



Applying SNC Update 03 for Version 8.4

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Contents

Introduction	1
About this guide	1
Prerequisites	1
Contacting Infor	1
Chapter 1 Changes in this Update	3
Breaking Changes	3
Features added in this update	3
Features added in previous updates	9
Infor CRM v8.4.0.02 Features	9
Infor CRM v8.4.0.01 Features	10
Issues fixed in this update	13
Issues fixed in previous updates	14
File Information	22
Chapter 2 Applying the Update	25
Installing the update	25
Finding script changes	25
Installing bundles using the Administrator	26



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 03 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 03 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 03.

- 8.4 Update 03 is not supported with any version of Sync for Exchange earlier than Sync for Exchange v1.0.2. If your implementation includes Sync for Exchange, you must upgrade to Sync for Exchange v1.0.2 and 8.4 Update 03 at the same time.

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.

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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 03 for Version 8.4* document for details.

Features added in this update

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.

SNC Update 03 for Infor CRM 8.4 contains features released in previous updates.

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
8.4.0.03						
Web Client						
	Refreshed user interface	x	x	x		
	Quotas and Forecasting	x	x	x		
	<ul style="list-style-type: none">■ New Quota and Forecast views allow management of sales goals and tools to measure performance towards those goals.■ Users with the appropriate access may:<ul style="list-style-type: none">■ View, add, and manage quotas■ View, add, and manage forecasts■ Forecast Pipeline displays opportunity pipeline information segmented by criteria such as manager, country, or product.					
	<ul style="list-style-type: none">■ Opportunity Forecast Dashboard - enables users to see opportunity pipeline analytics in the form of charting and list widgets.					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> ■ New Opportunity groups: <ul style="list-style-type: none"> ■ Forecasted to Close in 30 Days or less ■ Forecasted to Close in 30 to 60 days ■ Forecasted 61 Days or more 					
	For Back Office implementations					
	<ul style="list-style-type: none"> ■ Enhancements for two-way Sales Order support with Cloud Suite Distribution (CSD) includes: 	x	x	x	x	
	<ul style="list-style-type: none"> ■ CRM based manual override of Shipping Charges ■ CRM based manual price overrides 					
	<ul style="list-style-type: none"> ■ Enhanced Quote, and Sales order, integrated snapshot summary 	x	x	x	x	
	<ul style="list-style-type: none"> ■ Enhanced M3 ProcessQuote BOD content 	x	x	x	x	
	Administration					
	<ul style="list-style-type: none"> ■ The User import automatically maps the user fields, so you no longer need to select a template or map fields. 	x	x	x		
	<ul style="list-style-type: none"> ■ New Financial Settings tab on the Office Profile to set options for Fiscal Year and Forecast and Quota periods. 	x	x	x		
	Custom Settings					
	<ul style="list-style-type: none"> ■ List view performance-related custom settings 	x	x			
	<ul style="list-style-type: none"> ■ GroupListBufferRows <ul style="list-style-type: none"> • The number of rows to keep ready on each side of the viewport area so that the user can perform local scrolling without seeing the grid being built. • Increasing this number can improve perceived performance when the data is being retrieved over a slow network. ■ GroupListFarOffRemoval <ul style="list-style-type: none"> • Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed. • Setting to Infinity causes rows to never be removed. 					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> ■ GroupListMaximumRowsPerPage <ul style="list-style-type: none"> • The maximum number of rows to request at one time. ■ GroupListMinimumRowsPerPage <ul style="list-style-type: none"> • The minimum number of rows to request at one time. 					
	<ul style="list-style-type: none"> ■ GroupListPagingDelay <ul style="list-style-type: none"> • Indicates the delay (in milliseconds) imposed upon paging method, to wait before paging in more data on scroll events. • This can be increased to reduce client-side overhead or the number of requests sent to a server. ■ GroupListPagingMethod <ul style="list-style-type: none"> • Method (from dgrid/util/misc) to use to either throttle or debounce requests. • Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests. • Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive. 					
	<ul style="list-style-type: none"> ■ GroupSummaryBufferRows <ul style="list-style-type: none"> • The number of rows to keep ready on each side of the viewport area so that the user can perform local scrolling without seeing the grid being built. • Increasing this number can improve perceived performance when the data is being retrieved over a slow network. ■ GroupSummaryFarOffRemoval <ul style="list-style-type: none"> • Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed. • Setting to Infinity causes rows to never be removed. 					
	<ul style="list-style-type: none"> ■ GroupSummaryPagingDelay <ul style="list-style-type: none"> • Indicates the delay (in milliseconds) imposed upon pagingMethod, to wait before paging in more data on scroll events. • This can be increased to reduce client-side overhead or the number of requests sent to a server. ■ GroupSummaryPagingMethod <ul style="list-style-type: none"> • Method (from dgrid/util/misc) to use to either throttle or debounce requests. • Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests. • Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive. 					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> ■ Back office integration custom settings 	x	x	x		
	<ul style="list-style-type: none"> ■ Read Only Quote On Promotion Set to True to prevent the modification of quotes for host systems like CSD, which do not support the promotion of updated CRM Quote content. ■ Block Quote For Non-Promoted Records Set to True to prevent the promotion of new quotes for host systems like CSD, which do not support the promotion of CRM quote content. ■ Block Quote For Promoted Records Set to True to prevent the promotion of updated quote content for host systems like CSD, which do not support the promotion of updated CRM quote content. ■ Read Only Sales Order On Promotion Set to True prevents the modification of promoted sales order content for host systems like CSD, which do not support the promotion of updated CRM Sales Order content. ■ Block Sales Order For Promoted Records Set to True prevents the promotion of modified sales order content for host systems like CSD, which do not support the promotion of updated Infor CloudSuite CRM Sales Orders. 					
	<ul style="list-style-type: none"> ■ Display snapshot shipping summary Set to True to display Shipping information in the Sales Order snapshot. The default value is False. ■ Include ERP Freight Rates Set to False to disable the CSD Freight Rate Shopping functionality for Infor CloudSuite CRM based Sales Orders. The default value is True. ■ Freight Reason Code Implementation-specific distributed charge freight reason code corresponding to the CSD-based CRM Freight Addon reason code. 					
	Roles					
	<ul style="list-style-type: none"> ■ Quotas & Forecasting Allows users to view quotas and view and manage forecasts. 	x	x	x		
	<ul style="list-style-type: none"> ■ Quota Management role Allows users to create and manage quotas. 	x	x	x		

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	Secured Actions					
	<ul style="list-style-type: none"> ■ Quotas and Forecasting 	x	x	x		
	<ul style="list-style-type: none"> ■ Entities/Forecast/Add <ul style="list-style-type: none"> • Allows the user to add forecast records. • This secured action is automatically included in the Quotas & Forecasting role. ■ Entities/Forecast/Delete <ul style="list-style-type: none"> • Allows the user to delete forecast records. • This secured action is automatically included in the Quotas & Forecasting role. ■ Entities/Forecast/Edit - <ul style="list-style-type: none"> • Allows the user to edit forecast records. • This secured action is automatically included in the Quotas & Forecasting role. ■ Entities/Forecast/View <ul style="list-style-type: none"> • Allows the user to access forecast views and records. • This secured action is automatically included in the Quotas & Forecasting role. ■ Entities/Quota/View <ul style="list-style-type: none"> • Allows the user to access quota views and records. • This secured action is automatically included in the Quotas & Forecasting and Quota Management roles. ■ Entities/Quota/Add <ul style="list-style-type: none"> • Allows the user to add quota records. • This secured action is automatically included in the Quota Management role. ■ Entities/Quota/Delete <ul style="list-style-type: none"> • Allows the user to delete quota records. • This secured action is automatically included in the Quota Management role. ■ Entities/Quota/Edit <ul style="list-style-type: none"> • Allows the user to edit quota records. • This secured action is automatically included in the Quota Management role. 					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> ■ Back Office integration 	x	x	x		
	<ul style="list-style-type: none"> ■ Entities/SalesOrder/OverridePricing <ul style="list-style-type: none"> • Allows the user to override the adjusted Sales Order unit price when editing a product. • This secured action is automatically included in the Standard User and Order and Quote Processor roles. ■ Entities/Quote/OverridePricing <ul style="list-style-type: none"> • Allow the user to override the adjusted Quote unit price when editing a product. • This secured action is automatically included in the Standard User and Order and Quote Processor roles. ■ Entities/SalesOrder/EditShippingCharge <ul style="list-style-type: none"> • Allows the user to override the shipping charge. • This secured action is automatically included in the Standard User and Order and Quote Processor roles. ■ Entities/Quote/EditShippingCharge <ul style="list-style-type: none"> • Allows the user to override the shipping charge. • This secured action is automatically included in the Standard User and Order and Quote Processor roles. 					
Application Architect	No new features					
Windows Client	No new features					

Features added in previous updates

Updates are cumulative. This section lists the features added in previous Infor CRM Updates for version 8.4.

Infor CRM v8.4.0.02 Features

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
8.4.0.02						
Web Client						
	<p>Marketo Partitioning</p> <p>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.</p>	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:					
	<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 set to False.</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:					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	(Sync for Exchange only) New Sync for Exchange integration custom setting "Complete Exchange Appointments", is disabled by default, but when enabled synchronizes all completed appointment between Infor CRM and Exchange.	x	x			
	(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					

Infor CRM v8.4.0.01 Features

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
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			

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	Contour <ul style="list-style-type: none"> ■ Updated Google API key ■ About tab provides information about the Contour feature. 	x	x	x		
	When creating a new contact, the Do not Solicit, Do not Email, Do not Call, Do not Mail, and Do not Fax fields are now selected by default. These check boxes will be selected when viewing the contact's detail view. This change was made to provide a process to support compliance with GDPR. This only applies to new contact records. Settings for the Do not Solicit check box and sub-check boxes for contact records for customers in the system prior to upgrading to Infor CRM v8.4.0.1 are not impacted.	x	x			
	For Back Office implementations:					
	Promotion Failure Notifications <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 03 for Infor CRM version 8.4 addresses the following issues:

Defect	Description
INFORCRM-5158	The Query Builder, Select Values screen has overlapping buttons.
INFORCRM-7657	Remote databases cut on Administrative Workstations are not properly formed.
INFORCRM-17122	In the Window client, opening the Dialer from the Tools menu, Dial Phone option causes an error.
INFORCRM-20711	SLXSearchService.exe becomes unresponsive when multiple Speedsearch Indexes are running at the same time.
INFORCRM-21769	In an Oracle environment, the SlxSearchService fails to release memory and stops after reaching the 32bit RAM limit which occurs between 1.6 and 1.9 GB, which terminates indexing and leaves some records unindexed.
INFORCRM-22470	The Administrator stops working when trying to add a user to a team.
INFORCRM-22493	In the Administrator, applying subscription rule causes the error: "Exception EJclStringHashMapError: Duplicate has list entry: AA2EK0014300 Exception location: [006030D5]{Admin.exe}" to display.
INFORCRM-22615	In an environment using the currency GBP, mail merge currency values are displaying an Â character, for example Â£960.00.
INFORCRM-22633	The Address Map icon does not open a map of the address.
INFORCRM-22637	The Windows client tBrowser control in compatibility mode causes issues when accessing certain websites.
INFORCRM-22678	On the Account detail view, sorting attachments causes an error and the list of attachments is no longer visible.
INFORCRM-22705	In a Windows 10 environment, the Write menu Templates and Mail Merge menu items may not be available.
INFORCRM-22743	On the Windows client, Campaign detail view, Targets tab, Manage Targets, sorting on the Company columns does not sort the list.
INFORCRM-23122	If a user with Cyrillic characters in their name and is set as a Manager for other users, the Administrator will display an error that the users do not have a manager defined. The error message contains the user's name but the Cyrillic characters are corrupted.
INFORCRM-23137	When Exporting to Excel, Cyrillic characters in any Contact phone fields are corrupted.
INFORCRM-23182	If a Manage Form name contains Cyrillic characters, upon testing the form, the resulting error contains corrupted characters.
INFORCRM-23329	If an address contains Unicode characters and the map icon is clicked, the map does not display.
INFORCRM-23496	If the Save attachments with .msg option is selected within the Administrator, dragging and dropping E-mails that contain attachments should not be saved as a .tmp file.
INFORCRM-23497	Installing an older .sxb bundle in the Administrator displays an error "Invalid column name 'ENCODING'.

Defect	Description
INFORCRM-23588	SLXServer.exe Memory leak may lead to memory exhaustion.
INFORCRM-23589	In version 8.4.0.2, cutting remote databases fails with the error 'Step: stpExecSQL_ExecSqlTask0 returned error: Incorrect syntax near the keyword 'UPDATE'.

Issues fixed in previous updates

SNC Updates are cumulative, so SNC Update 03 for Infor CRM 8.4 contains fixes released in previous updates.

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.

Defect	Description
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 <code>stpExecSQL_ CreateViews</code> 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 "SlxLocation".
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 <code>SLXSearchService.exe</code> 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 <code>cmdOkClick...</code> ".
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 <code>Application.BasicFunctions.DeleteActivity</code> 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.

Defect	Description
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.

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.

Defect	Description
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.
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.

Defect	Description
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.
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 .

Defect	Description
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.
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.

Defect	Description
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.
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.

Defect	Description
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.
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_03.zip .exe		
	Infor_CRM_v840_SNC_Update_03.exe	
	Infor CRM v8.4.0 Update 03.sxb	
Infor_CRM_v840_SNC_Update_03.exe		
	Admin.exe	8.4.0.3159
	Architect.exe	8.4.0.3159
	ConversionUtility_8.4.0.x.exe	8.4.0.3159
	ConversionUtility_8.4.0.x.exe.config	
	CreateUnicodeDB.exe	8.4.0.3159
	DeveloperTips.chm	
	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

File Name	File Contents	File Version
	Microsoft.SqlServer.SqlClrProvider.dll	15.0.18097.0
	Microsoft.SqlServer.SqlEnum.dll	15.0.18097.0
	Microsoft.SqlServer.SqlTDiagm.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	8.4.0.3159
	SLdialer.exe	8.4.0.3159
	SLXControls.ocx	8.4.0.3159
	SLXDoc.dll	8.4.0.2367
	SLXLocal.exe	8.4.0.2367
	SLXMMEngine.dll	8.4.0.3159
	SLXMMGUI.dll	8.4.0.2367
	SLXOptions.dll	8.4.0.2367
	SLXSearchDataSource.dll	8.4.0.3159
	SLXSearchService.exe	8.4.0.3159
	SLXServer.exe	8.4.0.3159
	SLXSpeedSearch.dll	8.4.0.2367
Infor CRM v8.4.0 Update 03.sxb		
	Create Field <ul style="list-style-type: none"> ■ SYSTEMINFO: COREVERSION varchar (64) Null ■ SYSTEMINFO: MODELVERSION varchar (64) Null ■ SYSTEMINFO: SNCVERSION varchar (64) Null 	
	Create Database Object Definition <ul style="list-style-type: none"> ■ DB_OBJECTDEFINITION_DELETE_Duplicate_Ansi : Oracle ■ DROP_DUPLICATE_PICKLISTITEMVIEW : Oracle ■ DROP_DUPLICATE_PICKLISTVIEW : Oracle 	
	Execute SQL <ul style="list-style-type: none"> ■ UPDATE sysdba.SYSTEMINFO set SNCVERSION = '8.4.0.03' 	

File Name	File Contents	File Version
	Insert Plugin: <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 	
	<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: Manage Targets ■ Forms System: Add New Contact Account ■ Forms System: Opportunity Statistics ■ Forms System: Opportunity Reseller ■ Forms System: Ticket Detail ■ Forms System: SLX Report Manager View ■ 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 Address Common ■ Scripts, VBscript System: SLX Lead Info ■ Scripts, VBscript System: SLX_Common ■ Scripts, VBscript System: SLX Crystal Report ■ Scripts, VBscript System: SLX_Export_Group_To_Excel ■ Scripts, VBscript System: SLX Lead Info ■ Scripts, VBscript System: SLX Report Controller ■ 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 03.sxb bundle using the Administrator.

Before installing the Infor CRM v8.4.0 Update 03.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_03.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_03.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 03 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 03.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**.