



# Applying Web Model Update 03 for Version 8.4

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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 Web Model Update 03 for Infor CRM version 8.4.

## Prerequisites

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

- Infor CRM version 8.4
- 8.4 SNC Update 03
- 8.4 Web Core Update 03

If you intend to install only the Core update, your environment must be configured to use the Virtual File System (VFS). If your environment is configured using the Local File System (LFS), you must also apply 8.4 Web Model Update 03, including the steps for updating and merging the tenant.config file.



Do not install Web Model Update 03 for Infor CRM 8.4 on any other Infor CRM version.



Web Model Updates are cumulative. You do not need to install earlier Web Model updates before installing Web Model 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://conciierge.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](mailto:documentation@infor.com).

# Chapter 1

## Changes in this Update

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

### 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.

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"> <li>■ New Quota and Forecast views allow management of sales goals and tools to measure performance towards those goals.</li> <li>■ Users with the appropriate access may:               <ul style="list-style-type: none"> <li>■ View, add, and manage quotas</li> <li>■ View, add, and manage forecasts</li> </ul> </li> </ul>					
	<ul style="list-style-type: none"> <li>■ Forecast Pipeline displays opportunity pipeline information segmented by criteria such as manager, country, or product.</li> </ul>					
	<ul style="list-style-type: none"> <li>■ Opportunity Forecast Dashboard - enables users to see opportunity pipeline analytics in the form of charting and list widgets.</li> </ul>					
	<ul style="list-style-type: none"> <li>■ New Opportunity groups:               <ul style="list-style-type: none"> <li>■ Forecasted to Close in 30 Days or less</li> <li>■ Forecasted to Close in 30 to 60 days</li> <li>■ Forecasted 61 Days or more</li> </ul> </li> </ul>					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	For Back Office implementations					
	<ul style="list-style-type: none"> <li>■ Enhancements for two-way Sales Order support with Cloud Suite Distribution (CSD) includes:                             <ul style="list-style-type: none"> <li>■ CRM based manual override of Shipping Charges</li> <li>■ CRM based manual price overrides</li> </ul> </li> </ul>	x	x	x	x	
	<ul style="list-style-type: none"> <li>■ Enhanced Quote, and Sales order, integrated snapshot summary</li> </ul>	x	x	x	x	
	<ul style="list-style-type: none"> <li>■ Enhanced M3 ProcessQuote BOD content</li> </ul>	x	x	x	x	
	Administration					
	<ul style="list-style-type: none"> <li>■ The User import automatically maps the user fields, so you no longer need to select a template or map fields.</li> </ul>	x	x	x		
	<ul style="list-style-type: none"> <li>■ New Financial Settings tab on the Office Profile to set options for Fiscal Year and Forecast and Quota periods.</li> </ul>	x	x	x		
	Custom Settings					
	<ul style="list-style-type: none"> <li>■ List view performance-related custom settings                             <ul style="list-style-type: none"> <li>■ GroupListBufferRows                                     <ul style="list-style-type: none"> <li>• 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.</li> <li>• Increasing this number can improve perceived performance when the data is being retrieved over a slow network.</li> </ul> </li> <li>■ GroupListFarOffRemoval                                     <ul style="list-style-type: none"> <li>• Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed.</li> <li>• Setting to Infinity causes rows to never be removed.</li> </ul> </li> </ul> </li> </ul>	x	x			
	<ul style="list-style-type: none"> <li>■ GroupListMaximumRowsPerPage                             <ul style="list-style-type: none"> <li>• The maximum number of rows to request at one time.</li> </ul> </li> <li>■ GroupListMinimumRowsPerPage                             <ul style="list-style-type: none"> <li>• The minimum number of rows to request at one time.</li> </ul> </li> </ul>					



Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> <li>■ <b>GroupListPagingDelay</b> <ul style="list-style-type: none"> <li>• Indicates the delay (in milliseconds) imposed upon paging method, to wait before paging in more data on scroll events.</li> <li>• This can be increased to reduce client-side overhead or the number of requests sent to a server.</li> </ul> </li> <li>■ <b>GroupListPagingMethod</b> <ul style="list-style-type: none"> <li>• Method (from dgrid/util/misc) to use to either throttle or debounce requests.</li> <li>• Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests.</li> <li>• Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive.</li> </ul> </li> </ul>					
	<ul style="list-style-type: none"> <li>■ <b>GroupSummaryBufferRows</b> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Increasing this number can improve perceived performance when the data is being retrieved over a slow network.</li> </ul> </li> <li>■ <b>GroupSummaryFarOffRemoval</b> <ul style="list-style-type: none"> <li>• Defines the minimum distance (in pixels) from the visible viewport area rows must be in order to be removed.</li> <li>• Setting to Infinity causes rows to never be removed.</li> </ul> </li> </ul>					
	<ul style="list-style-type: none"> <li>■ <b>GroupSummaryPagingDelay</b> <ul style="list-style-type: none"> <li>• Indicates the delay (in milliseconds) imposed upon pagingMethod, to wait before paging in more data on scroll events.</li> <li>• This can be increased to reduce client-side overhead or the number of requests sent to a server.</li> </ul> </li> <li>■ <b>GroupSummaryPagingMethod</b> <ul style="list-style-type: none"> <li>• Method (from dgrid/util/misc) to use to either throttle or debounce requests.</li> <li>• Default is "debounce" which will cause the grid to wait until the user pauses scrolling before firing any requests.</li> <li>• Can be set to "throttleDelayed" instead to progressively request as the user scrolls, which generally incurs more overhead but might appear more responsive.</li> </ul> </li> </ul>					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> <li>■ Back office integration custom settings</li> </ul>	x	x	x		
	<ul style="list-style-type: none"> <li>■ 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.</li> <li>■ 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.</li> <li>■ 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.</li> <li>■ 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.</li> <li>■ 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.</li> </ul>					
	<ul style="list-style-type: none"> <li>■ Display snapshot shipping summary Set to True to display Shipping information in the Sales Order snapshot. The default value is False.</li> <li>■ 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.</li> <li>■ Freight Reason Code Implementation-specific distributed charge freight reason code corresponding to the CSD-based CRM Freight Addon reason code.</li> </ul>					
	Roles					
	<ul style="list-style-type: none"> <li>■ Quotas &amp; Forecasting Allows users to view quotas and view and manage forecasts.</li> </ul>	x	x	x		
	<ul style="list-style-type: none"> <li>■ Quota Management role Allows users to create and manage quotas.</li> </ul>	x	x	x		

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

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<ul style="list-style-type: none"> <li>■ Back Office integration</li> </ul>	x	x	x		
	<ul style="list-style-type: none"> <li>■ Entities/SalesOrder/OverridePricing                             <ul style="list-style-type: none"> <li>• Allows the user to override the adjusted Sales Order unit price when editing a product.</li> <li>• This secured action is automatically included in the Standard User and Order and Quote Processor roles.</li> </ul> </li> <li>■ Entities/Quote/OverridePricing                             <ul style="list-style-type: none"> <li>• Allow the user to override the adjusted Quote unit price when editing a product.</li> <li>• This secured action is automatically included in the Standard User and Order and Quote Processor roles.</li> </ul> </li> <li>■ Entities/SalesOrder/EditShippingCharge                             <ul style="list-style-type: none"> <li>• Allows the user to override the shipping charge.</li> <li>• This secured action is automatically included in the Standard User and Order and Quote Processor roles.</li> </ul> </li> <li>■ Entities/Quote/EditShippingCharge                             <ul style="list-style-type: none"> <li>• Allows the user to override the shipping charge.</li> <li>• This secured action is automatically included in the Standard User and Order and Quote Processor roles.</li> </ul> </li> </ul>					
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
<b>8.4.0.01</b>						
Web Client	New Help About box: <ul style="list-style-type: none"> <li>In 8.4 and earlier, the Help&gt;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&gt;About box to ensure the accurate version number is available.</li> </ul>	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"> <li>Inserting and updating GroupStatistics now uses the NHibernate IStatelessSession.</li> </ul>	x	x			

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	Contour <ul style="list-style-type: none"> <li>■ Updated Google API key</li> <li>■ About tab provides information about the Contour feature.</li> </ul>	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"> <li>■ 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"> <li>■ A Ming.le task can be generated to the user who last worked on the record.</li> <li>■ An email can be sent and the task escalated if it is not assigned or completed.</li> <li>■ Auto cancellation of outstanding task is possible if an attempt is made to sync data.</li> <li>■ These actions do not impact the record itself.</li> </ul> </li> </ul>	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"> <li>■ 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.</li> <li>■ In an integrated environment, the Products now includes a location lookup and filtered product lookups.</li> </ul>	x	x	x	x	
	<p>ION Workflow Enhancements</p> <ul style="list-style-type: none"> <li>■ The following features have been added to support creating new ION Workflows: <ul style="list-style-type: none"> <li>■ Users with appropriate permissions can create new workflows by copying and editing existing workflows.</li> <li>■ New workflows created by copying are automatically given a unique workflow name.</li> <li>■ New workflows are set to inactive and the auto trigger is set to false by default.</li> </ul> </li> </ul>	x	x	x		
Application Architect	No new features					
Windows Client	No new features					



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



## Issues fixed in this update

Web Model Update 03 for Infor CRM version 8.4 addresses the following issues:



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

Defect	Description
INFORCRM-16451	In the IONWorkflow definition the character limit for Approver Email should be increased from 64 to 1024 characters.
INFORCRM-16763	The event log entry of "WARN BOEJobs - Normalize Base Currency Values Custom setting is not enabled. Normalization of base currencies to CRM base currency skipped" is generated for each BOD processed when the new Normalize Base Currency option is disabled should be removed.
INFORCRM-17780	The Quote and SalesOrder business rules should be updating a null price or null Extended price based on the corresponding base current based values contained in the CalculatedPrice property.
INFORCRM-20918	When using multi-currency, quotes display incorrectly if using a different currency than the base currency.
INFORCRM-20942	In an ICAA environment, when signed in as a non-admin user, viewing analytics causes the message "Sorry you are not authorized to access the analytics system" to display.
INFORCRM-21349	On the Quote detail view Products tab, the Re-Number Line Items button does not renumber the list items.
INFORCRM-22122	After changing the Language Selection in Infor Ming.le User Profiles, subsequent language changes are not saved.
INFORCRM-22148	The Sync for Exchange Integration allows the creation of multiple links for the same user and/or same Exchange mailbox in the APPIDMAPPING table which prevents users from logging into the Web Client as the program is expecting one entry per user, per integration.
INFORCRM-22486	On the Sales Order detail view, the Description field should be removed.
INFORCRM-22571	In the Mobile client, when Accounts Nearby returns more than 100 results, the results are not in order by proximity.
INFORCRM-22609	Users created in Ming.le are assigned security roles, and each role is listed twice for Infor CRM Users and when selecting an owner for accounts or leads, each user is listed twice.
INFORCRM-22614	The CommonTasksTasklet makes unnecessary calls to BusinessRuleHelper.IsGeocodeEnabled() which impacts performance.
INFORCRM-22715	(ICBOE) In a localized environment, products cannot be added to quotes or sales orders.
INFORCRM-22906	In a Marketo integrated environment, rows should not be logged in Marketo Session log for disabled jobs.

Defect	Description
INFORCRM-22926	On the Office Profile, Security tab, updates to the Minimum Password Length option do not save.
INFORCRM-22983	(ICBOE) In an integrated environment with Price and Availability configured, the SalesOrder.Rules.cs OnBeforeUpdate(), SetGrandTotal(), GetSalesOrderDocGrandTotal(), should not overwrite the GetOrderTotal returned DocGrandTotal value.

## Issues fixed in previous updates

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

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



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

Defect	Description
INFORCRM-12240	In the Insert Ticket Activity dialog box, using the Tab key to move through the fields only works for the first few times.
INFORCRM-16524	In a localized environment, the Query Builder Add/Edit Join dialog box contains untranslated strings.
INFORCRM-19245	After adding a new quote or sales order, changes to the currency on the detail view are not saved when the Save button is clicked.
INFORCRM-19332	In a localized environment some navigation bar items contain corrupt characters.
INFORCRM-19702	The Lead detail view CommonTasks section is missing the "Add Response to Campaign" option.
INFORCRM-19976	When merging accounts, "occurred" is misspelled in an error message.
INFORCRM-19998	In the Check for Duplicates dialog box an error occurs after clicking the Advanced Match Options button.
INFORCRM-20103	The web.config file is missing the requestFiltering section for the maxAllowedContentLength setting needed for changing the max attachment size.
INFORCRM-20281	In a localized environment, on the Integration detail view, the Link Type field does not display the value System correctly.
INFORCRM-20434	When importing leads, selecting the Timeless option sets the import start time back by 1 day.
INFORCRM-20496	When adding or editing a ticket activity the part lookup does not close once a product is selected and Add Selected is clicked.
INFORCRM-20637	Opening the Opportunity detail view and then opening SpeedSearch creates a duplicate record of the opportunity.
INFORCRM-20658	The SetMingleContext.aspx page should not be cached, because it is used as part of the Mingle initialization process.
INFORCRM-20659	The Login.aspx page should never delete the SixStickySessionId cookie.
INFORCRM-20800	In Customer Portal, custom pick lists do not support type ahead functionality.
INFORCRM-20946	Pick List controls with StorageMode set to Code do not save a typed-in value.

Defect	Description
INFORCRM-21018	Removing a user from nested teams causes IIS to crash.
INFORCRM-21107	When an opportunity status is equal to Closed-Won or Closed-Lost the Snapshot fields should be read-only like all of the other detail view fields.
INFORCRM-21213	On the Ticket detail view, if a user has unsaved changes and leaves the page the user may not be prompted and the changes will be lost.
INFORCRM-21234	On the dashboard, clicking the View Group link causes an error to display.
INFORCRM-21251	In the Entity Manager, on the Shipments entity Filter tab, the Actual Ship Date filter is filtering on the wrong field.
INFORCRM-21276	(ICBOE) In an integrated environment, SYNC DIRECTION values are translated which breaks BOD mapping rules.
INFORCRM-21308	In an Internet Explorer environment, deleting a pick list item should prompt the user "Are you sure you want to delete?" before the pick list item is deleted.
INFORCRM-21346	Performing a bulk update that changes the account owner should update the ownership of associated tickets.
INFORCRM-21367	In an environment with Windows Authentication configured, opening hyperlinks to Infor CRM from Microsoft Office products (Excel, Word, Outlook) causes an error to display.
INFORCRM-21372	In a Ming.le environment, in Picklist manager, selecting a picklist causes an object reference error.
INFORCRM-21409	In a French environment, Contour Show on Map does not work.
INFORCRM-21428	The ION Workflow Definition Approver Email List should allow more than 64 characters.
INFORCRM-21452	When a default sales process is selected in the Tools, Options, Opportunities tab, the user cannot change the Opportunity detail view Sales Process field to blank, it keeps defaulting back to the default Sales Process.
INFORCRM-21460	In a Marketo integrated environment, the Lead Sales Insights tab Person Score is not getting updated.
INFORCRM-21466	In the Picklist detail view, selecting a default pick list item does not apply successfully and the changes are not retained.
INFORCRM-21515	When using the SaleslogixUserImport.CSV file to import users, some fields do not automatically map and some fields cannot be mapped because there are no available matching fields.
INFORCRM-21532	Using the SaleslogixUserImport.CSV file field to import users results in missing settings and user records that contain errors when validated in the Integrity Checker.
INFORCRM-21618	(ICBOE) In a French integrated environment, user triggered outbound requests cause the error "Requested value; User Triggered; was not found".
INFORCRM-21671	If an opportunity created without a sales process is viewed by a user who has a default sales process defined, the opportunity sales process is updated to that user's default value.
INFORCRM-21706	Under specific scenarios, when opening a ticket from a group, and then adding a ticket activity, the user is returned to the Lookup results group, not the group the ticket was accessed from.
INFORCRM-21708	On the Tools, Options, Group tab the Default Group and Default Lookup Layout lookups show the Display Name but are sorted by Name.

Defect	Description
INFORCRM-21889	On the Calendar, an activity start time is shown in 24-hour format in the day, work week, and week views but in the month view the start time is shown in 12-hour AM/PM format.
INFORCRM-21906	(ICBOE) In an integrated environment with Local Pricing, if a user edits an opportunity, quote, or sales order product's price and quantity the extended price is not updated.
INFORCRM-21981	Editing the Add to Forecast checkbox on the Opportunity detail view without saving the changes does not warn users of unsaved changes when they leave the record.
INFORCRM-21981	On the Opportunity detail view, editing the "Add to Forecast" checkbox without saving and leaving the page does not prompt the the user and the change will be lost.
INFORCRM-22008	On the Campaign detail view, editing a stage or step causes an error to display.
INFORCRM-22037	The Opportunity Detail report will only show the first note under the Notes/History tab for a new opportunity.
INFORCRM-22058	In a Ming.le environment, using an Edge browser, after performing a Speedsearch, the results cannot be opened.
INFORCRM-22060	In a Ming.le environment, using an Edge browser, after performing a Speedsearch, in the results list, clicking an account link for a record that is not an account, for example a contact, opens the Account detail view in a new browser window, not the Ming.le frame.
INFORCRM-22070	In a Ming.le environment, an error occurs when attempting to add picklist items to a picklist.
INFORCRM-22090	(ICBOE) In an integrated environment, promoting a quote or sales order with unsaved changes results in incomplete or outdated content published to the host ERP system.
INFORCRM-22094	In the Opportunity detail view Products tab, users should not be able to enter non-numeric characters for the product Quantity field in either the grid or the Edit Opportunity Product dialog box.
INFORCRM-22264	Users with the Administrator role cannot save custom settings.
INFORCRM-22376	Cookies that store information distinct to a web application should not be shared with other web applications.
INFORCRM-22476	In a localized environment the Opportunity detail view Opportunity Statistics dialog box contains untranslated strings.
INFORCRM-22509	Users are not getting the unsaved data prompt when Navigating from the Ticket detail view to the Edit Ticket Activity view with unsaved changes does not trigger the unsaved changes prompt.
INFORCRM-22551	The dashboard "Visit the Infor CRM Website" link does not work.

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



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

Defect	Description
INFORCRM-4440	Stages picklist on Sales Process tab is null.
INFORCRM-5148	In the Campaign Summary view, the Targets and Responses lists are empty,
INFORCRM-5555	Pressing the ESC key to close a dialog box opened from a tab, switching to a different tab, and then opening another dialog box causes an error.
INFORCRM-5806	When dragging or dropping a file attachment to a recurring meeting, the error "The data in one or more fields has exceeded its limit. HTTP status: Internal Server Error (500)" occurs.
INFORCRM-5821	On the Opportunity detail view Products tab, after deleting a product, when editing remaining products in the grid the adjusted price and quantity do not display any data.
INFORCRM-5834	In the Edit Product dialog box, after editing the price, the Adjusted Price value is calculated incorrectly upon tabbing into another field.
INFORCRM-5924	When editing a product, editing the Adjusted Price (User) instead of the Adjusted Price (Base) causes incorrect price conversion.
INFORCRM-5928	In the Tickets list view, the date field shows a date 1 day later than the actual date.
INFORCRM-5956	On the Campaign detail view, when updating a selected target to add a response, clicking the Lead Source find button does not return any records.
INFORCRM-5959	When adding an opportunity, removing more than one product causes the Web Client to stop responding.
INFORCRM-5968	When editing a product, after editing the Adjusted Price (User) value, the value entered is doubled upon leaving the field, which also affects the calculated Adjusted Price (Base).
INFORCRM-5992	"An item with the same key has already been added" error occurs when user closes the form by pressing ESC key.
INFORCRM-6005	When copying sales order details to an e-mail, duplicate contact email addresses are added to the To: field.
INFORCRM-6070	On the Defect detail view, when adding a return or ticket that is already associated with the defect, an error occurs.
INFORCRM-6072	When deleting a defect task, an error occurs.
INFORCRM-7073	Text fields added in the Form Designer cannot be populated or edited by users.
INFORCRM-7928	Web Client Library does not display more than 200 folders in the Library.
INFORCRM-8056	User Tasks on the Users list view are not accessible to users that are assigned to the Admin role.
INFORCRM-8131	When emailing the details of a ticket, the My Manager field does not display the signed in user's defined manager.
INFORCRM-8226	A ticket activity end time can be earlier than the start time.
INFORCRM-10117	The Dashboard funnel widget fails to load opportunity data if the opportunity is associated with a custom sales process.
INFORCRM-10207	If auditing is enabled on TicketSolution or TicketProblem entities, upon updating a ticket's Resolution field, the error "'Unable to cast object of type 'Sage.Saleslogix.Entities.TicketSolution' to type 'Sage.Entity.Interfaces.ITicket'" occurs.
INFORCRM-10772	Importing Leads does not populate the Address Type field even when the Address Type field is mapped to a field in the import file.

Defect	Description
INFORCRM-11054	Fulfilling a literature request results in the error 'There was an unexpected error in ExecuteMaiMerge(). There was an Unexpected error. Type mismatch. Details: name=TypeError; number=2146828275'.
INFORCRM-12783	Cannot clear and select Case Sensitive Compare checkbox in the assign condition form.
INFORCRM-13028	When adding an account and contact, braces '{} are inserted around the entity ID which causes a 404 error.
INFORCRM-13464	On the Campaign detail view Targets tab, clicking Refresh displays the "unsaved data" message.
INFORCRM-16131	On the Contact detail view, Addresses tab, the Edit Contact Address Description drop-down list only has one option.
INFORCRM-16674	On the Ticket detail view, Ticket Activity tab, the Type and Public columns represent the value of Internal or Customer but in the Ticket Activity grid those columns show the ID values instead of the text values.
INFORCRM-16824	On the Contact detail view, unsaved changes to check boxes do not produce the unsaved data prompt.
INFORCRM-17068	The Office Profile, Groups tab is missing the Save button.
INFORCRM-17071	Using a comma in Area / Category / Issue causes everything after the comma to not display.
INFORCRM-17298	When a SpeedSearch query returns attachments or Library files that are stored in a different domain, a "Page not Found" error displays.
INFORCRM-17995	An opportunity should not be moved to a different account.
INFORCRM-18137	On the Import History details view, the Detail Report common task should be removed.
INFORCRM-18234	Some Administrative roles with View access allow edits to be made.
INFORCRM-18438	In a German environment, in Query Builder Boolean field format results are not translated.
INFORCRM-18490	When resolving duplicate accounts, on the Merge Contacts page if contacts are not merged, the "Next" button finalizes the merge, there is no other page. There should be an additional page with a Merge button as there is when contacts are merged.
INFORCRM-18755	Editing Picklists in Web Client creates duplicate picklist items.
INFORCRM-18987	The word "occurred" is misspelled in multiple strings.
INFORCRM-19007	Unable to schedule an activity on the Contour Account Search view if the Account has double quotes in its name.
INFORCRM-19026	In the web resource file, the string value should be ION Workflow Name.
INFORCRM-19076	When inserting an opportunity, if the account is changed, then the Opportunity Description no longer displays.
INFORCRM-19101	The string <value>Invalid value for required of type</value> should be <value>An invalid value was provided for one of the supplied parameters</value>.
INFORCRM-19104	Incorrect source text: "Lead has Clicked out the {{Subject}} Link."
INFORCRM-19123	Update strings with "Sales Insights" to "Sales Insight".
INFORCRM-19124	Update string with "Create By" to "Created By".

Defect	Description
INFORCRM-19158	(ICBOE) On the Back Office detail view, Custom Price Services tab columns do not sort.
INFORCRM-19206	In a localized environment, the Marketo Leads list view contains untranslated strings.
INFORCRM-19215	If a contract is copied, any changes made to the copied record revert to the values of the original contract.
INFORCRM-19224	When viewing the Insert Product dialog, the Product Variant label is not formatted correctly.
INFORCRM-19261	(ICBOE) When editing an Account Entity, the title of the dialog box should be "Edit Back Office Accounting Entity".
INFORCRM-19267	On the Add Custom Product dialog box, the Pricing fields are not tab enabled.
INFORCRM-19276	In Options, on the User Profile tab, changing the Language Selection should automatically update the Regional Format to a matching region.
INFORCRM-19330	The Return detail view date fields in the right column are missing labels.
INFORCRM-19331	On the Return Ship to Details view, the Special Instructions field is too small for data. Selecting the User Date Stamp option fills the entire dialog box is filled making it impossible to view other information entered.
INFORCRM-19423	The Meeting Regarding picklist contains duplicate items.
INFORCRM-19431	The Quote detail view, Add Products lookup does not include packages.
INFORCRM-19435	Users created in the Windows Administrator do not have access to default groups.
INFORCRM-19437	In a localized environment, the Marketo Leads list view contains an untranslated column heading.
INFORCRM-19442	In the Contract detail view, the tooltips for the Save and Delete buttons display "Contract Details" instead of "Save" and "Delete".
INFORCRM-19508	Unable to add products to opportunities when using Internet Explorer 11.
INFORCRM-19551	In the ION workflow integration edit condition form, Unicode Text fields are not being listed in the entity attribute field.
INFORCRM-19558	In the Offline Web Client Tools, Options, General tab, the "Use Active Reporting (requires ActiveX and Crystal Runtime)" check box is no longer needed and should be removed.
INFORCRM-19566	Unable to add users when there are mismatched values between the APPID column of USERINTEGRATIONMAP and the APPID column of the APPIDMAPPING table.
INFORCRM-19610	In the Account Hierarchy dialog box, sorting the Account column on the Opportunity tab throws an exception with the following details in the event log: "message": "could not resolve property: AccountName of: Sage.SalesLogix.Entities.Opportunity.", "source": "NHibernate.Persistor.Entity.AbstractPropertyMapping, NHibernate, Version=3.3.1.4000, culture=neutral, PublicKeyToken=aa95f207798dfdb4", "type": "NHibernate.QueryException".
INFORCRM-19636	The More tabs tab should not be available on the ION Work Flow view.
INFORCRM-19662	On the Opportunity detail view Sales Processes tab the Sales Process drop-down list is empty when loading the form.
INFORCRM-19671	(ICBOE) If a quote contains more than 700 line items, duplicate BODs are created.

Defect	Description
INFORCRM-19692	In a multi-currency environment the What's New Opportunities tab shows currency for the Language selected at sign in, not the opportunity currency.
INFORCRM-19761	In the Entity Manager, the Filters and Metrics tabs labels are missing.
INFORCRM-19800	On the Back Office Integration detail view, Back Offices tab the grid cannot be sorted byVersion.
INFORCRM-19927	In a Visual integrated environment, changing the Account Manager on a contact or account sets the Account Manager to Administrator.
INFORCRM-19937	Update the "Viewing Quote ERP Details Tab" help topic with information for Quote Location.
INFORCRM-19999	In the Check for Duplicates Search Options step, the Type section no longer has a Contacts option.
INFORCRM-20009	In the Quote Detail View, remove the Total and Description fields.
INFORCRM-20084	On the Quote or Sales Order detail view Products tab, Add Custom Product does not add a product.
INFORCRM-20092	On the Quote detail view, clicking the E-mail link causes the error message "No primary email available." to display.
INFORCRM-20101	In the Contacts list view, the contact's Birthdate displays 1 day later than the birthdate in the Contact detail view Details tab.
INFORCRM-20103	The SlxClient portal web.config file is missing the section for setting the Max attachment size.
INFORCRM-20126	In an Oracle environment, selecting the Override the Hosted Help option, adding a new URL and saving the changes causes the error "Infor CRM Error Id: SLXC3E4E5BF8C070888 " to display.
INFORCRM-20133	When editing a product from the Quote detail view Products tab, the Edit Product dialog box display size is too large.
INFORCRM-20142	In the Add or Edit Picklist dialog box, entering special characters in the Name field and then clicking OK or Cancel causes an error to display.
INFORCRM-20177	When exporting to Microsoft Excel, web string is not recognized as a valid DateTime.
INFORCRM-20191	Not-null property references a null or transient value when saving a Ticket.
INFORCRM-20207	On the Defects list view, some filters do not list any items.
INFORCRM-20211	Customer Portal sign in screen shows the wrong copyright year.
INFORCRM-20287	In a Dutch (European-Asian) environment, the Invoices list view Open group, the Status contains untranslated values and the currency columns display decimals incorrectly.
INFORCRM-20288	In a Dutch (European-Asian) environment, the Receivables list view, All Receivables group, the Status contains untranslated values and the currency columns display decimals incorrectly.
INFORCRM-20322	(ICBOE) In an integrated environment, when merging an account created in an ERP with an account created in Infor CRM, an exception error occurs.
INFORCRM-20364	Users allowed "view" permissions to an administrative action should not be able to make any edits.



Defect	Description
INFORCRM-20435	Updating an open opportunity to either Closed-Won or Closed-Lost, increases the Est. Close date by one day and sets the Actual Date to the day before the date the opportunity was closed.
INFORCRM-20456	(ICBOE) Records can be inserted by Back Office extension that allow data with unsafe request form validation characters, causing an Unsafe request pop up message when the record is opened.
INFORCRM-20499	On the Opportunity Sales Process tab the Sales Process and Stages lists do not populate when a sales process is selected in some cases.
INFORCRM-20555	If a lead pushed from Marketo is skipped a SQL exception occurs.
INFORCRM-20591	After updating an account address from the Addresses tab, the Update Matching Contacts Address dialog box may be blank.
INFORCRM-20632	In an Internet Explorer 11 environment, you cannot add products to an opportunity.
INFORCRM-20673	When a group is shared, upon reopening the Share Group dialog box the list is blank.
INFORCRM-20820	On the Quotes Detail view, Products tab, sorting on the Description column causes the list of products to become empty until another column is selected.
INFORCRM-20897	Unable to update the Exchange Rate provider URL in the provider configuration field which is required in order to successfully fetch exchange rates from third party provider fixer.io.
INFORCRM-21046	When performing a Check for Duplicates, the "Finding duplicates please wait" dialog does not update the number of records completed as they are completed.
INFORCRM-21101	Selecting a picklist item to delete, but canceling the deletion when prompted, still deletes the picklist item.
INFORCRM-21131	It may take a long time to display a large list of users.
INFORCRM-21187	After creating a new opportunity, a sales process cannot be selected from the Sales Processes tab until the opportunity has been edited.
INFORCRM-21362	In a Multi-Currency environment, changing an opportunity product Price Level calculates the incorrect Opportunity Adjusted Price.
INFORCRM-21450	Exporting a group with 2 or more of the same column in the layout causes the error "An error occurred requesting job manager. Field is a column or row field. Can't add it to the PageFields collection."
INFORCRM-21679	The Campaign Name and Campaign Description fields should have a field length of 255 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 names containing an asterisk indicate that the same file is available for multiple languages.

File Name	File Contents	File Version
Infor_CRM_v840_Web_Model_Update_03.zip	ICRM v8.4.0 VFS Web Model Update 03.zip	
	ICRM v8.4.0 VFS Web Model Update 03.zip	
	Account.BOEAckStatusNotification. 39ece5be2f3e4ef0a92fc8127c7040cf.relationship.xml	
	AccountContacts.main.quickform.xml	
	AccountContacts.main.quickform.xml.*.resx	
	AccountContacts.main.quickform.xml.resx	
	AccountDistanceSearch.ascx	
	AccountDistanceSearch.ascx.cs	
	AccountDistanceSearch.ascx.resx	
	AccountErpDetails.main.quickform.xml	
	AccountErpDetails.main.quickform.xml.*.resx	
	AccountErpDetails.main.quickform.xml.resx	
	AccountHierarchy.ascx	
	AccountManager.filter.xml	
	AccountMarketoDetails.main.quickform.xml	
	AccountMarketoDetails.main.quickform.xml.resx	
	AccountQuotes.main.quickform.xml	
	AccountQuotes.main.quickform.xml.*.resx	
	AccountQuotes.main.quickform.xml.resx	
	AccountResponses.main.quickform.xml	
	AccountResponses.main.quickform.xml.*.resx	
	AccountResponses.main.quickform.xml.resx	
	Active.filter.xml	
	ActiveIONWorkflows.main.quickform.xml	
	ActiveIONWorkflows.main.quickform.xml.resx	
	ActiveIONWorkflows.smartpart.xml	
	ActiveIONWorkflows.smartpart.xml.resx	
	ActualShipDate.filter.xml	
	AddEditAddress.ascx.cs	
	AddEditBackOfficeAcctEntity.smartpart.xml	
	AddEditBackOfficeAcctEntity.smartpart.xml.*.resx	
	AddEditBackOfficeAcctEntity.smartpart.xml.resx	

File Name	File Contents	File Version
	AddEditBODFieldMapping.main.quickform.xml	
	AddEditBODFieldMapping.main.quickform.xml.*.resx	
	AddEditBODFieldMapping.main.quickform.xml.resx	
	AddEditBOEPAService.main.quickform.xml	
	AddEditBOEPAService.main.quickform.xml.*.resx	
	AddEditBOEPAServiceg.main.quickform.xml.resx	
	AddEditDefectTask.main.quickform.xml	
	AddEditDefectTask.main.quickform.xml.*.resx	
	AddEditDefectTask.main.quickform.xml.resx	
	AddEditOBMCustomSettings.main.quickform.xml	
	AddEditOBMCustomSettings.main.quickform.xml.*.resx	
	AddEditOBMCustomSettings.main.quickform.xml.resx	
	AddEditPickListItem.ascx.cs	
	AddEditTargetResponse.ascx.cs	
	AddEditTask.ascx.cs	
	AddEditTicketActivity.main.quickform.xml	
	AddEditTicketActivity.main.quickform.xml.*.resx	
	AddEditTicketActivity.main.quickform.xml.resx	
	AddressList.ascx.cs	
	Amount.filter.xml	
	AmtRange.filter.xml	
	appSettings.config	
	AssignedTo.filter.xml	
	BackOffice.SlxLocationAccountingEntity. 11db7bc49f2d4eac9b9aa89b37a21ca9.relationship.xml	
	BackOfficeAcctEntity.SlxLocationAccountingEntity. 33b2327c5ca94e2c9b95732923537048.relationship.xml	
	BackOfficeCustomBOEPAService.main.quickform.xml	
	BackOfficeCustomBOEPAService.main.quickform.xml.resx	
	BeginDate.filter.xml	
	BOEAckStatusNotification.BOEAckSTATUSNOTIFICATION. entity.xml	
	BOEPAServiceDetail.main.quickform.xml	
	BOEPAServiceDetail.main.quickform.xml.*.resx	
	BOEPAServiceDetail.main.quickform.xml.resx	
	bundleData.xml	
	CampaignSummary.main.quickform.xml	
	CampaignSummary.main.quickform.xml.*.resx	
	CampaignSummary.main.quickform.xml.resx	
	CampaignTargetCreateGroup.ascx	

File Name	File Contents	File Version
	CampaignTargets.ascx.cs	
	CampaignTargets_ClientScript.js	
	CanChangeMarketoOwner.method.xml	
	CommonTasksTasklet.ascx.cs	
	ContactDetails.main.quickform.xml	
	ContactDetails.main.quickform.xml.*.resx	
	ContactDetails.main.quickform.xml.resx	
	ContactDistanceSearch.ascx	
	ContactDistanceSearch.ascx.cs	
	ContactDistanceSearch.ascx.resx	
	ContactExtendedDetails.main.quickform.xml	
	ContactExtendedDetails.main.quickform.xml.*.resx	
	ContactExtendedDetails.main.quickform.xml.resx	
	ContactSearchForDuplicates.ascx.resx	
	contextForecast.contextmenu.xml	
	contextForecast.contextmenu.xml.resx	
	contextQuota.contextmenu.xml	
	contextQuota.contextmenu.xml.resx	
	ContractDetail.main.quickform.xml	
	ContractDetail.main.quickform.xml.*.resx	
	ContractDetail.main.quickform.xml.resx	
	CopyIONWorkflowMappingRecord.method.xml	
	CopyMultWorkflowMappings.method.xml	
	CopyWorkflowDefinition.method.xml	
	Country.filter.xml	
	CustomSettingDetails.main.quickform.xml	
	CustomSettingDetails.main.quickform.xml.*.resx	
	CustomSettingDetails.main.quickform.xml.	
	DeDupWizard.ascx	
	DeDupWizard.ascx.cs	
	Default-Class-Saleslogix.Class.codetemplate.xml	
	DefaultCSharpCodeBehind.vm	
	Dev.filter.xml	
	EditOpportunityProduct.main.quickform.xml	
	EditOpportunityProduct.main.quickform.xml.*.resx	
	EditOpportunityProduct.main.quickform.xml.resx	
	EditPeriods.main.quickform.xml	
	EditPeriods.main.quickform.xml.resx	
	EditQuoteDetail.main.quickform.xml	
	EditQuoteDetail.main.quickform.xml.*.resx	

File Name	File Contents	File Version
	EditQuoteDetail.main.quickform.xml.resx	
	EditQuoteItem.main.quickform.xml	
	EditQuoteItem.main.quickform.xml.*.resx	
	EditQuoteItem.main.quickform.xml.resx	
	EditSalesOrderDetail.main.quickform.xml	
	EditSalesOrderDetail.main.quickform.xml.*.resx	
	EditSalesOrderDetail.main.quickform.xml.resx	
	EditSalesOrderItem.main.quickform.xml	
	EditSalesOrderItem.main.quickform.xml.*.resx	
	EditSalesOrderItem.main.quickform.xml.resx	
	EditSecurityProfile.main.quickform.xml	
	EditSecurityProfile.main.quickform.xml.*.resx	
	EditSecurityProfile.main.quickform.xml.resx	
	EditSecurityProfile.OkButton_OnClick.method.xml	
	EditSecurityProfile.OnLoad1.method.xml	
	EnableDEXDialog.main.quickform.xml	
	EnableDEXDialog.main.quickform.xml.resx	
	EndDate.filter.xml	
	ErpBillToDetails.main.quickform.xml	
	ErpBillToDetails.main.quickform.xml.*.resx	
	ErpBillToDetails.main.quickform.xml.resx	
	ERPContactAccounts.main.quickform.xml	
	ERPContactAccounts.main.quickform.xml.*.resx	
	ERPContactAccounts.main.quickform.xml.resx	
	ErpContactAssociation.main.quickform.xml	
	ErpContactAssociation.main.quickform.xml.*.resx	
	ErpContactAssociation.main.quickform.xml.resx	
	ErpExtendedDetails.main.quickform.xml	
	ErpExtendedDetails.main.quickform.xml.*.resx	
	ErpExtendedDetails.main.quickform.xml.resx	
	ErpInvoiceExtDetail.main.quickform.xml	
	ErpInvoiceExtDetail.main.quickform.xml.*.resx	
	ErpInvoiceExtDetail.main.quickform.xml.resx	
	ErpPayFromDetails.main.quickform.xml	
	ErpPayFromDetails.main.quickform.xml.*.resx	
	ErpPayFromDetails.main.quickform.xml.resx	
	ERPPerson.ERPPERSON.entity.xml	
	ErpReceivableExtDetails.main.quickform.xml	
	ErpReceivableExtDetails.main.quickform.xml.*.resx	
	ErpReceivableExtDetails.main.quickform.xml.resx	
	ErpReceivableItemDetails.main.quickform.xml	

File Name	File Contents	File Version
	ErpReceivableItemDetails.main.quickform.xml.*.resx	
	ErpReceivableItemDetails.main.quickform.xml.resx	
	ErpReturnDetails.main.quickform.xml	
	ErpReturnDetails.main.quickform.xml.*.resx	
	ErpReturnDetails.main.quickform.xml.resx	
	ErpReturnProductDetails.main.quickform.xml	
	ErpReturnProductDetails.main.quickform.xml.*.resx	
	ErpReturnProductDetails.main.quickform.xml.resx	
	ErpShipmentExtDetail.main.quickform.xml	
	ErpShipmentExtDetail.main.quickform.xml.*.resx	
	ErpShipmentExtDetail.main.quickform.xml.resx	
	ErpShipmentItemDetails.main.quickform.xml	
	ErpShipmentItemDetails.main.quickform.xml.*.resx	
	ErpShipmentItemDetails.main.quickform.xml.resx	
	ErpShipToDetails.main.quickform.xml	
	ErpShipToDetails.main.quickform.xml.*.resx	
	ErpShipToDetails.main.quickform.xml.resx	
	exception.identifiers.config.xml	
	ExportData.aspx	
	ExportData.aspx.cs	
	FinancialSettings.main.quickform.xml	
	FinancialSettings.main.quickform.xml.resx	
	FinancialSettings.smartpart.xml	
	FinancialSettings.smartpart.xml.resx	
	Forecast.page.xml	
	Forecast.page.xml.resx	
	ForecastAudit.main.quickform.xml	
	ForecastAudit.main.quickform.xml.resx	
	ForecastAudit.smartpart.xml	
	ForecastAudit.smartpart.xml.resx	
	ForecastDetails.main.quickform.xml	
	ForecastDetails.main.quickform.xml.resx	
	ForecastDetails.smartpart.xml	
	ForecastDetails.smartpart.xml.resx	
	ForecastOpportunities.main.quickform.xml	
	ForecastOpportunities.main.quickform.xml.resx	
	ForecastOpportunities.smartpart.xml	
	ForecastOpportunities.smartpart.xml.resx	
	ForecastSnapshots.main.quickform.xml	
	ForecastSnapshots.main.quickform.xml.resx	

File Name	File Contents	File Version
	ForecastSnapshots.smartpart.xml	
	ForecastSnapshots.smartpart.xml.resx	
	ForecastSummary.page.xml	
	ForecastSummary.page.xml.resx	
	ForecastWorksheet.main.quickform.xml	
	ForecastWorksheet.main.quickform.xml.resx	
	ForecastWorksheet.smartpart.xml	
	ForecastWorksheet.smartpart.xml.resx	
	GeneralSearchOptionsPage.ascx	
	GeneralSearchOptionsPage.ascx.cs	
	GeoCodeProviderConfiguration.GEOCODEPROVIDERCONFIGURATION. entity.xml	
	GetAccountsByGeocode.mashup.xml	
	GetAccountsByGeocodeMashup.method.xml	
	GetLocationFilterCondition.method.xml	
	GetOpportunityPIFilter.method.xml	
	GetOpportunityStatusMashup.Method.xml	
	GetProductsFilterCondition.method.xml	
	Global.cs	
	Global_Images.resx	
	GrandTotal.filter.xml	
	GroupLayout.resx	
	Groups.main.quickform.xml	
	Groups.main.quickform.xml.*.resx	
	Groups.main.quickform.xml.resx	
	<del>GroupTabOptionsPage.ascx.cs</del>	moved to Core
	Help.master.*.resx	
	Help.master.resx	
	ImportUser.method.xml	
	InsertAssociationActionItem.WebActionRenderingTemplate.vm	
	InsertBackOffice.main.quickform.xml	
	InsertBackOffice.main.quickform.xml.resx	
	InsertBODMapping.main.quickform.xml	
	InsertBODMapping.main.quickform.xml.*.resx	
	InsertBODMapping.main.quickform.xml.resx	
	InsertContract.main.quickform.xml	
	InsertContract.main.quickform.xml.*.resx	
	InsertContract.main.quickform.xml.resx	
	InsertCustomSetting.main.quickform.xml	
	InsertCustomSetting.main.quickform.xml.*.resx	

File Name	File Contents	File Version
	InsertCustomSetting.main.quickform.xml.resx	
	InsertForecast.main.quickform.xml	
	InsertForecast.main.quickform.xml.resx	
	InsertForecast.page.xml	
	InsertForecast.page.xml.resx	
	InsertForecast.smartpart.xml	
	InsertForecast.smartpart.xml.resx	
	InsertIONWorkflowDefinition.main.quickform.xml	
	InsertIONWorkflowDefinition.main.quickform.xml.resx	
	InsertIONWorkflowMapping.main.quickform.xml	
	InsertIONWorkflowMapping.main.quickform.xml.resx	
	InsertOpportunity.main.quickform.xml	
	InsertOpportunity.main.quickform.xml.*.resx	
	InsertOpportunity.main.quickform.xml.resx	
	InsertQuota.main.quickform.xml	
	InsertQuota.main.quickform.xml.resx	
	InsertQuota.page.xml	
	InsertQuota.page.xml.resx	
	InsertQuota.smartpart.xml	
	InsertQuota.smartpart.xml.resx	
	InsertQuote.btnAddNewAccount_OnClick.method.xml	
	InsertQuote.main.quickform.xml	
	InsertQuote.main.quickform.xml.*.resx	
	InsertQuote.main.quickform.xml.resx	
	InsertQuote.OnLoad1.method.xml	
	InsertSalesOrder.btnAddNewAccount_OnClick.method.xml	
	InsertSalesOrder.main.quickform.xml	
	InsertSalesOrder.main.quickform.xml.*.resx	
	InsertSalesOrder.main.quickform.xml.resx	
	InsertSalesOrder.OnLoad1.method.xml	
	IntegrationBackOffices.main.quickform.xml	
	IntegrationBackOffices.main.quickform.xml.*.resx	
	IntegrationBackOffices.main.quickform.xml.resx	
	IntegrationContourAbout.main.quickform.xml	
	IntegrationContourAbout.main.quickform.xml.resx	
	IntegrationContourAbout.smartpart.xml	
	IntegrationContourAbout.smartpart.xml.resx	
	IntegrationDetail.btnSave_OnClickAction.method.xml	
	IntegrationDetail.main.quickform.xml	
	IntegrationDetail.main.quickform.xml.*.resx	



File Name	File Contents	File Version
	IntegrationDetail.main.quickform.xml.resx	
	IntegrationGeocode.main.quickform.xml	
	IntegrationGeocode.main.quickform.xml.*.resx	
	IntegrationGeocode.main.quickform.xml.resx	
	IntegrationIONWorkFlows.main.quickform.xml	
	IntegrationIONWorkFlows.main.quickform.xml.resx	
	Integration.MarkettoPartition. e4c7ef5cda674518928288a0a57f5829.relationship.xml	
	IntegrationUsers.main.quickform.xml	
	IntegrationUsers.main.quickform.xml.*.resx	
	IntegrationUsers.main.quickform.xml.resx	
	InvoiceItemDetail.main.quickform.xml	
	InvoiceItemDetail.main.quickform.xml.*.resx	
	InvoiceItemDetail.main.quickform.xml.resx	
	<del>IONWorkflowDefinition.</del> <del>IONWORKFLOWDEFINITION.entity.xml</del>	moved to Core
	IONWorkflowDefinition.page.xml	
	IONWorkflowDefinition.page.xml.resx	
	IONWorkflowDefinitionCopy.main.quickform.xml	
	IONWorkflowDefinitionCopy.main.quickform.xml.resx	
	IONWorkflowDefinitionCopy.smartpart.xml	
	IONWorkflowDefinitionCopy.smartpart.xml.resx	
	IONWorkFlowDetails.main.quickform.xml	
	IONWorkFlowDetails.main.quickform.xml.resx	
	IONWorkflowFieldMappings.main.quickform.xml	
	IONWorkflowFieldMappings.main.quickform.xml.resx	
	IONWorkflowMapping.IONWORKFLOWMAPPING.entity.xml	
	IONWorkflowMappingCopy.main.quickform.xml	
	IONWorkflowMappingCopy.main.quickform.xml.resx	
	IONWorkflowMappingCopy.smartpart.xml	
	IONWorkflowMappingCopy.smartpart.xml.resx	
	IONWorkflowMappingDetails.main.quickform.xml	
	IONWorkflowMappingDetails.main.quickform.xml.resx	
	LeadDetails.main.quickform.xml	
	LeadDetails.main.quickform.xml.*.resx	
	LeadDetails.main.quickform.xml.resx	
	LitRequestForm.ascx	
	LiveGroupViewer.smartpart.xml	
	LiveGroupViewer.smartpart.xml.resx	
	log4net.config	

File Name	File Contents	File Version
	Login.aspx	
	Login.aspx.resx	
	Login.aspx.*.resx	
	Logoff.aspx	
	Logoff.aspx.resx	
	Logoff.aspx.*.resx	
	ManageCurrency.main.quickform.xml	
	ManageCurrency.main.quickform.xml.*.resx	
	ManageCurrency.main.quickform.xml.resx	
	Manager.filter.xml	
	ManageStages.ascx.cs	
	ManageTargets.ascx.resx	
	manifest.xml	
	MarketoInsightDashboard.smartpart.xml	
	MarketoInsightDashboard.smartpart.xml.resx	
	MarketoLeadDetail.main.quickform.xml	
	MarketoLeadDetail.main.quickform.xml.resx	
	MarketoPartition.MarketoLead. 847e07c7c7d6421582564fc0794edb18.relationship.xml	
	MarketoPartition.MARKETOPARTITION.entity.xml	
	MarketoPartition.page.xml	
	MarketoPartition.page.xml.resx	
	MarketoPartitionDetail.main.quickform.xml	
	MarketoPartitionDetail.main.quickform.xml.resx	
	MarketoPartitionDetail.smartpart.xml	
	MarketoPartitionDetail.smartpart.xml.resx	
	MarketoPartitions.main.quickform.xml	
	MarketoPartitions.main.quickform.xml.resx	
	MarketoPartitions.smartpart.xml	
	MarketoPartitions.smartpart.xml.resx	
	MarketoSalesInsights.smartpart.xml	
	MarketoSalesInsights.smartpart.xml.resx	
	menuItemCreateNewForecastGroup.contextmenu.xml	
	menuItemCreateNewForecastGroup.contextmenu.xml.resx	
	menuItemCreateNewQuotaGroup.contextmenu.xml	
	menuItemCreateNewQuotaGroup.contextmenu.xml.resx	
	menuItemLookupForecast.contextmenu.xml	
	menuItemLookupForecast.contextmenu.xml.resx	
	menuItemLookupQuota.contextmenu.xml	

File Name	File Contents	File Version
	menuItemLookupQuota.contextmenu.xml.resx	
	menuItemNewForecast.contextmenu.xml	
	menuItemNewForecast.contextmenu.xml.resx	
	menuItemNewQuota.contextmenu.xml	
	menuItemNewQuota.contextmenu.xml.resx	
	MergeChildren.ascx	
	MergeChildren.ascx.resx	
	MergeRecords.ascx.cs	
	MergeRecords.ascx.resx	
	MergeRecordsConfirmation.ascx	
	MergeRecordsConfirmation.ascx.cs	
	MergeRecordsConfirmation.ascx.resx	
	MergeRecordsConfirmation.smartpart.xml	
	MergeRecordsConfirmation.smartpart.xml.resx	
	MergeRecordsConfirmation_Edit.ascx	
	MergeRecordsConfirmation_Edit.ascx.cs	
	navForecastDetails.navitem.xml	
	navForecastDetails.navitem.xml.resx	
	navForecastSummary.navitem.xml	
	navForecastSummary.navitem.xml.resx	
	navQuota.navitem.xml	
	navQuota.navitem.xml.resx	
	new_Forecase.menu.xml	
	new_Forecase.menu.xml.resx	
	new_Quota.menu.xml	
	new_Quota.menu.xml.resx	
	new_quote.menu.xml	
	new_quote.menu.xml.*.resx	
	new_quote.menu.xml.resx	
	new_salesOrder.menu.xml	
	new_salesOrder.menu.xml.*.resx	
	new_salesOrder.menu.xml.resx	
	new_ticket.menu.xml	
	new_ticket.menu.xml.*.resx	
	new_ticket.menu.xml.resx	
	OfficeProfile.page.xml	
	OfficeProfile.page.xml.*.resx	
	OfficeProfile.page.xml.resx	
	OfficeProfileSettings.main.quickform.xml	
	OfficeProfileSettings.main.quickform.xml.resx	
	OfficeProfileSettings.smartpart.xml	

File Name	File Contents	File Version
	OfficeProfileSettings.smartpart.xml.resx	
	<del>OnAfterInsert.method.xml</del>	moved to Core
	<del>OnAfterUpdate.method.xml</del>	moved to Core
	<del>OnBeforeInsert.method.xml</del>	moved to Core
	<del>OnBeforeUpdate.method.xml</del>	moved to Core
	OpportunitiesOptionsPage.ascx	
	OpportunitiesOptionsPage.ascx.resx	
	OpportunitiesWhatsNew.ascx	
	OpportunitiesWhatsNew.ascx.cs	
	OpportunitiesWhatsNew.ascx.resx	
	Opportunity.SlxLocation. 2e7a7786b8154bbab325e58ca67c79e8.relationship.xml	
	OpportunityClosedLost.cmdCancel_OnClick.method.xml	
	OpportunityClosedLost.lueCompetitorLoss_OnChange.method.xml	
	OpportunityClosedLost.main.quickform.xml	
	OpportunityClosedLost.main.quickform.xml.*.resx	
	OpportunityClosedLost.main.quickform.xml.resx	
	OpportunityClosedWon.cmdCancel_OnClick.method.xml	
	OpportunityClosedWon.lueCompetitorReplaced_OnChange.method.xml	
	OpportunityClosedWon.main.quickform.xml	
	OpportunityClosedWon.main.quickform.xml.*.resx	
	OpportunityClosedWon.main.quickform.xml.resx	
	OpportunityDetails.cmdCopyOpportunity_OnClick.method.xml	
	OpportunityDetails.main.quickform.xml	
	OpportunityDetails.main.quickform.xml.*.resx	
	OpportunityDetails.main.quickform.xml.resx	
	OpportunityDetails.OnLoad1.method.xml	
	OpportunityErpDetails.main.quickform.xml	
	OpportunityErpDetails.main.quickform.xml.*.resx	
	OpportunityErpDetails.main.quickform.xml.resx	
	OpportunityProducts.main.quickform.xml	
	OpportunityProducts.main.quickform.xml.*.resx	
	OpportunityProducts.main.quickform.xml.resx	
	OpportunitySalesProcess.ascx.cs	
	OpportunitySnapShot.ascx.cs	
	OpportunityStatus.mashup.xml	
	PeriodExchangeRate.main.quickform.xml	

File Name	File Contents	File Version
	PeriodExchangeRate.main.quickform.xml.resx	
	PickListDetail.ascx.cs	
	PickListItems.ascx.cs	
	Potential.filter.xml	
	Product.ProductLocation. 03b0eaa680fb476cac0c90b4b298b997.relationship.xml	
	ProductDetails.main.quickform.xml	
	ProductDetails.main.quickform.xml.*.resx	
	ProductDetails.main.quickform.xml.resx	
	Product.filter.xml	
	<del>ProductLocation.PRODUCTLOCATION.entity.xml</del>	moved to Core
	<del>ProductLocationView.PRODUCTLOCATIONVIEW.entity.xml</del>	moved to Core
	<del>ProductMasterDataEnabledView. PRODUCTMASTERDATAENABLEDVIEW.entity.xml</del>	moved to Core
	QFListBox.WebControlRenderingTemplate.vm	
	QFSDataGrid.WebControlScriptRenderingTemplate.vm	
	QuickForm2Web.vm	
	Quota.page.xml	
	Quota.page.xml.resx	
	QuotaDetails.main.quickform.xml	
	QuotaDetails.main.quickform.xml.resx	
	QuotaDetails.smartpart.xml	
	QuotaDetails.smartpart.xml.resx	
	QuoteDetails.btnCopy_OnClick.method.xml	
	QuoteDetails.main.quickform.xml	
	QuoteDetails.main.quickform.xml.*.resx	
	QuoteDetails.main.quickform.xml.resx	
	QuoteDetails.OnLoad1.method.xml	
	QuoteDiscountChargeItems.main.quickform.xml	
	QuoteDiscountChargeItems.main.quickform.xml.*.resx	
	QuoteDiscountChargeItems.main.quickform.xml.resx	
	QuoteErpDetails.main.quickform.xml	
	QuoteErpDetails.main.quickform.xml.*.resx	
	QuoteErpDetails.main.quickform.xml.resx	
	QuoteProducts.main.quickform.xml	
	QuoteProducts.main.quickform.xml.*.resx	
	QuoteProducts.main.quickform.xml.resx	
	QuoteSnapshot.ascx	
	QuoteSnapshot.ascx.resx	

File Name	File Contents	File Version
	QuoteySnapShot.ascx.cs	
	Region.filter.xml	
	ReturnDetails.main.quickform.xml	
	ReturnDetails.main.quickform.xml.*.resx	
	ReturnDetails.main.quickform.xml.resx	
	ReturnShipToDetail.main.quickform.xml	
	ReturnShipToDetail.main.quickform.xml.*.resx	
	ReturnShipToDetail.main.quickform.xml.resx	
	RoleActions.main.quickform.xml	
	RoleActions.main.quickform.xml.*.resx	
	RoleActions.main.quickform.xml.resx	
	RoleUsers.main.quickform.xml	
	RoleUsers.main.quickform.xml.*.resx	
	RoleUsers.main.quickform.xml.resx	
	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule.module.xml	
	Sage.SnippetLibrary.CSharp. @.03ece52b-ed84-472f-acc0-1c9e6f421871.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.5c9de628-c88e-4893-8c52-1a877f68a1e6.codesnippet.cs	
	Sage.SnippetLibrary.CSharp .@.5f1a7339-5d40-4671-9522-9fe3f4b49035.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.5fc66ecc-305b-4b51-b311-59fa7479c5e0.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.6ca31f10-e98e-4c8c-9b1e-1a9e02633d36.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.6d52933f-707d-4eaa-a9d4-5c59c45f4269.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.50a29bf4-0a49-4cf6-9848-1b93209c6040.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.91d7fa9c-fade-446e-829f-2cfc4b570e1c.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.173a8858-50e7-45c6-a602-4dadf7f22c6a.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.34fc6dc2-19c4-4016-b79a-c4bf2fe5435c.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.629d230d-5e07-425f-b494-cf424afbd6fa.codesnippet.cs	

File Name	File Contents	File Version
	Sage.SnippetLibrary.CSharp. @.09444607-7a4a-40a4-bcd3-5cb0d451963f.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.34760844-1ddf-461e-9623-8baf384a22ff.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.a208a60c-1b62-4026-9b4e-8cdb57973919.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.c76519e8-cd6b-4eb8-815f-4d4a30b015c1.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.d44aa26d-ea57-49a7-a1c5-fc400d1ab404.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.d91d83f3-efe1-45c0-913c-d94ecbceef36.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.db980b6a-4754-4b0f-8a52-7716d51410a4.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.ea481e10-b8ec-4571-8994-3b1c6e764970.codesnippet.cs	
	Sage.SnippetLibrary.CSharp. @.eefa20d0-1d90-45e9-a21b-33ddfa847d5f.codesnippet.cs	
	SalesLogix.resx	
	SalesLogix.*.resx	
	SalesLogixPortal.resx	
	SalesLogixPortal.*.resx	
	SalesOrderDetails.btnCopy_OnClick.method.xml	
	SalesOrderDetails.main.quickform.xml	
	SalesOrderDetails.main.quickform.xml.*.resx	
	SalesOrderDetails.main.quickform.xml.resx	
	SalesOrderDetails.OnLoad1.method.xml	
	SalesOrderDiscountChargeItems.main.quickform.xml	
	SalesOrderDiscountChargeItems.main.quickform.xml.*.	
	SalesOrderDiscountChargeItems.main.quickform.xml.resx	
	SalesOrderDistributedTaxes.main.quickform.xml	
	SalesOrderDistributedTaxes.main.quickform.xml.*.resx	
	SalesOrderDistributedTaxes.main.quickform.xml.resx	
	SalesOrderErpDetails.main.quickform.xml	
	SalesOrderErpDetails.main.quickform.xml.*.resx	
	SalesOrderErpDetails.main.quickform.xml.resx	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.*.resx	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	

File Name	File Contents	File Version
	SalesOrderSnapShot.ascx	
	SalesOrderSnapShot.ascx.cs	
	SalesOrderSnapShot.ascx.resx	
	SalesOrderSoldTo.main.quickform.xml	
	SalesOrderSoldTo.main.quickform.xml.*.resx	
	SalesOrderSoldTo.main.quickform.xml.resx	
	ScriptDeferFilter.cs	
	SecuredActionRoles.main.quickform.xml	
	SecuredActionRoles.main.quickform.xml.*.resx	
	SecuredActionRoles.main.quickform.xml.resx	
	SendTicketEmail.ascx	
	SendTicketEmail.ascx.cs	
	SetMingleContext.aspx.cs	
	Shared.filter.xml	
	SixLocation.ProductLocation. d5452e90a06e48a2b694768759060eec. relationship.xml	
	SixLocation.SixLocationAccountingEntity. 9d5e6fc71abf42afb2dc12a681972567.relationship.xml	
	SixPage.pgtemplate.xml.resx	
	SpeedSearch.ascx	
	SpeedSearch.resx	
	State.filter.xml	
	StepManageDuplicates.ascx.cs	
	StepProcessRequest.ascx	
	StepProcessRequest.ascx.cs	
	StepSelectFile.ascx	
	SumWeightedPotential.filter.xml	
	SyncHistory.main.quickform.xml	
	SyncHistory.main.quickform.xml.*.resx	
	SyncHistory.main.quickform.xml.resx	
	SyncResultsHistory.ascx	
	tenant.config	
	TicketActivities.main.quickform.xml	
	TicketActivities.main.quickform.xml.*.resx	
	TicketActivities.main.quickform.xml.resx	
	TicketActivityItems.main.quickform.xml	
	TicketActivityItems.main.quickform.xml.*.resx	
	TicketActivityItems.main.quickform.xml.resx	



File Name	File Contents	File Version
	TicketProblem.Ticket.TICKETPROBLEM.entity.xml	
	TicketSolution.Ticket.TICKETSOLUTION.entity.xml	
	TotalAmount.filter.xml	
	UpdateAccountOptions.ascx.cs	
	UpdateTargets.ascx	
	UpdateTargets.ascx.cs	
	User.BOEAckStatusNotification. 33dfed93b7fb4247a87d96ae35b6846b.relationship.xml	
	UserChangePassword.btnSave_OnClick.method.xml	
	UserChangePassword.main.quickform.xml	
	UserChangePassword.main.quickform.xml.*.resx	
	UserChangePassword.main.quickform.xml.resx	
	UserChangePassword.OnLoad1.method.xml	
	UserProfileOptionsPage.ascx	
	UserProfileOptionsPage.ascx.cs	
	UserProfileOptionsPage.ascx.resx	
	UserRole.USERROLE.entity.xml	
	web.config	
	WinAuthLoad.aspx.cs	



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# Chapter 2

## Applying the Update

# 2

This Web Model Update affects the following portals:

- SData
- Web Client
- Offline Web Client
- Customer Portal
- SDataCustomerPortal
- SLXJobService



Install the ICRM v8.4.0 VFS Web Model Update 03.zip bundle using the Application Architect, and then build and deploy your Web site(s).

## Installing VFS bundles

Install VFS .zip bundles using the Application Architect.



If you are using a local file system, instead of a virtual file system (VFS), you must stop the SLXJobService. You may restart the SLXJobService after building and deploying your web site.

### To install the bundles

1. Extract the contents of the **Infor\_CRM\_v840\_Web\_Model\_Update\_03.zip** file to a temporary folder.
2. Ensure the bundle is not blocked.
  - a. Right-click the bundle file and click **Properties**.
  - b. On the **General** tab, if there is an **Unblock** button, click it to unblock the file. The Unblock button only displays if the file is locked.
  - c. Click **Apply**.
  - d. Click **OK**.
3. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
4. Open the **Application Architect**.
5. Select **Filename** and navigate to the temporary folder you extracted the **Infor\_CRM\_v840\_Web\_Model\_Update\_03.zip**, click **ICRM v8.4.0 VFS Web Model Update 03.zip**, and then click **Open**.

6. On the **Select Bundle** screen, click **Next**.



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

7. On the **Select Items** screen, ensure the **Portals** option is selected.
8. Click **Next**, and then click **Finish**.
9. Close Application Architect.
10. Re-open Application Architect.

## Merging Configuration files

If you have customized configuration files, you must merge your configuration files with the updated configuration files in this update.

### To merge

1. In Application Architect, open the **Virtual File System Explorer**.
2. Expand **Virtual File System Explorer**, expand **Model**, and then expand **Portal**.
3. Merge the SixClient portal web.config files.
  - a. Expand the **SixClient** portal.
  - b. Expand the **Support Files** folder, right-click the **web.config** file, and then click **Open**.
  - c. Open Windows Explorer and browse to the base directory on the Web server, for example, C:\inetpub\wwwroot\, and then double-click the **SixClient** folder.
  - d. Open the **web.config** file.
  - e. Use a comparison tool to merge the contents of both files into the Virtual File System (VFS) version of the web.config file.
  - f. Save your changes.
4. Repeat step 3 for the SixClient **appSettings.config** file.
5. Merge the SData portal web.config files.
  - a. Browse to the **SData** portal.  
This is the SData portal you configured when implementing Infor Ming.le.
  - b. Expand the **Support Files** folder, right-click the **web.config** file, and then click **Open**.
  - c. Open Windows Explorer and browse to the base directory on the Web server, for example, C:\inetpub\wwwroot\, and then double-click the **SData** folder.
  - d. Open the **web.config** file.
  - e. Use a comparison tool to merge the contents of both files into the Virtual File System (VFS) version of the web.config file.
  - f. Save your changes.
6. Repeat step 5 for the SData **appSettings.config** file.



When building and deploying, you may see the error "Exception was thrown when getting deployment items: Key already exists." You can safely ignore this error.

## Building and deploying the Web changes

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



You must log in to the Application Architect and build and deploy the Web changes from within the Application Architect in order to get all changes.

### To build and deploy

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



- By default, the Infor CRM Web Client portal is set to deploy to the localhost, but you can change these settings to fit your environment.
  - Changes will not be visible to the Web Client and/or Web remote Office until after the next Sync cycle.
8. Repeat steps 1-7 for each of the affected portals.

## Infor CRM Back Office Extension (ICBOE) installations

If your installation includes Infor CRM Back Office Extension, you must upgrade the BOD Pack for your ERP system to version 8.4.0.03. For more information, and to download the BOD Packs, see KB 2118172, available from Infor Concierge at <https://conciierge.infor.com/>.

### To access the Knowledge Base

1. From the **App Menu**, click **Infor Support Portal**.
2. Click **Search** and then click **Knowledge Base**.

## Infor CRM ION Workflow

If your installation includes Infor CRM ION Workflow, you must upload additional files to ION Desk and Infor Ming.le. For more information, and to download the files, see KB 1974772, available from Infor Xtreme [www.inforxtreme.com](http://www.inforxtreme.com).

