



Applying Web Core Update 04 for Version 8.3

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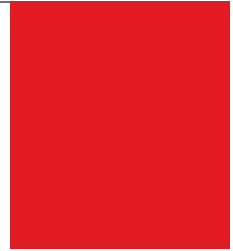
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Infor CRM is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation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

About this guide

This document describes Web Core Update 04 for Infor CRM version 8.3.

Prerequisites

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

- Infor CRM version 8.3
- 8.3 SNC Update 04



Do not install Web Core Update 04 for Infor CRM 8.3 on any other Infor CRM version.



Web Core Updates are cumulative. You do not need to install earlier Web Core updates before installing Web Core Update 04.

Additional considerations

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

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- Contour feature requires the following updates:
 - SNC Update 04 for Infor CRM version 8.3
 - Core Update 04 for Infor CRM version 8.3
 - Model Update 04 for Infor CRM version 8.3
 - If your installation includes the Proximity Search third-party product by Xtiva, and you will be converting to Infor's Contour feature, do the following before installing Infor CRM v8.3 Update 04:
 - Stop the Windows Task that was created as part of Proximity Search and delete the task.
If the task is not stopped, it may continue to geocode during the upgrade, which may result in some inaccurate data. If the Windows task is still running after the upgrade, it will impede the Infor Job Manager from geocoding for Contour.

Contacting Infor

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

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

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

Chapter 1

Changes in this Update

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

Features added in this update

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

Web Client

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

New Features added in previous updates

Web Core Updates are cumulative, so Web Core Update 04 for Infor CRM8.3 contains features released in previous updates.

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

Web Client

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

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

Web Client

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

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

Web Client

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

Application Architect

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



See the “What’s New in this Release” topic in the online Help systems for more information about the new features.

Issues fixed in this update

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



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

Defect	Description
INFORCRM - 5932	Calculated fields added through the Web Client do not display in Query Builder.
INFORCRM - 9235	(ICBOE) If the Contact BOD does not contain data in the Phone and Fax fields, then the fields should be cleared in the Contact Detail view.
INFORCRM - 10470	Address security vulnerabilities when uploading an attachment.
INFORCRM - 10539	Phone numbers do not retain the correct format.
INFORCRM - 10613	Address control does not display as expected when a Style Scheme is set and either Read Only is True or Enabled is False.
INFORCRM - 11049	When the "Save attachments with e-mail messages (MSG format)" option is selected in Administrator, dragging and dropping an email does not save any attachments.
INFORCRM - 11399	(ICBOE) When ICBOE is installed, using the Realign Territories tool orphans the SECCODEID in the ERP tables.
INFORCRM - 11400	When using a touchscreen, Internet Explorer freezes when navigating between tabs and controls.
INFORCRM - 11621	After making an exception of one of the occurrences of a recurring appointment in Microsoft Outlook and then synchronizing, the first occurrence of the activity disappears.
INFORCRM - 11664	(ICBOE) Sync BODs with special characters are failing to update in Infor CRM.
INFORCRM - 11863	Removing a user from the User's Calendar tab removes the last entry in the list instead of the selected record.
INFORCRM - 11931	Dragging and dropping emails to the Ticket Activity tab does not automatically refresh the tab.
INFORCRM - 11968	In a localized environment, the Sync History List view common Tasks labels are not translated.
INFORCRM - 11987	Converting a quote that is linked with an opportunity to a sales order is also copying the products from the opportunity.
INFORCRM - 12038	Department names that contain an ampersand cause errors.
INFORCRM - 12040	Bundle by difference does not recognize updates to the OnBeforeInsert.method.xml files for Quotes and Sales Orders.
INFORCRM - 12144	Unnecessary security joins in user filter cause performance issues.

Defect	Description
INFORCRM - 12145	Filters that use the SixRoles and SixTeams magic ranges cause performance issues.
INFORCRM - 12146	Optimize range filters with single English character ranges with GROUP BY condition.
INFORCRM - 12161	Queries used to generate filters consume a lot of resources.
INFORCRM - 12278	On the Activities view, the Next Month filter does not return any results.
INFORCRM - 12285	If the .NET framework calls a static constructor that fails on the first attempt, then the class is considered to be uninitialized which results in an exception in the ActivityRequestHandler and causes the web site to stop working for all users.
INFORCRM - 12363	(ICBOE) The Verb and BodType must be set in ProcessOutboundTxn before the call to the OutboundHandler.
INFORCRM- 12501	After upgrading to 8.3.0.3, the sync worker job fails to run.
INFORCRM - 12537	In Query Builder newly-added local joins do not display in the tree view.
INFORCRM - 12599	(ICBOE) Updating document pricing on opportunity and opportunity product records may not use the correct exchange rate.
INFORCRM - 12750	The database update schema Unicode memo should be ignored for column size alter statements.
INFORCRM - 12788	Adding or removing records from ad hoc groups should update the group plugin ModifyDate.
INFORCRM - 12818	The Job Service does not generate an exception when the database schema is missing a required field.

Issues fixed in previous updates

Web Core Updates are cumulative, so Web Core Update 04 for Infor CRM 8.3 contains fixes released in previous updates.

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



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

Defect	Description
INFORCRM - 5022	The Group Manager right click menu contains duplicate options.
INFORCRM - 5096	In a Chinese environment, no records are returned when looking for a lead source from the Contact Detail view.
INFORCRM - 8777	Using Update Targets to change the Initial Target results in the error "Specified cast is not valid."
INFORCRM - 8815	In Security Manager view, selected option buttons do not display correctly.
INFORCRM - 9437	An account with a contact role is not removing the contact roles when same account with no contact roles is published.
INFORCRM - 9451	(ICBOE) Creating a new quote, or sales order should inherit the default warehouse from the associated account.
INFORCRM - 9492	In Query Builder, moving conditions changes Or conditions to And.
INFORCRM - 10378	In a Spanish environment, currency code and number controls do not update properly.

Defect	Description
INFORCRM - 11017	When Multi-currency is configured Opportunity Statistics do not display currency correctly.
INFORCRM - 11067	In Application Architect, the IsEditable property on a grid cannot be edited.
INFORCRM - 11159	Clicking Refresh Pricing should display an error message if the Price and Availability service is not available.
INFORCRM - 11178	(ICBOE) Inbound BOD processing inherits the numeric parsing setting of the host server's Region and Language settings.
INFORCRM - 11185	(ICBOE) An outbound BOD is generated without promoting an opportunity when Outbound on Create is set to user triggered.
INFORCRM - 11190	After selecting a picklist field cannot tab into the combo box text to select a value.
INFORCRM - 11200	In an Offline Web Client environment the following error displays "The following SData diagnosis occurred: Description=Operation failed. Message=Invalid column name 'Filter'. HTTP status: Internal Server Error (500)."
INFORCRM - 11203	In an Oracle environment, quotes and sales orders with an ERP Status of "Deleted" are not updating.
INFORCRM - 11260	Xbar is consuming, but not releasing licenses.
INFORCRM - 11277	Xbar consumes a license which causes an incorrect count in the remaining license pool.
INFORCRM - 11344	The Update Potential Matches dialog box is missing a scrollbar.
INFORCRM - 11407	When a database has 2,600 or more users Group Manager takes minutes to load and produces long-running script errors.
INFORCRM - 11409	Account Manager ID fields formatted as "User Name" display the wrong user name.
INFORCRM - 11524	When an occurrence of a recurring activity is completed in Infor CRM, notifications are sent to Exchange for up to seven days.
INFORCRM - 11540	There needs to be a way to remove bad records form the Sync Digest table.
INFORCRM - 11617	The Back Office Extension option for Numeric Culture needs to be added to the Web Client help.
INFORCRM - 11768	The Share Group Window does not accurately display to whom a group is shared.
INFORCRM - 11769	Sharing a group to a new user or team causes the group to no longer be shared to previous users or teams.
INFORCRM - 11801	In the Application Architect Bundle Manager, adding bundle actions Create Field or Drop Field displays error 'Must declare the scalar variable "@TableName".'

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



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

Defect	Description
INFORCRM - 5115	In a localized environment, changing the Opportunity status to Closed-Won should cause "Opportunity Closed" to display.
INFORCRM - 5179	During Daylight Saving Time, recurring activities start date is an hour later than it is scheduled to start.

Defect	Description
INFORCRM - 5773	When the Ticket detail view Journal tab is in the More Tab and the More Tabs tab is dragged to middle pane, the Journal tab overlaps the other tabs.
INFORCRM - 6265	In the Entity Manager Filters tab, adding a filter and clicking OK does not display a prompt as expected.
INFORCRM - 6655	On a detail view, the first record in the Group List is not responsive after selecting a different record from the Recently Viewed list and then selecting the first record from the Group List.
INFORCRM - 6657	On change events run every time you click date controls added to a form preventing users from changing the date.
INFORCRM - 6664	When performing an Update from a list view, users are unable to use the Tab key to access pick list controls.
INFORCRM - 6668	Cannot save attachments with a "+" symbol in the file name.
INFORCRM - 6720	Default Lookup Condition option applies when adding the first condition to a lookup, but is ignored for any additional conditions.
INFORCRM - 7594	Look up controls defined with prefilters do not produce filtered results.
INFORCRM - 7746	Changes made via styleschema do not work with complex controls.
INFORCRM - 7941	In the Sync History list view, sorting the Error Message column causes an error.
INFORCRM - 8003	After editing an existing Pick List item users cannot update the associated Pick list field.
INFORCRM - 8092	Dragging an e-mail from Microsoft Outlook and dropping it on a Notes/History tab records the history item with the current date and time instead of the original date and time.
INFORCRM - 8206	Update Potential Matches will not return accounts with an account name that contains a single number, spaces, or several small words.
INFORCRM - 8609	Use a centralized caching infrastructure in AppldMappingService instead of a private dictionary.
INFORCRM - 8974	In a CPQ environment, the Warehouse link on the Sales Order and Quote Detail view Products tab should be disabled for configurable products.
INFORCRM - 9534	When a custom ticket group that contains the TICKETASSIGNLIST field as a condition is shared to Everyone, any user other than Admin will receive an error when viewing the group.
INFORCRM - 9670	If an attachment file name contains multiple periods, then the attachment description is truncated.
INFORCRM - 9710	When performing a Ticket Lookup based on the CreateUser, the lookup will only return up to 100 named users.
INFORCRM - 9734	On the Back Office detail view Price Services tab, an error occurs when the Valid End Point button is clicked.
INFORCRM - 9815	On the Quote detail view Products tab, changing the quantity of a product has no effect on the Extended Price (Quote) field.
INFORCRM - 9820	In Opportunity Statistics the Weighted Potential Total (Average) is miscalculated.
INFORCRM - 9847	In a localized environment, the Quote detail view Status is blank.
INFORCRM - 9851	In a localized environment, the Copy Quote Status is blank.
INFORCRM - 9888	Copy User Profile does not work when the Job Server has Process Isolation mode enabled.

Defect	Description
INFORCRM - 9896	Provide a task to refresh prices for quote and sales order products that use a price and availability service.
INFORCRM - 9961	Customization bundles that contain a picklist from version 8.2 cause an install error.
INFORCRM - 9991	An unexpected error in ExecuteMailMerge() occurs when running Mail Merge from within a Sales Process.
INFORCRM - 9999	Converting a quote to a sales order should copy the Payment Terms, Requested By, Carrier, Comments (both header and line), and Customer RFQ in addition to the information that is currently copied.
INFORCRM-10000	The Promote and Get Order Total options should not be available on the detail views of closed quotes and sales orders.
INFORCRM-10001	Promoted quotes and sales orders should no longer be editable.
INFORCRM-10008	Price and availability service should include updated values in the product grid.
INFORCRM-10020	When Outbound on Delete is disabled and a user tries to delete line items, a message should display informing the user that Outbound on Delete is disabled.
INFORCRM-10052	(ICBOE) During the initial load of data from the ERP system the process that updates the SYSINBOXSTATUS table and the IOBOX flag that indicates a record was processed can fail with a query timed out error.
INFORCRM-10061	The Application Architect status bar does not show the logged in user.
INFORCRM-10068	When the job service is restarted, it should trigger new jobs for jobs that were in process during the restart or crashed.
INFORCRM-10069	(ICBOE) Line items without an ERP Line number should be deleted.
INFORCRM-10073	A standard user cannot change currency for quotes and sales orders.
INFORCRM-10103	Check for existing should be filtering by ObjectName, DBType, and Encoding. That is the unique index on the table.
INFORCRM-10108	(ICBOE) The ERP status should be populated with Approved or Disapproved when the Sync Quote BOD is published.
INFORCRM-10118	(ICBOE) The ValidateCountryCode in the ERPShipmentAddress BOD should point to IERPReceivableAddress instead of IERPShipmentAddress.
INFORCRM-10157	The Entity Manager detail view does not display.
INFORCRM-10162	In a German environment, account names are corrupted in the Add Note dialog box.
INFORCRM-10200	(ICBOE) In an M3 integration: the old Unit of Measure is displayed in UOMs list even when SyncItemMaster BOD included an updated UOM code.
INFORCRM-10209	If the First Day of the Week is set to Monday and an activity is scheduled for a Sunday which is the 8th day of the month, the activity will not display on the Calendar.
INFORCRM-10211	When adding a target to a campaign Lead Source cannot be edited.
INFORCRM-10244	(ICBOE) Custom products should not generate a price and availability request.
INFORCRM-10288	Web Client does not function on Chrome version 51.
INFORCRM-10382	(ICBOE) Inbound transactions should be processed when the Outbound txn for that noun does not have status=1.
INFORCRM-10383	(ICBOE) When an Outbound txn for a noun has actioncode= Add and status=1 a warning log should be logged to indicate the process will attempt to resend.

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

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



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

Defect	Description
INFORCRM-6223	Creating an ad hoc group with more than 10000 records does not include all selected records.
INFORCRM-6344	A duplicated translation in a resource file may cause an error in the Web Client.
INFORCRM-6754	The ID string in AddEditDialog.js is incorrectly exposed for translation.
INFORCRM-6907	Contact data is sometimes overwritten when navigating between records on the Contact detail view.
INFORCRM-8045	When completing an activity any people added to the Availability tab (including leader) are not added to HistoryAttendee table so they do not show on All Participants tab of History record.
INFORCRM-8172	After adding a contact to the details in the Infor CRM Activity task pane in Microsoft Outlook, the IsAttendee column is null in the Infor CRM activity record.
INFORCRM-8397	In a German environment, in the Infor CRM Web Client Query Builder, on the Assign Condition view the Cancel (Abbrechen) button is truncated on the screen.
INFORCRM-8404	The internal processing of the 5 main build phases should run in parallel.
INFORCRM-8429	In the Dashboard, the Number of Records value does not function in a group list chart.
INFORCRM-8640	In Application Architect, there needs to be a way to set the Manage Schema property for entities.

Defect	Description
INFORCRM-8824	In an Oracle environment, filtered lookup results fail when results contain special characters.
INFORCRM-8837	Group column properties have different formats in the Web and Windows clients.
INFORCRM-8839	In the Web Client Ticket detail view, the Reset button clears two fields in the Details tab view when using an Internet Explorer browser.
INFORCRM-8847	Duplicated joins appear when a user creates a new entity related to existing entity.
INFORCRM-8869	In an Oracle 11g environment, the Return Distinct Row Only option causes an HTTP:500 error when selecting filters in the task pane.
INFORCRM-8871	When accessing an offline Web Client with Turkish regional settings, an error occurs.
INFORCRM-8875	Administrator does not show users that are logged into the Web client when using Windows Authentication.
INFORCRM-8879	User Security does not always update properly when changing Department or Team Membership from the Web Client.
INFORCRM-8880	When using the German-Switzerland (de-ch) cultural code, currency controls do not accept decimal values correctly.
INFORCRM-8883	Members added to the Availability tab when completing a meeting do not create records in the HistoryAttendee table.
INFORCRM-8884	In the Web client, the group conditions "starts with" and "contains" are not handled correctly.
INFORCRM-8894	In the Application Architect, if a legacy grid datasource references an entity with name beginning with 'I', the "I" is dropped which creates an invalid datasource.
INFORCRM-8918	Adding new tab on the EditQuoteItem quick form throws an exception error.
INFORCRM-8919	In the Application Architect, on the EditQuoteItem form adding a new page to the multi-tab causes an error.
INFORCRM-8956	DateTimePickerAdvancedPropertyEditor.json and FormBasicPropertyEditor.json contain Incorrect strings.
INFORCRM-8963	When you complete an unscheduled activity, changing the opportunity or ticket should not change the existing contact or account.
INFORCRM-9002	(ICBOE) The Promote link is not available to standard users on the Contact, Bill To and Pay From views.
INFORCRM-9020	(ICBOE) An error occurs when synchronizing an A+ BOD and the Code value is empty.
INFORCRM-9026	(ICBOE) When you add a new account in ICBOE you cannot select a Carrier because the pick list is empty. This should either be a read only field or the pick list should have values.
INFORCRM-9032	(ICBOE) The Quote Expiration date field should be required.
INFORCRM-9038	(ICBOE) When carriers are automatically created they do not have a LogicalID.
INFORCRM-9041	(ICBOE) Sales orders deleted in Infor CRM have a status of open in the process BOD.
INFORCRM-9042	(ICBOE) Location is not mandatory for a new sales order or quote, but the promotion process is asking for Location.
INFORCRM-9084	(ICBOE) Add mandatory fields ERP Document Date, ERP Status, ERP Start Date, ERP End Date to the Sales Order and Quote insert and detail views.
INFORCRM-9365	In an Oracle environment, a custom Application Architect bundle to localize database items fails.

Defect	Description
INFORCRM-9386	Replace the XmlDiff component with a method of checking if two model items are different.
INFORCRM-9412	(ICBOE) Converting a quote to a sales order should publish an updated ProcessQuote BOD.
INFORCRM-9416	(ICBOE) Pricing and Availability real-time service client needs performance improvement.
INFORCRM-9439	(ICBOE) Quote and sales order product prices are not updated, when a warehouse is assigned to an unassigned warehouse product.
INFORCRM-9441	(ICBOE) Sales order and Quote records, returns error "No default Sales Office is found in sales user profile or at customer".
INFORCRM-9471	In an environment with the de-ch culture code currency fields do not accept decimal values.
INFORCRM-9486	The Web Client Mail Merge Contact Lookup does not return any results.
INFORCRM-9488	The Mail Merge Opportunity Contact Lookup does not return any results.
INFORCRM-9496	There are cross scripting vulnerabilities in multiple lines of code.
INFORCRM-9497	There are cross scripting reflected vulnerabilities in a couple lines of code.
INFORCRM-9498	Multiple lines of code have a Validation.Required.URL vulnerability.
INFORCRM-9543	(ICBOE) When attempting to delete a converted Sales Order record, a Saleslogix error message displays.
INFORCRM-9585	The Sales Order and Quote snapshots Sub Total and Grand Total fields are not calculated correctly.
INFORCRM-9586	The secured action for Convert Quote to Order is not included in any of the out-of-the-box roles.
INFORCRM-9634	Address SQL injection vulnerabilities.
INFORCRM-9681	(ICBOE) Unable to add a new BOD Mapping to be referenced in the BOD template.
INFORCRM-9692	(ICBOE) The Unit of Measure lookup does not filter based on selected product.
INFORCRM-9697	(ICBOE) The Back Office detail view Price List tab should be removed.
INFORCRM-9741	Implement HTML encoding for vulnerabilities.
INFORCRM-9748	(ICBOE) The ERPEXTID BOD field mapping is skipped when processing inbound BOD's.
INFORCRM-9777	Several security items can be fixed by adding second and third parameter "StreamWriter(fs, Encoding.UTF8, 512):"
INFORCRM-9782	In the Infor CRM Xbar activity pane in Outlook, after completing a recurrence of a recurring activity, no changes occur and the Completed Activity view does not display.
INFORCRM-9802	Add encoding to address security vulnerabilities.
INFORCRM-9855	(ICBOE) When changing the account on a quote the related addresses for bill to and ship to are not updated.
INFORCRM-9889	(ICBOE) Change the Available Warehouses dialog box title to "Available to Promise".

File information

This update may include .pdb files which are not listed in the following table. These files are included to provide additional logging information for troubleshooting purposes.

File Name	File Contents	File Version
Infor_CRM_v830_Web_Core_Update_04.zip	Infor_CRM_v830_Web_Core_Update_04.exe	
	ICRM v8.3 Core 04 VFS Actions.zip	
	ICRM v8.3.0 VFS Web Core Update 02.zip	
Infor_CRM_v830_Web_Core_Update_04.exe	ApplicationArchitect.exe	8.3.0.2066
	Bundler.exe	8.3.0.1270
	ConversionUtility.exe	8.3.0.2371
	GroupTranslator.dll	8.3.0.2052
	Sage.Platform.AdminModule.dll	8.3.0.1270
	Sage.Platform.Application.dll	8.3.0.2229
	Sage.Platform.Application.UI.WinForms.dll	8.3.0.2066
	Sage.Platform.BundleModel.dll	8.3.0.2229
	Sage.Platform.Deployment.AdminModule.dll	8.3.0.2229
	Sage.Platform.Deployment.dll	8.3.0.1270
	Sage.Platform.dll	8.3.0.2371
	Sage.Platform.FileSystem.dll	8.3.0.2371
	Sage.Platform.IDEModule.dll	8.3.0.2066
	Sage.Platform.Mashups.dll	8.3.0.2229
	Sage.Platform.Orm.CodeGen.dll	8.3.0.1270
	Sage.Platform.Projects.dll	8.3.0.2066
	Sage.Platform.QuickForms.Designer.dll	8.3.0.1270
	Sage.Platform.QuickForms.dll	8.3.0.1270
	Sage.Platform.QuickForms.QFControls.dll	8.3.0.1270
	Sage.Platform.QuickForms.WebFormGen.dll	8.3.0.1270
	Sage.Platform.Upgrade.AdminModule.dll	8.3.0.1270
	Sage.Platform.VirtualFileSystem.dll	8.3.0.1270
	Sage.Platform.WebPortal.Design.AdminModule.dll	8.3.0.2066
	Sage.Platform.WebPortal.Design.dll	8.3.0.1270
	Sage.Platform.WebPortal.dll	8.3.0.2371
	Sage.Saleslogix.Activity.dll	8.3.0.2371
	Sage.Saleslogix.BundleModel.BundleActions.dll	8.3.0.2229
	Sage.Saleslogix.BusinessRules.dll	8.3.0.2371
	Sage.Saleslogix.Client.Reports.dll	8.3.0.2229
	Sage.Saleslogix.dll	8.3.0.1270

File Name	File Contents	File Version
	Sage.Saleslogix.PickLists.dll	8.3.0.2371
	Sage.Saleslogix.Plugins.dll	8.3.0.2066
	Sage.Saleslogix.QuickForms.QFControls.Design.dll	8.3.0.1270
	Sage.Saleslogix.QuickForms.QFControls.dll	8.3.0.2371
	Sage.Saleslogix.SchemaSupport.dll	8.3.0.2066
	Sage.Saleslogix.Security.dll	8.3.0.2066
	Sage.Saleslogix.Upgrade.AdminModule.dll	8.3.0.1270
	Sage.Saleslogix.Web.Controls.dll	8.3.0.2371
	Sage.Saleslogix.Web.dll	8.3.0.2229
	Sage.Scheduling.dll	8.3.0.2066
	Saleslogix.Integration.BOE.Common.dll	8.3.0.2371
	SLXJobServer.exe	8.3.0.2371
	WebProvision.exe	8.3.0.2229
ICRM v8.3.0 VFS Web Core Update 04.zip	_CountryAliasConversionDialogBase.js	
	Activity.js	
	Activity_ar.js	
	Activity_ca.js	
	Activity_cs.js	
	Activity_da.js	
	Activity_de.js	
	Activity_de-ch.js	
	Activity_el.js	
	Activity_en.js	
	Activity_en-gb.js	
	Activity_en-us.js	
	Activity_es.js	
	Activity_es-es.js	
	Activity_es-mx.js	
	Activity_fi-fi.js	
	Activity_fr.js	
	Activity_fr-fr.js	
	Activity_he-il.js	
	Activity_hu.js	
	Activity_it.js	
	Activity_it-it.js	
	Activity_ja-jp.js	
	Activity_ko-kr.js	
	Activity_nb.js	

File Name	File Contents	File Version
	Activity_nl-nl.js	
	Activity_pl.js	
	Activity_pt.js	
	Activity_pt-br.js	
	Activity_pt-pt.js	
	Activity_ROOT.js	
	Activity_ru.js	
	Activity_sk.js	
	Activity_sl.js	
	Activity_sv.js	
	Activity_th.js	
	Activity_tr.js	
	Activity_zh-cn.js	
	Activity_zh-tw.js	
	ActivityCalendar.js	
	Activity-Combined.js	
	ActivityEditor.js	
	ActivityGroupContextService.js	
	ActivityList.js	
	ActivityScheduler.js	
	ActivityService.js	
	addCalcField.ascx.resx	
	addCalcField.js	
	AddEditDialog.js	
	AddEditEntity.js	
	AddEditFiltersDialog.js	
	AddEditPropertiesDialog.js	
	Address.js	
	Admin.js	
	Admin_ar.js	
	Admin_ca.js	
	Admin_cs.js	
	Admin_da.js	
	Admin_de.js	
	Admin_de-ch.js	
	Admin_el.js	
	Admin_en.js	
	Admin_en-gb.js	

File Name	File Contents	File Version
	Admin_en-us.js	
	Admin_es.js	
	Admin_es-es.js	
	Admin_es-mx	
	Admin_fi-fi.js	
	Admin_fr.js	
	Admin_fr-fr.js	
	Admin_he-il.js	
	Admin_hu.js	
	Admin_it.js	
	Admin_it-it.js	
	Admin_ja-jp.js	
	Admin_ko-kr.js	
	Admin_nb.js	
	Admin_nl-nl.js	
	Admin_pl.js	
	Admin_pt.js	
	Admin_pt-br.js	
	Admin_pt-pt.js	
	Admin_ROOT.js	
	Admin_ru.js	
	Admin_sk.js	
	Admin_sl.js	
	Admin_sv.js	
	Admin_th.js	
	Admin_tr.js	
	Admin_zh-cn.js	
	Admin_zh_tw.js	
	Admin-Combined.js	
	ajaxloading.gif	
	ApplicationStateService.js	
	Attachments.js	
	AttachmentList.js	
	BackOfficeAcctEntity.BACKOFFICEACCTENTITY.entity.xml	
	Base.js	
	Base_ar.js	
	Base_ca.js	
	Base_cs.js	
	Base_da.js	

File Name	File Contents	File Version
	Base_de.js	
	Base_de-ch.js	
	Base_el.js	
	Base_en.js	
	Base_en-gb.js	
	Base_en-us.js	
	Base_es.js	
	Base_es-es.js	
	Base_es-mx.js	
	Base_fi-fi.js	
	Base_fr.js	
	Base_fr-fr.js	
	Base_he-il.js	
	Base_hu.js	
	Base_it.js	
	Base_it-it.js	
	Base_ja-jp.js	
	Base_ko-kr.js	
	Base_nb.js	
	Base_nl-nl.js	
	Base_pl.js	
	Base_pt.js	
	Base_pt-br.js	
	Base_pt-pt.js	
	Base_ROOT.js	
	Base_ru.js	
	Base_sk.js	
	Base_sl.js	
	Base_sv.js	
	Base_th.js	
	Base_tr.js	
	Base_zh-cn.js	
	Base_zh-tw.js	
	Base-Combined.js	
	blackpin.png	
	bluepin.png	
	bluestar.png	
	BOEPAService.BOEPAERVICE.entity.xml	

File Name	File Contents	File Version
	browseField.ascx	
	BulkUpdateWidget.js	
	bundleData.xml	
	calcFields.js	
	CalendarUsersListPane.js	
	CanPromoteOpportunity.method.xml	
	chartwidget.js	
	CheckEdit.method.xml	
	City.filter.xml	
	CommonTasksTasklet.js	
	ConditionManager.js	
	Contact.filter.xml	
	ContactUserAssociationEditor.js	
	CountryAliasConversion.js	
	Country.filter.xml	
	CountryTasksTasklet.js	
	currency.js	
	Dashboard.js	
	Dashboard_ar.js	
	Dashboard_ca.js	
	Dashboard_cs.js	
	Dashboard_da.js	
	Dashboard_de.js	
	Dashboard_de-ch.js	
	Dashboard_el.js	
	Dashboard_en.js	
	Dashboard_en-gb.js	
	Dashboard_en-us.js	
	Dashboard_es.js	
	Dashboard_es-es.js	
	Dashboard_es-mx.js	
	Dashboard_fi-fi.js	
	Dashboard_fr.js	
	Dashboard_fr-fr.js	
	Dashboard_he-il.js	
	Dashboard_hu.js	
	Dashboard_it.js	
	Dashboard_it-it.js	
	Dashboard_ja-jp.js	

File Name	File Contents	File Version
	Dashboard_ko-kr.js	
	Dashboard_nb.js	
	Dashboard_nl-nl.js	
	Dashboard_pl.js	
	Dashboard_pt.js	
	Dashboard_pt-br.js	
	Dashboard_pt-pt.js	
	Dashboard_ROOT.js	
	Dashboard_ru.js	
	Dashboard_sk.js	
	Dashboard_sl.js	
	Dashboard_sv.js	
	Dashboard_th.js	
	Dashboard_tr.js	
	Dashboard_zh-ch.js	
	Dashboard_zh-tw.js	
	Dashboard-Combined.js	
	DateTimePicker.js	
	DateTimePickerAdvancedPropertyEditor.js	
	DefaultDropHandler.js	
	Dialog.js	
	Dialog_ar.js	
	Dialog_ca.js	
	Dialog_cs.js	
	Dialog_da.js	
	Dialog_de.js	
	Dialog_de-ch.js	
	Dialog_el.js	
	Dialog_en.js	
	Dialog_en-gb.js	
	Dialog_en-us.js	
	Dialog_es.js	
	Dialog_es-es.js	
	Dialog_es-mx.js	
	Dialog_fi-fi.js	
	Dialog_fr.js	
	Dialog_fr-fr.js	
	Dialog_he-il.js	

File Name	File Contents	File Version
	Dialog_hu.js	
	Dialog_it.js	
	Dialog_it-it.js	
	Dialog_ja-jp.js	
	Dialog_ko-kr.js	
	Dialog_nb.js	
	Dialog_nl-nl.js	
	Dialog_pl.js	
	Dialog_pt.js	
	Dialog_pt-br.js	
	Dialog_pt-pt.js	
	Dialog_ROOT.js	
	Dialog_ru.js	
	Dialog_sk.js	
	Dialog_sl.js	
	Dialog_sv.js	
	Dialog_th.js	
	Dialog_tr.js	
	Dialog_zh-cn.js	
	Dialog_zh-tw.js	
	Dialog-Combined.js	
	DocCalculateCalcPrice.method.xml	
	DocCalculateSalesPotential.method.xml	
	DropDownSelectUser.js	
	Email.js	
	EntityDetailFilterGrid.js	
	EntityDetailPropertyGrid.js	
	EntityDetails.js	
	EntityDetailUtility.js	
	EntityManagerGroupContextService.js	
	EntityProperties.js	
	ERPInvoice.ERPINVOICE.entity.xml	
	ERPShipment.ERPSHIPMENT.entity.xml	
	Feeds.js	
	File.js	
	FilterManager.js	
	FolderHandler.js	
	FormBasicPropertyEditor.js	
	FSCOPY_Mingle_Backup.xml	

File Name	File Contents	File Version
	GeneralSchemaReader.js	
	GeocodeEveryFifteenMinutesIndefinitely.trigger.xml	
	GeoCodeProviderConfiguration. GEOCODEPROVIDERCONFIGURATION.entity.xml	
	greenpin.png	
	Grid.js	
	GridView.js	
	GroupListTasklet.js	
	GroupManager.js	
	GroupManagerGroupContextService.js	
	GroupNavigator.js	
	Groups.js	
	HistoryEditor.js	
	ImportHistory.IMPORTHISTORY.entity.xml	
	ImportLeadsWizard.js	
	infor-companyon-client.js	
	Integration.GeoCodeProviderConfiguration. 8e9bb7a9ee4c41199bc90fe7ae4819c8.relationship.xml	
	JobManagerGroupContextService.js	
	JobSchedulingWidget.js	
	jquery-2.2.3.min.js	
	layout.css	
	ListPanel.js	
	LiteratureManagementTasks.js	
	Lookup.js	
	MailMergeService.js	
	MailMergeService_ar.js	
	MailMergeService_ca.js	
	MailMergeService_cs.js	
	MailMergeService_da.js	
	MailMergeService_de.js	
	MailMergeService_de-ch.js	
	MailMergeService_el.js	
	MailMergeService_en.js	
	MailMergeService_en-gb.js	
	MailMergeService_en-us.js	
	MailMergeService_es.js	

File Name	File Contents	File Version
	MailMergeService_es-es.js	
	MailMergeService_es-mx.js	
	MailMergeService_fi-fi.js	
	MailMergeService_fr.js	
	MailMergeService_fr-fr.js	
	MailMergeService_he-il.js	
	MailMergeService_hu.js	
	MailMergeService_it.js	
	MailMergeService_it-it.js	
	MailMergeService_ja-jp.js	
	MailMergeService_ko-kr.js	
	MailMergeService_nb.js	
	MailMergeService_nl-nl.js	
	MailMergeService_pl.js	
	MailMergeService_pt.js	
	MailMergeService_pt-br.js	
	MailMergeService_pt-pt.js	
	MailMergeService_ROOT.js	
	MailMergeService_ru.js	
	MailMergeService_sk.js	
	MailMergeService_sl.js	
	MailMergeService_sv.js	
	MailMergeService_th.js	
	MailMergeService_tr.js	
	MailMergeService_zh-cn.js	
	MailMergeService_sh-tw.js	
	main.js	
	Manager.js	
	manifest.xml	
	MingleSupport.js	
	MultiSelectPickList.js	
	Name.filter.xml	
	Name.js	
	NotesHistoryList.js	
	Numeric.js	
	OnBeforeDelete.method.xml	
	OnBeforeInsert.method.xml	
	OnBeforeUpdate.method.xml	
	OnCreate.method.xml	

File Name	File Contents	File Version
	OpportunityProduct.OPPORTUNITY_PRODUCT.entity.xml	
	OpportunityStatistics.js	
	orangepin.png	
	OwnerAssign.js	
	Phone.js	
	PickListName.filter.xml	
	pinkpin.png	
	Place.Address. 31d7c82c36e549babbb4d53fdd42264f. relationship.xml	
	Place.PLACE.entity.xml	
	Place.User. ebed89d240b94a77986fd132894d49cf. relationship.xml	
	PriceOrderHeader.method.xml	
	PriceQuoteHeader.method.xml	
	PricingAndAvailability.js	
	PricingAvailabilityWidget.html	
	PricingAvailabilityWidget.js	
	purplepin.png	
	QBTreeStoreModel.js	
	QueryBuilderMain.js	
	QuoteTasksTasklet.js	
	redpin.png	
	Relationship.js	
	Report.js	
	Report_ar.js	
	Report_ca.js	
	Report_cs.js	
	Report_da.js	
	Report_de.js	
	Report_de-ch.js	
	Report_el.js	
	Report_en.js	
	Report_en-gb.js	
	Report_en-us.js	
	Report_es.js	

File Name	File Contents	File Version
	Report_es-es.js	
	Report_es-mx.js	
	Report_fi-fi.js	
	Report_fr.js	
	Report_fr-fr.js	
	Report_he-il.js	
	Report_hu.js	
	Report_it.js	
	Report_it-it.js	
	Report_ja-jp.js	
	Report_ko-kr.js	
	Report_nb.js	
	Report_nl-nl.js	
	Report_pl.js	
	Report_pt.js	
	Report_pt-br.js	
	Report_pt-pt.js	
	Report_ROOT.js	
	Report_ru.js	
	Report_sk.js	
	Report_sl.js	
	Report_sv.js	
	Report_th.js	
	Report_tr.js	
	Report_zh-cn.js	
	Report_zh-tw.js	
	Report-Combined.js	
	RePriceOrder.method.xml	
	RePriceQuote.method.xml	
	Request.js	
	RoleSecurityService.js	
	Sage.js	
	Sage.Platform.Application.dll	8.3.0.2229
	Sage.Platform.BundleModel.dll	8.3.0.2229
	Sage.Platform.dll	8.3.0.2371
	Sage.Platform.FileSystem.dll	8.3.0.2229
	Sage.Platform.Mashups.dll	8.3.0.2229
	Sage.Platform.Projects.dll	8.3.0.2066
	Sage.Platform.WebPortal.dll	8.3.0.2371

File Name	File Contents	File Version
	Sage.Platform.WebPortal.resources.dll	8.3.0.1270
	Sage.SalesLogix.Activity.dll	8.3.0.2371
	Sage.SalesLogix.BusinessRules.dll	8.3.0.2371
	Sage.SalesLogix.BusinessRules.Jobs. CreateAdHocGroupJob.job.xml	
	Sage.SalesLogix.BusinessRules.Jobs. GeocodeJob.job.xml	
	Sage.SalesLogix.Client.GroupBuilder.dll	8.3.0.2371
	Sage.SalesLogix.Client. IntegrationContract.Modules.dll	8.3.0.2371
	Sage.SalesLogix.Client.MailMerge.dll	8.3.0.2066
	Sage.SalesLogix.Client.Reports.dll	8.3.0.2229
	Sage.SalesLogix.dll	8.3.0.1270
	Sage.SalesLogix.GlobalCrmContractAdapter.dll	8.3.0.2371
	Sage.SalesLogix.IntegrationContract.dll	8.3.0.2371
	Sage.SalesLogix. IntegrationContract.SyncEngine.dll	8.3.0.2371
	Sage.SalesLogix.PickLists.dll	8.3.0.2371
	Sage.SalesLogix.Plugins.dll	8.3.0.2066
	Sage.SalesLogix.QuickForms. QFControls.dll	8.3.0.2371
	Sage.SalesLogix.Security.dll	8.3.0.2066
	Sage.SalesLogix.Services.Import.dll	8.3.0.2371
	Sage.SalesLogix.Services.Integration.dll	8.3.0.2229
	Sage.SalesLogix.Services.PotentialMatch.dll	8.3.0.2066
	Sage.SalesLogix.SystemAdapter.dll	8.3.0.2371
	Sage.SalesLogix.Web.Controls.dll	8.3.0.2371
	Sage.SalesLogix.Web.dll	8.3.0.2229
	Sage.SalesLogix.Web.Modules.dll	8.3.0.2229
	Sage.SalesLogix.WebUserOptions.dll	8.3.0.1270
	Sage.Scheduling.dll	8.3.0.2066
	Sage_ar.js	
	Sage_ca.js	
	Sage_cs.js	
	Sage_da.js	
	Sage_de.js	
	Sage_de-ch.js	

File Name	File Contents	File Version
	Sage_el.js	
	Sage_en.js	
	Sage_en-gb.js	
	Sage_en-us.js	
	Sage_es.js	
	Sage_es-es.js	
	Sage_es-mx.	
	Sage_fi-fi.js	
	Sage_fr.js	
	Sage_fr-fr.js	
	Sage_he-il.js	
	Sage_hu.js	
	Sage_it.js	
	Sage_it-it.js	
	Sage_ja-jp.js	
	Sage_ko-kr.js	
	Sage_nb.js	
	Sage_nl-nl.js	
	Sage_pl.js	
	Sage_pt.js	
	Sage_pt-br.js	
	Sage_pt-pt.js	
	Sage_ROOT.js	
	Sage_ru.js	
	Sage_sk.js	
	Sage_sl.js	
	Sage_sv.js	
	Sage_th.js	
	Sage_tr.js	
	Sage_zh-cn.js	
	Sage_zh-tw.js	
	Sage-Combined.js	
	sage.platform.css	
	sage-platform-tabworkspace.js	
	sage-styles.css	
	Saleslogix.Geocode.dll	8.3.0.2371
	Saleslogix.Integration.BOE.Common.dll	8.3.0.2371
	Saleslogix.Integration.BOE.Jobs.dll	8.3.0.2371

File Name	File Contents	File Version
	Saleslogix.Integration.BOE. PriceAndAvailability.dll	8.3.0.2371
	Saleslogix.Reporting.Jobs.dll	8.3.0.1270
	Saleslogix.SData.Client.dll	2.0.1.1559
	Saleslogix.SDataSyncJob.dll	8.3.0.2371
	SalesOrderTasksTasklet.js	
	SData.js	
	sdata-client.js	
	sdata-client-debug.js	
	SearchConditionWidget.js	
	SecurityManager.js	
	Service.js	
	Share_16x16.png	
	SimpleTextarea.js	
	SingleSelectPickList.js	
	SORPromote.method.xml	
	star.png	
	State.filter.xml	
	SummaryContainer.js	
	SyncHistoryTasksTasklet.js	
	TabController.js	
	tealpin.png	
	URL.js	
	UserService.js	
	Utility.js	
	ValidateGeocodeProvider Configuration.method.xml	
	WidgetEditor.js	
	yellowpin.png	
	yellowstar.png	
The following new schema was added or modified to accommodate the System of Record feature		

File Name	File Contents	File Version
	Opportunity <ul style="list-style-type: none">■ AlternateKeyPrefix■ AlternateKeySuffix■ ErpExtId■ ErpVariationId■ SyncStatus■ ErpLocation■ DocActualAmount - Decimal■ DocSalesPotential - Double	
	DiscountChargeItem <ul style="list-style-type: none">■ UnitAdjustmentAmount - Double■ DocUnitAdjustmentAmount – Double	
	PackageKitChildView (modified) <ul style="list-style-type: none">■ Product.ErpStatus property	

File Name	File Contents	File Version
ICRM v8.3 Core 04 VFS Actions.zip	<p>Create Database Object Definition</p> <ul style="list-style-type: none"> ■ AttendeeRemoteSync(All) ■ DeleteObsoleteSmartParts ■ FixAttendeeRolePicklist (Oracle) ■ PackageKitChildView <ul style="list-style-type: none"> ■ Add ErpStatus Column (MSSQL) ■ Add ErpStatus Column (Oracle) ■ PickListItemView(MSSQL) ■ PlaceRemoteSync ■ ProdPackageKitView <ul style="list-style-type: none"> ■ Add ErpStatus Column (MSSQL) ■ Add ErpStatus Column (Oracle) ■ Remove duplicate CustomSetting records ■ Remove Invalid ObjectNames (MSSQL) ■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_A (MSSQL) ■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_U (MSSQL) ■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_A (Oracle) ■ USERSECURITY_FEDERATEDIDENTITY_LENGTH_U (Oracle Unicode) ■ USERSECURITY_USERNAME_LENGTH_A (Oracle) ■ USERSECURITY_USERNAME_LENGTH_U (Oracle Unicode) ■ USERSECURITY_USERNAME_LENGTH_U(MSSQL) ■ USERSECURITY_USERNAME_LENGTH_A(MSSQL) 	

File Name	File Contents	File Version
	Insert Record(s) <ul style="list-style-type: none"> ■ APPIDMAPPING ■ BACKOFFICE ■ BACKOFFICEACCTENTITY ■ BODFIELDMAPPING ■ BODMAPPING ■ CUSTOMSETTINGS ■ INDEXDEFINITION ■ INTEGRATION ■ JOINDATA ■ USEROPTIONDEF 	
	Insert Picklist <ul style="list-style-type: none"> ■ Calculation Methods ■ QuoteStatus ■ ErpAccountStatus ■ ErpQuoteStatus ■ SearchClause ■ SyncStatus ■ SystemOfRecord 	
	Install Plugin <ul style="list-style-type: none"> ■ CrystalReport: Opportunity: Opportunity Detail ■ DashboardWidget System: Group List ■ DashboardWidget System: SData Feed ■ Group BODMAPPING:CustomBODMappings ■ Group BODMAPPING:StandardBODMappings ■ Group BODMAPPING:InactiveBODMappings ■ Group BODMAPPING:AllBODMapping ■ Group BODMAPPING:Active BOD Mappings ■ Group PLACE:AllPlaces ■ Group PLACE:MyPlaces ■ Group PLACE:SharedPlaces 	

File Name	File Contents	File Version
	<p>Add Secured Action(s)</p> <ul style="list-style-type: none">■ Contour/Map/Account■ Contour/Map/Contact■ Contour/Map/Group■ Contour/map/Menu■ Entities/Opportunity/Promote■ Entities/Place/Add■ Entities/Place/Delete■ Entities/Place/Edit■ Entities/Place/Share■ Entities/Place/ShareDelete■ Entities/Place/ShareEdit■ Entities/Place/View■ Entities/Quote/GetOrderTotal■ Entities/Quote/RePriceQuote■ Entities/SalesOrder/GetOrderTotal■ Entities/SalesOrder/RePriceOrder	
	<p>Add Role(s)</p> <ul style="list-style-type: none">■ Standard User■ Contour	

Chapter 2

Applying the Update

2

This Web Core Update affects the following portals:

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

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

- Administrative Tools and Servers
- Application Architect
- Offline Web Client
- Web Host




Install the VFS bundles using the Application Architect, and then build and deploy your Web site(s).

Installing the update

To begin the install

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

3. Extract the contents of the **Infor_CRM_v830_Web_Core_Update_04.zip** file to a temporary folder.
4. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v830_Web_Core_Update_04.exe**.
5. On the **Infor CRM v8.3.0 Web Core Update 04** screen do the following:
 - a. Select the **Extract and Install the Infor CRM Update** option. The Update files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete. Selecting the other option prevents the VFS bundle from being available after the patch is installed, because the files are then deleted.
 - b. Click **Change** to select the location where you want to store the update files.
 There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).
6. Click **Next**.
7. On the **Welcome** screen, click **Install** to install the patch.
8. If prompted to reboot, click **OK** to allow the reboot.
9. On the **Completed** screen, click **Finished**.

Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

To install the bundle

1. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
2. Open the **Application Architect**.
3. On the **View** menu, click **Bundle Manager**.
4. Click **Install**.
5. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.3.0 VFS Web Core Update 04.zip**, and then click **Open**.
6. On the **Select Bundle** screen, click **Next**.
7. On the **Select Items** screen, ensure the **Portals** option is selected.
8. Click **Next**, and then click **Finish**.
9. Rebuild the database schema.
 - On the **Tools** menu, click **Rebuild Database Schema**.
10. Repeat steps 3-8 to apply the **ICRM v8.3 Core 04 VFS Actions.zip** bundle.

Running the Conversion Utility



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

The Conversion Utility contains two new options:

- **Create account and contact pretty key**

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

- **Convert Proximity Search to Contour**

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



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

The Conversion Utility also contains these options:

- **Create opportunity pretty key**

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

- **Convert opportunity document pricing properties**

This will assign the new document pricing properties as follows:

- $\text{Opportunity.DocSalesPotential} = \text{SalesPotential} * \text{ExchangeRate}$
- $\text{Opportunity.DocActualAmount} = \text{ActualAmount} * \text{ExchangeRate}$
- $\text{Opportunity_Product.DocCalculatedPrice} = \text{CalcPrice} * \text{ExchangeRate}$
- $\text{Opportunity_Product.DocExtendedPrice} = \text{ExtendedPrice} * \text{ExchangeRate}$



This version of the Conversion Utility overwrites the version delivered in Infor CRM v8.3. This version only includes the updates delivered in 8.3.0.01 through 8.3.0.04. If you have not already run the 8.3 Conversion Utility you must first run the 8.3 version of the Conversion Utility before you may upgrade to 8.3.0.04.

To run

1. On the Administrative Workstation, browse to the ConversionUtility.config file. By default, this is in \Program Files (x86)\Saleslogix.
2. Open **ConversionUtility.config** with the text editor of your choice.
3. Scroll to the <connectionStrings> section and change the **Initial Catalog** value to your Connection Manager name.
For example:
Change the value from: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;**Initial Catalog=SALESLOGIX**;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE"" />

Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;**Initial Catalog=MyDatabase**;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE"" />
4. Double click the **ConversionUtility** application.
5. In the Conversion Utility interface, clear any actions you do not want to run and click **Update**.

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

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



These steps are only required for implementations using Sync for Exchange or Sync for Gmail. If you do not use either integration, then you may continue to ["Building and deploying the Web changes" on page 35](#).

To update the tenant.config

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

```
<dependentAssembly>
  <assemblyIdentity name="Saleslogix.SData.Client" publicKeyToken="ca62383dd1d25f65" />
  <bindingRedirect oldVersion="2.0.0.0-2.0.1.1554" newVersion="2.0.0.0" />
</dependentAssembly>
```
8. Save your changes.

Building and deploying the Web changes

To make your changes available, you must build and deploy the Web portal(s).

To build and deploy

1. In the **Project Explorer**, click the project.
2. Press and hold the **CTRL** key, and then on the **Build** menu, click **Build Web Platform**. All the files in the entire assembly for the current project are compiled. Status for the build is displayed in the Output Window at the bottom of the screen.
3. When the build is complete, on the **View** menu, click **Deployment Explorer**.
4. Expand **Deployments**.
5. Double-click the portal to deploy.
6. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.



- By default, the Infor CRM Web Client portal is set to deploy to the localhost, but you can change these settings to fit your environment.
- Changes will not be visible to the Web Client and/or Web remote Office until after the next Sync cycle.

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

Enabling Permissions for Refresh Pricing

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



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

To assign Refresh Pricing permissions

1. Sign into the **Infor CRM Web Client** as the **Administrative user**.
2. In the **Navigation** bar, expand **ADMINISTRATION**, expand **Roles**, and select the role assigned to users who are to be given permissions to Promote.
You may choose to create a new role or assign these permissions to an existing role, such as the Standard User role.
3. Click the **Actions** tab.
4. Click the Add (plus) button.
5. In the **Lookup**, locate the secured action you want to assign
 - For permissions to refresh pricing on **Quotes**, select **Entities/RePriceQuote**.
 - For permissions to refresh pricing on **Sales Orders**, select Double-click and then click **Close**.
6. Double-click and then click **Close**.

