



Applying SNC Update 02 for Version 8.4

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Publication Information

Release: 8.4.0.02

Publication date: 9/5/2019

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Introduction



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

About this guide

This document describes SNC Update 02 for Infor CRM version 8.4. SNC Updates provide modifications to pieces such as the Provider, SLX Server, Admin, Architect, Windows Client, SpeedSearch, Sync Server, Sync Client, and so forth. Applying these updates may also be required for Web environments when the fix is for the Provider, Server, or SpeedSearch.

Prerequisites

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

- Infor CRM version 8.4



Do not install SNC Update 02 for Infor CRM 8.4 on any other Infor CRM version.



SNC Updates are cumulative. You do not need to install earlier SNC updates before installing SNC Update 02.

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

Changes in this Update

1

This chapter lists all of the changes to Infor CRM since version 8.4.

Breaking Changes

This release contains breaking changes introduced in Web Core Update 01 for Infor CRM version 8.4. Please see the *Applying Web Core Update 02 for Version 8.4* document for details.

Features added in this update

SNC Update 02 for Infor CRM 8.4 contains features released in previous updates.

This section lists the features available in each update and indicates the type of update (SNC, Core, or Model) required, as well as any additional pieces required to fully install the feature.

| Application | Feature | Requires | | | | |
|-------------|---|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| 8.4.0.02 | | | | | | |
| Web Client | | | | | | |
| | Marketo Partitioning 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. | x | x | x | | |
| | For more information, please refer to the <i>Configuring Marketo Integration for the Infor CRM WebClient.pdf</i> document. | | | | | |
| | | | | | | |
| | For Back Office implementations: | | | | | |

| Application | Feature | Requires | | | | |
|-------------|--|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| | <p>New Custom Setting for "Contact Account Management Enabled".</p> <p>When enabled, this custom setting instructs the inbound processor to cascade changes to the account's account manager to the account's related contacts.</p> | x | x | | | |
| | <p>New Custom Setting for "Publish All Addresses".</p> <p>When enabled, this custom setting allows the outbound processor to publish multiple addresses. To publish only the primary address this custom setting must be cleared.</p> | x | x | x | x | |
| | <p>New Custom Setting for "Integrated Primary Contact indicator".</p> <p>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.</p> | x | x | x | x | |
| | For Sync for Exchange implementations: | | | | | |
| | <p>(Sync for Exchange only) New Sync for Exchange integration custom setting</p> <p>"Complete Exchange Appointments", is disabled by default, but when enabled synchronizes all completed appointment between Infor CRM and Exchange.</p> | x | x | | | |

| Application | Feature | Requires | | | | |
|-----------------------|--|-----------------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| | (Sync for Exchange only) Updated the Sync for Exchange integration custom setting "Notify Members of Completion" to be disabled by default. When enabled, activity members are notified when an activity is completed, | x | x | | | |
| Application Architect | | No new features | | | | |
| Windows Client | | No new features | | | | |
| 8.4.0.01 | | | | | | |
| Web Client | New Help About box: <ul style="list-style-type: none"> In 8.4 and earlier, the Help>About 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 Help>About box to ensure the accurate version number is available. | x | x | x | | |
| | New Office Profiles Privacy tab allows Administrators to share anonymous usage data with Infor. Selecting this check box is optional. Data gathered will help Infor improve the product. | x | x | x | | |
| | Performance improvement: <ul style="list-style-type: none"> Inserting and updating GroupStatistics now uses the NHibernate IStatelessSession. | x | x | | | |
| | Contour <ul style="list-style-type: none"> Updated Google API key About tab provides information about the Contour feature. | x | x | x | | |

| Application | Feature | Requires | | | | |
|----------------------------------|--|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| | The Do not solicit field on the Contact Detail view is now selected by default. When creating a new contact, the default setting for the “Do Not Solicit” check box is now selected. 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 for contact records for customers in the system prior to upgrading to Infor CRM v8.4.0.1 are not impacted. | x | x | | | |
| For Back Office implementations: | | | | | | |
| | <p>Promotion Failure Notifications</p> <ul style="list-style-type: none"> ■ 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. <ul style="list-style-type: none"> ■ 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. | x | x | x | | |

| Application | Feature | Requires | | | | |
|-----------------------|--|-----------------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| | <p>Two Way Quotes and Sales Orders</p> <ul style="list-style-type: none"> ■ 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. | x | x | x | x | |
| | <p>ION Workflow Enhancements</p> <ul style="list-style-type: none"> ■ The following features have been added to support creating new ION Workflows: <ul style="list-style-type: none"> ■ 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. | x | x | x | | |
| Application Architect | | No new features | | | | |
| Windows Client | | No new features | | | | |

Issues fixed in this update

SNC Update 02 for Infor CRM version 8.4 addresses the following issues:

| Defect | Description |
|----------------|---|
| INFORCRM-5418 | On the Add Opportunity Product dialog box, clicking Add causes a script error to display. |
| INFORCRM-5440 | In a localized environment, on the Account detail view, the Description of Business lookup contains untranslated strings. |
| INFORCRM-5452 | In a translated environment, when editing a campaign code, the warning message contains untranslated strings. |
| INFORCRM-5508 | After editing an activity to change the contact, the Dashboard still displays the previously selected contact, not the updated contact. |
| INFORCRM-5807 | In a localized environment, the Account detail view Business Description label is not translated. |
| INFORCRM-5815 | On the Account detail view, dragging a tab to the user defined middle pane and clicking the scroll bar down arrow once causes the scroll bar to disappear. |
| INFORCRM-5903 | Notes created in the Infor CRM Web client that contain line breaks do not display correctly in the Windows client. |
| INFORCRM-5918 | In an environment with a Brasilia or Santiago time zone and Day Light Saving Time selected, the Administrator does not respond. |
| INFORCRM-5942 | When an activity is completed, two records are added to the HistoryAttendee table for the leader of the activity. |
| INFORCRM-7743 | Opening .jpg or .png Library files in the Administrator or Windows client causes the error "No application has been designated to open files of this type" to display. |
| INFORCRM-11507 | After assigning a ticket to a team, a separate e-mail opens for each member that has a defined e-mail address, but each e-mail message is addressed to the same team member. |
| INFORCRM-12339 | Under some conditions, running a report for a group may not include all of the records contained in the group. |
| INFORCRM-12887 | The Replace Data wizard is unable to find any matching records to replace even when a match does exist. |
| INFORCRM-13316 | In a German environment, if a user has an Outlook signature that contains an umlaut, the name will be corrupted if they use the scheduling an activity Invite Contact feature. |
| INFORCRM-14455 | When a user performs a mail merge to e-mail, the first e-mail alias in alphabetical order is used in the From: field rather than the default SMTP address and cannot be changed. |
| INFORCRM-19574 | In a Russian environment, the Sales Client help topic "Introducing Infor CRM" contains duplicate content. |
| INFORCRM-19575 | In a Russian environment, the Sales Client help topic "Introducing Infor CRM" is missing links to other help topics. |
| INFORCRM-19631 | In an Oracle environment, when creating a remote database, an error occurs in the step stpExecSQL_ CreateViews Microsoft SQL Native Client. The message "Incorrect syntax near 'BODMAPPINGID'." displays. |
| INFORCRM-19756 | The Conversion Utility conversion logic for "Update Master Data Consolidation" should include "SixLocation". |

| Defect | Description |
|----------------|---|
| INFORCRM-20669 | In a database where the Product table contains 500,000 or more records, navigating groups or detail view is very slow. Response times were 20 seconds or higher. |
| INFORCRM-20711 | If multiple Speedsearch Indexes are running at the same time the SLXSearchService.exe becomes unresponsive. |
| INFORCRM-21547 | When the Administrator option to set new contacts and leads to "Do not Solicit" is selected, creating a new contact and account causes the error "An Error occurred executing active form script (System:Add New ContactAccount) Error calling method cmdOkClick...". |
| INFORCRM-21632 | In the Administrator, importing users from a CSV file using a user template name that contains Cyrillic characters displays the template name with corrupted characters. |
| INFORCRM-21634 | In the Administrator, using Import Windows Users with a user template name that contains Cyrillic text displays the template name with corrupted characters. |
| INFORCRM-21673 | Selecting the Query Builder 'Return Distinct Rows Only' option causes the record counts in various groups to be incorrect. |
| INFORCRM-21732 | Altering tables does not restore triggers or function-based indexes. |
| INFORCRM-21830 | In a Microsoft Office 2019 64-bit environment, clicking Send to CRM to log an email as a history item fails to save any attachment to the contact's Attachments tab. |
| INFORCRM-21849 | When using Send to CRM with Xbar and the contact has a valid e-mail address, the Contact(s) Not found message displays. |
| INFORCRM-21900 | On the Accounts list view, if the user selects an account group with Cyrillic characters and adds an opportunity, in the Account lookup, if the Within Current Group/Lookup option is selected, the account lookup title contains corrupt characters. |
| INFORCRM-21938 | In the Administrator, importing users from an import file that contains Cyrillic characters fails. |
| INFORCRM-21939 | In a Russian environment, users cannot be imported in the Administrator. |
| INFORCRM-22001 | Cyrillic characters are corrupted in the Manage Resources dialog title bar. |
| INFORCRM-22101 | In a 64-bit Microsoft Office environment with Outlook integration enabled, users should not be prompted to log email to history. |
| INFORCRM-22195 | Activities in a custom tab cannot be deleted using the Application.BasicFunctions.DeleteActivity function. |
| INFORCRM-22236 | After upgrading to Microsoft Window 10, the Opportunity detail view Snapshot links no longer work. |
| INFORCRM-22250 | Cyrillic characters in the Administrator Edit Agent view do not display correctly. |
| INFORCRM-22254 | Cyrillic characters in the Architect Project Manager do not display correctly. |
| INFORCRM-22256 | Cyrillic characters in the Architect Manage Plugins view do not display correctly. |
| INFORCRM-22260 | The Architect New Secured Function name does not accept special or extended characters. |
| INFORCRM-22262 | Cyrillic characters in Architect Secured Function names do not display correctly. |
| INFORCRM-22278 | If an opportunity snapshot contains Unicode or multi-byte characters, when the opportunity information is copied to an email, those characters are corrupted. |
| INFORCRM-22336 | If date/time data exists in the database in a certain format, perhaps from an import in an earlier version, the record will error on update due to a mismatch between the datatypes of the field and the SQL call to check for the record to update. |

Issues fixed in previous updates

SNC Updates are cumulative, so SNC Update 02 for Infor CRM 8.4 contains fixes released in previous updates.

SNC Update 01 for Infor CRM version 8.4 addresses the following issues:

| Defect | Description |
|---------------|--|
| INFORCRM-5052 | Users cannot open attachments that they should have access to open. |
| INFORCRM-5053 | In the Mail Merge Email editor, inserted fields with display names that contain extended characters are corrupted. |
| INFORCRM-5054 | In the Mail Merge Email editor, the subject line does not display extended characters correctly. |
| INFORCRM-5063 | Notification e-mail sent when ticket ownership assigned to a team sends multiple notification e-mails to only one team member instead of listing each team member's email address. |
| INFORCRM-5441 | On the Campaign detail view, after clicking the Launched button, closing the dialog box causes the error "An error occurred executing active form script (System:Campaign Details)" to display. |
| INFORCRM-5443 | On the Account detail view, Details tab, clicking the Yearly Revenue Find button causes the error "Application uses a value of the wrong type for the current operation" to display. |
| INFORCRM-5449 | On the Opportunity detail view, the Reseller lookup icon should be the magnifying glass, not an ellipsis. |
| INFORCRM-5450 | When adding an opportunity from the Contact detail view, the contact in focus is added as the primary contact, but when a second contact is added and marked as primary both contacts are marked as primary. Only one contact can be the primary contact for an opportunity. |
| INFORCRM-5453 | On the Campaigns list view, clicking the Lead Sources column to sort, does not sort the list and causes two error messages to display. |
| INFORCRM-5455 | On the Standard Problem lookup sorting by the Description column does not sort the list. |
| INFORCRM-5460 | On the Lead Detail view, selecting Do not E-mail makes the e-mail address field read-only. |
| INFORCRM-5466 | In the Administrator, in a Chinese environment, the Users view displays corrupt characters when viewing Columns. |
| INFORCRM-5467 | In a Chinese environment, if a form has the QuickFindShowMore property set in Architect, when a lookup is performed from that view in the Windows client, and the More option is selected, some of the labels display corrupt characters. |
| INFORCRM-5473 | In the Rename Qualification Category dialog box, an error occurs after clicking Cancel. |
| INFORCRM-5504 | In a localized environment, when viewing the properties of a template, if the template name contains an umlaut, the Caption text does not display correctly. |
| INFORCRM-5506 | When editing a resource, the phone number and e-mail address of the user assigned to manage that resource should display. |
| INFORCRM-5509 | On the Activities view, after selecting Date Range from the drop-down list, switching to another tab causes the Date Range dialog box to reopen. |
| INFORCRM-5514 | In a Russian environment, on the Literature Requests Management view, selecting Group By Priority from the Groups list results in corrupt characters. |

| Defect | Description |
|----------------|--|
| INFORCRM-5516 | In a localized environment, on the Marketing tab, when a response is removed from a campaign, the Status "Removed" is not translated. |
| INFORCRM-5519 | In a localized environment, on the Assets tab extended characters in the Serial Number are corrupted. |
| INFORCRM-5522 | In a localized environment, when sending a notes or history record to email there are untranslated strings. |
| INFORCRM-5523 | In SpeedSearch, sorting the results by Subject, and then clicking the Next button causes the resulting record to display incorrectly. |
| INFORCRM-5525 | Selecting the last visible item on a scrolling pick list selects the wrong item. |
| INFORCRM-5528 | In a Russian or Italian environment, the Dashboard Options title is untranslated. |
| INFORCRM-5547 | The options for Web Action and Web Form should be removed from the Sales Process step creation as that functionality is no longer supported. |
| INFORCRM-5556 | Attachments on an activity should display on the Attachments tab for an associated contact. |
| INFORCRM-5557 | In the Saleslogix Setup Assistant License Wizard, clicking Next without adding a license causes the error "Access violation at address 00A32D18 in Module admin.exe. Read of address 00000000" to display. |
| INFORCRM-5562 | In the Database Manager, the right-click menu on a table record should have the option to Delete Table, not Delete View. |
| INFORCRM-5772 | Scheduling a follow-up activity with the Carryover Attachments option selected does not carry over the attachments from the original activity. |
| INFORCRM-5842 | In a Russian environment, a Sales Process Mail Merge Email step with Cyrillic characters in the Subject field will display corrupt characters. |
| INFORCRM-5848 | The Quick Find lookup does not display a list of recently viewed records as the user begins typing. |
| INFORCRM-5858 | Exporting a group to a DBASE IV file causes the Windows client to stop responding. |
| INFORCRM-5927 | On the Notes/History tab, if you right-click and select View History to view a history item with an attachment you cannot open the attachment. |
| INFORCRM-5972 | On the Activities view, pressing CTRL+ALT+DELETE and closing the Windows dialog box will prompt the user to confirm deletion of the activity. |
| INFORCRM-6006 | When editing an attachment to select a different file an error occurs. |
| INFORCRM-7464 | Renamed copies or new versions of existing plug-ins cannot be assigned to users after being released. |
| INFORCRM-7622 | When using Microsoft Excel x64 the File/Export Group to Excel menu option does not respond and there are no errors in the Windows Event Viewer. |
| INFORCRM-8224 | The Sales Dashboard displays an error and fails to open if an activity's priority contains any spaces. |
| INFORCRM-8342 | In a Multi-Currency environment, selecting the My Currency option on Opportunity Statistics causes an error. |
| INFORCRM-10197 | In a Russian environment, on the Contact detail view, after selecting a Title when the Edit Name dialog box is reopened, the Title is empty. |
| INFORCRM-10676 | If an attachment file name contains multiple periods, the Description is truncated. |
| INFORCRM-10835 | Using the Replace Data Wizard with certain group conditions returns errors. |

| Defect | Description |
|----------------|---|
| INFORCRM-11471 | A Sales Process generated activity for a selected user does not show up under that user's Sales Dashboard, My Activities section. |
| INFORCRM-11494 | In the Administrator, when granting a user access to another user's calendar the Add, Edit, Delete, and Sync values are not saved correctly. |
| INFORCRM-11605 | In a localized environment, Cyrillic user names are corrupted in Mail Merge History Options. |
| INFORCRM-11734 | In a localized environment, team names containing Cyrillic characters are corrupted on the Account Access screen. |
| INFORCRM-12005 | In the Query Builder Conditions tab, using Browse to select a User ID and typing characters to narrow the list narrows the list to User IDs that contain the typed characters, not the user's last name. |
| INFORCRM-12173 | In a Russian environment, in an Advanced Lookup, the title bar contains corrupt characters. |
| INFORCRM-12280 | In a Russian environment, the Query Builder Select Values dialog box contains corrupt characters. |
| INFORCRM-12317 | In the Account Advanced Lookup, the Sub-Type ellipsis button does not function. |
| INFORCRM-12334 | In the Administrator, sorting users by the Login column does not sort users by a status of logged in or not logged in. |
| INFORCMR-12351 | In an Oracle and Russian environment, viewing the SQL statement for a group contains corrupt characters. |
| INFORCRM-12461 | In a localized environment, the Keyword Search view contains untranslated strings. |
| INFORCRM-12738 | In the Windows client: when an account has more than 250 ticket records associated to it, the Tickets lookup group does not display properly. |
| INFORCRM-12794 | In the Windows client, dragging an activity to extend the ending time to midnight corrupts the activity. |
| INFORCRM-12822 | When a memo field is added to a form in the Architect and released, and a user enters information in the Windows Client, the list view for the memo does not display the second or above lines of text when the field is expanded. |
| INFORCRM-13099 | If an Area/Category/Issue is copied, the issue remains unchanged, and the option "Issue text must match a list option" is checked, when a ticket is edited to use the copied Area/Category/Issue, the ticket edits cannot be saved. |
| INFORCRM-13124 | When releasing a toolbar with the merge rule of Remove selected, the rule is ignored and both toolbars will be visible in the Windows Client . |
| INFORCRM-13260 | In a Japanese environment, if a user runs an Account Lookup for accounts that have Japanese names and selects the option to Create a temporary group containing all results only one record is returned and the group is empty. |
| INFORCRM-13279 | When creating, or editing a form with the OnResize Event, adding the Include Script for Dashboard: Content Set Support option causes nine (9) script errors in Architect when opening the form or resizing the form. |
| INFORCRM-14659 | In a localized environment, the Contact detail view contains truncated labels. |
| INFORCRM-14796 | In a localized environment, when merging account records there are overlapping labels. |
| INFORCRM-14798 | In a Russian environment, the Dashboard Options view contains truncated labels. |

| Defect | Description |
|----------------|--|
| INFORCRM-15505 | The Duplicate Record Confirmation results list does not contain enough information to merge. Account should be listed. |
| INFORCRM-16850 | In a localized environment, the Countries entries should be exposed for translation. |
| INFORCRM-17566 | A Mail Merge template with Unicode characters in the name does not display the name correctly. |
| INFORCRM-18147 | The Architect Find function on 'All Scripts' only searches scripts where the developer is Administrator. |
| INFORCRM-18296 | After creating a new ad hoc group, the group is not added to the group dropdown list until the current view is closed and reopened, |
| INFORCRM-18475 | On the Contact detail view, dragging and dropping the Process tab to the middle pane causes the Process tab to disappear and errors to display on the Contact detail view. |
| INFORCRM-18750 | A lookup with a datatype of Float returns an error message if a value is not specified. |
| INFORCRM-18851 | In a Russian environment, the Calendar uses the wrong case for month name translations. |
| INFORCRM-18939 | In a localized Windows environment, Cyrillic characters are corrupted in Check for Duplicates dialog box. |
| INFORCRM-19177 | In a localized environment, the Account Standing picklist "OK" item needs to be translated. |
| INFORCRM-19295 | In a Russian Windows client environment the Ruble symbol is corrupted. |
| INFORCRM-19309 | In the Windows client, when using the splitter in the Query Builder, check boxes such as 'Do not use sorts on Microsoft SQL Server' are not fixed and move position. This can lead to the box overlapping the tab grids. |
| INFORCRM-19485 | There is a typo in ContactExtension table index & primary key in Unicode-converted database. |
| INFORCRM-19503 | In a Russian environment, the Activity Duration does not contain Minute and Day abbreviations. |
| INFORCRM-19506 | In a localized environment, when deleting groups owned by a team containing Cyrillic characters, the Cyrillic characters will be corrupted in the warning message that displays prior to deletion. |
| INFORCRM-19606 | On a Remote Office license, the max number of group favorites is set to 0 by default, but should be set to 30. |
| INFORCRM-19625 | When the Infor CRM client consumes approximately 2 GB of RAM Out of Memory errors occur. |
| INFORCRM-19628 | In a localized environment, when installing a bundle in the Administrator, Cyrillic characters in the Access Violation error message are corrupted. |
| INFORCRM-19645 | Some picklists do not highlight the selected list item when scrolling through the list using the mouse wheel. |
| INFORCRM-19664 | In a Russian environment, the Ruble symbol does not display properly in edit boxes. |
| INFORCRM-19718 | The Windows taskbar thumbnail for the Infor CRM Windows client does not preview all open screens. |
| INFORCRM-19723 | In a Russian environment, the Deleted Message From contains corrupt characters. |

| Defect | Description |
|----------------|---|
| INFORCRM-19754 | In the Architect, a new Edit box ignores the font size setting |
| INFORCRM-19780 | If a user updates the Area - Category - Issue part of a ticket using the lookup against the Category: field, the Select Area - Category - Issue screen will later re-open when any other Ticket field is selected. |
| INFORCRM-19825 | Using the spell check feature on the Ticket Description field deletes the text if Microsoft Word is not installed. |
| INFORCRM-19940 | When an Offline Remote database is created some views are missing resulting in errors when the user first signs in to the Web Client. |
| INFORCRM-20022 | In Query Builder when assigning conditions using the Browse button there is a long delay before the results are shown. |
| INFORCRM-20034 | Mail Merge must be compatible with the Microsoft Store version of Microsoft Outlook. |
| INFORCRM-20055 | The Windows client must be compatible with the Microsoft Store version of Microsoft Outlook. |
| INFORCRM-20075 | In the Administrator, the User Profile Devices tab does not display any information. |
| INFORCRM-20135 | Updating an account address and selecting to update matching contact addresses updates addresses unrelated to the account or its contacts. |
| INFORCRM-20216 | In an Oracle environment, exporting a large group to Excel fails. |
| INFORCRM-20242 | Upgrading to version 8.4 drops database objects. |
| INFORCRM-20263 | If the CreateUnicodeDB utility fails when converting a table, it skips the remaining records in that table and continues the conversion on the remaining tables without stopping the conversion process or providing a notification that there was a failure. |
| INFORCRM-20344 | In an Oracle environment, when a new row is installed, the old row should be deleted. |
| INFORCRM-20428 | When converting a database to Unicode, you should not be able to name the new database the same as the old database because the old database will be deleted without warning. |
| INFORCRM-20448 | Selecting some regional settings may add an extra character to the Calendar date format. |
| INFORCRM-20475 | On the Contact Detail view, after minimizing and then maximizing the client, the tool bar at the top does not refresh and is inaccessible without refreshing the screen. |
| INFORCRM-20559 | If a user creates a group with multiple sort orders, under certain conditions all but the first sort order are ignored. |
| INFORCRM-20639 | In the Replace Data Wizard, the Whole Word filter does not work. |
| INFORCRM-20663 | If a group contains a join, clicking a column heading does not re-sort the group. |
| INFORCRM-20802 | If a user works in the Windows Client using two different Infor CRM databases that are different languages, the Mail Merge cache is not cleared between sessions and retains the language settings of the previous session. |
| INFORCRM-20904 | In a Russian environment, the Campaign entity contains corrupted characters in the Query Builder. |
| INFORCRM-20914 | In a Russian environment, after applying the Russian language pack, the Mail Merge New Template dialog box contains corrupted characters. |

| Defect | Description |
|----------------|---|
| INFORCRM-20920 | In a Russian environment, after applying the Russian language pack, adding a custom Data Color to the Query Builder will cause the Query Builder to stop working. |
| INFORCRM-20922 | In a Russian environment, after applying the Russian language pack, the Delete Mail Merge template confirmation prompt contains corrupted characters. |
| INFORCRM-20924 | When a non-admin user copies a system group, the Query Builder Calculations and Join buttons are available until the group is saved. |
| INFORCRM-20925 | When using the Copy button in the toolbar to copy an account name that contains Cyrillic characters, the name is corrupted when pasted into Notepad. |
| INFORCRM-20944 | When a Lead is created without a lead source, a LeadSourceID of 12 spaces is stored in the database which causes the error "No row with the given identifier exists." if the Lead Source is edited in the Web Client. |
| INFORCRM-20949 | When setting up Web Access to the Customer Portal for a contact the Windows client only allows up to 8 characters. |
| INFORCRM-20957 | In a Russian environment, if a user's name contains Cyrillic characters the name is corrupted in the Mail Merge Owner field. |
| INFORCRM-20969 | In a Russian environment, if a new user is created by copying the user profile of another User, any Cyrillic characters in that user's name are corrupted when using Mail Merge. |
| INFORCRM-20979 | In a Russian environment, calculated fields with Cyrillic names are corrupted in the Query Builder. |
| INFORCRM-21061 | After deleting an account, viewing and updating another account still shows the deleted account's information and causes an error. |
| INFORCRM-21071 | In the Architect, Cyrillic text is corrupted when entered in to the Table Properties. |
| INFORCRM-21095 | In the Architect, changes to the toolbars fonts are not visible in the Windows client. |
| INFORCRM-21250 | Adding a group condition to a lead group breaks the ability to navigate through multiple pages. |
| INFORCRM-21416 | In a Russian environment, entering Cyrillic text into the Employees field on Account detail view Details tab displays an error message with corrupt Cyrillic characters. |

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_v840_SNC_Update_02.zip | Infor_CRM_v840_SNC_Update_02.exe | |
| | Infor CRM v8.4.0 Update 02.sxb | |
| Infor_CRM_v840_SNC_Update_02.exe | Admin.exe | 8.4.0.2668 |
| | Architect.exe | 8.4.0.2668 |
| | CreateUnicodeDB.exe | 8.4.0.2668 |
| | DeveloperTips.chm | |
| | FixTriggers.exe | 8.4.0.2367 |
| | Microsoft.Data.Tools.Sql.BatchParser.dll | 15.1.18097.0 |
| | Microsoft.SqlServer.BatchParser.dll | 2018.150.1000.16 |
| | Microsoft.SqlServer.BatchParserClient.dll | 15.0.1000.16 |
| | Microsoft.SqlServer.ConnectionInfo.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.ConnectionInfoExtended.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Diagnostics.Strace.dll | 15.0.1000.16 |
| | Microsoft.SqlServer.Dmf.Common.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Dmf.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.Collector.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.CollectorEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.Dmf.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.RegisteredServers.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.Sdk.Sfc.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.SqlParser.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.Utility.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.UtilityEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.XEvent.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.XEventDbScoped.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.XEventDbScopedEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Management.XEventEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.PolicyEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.RegSvrEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.ServiceBrokerEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.Smo.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.SmoExtended.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.SqlClrProvider.dll | 15.0.18097.0 |

| File Name | File Contents | File Version |
|--------------------------------|--|------------------|
| | Microsoft.SqlServer.SqlEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.SqlTDiagn.dll | 15.0.100.16 |
| | Microsoft.SqlServer.SqlWmiManagement.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.SString.dll | 15.0.1000.16 |
| | Microsoft.SqlServer.Types.dll | 2018.150.1000.16 |
| | Microsoft.SqlServer.WmiEnum.dll | 15.0.18097.0 |
| | Microsoft.SqlServer.XE.Core.dll | 2018.150.1000.16 |
| | Microsoft.SqlServer.XEvent.Linq.dll | 2018.150.1000.16 |
| | PortalExplorer.chm | |
| | SalesLogix.exe | 8.4.0.2668 |
| | SLXControls.ocx | 8.4.0.2668 |
| | SLXDoc.dll | 8.4.0.2367 |
| | SLXLocal.exe | 8.4.0.2367 |
| | SLXMMEngine.dll | 8.4.0.2367 |
| | SLXMMGUI.dll | 8.4.0.2367 |
| | SLXOptions.dll | 8.4.0.2367 |
| | SLXSearchService.exe | 8.4.0.2668 |
| | SLXSpeedSearch.dll | 8.4.0.2367 |
| Infor CRM v8.4.0 Update 02.sxb | <p>Create Field</p> <ul style="list-style-type: none"> ■ SYSTEMINFO: COREVERSION varchar (64) Null ■ SYSTEMINFO: MODELVERSION varchar (64) Null ■ SYSTEMINFO: SNCVERSION varchar (64) Null | |
| | <p>Create Database Object Definition</p> <ul style="list-style-type: none"> ■ DB_OBJECTDEFINITION_DELETE_Duplicate_Ansi : Oracle ■ DROP_DUPLICATE_PICKLISTITEMVIEW : Oracle ■ DROP_DUPLICATE_PICKLISTVIEW : Oracle | |
| | <p>Execute SQL</p> <ul style="list-style-type: none"> ■ UPDATE sysdba.SYSTEMINFO set SNCVERSION = '8.4.0.02' | |
| | <p>Insert Plugin:</p> <ul style="list-style-type: none"> ■ Forms Account: Opportunities ■ Forms Account: Reseller Opportunities ■ Forms Account: Tickets ■ Forms Contact Web Access ■ Forms Dashboard: Manage Dashboard Options ■ Forms Lead: Marketing ■ Forms Sales Dashboard: Pipeline Status ■ Forms Sales Dashboard: Sales Dashboard Detail | |

| File Name | File Contents | File Version |
|-----------|---|--------------|
| | <ul style="list-style-type: none"> ■ Forms System: Account Detail ■ Forms System: Account QBE Screen ■ Forms System: Add Edit Qualification Category ■ Forms System: Campaign Detail ■ Forms System: Contact Detail ■ Forms System: Opportunity Reseller ■ Forms System: Insert Opportunity ■ Forms System: Lead Detail | |
| | <ul style="list-style-type: none"> ■ Forms System: Add New Contact Account ■ Forms System: Opportunity Statistics ■ Forms System: Opportunity Reseller ■ Forms System: Ticket Detail ■ Global Script System: Keyword Search ■ Global Script System: Opportunity Management ■ Main View System: Lead Details ■ Scripts, VBscript System: ACI Support ■ Scripts, VBscript System: Notes History Common ■ Scripts, VBscript System: SLX Lead Info ■ Scripts, VBscript System: SLX_Common ■ Scripts, VBscript System:SLX_Export_Group_To_Excel ■ Scripts, VBscript System:SLX Lead Info ■ Scripts, VBscript System: Spell Check | |

Chapter 2

Applying the Update

2

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

- Administrative Tools and Servers
- Remote Office
- Windows Client
- Remote Client



Install the Infor CRM v8.4.0 Update 02.sxb bundle using the Administrator.

Before installing the Infor CRM v8.4.0 Update 02.sxb bundle, review the files included in the update. Back up any customized files that may be affected, or back up the whole project if there are many files. Then, apply the update bundle in one of the following ways:

- Manually merge the update items with the customized items.
- Apply the bundle (overwriting all existing items), and then manually merge the customized items.

Installing the update

To begin the install

1. Close all Infor CRM applications on the computer to which you are applying the Update.
2. Extract the contents of the **Infor_CRM_v840_SNC_Update_02.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v840_SNC_Update_02.exe**.
4. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.

Automated installations can be used to install the Infor CRM Client for new users. When the automated installation is updated using this method, it contains the initial version of the Infor CRM Client and all service packs and updates applied to your system.

6. On the **Completed** screen, click **Finished**.

Finding script changes

Changes to 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 script changes in this release. Then, use that information to update your custom scripts with the changes, or add your customizations to the

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. 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 changes with your customizations.

Installing bundles using the Administrator

Use the Administrator to install the Infor CRM v8.4.0 Update 02 bundle.



Before installing the update bundle, create a bundle of all customized plugins in your database. Your customized plugins will not be overwritten, however, this bundle can be used as a backup of your customizations.

To install the bundle

1. Open the **Administrator**.
2. On the **Navigation Bar**, click **Bundles**.
3. Click **Install**.
4. Navigate to the folder where you extracted the Update files and double-click the bundle named **Infor CRM v8.4.0 Update 02.sxb**.
5. After the bundle is loaded, the **Choose Actions to Install** dialog box appears. View the plugins to be installed with this release, and then click **OK**.
6. During installation, click **Yes**, **Yes to All**, or **OK** on any confirmation message boxes for overwriting system plugins or indexes.
7. In the **Choose Teams** dialog box, select the teams to which you want to release plugins, and then click **OK**.