



Upgrading to Infor CRM v8.2 Guide

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Chapter 1

Upgrade Workplan



This document provides instructions for upgrading existing installations from version 8.0 or 8.1 to version 8.2. Version 8.2 will uninstall earlier versions of Infor CRM before installing version 8.2.

- If you are upgrading from Saleslogix version 8.0 or later, follow the steps in this guide.
- If you have never installed a version of Saleslogix or Infor CRM, do not use this guide. Refer to the instructions in the *Infor CRM Implementation Guide* document provided with this release.
- If you are upgrading from a version prior to version 8.0, you must first upgrade to version 8.0 or later before upgrading to version 8.2. Use the upgrade instructions in the appropriate upgrade documents on the support portal web site: Infor.com/inforxtreme.



- DO NOT install this release on any Infor version earlier than 8.0.
- Intellisync for SalesLogix is not supported in Saleslogix v8.1 or Infor CRM v8.2

What's New in this Release

The key new features added in version 8.2 are:

- Saleslogix is now Infor CRM. Look for the new branding with Infor CRM replacing Saleslogix throughout the Clients and in many areas of the rest of the product. Some installed components and registries have retained the name Saleslogix.
- New colors and layout in the Web and Mobile Clients
- New self-service feature added to the Web Client and Customer Portal Sign On screens allows users to reset their own passwords and request their usernames
- New Language Selector drop-down on the Sign On page enables the user to override the default browser language
- New Import feature
- New groups and filters features
- New Charting and usability features in the Mobile Client.
- New functionality added to Project Bundles
- Users assigned the Web Admin role now have visibility into such group usage as number of groups in the system, who owns each group, and with whom they are shared.
- Users assigned the Web Admin role can create new filters and new metrics through the Web Client. This feature was previously only available in the Application Architect
- New Sign-in/Sign-off Usage Log for Portal Users and Users logs when users or portal users sign on, sign off or make failed sign on attempts. Each log is captured in a user audit table and contact audit table
- New scripting enables customized installations.

For more information about what's new in this release, see [Chapter 2, "Changes in this Release"](#).

Prerequisites

The following table shows software prerequisites that will automatically be installed on your computer if they are not already installed. Installing these prerequisites may require your computer to restart. For additional prerequisites, see the Compatibility Guide, available on the support portal web site: Infor.com/inforxtreme.



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

Prerequisites	Admin Tools and Servers	LAN Client	Remote Office	Remote Client	Offline Web Client	Web Host
Windows Installer 3.1		X				X
Windows Installer 4.5.1	X		X	X	X	
Microsoft Exception Message Box	X		X	X		
Microsoft .NET Framework 4.5.1	X		X	X	X	X
Microsoft .NET Framework Multi-Targeting Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server Express 2012 RTM (Optional) ²	X		X	X	X	
PowerShell 1.0 for Windows Server 2003 (x86)	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X



- ¹ Microsoft .NET Framework v4.5.1 is installed in Integrated model.
- ² If a version of the Microsoft SQL Server database is already installed, the Microsoft SQL Express, installation will not complete successfully. Decline the option to install if it is offered.

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

- **All** - all Infor CRM installations.
- **Web** - installations that include Web components.
- **Mobile** - installations that include the Mobile client.
- **Network** - installations that include Network components.
- **Remotes** - installations that include Remote users or Remote Offices.
- **Customized** - installations that have customized their Infor CRM environment.
- **Oracle** - installations running Infor CRM on an Oracle database.
- **Microsoft SQL Server** - installations running Infor CRM on a Microsoft SQL Server database.
- **Outlook Sync** - Installations that include Outlook Sync.

Required for	Task Description
Prepare to Upgrade	
<p>All</p>	<p>1 Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.</p> <ul style="list-style-type: none"> • Chapter 1, “Upgrade ‘Workplan” - contains upgrade tasks explaining how to: <ul style="list-style-type: none"> • Save your existing customizations. • Upgrade all Infor CRM components. • Reapply customizations to your upgraded installation. • Send changes to all users by releasing plugins, synchronizing changes, and/or deploying portals. • Integrate any new features into your environment. • Chapter 2, “Changes in this Release” - details the new features, functionality changes, and enhancements in this release. Any change that impacts customizations is identified as a [Breaking Change]. • Chapter 3, “Plugin Changes in this Release” - details the schema and plugin changes in this release. <p>Before upgrading, ensure that:</p> <ul style="list-style-type: none"> • Web portals included in your installation are version 8.0 or later and have deployed successfully. • Your current Infor CRM version is 8.0 or later. • You review the <i>Compatibility Guide</i> to understand the supported platforms, applications, and system requirements for this release. <p>The <i>Compatibility Guide</i> is available on the support portal web site: Infor.com/inforxtreme.</p>
<p>This task is required if you are installing Outlook Sync</p> <p>This task is required if you are upgrading from version 8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>2 Review requirements for installing Outlook Sync.</p> <p>If you will be implementing Outlook Sync ensure you understand the following installation requirements:</p> <ul style="list-style-type: none"> • Your implementation must have access to the Web Admin features, to enable the Outlook Sync integration. • An SData portal must be deployed. <p>If your installation is:</p> <ul style="list-style-type: none"> • Windows Network Client only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals. • Remote Office and Offline Web Clients: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment. • Windows Remote Client: no extra actions required. The SData portal is deployed as part of the LAN Remote Client install. <p>After installing Outlook Sync, notify your Web Client and Windows Client users that they must configure Outlook Sync on their machines using the Infor CRM Outlook Connector.</p>

Required for	Task Description
All	<p>3 Install this release in a test environment before installing on your production database.</p> <p>Create a test environment to review new features and for use after upgrading your production environment. If your installation includes customizations, you can use the test environment to compare your customizations with your upgraded production environment.</p> <p>Refer to the support portal web site: Infor.com/inforxtreme for more information. Search for “How to set up a SalesLogix test environment” for information on using a copy of your production database in a test environment.</p> <p>Note Make sure you change your logging paths in the Administrator to access the test environment or errors will occur.</p>
All	<p>4 Grant admin rights to the person installing the upgrade.</p> <p>Offline (disconnected) Web Client users can upgrade without admin rights on their machines. Other users require admin rights when installing Infor CRM.</p>
All	<p>5 Run the Infor CRM Component Finder utility.</p> <p>The Infor CRM Component Finder utility compiles a list of the Infor CRM products installed on the machine.</p> <p>To run utility:</p> <ol style="list-style-type: none"> 1 In the Upgrades > FindProducts folder, double-click the FindInforCRMProducts.exe. 2 In the Infor CRM Component Finder window, click the Find Infor CRM Products button.
Web	<p>6 Open Windows Firewall and add an exclusion for port 11211.</p> <p>The Cache Server requires access to this port. The Cache Server is used to speed processing of the Web Client by providing storage for cached information.</p> <p>The Cache Server can be installed on any server, however, avoid installing it on a high-activity machine such as the SpeedSearch Server. Do not have multiple instances of the Cache Server installed in your environment.</p>
Protect Your Customizations	
Customized Network	<p>7 Record your Network Client customizations and use the Architect to create a bundle of all customized plugins in your database. See the “Working with Bundles” topic in the Architect Help for instructions.</p> <p>Note Infor CRM does not overwrite your customized plugins. However, this bundle can be used as a backup of your customizations.</p> <p>Note Converting fields to Unicode is considered a customization for upgrade purposes because it is a change to the entity model; upgrades after you convert to Unicode may require that you bundle the Unicode model and merge it.</p>
Customized Network	<p>8 Review the Infor CRM plugin changes to determine if you have customized any plugins that are updated in this release.</p> <p>Review Chapter 3, “Plugin Changes in this Release” for all plugin changes. After reviewing plugin changes, determine if you are going to add your customizations to the plugins in this release (recommended) or add the Infor CRM changes to your custom plugins.</p>
Customized Network and Customized Web	<p>9 Back up all custom assemblies to protect any changes. Custom assemblies may be overwritten or deleted during the installation.</p>

Required for	Task Description
Customized Web	<p>10 Document or save any customizations made in the web.config files.</p> <p>Before you upgrade, use the Application Architect to note customizations in all web.config files. Use the steps in task number 58 to apply the changes after the upgrade.</p>
Customized Web	<p>11 Document any customizations made to Dashboards.</p> <p>Important Any custom Dashboards will need to be recreated after the upgrade. You will recreate the custom Dashboards in task number 57.</p>
This task is required if you are upgrading Infor CRM Mobile.	<p>12 Save any customization made to Infor CRM Mobile.</p> <p>Before deleting the existing Mobile portal, you must save any changes you have made directly in the portal SupportFiles to a bundle or onto your local file system.</p> <p>This includes changes to out-of-the-box views or classes, any views or JavaScript files you have added, or any changes to configuration or content. Failure to save these changes will cause them to be lost when you delete the portal.</p>
<p>This task is required if you are upgrading from v8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>13 Delete the MergeConfiguration.xml file.</p> <p>Note If you customized this file, record your customizations before deleting them.</p> <p>New configurations have been added to the MergeConfiguration file. You must delete and recreate the file to see the updates. The file is rebuilt when you convert a lead in the Web Client. After you recreate the file, you can add your customizations.</p> <p>To delete</p> <ol style="list-style-type: none"> 1 In the Application Architect, open the Virtual File System Explorer. 2 In the tree view expand Configuration and expand Global. 3 If necessary, save the MergeConfiguration.xml file to another location or record any customizations to the files. 4 Delete the file.
<p>This task is required if you are upgrading from v8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>14 Delete the DeDupConfigurations.xml file.</p> <p>Note If you customized this file, record your customizations before deleting them.</p> <p>New configurations have been added to the DeDupConfigurations.xml file. You must delete the file to see the updates. The file is rebuilt automatically as part of the upgrade. After the file is recreated, you can add your customizations.</p> <p>To delete</p> <ol style="list-style-type: none"> 1 In the Application Architect, open the Virtual File System Explorer. 2 In the tree view expand Configuration and expand Global. 3 If necessary, save the DeDupConfigurations.xml file to another location or record any customizations to the files. 4 Delete the file.

Required for	Task Description
Customized Web Without Hot Fixes or Accelerators	<p>15 Prepare to create a bundle of your Web customizations.</p> <p>Note If you have not customized your Web implementation, disregard this task and proceed to task number 17. If you customized your Web implementation and have Updates and/or Accelerators installed, proceed to task number 16.</p> <p>Infor CRM provides project backups that you can use to compare to your current database. A bundle is created from the differences.</p> <p>To prepare</p> <ol style="list-style-type: none"> 1 Locate the appropriate project backup file: <ul style="list-style-type: none"> • Saleslogix v8.0 Project.Backup.zip - if you are upgrading from v8.0 non-Unicode • Saleslogix v8.0 Unicode Project.Backup - if you are upgrading from v8.0 Unicode • Saleslogix v8.1 Project_Backup.zip - if you are upgrading from v8.1 non-Unicode. • Saleslogix v8.1 Unicode Project.Backup - if you are upgrading from v8.1 Unicode. <p>The project backup files are included in the service pack download files.</p> 2 Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 3 In the Application Architect Project Explorer, open your current project. 4 If necessary, open the Output Window to display progress when creating your customization bundle. <p>Note In the Project Explorer tree view do not expand nodes unnecessarily. Some nodes, such as the Portal Page Templates node, will autcreate items that may be included in your customization bundle.</p> 5 Proceed to task number 17.

Required for	Task Description
Customized Web with Hot Fixes and/or Accelerators	<p>16 Identify customized forms on your system and create a bundle of your Web customizations. Create a new project workspace and add the Updates and/or Accelerators (including the Mobile 2011R1 Accelerator) currently installed on your system.</p> <p>Note If you have not customized your Web implementation or have an accurate record of your customizations, disregard this task and proceed to task number 17. If you customized your Web implementation, but do not have any hot fixes or Accelerators installed, go back to task number 15.</p> <p>To determine if an Update or Accelerator has been installed, view your system bundles:</p> <ul style="list-style-type: none"> • For network bundles, open the Administrator, and then click Bundles. • For Web bundles, open the Application Architect, open Project Explorer, expand the VFS project workspace, and then expand Bundle Model. <p>After creating a new project workspace, restore the project backup into the workspace, and apply your hot fixes and Accelerators.</p> <p>To create</p> <ol style="list-style-type: none"> 1 Create a new project workspace. <ol style="list-style-type: none"> a On the Application Architect View menu, click Project Workspace Manager. b Right-click in the Project Workspaces window, and then click Add. c In the Name box, type a name for the project workspace. d In the Working Path box, type or browse to the location where you want to save the new project workspace. The Source Path is automatically set to the working source location. e In the Description box, type a description or additional information about the new project. f Ensure the Export Files Upon Creation check box is not selected. g Click Create. 2 Restore the appropriate project backup to your project workspace. <ol style="list-style-type: none"> a Locate the appropriate project backup file: <ul style="list-style-type: none"> • Saleslogix v8.0 Project.Backup.zip - if you are upgrading from v8.0 non-Unicode • Saleslogix v8.0 Unicode Project.Backup - if you are upgrading from v8.0 Unicode • Saleslogix v8.1 Project_Backup.zip - if you are upgrading from v8.1 non-Unicode. • Saleslogix v8.1 Unicode Project.Backup - if you are upgrading from v8.1 Unicode <p>The project backup files are included in the service pack download files.</p> b Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. c In the Application Architect Project Explorer, open the project workspace you created in step 1, right-click the project, and then click Restore Project. d In the Select Project Backup File to Restore From dialog box, browse to the project backup on your local machine (step b). 3 Apply all Web hot fixes and Accelerators currently installed in your production environment to the new project. 4 Proceed to task number 17.

Required for	Task Description
Customized Web	<p>17 Create a bundle of your Web customizations.</p> <p>Note If you have not customized your Web implementation, disregard this task and proceed to task number 18.</p> <p>To create</p> <ol style="list-style-type: none"> 1 In Application Architect, open Project Explorer. 2 Right-click Bundle Model, and then click Create Manifest by Project Differences. The Select a Project to Compare Against dialog box opens. 3 Choose one of the following: <ul style="list-style-type: none"> • If your custom installation does not include hot fixes, select Project Backup and browse to the project backup you created in task number 15. • If your custom installation includes hot fixes and/or Accelerators, select Existing Project, and then select the project you created in task number 16. 4 Clear the Include deleted items that were added to the current project check box. Clearing this check box ensures that items in the project's Recycle Bin are not included in the customization bundle as delete items. 5 Click OK. The new manifest opens in the Application Architect. 6 On the New Manifest Properties tab, type a name in the Name box. For example, Customizations. 7 Save the manifest. 8 Expand Bundle Model, right-click the new manifest, and then click Create Bundle. 9 In the Save Bundle dialog box, browse to the location where you want to save the bundle, type a name, and then click Save. You will use this bundle in task number . <p>Note The bundle cannot be saved to a network drive. Save the bundle to a local drive or map the drive and save without using a UNC path.</p>
Prepare Your Infor CRM Database	
Microsoft SQL Server	<p>18 If you are using Microsoft SQL Server and have published your database for replication, remove replication. Remember to reset replication after your upgrade is complete.</p> <p>Note Merge and Snapshot Replication are not compatible with Infor CRM.</p>
All	<p>19 Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in the Administrator.</p> <p>Note See the "Integrity Checker" topic in the Administrator Help for instructions.</p> <p>If you are running the Integrity Checker on a database that is not located on the same network as the CRM Library and attachments, clear the Attachment and Library tests before you repair the database.</p>
All	<p>20 Make sure all users have signed off from Infor CRM.</p>
Remotes	<p>21 Instruct all Remote users and Offices to run a final synchronization cycle.</p> <p>Note Once the Main office is upgraded, remote users will still be able to synchronize changes to the host but will not be able to receive any changes.</p>
Remotes	<p>22 Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.</p>

Required for	Task Description
Remotes	23 Stop the Sync Service(s). If using a third-party scheduling package, deactivate the Synchronization Server tasks.
This task is required for all installations that included Intellisync for Saleslogix (host and Remote Office)	24 Delete the Intellisync portal from IIS and the folders from the file system before upgrading Intellisync for SalesLogix was replaced by Outlook Sync in v8.1. To install Outlook Sync, see task number 72. Note We do not recommend attempting to use Intellisync in an 8.2 environment. To delete <ol style="list-style-type: none"> 1 Open IIS. 2 Expand the SalesLogix web site. 3 Right-click the SixIntellisync portal and select Delete. 4 Close IIS. 5 Browse to C:\inetpub\wwwroot. 6 Right-click the Intellisync folder and select Delete. 7 Reset IIS.
This task is required for all installations that included Intellisync for Saleslogix (host and Remote Office)	25 Delete the Intellisync portal(s) from Application Architect. To delete <ol style="list-style-type: none"> 1 On the Application Architect View menu, click Deployment Explorer. 2 Expand Deployments. 3 Right-click the Intellisync portal and then click Remove Selected. 4 If necessary, repeat steps 2 and 3 to delete the Remote Office Intellisync portal.
This task is required for Clients (Network and Web) where Intellisync for Saleslogix had been installed.	26 Instruct all users to uninstall Intellisync. Uninstall using the operating system Add/Remove programs feature.
All	27 Close all Infor CRM applications and stop all applications and services that access the Infor CRM (Saleslogix) database using the Infor CRM OLE DB Provider.
All	28 Back up your production database. Verify the backup is successful and complete. You may also want to create a backup at various points in the upgrade process. For example, after running the patch but before installing bundles. Then, if you need to revert your installation, you can choose a backup created during the upgrade without having to start from the beginning.
This task is required if you are upgrading a LAN only environment and use Infor CRM (SLX) Address Book with Microsoft Office.	29 Infor CRM implementations that are Windows Client-only (no Web) and use the Infor CRM (SLX) Address Book, Insert VCard, Insert Contact Card, and Insert Library Doc features in Microsoft Outlook must install the Web Host and build and deploy the SData portal and client to continue to use those features in v8.2. Refer to Chapter 5 Installing the Web Components in the <i>Infor CRM Implementation Guide</i> for instructions.

Required for	Task Description
All	<p>30 Upgrade your main office computers using the Administrative Tools and Servers installation. This includes the Administrative Workstation, Synchronization Server, SpeedSearch Server, and Job Server.</p> <p>Note The installation creates folders and applies permissions necessary for Infor CRM to function. To avoid unexpected results, We recommend contacting Infor CRM Technical Support or your Business Partner before changing default settings on these folders.</p> <p>The Administrative Tools and Servers installation allows you to select one or multiple applications to install on the same computer. The installations remove only the applications with a prior version and then install ONLY the applications for the installation that you selected. For example, if you have the Administrator, Architect, and Infor CRM Client on your Administrative Workstation computer and you run the Administrative Tools and Servers install, only the Administrator and Architect will be removed and reinstalled. To upgrade the Sales Client, you must then run the Network Client install at which point only the Infor CRM Client will be removed and reinstalled.</p> <p>Important:</p> <ul style="list-style-type: none"> • The Job Service is required for Web Client functionality. • If you are a LAN-only installation and have been using the SLX Address Book (now rebranded to Infor CRM Address Book) and related features in Microsoft Outlook, see task number 29. <p>To upgrade</p> <ol style="list-style-type: none"> 1 Infor CRM media> Server Installation > Required Administrative Tools and Servers. <p>Note If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart.</p> <ul style="list-style-type: none"> • Click Install to allow Infor CRM to install the required components • Click Cancel to stop the installation. <p>For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.</p> <ol style="list-style-type: none"> 2 On the Welcome screen, click Next. 3 On the Setup Type screen, select an installation type. <ul style="list-style-type: none"> • Select Complete to install all program features and the Microsoft SQL Server databases. <p>Selecting this option installs Infor CRM using the Local System Account. To set a different user, particularly if SpeedSearch indexes include files located on another computer, select the Custom option.</p> <ul style="list-style-type: none"> • Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. • Saleslogix Server - installs the components that primarily handle logging and licensing for Infor CRM. This is required for all installations. • Administrator - installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses. • Architect - installs the component used to customize the Infor CRM Client. • Application Architect - required to configure and customize the Infor CRM Web components and portals.

Required for	Task Description
Upgrade your Main Office	
All	<p data-bbox="448 317 646 342">Task 30 - continued</p> <ul style="list-style-type: none"> <li data-bbox="570 380 1422 520">• Job Server - Installs the service used for scheduling tasks for immediate or delayed execution. You must install this service if your implementation includes any type of Infor CRM Client because it is required for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel. <li data-bbox="570 531 1422 590">• Messaging Event Server - enables communication between Infor CRM service components. This is required for all installations. <li data-bbox="570 600 1422 709">• Cache Server - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do not install on the SpeedSearch Server, and be sure to install only once per implementation. <li data-bbox="570 720 1422 779">• SData Synchronization Server - installs the service used for Integration functionality. <li data-bbox="570 789 1422 814">• SpeedSearch Server - installs the SpeedSearch Service. <li data-bbox="570 825 1422 884">• Synchronization Server - required if your installation will include remote users or a remote office. <li data-bbox="570 894 1422 978">• .NET Extensions - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework. <li data-bbox="570 989 1422 1047">• Utilities - multiple applications to aid with customization and database maintenance. <p data-bbox="496 1052 659 1077">4 Click Next.</p> <p data-bbox="496 1087 1422 1146">5 Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:</p> <ul style="list-style-type: none"> <li data-bbox="570 1157 1422 1236">• SQL Server sa password - If you have a password set on the sa account on the SQL Server, type the sa password. The installation requires this password to install and attach the Infor CRM databases. <li data-bbox="570 1247 1422 1327">• SQL Server sysdba password - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Infor CRM database. <li data-bbox="570 1337 1422 1417">• Use Local System Account - Select this option if the local user account has the correct security permissions to install Infor CRM. If you clear this option, set the information for the Infor CRM Service user. <li data-bbox="570 1428 1422 1453">• Domain - Type the network domain where you created the Infor Service user. <li data-bbox="570 1463 1422 1488">• User Name - Type the name of the Infor Service user (for example, SLXService). <li data-bbox="570 1499 1422 1524">• Password and Confirm - Type the Infor Service user's password. <li data-bbox="570 1535 1422 1644">• Port Change button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. <p data-bbox="496 1675 1422 1692">6 On the remaining screens, click Install and Finish to complete the installation.</p> <p data-bbox="540 1703 1422 1812">Note The installation process removes prior versions before installing the new applications. During this process, you may see the message "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.</p> <p data-bbox="496 1822 1422 1839">7 If prompted, restart your computer when the installation completes.</p>

Required for	Task Description
All	<p>31 If the Infor CRM Network Client is installed on your Administrative Workstation, run the Network Client installation to install the Client application.</p> <p>To upgrade</p> <ol style="list-style-type: none"> 1 Infor CRM media > Client Installations> Install Network Client. <p>Note If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation.</p> <ol style="list-style-type: none"> 2 In the Infor Network Client message box, click Yes. 3 On the Welcome screen, click Next. 4 On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> • Click Complete to install the most common components. • Click Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. 5 On the remaining screens, click Install and Finish to complete the installation. <p>Note The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.</p> 6 If prompted, restart your computer when the installation completes.
All	<p>32 Start the Administrator.</p>
<p>This step is required if you are upgrading from version 8.0.</p> <p>This step is not required if you are upgrading from version 8.1</p>	<p>33 Enter Infor CRM (Saleslogix) licenses.</p> <p>The upgrade from version 8.0 to 8.1 required that you apply new versions of all Saleslogix licenses. If you have not received these licenses, contact your Infor CRM Business Partner or CAM for more information.</p> <p>See the “Using the License Wizard to Add Licenses” topic in the Administrator Help for detailed steps.</p> <p>If you are upgrading from version 8.1, ignore this step and proceed to task number 34.</p>
All	<p>34 Upgrade the saleslogix.sxc.</p> <p>The saleslogix.sxc is a list of all the checks the Integrity Checker runs. The file has been updated for Infor CRM v8.2. The Integrity Checker, when opened, will create a new saleslogix.sxc if it cannot find one in the correct directory.</p> <p>To update</p> <ol style="list-style-type: none"> 1 Browse to C:\ProgramData\SalesLogix\Integrity Checker for Windows 2008. 2 Rename or delete the saleslogix.sxc. 3 In the Administrator, click on Tools and select Integrity Checker.
Install the Service Pack Bundle	
<p>This step is required if you are upgrading from Infor CRM (Saleslogix) version 8.1.</p> <p>If you are upgrading from version 8.0, see task number 36.</p>	<p>35 Use the Administrator to apply the Saleslogix v8.1.x to v8.2 Upgrade.sxb bundle.</p> <p>See the “Installing a Bundle” topic in the Administrator Help for instructions.</p> <p>The bundle is located in the Upgrades folder. The bundle contents are outlined in Chapter 3, “Plugin Changes in this Release”. This includes functionality formerly released in hot fixes.</p>

Required for	Task Description
<p>This step is required if you are upgrading from Saleslogix version 8.0.</p> <p>If you are upgrading from version 8.1, see task number 35.</p>	<p>36 Use the Administrator to apply the correct bundle(s) the following bundles in the order listed:</p> <ol style="list-style-type: none"> 1 Saleslogix v8.0x to v8.1 Upgrade.sxb 2 Saleslogix v8.1x to v8.2 Upgrade.sxb <p>See the “Installing a Bundle” topic in the Administrator Help for instructions.</p> <p>Note If you are running version 8.0 on Oracle, clear the Create Field [VirtualFileSystem:IsCompressed VarChar(1) NULL] statement in the v7.5.1 section of the bundle during installation. This statement causes an Oracle database to stop responding.</p> <p>The bundle is located in the Upgrades folder. The bundle contents are outlined in Chapter 3, “Plugin Changes in this Release”. This includes functionality formerly released in Updates.</p>
<p>Oracle</p>	<p>37 Instruct your Oracle DBA to run the OracleFixes.sql script.</p> <p>Running this script alters the TargetResponse table.</p> <p>Note The script can be run as the sys or sysdba user.</p> <p>To run</p> <ol style="list-style-type: none"> 1 Open Oracle SQL *Plus Worksheet or SQL Developer. 2 On the File menu, click Open. 3 Browse to the OracleFixes.sql script. The script is located in the Oracle folder. 4 To load the script into the Query section, click Open. 5 To run the script, click Execute.

Required for	Task Description
All	<p>38 Run the <code>SLXConversionUtility.exe</code>.</p> <p>This utility supports integration by adding columns to the Infor CRM (Saleslogix) database to enable a 1:many relationship for phone numbers and email addresses in Accounts and Contacts. When an integration imports accounts or contacts with multiple phone numbers or email addresses, it will be possible to see them in Infor CRM.</p> <p>To run</p> <ol style="list-style-type: none"> On the Administrative Workstation, browse to the SLXConversionUtility.exe and SLXConversionUtility.exe.config files. By default, these are in <code>.. \Program Files\Saleslogix</code>. Open the SLXConversionUtility.exe.config using the text editor of your choice. Scroll to the <code><connectionStrings></code> section and change the Initial Catalog value from <code>SALESLOGIX_EVAL</code> to your database alias. <p>For example:</p> <pre><connectionStrings> <clear/> <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabaseAlias;Data Source=localhost;Extended Properties='"PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/> </connectionStrings></pre> <ol style="list-style-type: none"> Double-click SLXConversionUtility.exe to open the utility. If your implementation will be synchronizing records, selecting all check boxes is recommended. However you may choose to select records as follows: <ul style="list-style-type: none"> For Accounting Integration, select Account - Creates email and phone records and Contact - Assigns UUIDS and creates email and phones. For Outlook Sync integration, select the check boxes above and add Activity - Assigns UUIDs. If your implementation will not be synchronizing records, select only Create Calendar Favorites, and Create Activity Attendees. These are required to support the Multiple Contacts for Activities features. Click Update. Log on using the Saleslogix Admin username and password. Click Close.
Reapply your Network Customizations	
Customized Network	<p>39 Apply the changes listed in Chapter 3, "Plugin Changes in this Release". You can use one of the following strategies:</p> <ul style="list-style-type: none"> Add your customizations to the Infor CRM plugins (recommended). Add the Infor CRM changes to your custom plugins. <p>After applying plugin changes, release the appropriate plugins using Architect.</p> <p>Note See the "Release a Plugin for Use" topic in the Architect Help for information on releasing plugins.</p>
Upgrade Synchronization	
Remotes	<p>40 Cycle your Synchronization Server(s) so that changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription.</p> <p>Note See the "Creating a Custom Sync Cycle" topic in the Administrator Help for more information.</p>

Required for	Task Description
All	41 Restart the Sync Service(s).
Upgrade Network and Remote Users/Offices	
All	<p>42 Run the Infor CRM Network Client installation on each of your Network user's computers.</p> <ul style="list-style-type: none"> • Run the Infor CRM Client installation. The Infor CRM Client can be installed on each user's computer using the Client installation. If you plan to run a custom installation, you must install the Client using the standard installation. See task number 31 for detailed steps.
Remotes	<p>43 Distribute Client installations to your Remote users and Offices.</p> <p>You can distribute a copy of the Infor CRM media, or the files and folders associated with a customized installation. For more information, see the <i>Infor CRM Implementation Guide</i> Appendix called "Customizing Client Installations".</p>
Remotes	<p>44 Direct each Remote Office to upgrade using the Remote Office installation.</p> <p>To upgrade</p> <ol style="list-style-type: none"> 1 Infor CRM Media> Server Installation > Remote Office Server. Note If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart. <ul style="list-style-type: none"> • Click Install to allow Infor CRM to install the required components • Click Cancel to stop the installation. For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. 2 On the Welcome screen, click Next. 3 On the Setup Type screen, select an installation type, and then click Next. 4 Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: <ul style="list-style-type: none"> • Use Local System Account - Select this option if the local user account has the correct security permissions to install Infor CRM. If you do not select this option, set the information for the SLX Service user. • Domain - Type the network domain where you created the SLX Service user. • User Name - Type the name of the SLX Service user (for example, SLXService). • Password and Confirm - Type the SLX Service user's password. • Port Change button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. • Configure Web Server - This option is available for Web Remote Office installations. Clear this option for non-Web Remote Offices. 5 On the remaining screens, click Install and Finish to complete the installation. Note The installation process removes prior versions before installing the new applications. During this process, you may see the message "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. 6 If prompted, restart your computer when the installation completes.

Required for	Task Description
Remotes	<p>45 Direct Remote users to upgrade the Infor CRM Client.</p> <p>Remotes should upgrade using the Remote Client installation on the Infor CRM media.</p> <p>To upgrade</p> <ol style="list-style-type: none"> Infor CRM Media > Client Installations> Install Remote Client. <ul style="list-style-type: none"> Note If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart. <ul style="list-style-type: none"> Click Install to allow Infor CRM to install the required components Click Cancel to stop the installation. For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. On the Welcome screen, read the information then click Next. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> Select Complete to install all components on this computer. Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. On the remaining screens, click Install and Finish to complete the installation. <ul style="list-style-type: none"> Note The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. If prompted, restart your computer when the installation completes.
Web Remotes	<p>46 Instruct Offline Web Client users to upgrade.</p> <p>Users do not need administrator rights to install or run the Offline Web Client. However, the Offline Web Client installation installs third-party prerequisites if they are not detected on the user’s computer. Administrator rights are required to install the following:</p> <ul style="list-style-type: none"> Windows Installer 4.5.1 Windows Powershell 1 Microsoft SQL Server 2008 R2 .Net Framework 4.5.1 or later Microsoft SQL 2005 Backwards Compatibility .Net AJAX Extensions Internet access to Microsoft.com <p>You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Infor CRM installation.</p> <p>Installing Without Administrator Rights</p> <p>To install the Offline Web Client without administrator rights, ensure you have installed all the prerequisites listed in the previous section. If the Offline Web Client installation does not detect the necessary prerequisites and the user running the installation does not have administrator rights, the Offline Web Client installation will not complete.</p>

Required for	Task Description
Web Remotes	<p>Task 46 - continued</p> <p>Installing With Administrator Rights</p> <p>To install the Offline Web Client and the required prerequisites, you must grant the user administrator rights for the computer on which you are installing Infor CRM. See your Microsoft documentation for instructions on granting administrator rights using one of the following options:</p> <ul style="list-style-type: none"> • Add each user to the local machine's Admin group for the duration of the implementation. • Use a domain user account that is a member of the domain admin group for the duration of the implementation. <p>To install</p> <ol style="list-style-type: none"> 1 Infor CRM media > Client Installations> Install Offline Web Client. 2 On the Welcome screen, click Next. 3 On the remaining screens, click Install and Finish to complete the installation.
Remotes	<p>47 Instruct Remote users and Offices to log on to the Synchronization Client and sync immediately after upgrading.</p> <p>Note Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.</p>
Upgrade Your Web Workspace	
All Web	<p>48 Upgrade the Web Host.</p> <p>Note To upgrade the Cache Server, see the Admin Tools and Servers installation.</p> <p>To upgrade</p> <ol style="list-style-type: none"> 1 You must log on as the local administrator to install the Web components on each machine. 2 On the Infor CRM Installation screen, click Server Installation. 3 On the Server Installation screen, click Web Host on IIS. <p>Note If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart.</p> <ul style="list-style-type: none"> • Click Install to allow Infor CRM to install the required components • Click Cancel to stop the installation. <p>For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.</p> <ol style="list-style-type: none"> 4 In the Infor CRM Web Host message box, click Yes. 5 On the Welcome screen, click Next. 6 On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> • Select Complete to install the Web Host. • Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. <p>If you installed the Saleslogix Cache Server on a computer other than the Web Host, you must manually configure the web.config file to access the Cache Server computer. See the "Configuring the Infor CRM Cache Server" topic in the Application Architect help for details.</p>

Required for	Task Description
All Web	<p>Task 48 - continued</p> <p>7 Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:</p> <ul style="list-style-type: none"> • Use an existing web site - If you want the installation to use an existing Web site, click this button and select the Web site name. If you created an SData portal or Outlook sync in the Administrative Tools and Servers installation, you can select the existing Saleslogix Web site for the Web components. • Create Web Site – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals. • Enter a Web site name – Type the name of the Web site that will appear in IIS. The default name is Infor CRM. • Port – Enter the port number that the Infor CRM Web site will use. Note the port number for future reference. You must use port number 1025 or greater. • Domain – Enter the network domain where you created the WebDLL user. • User Account – Enter the name of the WebDLL user you created. The default value is <i>WebDLL</i>. If you used a different name, type it exactly as you did when you created it. • Password and Confirm Password – Type the WebDLL user’s password. • Configure Saleslogix Database - Clear this check box if you do not want to connect to the Saleslogix database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled. <ul style="list-style-type: none"> • Saleslogix Server – Select or type the name of the computer on which you installed the Saleslogix Server. • Saleslogix Database Alias – Select or enter the name of the connection to the Saleslogix database. • Search for servers on port - Enter a port. By default, this is set to port number 1706. • User Name – Enter a Infor CRM user name (such as Admin). • Password – Enter the Saleslogix Server password for the Infor CRM user. <p>8 On the remaining screens, click Install and Finish to complete the installation. Note The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.</p> <p>9 If prompted, restart your computer when the installation completes.</p>

Required for	Task Description
All Web	<p>49 Open the Application Architect and update existing projects.</p> <p>All existing projects that you open in the Application Architect must be updated to the new v8.2 structure. This only changes the format of the project.xml file and some of the XML components. You must still restore the Saleslogix v8.1.0 Project.Backup.zip in task number 50. When opening a project created prior to version 8.2, you may be prompted to update the project format.</p> <p>To update</p> <ol style="list-style-type: none"> 1 Open the Application Architect. 2 The Application Architect automatically opens the last project you were working with and the Confirm Upgrade dialog box opens. 3 Click Yes. If you do not want to update the format of this project, and you want to choose a different project, click No. Then, open the project you want to update. 4 After updating the project, information about the update can be found in the Output Window.
All Web	<p>50 Restore the Infor CRM v8.2.0 project backup to the VFS workspace.</p> <p>Infor CRM provides a project backup file that contains all Web changes for this release. You must add these changes to upgrade your Web installation. When upgrading with project backups, you do not need to apply Web upgrade bundles.</p> <p>To guarantee that a client will always have access to the project model, deploy the client portal from a virtual file system-based project. It will always be accessible to the client because the VFS resides in the Infor CRM database. Remotes MUST be deployed from a VFS-based project, and it is recommended that production systems be deployed from a VFS-based project as well.</p> <p>To restore</p> <ol style="list-style-type: none"> 1 Locate the Saleslogix v8.2.0 Project.Backup.zip file. Project backups are located in the Upgrades\Project Backups folder. Note Additional project backups are available for use when creating a customization bundle (15). Use the Saleslogix v8.2.0 Project Backup file to receive all changes in this release. Disregard all other project backups when completing this task. 2 Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. 3 Open the Application Architect. 4 In the Project Workspaces window, select the VFS project workspace. 5 Right-click the project, and then click Restore Project. 6 In the Select Project Backup File to Restore From dialog box, browse to Saleslogix v8.2.0 Project.Backup.zip on your local machine (step 2). 7 Click OK.

Required for	Task Description
SLX Job Server	<p>51 Add Infor JobServer target and SlxJobService portal.</p> <p>The Job Server enables you to schedule single and recurring tasks for immediate or delayed execution, either manually or dynamically at run-time. It executes tasks out of process, releasing worker threads and memory for client sessions.</p> <p>Infor CRM Web Client functionality that requires the Job Server includes:</p> <ul style="list-style-type: none"> • Roll over incomplete activities • Update remaining days for active contracts • Update opportunities • Update leads • Delete leads • Reporting • Export to Excel <p>To add</p> <ol style="list-style-type: none"> 1 In the Deployment Explorer, right-click Core Portals and select Edit Deployment. 2 Right-click Deployment Targets and select Add Target(s). 3 In the Select Target(s) window: <ol style="list-style-type: none"> a In the Select Deployment Target(s) area, select the File System check box. b In the Select Portal(s) area, select the SlxJobService check box. c Click OK. 4 In the File System Target Settings area, browse to the location for the SlxJobService portal to be deployed to or enter the default path %ALLUSERSPROFILE%\Sage\Scheduling\Tenants. For example, C:\ProgramData\Sage\Scheduling\Tenants. <p>Note You can change the location path from the default setting, however you must also edit the Infor.Scheduling.Server.exe.configedit to reflect the change. See <i>An Introduction to Job Server in Infor CRM.pdf</i> for information on how to complete this task.</p>
Outlook Sync	<p>52 If your implementation includes Outlook Sync, you must deploy portals. Take the following actions for:</p> <ul style="list-style-type: none"> • Windows Network Client only: Install the Web Host. Build and deploy the SData portal. • Remote Office and Offline Web Clients: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment. • Windows Remote Client: no action required. The SData portal is deployed as part of the LAN Remote Client install.

Required for	Task Description
All web	<p>53 Build and deploy the portals. You must verify the build path prior to building.</p> <p>Note This step is strongly recommended for customized environments to establish a functioning Web Client before adding customizations.</p> <p>To build and deploy</p> <ol style="list-style-type: none"> 1 On the Tools menu, click Build Settings. 2 In the Build Search Path, verify that the path is set to: %BASEBUILDPATH%\assemblies;%BASEBUILDPATH%\interfaces\bin;%BASEBUILDPATH%\forminterfaces\bin 3 If you needed to edit the path, you must also clear the output folders. 4 On the Build menu, click Clean Build Folders. 5 On the Build menu, click Build Web Platform. <p>Note If an error message appears, log out of Application Architect, log back in, and repeat step 5.</p> <ol style="list-style-type: none"> 6 When the build has completed, click the Deploy All button.
All Web	<p>54 Close the Application Architect, stop and restart all Infor CRM services, and reset IIS.</p> <p>Note If you have not customized your Web implementation, proceed to task number 62.</p>
Customized Web	<p>55 Use the Application Architect to apply your custom bundle.</p> <p>Note If you have not customized your Web implementation, disregard this task.</p> <p>Install the bundle of your customizations (that you created in task number 17) to the new v8.2 project workspace.</p> <p>During the bundle installation, you can merge your customizations with the Infor CRM changes. You can also validate the changes if there are duplicate items between the current project and the bundle you are installing.</p> <p>Note The default behavior is to overwrite the item in the target project (the 8.2 Infor CRM version of the item) with your customization (from the customization bundle).</p> <p>After a merge, the modified file is the one that will be installed. It is not recommended to modify both files during a merge. However, if both files are modified, the file on the left is kept (unless your differencing tool specifies otherwise).</p> <p>Upgrading Customizations Technical Preview</p> <p>The QuickFormDiff utility is available as a technical preview in this release. (You can download this utility from the SLXToolsContrib repository at http://www.github.com/SageSalesLogix.) This utility provides a GUI interface that simplifies the process of merging your customizations with Infor CRM changes. If you follow the process documented in the <i>QuickFormDiff Utility Readme.doc</i>, you do not need to merge changes when applying your customization bundle as documented in this task. If you are using the QuickFormDiff Utility Readme with this Upgrade Workplan, install your customization bundle and overwrite all Infor CRM items.</p> <p>When you perform a multiple version upgrade (for example, from 8.0 to 8.2, you only need to merge customizations one time. This only applies to customizations, not other tasks.</p> <p>To merge changes during bundle installation</p> <ol style="list-style-type: none"> 1 In the Project Explorer, right-click your project folder, and then click Install Bundle. The Select Bundle to Install dialog box opens. 2 Browse to and select the bundle you created in task number 17 containing your customizations, and then click Open. The Install Bundle dialog box appears.

Required for	Task Description
Customized Web	<p>Task 55 - continued</p> <ol style="list-style-type: none"> 3 Verify the Bundle Path information is correct, and then click Next. The Optional Merged Content Path from a Previous Install option allows you to continue resolving conflicts from a prior bundle installation. If you have extensive customizations, you may have a large number of conflicts that must be resolved when applying your custom bundle. If you use Preserve Merged Content (step 6), you can resolve conflicts over an extended period of time. For example, you may be installing a customization bundle with 50 conflicts and you have resolved only 25 of the conflicts. If you click the Preserve Merged Content button, cancel the installation, then apply the same bundle at a later time, use the Optional Merged Content Path to browse to the folder with merged content. Then, you can continue to resolve the remaining 25 conflicts from your customization bundle. 4 On the Select Items screen, ensure the Entity Model and Portals check boxes are selected. This screen indicates the number of items that conflict with existing items in the current project. 5 Review the Support Files Bin folder for each portal application in your bundle and clear any DLLs that begin with Saleslogix. You must select the item and then clear the check box. Assembly support files that are developed by Infor CRM may be included in your customization bundle. These files are not necessary for the merge process. 6 If you want to save changes made during the bundle installation, click the Preserve Merged Content button. By default, all changes are saved to a temporary folder, and then deleted after the bundle installation is complete. When you preserve merged content, the folder containing merged customizations is not deleted. If you cannot resolve all conflicts at one time, click this button and use the Optional Merged Content Path from a Previous Install option when reapplying the bundle (step 3). 7 Clear the Only stop at items that require user intervention check box if you want to view only duplicate items in the bundle. By default, when this check box is selected and you move through the items in the tree view, the cursor stops only on items that require user intervention (such as determining which item to keep or how to merge duplicate items). The behavior at install for the duplicate items is controlled by the selected install action. 8 Use the Next Dup and PrevDup buttons to select and resolve any duplicate items. Items in red in the tree view indicate duplicates. These duplicates represent customized items in your bundle that are also in the project to which you are installing. A duplicate item with an install action set to DiffMerge requires the item to be merged before continuing the installation. 9 In the Install Action drop-down list, select DiffMerge. DiffMerge allows you to use a third-party differencing tool to compare a customization in your bundle with the duplicate customization in your project, and to merge the differences between the two. If you do not have a third-party differencing tool configured, you are prompted to configure one.

Required for	Task Description
Reapply Your Web Customizations	
Customized Web	<p>Task 55 - continued</p> <p>10 After making your changes, click Merge Item. The Merge Item button is enabled only when the DiffMerge install action is selected. If you clear a check box, the changes to that item will not be installed. Note Some bundle items have multiple files (resource files). Your differencing tool will display them twice; once for the main file, and once for the resource (.resx) file. If there are no changes in the linked .resx file, it does not display.</p> <p>11 (Optional) To modify an item in the Bundle Model tree view without having to use a differencing tool again, click an item in the tree view, and then click View Item. The View Bundle Item text editor opens. Note If you need to remove all changes you have made to an item, click Undo Changes. This removes all changes and reverts to the original state of the item in the bundle</p> <p>12 Click Next.</p> <p>13 Click Finish.</p>
Customized Web	<p>56 If necessary, apply your custom schema to the database. If the database you are restoring the project to is the database where your customizations were created, custom schema is already included. If you are applying a customization bundle that relies on custom schema to a new or different database than the database where the schema was developed, then you must also apply the bundle that contains your custom schema to the new database. You need to apply your custom schema if you created your customization bundle on a different database than the one on which you are applying the customization bundle.</p>
Customized Web	<p>57 Recreate your Dashboard customizations with the customization you recorded in task number 11.</p>
Customized Web	<p>58 Reapply customizations from the web.config file(s) to the web.config and appSettings.config file(s). Application settings have been moved from the web.config file to the appSettings.config file. Customizations to the appSettings section must be merged into the appSettings.config file. For more information see the “Editing Configuration Files” topic in the Application Architect help.</p> <p>To update</p> <ol style="list-style-type: none"> 1 In the Application Architect, open the web.config file. 2 Update the new web.config files with the customizations you recorded in task number 10. 3 In the Application Architect, open the appSettings.config file. 4 Merge any customization made to the appSettings section of the web.config file to the appSettings.config file.

Required for	Task Description
<p>This task is required if you are upgrading from version 8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>59 Update any custom quick forms where the Currency Control ExchangeRateType value is set to OpportunityRate or SalesOrderRate.</p> <p>In earlier releases, the Currency Control ExchangeRateType contained four enum values (Opportunity Rate, Sales Order Rate, Base Rate, My Rate). In this release, ExchangeRateType contains three values (Base Rate, My Rate, Entity Rate) and two deprecated values (Sales Order Rate, Opportunity Rate). For custom forms where the ExchangeRateType value is set to either SalesOrderRate or OpportunityRate it is advisable to change to EntityRate.</p> <p>To update</p> <ol style="list-style-type: none"> 1 Open the xml file that contains the quick form configuration metadata. The xml files will be listed in the build exception. For example, ...Model\Entity Model\SalesLogix Application Entities\SalesOrderItem\QuickForms\EditSalesOrderItem.main.quickform.xml 2 Find the ExchangeRateType node inside the ControlDefinition node for the currency control and change the value of the ExchangeRateType property from SalesOrderRate OR OpportunityRate to EntityRate. The following is an example of an updated ControlDefinition node: <ul style="list-style-type: none"> • Before: <pre data-bbox="570 877 1230 982"><SalesLogix:Currency runat="server" ID="curSubTotal" DisplayMode="AsText" ExchangeRateType="SalesOrderRate" DisplayCurrencyCode="true"> </SalesLogix:Currency></pre> • After: <pre data-bbox="570 1031 1198 1136"><SalesLogix:Currency runat="server" ID="curSubTotal" DisplayMode="AsText" ExchangeRateType="EntityRate" DisplayCurrencyCode="true"> </SalesLogix:Currency></pre>
<p>Customized Web</p>	<p>60 If you have custom code, review the list of breaking changes to the Infor CRM API and change references to classes and members in your custom code as appropriate.</p> <p>See the SDK Documentation area on Infor Xtreme for the API Change List for this and previous releases.</p>

Required for	Task Description
<p>Customized Web</p>	<p>61 If you are applying a custom bundle, you will need to reapply the new Icons delivered in v8.2.</p> <p>Bundles created on versions of Infor CRM (Saleslogix) prior to version 8.2 may contain icons that will over-write the new icons delivered in version 8.2. Examples of these kinds of bundles include a custom bundle from your Business Partner, or an Infor CRM Add-On component such as Infor CRM Advanced Analytics. To address this, re-apply the new icons by applying the bundle named 8.2 Images VFS.zip.</p> <p>To install the bundles</p> <ol style="list-style-type: none"> 1 Browse the Infor CRM media, expand the Bundles folder, and copy the 8.2 Images VFS.zip to a convenient location. 2 Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties. 3 Open the Application Architect. 4 In the Project Explorer, right-click the project, and then click Install Bundle. 5 Navigate to the folder where you copied the 8.2 Images VFS.zip, and then click Open. 6 On the Select Bundle screen, click Next. You will receive a message that the bundle contains items that conflict with existing items in this project. Accepting all of the icons in the bundle is recommended, however if there are icons you specifically customized, you may prefer to go through the merge process. See the Application Architect help file topic called 'Merging Changes During Bundle Installation' for instructions. 7. On the Select Items screen, ensure the Portals option is selected. 8. Click Next, and then click Finish.
<p>Optional</p>	<p>62 Users will need to reset their user options when they log into the Infor CRM Web Client. Instruct users to update their user options by clicking Tools > Options.</p>
<p>This task is required if you are upgrading Infor Mobile</p>	<p>63 Convert your mobile customizations.</p> <ol style="list-style-type: none"> 1 Change all modules (files) to use AMD loading. 2 Change all Ext calls to Dojo equivalents. 3 Verify that all modules names are fixed to reflect the new folder structure. 4 Verify that any property name changes do not affect your views or customization's. 5 Verify that the changed function names/removal do not affect your views or customization's. 6 Consider the newly added properties and methods to enhance existing customization's.
<p>Build and Deploy your Customized Web Portals</p>	
<p>This task is required for Customized Web</p>	<p>64 Use the Application Architect to build and deploy the appropriate Web portal(s). Use the Rebuild Web Platform option on the Build menu when upgrading existing portals. See the "Rebuilding the Web Platform" and "Deploying Portals" topics in the Application Architect Help for instructions.</p> <p>Note Offline Web Clients must be deployed using the Virtual File System (VFS). Deployments created from a local file system are not supported and will not function correctly.</p>

Required for	Task Description
All Web	<p>65 Clear the web browser's cache.</p> <p>Before logging into the upgraded web client, instruct users to clear the cache of the web browser.</p> <p>For detailed steps, please refer to your browser's help.</p>
<p>This task is required if you are upgrading from version 8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>66 Run the Role Security utility to update roles and secured actions.</p> <p>Note If you modified the default roles by removing a role or removing a secured action from a role, note all your changes or create a backup of your roles before proceeding.</p> <p>The Role Security utility must be run to upgrade Web Client roles. The utility modifies existing roles and secured actions using the following rules:</p> <ul style="list-style-type: none"> • If you removed a default Infor CRM role, the utility adds the role. • If you removed a secured action from a default Infor CRM role, the utility adds the secured action back to the role. • If you added a secured action to a default Infor CRM role, the utility leaves the added actions in the role. • If you created custom roles, the utility does not modify custom roles. <p>To run</p> <ol style="list-style-type: none"> 1 On the Administrative Workstation, browse to the ...Program Files\SalesLogix folder. The utility is installed with the Administrative Tools and Servers installation. 2 Right-click the RoleSecurityInstall.bat file, and then click Edit. 3 Modify the following values to match your environment: <ul style="list-style-type: none"> • SLXServer • Alias • Port • Password 4 Save your changes and close the .bat file. 5 Double-click the RoleSecurityInstall.bat file to run the utility. <p>Note For information on the arguments of this utility, type the utility name at a command line prompt in the Infor CRM install directory on the Administrative Workstation.</p>
<p>This task is required if you are upgrading from version 8.0.</p> <p>This task is not required if you are upgrading from version 8.1.</p>	<p>67 Add your customizations to the MergeConfiguration.xml and PotentialMatchConfiguration.xml files.</p> <p>Use the customizations recorded in task number 16 to merge your customizations with the updated Infor CRM file.</p> <p>To merge</p> <ol style="list-style-type: none"> 1 In the Web Client, convert a lead. Converting a lead automatically creates an updated MergeConfiguration.xml and PotentialMatchConfiguration.xml files. 2 In the Application Architect, open the Virtual File System Explorer. 3 In the tree view expand Configuration, and then expand Global. 4 Add your customizations to the updated MergeConfiguration.xml and PotentialMatchConfiguration.xml files.

Required for	Task Description
Remotes	<p>68 Cycle your Synchronization Server(s) so changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription.</p> <p>Note See the “Creating a Custom Sync Cycle” topic in the Administrator Help for more information.</p>
All Web	<p>69 Import your upgraded project to the VFS.</p> <p>After upgrading, you may want to import your upgraded project (stored locally) to the Virtual File System (containing the older project). This ensures the project in the VFS is the most recent version.</p> <p>For detailed steps to import the project, see the “Importing from Another Project” topic in the Application Architect Help.</p>
Web Client (optional) Customer Portal (optional)	<p>70 Configuring Password Self-Service</p> <p>Password self-service is available for the Infor CRM Client and for the Customer Portal. This feature allows users to reset their own passwords and request their usernames.</p> <p>The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file.</p> <p>Note When editing the appSettings.config file, be sure to do so in the VFS. If you edit in the file system, your changes may be overwritten if the appSetting.config file is redeployed.</p> <p>To turn password self-service on</p> <ol style="list-style-type: none"> 1 Open the Application Architect and expand the Project Explorer. 2 Expand Portal Manager>SixClient>Support Files, and then click appSettings.config. 3 Scroll through the file to locate “Defines the settings for sending email”. 4 Edit using the instructions in the appSettings.config file for guidance. 5 Save your edits, 6 Deploy the SixClient portal. 7 If necessary, repeat these steps to turn Password Self-service on for the Customer Portal. <p>Note To use such email services as Gmail and Hotmail, the enableSSL setting must be set to True both in the appconfig settings and also on the mail service being used.</p>

Required for	Task Description
All Web	<p>71 Instruct Web Client and Offline Web Client users to download the Desktop Integration Module.</p> <p>Desktop Integration extends Infor CRM Web Client functionality by downloading client-side files for the following features:</p> <ul style="list-style-type: none"> • Office Integration encompasses Mail Merge, Export to Excel, and Drag and Drop functionality. Administrators can also drag-and-drop library files. In v8.1 Export to Excel was removed. • Outlook Integration encompasses Send to CRM and Record to History. In v8.1 it also includes Infor CRM Address book, Insert Library item, Insert vCard, Insert Contact vCard, and Outlook Sync. <p>Before users install and configure these features, ensure you configured SData as detailed in task number 70.</p> <p>Note Offline Web Client users must download the Desktop Integration Module to use Web Reporting.</p> <p>To install and configure</p> <ol style="list-style-type: none"> 1 Open the Web Client sign on screen. <ul style="list-style-type: none"> • For Web Client users, open the Infor CRM Web site. • For Offline Web Client users, in your System Tray, right-click Personal Web Server, point to SlxClient, and click Open Site. 2 Click Enhance Infor CRM. You must be a Power User or Admin user to install Desktop Integration. 3 Click the associated Find out more link to open the “Installing and Using Infor CRM Desktop Integration” help topic for browser specific configuration information.
Perform Post-Upgrade Tasks	
Outlook Sync	<p>72 Installing Outlook Sync</p> <p>Intellisync for SalesLogix has been replaced by Outlook Sync in v8.1. Outlook Sync enables users to share Infor CRM activities and contacts with Microsoft Outlook.</p> <p>Outlook Sync requires that an SData portal be deployed.</p> <p>If your installation is:</p> <ul style="list-style-type: none"> • Windows Network Client only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals. • Remote Office and Offline Web Clients: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment. • Windows Remote Client: no extra actions required. Deployed as part of the LAN Remote Client install.

Required for	Task Description
Outlook Sync	<p>73 Activate Outlook Sync.</p> <p>To activate</p> <ol style="list-style-type: none"> 1 Sign on to the Infor CRM Web Client as Administrator. 2 In the Navigation bar, click SData Sync Configuration. 3 Set up the SData feed: <ol style="list-style-type: none"> a Saleslogix Feed: This box auto-populates with the information you enter into the fields below. b Use SSL: Select if your implementation uses SSL. Strongly recommended for security c Port: Accept the default (3333) unless you changed the port used for the SData portal. d Data Portal: Auto-populates with SData. This is the default, unless the name was changed in Application Architect when deploying the portal. e User Name: Admin f Password: Password for the Administrator user. g Display Name: Type a name to identify the Saleslogix Feed. h Click Test Link. If the test fails, verify the information entered in steps a through g. 4 On the Integrations tab, locate OutlookSync and select the Enabled check box. 5 Click the Save icon.
Outlook Sync	<p>74 Notify your users of the following:</p> <ul style="list-style-type: none"> • Network Client users: Outlook sync is installed with the Infor CRM Network client. • Web Client users: On the Web Client Log On screen, users must click Install enhancements. <p>In both installation scenarios, the first time the user opens Microsoft Outlook after Infor CRM (Saleslogix) has been installed/updated, he or she will be invited to configure Outlook Sync.</p> <p>To configure</p> <p>In the Infor CRM Connector Options window, set the following options:</p> <ol style="list-style-type: none"> 1 Connection <ol style="list-style-type: none"> a On the Connections tab: accept the default server url unless prompted to enter a different URL by your system administrator. The default server url is typically http://<webserver>:3333 b User name is the name you use to log on to the Infor CRM Client. c Password is your Infor CRM Client password. 2 Sync <ol style="list-style-type: none"> a The sync options enable you to specify what records sync (Contacts, Appointments, Tasks) and the direction in which they sync (one or two way b Sync interval determines how often the sync cycle recurs. The default setting is 5 minutes. Setting a more frequent cycle may impact performance. <p>Note The sync interval is the time between when the sync cycle ends and when it begins again. Consider the following scenario: Your sync cycle has begun and takes 10 minutes to complete. During that time, you add more records to be synced. Your new records will not begin to sync until 5 minutes after the current cycle ends.</p>

Required for	Task Description
	<p>Task 74 (cont.)</p> <p>c Sync interval determines how often the sync cycle recurs. The default setting is 5 minutes. Setting a more frequent cycle may impact performance.</p> <p>Note The sync interval is the time between when the sync cycle ends and when it begins again. Consider the following scenario:</p> <p>Note Your sync cycle has begun and takes 10 minutes to complete. During that time, you add more records to be synced. Your new records will not begin to sync until 5 minutes after the current cycle ends.</p> <p>3 Select any of the following for Send To CRM and Record to History:</p> <ul style="list-style-type: none"> • Prompt for Duplicate Contacts - Prompts you when a duplicate contact or lead is detected. • Prompt for Contacts - Prompts you to select which contacts or leads the history item should be associated with. • Prompt for Unresolved Contacts - Prompts you when a contact or lead is not found in the database. • Display History Details before saving - Prompts you with the Complete E-mail dialog box before an e-mail message is recorded to history. • Select the Display Tray Notifications check box if you want to see pop-up messages that describe Desktop Manager activities as they occur. • (Optional) set a minimum Image Attachment size to ignore. And specify types of files to ignore. For example, you may want to ignore the tiny images people use for their signatures. Default setting is 0. Type in the file type. • Enable Record to history for appointments. <p>4 Address Book</p> <p>a Set the contact name display options (first, last or last, first).</p> <p>b Under When showing Address Book, select any of the following options:</p> <ul style="list-style-type: none"> • Show Groups as separate folders – In the Outlook Address Book dialog box, each of the Saleslogix groups appears under Infor CRM Address Book. If you select a group, such as Latest Contacts, all of the contacts in the group appear. If you do not select the option, only Ad Hoc groups appear under the Infor CRM Address Book. • Show Accounts as Distribution Lists – In the Outlook Address Book dialog box, you can select Accounts under the Infor CRM Address Book. Each account appears as a distribution list. If you do not select this option, accounts are not available under the Infor CRM Address Book. • Show Opportunities– In the Outlook Address Book dialog box, you can select Opportunities under the Infor CRM Address Book. Each opportunity appears as a distribution list. If you do not select this option, opportunities are not available under the Infor CRM Address Book. <p>5 Logging</p> <ul style="list-style-type: none"> • Enable logging only if there are issues and you want to troubleshoot. <p>6 All Options</p> <ul style="list-style-type: none"> • Named value pairs. Use to add custom properties to the Connector Options. <p>7 Sync tab</p> <p>Use this window to specify how you want information to be exchanged between Infor CRM and Outlook. The options allow you to specify the Ad Hoc group to use to store the information that will be synced back and forth. The default name is SyncSaleslogix, but your administrator may have created the group under another name.</p>

Required for	Task Description
Optional	<p>75 Enable HTTP Compression on IIS 7 with IIS 6 compatibility.</p> <p>Note IIS 6 compression is documented in the <i>Infor Implementation Guide</i>.</p> <p>If your Web site(s) use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.</p> <p>You must be a member of the Administrators group on the local computer to enable compression.</p> <p>By default, only static compression is enabled in IIS 7. Enabling dynamic compression will provide significantly smaller files over the network. In addition, there are a number of configuration elements that may be modified to provide more benefits. You may need to try different settings to achieve optimum results.</p> <p>The following information can be used as a guide to implement compression in your Infor CRM implementation. To help evaluate and test your specific compression settings, you may want to use a third-party HTTP compression debugging tool.</p> <p>To enable</p> <ol style="list-style-type: none"> 1 Open IIS Manager, and select your Infor CRM Web site. 2 Under IIS, double-click Compression. 3 Select the Enable dynamic content compression check box. If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box. 4 In the Actions pane, click Apply. <p>If necessary, modify the ApplicationHost.config file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.</p> <p>In IIS 7 the configuration file replaces the Metabase Explorer compression values used in IIS 6. For more information, see the Microsoft IIS Web site at http://www.iis.net/ConfigReference.</p> <ul style="list-style-type: none"> • Example Configuration Settings: <pre><httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files" maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false" > <scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10"/> <scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10" /> <staticTypes> <add mimeType="text/*" enabled="true" /> <add mimeType="message/*" enabled="true" /> <add mimeType="application/*" enabled="true" /> <add mimeType="*/*" enabled="false" /> </staticTypes></pre>

Required for	Task Description
Optional	<p>Task 75 - continued</p> <pre data-bbox="548 327 1156 527"> <dynamicTypes> <add mimeType="text/*" enabled="true" /> <add mimeType="message/*" enabled="true" /> <add mimeType="application/*" enabled="true" /> <add mimeType="*/*" enabled="false" /> </dynamicTypes> </httpCompression> </pre>
<p>This task is required if you are upgrading from a Unicode enabled installation</p> <p>This task is not required if you are upgrading from a non-Unicode installation</p>	<p>76 If your Infor CRM installation is Unicode-enabled, manually update the Provider Extensions.</p> <p>In some Unicode installations, users with multi-byte character user names cannot log on to Infor. To fix this issue, complete the following configuration steps.</p> <p>To configure</p> <ol data-bbox="496 764 1427 1339" style="list-style-type: none"> 1 On the Infor media, browse to the SDK Examples > Provider Extensions folder. 2 Copy the Provider Extensions folder to your Saleslogix Server (or to any computer that can connect to the Saleslogix Server). 3 From the Provider Extensions folder, open the test.udl file in the OLE DB Core Services application. 4 Set the following values in the test.udl file, test the connection, and then click OK. <ul data-bbox="542 961 1003 1136" style="list-style-type: none"> • Saleslogix Server • Database Name • Infor user name (generally admin) • Infor CRM user name password • Select the Allow Saving Password option 5 Open a command prompt and change the directory to the Provider Extensions folder. 6 At the command prompt run the following command: <code>slxproviderplugin -m slxproviderextension\provider_extensions.xml -u test.udl -i -d</code> The "*** SUCCESS: Plugin installed successfully" message displays when the plugin has been installed. 7 Restart all Infor CRM Servers.

You have completed your upgrade.

See [Chapter 2, "Changes in this Release" on page 33](#) and the "What's New in this Release" topic in the online Help systems for an explanation of the new features.

See [Chapter 3, "Plugin Changes in this Release" on page 41](#) for information about the plugin changes in this release.

Chapter 2

Changes in this Release



This chapter lists all of the changes to Infor CRM (Saleslogix) since version 8.0. See the “What’s New in this Release” topic in the online Help systems for more information about the new features.



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

Changes in version 8.2

In addition to improved product stability due to defect fixes, v8.2 contains the following new functionality.

General Enhancements

- Saleslogix is now Infor CRM. Look for the new branding throughout the product. Some installed components and registries have retained the name Saleslogix.
- Mobile Client, Web Client, and Customer Portal, are rebranded with the new Infor CRM and product colors.
- Documentation and help files are re-branded with the Infor CRM name and product colors.
- Mobile Client, Web Client, and Customer Portal have been updated to use Infor terminology - Sign in and Sign out instead of Log on and Log off.
- [\[Breaking Change\]](#) Infor CRM has upgraded the DoJo framework to version 1.10.3. If your customizations use Infor CRM widgets, you should not see any issues. However, if you are using your own dijit widgets, refer to the list of changes for Dojo 1.8, 1.9, and 1.10 to determine the possible impact for your user case.
 - 1.8: <https://dojotoolkit.org/reference-guide/1.9/releasenotes/1.8.html>
 - 1.9: <https://dojotoolkit.org/reference-guide/1.9/releasenotes/1.9.html>
 - 1.10: <https://dojotoolkit.org/reference-guide/1.9/releasenotes/1.10.html>

Web Client Enhancements

- A refreshed user interface provides a more modern user experience.
- [\[Breaking Change\]](#) Users can opt to display the Web Client interface in a different language without having to change the browser language. This option is available on the sign on screen. If your customizations are configured to look at the regional or browser settings, you must now configure them to look at the language option.
- New contact import feature
- Users can now delete multiple contacts

Web Client Administrator Enhancements

- The following features are available to users with appropriate role access (administrators and administrator roles):
 - New Group Manager feature enables visibility into such group usage as number of groups in the system, who owns each group, and with whom they are shared.
 - New Filter Manager features enable adding, editing, and deleting filters.

Mobile Enhancements

- Quick Actions: New Configure icon allows you to change the visibility and order of items in the Quick Actions pane.
- Activities: New field caching feature allows you to add an activity to the calendar using pre-populated fields from the last record you were looking at (Account, Contact, and so forth.)
- Opportunities: New Quick Edit view enables you to quickly see list view information and take immediate action on opportunity-related tasks.
- List views and Chart views: You can now refresh the data in these views by pulling from the top of the list.
- Charts: Updated features:
 - New Donut graph added to the “average” KPIs,
 - New Line chart
 - New color scheme
 - KPI charts now have a legend .
- Group list enhancements:
 - New layout configuration
 - Users can choose the number of fields visible from the group list view.
 - Columns in the group list view enable large cards and large groups to be easier to read.
 - New text label colors improve discoverability of the information that matters to you.
 - Improved Group List User Interface: The Lookup feature is now located in the header bar.
 - New "relative" date format in the fields enables the date to display as "today" or "in two weeks" instead of in the standard mm/dd/yyyy date format.
 - Currency format setting in the LAN/Web Client now enables displaying currency values in green.
- Detail view enhancements:
 - Coloration makes the Detail view Quick Actions easy to discover and read.
 - Flattened Detail tab reduces the number of visible fields. The non-essential detailed information has moved to the “More Details” tab and is collapsed by default.
 - Re-introduced the popular Collapsible tabs feature.
 - The Related Items user interface now contains “count” icons.

Application Architect Enhancements

- [\[Breaking Change\]](#) Right-alignment in the new Infor templates removed two Application Architect control properties: Label Placement and Caption Alignment. This impacts multiple controls. If your customizations used these two properties, the settings will still be in your code, but the new Infor CRM control templates no longer contain the logic to render the old layout. The code will ignore your customizations and defer to the Infor left placement/right alignment layout. To preserve your old layout you must merge your existing code with the new Infor CRM control templates.
- [\[Breaking Change\]](#) The Font Awesome 4.3.0 library (distributed under /Libraries/ with the Sixclient and SixCustomerPortal portals is now used in both the Mobile and Web Client interfaces. The top header and the title pane portions of the UI are now served as Font Awesome font items instead of images. Changes to these icons in Global_Images.resx or in the Images/Icons folder will no longer be reflected.
- Faster compilation of portal pages by ASP.net due to removing unused assemblies, and refactoring variables and event handlers.

- Automatic promotion of ANSI entity string properties to Unicode removes the need to create one set of bundles for ANSI databases and another for Unicode databases.
- A new Bundle Explorer view is available from the View menu.
- Two new Bundle Action Types have been added:
 - Add Secured Actions
 - Create Database Object Definition

Changes in Version 8.1

In addition to improved product stability due to defect fixes, v8.1 contains the following new functionality.

General Enhancements

- The new Outlook Sync feature enables you to share your Saleslogix activities and contacts with Microsoft Outlook. This replaces Intellisync for Saleslogix, which had been built on Nokia's discontinued Intellisync product.

Web Client Enhancements

- Three new widgets are available in the Web Client:
 - The SData Widget enables Web Client users to display information from pre-defined data feeds on their dashboards.
 - The Web Feed Widget enables users to list and access the RSS and/or Atom feeds of their choice from the Saleslogix Web Client dashboard.
 - The Website Widget enables users to display the web site or microsite of their choice inside their Saleslogix dashboards.
- Web Client users can now associate multiple attendees per activity.
- Web Client reporting has been modified to use the new Job Manager.
- The Sync Job entity now has a New Sync History tab.
- The new Sync History List view allows users to review Integrations synchronization history, including Outlook Sync history.
- Web Admin now includes:
 - OAuth support for integrations.
 - Users with Administrator privileges will see Integrations List and Detail views. The Integration Detail view contains connection and synchronization information and may include tabs for scopes, links, resources, and options.
 - The ability to associate a user with a contact.
 - The ability to set up an SData feed to synchronize Saleslogix with integrated systems.
 - Job Manager, a user interface for the Job Service.

Windows Client Enhancements

- Multiple attendees per activity functionality is not available in the Windows Client. However, in installations where both the Windows and Web Clients are in use, when the Activity is completed in the Web Client, history viewed in the Windows Client will show all of the attendees.
- [\[Breaking Change\]](#) SLX Address Book in Microsoft Outlook, insert VCard in Microsoft Outlook, insert ContactCard in Microsoft Outlook, and Insert Library doc in Microsoft Outlook all require the SData portal. For LAN -only implementations to use these features, you must install the Web Host, and build and deploy the SData portal.

Reporting Enhancements

- The Web Reporting server is no longer required. Web Reporting now leverages the Job Server. If your environment includes the Job Server, and the documents logging folder has been created and shared as described in the Implementation Guide, there are no additional steps to install reporting.
- **[Breaking Change]** Prior to v8.1, Saleslogix used the Crystal Reports ActiveX Designer Run Time Library 11.5.API when working with Crystal Reports documents (*.RPT), however, this COM library was deprecated in subsequent Crystal Reports versions. Saleslogix 8.1 installs "SAP Crystal Reports, developer version for Microsoft Visual Studio". This is a .NET based runtime; the COM interface no longer exists.
- A new COM Library exposes reporting COM objects that are part of the API facade of portions of the original Crystal Reports COM API. This enables Saleslogix Network Client (including VBScript), Architect, Administrator, and so forth to work with the underlying .NET API.
- Saleslogix Windows Client continues to use Crystal Reports. For versions of the components being installed, see the Compatibility Guide.
- In implementations where Crystal Reports is installed for the Windows Client, it must be standalone. Saleslogix cannot integrate with the Crystal Reports Server. This is a contractual obligation with SAP.

Application Architect Enhancements

- SData attachments endpoint now supports dynamic schema updates.
- The Job Service API now provides a simple method to trigger and query jobs from an entity event or business rule.

Mobile Enhancements

- Updated logos and color scheme. Color scheme can now be customized.
- Key Performance Indicators (KPIs) are available for Opportunities, Tickets, Leads, Contacts, Accounts, and Notes\History.
- Improved filtering: List views have default search hashtags, such as #my-accounts, #my-contacts.
- A new right menu provides easy 'contextual' access to features depending on List type, such as:
 - The lookup/search box (moved from the top of the list).
 - All hashtags available for the list. Click the hashtag to insert that tag into the Search field, remove the tag, or replace it with a different one.
 - Any KPIs available for a record type. Click a KPI to display or clear it from the top of the list.
- Improved usability:
 - New List view card layouts provide more quick actions and updated quick action icons.
 - A new attachment quick action enables adding an attachment from accounts, contacts, leads, tickets or opportunities.
 - A mobile phone field is now available on the Lead list, Edit, and Detail views.
 - A phone number field is now available on Activity Insert and Edit views. It is automatically populated with information from the Account or Contact record.
 - The Activity List view displays dates in relative terms (3 hours ago, in 2 years, and so forth.).
 - New "Lazy Load" list feature enables more records to become visible when you reach the bottom of a list.
 - Icon access enables you to go to the Global menu from any Saleslogix Mobile Client page.
- New camera support enables you to capture and upload a picture to your Saleslogix attachments.
- New Attachments support enables adding an attachment to any record, finding an attachment using Lookups, searching through a list of attachments, and opening an attachment associated to a Sage SalesLogix record. The supported attachment types are PNG, BMP, TIF, GIF, and JPEG, but your ability to view will be determined by the viewers available on your device.
- My Activities enables seeing the activities in which you are a leader or member.

Changes in this Release

- Use My Activity Quick Actions to complete, accept, or decline an activity, and to make a call. You can also make notes after your call.
- Add, edit, and delete Opportunity Products through the Mobile Client.
- The SpeedSearch feature for locating records stored in Saleslogix is now available on the Mobile Client.
- The Mobile Client now supports multi-currency.

Deprecated Components

- Web Reporting server is no longer required. Web reporting now uses the Job Manager.
- Intellisync for Saleslogix, which had been built on Nokia's discontinued Intellisync product, is not supported in v8.1. Saleslogix uses the new Outlook Sync feature to share your Saleslogix activities and contacts with Microsoft Outlook.

Changes in this Release

Chapter 3

Plugin Changes in this Release



In addition to the new functionality described in [Chapter 2, “Changes in this Release”](#), Infor CRM 8.2 fixes product defects. This includes defects previously addressed in hot fixes. Refer to the Fixed Issues List on the Infor Support Portal Web site for more information.

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

Finding Script Changes

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

To find script changes

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

New Tables

Use the following to identify tables that were added in Saleslogix 8.1 or Infor CRM v8.2. See the Database Manager and the Database help system for information about the fields that are included in these tables.

Table Name	Purpose	8.1	8.2
ACTIVITYATTENDEE	Stores additional contacts and leads for Activities. Added for multiple attendees per activity functionality.	✓	

Plugin Changes in this Release

Table Name	Purpose	8.1	8.2
CONTACTAUDIT	Contains information about a contact's sign in and usage history		✓
CONTACTUSER	Associates a contact to a Saleslogix user. Added for multiple attendees per activity functionality.	✓	
DB_OBJECTDEFINITION	Stores definitions of database-specific database objects such as Views and Triggers.	✓	
GLOBALCHANGETRACKING	Stores the history for all changes made to specific tables by the triggers on those tables. Used by Outlook sync functionality to retrieve any changes (Inserts, Updates, or Deletes) that were made to Saleslogix.	✓	
GROUPSTATS	Stores group usage statistics that can be used to manage large numbers of groups. Group statistics are updated using the TrackGroupUsage method in GroupBuilder. The method is called from the Groups SystemAdapter endpoint when a group response is sent back to the client.		✓
HISTORYATTENDEE	Stores the history of the activity attendee table for completed activities and history of User_Activities. Added for multiple attendees per activity functionality.	✓	
IMPORTCONFIGURATION	Stores import information that can be reused as an import template.		✓
INTEGRATION	Maintains a list of third party applications that provide a means of synchronization with Saleslogix.	✓	
INTEGRATIONRESOURCE	The list of resources available for synchronization with an integration. Example tradingAccounts, contacts, etc.	✓	
OAUTHPROVIDER	Stores the set of OAuth providers available to the system and to users. Added for integration functionality.	✓	
OAUTHPROVIDERSCOPE	Stored the set of permissions the provider needs to be asked for. Added for integration functionality.	✓	
REPORHISTORY	Stores the history for reporting job executions.	✓	
USERAUDIT	Contains information about a user's sign in and usage history.		✓
USER_OAUTHTOKEN	Stores user authorization tokens for each OAuth provider for whom the user has approved access. Added for integration functionality.	✓	
USERCALENDARFAVORITE	Stores the list of favorite users that appear in the user calendar.	✓	
USERINTEGRATIONMAP	Maintains a list of users which have authorized with a particular integration.	✓	

New Fields added to Existing Tables

The following lists fields that were added to existing tables in either Saleslogix 8.1 or Infor CRM v8.2.

Table Name	Field Name	Purpose	8.1	8.2
ACTIVITY	APPID	Stores the Foreign key that maps to a sync end point.	✓	
ACTIVITY	ATTENDEECOUNT	For a given activity, shows the number of total attendees. Added for multiple attendees per activity functionality.	✓	

Plugin Changes in this Release

Table Name	Field Name	Purpose	8.1	8.2
ACTIVITY	CHANGEKEY	Stores the GUID representing the unique identifier for the change. This is used in conjunction with the GlobalChangeTracking table.	✓	
ACTIVITY	GLOBALSYNCID	Stores a GUID to uniquely identify an item across different applications.	✓	
ACTIVITY	TICK	Vector clock incrementor for Contract sync.	✓	
APPIDMAPPING	INTEGRATIONID	Foreign key to the Integration table.	✓	
APPIDMAPPING	ISUSERENDPOINT	Flag indicating whether the endpoint is a user endpoint or an application endpoint.	✓	
APPIDMAPPING	OAUTHPROVIDERID	Foreign key to the OAuthProvider table for OAuth authentication.	✓	
APPIDMAPPING	USERID	Foreign key to the user. Required to retrieve user's refresh token for OAuth authentication.	✓	
CONTACT	CHANGEKEY	Guid used to track changes to individual records.	✓	
CONTACT	SLXUSERASSOCIATIONID	Added for multiple attendees per activity functionality, but not currently used.	✓	
CONTACT	WEBPASSWORDRESETTOKEN	The WebPasswordResetToken is a unique id created when a user requests a password reset in the Customer Portal. An email with a link to the reset password page is sent to the user and the token is embedded in the link. When the user attempts to reset their password, the token is read from the link and if it matches the token saved in the database and if the token hasn't expired then the user is allowed to reset their password.		✓
CONTACT	WEBTOKENEXPIRATION	When a WEBPASSWORDRESETTOKEN is created it is only good for a set period of time (which is configurable). This field contains the date/time that the token will expire.		✓
HISTORY	APPID	Stores the Foreign key that maps to a sync end point.	✓	
HISTORY	GLOBALSYNCID	Stores a GUID that uniquely identifies an item across different applications.	✓	
HISTORY	TICK	Vector clock incrementor for Contract sync.	✓	
IMPORTTEMPLATE	ENTITYNAME	The fully qualified interface type name of the entity for which the template is based.		✓
IMPORTTEMPLATE	ISSYSTEMTEMPLATE	Indicates if this is an out-of-the-box template. If True, then the template cannot be modified.		✓
LEAD	APPID	Stores a Foreign key that maps to a sync end point.	✓	
LEAD	CREATESOURCE	Identifies the application that created the record.		
LEAD	GLOBALSYNCID	Stores a GUID that uniquely identifies an item across different applications.	✓	
LEAD	TICK	Vector clock incrementor for Contract sync.	✓	

Plugin Changes in this Release

Table Name	Field Name	Purpose	8.1	8.2
LEAD_ADDRESS	APPID	Foreign Key to the AppldMapping Table. Used to track the endpoint that last modified this record.	✓	
LEAD_ADDRESS	GLOBALSYNCID	A GUID to uniquely identify an item across different applications.	✓	
LEAD_ADDRESS	TICK	A Vector clock incrementor used to track changes.	✓	
PICKLIST	FILTER	An optional value that allows the filtering of picklist items.		✓
PICKLIST	LANGUAGECODE	An optional filter that allows the selection of the pick list items based on the language code value.		✓
QRTZ_FIRED_TRIGGERS	SCHED_TIME	The time the job was scheduled to execute.		✓
SYNCJOB	INTEGRATIONID	Stores a Foreign key to the Integration table.	✓	
SYNCJOB	STATUS	Stores the status of the job. For example, Succeeded, Failed, and so forth.	✓	
SYNCRESULT	ENTITYID	Stores the Foreign key representing the ID of the entity the entry is associated with.	✓	
SYNCRESULT	ENTITYTYPE	Represents the Saleslogix entity type represented with this entry.	✓	
SYNCRESULT	ENTITYVALUE	Represents the ToString value of the entity associated with this entry.	✓	
SYNCRESULT	JOBID	Stores the Foreign key to the SyncJob table.	✓	
SYNCRESULT	SECCODEID	Owner from the Entity the SyncResult represents if one exists. This allows for security to be applied to results across multiple entities.	✓	
SYNCRESULT	SYNCFROMID	Stores the Foreign key to the AppldMapping table representing the endpoint from which this item was sent.	✓	
SYNCRESULT	USERID	Stores the Foreign key to the User table.	✓	
USER_ACTIVITY	APPID	Stores a foreign key that maps to a sync end point.	✓	
USER_ACTIVITY	GLOBALSYNCID	A GUID to uniquely identify an item across different applications.	✓	
USER_ACTIVITY	TICK	A vector clock incrementor used to track changes.	✓	
USERSECURITY	PASSWORDRESETTOKEN	A unique id created when a user requests a password reset. An email with a link to the reset password page is sent to the user and the token is embedded in the link. When the user attempts to reset their password, the token is read from the link and if it matches the token saved in the database and if the token hasn't expired then the user is allowed to reset their password.		✓
USERSECURITY	TOKENEXPIRATIONDATE	Contains the date/time that the token will expire.		✓

Fields Modified on Existing Tables

The following lists existing fields that were modified in either Saleslogix 8.1 or Infor CRM v8.2

Table Name	Field Name	Purpose	8.1	8.2
ACTIVITY	CONTACTNAME			✓
ACTIVITY	DESCRIPTION			✓
HISTORY	CONTACTNAME			✓
HISTORY	DESCRIPTION			✓
LITREQUEST	CONTACTNAME			

New Forms

Form Name	8.1	8.2
system: Manage Targets		✓
System: SLX Crystal Report Viewer	✓	
System: SLX Loading Dialog	✓	
System: SLX MoveContact	✓	
System: SLX Select Printer	✓	

New Groups

Group Name	8.1	8.2
ACO CONTACT : MissingEmailsForCustPort		✓
IMPORTHISTORY : AllImportHistory		✓
INTEGRATION:AllIntegrations	✓	
OAUTHPROVIDER:AllProviders	✓	
SYNCRESULT:AllSyncResults	✓	
SYNCRESULT:Latest Sync Result	✓	
SYNCRESULT:My History	✓	
SYNCRESULT: Today	✓	
USERSECURITY:Integrations	✓	
USERSECURITY: MissingEmails		✓

New Pick Lists

Pick List Name	8.1	8.2
Attendee Role	✓	
Country	✓	
Integration Auth Type	✓	
Integration Link Type	✓	✓
Integration OAuth Version	✓	
Integration Sync Direction	✓	
Integration Sync Method	✓	

New Widgets

Widget Name	8.1	8.2
Dashboard Page System:SData Feed	✓	✓
Dashboard Widget System:Web Feed	✓	
Dashboard Widget System:Website	✓	✓

Changes to Existing Forms

Form Name / Change	8.1	8.2
Lead: Notes-History		✓
Sales Dashboard:Sales Dashboard Detail		✓
System: Account Detail	✓	
System:Add Edit Campaign Stage		✓
System:Add Edit Stage Task		✓
System:Add New Contact Account		✓
System:Add Opportunity Product		✓
System:History Details View	✓	
System:Import Leads		✓
System:Insert Campaign		✓
System:Insert New Ticket		✓
System:Insert Opportunity		✓
System:Manage Targets		✓
System:MoveContact	✓	✓
System:Opportunity Detail		✓
System:Opportunity Statistics		✓
System:Potential Matches		✓

Form Name / Change	8.1	8.2
System: SLX Crystal Report Viewer	✓	
System:SLX Report Manager View	✓	✓
System:Update Multiple Opportunities		✓
System:Update Targets		

Updated Global Scripts

See ["Finding Script Changes" on page 39](#) for more information on finding script changes.

Global Script Name	8.1	8.2
System:Global system		✓
System:Opportunity Management		✓

Updated VB Scripts

See ["Finding Script Changes" on page 39](#) for more information on finding script changes.

VB Script Name	8.1	8.2
Dashboard:Content Set Support		✓
Opportunity:SLX OnOpen Opportunity Statistics Report		✓
System:Attachment Support	✓	
System:Export_Grid_RS_To_Excel		✓
System:Notes History Common	✓	✓
System:SLX_Common		
System:SLX Crystal Report	✓	✓
System:SLX_Export_Group_To_Excel	✓	
System:SLX Lead Mappings		✓
System: SLX Lead Support	✓	✓
System:SLX Report Condition Builder Controller	✓	✓
System:SLX Report Conditions	✓	✓
System:SLX Report Controller	✓	✓

Changes to Existing Groups

Group Name/Change	8.1	8.2
ACO ACCOUNT:PromotedAccounts	✓	
LITREQUEST:All Open	✓	✓
SYNCJOB:AllSyncJobs	✓	

Changes to Existing Menus and Toolbars

Name / Change	8.1	8.2
Menus System:Standard Menus	✓	✓

Changes to Existing Reports

Name / Change	8.1	8.2
Account:Account Address Book - Sample	✓	
Account:Account Detail	✓	
Account:Account Summary - Sample	✓	
Account:Support Account	✓	
Account:Territoryrealign	✓	
Account:Account Phone List - Sample	✓	
Account:Support Account Product List - Sample	✓	
Activities:Literature Fulfillment Details - Sample	✓	
Activities:Literature Fulfillment Summary - Sample	✓	
Activities:Current Activity - Sample	✓	
Contact:Contacts By Account - Sample)	✓	
Contact>Contact Address Book - Sample	✓	
Contact>Contact Detail	✓	
Contact>Contact Phone Book - Sample	✓	
Contact>Contact Summary - Sample	✓	
Contract:Support Expired Contracts - Sample	✓	
Contract:Support Contract	✓	
Defect:Support Defect Activities - Sample	✓	
Defect:Support Defect Items - Sample	✓	
Defect:Support Defect	✓	
History:History by Account - Sample	✓	
History:History by Contact - Sample	✓	
History:History Summary - Sample	✓	

Plugin Changes in this Release

Name / Change	8.1	8.2
History:Support Call History - Sample	✓	
Labels:A4 Avery L7159 - Address	✓	
Labels:A4 Avery L7160 - Address	✓	
Labels:#10 Envelope	✓	
Labels:A4 Avery L7162 - Address	✓	
Labels:A4 Avery L7163 - Address	✓	
Labels:A4 Avery L7664 - 3 1/2" Diskette	✓	
Labels:A4 Avery L7164 - Address	✓	
Labels:Avery 5196 - 3 1/2" Diskette	✓	
Labels:Avery 5160	✓	
Labels:Avery 5161	✓	
Labels:Avery 5162	✓	
Labels:Avery 5163	✓	
Labels:Avery 5164	✓	
Labels:A4 Avery L7166 - Parcel	✓	
Leadsource:Contacts By Lead Source - Sample	✓	
Marketing:Campaign Summary Report		✓
Opportunity:Closed Opportunity By Account		✓
Opportunity:Closed Opportunities Summary		✓
Opportunity:Competitor By Opportunity Status	✓	
Opportunity:Forecast by Account Manager	✓	
Opportunity:Open Opportunities By Account	✓	
Opportunity:Open Opportunities Summary	✓	
Opportunity:Opportunity By Account	✓	
Opportunity:Opportunity Detail	✓	
Opportunity:Opportunity Summary - Sample	✓	
Opportunity:Potential Sales Opportunities - Sample	✓	
Opportunity:Quota Vs Actual Sales	✓	
Opportunity:Sales Process Stage Analysis	✓	
Opportunity:Sales Process Step Usage	✓	
RMA:Support Return Material Authorization	✓	
Sales Order:Sales Order Detail	✓	
Ticket:Support Billable Time Ticket - Sample	✓	
Ticket:Support Call Turn Around - Sample	✓	
Ticket:Support Escalated Tickets - Sample	✓	
Ticket:Support Follow-up - Sample	✓	
Ticket:Support Follow-up Statistics by Assigned - Sample	✓	

Plugin Changes in this Release

Name / Change	8.1	8.2
Ticket:Support Follow-up Statistics by Received - Sample	✓	
Ticket:Support Problem Analysis By Area - Sample	✓	
Ticket:Support Problem Analysis - Sample	✓	
Ticket:Support Ticket	✓	
Ticket:Support Tickets Closed By Assigned - Sample	✓	
Ticket:Support Tickets Closed By Received - Sample	✓	
Ticket:Support Ticket Knowledge Base Summary - Sample	✓	
Ticket:Support Ticket Status By Assigned - Sample	✓	
Ticket:Support Unresolved Tickets - Sample	✓	
Ticket:Support Weekly Recap - Sample	✓	
Ticket:Support Work Order - Sample	✓	

Changes to Existing Widgets

Widget Name	8.1	8.2
Dashboard Page System:My Dashboard	✓	✓
Dashboard Page System:GroupList		✓
Dashboard Page System:SData Feed		✓
Dashboard Page System:Website		✓
Dashboard Widget System:Bar Chart		✓
Dashboard Widget System:Column Chart		✓
Dashboard Widget System:Funnel Chart		✓
Dashboard Widget System:Group List	✓	✓
Dashboard Widget System:Line Chart		✓
Dashboard Widget System:Links		✓
Dashboard Widget System:Pie Chart		✓
Dashboard Widget System>Welcome	✓	✓

Changes to the Database Objects

Creates the following database objects	8.1	8.2
Trigger : MSSQL : ACCOUNT_INT_INSTEAD_INS		✓
Trigger : MSSQL : ACCOUNT_INTEGRATION_CHANGE	✓	✓
Trigger : MSSQL : ACCOUNT_INTEGRATION_CHANGE_A	✓	✓
Trigger : MSSQL : ACCOUNT_INTEGRATION_INSERT	✓	✓
Trigger : MSSQL : ACCOUNT_INTEGRATION_INSERT_A	✓	✓

Plugin Changes in this Release

Creates the following database objects	8.1	8.2
Trigger : MSSQL : ACCOUNT_TOMBSTONE	✓	
Trigger : MSSQL : ACCOUNT_TOMBSTONE_A		✓
Trigger : MSSQL : ACTIVITY_INT_INSTEAD_INS		✓
Trigger : MSSQL : ACTIVITY_INTEGRATION_CHANGE	✓	✓
Trigger : MSSQL : ACTIVITY_INTEGRATION_CHANGE_A		✓
Trigger : MSSQL : ACTIVITY_INTEGRATION_INSERT		✓
Trigger : MSSQL : ACTIVITY_INTEGRATION_INSERT_A		✓
Trigger : MSSQL : ACTIVITYATTENDEE_COUNT	✓	✓
Trigger : MSSQL : ACTIVITYATTENDEE_INTEGRATION_CHANGE		✓
Trigger : MSSQL : ACTIVITYATTENDEE_INT_INSTEAD_INS		✓
Trigger : MSSQL : ACTIVITY_TOMBSTONE	✓	✓
Trigger : MSSQL : ADDRESS_INT_INSTEAD_INS		✓
Trigger : MSSQL : ADDRESS_INTEGRATION_CHANGE	✓	✓
Trigger : MSSQL : ADDRESS_INTEGRATION_INSERT	✓	
Trigger : MSSQL : ADDRESS_INTEGRATION_CHANGE_A	✓	✓
Trigger : MSSQL : ADHOCGROUP_INTEGRATION_INSERT	✓	✓
Trigger : MSSQL : ADHOCGROUP_INTEGRATION_INSERT_A	✓	✓
Trigger : MSSQL : ADHOCGROUP_INTEGRATION_TOMBSTONE	✓	✓
Trigger : MSSQL : ADHOCGROUP_INTEGRATION_TOMBSTONE_A		✓
Trigger : MSSQL : CONTACT_INT_INSTEAD_INS		✓
Trigger : MSSQL : CONTACT_INTEGRATION_CHANGE	✓	✓
Trigger : MSSQL : CONTACT_INTEGRATION_CHANGE_A	✓	✓
Trigger : MSSQL : CONTACT_INTEGRATION_INSERT	✓	✓
Trigger : MSSQL : CONTACT_INTEGRATION_INSERT_A		✓
Trigger : MSSQL : CONTACT_TOMBSTONE	✓	✓
Trigger : MSSQL : CONTACT_TOMBSTONE_A		✓
Trigger : MSSQL : DROPACTIVITYATTENDEECOUNT		✓
Trigger : MSSQL : GLOBALCHANGETRACKING_IDENTITY	✓	
Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGE	✓	✓
Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGE_A	✓	✓
Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS		✓
Trigger : MSSQL : USERACTIVITY_TOMBSTONE	✓	
Trigger : MSSQL : USERACTIVITY_TOMBSTONE_A		✓
Trigger : Oracle : ACCOUNT_BEFORE_CHANGES	✓	
Trigger : Oracle : ACCOUNT_AFTER_CHANGES	✓	
Trigger : Oracle : ACTATTENDEE_AFTER_CHANGES	✓	✓

Plugin Changes in this Release

Creates the following database objects	8.1	8.2
Trigger : Oracle : ACTATTENDEE_AFTER_DELETE	✓	✓
Trigger : Oracle : ACTATTENDEE_AFTER_INSERT	✓	
Trigger : Oracle : ACTATTENDEE_BEFORE_CHANGES	✓	✓
Trigger : Oracle : ACTIVITY_AFTER_CHANGES	✓	✓
Trigger : Oracle : ACTIVITY_AFTER_DELETE	✓	✓
Trigger : Oracle : ACTIVITY_BEFORE_CHANGES	✓	✓
Trigger : Oracle : ACCOUNT_AFTER_DELETE	✓	
Trigger : Oracle : ADDRESS_BEFORE_CHANGES	✓	✓
Trigger : Oracle : ADDRESS_AFTER_CHANGES	✓	✓
Trigger : Oracle : ADHOCGROUP_AFTER_DELETE	✓	✓
Trigger : Oracle : ADHOCGROUP_AFTER_INSERT	✓	✓
Trigger : Oracle : CHANGETRACKING_BEFORE_INS	✓	
Trigger : Oracle : CONTACT_AFTER_CHANGES	✓	✓
Trigger : Oracle : CONTACT_AFTER_DELETE	✓	
Trigger : Oracle : CONTACT_BEFORE_CHANGES	✓	✓
Trigger : Oracle : DROPACTIVITYATTENDEECOUNT		✓
Trigger : Oracle : GLOBALCHANGETRACKING_TICK_SEC	✓	
Trigger : Oracle : USERACTIVITY_BEFORE_CHANGES	✓	✓
Trigger : Oracle : USERACTIVITY_AFTER_CHANGES	✓	✓
Trigger : Oracle : USERACTIVITY_AFTER_DELETE	✓	✓
View : MSSQL : ACCOUNTSYNCSVIEW		✓
View : MSSQL : AcitivityColumnLengthsA		✓
View : MSSQL : AcitivityColumnLengthsU		✓
View : MSSQL : ACTIVITYRESOURCEVIEW	✓	✓
View : MSSQL : ALTER_DBOBJECTDEFINITION		✓
View : MSSQL : ATTENDEECOUNTVIEW		✓
View : MSSQL : CALENDARFAVORITEUSERSVIEW	✓	✓
View : MSSQL : CALENDARHISTORYSYNCSVIEW	✓	
View : MSSQL : CALENDARSYNCSVIEW	✓	✓
View : MSSQL : CAMPAIGNTARGETSVIEW		✓
View : MSSQL : CONTACTSYNCSVIEW	✓	✓
View : MSSQL : DEPARTMENTVIEW		✓
View : MSSQL : DROPINDEX_DBOBJ_OBJ_TYPE		✓
View : MSSQL : DROPINDEX_GCT_CHANGETYPE		
View : MSSQL : DROPINDEX_GCT_COMPOSITEKEY		
View : MSSQL : ERPEMAILADDRESS_KEYGEN_FIX		✓
View : MSSQL : ERPPHONENUMBER_KEYGEN_FIX		✓

Plugin Changes in this Release

Creates the following database objects	8.1	8.2
View : MSSQL : GROUPRELEASEVIEW		✓
View : MSSQL : GROUPRELEASEVIEW_SECTABLEDEFS_UPDATE		✓
View : MSSQL : GROUPSTATSVIEW		✓
View : MSSQL : GROUPSTATSVIEW_UPDATE		✓
View : MSSQL : HISTORYVIEW		✓
View : MSSQL : HistoryColumnLengthsA		✓
View : MSSQL : HistoryColumnLengthsU		✓
View : MSSQL : INDEX_PK_APPIDMAPPING		✓
View : MSSQL : INDEX_COUNTRYCODEMAPPING_PRIMARY		✓
View : MSSQL : INDEX_SLXPRICELIST_PRIMARY		✓
View : MSSQL : LitRequestContactNameSizeA		✓
View : MSSQL : LitRequestContactNameSizeU		✓
View : MSSQL : LEADSYNCVIEW	✓	
View : MSSQL : ORMCOLUMN		✓
View : MSSQL : ORMKEYCOLUMN		✓
View : MSSQL : ORMTABLE		✓
View : MSSQL : OWNERVIEW		✓
View : MSSQL : PACKAGEKITCHILDVIEW		✓
View : MSSQL : PRODPACKAGEKITVIEW		✓
View : MSSQL : PICKLISTITEMVIEW		✓
View : MSSQL : PICKLISTVIEW		✓
View : MSSQL : SALESORDERSYNCVIEW		✓
View : MSSQL : SALESQUOTATIONSYNCVIEW		✓
View : MSSQL : SLX_PLUGINNOBLOB		✓
View : MSSQL : SLX_RELEASEDPLUGINS		✓
View : MSSQL : SYNCSTATUS	✓	✓
View : MSSQL : TASKSYNCVIEW	✓	✓
View : MSSQL : TEAMVIEW		✓
View : MSSQL : USERINTEGRATIONSVIEW		✓
View : MSSQL : WebPasswordLengthU		✓
View : MSSQL : WebPasswordLengthA		✓
View : ORACLE : AcitivityColumnLengths		✓
View : ORACLE : ALTER_DBOBJECTDEFINITION		✓
View : ORACLE : ATTENDEECOUNTVIEW		✓
View : ORACLE : CALENDARFAVORITEUSERSVIEW		✓
View : ORACLE : CONTACTSYNCVIEW		✓
View : ORACLE : GROUPRELEASEVIEW		✓

Plugin Changes in this Release

Creates the following database objects	8.1	8.2
View : ORACLE : GROUPRELEASEVIEW_SECTABLEDEFS_UPDATE		✓
View : ORACLE: GROUPSTATSVIEW		✓
View : ORACLE: GROUPSTATSVIEW_UPDATE		✓
View : ORACLE: HISTORYVIEW		✓
View : ORACLE: HistoryColumnLengths		✓
View : ORACLE: LitRequestContactNameSize		✓
View : ORACLE : ORMCOLUMN		✓
View : ORACLE: SYNCSTATUS		✓
View : ORACLE: USERINTEGRATIONSVIEW		✓
View : ORACLE : WebPasswordLengthS		✓