Client
Offline support allows read-only access to select records and entities when a user's device is offline or loses connectivity.
Offline support is disabled by default. To enable offline support, you must edit the products/argossaleslogix/ configuration/production.js file before deploying the portal.
If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.
To edit the .js file

Open the Application Architect.
Open the Project Explorer and expand the VFS folder.
Expand the Portal Manager, Infor CRM Mobile Client, SourceFiles, Products, argos-saleslogix, configuration.
Double-click production.default.js.
Scroll to the bottom of the file and locate "enableOfflineSupport".
Copy the setting.
Return to Portal Manager, Infor CRM Mobile Client, SourceFiles, Products, argos-saleslogix, configuration.
Double-click production.js.
Paste the text you copied in step 6.
The file contains additional instructions to assist you.
Change the setting from 'false' to ' true'.
In the Application Architect toolbar, click the Save All icon.

</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>All web</td><td>37</td><td>Build and deploy the portals

You must verify the build path prior to building.

Note: This step is strongly recommended for customized environments to establish a functioning Web Client before adding customizations.

To build and deploy

1. In the Application Architect, on the Tools menu, click Build Settings.
2. In the Build Search Path, verify that the path is set to: %BASEBUILDPATH%\assemblies;%BASEBUILDPATH%\interfaces\bin; %BASEBUILDPATH%\forminterfaces\bin
3. If you needed to edit the path, you must also clear the output folders.
   ■ On the Build menu, click Clean Build Folders.
4. On the Build menu, click Build Web Platform.
Note: If an error message appears, log out of Application Architect, log back in, and repeat step 4.
5. When the build has completed, on the View menu, click the Deployment Explorer.
6. Expand Deployments and double-click Core Portals .
7. Click the Deploy All button.

Note: “Be sure to deploy the Mobile portal if your installation includes the Infor CRM Mobile Client.</td></tr>
<tr><td>All</td><td>38</td><td>Reset IIS

1. Close the Application Architect.
2. Stop and restart all Infor CRM services.
3. Reset IIS.</td></tr>
<tr><td>Web - Optional</td><td>39</td><td>Enable HTTP Compression

If your Web site(s) will use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.

You must be a member of the Administrators group on the local computer to enable compression.

Enabling dynamic compression will provide significantly smaller files over the network. In addition, there are a number of configuration elements that may be modified to provide more benefits. You may need to try different settings to achieve optimum results.

The following information can be used as a guide to implement compression in your Infor CRM implementation. To help evaluate and test your specific compression settings, you may want to use a third-party HTTP compression debugging tool.

To enable

1. Open IIS Manager, and select your Infor CRM Web site.
2. Under IIS, double-click Compression.
3. Select the Enable dynamic content compression check box.
4. If necessary, enable the dynamic content compression module in Server Manager</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>

(Roles) to enable the check box.

5. In the **Actions** pane, click **Apply**.
6. If necessary, modify the **ApplicationHost.config** file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.
IMPORTANT: Use the 64 bit version of a text editor (e.g. Notepad.exe) when editing ApplicationHost.config; otherwise, when using a 32 bit version of a text editor the file save will be redirected to %SystemRoot%\SysWow64\inetsrv\config\applicationHost.config and the compression settings will not take effect. The following command line can be used to edit the applicationHost.config file correctly:
"%WinDir%\Notepad.exe" "%SystemRoot%\System32\inetsrv\config\applicationHost.config"

Note: See the Microsoft IIS Web site at https://www.iis.net/ConfigReference for documentation regarding the settings below

Example Configuration Settings:

```
<httpCompression directory="%SystemDrive%\inetpub\temp\IIS
Temporary Compressed Files" maxDiskSpaceUsage="500"
noCompressionForHttp10="false" noCompressionForProxies="false"
>
<scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10"/>
<scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10" />
<staticTypes>
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</staticTypes>
<dynamicTypes>
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</dynamicTypes>
</httpCompression>
</Quote>
```

The following script will enable both static and dynamic compression based on the Infor CRM Implementation Guide recommendations:

```
REM staticTypes

REM Enable static compression
%windir%\System32\inetsrv\appcmd set config -
section:system.webServer/urlCompression
/doStaticCompression:"True" /commit:apphost

REM Clear the staticTypes section
%windir%\System32\inetsrv\appcmd clear config -
section:system.webServer/httpCompression /"staticTypes"
/commit:apphost
```

</td></tr>
</table>

Required for	Task	Description

		`%windir%\System32\inetsrv\appcmd set config -`
		`section:system.webServer/httpCompression /+"staticTypes.`
		`[mimeType='text/*',enabled='True']" /commit:apphost`
		
		`REM <add mimeType="message/*" enabled="true" />`
		`%windir%\System32\inetsrv\appcmd set config -`
		`section:system.webServer/httpCompression /+"staticTypes.`
		`[mimeType='message/*',enabled='True']" /commit:apphost`
		
		`REM <add mimeType="application/*" enabled="true" />`
		`%windir%\System32\inetsrv\appcmd set config -`
		`section:system.webServer/httpCompression /+"staticTypes.`
		`[mimeType='application/*',enabled='True']" /commit:apphost`
		7. Save your changes.

	40	**Next Steps:** If your installation includes customizations proceed to the next section "Re-applying your customizations": ■ Network Client, proceed to task number 41. ■ Web Client, proceed to task number 42. ■ Mobile Client, proceed to task number If your installation does not include customizations, you may proceed to one of the following the sections : ■ If your implementation includes remote offices or remote users, proceed to "Upgrading synchronization" on page 21. ■ If your implementation does not include remote offices or remote users, proceed to "Upgrading Web Clients" on page 22.

Re-applying your customizations

These tasks detail merging your preserved customizations with the new changes provided in the Infor CRM v8.5 upgrade. If your installation does not include customizations to the Network Client, Web Client or Mobile portal, you can safely omit this section and continue to the next section, "Upgrading synchronization" on page 21.

Required for	Task	Description
Customized Network	**41**	**Apply Network Client Customizations** Apply the changes listed in Chapter 3, "Changes in this release" on page 53. You can use one of the following strategies: ■ Add your customizations to the Infor CRM plugins (recommended). ■ Add the Infor CRM changes to your custom plugins. After applying plugin changes, release the appropriate plugins using Architect. See the “Release a Plugin for Use” topic in the Architect Help for information on releasing plugins.
Customized Web	**42**	**Apply Web Client Customizations** **Note**: If you have not customized your Web implementation, disregard this task and proceed to task , "Re-applying your customizations" above. Use the Application Architect to install the bundle of your Web customizations that you created in task number 10,"Create a bundle of your Web

Required for	Task	Description
		customizations " to the new v8.5 project workspace. **Note**: The default behavior has changed. Instead of overwriting the core, customizations are now written to their own safe area of the model. **To install your customization bundle** 1. Open Application Architect. 2. In the **Project Explorer**, right-click our project folder, and then click **Install Bundle**. The Select Bundle to Install dialog box opens. 3. Browse to and select the bundle you created in task number 10, containing your customizations, and then click **Open**. The Install Bundle dialog box appears. 4. Verify the **Bundle Path** information is correct, and then click **Next**. 5. On the **Select Items** screen, ensure the **Entity Model** and **Portals** check boxes are selected. 6. Click **Next**. 7. Click **Finish**.
Customized Web	**43**	**Apply Web Custom Schema** If necessary, apply your custom schema to the database. If the database you are restoring the project to is the database where your customizations were created, custom schema is already included. If you are applying a customization bundle that relies on custom schema to a new or different database than the database where the schema was developed, then you must also apply the bundle that contains your custom schema to the new database. You need to apply your custom schema if you created your customization bundle on a different database than the one on which you are applying the customization bundle.
Customized Web	**44**	**Recreate Web Dashboard Customizations** Recreate your Dashboard customizations with the customization you recorded in task number 10.
Customized Web	**45**	**Reapply Web Configuration Files customizations** Reapply customizations from the web.config file(s) to the web.config and appSettings.config file(s). In version 8.4 and later, application settings are located in the appSettings.config file. Customizations to the appSettings section must be merged into the appSettings.config file. For more information see the “Editing Configuration Files” topic in the Application Architect help. **To update** 1. In the **Application Architect,** open the **web.config** file. 2. Update the new web.config files with the customizations you recorded in task number 6. 3. Repeat for each customized web.config file in each portal. 4. In the **Application Architect**, open the **appSettings.config** file. 5. Update the new appsettings.config files with the customizations you

Required for	Task	Description
		recorded in task number 6. 6. Repeat for each customized appsettings.config file in each portal.
Customized Web	**46**	**Review Breaking Changes** If you have custom code, review the list of breaking changes to the Infor CRM API and change references to classes and members in your custom code as appropriate. Breaking code changes are identified in Chapter 3, "Changes in this release" on page 53.
Customized Mobile	**47**	**Merge Mobile Customizations** Recreate your Mobile customizations by merging in the customizations you recorded in task 11.
All Web - Recommended	**48**	**Import your upgraded project to the VFS.** After upgrading, you may want to import your upgraded project (stored locally) to the Virtual File System (containing the older project). This ensures the project in the VFS is the most recent version. For detailed steps to import the project, see the “Importing from Another Project” topic in the Application Architect Help.
Customized Web	**49**	**Build and Deploy Web Portals** Use the Application Architect to build and deploy the appropriate Web portal (s). Use the Rebuild Web Platform option on the Build menu when upgrading existing portals. See the “Rebuilding the Web Platform” and “Deploying Portals” topics in the Application Architect Help for instructions. Offline Web Clients must be deployed using the Virtual File System (VFS). Deployments created from a local file system are not supported and will not function correctly.

Upgrading synchronization

Required for	Task	Description
Remotes	**50**	**Upgrade Synchronization Server** If you did not upgrade the Synchronization Server(s) in task 24, do so now.
All	**51**	**Restart the Sync Service(s).** Restart the Sync Service for each Sync Server.

Upgrading Clients and Remote Offices

These tasks are required to upgrade your Clients. If your installation includes Remote Offices, upgrade steps are included in this section.

Upgrading Web Clients

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Web Client</td><td>52</td><td>Assign the Quotas and Forecasting Roles to Users

To allow users to use or manage quotas and forecasting, they must be assigned the appropriate role.

Infor CRM v8.4.0.3 introduced the following roles for Quotas and Forecasting functionality:
Quotas & Forecasting - Allows users to view quotas and view, add, edit, and delete forecasts.
Quota Management - Allows users to view, add, edit, and delete quotas.
See the “Assigning Users to a Role” topic in the Web Client Help for instructions.</td></tr>
<tr><td>Web Client</td><td>53</td><td>Instruct Users to Sign in to the Web Client

If necessary, send the Web Client URL to users through email. Your users click the URL or type it into a compatible browser on a desktop computer.

Instruct Web Client users to sign in to the updated Web Client portal.
No additional tasks are required.

if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM Xbar for Microsoft Outlook" on page 33.</td></tr>
</table>

Upgrading Network Clients

Required for	Task	Description
Network Client	**54**	**Install the Network Client** Run the Infor CRM Network Client installation on each of your Network user’s computers. 1. Infor CRM Installation browser > **Client Installations**> **Install Network Client**. **Note**: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation. 2. In the Infor CRM Network Client message box, click **Yes**. 3. On the **Welcome** screen, click **Next**. 4. On the **Setup Type** screen, select an installation type, and then click **Next**. ▪ Click **Complete** to install the most common components. ▪ Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 5. On the remaining screens, click **Install** and **Finish** to complete the installation. **Note**: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. 6. If prompted, restart your computer when the installation completes. If you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM Xbar for Microsoft Outlook" on page 33.

Upgrading Mobile Clients

Required for	Task	Description
Mobile Client	**55**	**Send Mobile URL to Users** If necessary, send the Mobile Portal URL to Users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed. For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile. The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.

Upgrading Remote Users and Offices

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Users and

Remote Offices</td><td>56</td><td>

Create a Remote User or Remote Office Database

In Infor CRM v8.5, you must create new Remote databases. Create these databases using a Microsoft SQL Server Express instance or the SQL Host Server.

When a remote database is created, it uses the host server collation settings. When the database is sent to the remote it will use the SQL Express installation collation settings.

When you install the Remote Client and use the Infor CRM media to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.

However, if you install SQL Express using a standalone install prior to installing Infor CRM then you must ensure that the collation is set correctly as per the Host Database, otherwise where the Windows System Locale is anything other than English (US), SQL Express will use the Windows System Locale settings to determine your collation and it will be incorrect.

To create

1. In the Infor CRM Administrator, on the Administrator **Tools** menu, do one of the following depending upon whether you are creating a Remote User database or a Remote Office database:
   - Click **Create Remote User Databases**.
   - Click **Create Remote Office Databases**.
2. In the **Create Database**s dialog box, do one of the following:
   - Under **Available Users**, select the user(s) for whom the database(s) will be created, and click the arrow to move them to the **Selected Users** box.
   - Under **Available Remote Offices**, select the offices(s) for which the database(s) will be created, and click the arrow to move them to the **Selected Remote Offices** box.
3. Configuring the default database settings is explained in “Setting Database Options” in the *Infor CRM Implementation Guide*. To change the settings for this user only, click **Options** or **Properties** and configure the changes.
4. To create the database(s), do one of the following:
   - To create the database(s) immediately, click **Now**.
   - To create the database(s) at a later time, click **Later**.
   - In the calendar, select a date and time, and then click **OK**.
The Administrator is unavailable when the timer is active.
   - The **Create Databases** dialog box displays a countdown to the scheduled date and time.

   A test is performed to ensure the settings are configured and that the database can be created in the chosen location.

   The database is created with the file name SLX_userid_dat.sxd.
Note: The default location where the remote databases are created is specified in Tools, Options, Database tab, in the “Create Remote DB in server directory” field.

</td></tr>
</table>

Required for	Task	Description
		Task 56 - continued 5. Click **OK** to confirm successful completion. 6. Transfer the database to the appropriate computer. ■ If the computer is connected to the network, create a folder on the Administrative Workstation and copy the database to the folder. Share this folder so that the Remote (User or Office) computer has access to it. ■ If the Remote is not connected to the network, copy the database to the user's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote user, and instruct the user to copy it to his or her computer and unzip it.
Remote Office	**57**	**Upgrade the Remote Office** Upgrade the Remote Office by running the Remote Office installation package. **To install** 1. On the **Infor CRM Installation** screen, click **Server Installation**. 2. On the **Server Installation** screen, click **Remote Office Server**. 3. On the **Welcome** screen, click **Next**. 4. On the **Setup Type** screen, select an installation type, and then click **Next**. ■ Select **Complete** to install all components on this computer. ■ Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: ■ **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Infor CRM. ■ **Domain** - Type the network domain where you created the Infor CRM Service user. ■ **User Name** - Type the name of the Infor CRM Service user (for example, SLXService). ■ **Password and Confirm** - Type the Infor CRM Service user's password. ■ Port **Change** button - Changes the port number used for communication between the Clients and Infor CRM Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. ■ **Configure IIS for the Web Server** - Select this check box if your installation includes the Infor CRM Client and\or SData portals. This makes necessary modifications to IIS. 6. On the remaining screens, click **Install** and **Finish** to complete the installation.
Remote Users	**58**	**Deploy the SData portal to Remote Client users.** In version 8.5, Infor CRM Remote Network Client users require an SData portal to enable support for such features as Infor CRM Xbar for Microsoft Outlook. Use the Application Architect to deploy this portal to the appropriate users.

Required for	Task	Description
		To deploy 1. On the Application Architect **View** menu, click **Deployment Explorer**. 2. In the **Deployments** tree view, double-click **Windows Remote Clients**. 3. In the **Deployment Targets** pane, click **Remote Users**. The Remote User Target Settings appear. 4. In the **Remote User Target Settings** pane, click **Add**. 5. In the **Select Remote User(s)** dialog box, select the names of the users who need to access the SData portal. 6. Click **OK**. 7. Ensure the **Deploy Portal** check box is selected. This indicates the portal is active and should be deployed. 8. Click **Save**. 9. Click **Deploy**. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.
Offline Web Client	**59**	**Deploy Web portals to Offline Web Client users.** Use the Application Architect to deploy the Infor CRM Web portals. The Web Portals are: ■ SlxClient ■ SData ■ SlxJob Service **To deploy** 1. On the Application Architect **View** menu, click **Deployment Explorer**. 2. In the **Deployments** tree view, double-click **Remote Sales Client**. 3. In the **Deployment Targets** pane, click **Remote Users**. The Remote User Target Settings appear. 4. In the **Remote User Target Settings** pane, click **Add**. 5. In the **Select Remote User(s)** dialog box, select the remote users who will receive the Offline Web Client deployment. 6. Click **OK**. 7. On the **SlxClient** tab: a. In the **Virtual Directory** box, type the alias name for the virtual directory. By default, the Virtual Directory is SlxClient. b. In the **Port** box, type the port number for the Web site. The Infor CRM Web Server requires its own port for each portal instance. The port for each portal must be unique. c. Ensure the **Deploy Portal** check box is selected. This indicates the portal is active and should be deployed. 8. Click **Save**. 9. Click **Deploy**. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Offices</td><td>60</td><td>Deploying the Web Portals for the Remote Office

Remote Offices can support both Windows Network Client users and Web Client users. Each type of user requires that you use the Application Architect installed at the main office to deploy the relevant portal(s).

For the Web Client user, the required portals are:
■ SlxClient
■ SData
■ SlxJob Service

For the Windows Network Client, the required portal is:
■ SData

To deploy portals for the Web Client user
1. On the Application Architect View menu, click Deployment Explorer.
2. In the Deployments tree view, double-click Remote Sales Client.
5. In the Deployment Targets tree view, click Remote Office(s).
6. The Remote Office Target Settings appear.
a. In the Server box, type the name of your Web Host server.
If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server.
b. Ensure the Deploy Target check box is selected.
This indicates the target is active and should be deployed.
c. In the Port box, type the port number for your Web Host server. It must match the port for the Web site.
d. In the App Pool box, type the name of the application pool for your Web site.
For example, if you used the Saleslogix Web site, the App Pool is Saleslogix.
7. In the Company Name list, select the Remote Office(s) to which you want to deploy the Web Client.
8. Select the tab for the SData portal.
a. In the Virtual Directory box, type the alias name for the virtual directory.
b. In the Sub Directory box, type the folder name where all portal files will be copied under the target’s base directory.
c. Ensure the Deploy Portal check box is selected.
This indicates the portal is active and should be deployed.
Note: When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.
9. Click Save.
10. Do one of the following:
a. Click Deploy to deploy portals individually.
b. Click Deploy All to deploy all portals in the Remote Office.</td></tr>
</table>

Required for	Task	Description
		Task 60 - continued The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, the portals are deployed to the remote.
All Remotes	**61**	**Running a Synchronization Cycle** After deploying the Web site, a synchronization cycle must run to deploy the portal to remotes. Synchronization is set to run automatically every 30 minutes. You can run a manual synchronization cycle immediately or wait for an automated cycle to complete.
Web Remotes	**62**	**Installing the Offline Web Client** Users do not need administrator rights to install or run the Offline Web Client. However, the Offline Web Client installation installs third-party prerequisites if they are not detected on the user's computer. Administrator rights are required to install the following: **Note:** Internet access to Microsoft.com is required to install some of these options. ■ Windows Installer 4.5.1 ■ Microsoft SQL Express2012 ■ .Net Framework 4.8 ■ .Net Framework 4.8 Developer Pack ■ Microsoft SQL 2005 Backwards Compatibility ■ .Net AJAX Extensions You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Infor CRM installation. **Installing Without Administrator Rights** To install the Offline Web Client without administrator rights, ensure you have installed all the prerequisites listed in the previous section. If the Offline Web Client installation does not detect the necessary prerequisites and the user running the installation does not have administrator rights, the Offline Web Client installation will not complete. **Installing With Administrator Rights** To install the Offline Web Client and the required prerequisites, you must grant the user administrator rights for the computer on which you are installing Infor CRM. See your Microsoft documentation for instructions on granting administrator rights using one of the following options: ■ Add each user to the local machine's Admin group for the duration of the implementation. ■ Use a domain user account that is a member of the domain admin group for the duration of the implementation. **To install** 1. On the **Infor CRM Installation** screen, click **Client Installation**s. 2. On the **Client Installation** screen, click **Install Offline Web Client**. 3. On the **Welcome** screens, read the information and then click **Nex**t. 4. On the remaining screens, click **Install** and **Finish** to complete the installation

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Users and Offices</td><td>63</td><td>Distribute Client Installations to you Remote users and Offices

You can distribute a copy of the Infor CRM media</td></tr>
<tr><td>Remotes</td><td>64</td><td>Instruct Remote users to upgrade the Infor CRM Client.

Remotes should upgrade using the Remote Client installation on the Infor CRM media.

To upgrade

1. In the Install browser (Setup.exe) click Client Installations> Install Remote Client.
Note: If the installation does not detect the necessary prerequisites you will be prompted to install them. Installing prerequisites may require your computer to restart.
▪ Click Install to allow Infor CRM to install the required components
▪ Click Cancel to stop the installation.
For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.

2. On the Welcome screen, read the information then click Next.

3. On the Setup Type screen, select an installation type, and then click Next.
▪ Select Complete to install all components on this computer.
▪ Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation.

4. On the remaining screens, click Install and Finish to complete the installation.
Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.

5. If prompted, restart your computer when the installation completes.

Note: If you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM Xbar for Microsoft Outlook" on page 33</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Users and offices, Offline Web Client users</td><td>65</td><td>Install the Remote Database
Before logging on to the Remote Client, you must attach the Remote database using the Remote Database Setup dialog box.
The connection contains the following values:
The Database Name is set to SLXRemote.
The Server Name is set to the name of the Remote user’s computer.
The User name is set to sa.
The sysdba password is set to Ma$t3rk3y.
When attaching the remote database, if the sysdba user does not exist, the user is created with a password set to Ma$t3rk3y. If the sysdba user already exists in the remote Microsoft SQL instance, then the sysdba user’s password remains unchanged. However, the database installation sets the sysdba password in the Connection Manager to Ma$t3rk3y. Therefore, if the sysdba password on the remote database is set to a value other than Ma$t3rk3y, the Remote user must open the Connection Manager and change the sysdba password to the value in their database.</td></tr>
<tr><td></td><td></td><td>Task 65 - continued
To install
Browse to the location of the Remote user database.
For Remote Users and Offline Web Client users, the database file name is SLX_userid_dat.sxd.
For Remote Offices, the databases the database file name is SLX_ sitecode_dat.sxd
Double-click the Remote database.
In the Remote Database Setup dialog box, click OK.
In the Infor CRM Attach Remote dialog box click OK to confirm a successful installation.
If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the ‘Select the name of the SQL instance to use’ dialog box.
The Attach Remote utility assumes the sa password is SLXMa$t3r. If you did not install Microsoft SQL Express using the Infor CRM installation, you may have to change the sa password in the Remote Database Setup dialog box before the database can be successfully attached.</td></tr>
<tr><td>Remote Users and offices, Offline Web Client users</td><td>66</td><td>Run a Synchronization Cycle
Users must run a synchronization cycle before they can log on to the Web Client. The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.
To run
On the Start menu, expand Saleslogix, and then click Synchronization Client.
Log on using your Infor CRM user name and password.
Click Sync Now.</td></tr>
<tr><td>Web Remotes</td><td>67</td><td>Signing in to the Web Client
After running a synchronization cycle to set up the portal, users can sign in to the Web Client using the system tray icon.</td></tr>
</table>

Required for	Task	Description
		To log on 1. Right-click the system tray icon, and then click **Open Site**. 2. Log on using the standard Web Client log on screen
Remote Office	**68**	**Populate views for the Remote Office Web Client** In a Remote Office environment, sign into the Infor CRM LAN Client once before signing into the Infor CRM Web Client. This allows some views in the Web Client database to populate correctly. If you do not sign into the LAN Client before signing into the Web Client, an error will appear when attempting to open the Detail dialog caused by the missing database views.
Remote User	**69**	**Start the Remote Client** After installation, the user who installed Infor CRM must log on to the Client computer(s) for the first time and launch various applications. This process creates the necessary registry entries for each application and creates a connection to the Remote database. If the standard user does not have rights to install Infor CRM, an admin user must start the Client application. If the standard user has installation rights, he/she can simply log on and begin using Infor CRM. The Infor CRM Client must write to restricted areas of the registry. Therefore, once an admin user has logged on to the Client, a standard user can read from the registry’s restricted area. **To start** 1. On the **Start** menu, expand **Saleslogix**, and then click **Infor CRM Client**. 2. In the Please log on dialog box: a. Type your Username and Password. b. In the Log on to box, ensure the correct database connection name displays (for example, SLXRemote). c. Click OK. 4. (Optional) Configure synchronization of the Remote user’s database to run automatically when the user is logged on to the main office database. For more information on automated synchronization, see the “Infor CRM Synchronization Client” topic in the Infor CRM Client Help.
	70	**Creating a SpeedSearch Schedule** You can set a schedule on the Remote user’s computer to determine when SpeedSearch indexes are run. If a schedule is not set and your Host updates indexes when the Remote computer is turned off, the indexes on the Remote are updated when the user starts their computer. This update may delay the user as he/she cannot immediately start their work. **To create** 1. On the Infor CRM Client **Tools** menu, click **SpeedSearch Options**. 2. In the **Index** list, select the index(es) for which you want to set a schedule. 3. In the **Full Update** section, select the date and time you want the index(es) to complete a full update. 4. In the **Daily Update** section, select how you want to schedule daily incremental updates. ▪ **When Infor CRM Opens** - All enabled indexes are updated when you open the Infor CRM Client.

Required for	Task	Description
		■ **When Infor CRM Closes** - All enabled indexes are updated when you close the Infor CRM Client. ■ **Once at** - Select the time of day that you want to update all enabled indexes. ■ **Repeat Every** - Select or type how often you want all enabled indexes to be updated. 5. Click **OK**.
Remotes	**71**	**Instruct Remote users and Remote Offices to log on to the Synchronization Client and sync immediately after upgrading.** Ensure Remote users and Offices enable “Apply Changes” during the synchronization cycle.
Remotes	**72**	**Cycle the Synchronization Server** Cycle your Synchronization Server(s) so changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription. See the “Creating a Custom Sync Cycle” topic in the Administrator Help for more information.

Additional Web Client upgrade tasks

Required for	Task	Description
All Web	**73**	**Instruct Web Client and Offline Web Client users to download the Office Integration Module** Office Integration extends Infor CRM Web Client functionality by downloading client-side files for Mail Merge. **Note**: Outlook Integration (Send to CRM and Record to History) functionality is delivered with Xbar. See "Upgrading Infor CRM Xbar for Microsoft Outlook" on page 33. **To install and configure** 1. Sign in to the **Infor CRM Web Client.** ■ For Web Client users, open the Infor CRM Web site. ■ For Offline Web Client users, in your System Tray, right-click **Personal Web Server**, point to **SlxClient**, and click **Open Site**. 2. Expand the **Tools** menu and then click **Options**. 3. Click the **General** tab, and then click **Install Office Integration**. 4. Follow the installation instructions on screen. You must be a Power User or Admin user to install Outlook Integration.
All Web	**74**	**Clear the web browser’s cache** Before logging into the upgraded Web Client, instruct users to clear the cache of the web browser. For detailed steps, please refer to your browser's help.
Web Client (optional) Customer	**75**	**Re-configure Password Self-Service** Password self-service is available for the Infor CRM Web Client and for the Customer Portal. This feature allows users to reset their own passwords and request their usernames. If your installation included Password Self-service and you want to continue to use it, you must reconfigure it now.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Portal (optional)</td><td></td><td>The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file.

When editing the appSettings.config file, be sure to do so in the VFS. If you edit in in the file system, your changes may be overwritten if the appSetting.config file is redeployed.

To turn password self-service on
Open the Application Architect and expand the Project Explorer.
Expand Portal Manager>SlxClient>Support Files, and then double-click appSettings.config.
Scroll through the file to locate “Defines the settings for sending email”.
Edit using the instructions in the appSettings.config file for guidance.
Save your edits.
Deploy the SlxClient portal.
If necessary, repeat these steps to turn Password Self-service on for the Customer Portal.
Note: To use such email services as Gmail and Hotmail, the enableSSL setting must be set to True both in the appconfig settings and also on the mail service being used.</td></tr>
</table>

Configuring Optional Features

This section addresses steps for configuring optional features available in Infor CRM v8.5.

Upgrading Infor CRM Xbar for Microsoft Outlook

Provide users with instructions for installing Xbar for Microsoft Outlook, and with their connection credentials.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Infor CRM Xbar for Microsoft Outlook</td><td>76</td><td>Enable users to install Infor CRM Xbar for Microsoft Outlook.

Infor CRM Xbar for Microsoft Outlook must be installed on each user’s machine. In most cases, the user performs the installation him or herself. To enable the installation to be successful, the Administrator must do the following:
Ensure users have the correct role. Each Xbar user must have been assigned the Standard User Role in the Core product.
For information on assigning user roles, see the topic called "User Detail View" in the Web Client help.
Ensure that users have Power User rights or greater for their computers.</td></tr>
<tr><td>Infor CRM Xbar for Microsoft Outlook</td><td>77</td><td>Copy the Infor CRM Xbar Setup.exe set up files to the location where it can be accessed by your users

The Infor CRM Xbar Setup.exe is provided on the Infor CRM media. To make the install available, do the following:
Infor CRM Web Client users install Infor CRM Xbar from the Web Client Tools, Options, General tab, where there is an Install Xbar for Outlook button. To enable this button to function correctly you must copy the Infor CRM Xbar Setup.exe to C:\inetpub\wwwroot\SlxClient\Libraries\DesktopIntegration.</td></tr>
</table>

Required for	Task	Description
		▪ Infor CRM Windows Network Client users must manually launch the setup.exe. Copy the Infor CRM Xbar Setup.exe to a convenient location and share that location with your Network Client users.
Infor CRM Xbar for Microsoft Outlook	**78**	**Provide users with instructions for installing Xbar** Provide your Infor CRM Web Client users with the following installation instructions: **Infor CRM Web Client users** 1. Sign in to the **Infor CRM Web Client**, expand the **Tools** menu and then click **Options**. 2. Click the **General** tab, and then click **Install Xbar for Outlook**. 3. Follow the installation instructions on screen. **Infor CRM Windows Client user** 1. Browse to the location provided by your Infor CRM Administrator and copy the **Infor CRM Xbar Setup.exe** to any convenient folder. 2. Click **Infor CRM Xbar Setup.exe** , and then click **Install**.
Infor CRM Xbar for Microsoft Outlook	**79**	**Providing connection credentials** Users will require connection strings, user names, and passwords to be able to successfully sign into Xbar. Share the following information with each of your Xbar users: ▪ **User Name:** Type your username. This is the username you use to log on to the CRM Clients. ▪ **Password:** Type your password. This is the password you use to log on to the CRM Clients. ▪ **Service URL:** This is the URL for your SData portal. For example: http://web.address.com/Sdata. ▪ **Client URL:** This is the URL for your Windows or Web Client. For example, http://web.address.com/SLXClient. The first time Microsoft Outlook is opened after installing Infor CRM Xbar, each user will be invited to configure the Outlook Connector. Instruct users to follow the instructions in the Online Help topic provided.

Upgrading Infor CRM Back Office Extension

These tasks assume that you are upgrading an existing implementation. If you are configuring the Infor CRM Back Office Extension integration for the first time, do not follow the steps in this section. Refer to the following documents instead:

- Infor CRM Implementation Guide (*Infor CRM Implementation Guide.pdf*)
- Infor CRM Back Office Extension Customization Guide (*Infor CRM Back Office Extension Customization Guide.pdf*)
- Infor CRM Back Office Extension Configuration Guide for Infor ION (*Infor CRM Back Office Extension Configuration Guide for Infor ION.pdf*)

Infor CRM Back Office Extension features require that you have first installed Infor ION and configured connections using Infor ION Connect.

Back Office Integration is not supported for Windows Network Clients or for Remotes (Offline Web Clients, Remote Offices, or Remote Network Client users).

Required for	Task	Task Description
Back Office Extension integration	**80**	**Ensure that Infor CRM v8.5 has Multicurrency enabled** See the topic called “Managing Currency” in the Administrator help file for more information. The currency code must match your ERP base currency.
Back Office Extension integration	**81**	**Ensure that the Infor CRM Mobile Client has Multicurrency enabled** If your implementation includes the Mobile Client, ensure you have enabled multi-currency on the Mobile Client as detailed in task 34 of "Upgrading your core components".
Back Office Extension integration	**82**	**Execute the Conversion Utility** Ensure you executed the following conversion utility options task 32 of "Upgrading your core components" ▪ Master Data Consolidation This option is only for implementations with Back Office Extension integrations with M3, LX, or Visual host ERP systems with Master Data Consolidation enabled. This option is required regardless of what version you are upgrading from in order to update the SLXLocation. This is a non-reversible option that consolidates existing account records with the same CustomerID into a single account record. This option also moves all related information, such as activities, history, attachments, quotes, sales orders, invoices, shipments, returns and receivables to the new consolidated account. ▪ Convert Quotes document shipping pricing Converts the existing Quote shipping charge to the transaction currency based shipping charge which is based on the existing Quote freight charges and Infor CRM based transaction-specific exchange rate captured at the time of the transaction. ▪ Convert Sales Orders document shipping pricing Converts the existing Sales shipping charge to the transaction currency based shipping charge which is based on the existing Sales Order freight charges and Infor CRM based transaction-specific exchange rate captured at the time of the transaction.

Required for	Task	Task Description
Back Office Extension integration	**83**	**Upgrade the BOD pack bundles.** BODS are Business Object Documents. They are the Infor ION messages that enable exchange of information between a supported ERP system and Infor CRM. Infor provides a BOD pack specific to each integration. For a full discussion of BODs, see the *Infor CRM Back Office Extension Configuration Guide* appendix named “BOD overview”. **To upgrade an existing BOD Pack bundle** 1. From the product media, BOD Packs folder, copy the version of the BOD pack bundle that matches your ERP system and paste it to a convenient location. For example, if your ERP system is LN, use the BOD pack named Infor CRM VFS BOE BOE Pack LN 8.5.0.0.zip. 2. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties. 3. In the **Application Architect,** in the **Project Explorer,** right-click the project, and then click **Install Bundle**. 4. Navigate to the folder where you copied the BOD Pack.zip, and then click **Open**. 5. On the **Select Bundle** screen, click **Next.** 6. On the **Select Items** screen, ensure the **Portals** option is selected. 7. Click **Next**, and then click **Finish**.
Back Office Extension integration	**84**	**If necessary, create and customize your own BODs using AnyBod** For more information, see the documents called *Infor CRM Back Office Extension Customization User Guide* and *Infor CRM Back Office Extension Configuration Guide for Infor ION*. Both documents are available from the Infor Support Portal on the Infor Concierge web site: https://concierge.infor.com/.
Back Office Extension integration	**85**	**(Optional) Customizing your Back Office Extension configuration.** If necessary, you can customize your Back Office Extension implementation. See the documents called *Infor CRM Back Office Extension Customization Guide* and *Infor CRM Back Office Extension Configuration Guide for Infor ION*. Note: Be sure to review and implement the new IOBOX optimization scripts presented in the *Infor CRM Back Office Extension Configuration Guide for Infor ION*, Chapter 4, Defining the Infor CRM IOBOX."
Back Office Extension integration	**86**	**(Optional) Enable Normalized Base Currency.** The Normalize Base Currency feature enables capturing transactions in varying currencies from multiple back offices or accounting entities and being able to report based on a single currency. It uses the base currency defined by Infor CRM. For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “Enabling the Normalize Base Currency Values custom setting”.
Back Office Extension integration	**87**	**(Optional) 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

Required for	Task	Task Description
		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 version of Infor CRM. For more information about this feature, and for instructions on how to enable permissions, see the Infor CRM Web Client help topic named “Enabling Refresh Pricing”.
Back Office Extension integration	**88**	**(Optional) Enable Master Data Consolidation** This feature consolidates duplicate accounts with the same CustomerID, which can result when host systems such as ERP-M3, ERP-LX and ERP-Visual. This applies to Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Products, and Persons. ▪ This feature is off by default until you select the Master Data Consolidation option when running the Conversion Utility. ▪ Once Master Data Consolidation has been enabled, you cannot roll back the converted data. If your environment does not already contain pre-existing data from an ERP system, you can enable Master Data Consolidation from the Infor CRM Web Client. **To enable** 1. Sign in to the **Infor CRM Web Client** as **Administrator**. 2. On the Navigation bar expand **Integration**, click **Integrations**. 3. In the list view, select **Back Office Extension**. 4. In the detail view, on the **Options** tab, scroll to locate **Master Data Consolidation**. 5. Double-click in the **Value** column and change **False** to **True**. 6. Click the Save icon. If you are upgrading an environment that contains pre-existing data duplicates, and you did not run Master Data Consolidation in task 35, you may do so at any time. **To consolidate existing data** 1. On the machine where Infor CRM Admin Tools is installed, locate the **ConversionUtility_8.5.exe**. This is typically “C:\Program Files (x86)\Saleslogix” 2. Open **ConversionUtility_8.5.exe**. 3. Select **Master Data Consolidation**. 4. Click **Update**.
Back Office Extension integration	**89**	**(Optional) Enabling System of Record** Optionally, Infor CRM may publish a limited set of Business Object Documents, BODs, as the system of record in the absence of a host ERP system. 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**.

Required for	Task	Task Description
		2. On the **Integrations** List view, click **Back Office Extension**, and click the **Options** tab. 3. Locate and 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. For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “What is System of Record?”. **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**, select **Roles**, and select the role assigned to users who are to be given permissions to Promote. 3. You may choose to create a new role or assign these permissions to an existing role, such as the Standard Use role. 4. Click the **Actions** tab. 5. Click the Add (plus) button. 6. In the **Lookup**, perform a search by selecting **Name**, then select **Contains**, and then type **Promote**. 7. Double-click each action you want to assign to the role, and then click **Close** to close the Lookup.

Required for	Task	Task Description
Back Office Extension integration	**90**	**(Optional) 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. You do not have to reconfigure Price and Availability if you already configured it during a previous update. **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. **For on-premises implementations using Basic authentication** **To modify** 1. Sign in to Infor CRM as Administrator. 2. In the Navigation Bar, expand **Administration**, and then click **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, click 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. **For multi-tenant implementations using OAuth-2 authentication** Please refer to KB 2183558 for set-up instructions.

<table>
<tr><th>Required for</th><th>Task</th><th>Task Description</th></tr>
<tr><td>Back Office Extension integration</td><td>91</td><td>
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 Back Office Extension Customization Guide. This document is available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/.

Confirm necessary BOD Mapping Outbound triggers are enabled

These triggers must be enabled on any entity that is bi-directional, for Infor 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

Sign in to Infor CRM as Administrator.
In the Navigation Bar, expand Administration, and then click Integrations.
Click Back Office Extension.
In the Back Office Extension detail view, click the Back Offices tab.
Click to select your Back Office.
In the Back Office detail view, in the BOD Mappings tab, review the settings in the following columns for each mapping:

Outbound on Create
Enables creating new records in CRM and promoting them to the host system.
Outbound on Update
Enables modifying promoted records and publishing changes to the host system.
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.

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.

</td></tr>
</table>

Enabling integration with Infor Configure Price Quote (CPQ)

These tasks assume that you are already have Infor Configure Price Quote installed and configured in your environment. For more information, see the Infor documentation that accompanied CPQ.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td>92</td><td>
(Optional) Enable Infor CRM Sales Orders and Quotes to use Infor Configure Price Quote (CPQ-Configurator).
Infor CPQ provides a visual, rules-based configurator software that integrates with Infor CRM to accelerate product configuration, pricing and quoting. The connection to Infor CPQ is available in Infor CRM. You must enable the configuration and then create the configuration groups that will provide the correct components.
For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “Infor CPQ Overview”.
To enable

Sign in to the Infor CRM Web Client as Administrator.
In the Navigation Bar, expand Integration and then click Integrations.
In the Integrations List View, click Infor CPQ.
In the Integration - Infor CPQ detail view,
The integration boxes will be autofilled by default.
Click the Enabled check box and then click Save.
Select the Configuration Group tab and then click Add Configuration (plus icon).
In the Add Configuration Group window, type the information that will connect Infor CRM to the product information in the product configurator. If you do not have this information, contact your CPQ administrator:

Application Name: The application name registered in the Product Configuration Manager Enterprise Manager. It is a combination of the configuration model and the output database. For example: InforCRM_DB.
Config Group Name: Type the intuitive name of your choice.
Description: A description of the group.
Instance Name: The instance ID that identifies your database instance. For example, InforCRM_DB. A single server can host several instances of PCM Configurator.
Name Space: The namespace of the product configurator model as defined in PCM Design Studio.
Ruleset Name: This is the name of the Product Configuration Model as defined in PCM Design Studio. For example, if the product being designed is a bicycle, the Ruleset name assigned might be “Bike”.
Service URL: The URL for the Integration Web Service.
API Key: The key used to identify the tenant connection to the API. This key can be acquired by the tenant administrator through the PCM Home page. Keep this key private.

</td></tr>
</table>

Required for	Task	Description
		Task 92 - continued 8. Click **Test link**. 9. If the test status is successful, click **OK**. 10. Repeat steps to **6** though **9** for each group you need to add.

Enabling integration with Infor Ming.le

Required for	Task	Description
Infor Ming.le	**93**	**(Optional) Integrate with Infor Ming.le** For steps to integrate Infor CRM v8.5 with Ming.le, see the following documents: ▪ Integrating Infor CRM with Infor Mingle_cloud.pdf ▪ Integrating Infor CRM with Infor Mingle_on-premises.pdf. Both documents are available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/.
	94	**(Optional) Enabling CPQ Enterprise Quoting** The implementation of the Infor CPQ Enterprise Quoting user interface as the Infor CRM Quote user interface requires: ▪ Infor CPQ Configurator implemented and configured. See task 92. ▪ Infor CPQ Enterprise Quoting integration configuration parameters and endpoint defined in the Infor CRM, Infor CPQ integration form EQ Configuration tab. ▪ EQ BOD Pack loaded and configured with the corresponding ION Connection Point Logical ID. ▪ Integration with a CPQ Enterprise Quoting compatible host ERP system. ▪ Infor CRM Master Data Consolidation option enabled. See task 88. **To enable CPQ-Enterprise Quote user interface:** 1. Provision Infor CRM in a common Infor Ming.le tenant with Infor CPQ Enterprise Quoting 2. Sign in to the **Infor CRM Web Client** as Administrator. 3. In the Navigation Bar, expand **Administration** and then click **Integrations**. 4. In the **Integrations** list View, click **Infor CPQ**. 5. In the **Integration - Infor CPQ** detail view, the integration boxes will be automatically completed by default. 6. Update the **EQ Configuration** tab content using on the implementation settings of CPQ Enterprise Quoting. 7. Update the **Configuration Group** tab with the **CPQ configurator** integration parameters. 8. On the **Infor CPQ integration** detail view, select the **Enabled** check box. 9. Click **Save**. 10. Update the **Infor EQ Back Office Logical ID**.

Required for	Task	Description
		11. If you have not already run the conversion utility to enable the Master Data Consolidation integration to convert the pre-existing data, do so using the steps in task 88.

Next Steps

You have completed the upgrade to Infor CRM v8.5. For more information about the changes in this release:

See Chapter 2, "What's New in this release" on page 45 and the “What’s New in this Release” topic in the online Help systems for an explanation of the new features.

See Chapter 3, "Changes in this release" on page 53 for information about the schema, plugins, and files changes in this release.

Chapter 2
What's New in this release

2

This chapter lists all of the changes to Infor CRM since version 8.4. See the “What’s New in this Release” topic in the online Help systems for more information about the new features.

Any change in the underlying architecture in the base product causing customizations to not function properly is identified as a [Breaking Change].

General enhancements

- Administrator:
  - New Office Financial Settings tab to support new Query Builder date parameters. (8.4.0.04)
  - New Office Groups tab to support the ability to secure groups from subqueries. (8.4.0.04)
- Query Builder (8.4.0.04)
  - Discontinuing the support of subqueries, by providing new out-of-the-box query parameters to replace subqueries and the ability for customers to create and manage their own custom query parameters.
  - Out-of-the-box date parameters allow for queries based on dynamic timeframes.
- [Breaking Change]The ActivityEditor.js and the HistoryEditor.js have been modified which may break customizations. (8.4.0.04)
- [Breaking Change]Changes to the Sage.Platform.dll, introduced in Web Core Update 01 for Infor CRM version 8.4, may cause customizations to not function properly. Any customizations that use these functions must be modified. Use the table below to replace the removed methods. (8.4.0.01)

Removed Method	Replace with
IDbConnection CreateConnection (DbProviderFactory factory, string connectionString)	IDbConnection connection = factory.CreateConnection(); connection.ConnectionString = connectionString;
IDbCommand CreateCommand (DbProviderFactory factory, IDbConnection connection)	IDbCommand cmd = factory.CreateCommand(); cmd.Connection = connection;
IDbCommand CreateCommand (DbProviderFactory factory, string commandText)	IDbCommand cmd = factory.CreateCommand(); cmd.CommandText = commandText;
IDbCommand CreateCommand (DbProviderFactory factory, string commandText, IDbConnection connection)	IDbCommand cmd = factory.CreateCommand(); cmd.CommandText = commandText; cmd.Connection = connection

Web Client enhancements

- Refreshed user interface .(8.4.0.03, 8.4.0.04, 8.5)
  - Web Client icons upgraded to the Uplift icon set. (8.4.0.04)
    - The Associate and Remove buttons now use Associate and Remove icons instead of the Add and Delete icons.(8.5)
    - On the Campaign detail view, Targets tab, the Update Target button now uses the reload icon instead of the recurring icon. (8.5)
  - Customer Portal Icons upgraded to the Uplift icon set. (8.5)
  - Removed borders from editable (SData) grids (8.5)
  - Removed borders from tab fields (8.5)
  - The vertical spacing between Navigation Bar items was reduced (8.5)
  - Event and Literature navigation items were moved below Calendar on the Navigation Bar (8.5)
  - Removed "Infor CRM" from the menu bar. (8.5)
  - In any list view or grid, the first column linked to record is now bold (8.5)
    - For all Contracts groups, the Reference # column is now the first column (8.5)
    - For all Activity and Notes/History tabs, the Regarding column is now a link to the activity records and has been moved to the right of the Type column. (8.5)
    - For all groups in the Activity List View, the regarding column has been moved to between the Type and Start columns. (8.5)
    - For all Standard Problem groups, the Description column is now the first column and a link and the Standard Problem ID column was removed. (8.5)
    - For all Standard Resolution groups, the Description column is now the first column and a link and the Standard Resolution ID column was removed. (8.5)
    - For all Literature Items groups, Name column is now the first column followed by Item Number as the second column (8.5)
- Updated the Help About dialog box to show SNC and Web versions instead of SNC, Core, and Model versions. 8.5
- The new Dashboards feature provides all new configurable widgets including new funnel, gauge, and donut charts, and the ability to add multiple data sources for some chart types. (8.5)
  See the topic called “Working with Dashboards” in the Web Client online help for more information.
- Activities entity is available for the Dashboard and Welcome page. (8.5)
- The Welcome page funnel chart now uses the same funnel chart widget as the New Dashboard. (8.5)
- Activity enhancements (8.4.0.04)
  - Ability to associate multiple records to an activity, including: contacts, accounts, opportunities, tickets, and leads and now sales orders, quotes, campaigns, returns, and defects.
  - The Activities and Notes/History tabs have been added to the Sales Orders, Quotes, Campaigns, Returns, and Defects detail views.
  - Associated records are prominently listed on the General tab in a sortable and scrollable list.
  - The Participants tab is now the Attendees tab and only lists contacts or leads who will or did attend the activity.
  - Attendees are automatically added as Associations.
  - If a contact or lead is added as an association, the user is prompted to add the contact or lead as an attendee.
  - The Notes field is a little larger and is able to display more characters than previous releases.

- Ability to associate multiple records with a note, including: contacts, accounts, opportunities, tickets, and leads and now sales orders, quotes, campaigns, returns, and defects.
- Fanning out recurring activity occurrences.
- Activities list view supports groups and standard list view features.
- The Events tab was removed from the Activities list view now has its own list view.
- Literature Requests tab was removed from the Activities list view and can now be viewed, scheduled, and managed in the Literature Requests list view.

- Quotas and Forecasting list and detail views allow management of sales goals and tools to measure performance towards those goals. (8.4.0.03)
  - Users with the appropriate access may:
    - View, add, and manage quotas
    - View, add, and manage forecasts
  - Forecast Pipeline displays opportunity pipeline information segmented by criteria such as manager, country, or product.
  - Opportunity Forecast Dashboard - enables users to see opportunity pipeline analytics in the form of charting and list widgets.
  - New Opportunity groups:
    - Forecasted to Close in 30 Days or less
    - Forecasted to Close in 30 to 60 days
    - Forecasted 61 Days or more
  - Ability to add and remove records to and from Quotas or Forecasts ad hoc groups. (8.5)
- CRM Workflows provide configurable automated email notifications based on updated CRM content. (8.4.0.04)
  - New review and approval process includes: (8.5)
    - Individual or group approval processes
    - Configurable approval criteria
    - Escalation support
  - An updated template editor with the following enhancements: (8.5)
    - Token selection has transitioned to the standard @ mention user interface
    - Expanded constant tokens include: $Link_ApprovalForm, $Link_DetailForm, $EntityType, and $ApprovalStatus
  - Department, team, Infor CRM User, and email related properties are now supported as valid notification address selections (8.5)
  - The Step condition editor now includes support for related data content and the new expanded constant tokens (8.5)
  - New CRM Workflows list view providing visibility of both active and complete CRM Workflow instances. (Groups include: All CRM Workflows, Active CRM Workflows, and My Active CRM Workflows.) (8.5)
  - New CRM Workflows tab added to Accounts, Contacts, Opportunities, Quotes, and Sales Orders detail views. (8.5)
  - New CRM Workflow step instance detail view providing the user interface to approve of disapprove pending workflow approval steps. (8.5)
  - Allows the use of CRM properties in the email subject field of a workflow step. (8.5)
- Query Builder (8.4.0.04)
  - Discontinuing the support of subqueries, by providing new out-of-the-box query parameters to replace subqueries and the ability for customers to create and manage their own custom query parameters.
  - Out-of-the-box date parameters allow for queries based on dynamic timeframes.

  - Adding Conditions and Select Value dialog boxes have been resized to display larger by default and can be resized.
- Marketo Partitioning(8.4.0.02)
  - Marketo Partitions is an optional feature within a Marketo integration. When enabled, Marketo Partitions enables a contact or lead (defined by email address) to be listed as many times as there are partitions. This allows different marketing teams to market to the same person while tracking results independently.
    For more information, please refer to the *Configuring Marketo Integration for the Infor CRM WebClient.pdf* document.
- New Help About information page (8.4.0.01)
  - In 8.4 and earlier, the Help menu About option displayed a page in the Web Client online Help that showed the version number. Now that help is hosted separately from the product, the product requires a separate About information page to ensure the accurate version number is available.
- GDPR compliance (8.4.0.01)
  - When creating a new contact, the Do not Solicit, Do not Email, Do not Call, Do not Mail, and Do not Fax fields are now selected by default. These check boxes will be selected when viewing the contact's detail view. This change was made to provide a process to support compliance with GDPR.
  - This only applies to new contact records. Settings for the Do not Solicit check box and sub-check boxes for contact records for customers in the system prior to upgrading to Infor CRM v8.4.0.1 are not impacted.
- The Account detail view Contacts tab now displays Status and Preferred Contact information. (8.5)
- When viewing database changes on the Notes/History tab, the Account Manager and Owner information now display the UserID and user name on separate lines if permitted by the administrator (8.5).
- Contact lookups are now filtered to exclude inactive contacts. (8.5)
- Contacts can no longer be both inactive and primary. A primary contact cannot be made inactive and inactive contacts cannot be marked as primary. (8.5)
- ERP Notes improvements to user experience. (8.5).
- Inactive products can no longer be added to opportunities, quotes, or sales orders. (8.5)
- The following Sales Order and Quote fields have been increased to 100 characters. (8.5)
  - Quote.CustomerRFQNumber
  - SalesOrder.CustomerPurchaseOrderNumber
  - SalesOrder.CustomerRFQNumber

Web Client Administrator enhancements

Administrators and users with appropriate role access have access to the following enhancements:

- In the Application Architect, customizations are now being stored separately from core files, entities, and entity properties. This includes changes made in the Web Client Entity Manager and Form Manager. For more information see the Application Architect help topic "Working with Customizations". (8.5)
- The User import automatically maps the user fields, so you no longer need to select a template map fields. (8.4.0.03)
- New Financial Settings tab on the Office Profile to set options for Fiscal Year and Forecast and Quota periods. (8.4.0.03)
- REST API Swagger docs for SDATA. (8.4.0.04)
- Performance improvement (8.4.0.01):
  - Inserting and updating GroupStatistics now uses the NHibernate IStatelessSession.
- Contour has an updated Google API (8.4.0.01)
- The ability to expose entities for Dashboards from the Entity Manager. (8.5)
- The ability to synchronize leads with Outlook Sync. Requires Xbar 1.4.1. (8.5)

- The ability to lock the sync direction for Outlook Sync resources. Requires Xbar 1.4.1. (8.5)
- Office Profiles Privacy tab allows Administrators to share anonymous usage data with Infor. (8.4.0.01) Selecting this check box is optional. Data gathered will help Infor improve the product.
- When the new ShowUserIDOnHistoryChange custom setting is set to True, will display the Account Manager and Owner UserID and user name on separate lines when viewing database changes on the Notes/History tab. (8.5).
- In any list view or grid, the first column linked to record is now bold (8.5)
  - In the Custom Settings list view, the Description column is now the second column and Unique ID is the third column. (8.5)
- The Exchange Rate Services Integration and Job Schedule were removed. (8.5)

Back Office Integration enhancements

- Enhancements for two-way Sales Order support with Cloud Suite Distribution (CSD) includes (8.4.0.03):
  - CRM based manual override of Shipping Charges
  - CRM based manual price overrides
- Enhanced Quote, and Sales order, integrated snapshot summary (8.4.0.03)
- Enhanced M3 ProcessQuote BOD content (8.4.0.03)
- Promotion Failure Notifications (8.4.0.01)
  - When Infor CRM is integrated with a supported ERP system, if an update made by Infor CRM is rejected by the ERP, the user is now notified that the update has failed.
    - A Ming.le task can be generated to the user who last worked on the record.
    - An email can be sent and the task escalated if it is not assigned or completed.
    - Auto cancellation of outstanding task is possible if an attempt is made to sync data.
    - These actions do not impact the record itself.
- Two Way Quotes and Sales Orders (8.4.0.01)
  - When Infor CRM is integrated with a supported ERP system, Infor CRM Web Client users who are creating a Sales Order will see the Order location defined using the term that matches the location used by the ERP: Warehouse, Site, or Office. Product selections will be based on ERP: Warehouse, Site, Office, or Logical ID.
  - In an integrated environment, the Products now includes a location lookup and filtered product lookups.
- Integrated Product lookups now include both the product's actual ID and the product's description. (8.5)
- ION Workflow enhancements (8.4.0.01)
  - The following features have been added to support creating new ION Workflows:
    - Users with appropriate permissions can create new workflows by copying and editing existing workflows.
    - New workflows created by copying are automatically given a unique workflow name.
    - New workflows are set to inactive and the auto trigger is set to false by default.
- ERP Notes improvements to user experience. (8.5).
- The BOE cache is now updated when the IBOEPAMapping entity is inserted, updated or deleted. (8.5)
- Added a new BODfieldMapping for Product.ActualID. (8.5)
- For BOE environments integrated with Visual, IFMVS0000167 is updated to Specification/Property/Note [@type='PART']. (8.5)
- For CSI/CSB (SyteLine) on-premise environments, quotes with a status of Unapproved, Awarded, Lost, Replaced, Canceled, Deleted or Pending will now be read-only (8.5)
- Increased the OAUTH2ACCESSTOKEN from 1024 to 3072 (8.5)

- For administrators: (8.5)
  - Optimized Back Office Extension inbound handler
    - Pending BODs are processed in a prioritized Last-in-First-out (LIFO) sequence once the IOBOX database has been updated with the new SqlServer_CreateInboxLifoIndexes.sql script.

Ming.le enhancements

There were no Ming.le enhancements since version 8.4.

Windows Client enhancements

- Added an Associations tab to the Activity and History dialog boxes. (8.5)
- Added Microsoft Office 64-bit support for Windows Client, except for Advanced Outlook Integration. (8.5)
- Recurring activities created in the Windows Client are fanned out and stored as separate instances similar to the Web Client. (8.5)
- Windows Client supports the Activity Association feature introduced in the Web Client. (8.5)

Mobile enhancements

The following enhancements have been added since Infor CRM Mobile Client version 3.6.

Infor CRM Mobile Client v4.2 contains the following enhancements:

- Activity Associations on the Activity and History detail views provides:
  - Ability to view associations on the Activity and History detail views, including sales orders, quotes, campaigns, returns, and defects that were associated to an activity in the Web client.
  - Ability to add a new primary association to an activity without removing the previous primary record.
Note: The new association will be the primary record.
  - Ability to remove associations.
- Attendees on the Activity and History detail views provides:
  - Ability to view contacts or leads who attended or are expected to attend an activity.
  - Ability to add and remove activity attendees.
Note: Attendees cannot be added or removed from a history item.
- Group application preferences are now user-specific rather than just device specific.
- The signed in user’s name is visible in the About details.
- The detail views have been updated to reduce the amount of space for the title.
- The expired password message has been updated.

Infor CRM Mobile Client v4.1 contains the following enhancements:

- The "Remember Me" option can now be hidden to require users to sign in each time.
- Users can now create and complete an activity in one step from the My Day activity list. Users tap the Add button, select the activity type, enter activity information, and upon pressing Save, the new activity is created and completed.
- Users can now add a ticket as a quick action from the Account view.
- Integrations with ERP can now refresh opportunity price information.

Infor CRM Mobile Client 4.0 contained the following enhancements:

- The Infor CRM Mobile Client user interface can automatically re-arrange layout to accommodate screen size for a tablet or desktop. This allows more information to displayed in one view compared to a mobile device.
- Infor SOHO user interface designs are now applied to the Mobile Client views.
- Language and Regional Formats are now separated, enabling users to define each separately. The Regional Formats drop down controls the dates, times, numbers, and currency.
- Users can now create notes while working in Offline mode. The notes are synchronized to Infor CRM during the next online session.
- Multi-Regional Pick Lists: settings made in the Infor CRM Web Client will now cascade into the Mobile Client. This enables Mobile Client users to see the prefix and suffix displayed in the language selected in the Infor CRM Web Client.
- When viewing PDF files, users can now zoom in and out, and view multiple pages on all supported browsers.

Application Architect enhancements

- Upgrade safe enhancements
  - Customizations are now stored separately from core Infor CRM files, entities, and entity properties. For details see "Working with Customizations". (8.5)
  - Ability to create a bundle of your customizations. (8.5)
  - New attribute Is Custom identifies if the selected item is customized or not. (8.5)
  - A new icon identifies customized items in the Entity Model and Portal Manager. (8.5)
  - In the Portal Manager, pages are now identified with the page icon, not the entity icon. (8.5)
  - Portal Manager no longer displays core files that cannot be customized. (8.5)
  - The following items are no longer needed when installing a bundle and have been deprecated:(8.5)
    - The ability to browse to a Merge Content Path from a previous install.
    - The ability to merge changes during install.
- New properties for allowing entities and parent entities to be associated with activities and notes. (8.4.0.04)
- A new topic explains how to change the Web Client main image. (8.5)
- New attribute for allowing entities, relationships, or properties to be included in the CRM Workflow content. (8.4.0.04)
  Enabled entities define the set of entities enabled for CRM Workflows. Enabled relationships and properties define the set of CRM entity properties and related entity properties automatically populated into the CRM Workflow Properties tab.
  - The following items are no longer needed when installing a bundle and have been deprecated:(8.5)
    - The ability to browse to a Merge Content Path from a previous install.
    - The ability to merge changes during install.
- New property for allowing entities, relationships, or properties to be included in the CRM Workflow content
  Enabled entities define the set of entities enabled for CRM Workflows.
  Enabled relationships and properties define the set of CRM entity properties and related entity properties automatically populated into the CRM Workflow Properties tab.

Deprecated Features

- The Exchange Rate Services Integration and Job Schedule were removed due to changes made by the service provider.. (8.5)
- The Show history for all attendees activity option is no longer needed and has been removed. (8.4.0.04)

- In the Application Architect, when installing a bundle, the following features have been deprecated:
  - The ability to browse to a Merge Content Path from a previous install.
  - The ability to merge changes during install.

Chapter 3
Changes in this release

3

In addition to the new functionality described in Chapter 2, "What's New in this release", Infor CRM 8.5 fixes product defects. This includes defects previously addressed in Updates. Refer to the Fixed Issues List on the Infor Support Portal Web site for more information.

Changes are listed in the following sections by category (new or updated), type (form, script, and so on), and then alphabetically by name within the category and type.

Entities (New)	Entities (Updated)	Properties	Relationships
Views	Tables (not in Entity Model)	Inserted Records	Scripts
Filters	Indexes	Events	Business Rules
Database Objects (.sxb)	Database Objects (VFS)	Plugins	Reports
Picklists	Windows forms	Portal pages	Quick forms
Smart Parts	Modules	Menus	Navigation
Context menus	Tasklets	Configuration files	Custom Settings
Roles	Secured Actions	Deprecated items	

Finding script changes

Changes to Infor CRM scripts, and scripts on forms, can be researched using a third-party comparison utility such as Beyond Compare or Microsoft Word. You can use the following example procedure to determine the Infor script changes in this release. Then, use that information to either update your custom scripts with the Infor changes, or add your customizations to the Infor script.

To find script changes

1. Apply the upgrade bundle to a test environment.
2. Open the original version of the script or form you want to research in the Architect.
3. Do one of the following:
   - For a form: Click the **Script** tab, right-click the script, and then click **Select All**.
   - For a script: Right-click the script, and then click **Select All**.
4. Copy and paste the information to a text editor, such as WordPad.
5. Save the script with the version number in the name.
6. Repeat steps 2 - 5 for the same plugin updated in this release.
7. Open the original plugin version in Microsoft Word (saved in step 5).
8. On the **Tools** menu, click **Compare and Merge Documents**.
9. Browse to and select the updated plugin (saved in step 6) and click **Merge**.
10. View the code changes and determine how to merge the Infor CRM changes with your customizations.

New Entities

The following lists entities added since in v8.4.

Entity	8.4.x	8.5
ActivityAssociation	04	
ActivityOccurrence	04	
CustomQueryParameter	04	
Forecast	03	
ForeCastAudit	03	
ForecastOpportunity	03	
ForecastSnapshot	03	
ForecastSummary	03	
HistoryAssociation	04	
OportunityStateSummary	03	
ProductLocation	01	
WorkflowInstance	04	
WorkflowProperty	04	
WorkflowStep	04	
WorkflowStepInstance	04	

Updated Entities

The following lists entities updated since in v8.4. If a change is not listed in the description, then it was likely a change to attributes on properties of the table.

Most entities were updated in order to implement the new Is Custom attribute added in version 8.5 in support of the Upgrade Safe Customizations feature.

Entity	8.4.x	8.5
BOEAckStatusNotifications	01	
GeoCodeProviderConfiguration	03	
SlxLocationAccountingEntity	02	
TicketSolutions	01	

New or Updated Properties or Fields

The following lists properties added or updated since in v8.4

Entity	Property	8.4.x	8.5
Account	ExternalAccountNumber	04	
Account	InternalAccountNumber	04	
Account	MarketoId	03	
Account	PrimaryOperatingCompId	04	
AccountAccountingEntity	ErpVariationId	02	
AccountOperatingCompany	AccountOperatingCompId	04	
Attachment	ActivityId	01	
Attachment	AttachId	04	
BackOffice	OAuth2AccessToken	02	
BackOffice	TokenExpiryDate	02	
BODMapping	AccountingEntityJunction	02	
BOEPAService	AccessTokenURL	02	
BOEPAService	AuthGrantType	02	
BOEPAService	AuthKey	02	
BOEPAService	AuthorizationSecret	02	
BOEPAService	AuthSignature	02	
BOEPAService	AuthType	02	
BOEPAService	AuthURL	02	
BOEPAService	Password	02	
BOEPAService	RedirectURL	02	
BOEPAService	SignatureMethod	02	
BOEPAService	Username	02	
BranchOptions	AnonymousUsage	01	
BranchOptions	FromEmailAddress	04	
BranchOptions	FromEmailPassword	04	
BranchOptions	SecureGroups	04	
BranchOptions	SMTPEmailServer	04	
BranchOptions	SMTPPort	04	
Campaign	CampaignName	01	
Campaign	Description	01	
ContactAccountingEntity	ErpVariationId	02	
CustomSetting	Category	03	
CustomSetting	CreateDate	03	
CustomSetting	CreateUser	03	
CustomSetting	CustomSettingsId	03	
CustomSetting	DataKey	03	
CustomSetting	DataType	03	

Entity	Property	8.4.x	8.5
CustomSetting	DataValidation	03	
CustomSetting	DataValue	03	
CustomSetting	Description	03	
CustomSetting	ModifyDate	03	
CustomSetting	ModifyUser	03	
CustomSetting	SecCodeId	03	
CustomSetting	VersionNumber	03	
ERPAccountPerson	ErpAccountPersonId	03	
ERPAccountPerson	ErpPersonId	03	
ERPBillToAccountingEntity	ErpVariationId	02	
ERPContactAccount	IsPrimaryContact	02	
ERPInvoice	ErpAccountingEntity	03	8.5
ERPInvoice	ErpStatus	01	
ERPPayFromAccountingEntity	ErpVariationId	02	
ERPPerson	Description	04	
ERPPerson	Erp	04	
ERPPerson	ErpAccountingEntityId	04	
ERPPerson	ErpDisplayId	04	
ERPPerson	ErpExtId	04	
ERPPerson	ErpLogicalId	04	
ERPPerson	ErpStatus	01	
ERPPerson	ErpUniqueId	04	
ERPPerson	Name	04	
ERPPerson	Role	04	
ERPPersonAccountingEntity	ErpVariationId	02	
ERPReceivable	ErpStatus	01	
ERPShipment	ErpDocRef	04	
ERPShipment	ErpDocRefType	04	
ERPShipment	ErpStatus	01	
ERPShipToAccountingEntity	ErpVariationId	02	
History	AccountName	04	
History	ContactName	04	
History	CreateSource	04	
History	IONWorkflowDefinitionID	04	
History	IONWorkflowDefinitionName	01	
History	LeadName	04	
History	Location	04	
History	LongNotes	04	
History	Notes	04	
History	OpportunityName	04	

Entity	Property	8.4.x	8.5
History	ProcessNode	04	
History	ResultCode	04	
History	TicketNumber	04	
History	UserDef1	04	
History	UserDef2	04	
History	UserDef3	04	
History	UserName	04	
HistoryAssociation	EntityId	04	
HistoryAssociation	EntityName	04	
HistoryAssociation	HistoryAssociationID	04	
IntegrationResource	SyncDirectionLocked		8.5
IONWorkflow	InitialDelay	04	
IONWorkflow	IsActive	04	
IONWorkflow	IsPending	04	
IONWorkflow	WorkflowId	04	
IONWorkflow	WorkflowType	04	
IONWorkflowDefinition	ApproverEmailList	01	
IONWorkflowDefinition	CreateDate	01	
IONWorkflowDefinition	CreateUser	01	
IONWorkflowDefinition	Description	04	
IONWorkflowDefinition	EntityName	01	
IONWorkflowDefinition	InitialDelay	04	
IONWorkflowDefinition	IONWorkflowName	01	
IONWorkflowDefinition	IsActive	01	
IONWorkflowDefinition	IsAutomatic	01	
IONWorkflowDefinition	LockForm	01	
IONWorkflowDefinition	ModifyDate	01	
IONWorkflowDefinition	ModifyUser	01	
IONWorkflowDefinition	Notes	04	
IONWorkflowDefinition	Query	01	
IONWorkflowDefinition	UsernameProperty	01	
IONWorkflowDefinition	WorkflowDefinitionId	01	
IONWorkflowDefinition	WorkflowType	04	
IONWorkflowMapping	CreateDate	01	
IONWorkflowMapping	CreateUser	01	
IONWorkflowMapping	EntityName	01	
IONWorkflowMapping	IsActive	01	
IONWorkflowMapping	IsCustom	01	
IONWorkflowMapping	MappingName	01	

Entity	Property	8.4.x	8.5
IONWorkflowMapping	ModifyDate	01	
IONWorkflowMapping	ModifyUser	01	
IONWorkflowMapping	Parent	01	
IONWorkflowMapping	Property	01	
IONWorkflowMapping	RelationName	01	
IONWorkflowMapping	SyncDirection	01	
IONWorkflowMapping	WorkflowDefinitionId	01	
IONWorkflowMapping	WorkflowMappingId	01	
IONWorkflowMapping	XPath	01	
JoinData	Secondary	01	
Lead	ChangeKey		8.5
LibraryDirs	DirId	04	
LibraryDocs	DirId	04	
LitRequest	LitReqId	04	
LitRequestItem	LitReqId	04	
MarketoLead	DisplayName	01	
MarketoLead	MarketoPartitionId	02	
MarketoLead	MarketoPersonId	01	
OfficeProfile	AnonymousUsage	01	
OfficeProfile	FiscalYearStart	03	
OfficeProfile	FromEmailAddress	04	
OfficeProfile	FromEmailPasswrd	04	
OfficeProfile	QuotaAndForecastBy	03	
OfficeProfile	SecureGroups	04	
OfficeProfile	UseCustomerPortalHelp	01, 02	
OfficeProfile	UseWebHelp	01, 02	
Opportunity	ErpAccountingEntityId	03	
Opportunity	LocationId	02	
Period	PeriodId	03	
Product	ErpAccountingEntityId	03	
Product	ErpConfiguredItem	03	
Product	ErpCost	03	
Product	ErpCostMethod	03	
Product	ErpExtId	03	
Product	ErpLastRefresh	03	
Product	ErpLeadTome	03	
Product	ErpLogicalId	03	
Product	ErpLotControlled	03	
Product	ErpPerQuantity	03	
Product	ErpPerQuantityUOM	03	

Entity	Property	8.4.x	8.5
Product	ErpSerialControlled	03	
Product	ErpServiceProduct	03	
Product	ErpShelfLife	03	
Product	ErpStatusDate	03	
Product	ErpStorageUOM	03	
Product	ErpUniqueId	03	
Product	ErpUpcId	03	
Product	ErpVariationId	03	
ProductAccountingEntity	ErpVariationId	02	
ProductLocation	ERPLocationId	03	
Quota	Amount	03	
Quota	BeginDate	03	
Quota	CreateDate	03	
Quota	CreateUser	03	
Quota	Description	03	
Quota	EndDate	03	
Quota	IsActive	03	
Quota	ModifyDate	03	
Quota	ModifyUser	03	
Quota	QuotaId	03	
Quota	UserId	03	
Quote	DocFreight	03	
Quote	ErpFreightReasonCode	03	
Quote	ErpLocation	03	
Quote	IncludeErpFreight	03	
Quote	IncludeErpFreight	03	
Quote	LocationId	03	
Quote	Status	01	
Quote	WarehouseId	03	
QuoteItem	ErpNotes	03	
QuoteItem	OverridePricing	03	
RemoteAttachment	AttachId	04	
Return	ErpAccountingEntityId	03	
Return	ErpBaseCurrencyAmount	03	
Return	ErpBillToId	03	
Return	ErpCarrierParty	03	
Return	ErpDocLocation	03	
Return	ErpDocRef	03	
Return	ErpDocRefAcctEntityId	03	

Entity	Property	8.4.x	8.5
Return	ErpDocRefType	03	
Return	ErpDocumentDate	03	
Return	ErpExtendedAmount	03	
Return	ERPExtendedBaseAmount	03	
Return	ErpExtId	03	
Return	ErpGrandTotal	03	
Return	ErpIncoTerm	03	
Return	ErpLocation	03	
Return	ErpLogicalId	03	
Return	ErpReturnNumber	03	
Return	ErpShipToId	03	
Return	ERPTotalBaseAmount	03	
Return	ErpUniqueId	03	
Return	ErpVariationId	03	
Role	ErpAccountingEntityId	03	
Role	ErpExtId	03	
Role	ErpLogicalId	03	
Role	ErpRoleName	03	
Role	ErpUniqueId	03	
Role	ErpVariationId	03	
SalesOrder	CustomerPurchaseOrderNumber		8.5
SalesOrder	DocFreight	03	
SalesOrder	ErpFob	03	
SalesOrder	ErpFreightReasonCode	03	
SalesOrder	IncludeErpFreight	03	
SalesOrder	LocationId	03	
SalesOrder	PricingRequiredIndicator	03	
SalesOrder	WarehouseLocationId	03	
SalesOrderItem	OverridePricing	03	
SlxLocationAccountingEntity	BackOfficeAcctEntityId	02	
SlxLocationAccountingEntity	BackOfficeId	02	
SlxLocationAccountingEntity	CreateDate	02	
SlxLocationAccountingEntity	CreateUser	02	
SlxLocationAccountingEntity	IsDefault	02	
SlxLocationAccountingEntity	ModifyDate	02	
SlxLocationAccountingEntity	ModifyUser	02	
SlxLocationAccountingEntity	SlxLocationAccountingEntityId	02	
SlxLocationAccountingEntity	SlxLocationId	02	
SYSBOEOutboundTxn	JobData	01	
Ticket	First	01	

Entity	Property	8.4.x	8.5
TicketProblem	CreateDate	01	
TicketProblem	CreateUser	01	
TicketProblem	ModifyDate	01	
TicketProblem	ModifyUser	01	
TicketProblem	Notes	01	
TicketProblem	TicketId	01	
TicketSolution	Notes	04	
UserIntegrationMap	Authentication	04	
UserIntegrationMap	EmailAddress	04	
UserIntegrationMap	ExternalIdentifier	04	
UserRole	CreateDate	01	
UserRole	CreateUser	01	
UserRole	ModifyDate	01	
UserRole	ModifyUser	01	
UserRole	RoleId	01	
UserRole	UserId	01	
UserRole	UserroleId	01	

New or Updated Relationships

The following lists relationships added or updated since in v8.4

Parent	Relationship	Child	8.4.x	8.5
Account.AccountManager	M:1	User	04	
Account.Address	M:1	Address		8.5
Account.BOEAckStatusNotifications	1:M	BOE Acknowledgement Status Notification.Account	01	
Account.Contacts	1:M	Contact.Account	04	
Account.Contracts	1:M	Contract.Account	04	
Account.DefaultTicketOwner	M:1	Owner	04	
Account.DivisionalManager	M:1	User	04	
Account.ErpInvoices	1:M	Invoice.Account	04	
Account.ErpShipments	1:M	Shipment.Account		8.5
Account.HistoryAssociations	1:M	History Association.Account	04	
Account.LeadSource	M:1	Lead Source	04	
Account.Opportunities	M:1	Opportunity.Account	04	
Account.Quotes	1:M	Quote.Account	04	
Account.RegionalManager	M:1	User	04	
Account.Returns	1:M	Return.Account	04	
Account.SalesOrders	1:M	Sales Order.Account	04	
Account.ShippingAddress	M:1	Address	04	
Account.SlxLocation	M:1	Location	04	
Account.Tickets	1:M	Ticket.Account	04	
AccountErpBuyerContact	M:1	Contact	04	
Activity.ActivityAssociations	1:M	Activity Association.Activity	04	
Activity.ActivityOccurrences	1:M	Activity Occurrence.Activity	04	
Activity.Leader	M:1	User		

Parent	Relationship	Child	8.4.x	8.5
Back Office Accounting Entity.SlxLocationAccountingEntities	1:M	SlxLocationAcountingEntity.BackOfficeAcctEntity	02	
Back Office.SlxLocationAccountingEntities	1:M	SlxLocationAccountingEntity.BackOffice	02	
Bill To.ErpInvoices	1:M	Invoice.ErpBillTo	04	
Bill To.Quotes	1:M	Quote.BillTo	04	
Campaign Stage.LeadSource	M:1	Lead Source	04	
Campaign Targets View.Campaign	M:1	Campaign	04	
Campaign Targets View.Owner	M:1	Owner	04	
Campaign.AccountManager	M:1	User	04	
Campaign.Owner	M:1	Owner	04	
Carrier.Accounts	1:M	Account.Carrier	04	
Carrier.Quotes	1:M	Quote.Carrier	04	
Carrier.SalesOrders	1:M	Sales Order. Carrier	04	
Commodity Group.Commodities	1:M	Product.CommodityGroup		8.5
Competitor.Account	M:1	Account	04	
Contact.AccountManager	M:1	User	04	
Contact.Address	M:1	Address	04	
Contact.Contracts	1:M	Contract.Contact	04	
Contact.DivisionalManager	M:1	User	04	
Contact.HistoryAssociations	1:M	History Association.Contact	04	
Contact.Opportunities	1:M	Opportunity Contact.Contact	04	
Contact.Owner	M:1	Owner	04	
Contact.Quotes	1:M	Quotes.RequestedBy	04	
Contact.RegionalManager	M:1	User	04	
Contact.SalesOrders	1:M	Sales Order.RequestedBy	04	
Contact.ShippingAddress	M:1	Address	04	
Contact.SlCustomers	M:1	SlCustomer	04	
Contact.Tickets	1:M	Ticket.Contact	04	
Contract Item.Asset	M:1	Account Product	04	

Parent	Relationship	Child	8.4.x	8.5
Contract.Incidents	1:M	Contract Incident.Contract	04	
Contract.Items	1:M	Contract Item.Contract	04	
Contract.Owner	M:1	Owner	04	
Contract.Tickets	1:M	Ticket.Contract	04	
CRM Workflow.ActiveStepInstance	M:1	Workflow Step Instance		8.5
Defect Activity Item.DefectActivityTate	M:1	Defect Activity Rate	04	
Defect Activity Item.User	M:1	User	04	
Defect Product.Product	M:1	Product	04	
Defect.AssignedTo	M:1	Owner	04	
Defect.ClosedBy	M:1	Owner	04	
Defect.Owner	M:1	Owner	04	
Defect.RecordedBy	M:1	Owner	04	
Department.Owner	M:1	Owner	04	
Event.User	M:1	User	04	
Forecast Summary OpportunityProductSummaries	1:M	OpportunityProductSummaryView	04	
Forecast Summary.OpportunityCountrySummaries	1:M	OpportunityCountrySummaryView	04	
Forecast Summary.OpportunityDirectorSummaries	1:M	OpportunityDirectorSummaryView	04	
Forecast Summary.OpportunityRegionSummaries	1:M	OpportunityRegionSummaryView	04	
Forecast Summary.OpportunityRSMSummaries	1:M	OpportunityRSMSummaryView	04	
Forecast Summary.OpportunityStateSummaries	1:M	OpportunityStateSummaryView	04	
Forecast.AssignedTo	M:1	User	03	
Forecast.ForecastAudits	1:M	Forecast Audit.Forecast	03	
Forecast.ForecastOpportunities	1:M	Forecast Opportunity.Forecast	03	
Forecast.ForecastSnapshots	1:M	Forecast Snapshot.Forecast	03	
History.HistoryAssociations	1:M	History Association.History	04	
Import History.Owner	M:1	Owner	04	
Import Template.Owner	M:1	Owner	04	
Integration.MarketoPartitions	1:M	Marketo Partition.Integration	02	
Invoice.ErpBillingAddress	M:1	Invoice Address	04	

Parent	Relationship	Child	8.4.x	8.5
Invoice.ErpShipingAddress	M:1	Invoice Address	04	
Lead History.Owner	M:1	Owner	04	
Lead Import Map.User	M:1	User	04	
Lead Qualifiation.Qualification	M:1	Qualification	04	
Lead Qualification.Lead	M:1	Lead	04	
Lead Sync View.Lead	M:1	Lead	04	
Lead.AccountManager	M:1	User	04	
Lead.Address	M:1	Lead Address	04	
Lead.HistoryAssociations	M:1	History Association.Lead	04	
Lead.LeadSource	M:1	Lead Source	04	
Lead.Owner	M:1	Owner	04	
Lead.QualificationCategory	M:1	Qualification	04	
Literature Request.FillUser	M:1	User	04	
Literature Request.RequestUser	M:1	User	04	
Location.ProductLocations	1:M	Product Location.SlxLocation	01	
Location.SlxLocationAccountingEntities	1:M	SlxLocationAccountingEntity.SlxLocation	02	
Marketing Service Campaign.Campaign	M:1	Campaign	04	
Marketing Service User Information	M:1	User	04	
Marketo Partition.MarketoLeads	1:M	Marketo Lead.MarketoPartition	02	
Opportunity,Owner	M:1	Owner	04	
Opportunity.AccountManager	M:1	User	04	
Opportunity.DivisionalManager	M:1	User	04	
Opportunity.ForecastOpportunities	1:M	Forecast Opportunity.Opportunity	03	
Opportunity.LeadSource	M:1	Lead Source	04	
Opportunity.Location	M:1	Location	02	8.5
Opportunity.Quotes	1:M	Quote.Opportunity	04	
Opportunity.RegionalManager	M:1	User	04	
Opportunity.Reseller	M:1	Account	04	
Opportunity.SalesOrders	1:M	CRM Workflow.AccountManager		8.5

Parent	Relationship	Child	8.4.x	8.5
Owner.	1:M	Sales Order.Opportunity	04	
Owner.ErpInvoices	1:M	Invoice.Owner	04	
Owner.WorkflowInstances	1:M	Workflow.Owner		8.5
Person.AccountManager	M:1	User	04	
Person.Owner	M:1	Owner	04	
Product.ProductLocations	1:M	Product Location.Product	01	
ProductLocationView.UnitOfMeasure	M:1	Unit Of Measure	03	
ProductMasterDataEnabledView.UnitOfMeasure	M:1	Unit Of Measure	03	
Quote Item.OpportunityProduct	M:1	Opportunity Product	04	
Quote.AccountManager	M:1	User	04	
Quote.BillingAddress	M:1	Quote Address	04	
Quote.BillingContact	M:1	Contact	04	
Quote.Location	M:1	Location	03	
Quote.Owner	M:1	Owner	04	
Quote.SalesOrder	M:1	Sales Order.Quote	04	
Quote.ShippingAddress	M:1	Quote Address	04	
Quote.ShippingContact	M:1	Contact	04	
Quote.Warehouse	M:1	Location	03	
Sales Order. BillingContact	M:1	Contact	04	
Sales Order.AccountManager	M:1	User	04	
Sales Order.BilllingAddress	M:1	Sale Order Address	04	
Sales Order.Location	M:1	Location	03	
Sales Order.OperatingCompany	M:1	SData Sync Configuration	04	
Sales Order.Owner	M:1	Owner	04	
Sales Order.ShippingAddress	M:1	Sales Order Address	04	
Sales Order.ShippingContact	M:1	Contact	04	
Sales Order.WarehouseLocation	M:1	Location	03	
SData Sync Configuration.User	M:1	User	04	
Ship To.ErpInvoices	1:M	Invoice.ErpShipTo	04	

Parent	Relationship	Child	8.4.x	8.5
Ship To.Quotes	1:M	Quote.ShipTo	04	
Ship To.SalesOrders	1:M	Sales Order.ErpShipTo	04	
Team.Owner	M:1	Owner	04	
Ticket Account Product.AccountProduct	M:1	Account Product	04	
Ticket Activity Item.Product	M:1	Product	04	
Ticket Activity.RateTypeDescription	M:1	Ticket Activity Rate	04	
Ticket Activity.User	M:1	User	04	
Ticket Area Owner.AreaOwner	M:1	Owner	04	
Ticket.AssignedTo	M:1	Owner	04	
Ticket.CompletedBy	M:1	Owner	04	
Ticket.Owner	M:1	Owner	04	
Ticket.ReceivedBy	M:1	Owner	04	
Ticket.Returns	1:M	Return.Ticket		8.5
Ticket.Urgency	M:1	Urgency	04	
User Activity.User	M:1	User	04	
User Info.Address	M:1	Address	04	
User Info.AlternateAddress	M:1	Address	04	
User Info.HomeAddress	M:1	Address	04	
User.BOEAckStatusNotifications	1:M	BOE Acknowledgement Status Notification.User	01	
User.DefaultOwner	M:1	Owner.User	04	
User.Quotas	1:M	Quota.AssignedTo	04	
User.WorkflowInstances	1:M	CRM Workflow.AccountManager		8.5
User.WorkflowInstances2	1:M	CRM Workflow.AccountManagersManager		8.5
User.WorkflowStepReviewerInstances	1:M	Workflow Step Reviewer Instance User		8.5
Workflow Definition.WorkflowInstances	1:M	Workflow Instance.WorkflowDefinition	04	
Workflow Definition.WorkflowProperties	1:M	Workflow Property.IONWorkflowDefinition	04	
Workflow Definition.WorkflowSteps	1:M	Workflow Step.IONWorkflowDefinition	04	
Workflow Instance.WorkflowStepInstances	1:M	Workflow Step Instance.WorkflowInstance	04	
Workflow Step	1:M	Workflow Step Reviewer		8.5

Parent	Relationship	Child	8.4.x	8.5
Instance.WorkflowStepReviewerInstances		Instance.WorkflowStepInstance		
Workflow.WorkflowInstances	1:M	Workflow Instance.IONWorkflowDefinition	04	

New or Updated Views

The following lists views added or updated since in v8.4

Views	Property	8.4.x	8.5
AccountSyncView	all properties		8.5
ActivityResourceView	all properties		8.5
AttendeeCountView	all properties		8.5
BackOfficeMappingView	all properties		8.5
BackOfficePriceServiceView	all properties		8.5
BODMappingFieldMappingView	all properties		8.5
CalendarSyncView	all properties		8.5
CampaignTargetsView	all properties		8.5
ContactSyncView	all properties		8.5
ERPBillToInvoiceAgingView	all properties		8.5
ERPInvoiceAgingView	all properties		8.5
ERPInvoiceView	all properties		8.5
ERPShipToInvoiceAgingView	all properties		8.5
GroupReleasesView	all properties		8.5
GroupStatisticsView	all properties		8.5
LeadSyncView	all properties		8.5
OpportunityCountrySummaryView	all properties	03	8.5
OpportunityDirectorSummaryView	all properties	03	8.5
OpportunityProductSummaryView	all properties	03	
OpportunityRegionSummaryView	all properties	03	8.5
OpportunityRSMSummaryView	all properties	03	8.5
OpportunityStateSummaryView	all properties		8.5
OwnerView	all properties		8.5
PackageKitChildView	all properties		8.5
PackageKitChildView	ErpAccountingEntityId	03	
PackageKitChildView	ErpLogicalId	03	
PicklistActivelanguageview	all properties		8.5
PicklistitemBaselanguageview	all properties		8.5
PicklistitemLanguagemapview	all properties		8.5
PicklistitemLanguageview	all properties		8.5
PicklistItemView	all properties		8.5
PickListView	all properties		8.5
PicklstFlatview	all properties		8.5
PriceServiceMappingView	all properties		8.5
ProdPackageKitView	all properties		8.5
ProdPackageKitView	ErpAccountingEntityId	03	
ProdPackageKitView	ErpLogicalId	03	

Views	Property	8.4.x	8.5
ProductLocationView	AccountingPeriod	03	
ProductLocationView	ActiveFlag	03	
ProductLocationView	ActualId	03	
ProductLocationView	all properties	01	
ProductLocationView	all properties		8.5
ProductLocationView	AppId	03	
ProductLocationView	Classification	03	
ProductLocationView	Commissionable	03	
ProductLocationView	CommodityGroupId	03	
ProductLocationView	CommodityType	03	
ProductLocationView	DataOwner	03	
ProductLocationView	Description	03	
ProductLocationView	ErpAccountingEntityId	03	
ProductLocationView	ErpConfiguredItem	03	
ProductLocationView	ErpExtID	03	
ProductLocationView	ErpLocationId	03	
ProductLocationView	ErpLogicalId	03	
ProductLocationView	ErpStatus	03	
ProductLocationView	ErpUniqueId	03	
ProductLocationView	Family	03	
ProductLocationView	FixedCost	03	
ProductLocationView	GlAccountNumber	03	
ProductLocationView	GlSubAccountNumber	03	
ProductLocationView	GlobalSyncId	03	
ProductLocationView	LocationDescription	03	
ProductLocationView	LocationName	03	
ProductLocationView	Name	03	
ProductLocationView	Price	03	
ProductLocationView	ProductGroup	03	
ProductLocationView	ProductId	03	
ProductLocationView	SellingAllowedFlag	03	
ProductLocationView	SellingUOMId	03	
ProductLocationView	SellingUOMNumber	03	
ProductLocationView	SiteId	03	
ProductLocationView	Status	03	
ProductLocationView	StockItem	03	
ProductLocationView	StockVolume	03	
ProductLocationView	StockWeight	03	
ProductLocationView	Supplier	03	
ProductLocationView	Taxable	03	
ProductLocationView	Type	03	

Views	Property	8.4.x	8.5
ProductLocationView	Unit	03	
ProductLocationView	UnitOfMeasureId	03	
ProductLocationView	Vendor	03	
ProductLocationView	WarehouseLocation	03	
ProductMasterDataEnabledView	AccountingPeriod	03	
ProductMasterDataEnabledView	ActiveFlag	03	
ProductMasterDataEnabledView	ActualId	03	
ProductMasterDataEnabledView	all properties	01	
ProductMasterDataEnabledView	all properties		8.5
ProductMasterDataEnabledView	AppId	03	
ProductMasterDataEnabledView	Clasification	03	
ProductMasterDataEnabledView	Commissionable	03	
ProductMasterDataEnabledView	CommodityGroupId	03	
ProductMasterDataEnabledView	CommodityType	03	
ProductMasterDataEnabledView	DataOwner	03	
ProductMasterDataEnabledView	Description	03	
ProductMasterDataEnabledView	ErpAccountingEntityId	03	
ProductMasterDataEnabledView	ErpConfiguredItem	03	
ProductMasterDataEnabledView	ErpExtId	03	
ProductMasterDataEnabledView	ErpLogicalId	03	
ProductMasterDataEnabledView	ErpStatus	03	
ProductMasterDataEnabledView	ErpUniqueId	03	
ProductMasterDataEnabledView	Family	03	
ProductMasterDataEnabledView	FixedCost	03	
ProductMasterDataEnabledView	GlAccountNumber	03	
ProductMasterDataEnabledView	GlSubAccountNumber	03	
ProductMasterDataEnabledView	GlobalSyncId	03	
ProductMasterDataEnabledView	Name	03	
ProductMasterDataEnabledView	Price	03	
ProductMasterDataEnabledView	ProductGroup	03	
ProductMasterDataEnabledView	ProductId	03	
ProductMasterDataEnabledView	SellingAllowedFlag	03	
ProductMasterDataEnabledView	SellingUOMId	03	
ProductMasterDataEnabledView	SellingUOMNumber	03	
ProductMasterDataEnabledView	SiteId	03	
ProductMasterDataEnabledView	Status	03	
ProductMasterDataEnabledView	StockItem	03	
ProductMasterDataEnabledView	StockVolume	03	
ProductMasterDataEnabledView	StockWeight	03	
ProductMasterDataEnabledView	Supplier	03	
ProductMasterDataEnabledView	Taxable	03	
ProductMasterDataEnabledView	Type	03	

Views	Property	8.4.x	8.5
ProductMasterDataEnabledView	Unit	03	
ProductMasterDataEnabledView	UnitOfMeasureId	03	
ProductMasterDataEnabledView	Vendor	03	
ProductMasterDataEnabledView	WarehouseLocation	03	
SalesOrderSyncView	all properties		8.5
SalesQuotationSyncView	all properties		8.5
SyncLastDateView	all properties		8.5
TaskSyncView	all properties		8.5
UserIntegrationsView	all properties		8.5
VirtualFileSystemView			8.5
WorkflowPropertyView	all properties		8.5

Tables with no Corresponding Entity in the Entity Model

The following lists new tables or fields that do not correspond to an entity in the Entity model that have been added since in v8.4

Table	Property/Field	Read Only	8.4.x	8.5
BRANCHOPTIONS	SECUREGROUPS		04	
SESSIONSECTOKENCACHE			02	
SYSTEMINFO	COREVERSION		01,02 03,04	8.5
SYSTEMINFO	MODELVERSION		01,02 03,04	8.5
SYSTEMINFO	SNCVERSION		01,02 03,04	8.5
VFSDATA	all properties			8.5
VIRTUALFILESYSTEM	all properties			8.5

Inserted Records

The following lists entities with inserted records since in v8.4

Entity	8.4.x	8.5
BACKOFFICE	01	
BACKOFFICEACCTENTITY	04	
BODFIELDMAPPING	03	
BODMAPPING	03	
COUNTRYALIAS_DATA	01	
COUNTRYCODEMAPPING	01	
CUSTOMSETTINGS	01	
EXCHANGERATE	01	
FORECASTSUMMARY	03	

Entity	8.4.x	8.5
INTEGRATION	01	
INTEGRATIONRESOURCE		8.5
IONWORKFLOWDEFINITION	01	
IONWORKFLOWMAPPING	01	
JOINDATA	04	
LINKEDINCONFIGURATION	01	
MARKETOENTITYMAP	01	
MARKETOMAPFIELD	01	
PERIOD	01	
PROVIDER	01	
RESYNCTABLEDEFS		8.5
SECPROFILE	01	
SECTABLEDEFS		8.5
USEROPTIONDEF	04	
VIRTUALFILESYSTEM	02	

New or Updated Scripts

The following lists scriptes added or updated since in v8.4

Script Name	8.4.x	8.5
Global Script System: Keyword Search	01	
Global Script System: Opportunity Management (	01	
VBscript Opportunity: SLX OnOpen Opportunity Statistics Report	04	
VBscript System: ACI Support	01	
VBscript System: Notes History Common	01	
VBscript System: SLX Address Common	03	
VBscript System: SLX_Common	01	
VBscript System: SLX Crystal Report	03	
VBscript System:SLX_Export_Group_To_Excel	01	
VBscript System:SLX Lead Info	01	
VBscript System: SLX Report Controller	03	
VBscript System: Spell Check	01	

New or Updated Filters

The following lists filters added or updated since in v8.4

Entity	Filter	8.4.x	8.5
Activity	ActivityType	04	8.5
Activity	Attachment	04	8.5
Activity	AverageDaysPastDue		8.5
Activity	CountActivities		8.5
Activity	CountPastDue		8.5
Activity	CreateSource		8.5
Activity	Duration		8.5
Activity	From	04	
Activity	Leader		8.5
Activity	Notification	04	8.5
Activity	Recurring	04	8.5
Activity	StartDate	04	8.5
Activity	Ticket		8.5
Activity	Timeless	04	8.5
Activity	TotalDuration		8.5
ERPShipment	ActualShipDate	02	
ExchangeRate	ModifyDate		8.5
Forecast	Active	03	
Forecast	Amount	03	
Forecast	AmtRange	03	
Forecast	AssignedTo	03	
Forecast	BeginDate	03	
Forecast	EndDate	03	
Forecast	TotalAmount	03	
ForecastSummary	AccountManager	03	
ForecastSummary	Country	03	
ForecastSummary	Manager	03	
ForecastSummary	Product	03	
ForecastSummary	Region	03	
ForecastSummary	State	03	
GroupStatistics	Dev	01	
GroupStatistics	Shared	01	
Opportunity	Potential	02	
Opportunity	SumWeightedPotential	03	
Quota	Active	03	
Quota	Amount	03	
Quota	AssignedTo	03	
Quota	BeginDate	03	
Quota	TotalAmount	03	

Entity	Filter	8.4.x	8.5
Quote	GrandTotal	01	8.5
Quote	SumGrandTotal		8.5
SalesOrder	GrandTotal	01	8.5
SalesOrder	SumGrandTotal		8.5
SalesOrder	Account		8.5
SalesOrder	AccountManager		8.5

Create Indexes

The following lists indexes added since in v8.4

Index Name	8.4.x	8.5
ACTIVITYASSOCIATION.ACTIVITYASSOCIATION_ACTIVITYID	04	
ACTIVITYASSOCIATION.ACTIVITYASSOCIATION_ENTITYID	04	
BODFIELDMAPPING.BODFIELDMAPPING_BODMAPPINGID		8.5
DEFECT.DEFECT_ALTERNATEKEYPREFIX	03	
DEFECT.DEFECT_ALTERNATEKEYSUFFIX	03	
FORECAST.FORECAST_ASSIGNETOID	03	
FORECAST.FORECAST_PRIMARY	03	
FORECASTAUDIT.FORECASTAUDIT_FORECASTID	03	
FORECASTOPPORTUNITY.FORECASTOPPORTUNITY_FORECASTID	03	
FORECASTOPPORTUNITY.FORECASTOPPORTUNITY_OPPORTUNITYID	03	
FORECASTOPPORTUNITY.FORECASTOPPORTUNITY_PRIMARY	03	
FORECASTSNAPSHOT.FORECASTSNAPSHOT_FORECASTID	03	
FORECASTSNAPSHOT.FORECASTSNAPSHOT_PRIMARY	03	
FORECASTUDIT.FORECASTAUDIT_PRIMARY	03	
HISTORYASSOCIATION.HISTORYASSOCIATION_ENTITYID	04	
HISTORYASSOCIATION.HISTORYASSOCIATION_HISTORYID	04	
IONWORKFLOW.ENTITYID		8.5
IONWORKFLOWMAPPING.WORKFLOWDEFINITIONID		8.5
MARKETOLEAD.CONTACTID	02	
MARKETOLEAD.EMAIL	02	
MARKETOLEAD.LEADID	02	
MARKETOLEAD.MARKETOPERSON	02	
MARKETOLEADACTIVITY.LEADID	02	
MARKETOLEADACTIVITY.MARKETOACTIVITY	02	
MARKETOLEADACTIVITY.MARKETOLEAD	02	
PRODUCT.PRODUCT_ACTUALID	02	
PRODUCT.PRODUCT_NAME	02	
PRODUCT.PRODUCT_STATUS	02	
PRODUCTPROGRAM.PRODUCTPROGRAM_PRODUCTID	02	
QUOTA.QUOTA_QUOTAID_PK	03	

Index Name	8.4.x	8.5
QUOTA.QUOTA_USERID	03	
QUOTE.QUOTE_ALTERNATEKEYPREFIX	03	
QUOTE.QUOTE_ALTERNATEKEYSUFFIX	03	
SALESORDER.SALESORDER_ALTERNATEKEYPREFIX	03	
SALESORDER.SALESORDER_ALTERNATEKEYSUFFIX	03	
SICUSTOMER.SICUSTOMER_SICUSTOMERID_PK	01	
SIRATIONALE.SIRATIONALE_SIRATIONALEID_PK	01	
SIRECOMMENDATION.SIRECOMMENDATION_SIRECOMMENDATION_PK	01	
SYNCRESULT.SYNCRESULT_ACTION		8.5
SYSBODOUTOFORDERREF.IX_SYSBODOUTOFORDERREF_ENTITY1		8.5
SYSBODOUTOFORDERREF.IX_SYSBODOUTOFORDERREF_ENTITY2		8.5
TICKET.TICKET_ALTERNATEKEYPREFIX	03	
TICKET.TICKET_ALTERNATEKEYSUFFIX	03	
WORKFLOWSTEP.WORKFLOWDEFINITIONID		8.5
WORKFLOWSTEP.WORKFLOWSTEPID		8.5
WORKFLOWINSTANCE.WORKFLOWDEFINITIONID		8.5
WORKFLOWINSTANCE.WORKFLOWINSTANCENID		8.5
WORKFLOWSTEPINSTANCE.WORKFLOWINSTANCEID		8.5
WORKFLOWSTEPREVIEWERINSTANCE.WORKFLOWSTEPINSTANCEID		8.5
WORKFLOWINSTANCE.ENTITYID		8.5
WORKFLOWPROPERTY.WORKFLOWDEFINITIONID		8.5
WORKFLOWSTEP.NAME		8.5

New or Updated Events

The following lists events added or updated since in v8.4

Entity	Event	8.4.x	8.5
Address	OnAfterUpdate	03	
BOEPAMapping	OnAfterUpdate		8.5
BOEPAMapping	OnAfterDelete		8.5
Campaign	OnBeforeUpdate	04	
Contact	OnAfterUpdate	03	
CustomSetting	OnBeforeUpdate	01	
Defect	OnBeforeDelete	04	
DiscountChargeItem	OnBeforeInsert	04	8.5
DiscountChargeItem	OnBeforeUpdate		8.5
DiscountChargeItem	OnAfterUpdate		8.5
DiscountChargeItem	OnAfterInsert		8.5
Forecast	OnAfterDelete	03	
Forecast	OnAfterInsert	03	
Forecast	OnAfterUpdate	03	

Entity	Event	8.4.x	8.5
Forecast	OnBeforeDelete	03	
Forecast	OnBeforeInsert	03	
Forecast	OnBeforeUpdate	03	
Forecast	OnCreate	03	
ForecastAudit	OnAfterDelete	03	
ForecastAudit	OnAfterInsert	03	
ForecastAudit	OnAfterUpdate	03	
ForecastAudit	OnBeforeDelette	03	
ForecastAudit	OnBeforeInsert	03	
ForecastAudit	OnBeforeUpdate	03	
ForecastAudit	OnCreate	03	
ForecastOpportunity	OnAfterDelete	03	
ForecastOpportunity	OnAfterInsert	03	
ForecastOpportunity	OnAfterUpdate	03	
ForecastOpportunity	OnBeforeDelette	03	
ForecastOpportunity	OnBeforeInsert	03	
ForecastOpportunity	OnBeforeUpdate	03	
ForecastOpportunity	OnCreate	03	
ForecastSnapshot	OnAfterDelete	03	
ForecastSnapshot	OnAfterInsert	03	
ForecastSnapshot	OnAfterUpdate	03	
ForecastSnapshot	OnBeforeDelette	03	
ForecastSnapshot	OnBeforeInsert	03	
ForecastSnapshot	OnBeforeUpdate	03	
ForecastSnapshot	OnCreate	03	
GeoCodeProviderConfiguration	OnAfterUpdate	01	
History	OnAfterInsert	04	
IONWorkflowDefinition	OnBeforeInsert	01	
IONWorkflowDefinition	OnBeforeUpdate	01	
IONWorkflowMapping	OnBeforeInsert	01	
IONWorkflowMapping	OnBeforeUpdate	01	
Lead	OnAfterDelete	03	
Lead	OnAfterInsert	03	
Lead	OnAfterUpdate	03	
LeadAddress	OnAfterUpdate	03	
Opportunity	OnAfterUpdate	04	
Quota	OnAfterDelete	03	
Quota	OnAfterInsert	03	
Quota	OnAfterUpdate	03	
Quota	OnBeforeDelete	03	
Quota	OnBeforeInsert	03	

Entity	Event	8.4.x	8.5
Quota	OnBeforeUpdate	03	
Quota	OnCreate	03	
QuoteItem	OnCreate	03	
Ticket	OnBeforeDelete	04	
UserInfo	OnAfterUpdate	03	
UserIntegrationMap	OnBeforeInsert	03	
UserRole	OnAfterInsert	01	
WorkflowStepReviewerInstance	OnBeforeUpdate		8.5
WorkflowStepReviewerInstance	OnAfterUpdate		8.5
WorkflowStepReviewerInstance	OnAfterInsert		8.5

New or Updated Business Rules

The following lists business rules added or updated since in v8.4

Entity	Business Rules	8.4.x	8.5
Account	GetAccountsByGeocodeMashup	03	
Activity	EnsurePrimaryAssociations	04	
Activity	ExpandChildOccurrences	04	
Contact	CanChangeMarketoOwner	02	
CustomSetting	GetLocationFilterCondition	01	
CustomSetting	GetProductsFilterCondition	01	
CustomSetting	PercentOfQuota	03	
CustomSetting	PeriodClosedWonAmount	03	
CustomSetting	PeriodPipelineAmount	03	
CustomSetting	PeriodQuotaAmount	03	
CustomSetting	PullInOpportunities	03	
CustomSetting	SetEndDate	03	
CustomSetting	SetFormattedDescription	03	
CustomSetting	TakeSnapshot	03	
Forecast	PercentofQuota	04	
Forecast	PeriodClosedWonAmount	04	
Forecast	PeriodPipelineAmount	04	
Forecast	PeriodQuotaAmount	04	
Forecast	PullInOpportunities	04	
Forecast	SetEndDate	04	
Forecast	SetFormattedDescription	04	
Forecast	TakeSnapshot	04	
History	EnsurePrimaryAssociations	04	
IONWorkflowDefinition	CopyWorkflowDefinition	01	
IONWorkflowDefinition	RequestEntityPropertiesForWFStep		8.5
IONWorkflowDefinition	RemoveFromApprovers		8.5

Entity	Business Rules	8.4.x	8.5
IONWorkflowMapping	CopyIONWorkflowMappingRecord	01	
IONWorkflowMapping	CopyMultWorkflowMappings	01	
Lead	CanChangeMarketoOwner	02	8.5
Lead	MergeLead		8.5
OfficeProfile	GetLocaleConfig	04	8.5
OfficeProfile	GetPortalHelpUrl	04	8.5
OfficeProfile	UpdateLocaleConfig	04	8.5
OfficeProfile	UpdatePortalHelpUrl	04	8.5
Opportunity	GetOpportunityPIFilter	02	
Opportunity	GetOpportunityStatusMashup	01	
Quota	CopyQuota	03	
Quota	CopyQuotaForNextPeriod	03	
Quota	SetEndDate	03	
Quota	SetFormattedDescription	03	
Quote	RePriceQuoteOnShippingCharge	03	
SalesOrder	RePriceOrderOnShippingCharge	03	
User	ImportUser	02	

New or Updated Database Objects – .sxb bundle

The following lists .sxb bundle database objects added or updated since in v8.4.

	Database Object	8.4.x	8.5
	DB_OBJECTDEFINITION_DELETE_Duplicate_Ansi : Oracle(02)	02	
	DROP_DUPLICATE_PICKLISTITEMVIEW : Oracle(02)	02	
	DROP_DUPLICATE_PICKLISTVIEW : Oracle(02)	02	
	UPDATE BRANCHOPTIONS SET SECUREGROUPS = 'T' HERE SECUREGROUPS IS NULL	04	

New or Updated Database Objects – VFS bundle

The following lists VFS Action bundle database objects added or updated since in v8.4.

	Database Object	8.4.x	8.5
	ACCOUNT_INTEGRATION_CHANGE (MSSQL)	01	
	ACTIVITY_INT_INSTEAD_INS(MSSQL)	01	
	ACTIVITY_INTEGRATION_CHANGE (MSSQL)	01	
	ACTIVITY_INTEGRATION_INSERT (MSSQL)	01	
	ACTIVITYATTENDEE_INT_INSTEAD_INS (MSSQL)	01	
	ACTIVITYATTENDEE_INTEGRATION_CHANGE (MSSQL)	01	
	ADDRESS_INT_INSTEAD_INS (MSSQL)	01	
	ADDRESS_INTEGRATION_CHANGE (MSSQL)	01	

	Database Object	8.4.x	8.5
	ADDRESS_INTEGRATION_DELETE (MSSQL)	01	
	ADDRESS_INTEGRATION_INSERT (MSSQL)	01	
	ADHOCGROUP_AFTER_DELETE (Oracle)		8.5
	ADHOCGROUP_AFTER_INSERT (Oracle)		8.5
	ADHOCGROUP_INTEGRATION_INSERT (MSSQL)	01	8.5
	ADHOCGROUP_INTEGRATION_TOMBSTONE (MSSQL)	01	8.5
	Alter AccountAccountingEntity (MSSQL)	01	
	Alter AccountAccountingEntity (Oracle)	01	
	Alter BackOfficeMappingView (MSSQL)	01	
	Alter BackOfficeMappingView (Oracle)	01	
	BackOfficeMappingView (MSSQL)	04	
	BackOfficeMappingView (Oracle)	04	
	BodFieldMapping_Quote_ISACTIVE (All)	01	
	BRANCHOPTIONS_USECUSTOMERPORTALHELP_ USECUSTOMWEBHE(All)	01	
	BRANCHOPTIONS_USECUSTOMERPORTALHELP_ USECUSTOMWEBHELP (MSSQL)	01	
	CONTACT_INT_INSTEAD_INS (MSSQL)	01	
	CONTACT_INTEGRATION_CHANGE (MSSQL)	01	
	CONTACT_INTEGRATION_INSERT (MSSQL)	01	
	CONTACT_TOMBSTONE (MSSQL)	01	
	Create_Primary_Key_Clustered_For_ERPBillTo (MSSQL)	04	
	Create_Primary_Key_Clustered_For_ERPInvoice (MSSQL)	04	
	Create_Primary_Key_Clustered_For_ERPReceivable (MSSQL)	04	
	Create_Primary_Key_Clustered_For_ERPShipment (MSSQL)	04	
	Create_Primary_Key_Clustered_For_ERPShipTo (MSSQL)	04	
	Create_Primary_Key_Clustered_For_Quote (MSSQL)	04	
	CreateBackOfficeMappingViews(MSSQL)	01	
	CreateBackOfficeMappingViews(Oracle)	01	
	CreateBoeAckStatusDefinition(Oracle)	01	
	CRMREFIXFORROLES (All)	01	
	CustomSetting (All)	01	
	DATATYPE CHANGE FOR WORKFLOWSTEP_TOEMAILADDRESS (MSSQL)		8.5
	DATATYPE CHANGE FOR WORKFLOWSTEP_TOEMAILADDRESS (Oracle)		8.5
	Default Help Url (MSSQL)	01	
	Default Help Url (Oracle)	01	
	DefaultIncludeErpFreight	03	
	DeletePrimaryAddressOnly	01	
	Drop EXCHANGERATE_PK Index (Oracle)	02	
	ERPBILLTOINVOICEAGINGVIEW (MSSQL)	01	
	ERPBILLTOINVOICEAGINGVIEW (Oracle)	01	

	Database Object	8.4.x	8.5
	ERPINVOICEAGINGVIEW (MSSQL)	01	
	ERPINVOICEAGINGVIEW (Oracle)	01	
	ERPINVOICEVIEW (MSSQL)	01	
	ERPINVOICEVIEW (Oracle)	01	
	ERPSHIPTOINVOICEAGINGVIEW (MSSQL)	01	
	ERPSHIPTOINVOICEAGINGVIEW (Oracle)	01	
	ExchangeRate (All)	01	
	Fix DB_OBJECTDEFINITION OBJECTNAME Fields (All)	02	
	LEAD_AFTER_DELETE (Oracle)		8.5
	LEAD_BEFORE_CHANGES (Oracle)		8.5
	LEAD_BEFORE_CHANGES (Oracle)		8.5
	LEAD_INT_INSTEAD_INS (MSSQL)		8.5
	LEAD_INTEGRATION_CHANGE (MSSQL)		8.5
	LEAD_INTEGRATION_INSERT (MSSQL)		8.5
	LEAD_TOMBSTONE (MSSQL)		8.5
	LEADSYNCVIEW (MSSQL)		8.5
	LEADSYNCVIEW (Oracle)		8.5
	OPPORTUNITYACCOUNTMANAGERVIEW (MSSQL)	03	
	OPPORTUNITYACCOUNTMANAGERVIEW (Oracle)	03	
	OPPORTUNITYCOUNTRYSUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYCOUNTRYSUMMARYVIEW (Oracle)	03	
	OPPORTUNITYCOUNTRYVIEW (MSSQL)	03	
	OPPORTUNITYCOUNTRYVIEW (Oracle)	03	
	OPPORTUNITYDIRECTORSUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYDIRECTORSUMMARYVIEW (Oracle)	03	
	OPPORTUNITYDIRECTORVIEW (MSSQL)	03	
	OPPORTUNITYDIRECTORVIEW (Oracle)	03	
	OPPORTUNITYPRODUCTSUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYPRODUCTSUMMARYVIEW (Oracle)	03	
	OPPORTUNITYPRODUCTVIEW (MSSQL)	03	
	OPPORTUNITYPRODUCTVIEW (Oracle)	03	
	OPPORTUNITYREGIONSUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYREGIONSUMMARYVIEW (Oracle)	03	
	OPPORTUNITYREGIONVIEW (MSSQL)	03	
	OPPORTUNITYREGIONVIEW (Oracle)	03	
	OPPORTUNITYRSMSUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYRSMSUMMARYVIEW (Oracle)	03	
	OPPORTUNITYSTATESUMMARYVIEW (MSSQL)	03	
	OPPORTUNITYSTATESUMMARYVIEW (Oracle)	03	
	OPPORTUNITYSTATEVIEW (MSSQL)	03	
	OPPORTUNITYSTATEVIEW (Oracle)	03	

	Database Object	8.4.x	8.5
	PRODUCTLOCATIONVIEW (MSSQL)	01	
	PRODUCTLOCATIONVIEW (Oracle)	01	
	PRODUCTMASTERDATAENABLEDVIEW (MSSQL)	01	
	PRODUCTMASTERDATAENABLEDVIEW (Oracle)	01	
	QUOTEITEMSUMMARYVIEW (MSSQL)	03	
	Remove_FusionChart (All)		8.5
	Restrict the data for SESSIONSECTOKENCACHE (All)	03	
	RESYNCTABLEDEFS(All)	04	
	SECTABLEDEFS (All)	04	
	SESSIONSECTOKENCACHE (MSSQL)	02	
	SESSIONSECTOKENCACHE (Oracle)	02	
	SessionSecTokenCacheCountView (MSSQL)	02	
	SESSIONSECTOKENCACHECOUNTVIEW (Oracle)	02	
	SessionSecTokenCacheView (MSSQL)	02	
	SESSIONSECTOKENCACHEVIEW (Oracle)	02	
	SetFinancialSettingsDefaults	04	
	Update Outlook Sync Method (All)		8.5
	Update SecuredActionItem (MSSQL)	01	
	UPDATE.ERP.TABLES (MSSQL)		8.5
	UPDATE.ERP.TABLES (Oracle)		8.5
	UPDATE.LEAD.GLOBALSYNC (Oracle)		8.5
	UPDATE.LEAD.GLOBALSYNCID (MSSQL)		8.5
	Update_GlobalConfig_Path (All)		8.5
	Update_Picklist_ID (All)	02	
	Update_Product_ActualID (All)		8.5
	Update_SecTableDefs_ActivityOccurrenceStartDate (All)	04	
	Update_SecTableDefs_OpportunityCloseDate (All)	03	
	Update_SecTablesDefs_ActivityHistory (MSSQL)		8.5
	UpdateInforSorLocation (All)	01	
	UpdateLocalPricingCustomSettings (All)	04	
	UpdateSystemInfoCoreVersion (All)		8.5
	UpdateTenantCustomSetting (All)	03	
	UpdateWorkFlowType (All)	04	
	USERACTIVITY_INT_INSTEAD_INS (MSSQL)	01	
	USERACTIVITY_INTEGRATION_CHANGE (MSSQL)	01	
	USERACTIVITY_TOMBSTONE (MSSQL)	01	
	USERHIERARCHYVIEW (MSSQL)	03	
	USERHIERARCHYVIEW (Oracle)	03	
	UserIntegrationsView		8.5
	VIRTUALFILESYSTEM_UPPER (Oracle)	03	
	WORKFLOWPROPERTYVIEW (MSSQL)		8.5
	WORKFLOWPROPERTYVIEW (Oracle)		8.5

New or Updated Plugins

The following lists plugins added or updated since in v8.4

Plugin Name	8.4.x	8.5
[ACOGroup]: Contact: Duplicate Emails	04	
[ACOGroup]:Account:Duplicate Suspects	04	
[ACOGroup]:OPPORTUNITY:30-60DayForecast	03, 04	
[ACOGroup]:OPPORTUNITY:30DayForecast	03	
[ACOGroup]:OPPORTUNITY:61DayForecast	03	
[ACOGroup]:OPPORTUNITY:My Pipeline	01, 03	
DashboardPage System:My Dashboard	02	8.5
DashboardWidget System:Bar Chart	02	
DashboardWidget System:Funnel Chart		8.5
DashboardWidget System:Group List	01	
DashboardWidget System:Opportunity Forecast	03	
Group: Lead: Touched Leads	04	
Group: MARKETOSESSIONLOG:All Session Log Entries	01	
Group:ACTIVITY:Alarms	04	
Group:ACTIVITY:All Open	04	
Group:ACTIVITY:Confirmations	04	
Group:ACTIVITY:My Activities	04	
Group:ACTIVITY:Past Due	04	
Group:ACTIVITY:Unconfirmed	04	
Group:AREACATEGORYISSUE: All	01	
Group:AREACATEGORYISSUE: AreasWithoutCategories	02	
Group:AREACATEGORYISSUE: AreasWithoutIssues	02	
Group:AREACATEGORYISSUE: CategoriesWithoutIssues	01	
Group:CONTRACT:Active Contracts		8.5
Group:CONTRACT:All Contracts		8.5
Group:CONTRACT:Pending Expirations		8.5
Group:CUSTOMSETTINGS: All Custom Settings	03	8.5
Group:DEDUPRESULT:AllDeDupResults	01	
Group:DEFECTACTIVITYRATE:AllRates	01	
Group:ERPINVOICE:Open	01	
Group:ERPINVOICE:PartialPaid	01	
Group:ERPPERSON:ActivePersons	01	
Group:ERPPERSON:AllPersons	01	
Group:ERPPERSON:DeletedPersons	01	
Group:ERPPERSON:InactivePersons	01	
Group:ERPRECEIVABLE:All Receivables	01	
Group:ERPSHIPMENT:AllShipment	01	
Group:ERPSHIPMENT:MyShipments	01	
Group:EVENT:All Events	04	

Plugin Name	8.4.x	8.5
Group:EXCHANGERATE:All Exchange Rates	01	
Group:FORECAST: AllForecasts	03	
Group:FORECAST: MyForecasts	03	
Group:FORECASTSUMMARY: PipelineByCountry	03	
Group:FORECASTSUMMARY: PipelineByManager	03	
Group:FORECASTSUMMARY: PipelineByProduct	03	
Group:FORECASTSUMMARY: PipelineByRegion	03	
Group:FORECASTSUMMARY: PipelineByRSM	03	
Group:INTEGRATION:AllIntegrations	01	
Group:LITERATURE:All Literature Items		8.5
Group:LITREQUEST:All Open	01, 04	
Group:LITREQUEST:My Literature Requests	04	
Group:MARKETOLEAD: All Marketo Leads	01	
Group:pDEMOA00018Q: PipelineByCountry	03	
Group:PERIOD:All Periods	01	
Group:QUOTA: AllQuotas	03	
Group:QUOTA: MyQuotas	03	
Group:SYSBOEOUTBOUNDTXN:AllTransactions	04	
Group:TICKETACTIVITYRATE:AllTicketActivityRates	01	
Group:TICKETPROBLEMTYPE:All Standard Problems		8.5
Group:TICKETSOLUTIONTYPE:All Standard Resolutions		8.5
Group:WORKFLOWINSTANCE:Active CRM Workflows		8.5
Group:WORKFLOWINSTANCE:All CRM Workflows		8.5
Group:WORKFLOWINSTANCE:My CRM Workflows		8.5
Group:WORKFLOWINSTANCE:All CRM Workflows		8.5
Group:WORKFLOWSTEPINSTANCE:Active CRM Workflow Steps		8.5
Group:WORKFLOWINSTANCE:Active CRM Workflows		8.5
Main View: System: Lead Details	01	
ResponsiveDashboardPage: System:Sales		8.5
ResponsiveDashboardPage: System:My Dashboard		8.5
ResponsiveDashboardPage: System:Layouts		8.5

New or Updated Reports

The following lists new or added reports since in v8.4

Report Name	8.4.x	8.5
Account Detail	01	
History By Contact - Sample	01	
Open Opportunities By Account	01	
Open Opportunities Summary	01	
Opportunity Detail	02	

Report Name	8.4.x	8.5
Quotation	01	
Quote Detail	01	
Support Defect	01	
Support Ticket	01	

New or Updated Picklists

The following lists picklists added or updated since in v8.4

Picklist	8.4.x	8.5
Action Types	04	
Address Description (Account)	01	
ErpInvoiceStatus	01	
Forecast Status	03	
Frequencies	01	
Marketo Data Type	01	
Marketo Field Type	01	
Marketo Run Schedule	01	
Marketo Sales Insight Tab	01	
SyncStatus	01	

New or Updated Windows Forms

The following lists new forms added since in v8.4

Entity	Form Name	8.4.x	8.5
System	Account QBE Screen	01	
System	Add Edit Qualification Category	01	
System	Campaign Detail	01	
System	Insert Opportunity	01	
Sales Dashboard	Pipeline Status	01	
System	Ticket Detail	01	
System	Account Detail	01	
System	Add New Contact Account	02	
System	Contact Detail	01	
System	Lead Detail	01, 03	
Dashboard	Manage Dashboard Options	01	
System	Manage Targets	03	
Leads	Marketing	01	
System	Opportunity Management	01	
System	Opportunity Reseller	04	
System	Opportunity Statistics	01	
Sales Dashboard	Sales Dashboard Detail	01	

Entity	Form Name	8.4.x	8.5
System	SLX ReportManager View	03	
Contact	Web Access	01	

New or Updated Portal Pages

The following lists new forms added since in v8.4

Entity	Form Name	8.4.x	8.5
Account	AccountAssets	04	8.5
Account	AccountContacts	02	8.5
Account	AccountDetails	04	8.5
Account	AccountErpDetails	01, 04	8.5
Account	AccountMarketoDetails	01	
Account	AccountQuotes	01	
Account	AccountResponses	01	8.5
Account	ErpBillTos	04	
Account	ErpContactAssociation	03	8.5
Account	ErpShipTos	04	
Account	InsertAccount		8.5
AccountProduct	AddEditAccountProduct	04	
Activity	ActivitySummaryList	04	
BackOffice	BackOfficeCustomBOEPAService	01	
BackOffice	InsertBackOffice	03	
BODFieldMapping	AddEditBODFieldMapping	02	
BODMapping	InsertBODMapping	02	
BOEPAService	AddEditBOEPAService	02	8.5
BOEPAService	BOEPAServiceDetail	02	
Campaign	CampaignDetails	04	
Campaign	CampaignOpportunities		8.5
Campaign	CampaignProducts		8.5
Campaign	CampaignSummary	01	
Competitor	CompetitorDetails		8.5
Contact	ContactDetails	01	8.5
Contact	ContactExtendedDetails	01	
Contact	ContactLeadSources	04	8.5
Contact	ContactOpportunities		8.5
Contact	ContactResponses		8.5
Contact	ERPContactAccounts	02	
Contact	ErpContactAssociation	02	
Contact	ErpExtendedDetails	01	
Contact	InsertAccountContact		8.5
Contract	ContractCoveredAssets		8.5

Entity	Form Name	8.4.x	8.5
Contract	ContractDetail	01	
Contract	InsertContract	01	
CustomSetting	AddEditOBMCustomSettings	01	
CustomSetting	CustomSettingDetails	03	8.5
CustomSetting	InsertCustomSetting	02	8.5
Defect	DefectProducts		8.5
Defect	DefectReturns		8.5
Defect	DefectTickets		8.5
DefectActivityItem	AddEditDefectTask	01, 04	8.5
Department	DepartmentMembers		8.5
Department	DepartmentTeams		8.5
DiscountChargeItem	SOAddEditDiscountChargeItem		8.5
ERPBillTo	AddEditErpBillTo		8.5
ERPBillTo	ErpBillToContactAssociation		8.5
ERPBillTo	ErpBillToDetails	01	8.5
ERPInvoice	ErpInvoiceDiscountChargeItems		8.5
ERPInvoice	ErpInvoiceExtDetail	01	8.5
ERPInvoice	InvoiceBillShipAddress		8.5
ERPInvoiceItem	InvoiceItemDetail	01	8.5
ERPPayFrom	AddEditERPPayFrom		8.5
ERPPayFrom	ErpPayFromContacts		8.5
ERPPayFrom	ErpPayFromDetails	01	
ERPPerson	ErpInsertPerson		8.5
ERPPerson	ErpPersonDetails		8.5
ERPReceivable	ErpReceivableAddresses		8.5
ERPReceivable	ErpReceivableExtDetails	01	8.5
ERPReceivableItem	ErpReceivableItemDetails	01	8.5
ERPReturnProduct	ErpReturnProductDetails	01	8.5
ERPShipment	ErpShipmentAddress		8.5
ERPShipment	ErpShipmentExtDetail	01	8.5
ERPShipmentItem	ErpShipmentItemDetails	01	8.5
ERPShipTo	AddEditErpShipTo		8.5
ERPShipTo	ErpShipToContactAssociation		8.5
ERPShipTo	ErpShipToDetails	01	8.5
ExchangeRate	ExchangeRateDetails		8.5
ExchangeRate	ExchangeRatePeriod		8.5
ExchangeRate	InsertDatedExchangerate		8.5
ExchangeRate	InsertExchangeRate		8.5
Event	EventSummary	04	
Forecast	CRMWorkflowProperties	04	
Forecast	CRMWorkflowSteps	04	

Entity	Form Name	8.4.x	8.5
Forecast	CustomSettingDetails	03	
Forecast	ForecastAudit	03	
Forecast	ForecastDetails	03	
Forecast	ForecastOpportunities	03	
Forecast	ForecastSnapshots	03	
Forecast	ForecastWorksheet	03	8.5
Forecast	InsertForecast	03	
History	AddContactOrLeadNote		8.5
Integration	IntegrationBackOffices	01	
Integration	IntegrationContourAbout	01	
Integration	IntegrationDetail	01, 04	8.5
Integration	IntegrationGeocode	01, 04	
Integration	IntegrationIONWorkFlows	01, 04	
Integration	IntegrationUsers	01	
Integration	MarketoPartitions	02	
IntegrationConfigGroup	AddEditConfigGroup		8.5
IntegrationResource	EditIntegrationResource		8.5
IONWorkflow	ActiveIONWorkflows	01	
IONWorkflow	CRMWorkflowProperties	04	
IONWorkflow	CRMWorkflowSteps	04	
IONWorkflowDefinition	InsertIONWorkflowDefinition	01, 04	8.5
IONWorkflowDefintion	IONWorkflowDefinitionCopy	01, 04	
IONWorkflowDefintion	IONWorkFlowDetails	01, 04	8.5
IONWorkflowDefintion	IONWorkflowFieldMappings	01, 04	
IONWorkflowMapping	InsertIONWorkflowMapping	01	
IONWorkflowMapping	IONWorkflowMappingCopy	01	
IONWorkflowMapping	IONWorkflowMappingDetails.	01, 04	
Lead	LeadDetails	01	8.5
Lead	InsertLead		8.5
Lead	LeadExtendedDetails		8.5
Lead	LeadResponses		8.5
MarketoLead	MarketoLeadDetail	02	
MarketoPartition	MarketoPartitionDetail	02	
OfficeProfile	EmailSetup	04	
OfficeProfile	EnableDEXDialog	01	
OfficeProfile	FinancialSettings	03	
OfficeProfile	Groups	01, 04	
OfficeProfile	ManageCurrency	01	
OfficeProfile	OfficeProfileDetails		8.5
OfficeProfile	OfficeProfileSettings	01	
Opportunity	InsertOpportunity	02, 04	8.5

Entity	Form Name	8.4.x	8.5
Opportunity	OpportunityCampaigns		8.5
Opportunity	OpportunityClosedLost	01	
Opportunity	OpportunityClosedWon	01	
Opportunity	OpportunityCompetitors	04	8.5
Opportunity	OpportunityContacts		8.5
Opportunity	OpportunityDetails	02	8.5
Opportunity	OpportunityErpDetails	02	8.5
Opportunity	OpportunityProducts	01	8.5
Opportunity	OpportunityQuotes	04	8.5
OpportunityProduct	EditOpportunityProduct	02	
Owner	EditSecurityProfile	02	
Package	PackageDetails		8.5
Package	Products		8.5
Period	EditPeriods	01	
Period	PeriodExchangeRate	01	
Product	ProductDetails	01	
Quota	InsertQuota	03	
Quota	QuotaDetails	03	
Quote	EditQuoteDetail	03	
Quote	EditQuoteItem	01	
Quote	InsertQuote	01, 04	8.5
Quote	QuoteBillTo		8.5
Quote	QuoteDetails	01	
Quote	QuoteDiscountChargeItems	03	
Quote	QuoteErpDetails	01	8.5
Product	QuoteExtendedDetails		8.5
Quote	QuoteProducts	01	8.5
Quote	QuoteShipTo		8.5
Quote	QuoteSoldTo		8.5
QuoteItem	EditQuoteItem	03	
Return	ErpReturnAddresses		8.5
Return	ErpReturnDetails	01	8.5
Return	InsertReturn		8.5
Return	ReturnDefects		8.5
Return	ReturnDetails	01	
Return	ReturnExtendedDetails		8.5
Return	ReturnShipToDetail	01	8.5
Role	RoleActions	01	8.5
Role	RoleUsers	01	8.5
Sales Order	EditSalesOrderDetail	03	8.5
SalesOrder	InsertSalesOrder	01, 04	8.5

Entity	Form Name	8.4.x	8.5
SalesOrder	SalesOrderBillTo		8.5
SalesOrder	SalesOrderDetails	03	8.5
SalesOrder	SalesOrderDiscountChargeItems	03	
SalesOrder	SalesOrderDistributedTaxes	03	
SalesOrder	SalesOrderErpDetails	01	8.5
SalesOrder	SalesOrderExtendedDetails		8.5
SalesOrder	SalesOrderPayFrom		8.5
SalesOrder	SalesOrderProducts	01	8.5
SalesOrder	SalesOrderShipTo		8.5
SalesOrder	SalesOrderSoldTo	03	
SalesOrderItem	EditSalesOrderItem	01, 03	
SecuredAction	SecuredActionRoles	01	8.5
SlxLocation	ErpSlxLocationDetail		8.5
SyncJob	SyncHistory	01	
Team	TeamMembers		8.5
Ticket	InsertTicket		8.5
Ticket	TicketActivities	01, 04	
Ticket	TicketActivityParts	04	
Ticket	TicketAssets		8.5
Ticket	TicketDefects		8.5
Ticket	TicketDetails	04	8.5
TicketActivity	AddEditTicketActivity	01	
TicketActivity	TicketActivityItems	01	8.5
TicketProblemType	StandardResolutions		8.5
TicketSolutionType	StandardProblems		8.5
User	DepartmentMembership		8.5
User	OthersAccessToUserCal		8.5
User	TeamMembership		8.5
User	UserAccessToOthersCal		8.5
User	UserChangePassword	01	
User	UserEmployee		8.5
User	UserRoles		8.5
User	UserTeamMembers		8.5
User	UserTeamMembership		8.5
WorkflowInstance	WorkflowInstanceDetails		8.5
WorkflowInstance	WorkflowInstances		8.5
WorkflowInstance	WorkflowStepInstances		8.5
WorkflowStep	AddEditCRMWorkflowStep	04	8.5
WorkflowStepInstance	WorkflowStepInstanceDetail		8.5
WorkflowStepInstance	workflowStepInstanceNotification		8.5
WorkflowStepReviewerInstance	AddApproversOrObserver		8.5

Entity	Form Name	8.4.x	8.5
WorkflowStepReviewerInstance	ApproveOrDisApprovalComments		8.5
WorkflowStepReviewerInstance	WorkflowStepApprovers		8.5
WorkflowStepReviewerInstance	WorkflowStepComments		8.5
WorkflowStepReviewerInstance	WorkflowStepObserver		8.5

New or Updated Quick Forms

The following lists new or updated quick forms added since in v8.4

Form Name	8.4.x	8.5
InsertAssociationActionItem (Action Rendering Template)	01	
QFListBox (Control Rendering Template)	01	
QFSDataGide (Script Rendering Template)	01	
Web Form Template	01	

New or Updated Smart Parts

The following lists smart parts added or updated since in v8.4.

Portal	Page	SmartPart	8.4.x	8.5
SlxClient	Account Detail	ErpContactAssociation		8.5
SlxClient	Account Detail	MergeRecordsConfirmation (Custom)	01	
SlxClient	Account Detail	WorkflowInstances		8.5
SlxClient	Activity Group	LiveGroupViewer (Custom)	04	
SlxClient	Back Office Detail	AddEditBackOfficeAcctEntity	01	
SlxClient	Campaign Detail	ActivityList (Custom)	04	
SlxClient	Campaign Detail	NotesHistoryList (Custom)	04	
SlxClient	Contact Detail	MarketoSalesInsights (Custom)	01	
SlxClient	Contact Detail	MergeRecordsConfirmation (Custom)	01	
SlxClient	CRM Workflow	WorkflowInstanceDetails		8.5
SlxClient	CRM Workflow	LiveGroupViewer (Custom)		8.5
SlxClient	CRM Workflow	WorkflowStepInstance		8.5
SlxClient	CRM Workflow Step	AddApprovesOrObserver		8.5
SlxClient	CRM Workflow Step	ApproveOrDisApprovalComments		8.5
SlxClient	CRM Workflow Step	LiveGroupViewer (Custom)		8.5
SlxClient	CRM Workflow Step	WorkflowStepApprovers		8.5
SlxClient	CRM Workflow Step	WorkflowStepApprovers		8.5
SlxClient	CRM Workflow Step	WorkflowStepComments		8.5
SlxClient	CRM Workflow Step	WorkflowStepInstanceDetail		8.5
SlxClient	CRM Workflow Step	workflowStepInstanceNotification		8.5
SlxClient	CRM Workflow Step	WorkflowStepObserver		8.5
SlxClient	Dashboard	Dashboard(Custom)		8.5
SlxClient	Defect Detail	ActivityList (Custom)	04	

Portal	Page	SmartPart	8.4.x	8.5
SlxClient	Defect Detail	NotesHistoryList (Custom)	04	
SlxClient	Events	LiveGroupViewer (Custom)	04	
SlxClient	Forecast Detail	ForecastAudit	03	
SlxClient	Forecast Detail	ForecastDetails	03	
SlxClient	Forecast Detail	ForecastOpportunities	03	
SlxClient	Forecast Detail	ForecastSnapshots	03	
SlxClient	Forecast Detail	ForecastWorksheet	03	
SlxClient	Forecast Detail	LiveGroupViewer (Custom)	03	8.5
SlxClient	Forecast Summary	LiveGroupViewer (Custom)	03	
SlxClient	Insert Custom Setting	InsertCustomSetting		8.5
SlxClient	InsertForecast	InsertForecast	03	
SlxClient	InsertQuota	InsertQuota	03	
SlxClient	Integration Detail	IntegrationContourAbout	01	
SlxClient	Integration Detail	IntegrationIONWorkflows	04	
SlxClient	Integration Detail	IONWorkflowDefinitionCopy	01	
SlxClient	Integration Detail	MarketoPartitionDetail	02	
SlxClient	Integration Detail	MarketoPartitions	02	
SlxClient	ION Workflow Definition	IONWorkflowDefinitionCopy	01	
SlxClient	ION Workflow Definition	IONWorkflowMappingCopy	01	
SlxClient	ION Workflow Mapping	IONWorkflowMappingCopy	01	
SlxClient	Lead Detail	ActiveIONWorkflows	01	
SlxClient	Lead Detail	MarketoSalesInsights (Custom)	01	
SlxClient	Marketo Lead	MarketoInsightDashboard (Custom)	01	
SlxClient	Marketo Partition	LiveGroupViewer(Custom)	02	
SlxClient	Marketo Partition	MarketoPartitionDetail	02	
SlxClient	Office Profile	EmailSEtup	04	
SlxClient	Office Profile	OfficeProfileSettings	01	
SlxClient	OfficeProfile	FinancialSettings	03	
SlxClient	Opportunity Detail	ActiveIONWorkflows	01	
SlxClient	Opportunity Detail	WorkflowInstances		8.5
SlxClient	Quota	LiveGroupViewer (Custom)	03	8.5
SlxClient	Quota	QuotaDetails	03	
SlxClient	Quote Detail	ActiveIONWorkflows	01	
SlxClient	Quote Detail	ActivityList (Custom)	04	
SlxClient	Quote Detail	NotesHistoryList (Custom)	04	
SlxClient	Quote Detail	WorkflowInstances		8.5
SlxClient	Return Detail	ActivityList (Custom)	04	
SlxClient	Return Detail	NotesHistoryList (Custom)	04	
SlxClient	Sales Order Detail	ActiveIONWorkflows	01	
SlxClient	Sales Order Detail	ActivityList (Custom)	04	
SlxClient	Sales Order Detail	NotesHistoryList (Custom)	04	

Portal	Page	SmartPart	8.4.x	8.5
SlxClient	Sales Order Detail	WorkflowInstances		8.5
SlxClient	Swagger API Docs	SwaggerUI (Custom)	04	
SlxClient	Ticket Detail	NotesHistoryList (Custom)	04	
SlxClient	Workflow Definition	AddEditCRMWorkflowStep	04	
SlxClient	Workflow Definition	CRMWorkdlowSteps	04	
SlxClient	Workflow Definition	CRMWorkflowProperties	04	
SlxClient	Workflow Definition	IONWorkflowDefinitionCopy	04	
SlxClient	Workflow Definition	IONWorkFlowDetails	04	
SlxClient	Workflow Definition	IONWorkflowMappingCopy	04	
Infor CRM Customer Portal	SpeedSearch	CommonTasks	02	
Infor CRM Customer Portal	Task Pane	CommonTasks	01	

New or Updated Modules

The following lists modules added or updated since in v8.4.

Entity	Module	8.4.x	8.5
Activity Groups	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	04	
CRM Workflow	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule		8.5
CRM WorkflowStep	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule		8.5
Events	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	04	
Forecast Detail	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	03	
Forecast Summary	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	03	
MarketoPartition	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	02	
Quota Detail	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	04	

New or Updated Menus

The following lists menus added or updated since in v8.4

Context Menu	8.4.x	8.5
Forecast	03	
Quota	03	
Quote	03	
Sales Order	03	
Ticket	03	

New or Updated Navigation

The following lists navigation added or updated since in v8.4

Context Menu	8.4.x	8.5
Administration	04	
Marketing	04	8.5
Sales	03,04	8.5
Service	04	8.5
Support	04	8.5

New or Updated Context Menus

The following lists context menus added or updated since in v8.4

Context Menu	8.4.x	8.5
Activity	04	
Activity Group List Context Menu	04	
Calendar		8.5
Event	04	
Event List Group Context Menu	04	
Forecast	03	
Literature	04	
Quota	03	

New or Updated Tasklets

The following lists tasklets added or updated since in v8.4

Context Menu	8.4.x	8.5
ActivityGroupsTasks	04	
EventTasks	04	

Updated Configuration Files

The following lists configuration files updated since in v8.4.

Portal	Filename	Description	8.4.x	8.5
Infor CRM Customer Portal	appSettings.config			8.5
Infor CRM Customer Portal	web.config			8.5
Infor CRM Job Service	appSettings.config		02	
Infor CRM Job Service	log4net.config		02	
Infor CRM Job Service	tenant.config		01	
SData for Infor CRM Customer Portal	Web.config		01	
SData Integration Host	Web.config		01	8.5
SlxClient	appSettings.config		01	8.5
SlxClient	web.config		01	8.5

New or Updated Custom Settings

The following lists custom settings added or updated since in v8.4

Custom Setting	Description	8.4.x	8.5
GroupListBufferRows	The number of rows to keep ready on each side of the viewport area so that the user can perform local scrolling without seeing the grid being built. Increasing this number can improve perceived performance when the data is being retrieved over a slow network.	03	
GroupListFarOffRemoval	Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed. Setting to Infinity causes rows to never be removed.	03	
GroupListMaximumRowsPerPage	The maximum number of rows to request at one time.	03	
GroupListMinimumRowsPerPage	The minimum number of rows to request at one time.	03	
GroupListPagingDelay	Indicates the delay (in milliseconds) imposed upon paging method, to wait before paging in more data on scroll events. This can be increased to reduce client-side overhead or the number of requests sent to a server.	03	
GroupListPagingMethod	Method (from dgrid/util/misc) to use to either throttle or debounce requests. Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests. Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive.	03	
GroupSummaryBufferRows	The number of rows to keep ready on each side of the viewport area so that the user can perform local scrolling without seeing the grid being built. Increasing this number can improve perceived performance when the data is being retrieved over a slow network.	03	
GroupSummaryFarOffRemoval	Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed. Setting to Infinity causes rows to never be removed.	03	
GroupSummaryPagingDelay	Indicates the delay (in milliseconds) imposed upon pagingMethod, to wait before paging in more data on scroll	03	

Custom Setting	Description	8.4.x	8.5
	events. This can be increased to reduce client-side overhead or the number of requests sent to a server.		
GroupSummaryPagingMethod	Method (from dgrid/util/misc) to use to either throttle or debounce requests. Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests. Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive.	03	
Read Only Quote On Promotion (Back Office Extension)	Set to True to prevent the modification of quotes for host systems like CSD, which do not support the promotion of updated CRM Quote content.	03	
Block Quote For Non-Promoted Records (Back Office Extension)	Set to True to prevent the promotion of new quotes for host systems like CSD, which do not support the promotion of CRM quote content.	03	
Block Quote For Promoted Records (Back Office Extension)	Set to True to prevent the promotion of updated quote content for host systems like CSD, which do not support the promotion of updated CRM quote content.	03	
Read Only Sales Order On Promotion (Back Office Extension)	Set to True prevents the modification of promoted sales order content for host systems like CSD, which do not support the promotion of updated CRM Sales Order content.	03	
Block Sales Order For Promoted Records (Back Office Extension)	Set to True prevents the promotion of modified sales order content for host systems like CSD, which do not support the promotion of updated Infor CRM Sales Orders.	03	
Display snapshot shipping summary (Back Office Extension)	Set to True to display Shipping information in the Sales Order snapshot. The default value is False.	03	
Include ERP Freight Rates (Back Office Extension)	Set to False to disable the CSD Freight Rate Shopping functionality for Infor CRM based Sales Orders. The default value is True.	03	
Freight Reason Code (Back Office Extension)	Implementation-specific distributed charge freight reason code corresponding to the CSD-based CRM Freight Addon reason code.	03	
Contact Account Management Enabled (Back Office Extension)	When enabled, this custom setting instructs the inbound processor to	02	

Custom Setting	Description	8.4.x	8.5
	cascade changes to the account's account manager to the account's related contacts.		
Publish All Addresses (Back Office Extension)	When enabled, this custom setting allows the outbound processor to publish multiple addresses. To publish only the primary address this custom setting must be set to False.	02	
Integrated Primary Contact indicator (Back Office Extension)	The Primary contact indicator is no longer displayed on the Contact details page if your administrator has enabled "Integrated Primary Contact Indicator" in the Back Office Extension, Options tab. The new primary contact flag may be observed in the Contact, Account Associations tab or in the Account, Contact Associations tab. Changes to the primary contact must be made in the Account, Contacts Associations tab grid.	02	
Complete Exchange Appointments (Sync for Exchange)	This setting is disabled by default, but when enabled synchronizes all completed appointment between Infor CRM and Exchange.	02	
Notify Members of Completion (Sync for Exchange)	Updated to be disabled by default. When enabled, activity members are notified when an activity is completed.	02	
ShowUserIDOOnHistoryChange	Displays both the UserID and name on separate lines for both Account Manager and Owner changes for database changes.		8.5

New or Updated Roles

The following lists roles updated or added since in v8.4

Role	Description	8.4.x	8.5
Administrator	Allows add, edit, and delete permissions to administration functions and edit permission for quick forms in the Web Form Designer.	01	
Contour	Allows access to Contour maps features.	01	
CRM-Marketo User	Allows access to Marketo features.	01	
Order and Quote Processor	Allows add and view permissions to contacts and accounts and add, edit, and delete permissions to sales orders.	01	
Quotas & Forecasting	Allows users to view quotas and view and manage forecasts.	03	
Quota Management	Allows users to create and manage quotas.	03	
Standard User	Allows view, add, edit, and delete permissions to Web Client non-administrative entities. Updated to include	01	

Updated or New Secured Actions

The following lists secured actions added or updated since in v8.4

Secure Action	Description	8.4.x	8.5
Administration/GroupManager/Groups/ToggleUserDefault		01	
Administration/SwaggerAPI/View	Allows the user to access the SwaggerAPI view.	04	
Entities/Account/PrometetoMarketo		01	
Entities/Account/DeleteFromMarketo		01	
Entities/ExchangeRate/View		01	
Entities/Forecast/Add	Allows the user to add forecast records. This secured action is automatically included in the Quotas & Forecasting role.	03	
Entities/Forecast/Delete	Allows the user to delete forecast records. This secured action is automatically included in the Quotas & Forecasting role.	03	
Entities/Forecast/Edit	Allows the user to edit forecast records. This secured action is automatically included in the Quotas & Forecasting role.	03	
Entities/Forecast/View	Allows the user to access forecast views and records. This secured action is automatically included in the Quotas & Forecasting role.	03	
Entities/JobManager/ViewAllExecutions		01	
Entities/JobManager/ViewAllTriggers		01	
Entities/Lead/CancelIONWorkflow		01	
Entities/Lead/InitiateWorkflow		01	
Entities/MarketoLeads/View		01	
Entities/MarketoSessionLog/View		01	
Entities/Opportunity/CancelIONWorkflow		01	
Entities/Opportunity/ConvertToQuote		01	
Entities/Opportunity/DeleteFromMarketo		01	
Entities/Opportunity/Import		01	
Entities/Opportunity/InitiateWorkflow		01	
Entities/Opportunity/Promote		01	
Entities/Opportunity/PromoteToMarketo		01	
Entities/Opportunity/RePriceOpportunity		01	
Entities/Period/DatedExchangeRate/View		01	
Entities/Period/ModifyPeriod		01	
Entities/Quota/Add	Allows the user to add quota	03	

Secure Action	Description	8.4.x	8.5
	records. This secured action is automatically included in the Quota Management role.		
Entities/Quota/Delete	Allows the user to delete quota records. This secured action is automatically included in the Quota Management role.	03	
Entities/Quota/Edit	Allows the user to edit quota records. This secured action is automatically included in the Quota Management role.	03	
Entities/Quota/View	Allows the user to access quota views and records. This secured action is automatically included in the Quotas & Forecasting and Quota Management roles.	03	
Entities/Quote/CancelIONWorkflow		01	
Entities/Quote/EditShippingCharge (Back Office Extension)	Allows the user to override the shipping charge. This secured action is automatically included in the Standard User and Order and Quote Processor roles.	03	
Entities/Quote/Initiate/Workflow		01	
Entities/Quote/GetOrderTotal		01	
Entities/Quote/OverridePricing (Back Office Extension)	Allow the user to override the adjusted Quote unit price when editing a product. This secured action is automatically included in the Standard User and Order and Quote Processor roles.	03	
Entities/Quote/RePriceQuote		01	
Entities/Role/Promote		01	
Entities/SalesOrder/CancelIONWorkflow		01	
Entities/SalesOrder/EditShippingCharge (Back Office Extension)	Allows the user to override the shipping charge. This secured action is automatically included in the Standard User and Order and Quote Processor roles.	03	
Entities/SalesOrder/GetOrderTotal		01	
Entities/SalesOrder/InitiateWorkflow		01	
Entities/SalesOrder/OverridePricing	Allows the user to override the adjusted Sales Order unit	03	

Secure Action	Description	8.4.x	8.5
(Back Office Extension)	price when editing a product. This secured action is automatically included in the Standard User and Order and Quote Processor roles.		
Entities/SalesOrder/RePriceOrder		01	
Entities/Ticket/Import		01	
Entities/WorkflowStepReviewerInstance/Add			8.5
Entities/WorkflowStepReviewerInstance/Delete			8.5

Deprecated Items

The following lists items deprecated since in v8.4:

- [Breaking Change] The ActivityManager.aspx form has been removed from the Web Client, was replaced by Activity.aspx (8.5)
- Discontinued the support of subqueries. (8.4.0.04)
  New out-of-the-box query parameters replace subqueries.
- Removed the following orphaned methods from the Entity Model (8.5):

  SalesLogix Application Entities

  - Backoffice/QuickForms
    - BackOfficeCustomMappings.QFButton_OnClick.method.xml
    - InsertBackOffice.txtBackOfficeName_OnChange.method.xml
  - BODMapping/QuickForms
    - BODMappingFieldMappings.btnAdd_OnClick.method.xml
  - BOEPAMapping/QuickForms
    - BOEPAMappingDetail.btnSave_OnClick.method.xml
  - BOEPAService/QuickForms
    - AddEditBOEPAService.cboAuthType_OnChange.method.xml
    - BOEPAServiceDetail.btnClone_OnClick.method.xml
    - BOEPAServiceDetail.tbrButtonValidate_OnClick.method.xml
  - Competitor/QuickForms
    - CompetitorDetails.lueAccount_Onchange.method.xml
  - Contact/QuickForms
    - InsertAccountContact.QFSLXLookup_OnChange.method.xml
  - Contact
    - GetMailMergeTemplates.method.xml
  - CustomSetting/QuickForms
    - AddEditEQConfigurations.tbr.Save_OnClick.method.xml
    - CustomSettingDetails.pklDataType_OnChange.method.xml
  - DefectActivityItem/QuickForms
    - AddEditDefectTask.cmdOK_OnClick.method.xml
  - DiscountChargeItem/Quickforms

- AddEditDiscountChargeItem.OnLoad1.method.xml
- QuoteAddEditDiscountChargeItem.OnLoad1.method.xml
- QuoteAddEditDistributedTax.OnLoad1.method.xml
- SOAddEditDiscountChargeItem.OnLoad1.method.xml

- ERPBillTo/QuickForms
  - AddEditERPBillTo.QFButton2_OnClick.method.xml
- ERPShipTo/QuickForms
  - ErpShipToShipments.tbrButton_OnClick.method.xml
- EXCHANGERATE/QuickForms
  - InsertExchangeRate.btnSave0_OnClick.method.xml
- Integration/QuickForms
  - IntegrationDetail.OnLoad1.method.xml
  - IntegrationLinks.btnAuthorize_OnClick.method.xml
  - ProviderScopes.OnLoad1.method.xml
- IONWorkflowDefinition/QuickForms
  - CRMWorkflowSteps.tbrButton_Onclick.method.xml
  - IONWorkFlowDetail.OnLoad1.method.xml
- Leads
  - GetImportTemplates.method.xml
- Opportunity/QuickForms
  - InsertOpportunity.SetupIntegrationContract.method.xml
  - OpportunityDetails.luePriceList_OnChange.method.xml
  - OpportunityDetails.SetupIntegrationContract.method.xml
- OpportunityProduct/QuickForms
  - EditOpportunityProduct.QFSLXCurrency_OnChange.method.xml
- Place/QuickForms
  - PlaceDetail.tbrButton_Onclick.method.xml
- Product/QuickForms
  - ProductDetails.OnLoad.method.xml
- Quote/QuickForms
  - EditQuoteDetail.OnLoad1.method.xml
  - QuoteBillTo.lueBillToContact_OnChangeAction.method.xml
  - QuoteExtendedDetails.OnLoad1.method.xml
  - QuoteProducts.btnAddCustomProduct_OnClick.method.xml
  - QuoteProducts.OnLoad1.method.xml
- QuoteItem/QuickForms
  - EditQuoteitem.btnOK_OnClick.method.xml
- Return/QuickForms
  - ReturnDetails.OnLoad1.method.xml
- SalesOrder/QuickForms

- InsertSalesOrder.btnSaveNew_OnClick.method.xml
- SalesOrderDetails.btnSaveSalesOrder_OnClick.method.xml
- SalesOrderProducts.btnAddCustomProduct_OnClick.method.xml
- SalesOrderProduct.OnLoad1.method.xml
- SalesOrderProduct.OnLoadHandler.method.xml

- SalesOrderItem/QuickForms
  - EditSalesOrderItem.btnOK_OnClick.method.xml
  - EditSalesOrderItem.OnFormLoad.method.xml
- WorkflowStep/QuickForms
  - AddEditCRMWorkflowStep.btnOK_OnClick.method.xml
- WorkflowStepInstance/QuickForms
  - WorkflowStopInstanceDetail.OnLoad1.method.xml
- WorkflowStepReviewerInstance/QuickForms
  - WorkflowStepApprovers.btnAdd_OnClick.method.xml
  - WorkflowStepComments.btnApprove_OnClick.method.xml
  - WorkflowStepComments.btnComments_OnClick.lmethod.xml

SalesLogix Contract Sync Entities

- AppIdMapping/QuickForms
  - AddEditAccountingSystem.OnLoad1.method.xml
  - EndPoints.btnInsert_OnClick.method.xml
- SyncResult/QuickForms
  - SyncResultDetail.QFButton_OnClick.method.xml
- SalesLogix Security SupportUser/QuickForms
  - DepartmentMembership.QFButton_OnClick.method.xml
  - UserDetails.btnSave_Onclick.method.xml
- Saleslogix System Support/OfficeProfile/QuickForms
  - EnableDEXDialog.btnCancel_OnClick.method.xml
  - EnableDEXDialog.QFButton_Onclick.method.xml
  - FinancialSettings.cbxFiscalyearStart_OnChange.method.xml
  - FinancialSettings.OnLoad1.method.xml
  - ManageCurrency.chkEnableDatedExRates_OnChange.method.xml
  - ManageCurrency.tbrSave_OnClick.method.xml