



# Infor CRM v8.4 Release Notes

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# Chapter 1

## Upgrade workplan



This document provides instructions for upgrading existing installations from Infor CRM version 8.3 or later to version 8.4.

Version 8.4 will uninstall earlier versions of Infor CRM before installing version 8.4.

- If you are upgrading from Infor CRM version 8.3 or later, follow the steps in this guide.
- If you have never installed a version of 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 of Infor CRM or Saleslogix prior to version 8.3, you must first upgrade to version 8.3 or later before upgrading to version 8.4. Use the upgrade instructions in the appropriate upgrade documents on the support portal web site: [Infor.com/inforxtreme](http://Infor.com/inforxtreme).



DO NOT install this release on any Infor CRM version earlier than 8.3.

## What's new in this release

For 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.

1. For compatibility information for Infor CRM v8.4, see the Infor Online Compatibility Matrix (OCM) available on Infor Xtreme.
2. Sign in to the InforXtreme Portal web site: [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme). Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
3. (Optional) Click **Help** for a video explaining the features of the OCM.



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 4.5.1	X		X	X	X	
Microsoft Exception Message Box	X		X	X		

Prerequisites	Admin Tools and Servers	LAN Client	Remote Office	Remote Client	Offline Web Client	Web Host
Microsoft.NET Framework 4.5.2 <sup>1</sup>	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) <sup>2</sup>	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X
Microsoft Visual C++ 2013 <sup>3</sup> Redistributable Package	X					
Microsoft Visual C++ 2012 Update 4 Redistributable Package			X			



- <sup>1</sup> Microsoft.NET Framework v4.5.2 is installed in Integrated model.
- <sup>2</sup> 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.
- <sup>3</sup>Microsoft Visual C++ 2013 Redistributable Package available also available from <https://www.microsoft.com/enus/download/details.aspx?id=40784> (required for CreateUnicodeDB.exe.)

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.
- **Customized** - installations that have customized their Infor CRM environment.
- **Microsoft SQL Server** - installations running Infor CRM on a Microsoft SQL Server database.
- **Mobile** - installations that include the Mobile client.
- **Network** - installations that include Network components.
- **Oracle** - installations running Infor CRM on an Oracle database.
- **Remotes** - installations that include Remote users, Offline Client users, or Remote Offices.
- **Web** - installations that include Web components.
- **Infor CRM Xbar for Microsoft Outlook** - installations that will use Infor CRM Xbar, which includes Outlook Integration.
- **Infor CRM Back Office Extension** - Installations that are integrated with a supported ERP system using the Back Office Extension features..



- In Infor CRM v8.4 Infor CRM Back Office Extension (ICBOE) is part of the core product. If your installation included an earlier version of ICBOE, updated functionality will be applied as part of the core product upgrade.



- Sync for Exchange 1.0 and Sync for Gmail 1.2 are not compatible with Infor CRM 8.4 or later.
- Outlook Integration functionality is delivered with Infor CRM Xbar. The Infor CRM Xbar v1.3.7 installation is provided on the 8.4 media.

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## Preparing to upgrade

You are instructed to build and deploy your Web site at the end of multiple tasks during this upgrade. While experienced installers may choose to ignore this instruction and build and deploy only once, incremental builds are strongly recommended as they help with troubleshooting in the event that the Infor CRM Web Client does not deploy as expected.

Infor CRM is highly customizable. While every effort is made to identify breaking changes, validating your customizations after upgrading is strongly recommended.

Required for	Task Description
	<p><b>1</b> 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"> <li>• Chapter 1, “Upgrade Workplan” - contains upgrade tasks explaining how to:               <ul style="list-style-type: none"> <li>• Save your existing customizations</li> <li>• Prepare your database</li> <li>• Upgrade the core Infor CRM components</li> <li>• Convert ANSI database to Unicode</li> <li>• Re-apply customizations to your upgraded installation</li> <li>• Cut new remote databases</li> <li>• Install Infor CRM Xbar for Microsoft Outlook</li> <li>• Upgrade your clients (Web, Mobile, Network, Offline, Remote)</li> <li>• Enable new features added in version 8.4</li> <li>• Upgrade Back Office Extension.</li> <li>• Upgrade existing integrations such as with Configure Price Quote (CPQ)</li> </ul> </li> <li>• 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 <a href="#">[Breaking Change]</a>.</li> <li>• Chapter 3, “Plugin changes in this release” - details the schema and plugin changes in this release.</li> </ul> <p><b>Before upgrading, ensure that:</b></p> <ul style="list-style-type: none"> <li>• Your current Infor CRM version is 8.3 or later and Web portals included in your installation are version 8.3 or later and have deployed successfully.</li> <li>• You review the Online Compatibility Matrix (OCM) to understand the supported platforms and applications for this release.</li> </ul>
All	<p><b>2</b> Install this release in a test environment before installing on your production database. 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: <a href="http://Infor.com/inforxtreme">Infor.com/inforxtreme</a> for more information. Search for “How to set up an Infor CRM test environment” for information on using a copy of your production database in a test environment.</p> <p><b>Note</b> Make sure you change your logging paths in the Administrator to access the test environment or errors will occur.</p>
All	<p><b>3</b> 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>

Required for	Task Description
All	<p><b>4</b> 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><b>To run utility:</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Upgrades &gt; FindProducts</b> folder, double-click the <b>FindInforCRMProducts.exe</b>.</li> <li>2 In the <b>Infor CRM Component Finder</b> window, click the <b>Find Infor CRM Products</b> button.</li> </ol>
Web	<p><b>5</b> 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>

## Protecting your customizations

Complete these tasks if your existing environment includes customizations to the Windows, Web, and/or Mobile clients. If your existing environment does not include any customizations, proceed to task number [16](#).

Required for	Task Description
Customized Network and Customized Web	<p><b>6</b> Back up all custom assemblies to protect any changes. Custom assemblies may be overwritten or deleted during the installation.</p>
Customized Web	<p><b>7</b> 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 <a href="#">46</a> to apply the changes after the upgrade.</p>
Customized Web	<p><b>8</b> Document any customizations made to Dashboards.</p> <p><b>Important</b> Any custom Dashboards will need to be recreated after the upgrade. You will recreate the custom Dashboards in task number <a href="#">48</a>.</p>
Customized Web	<p><b>9</b> Document any help file customizations you may have created. Create a bundle of your customized Web Client help (and Customer Portal help, if necessary) and save it as a folder on your local system. Failure to save these changes will cause them to be lost during the upgrade process. Online help must now be accessed from Infor's Docs.infor.com site, Infor CRM help bundles for installation at your local site are no longer provided.</p>

Required for	Task Description
<b>Customized Web Without Updates</b>	<p><b>10</b> Prepare to create a bundle of your Web customizations.</p> <p><b>Note</b> If you have not customized your Web implementation, disregard this task. If you customized your Web implementation and have Updates installed, proceed to task number <a href="#">11</a>.</p> <p>Infor CRM provides project backups that you can use to compare to your current database. You can then create a bundle from the differences.</p> <p><b>To prepare</b></p> <ol style="list-style-type: none"> <li>1 Locate the <b>ICRM v8.3.0 Unicode Project_Backup.zip</b>. The project backup files are included in the Upgrades folder in the media / download files.</li> <li>2 Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible. There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).</li> <li>3 In the Application Architect Project Explorer, open your current project.</li> <li>4 If necessary, open the Output Window to display progress when creating your customization bundle.</li> </ol> <p><b>Note</b> 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> <ol style="list-style-type: none"> <li>5 Proceed to task number <a href="#">11</a>.</li> </ol>

Required for	Task Description
Customized Web with Updates	<p><b>11</b> Identify customized forms on your system and create a bundle of your Web customizations. Create a new project workspace and add the Updates currently installed on your system.</p> <p><b>Note</b> If you have not customized your Web implementation or already have an accurate record of your customizations, disregard this task and proceed to task number <a href="#">15</a>. If you customized your Web implementation, but do not have any Updates installed, go back to task number <a href="#">10</a>.</p> <p>To determine if an Update has been installed, view your system bundles:</p> <ul style="list-style-type: none"> <li>• For network bundles, open the <b>Administrator</b>, and then click <b>Bundles</b>.</li> <li>• For Web bundles, open the <b>Application Architect</b>, open <b>Project Explorer</b>, expand the <b>VFS project workspace</b>, and then expand <b>Bundle Model</b>.</li> </ul> <p>After creating a new project workspace, restore the project backup into the workspace, and apply your Updates.</p> <p><b>To create a new project workspace</b></p> <ol style="list-style-type: none"> <li>1 Create a new project workspace.       <ol style="list-style-type: none"> <li>a On the Application Architect <b>View</b> menu, click <b>Project Workspace Manager</b>.</li> <li>b Right-click in the <b>Project Workspaces</b> window, and then click <b>Add</b>.</li> <li>c In the <b>Name</b> box, type a name for the project workspace.</li> <li>d In the <b>Working Path</b> 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.</li> <li>e In the <b>Description</b> box, type a description or additional information about the new project.</li> <li>f Ensure the <b>Export Files Upon Creation</b> check box is not selected.</li> <li>g Click <b>Create</b>.</li> <li>h Restore the <b>ICRM v8.3.0 Unicode Project_Backup.zip</b>. The project backup files are included in the service pack download files.</li> <li>i Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible.</li> <li>j In the Application Architect Project Explorer, open the project workspace you created in step 1, right-click the project, and then click <b>Restore Project</b>.</li> <li>k In the <b>Select Project Backup File to Restore From</b> dialog box, browse to the project backup on your local machine (step b).</li> <li>l Apply all Web Updates currently installed in your production environment to the new project.</li> </ol> </li> </ol>

Required for	Task Description
Customized Web	<p><b>12</b> Create a bundle of your Web customizations.</p> <p><b>Note</b> If you have not customized your Web implementation, disregard this task and proceed to task number <a href="#">16</a>.</p> <p><b>To create</b></p> <ol style="list-style-type: none"> <li>1 In Application Architect, open Project Explorer.</li> <li>2 Right-click <b>Bundle Model</b>, and then click <b>Create Manifest by Project Differences</b>. The Select a Project to Compare Against dialog box opens.</li> <li>3 Choose one of the following: <ul style="list-style-type: none"> <li>• If your custom installation does not include Updates, select <b>Project Backup</b> and browse to the project backup you created in task number <a href="#">10</a></li> <li>• If your custom installation includes Updates, select <b>Existing Project</b>, and then select the project you created in task number <a href="#">11</a>.</li> </ul> </li> <li>4 Clear the <b>Include deleted items that were added to the current project</b> 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.</li> <li>5 Click <b>OK</b>. The new manifest opens in the Application Architect.</li> <li>6 On the New Manifest <b>Properties</b> tab, type a name in the <b>Name</b> box. For example, Customizations.</li> <li>7 Save the manifest.</li> <li>8 Expand <b>Bundle Model</b>, right-click the new manifest, and then click <b>Create Bundle</b>.</li> <li>9 In the <b>Save Bundle</b> dialog box, browse to the location where you want to save the bundle, type a name, and then click <b>Save</b>. You will use this bundle in task number .</li> </ol> <p><b>Note</b> 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>
Customized Infor CRM Mobile	<p><b>13</b> Save any customizations made to <b>Infor CRM Mobile</b>.</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>
Customized Network	<p><b>14</b> 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><b>Note</b> Infor CRM does not overwrite your customized plugins. However, this bundle can be used as a backup of your customizations.</p> <p><b>Note</b> 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><b>15</b> 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>

## Preparing your Infor CRM database

These tasks are required to prepare your database for a successful upgrade

Required for	Task Description
Microsoft SQL Server	<p><b>16</b> 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. <b>Note</b> Merge and Snapshot Replication are not compatible with Infor CRM.</p>
All	<p><b>17</b> Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in the Administrator. <b>Note</b> See the “Integrity Checker” topic in the Administrator Help for instructions.  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><b>18</b> Make sure all users have signed off from Infor CRM.</p>
Remotes	<p><b>19</b> Instruct all Remote users and Offices to run a final synchronization cycle. <b>Note</b> Once the Main office is upgraded, you must cut new remote databases and distribute them to remote users, including remote offices.</p>
Remotes	<p><b>20</b> Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.</p>
Remotes	<p><b>21</b> Stop the Sync Service(s). If using a third-party scheduling package, deactivate the Synchronization Server tasks.</p>
All	<p><b>22</b> Close all Infor CRM applications and stop all applications and services that access the Infor CRM database using the Infor CRM OLE DB Provider. Having services running during installation can impede the installation process and generate errors.</p>
All	<p><b>23</b> 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.</p>

## Upgrading your core components

These tasks detail upgrading your Application Architect, Administrator, Architect, and Web Host, as well as installing necessary bundles and building and deploying required portals.

Required for	Task Description
<p><b>This task is required if you are upgrading a LAN only environment and use Infor CRM (SLX) Address Book with Microsoft Office.</b></p>	<p><b>24</b> 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 v8.4. Refer to Chapter 5 Installing the Web Components in the <i>Infor CRM Implementation Guide</i> for instructions.</p>
<p><b>Infor Xbar and Outlook Sync</b></p>	<p><b>25</b> Installing Infor Xbar and Outlook Sync</p> <p>If your implementation is LAN only, and you will be adding Infor CRM Xbar for Microsoft Outlook to your implementation, you must deploy a SData portal.</p> <p>If your installation is:</p> <ul style="list-style-type: none"> <li>• <b>Windows Network Client</b> only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals.</li> <li>• <b>Windows Remote Client</b>: no extra actions required. The SData portal is deployed as part of the LAN Remote Client install.</li> </ul>
<p><b>All</b></p>	<p><b>26</b> 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><b>Note</b> 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><b>Important:</b></p> <ul style="list-style-type: none"> <li>• The Job Service is required for Web Client functionality.</li> <li>• If your installation is LAN-only and has been using the SLX Address Book (now rebranded to Infor CRM Address Book) and related features in Microsoft Outlook, see task number <a href="#">24</a>.</li> <li>• If your installation includes Remote users or Remote Offices, you must upgrade your Synchronization Server(s). <ul style="list-style-type: none"> <li>• If your implementation includes Outlook Sync, read task number 25 before proceeding with this task.</li> </ul> </li> </ul>

Required for	Task Description
All	<p><b>Task 26 - continued</b></p> <p><b>To upgrade</b></p> <ol style="list-style-type: none"> <li>1 Infor CRM media&gt; <b>Server Installation &gt; Required Administrative Tools and Servers.</b></li> <li>2 If the Open File - Security Warning dialog appears, click <b>Run</b>.</li> <li>3 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"> <li>• Click <b>Next</b> to continue with the installation.</li> <li>• Click <b>Cancel</b> to exit the Administrative Tools and Servers installation.</li> </ul> </li> <li>4 For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. If a message box offering to install an optional prerequisite (such as Microsoft SQL Server 2012 Express SP1) opens, do one of the following: <ul style="list-style-type: none"> <li>• Click <b>Yes</b> to install the referenced software.</li> <li>• Click <b>No</b> to cancel installation of the prerequisite, but continue to install Infor CRM.</li> </ul> </li> <li>5 On the <b>Welcome</b> screen, click <b>Next</b>.</li> <li>6 On the <b>Setup Type</b> screen, select an installation type. <ul style="list-style-type: none"> <li>• Select <b>Complete</b> to install all program features and the Microsoft SQL Server databases. 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.</li> <li>• Select <b>Custom</b> to install only certain components or to change the installation location. Use the <b>Custom Setup</b> screen to enable or disable items for installation. <ul style="list-style-type: none"> <li>• <b>Saleslogix Server</b> - installs the components that primarily handle logging and licensing for Infor CRM. This is required for all installations.</li> <li>• <b>Administrator</b> - installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses.</li> <li>• <b>Architect</b> - installs the component used to customize the Infor CRM Client.</li> <li>• <b>Application Architect</b> - required to configure and customize the Infor CRM Web components and portals.</li> <li>• <b>Job Service</b> - 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> <li>• <b>Messaging Server</b> - enables communication between Infor CRM service components. This is required for all installations.</li> <li>• <b>Cache Server</b> - 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> <li>• <b>SpeedSearch Server</b> - installs the SpeedSearch Service.</li> </ul> </li> </ul> </li> </ol>

Required for	Task Description
All	<p><b>Task 26 - continued</b></p> <ul style="list-style-type: none"> <li>• <b>Synchronization Server</b> - required if your installation will include remote users or a remote office.</li> <li>• <b>.NET Extensions</b> - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework.</li> <li>• <b>Utilities</b> - multiple applications to aid with customization and database maintenance.</li> </ul> <p>7 Click <b>Next</b>.</p> <p>8 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>• <b>SQL Server sa password</b> - 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> <li>• <b>SQL Server sysdba password</b> - 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> <li>• <b>Use Local System Account</b> - 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> <li>• <b>Domain</b> - Type the network domain where you created the Infor Service user.</li> <li>• <b>User Name</b> - Type the name of the Infor Service user (for example, SLXService).</li> <li>• <b>Password</b> and <b>Confirm</b> - Type the Infor Service user's password.</li> <li>• Port <b>Change</b> 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.</li> </ul> <p>9 On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation.  <b>Note</b> 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 <b>OK</b> to continue the installation.</p> <p>10 If prompted, restart your computer when the installation completes.</p>

Required for	Task Description
All Web	<p><b>27</b> Upgrade the Web Host.</p> <p><b>Note</b> To upgrade the Cache Server, see task <a href="#">26: Upgrade the Admin Tools and Servers installation</a>.</p> <p><b>To upgrade</b></p> <ol style="list-style-type: none"> <li>1 You must log on as the local administrator to install the Web components on each machine.</li> <li>2 On the <b>Infor CRM Installation</b> screen, click <b>Server Installation</b>.</li> <li>3 On the <b>Server Installation</b> screen, click <b>Web Host on IIS</b>.</li> </ol> <p><b>Note</b> 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"> <li>• Click <b>Install</b> to allow Infor CRM to install the required components.</li> <li>• Click <b>Cancel</b> to stop the installation.</li> </ul> <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"> <li>4 In the <b>Infor CRM Web Host</b> message box, click <b>Yes</b>.</li> <li>5 On the <b>Welcome</b> screen, click <b>Next</b>.</li> <li>6 On the <b>Setup Type</b> screen, select an installation type, and then click <b>Next</b>. <ul style="list-style-type: none"> <li>• Select <b>Complete</b> to install the Web Host.</li> <li>• Select <b>Custom</b> to install only certain components or to change the installation location. Use the <b>Custom Setup</b> screen to enable or disable items for installation.</li> </ul> </li> <li>7 If you installed the 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.</li> <li>8 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"> <li>• <b>Use an existing web site</b> - 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.</li> <li>• <b>Create Web Site</b> – 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.</li> <li>• <b>Enter a Web site name</b> – Type the name of the Web site that will appear in IIS. The default name is Infor CRM.</li> <li>• <b>Port</b> – 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.</li> <li>• <b>Domain</b> – Enter the network domain where you created the WebDLL user.</li> <li>• <b>User Account</b> – 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.</li> <li>• <b>Password</b> and <b>Confirm Password</b> – Type the WebDLL user’s password.</li> </ul> </li> </ol>

Required for	Task Description
All Web	<p><b>Task 27 - continued</b></p> <ul style="list-style-type: none"> <li>• <b>Configure Saleslogix Database</b> - 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.</li> <li>• <b>Saleslogix Server</b> – Select or type the name of the computer on which you installed the Saleslogix Server.</li> <li>• <b>Saleslogix Database Alias</b> – Select or enter the name of the connection to the Infor CRM database.</li> <li>• <b>Search for servers on port</b> - Enter a port. By default, this is set to port number 1706.</li> <li>• <b>User Name</b> – Enter a Infor CRM user name (such as Admin).</li> <li>• <b>Password</b> – Enter the Saleslogix Server password for the Infor CRM user.</li> </ul> <p>9 On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation.  <b>Note</b> 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>10 If prompted, restart your computer when the installation completes.</p>
All	<p><b>28</b> (Optional) If the Infor CRM Network Client is installed on your Administrative Workstation, run the Network Client installation to install the Client application.</p> <p><b>To upgrade</b></p> <ol style="list-style-type: none"> <li>1 Infor CRM Installation browser &gt; <b>Client Installations</b>&gt; <b>Install Network Client</b>.  <b>Note</b> 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.</li> <li>2 In the <b>Infor CRM Network Client</b> message box, click <b>Yes</b>.</li> <li>3 On the <b>Welcome</b> screen, click <b>Next</b>.</li> <li>4 On the <b>Setup Type</b> screen, select an installation type, and then click <b>Next</b>. <ul style="list-style-type: none"> <li>• Click <b>Complete</b> to install the most common components.</li> <li>• Click <b>Custom</b> to install only certain components or to change the installation location. Use the <b>Custom Setup</b> screen to enable or disable items for installation.</li> </ul> </li> <li>5 On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation.  <b>Note</b> 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.</li> <li>6 If prompted, restart your computer when the installation completes.</li> </ol>

Required for	Task Description
All	<p><b>29</b> Run the CreateUnicodeDB.exe.</p> <p>The CreateUnicodeDB.exe tool enables converting an ANSI database to a Unicode database. The converted database will be approximately double the size of the existing database and the tool requires three times the size of the existing database to be able to run correctly.</p> <p>When running the conversion, piping the log information to a file is strongly recommended. If you do so, conversion progress is logged in the file instead of displaying in the command window.</p> <p><b>Command line usage</b></p> <p>CreateUnicodeDB.exe server=value db=value newdb=value user=value password=value</p> <p><b>CreateUnicodeDB.exe Parameters</b></p> <p><b>db</b> - (required). The name of the database to convert, for example, "saleslogix_eval"</p> <p><b>server</b> - (optional). The name of the SQL server instance, for example, "MyMachine\SQLEXPRESS". If not specified, local machine is assumed</p> <p><b>newdb</b> - (optional). The name of the new Unicode database. If not specified, the new database name will be the same as the old database with "_Unicode" appended. For example, "saleslogix_eval_Unicode".</p> <p><b>filename</b> - (optional). The file name of the new Unicode database. If no name is specified, the new database will be created in the same folder as the source data base and the file name will be the new database name.</p> <p><b>user</b> - (optional). SQL user name. If no user name is specified, the connection will be performed using the credentials of the logged-in Windows user. This is used when if the SQL Server is on a different machine from the machine hosting Admin Tools and Servers.</p> <p><b>password</b> - (optional). SQL user password. Used only if the "user" parameter is specified. This is used when the SQL Server is on a different machine from the machine hosting Admin Tools and Servers.</p> <p><b>collation</b> - (optional). Collation of the new DB (e.g. Chinese_PRC_CI_AS) If not specified, the collation of the source DB is used.</p> <p>The following procedural steps provide an example of converting an existing database to a new database on the same SQL Server:</p> <ol style="list-style-type: none"> <li>1 In Microsoft Windows, open a Command Prompt as admin.</li> <li>2 At the prompt, navigate to the CreateUnicodeDB folder by typing <b>cd C:\Program Files (x86)\Saleslogix\CreateUnicodeDB</b>.</li> <li>3 At the prompt, type the command using the appropriate parameters for your implementation and press <b>Enter</b>.</li> </ol> <p>Example: CreateUnicodeDB.exe server=servername\InstanceName db=Current DB Name newdb=New DB Name &gt; CreateDBLog.txt</p> <p>The above CreateDB Logfile is created in the C:\Program Files (x86)\SalesLogix\CreateUnicodeDB Directory</p> <p>Your new database should be successfully created on the SQL Server.</p> <p><b>Note</b> Do not close the Command Prompt until the program is fully executed because doing so will cancel the execution.</p> <p>For more information, see the Microsoft documentation: <a href="https://technet.microsoft.com/en-us/library/bb490982.aspx">https://technet.microsoft.com/en-us/library/bb490982.aspx</a></p>

Required for	Task Description
All	<b>30</b> Start the Administrator.
All	<b>31</b> Use the Administrator to apply the Saleslogix v8.3x to v8.4 Upgrade.sxb bundle. See the “Installing a Bundle” topic in the Administrator Help for instructions. This bundle is located in the Infor CRM media, in the Upgrades folder and includes functionality formerly released in Updates. The bundle contents are outlined in Chapter 3, “Plugin changes in this release”.
All	<b>32</b> Open the Application Architect and update existing projects. All existing projects that you open in the Application Architect must be updated to the new v8.4 structure. This only changes the format of the project.xml file and some of the XML components. You must still restore the ICRM v8.4.0 Unicode Project_Backup.zip in task number 33. When opening a project created prior to version 8.4, you may be prompted to update the project format. <b>To update</b> <ol style="list-style-type: none"> <li>1 Open the Application Architect.</li> <li>2 The Application Architect automatically opens the last project you were working with and the <b>Confirm Upgrade</b> dialog box opens.</li> <li>3 Do one of the following:               <ul style="list-style-type: none"> <li>• If you want to update the format of this project, click <b>Yes</b>.</li> <li>• If you do not want to update the format of this project, and you want to choose a different project, click <b>No</b> and then open the project you want to update.</li> </ul> </li> <li>4 After updating the project, information about the update can be found in the Output Window.</li> </ol>

Required for	Task Description
All Web	<p><b>33</b> Restore the ICRM v8.4.0 project backup to the virtual file system (VFS ) workspace.</p> <p>Infor CRM provides a project backup file that contains all changes for this release. You must add these changes to upgrade your installation. When upgrading with project backups, you do not need to apply 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 <b>MUST</b> 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><b>To restore</b></p> <ol style="list-style-type: none"> <li>1 Locate the <b>ICRM v8.4.0 Project.Backup.zip</b> file. Project backups are located in the Upgrades\Project Backups folder. <b>Note</b> Additional project backups are available for use when creating a customization bundle. Use the ICRM v8.4.0 Unicode Project_Backup.zip file to receive all changes in this release. Disregard all other project backups when completing this task.</li> <li>2 Copy the zip file to a local folder on the Application Architect computer. Ensure the folder path is as short as possible.</li> <li>3 Open the <b>Application Architect</b>.</li> <li>4 In the Project Workspaces window, select the VFS project workspace.</li> <li>5 Right-click the project, and then click <b>Restore Project</b>.</li> <li>6 Select the <b>Rebuild Schema from Project</b> check box.</li> <li>7 In the <b>Select Project Backup File to Restore From</b> dialog box, browse to the location where you saved the <b>ICRM v8.4.0 Project.Backup.zip</b> on your local machine (step 2).</li> <li>8 Click <b>OK</b>.</li> </ol>
All	<p><b>34</b> Install the ICRM v8.4 VFS Actions .zip.</p> <p><b>To install the bundle</b></p> <ol style="list-style-type: none"> <li>1 Browse the Infor CRM media, expand the <b>Upgrades</b> folder, expand the <b>Product Backups</b> folder, and then copy the <b>ICRM v8.4 VFS Actions .zip</b> to a convenient location.</li> <li>2 Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.</li> <li>3 In the <b>Application Architect</b>, in the <b>Project Explorer</b>, right-click the project, and then click <b>Install Bundle</b>.</li> <li>4 Navigate to the folder where you copied the ICRM v8.4 VFS Actions .zip, and then click <b>Open</b>.</li> <li>5 On the <b>Select Bundle</b> screen, click <b>Next</b>.</li> <li>6 On the <b>Select Items</b> screen, ensure the <b>Portals</b> option is selected.</li> <li>7 Click <b>Next</b>, and then click <b>Finish</b>.</li> </ol>

Required for	Task Description
All	<p><b>35</b> Run the Infor CRM v8.4 Conversion Utility</p> <p><b>Note</b> Unless otherwise noted, each Conversion Utility process should be executed only once.</p> <p>This utility provides the following important actions:</p> <ul style="list-style-type: none"> <li>• <b>Create opportunity pretty key</b> This will assign the new AlternateKeyPrefix and AlternateKeySuffix properties added to Opportunity. The values assigned are based on existing pretty key formatting.</li> <li>• <b>Convert opportunity document pricing properties</b> This will assign the new document pricing properties as follows: <ul style="list-style-type: none"> <li>• Opportunity.DocSalesPotential = SalesPotential * ExchangeRate</li> <li>• Opportunity.DocActualAmount = ActualAmount * ExchangeRate</li> <li>• Opportunity_Product.DocCalculatedPrice = CalcPrice * ExchangeRate</li> <li>• Opportunity_Product.DocExtendedPrice = ExtendedPrice * ExchangeRate</li> </ul> </li> <li>• <b>Create account and contact pretty key</b> This will assign the new AlternateKeyPrefix and AlternateKeySuffix properties added to Accounts and Contacts. The values assigned are based on existing pretty key formatting.</li> <li>• <b>Convert Proximity Search to Contour</b> For implementations that included Proximity Search only. In update 04 for Infor CRM version 8.3, Proximity Search was replaced with Contour. Proximity Search is a third-party tool that provides functionality similar to that provided by Contour. It was available for both LAN and Web. Selecting this option to convert copies the data from tables and fields used by Proximity Search into tables and fields used by Contour. After the conversion, you may still be able to use Proximity Search on the LAN, however this is not a supported scenario and Proximity Search and Contour will not exchange data. <b>Note</b> Additional steps are required to upgrade from Proximity Search to Contour. These steps are available in KB 1867584 which can be accessed from the Infor Xtreme Support portal at <a href="http://www.infor.com/inforxtreme">www.infor.com/inforxtreme</a>.</li> <li>• <b>Move CPQ Rulesets to Product CPQ Tab</b> This option is required for implementations with Infor Configure Price Quote (CPQ). This will move the new Product Ruleset from the configuration tab to the Product detail view CPQ Details tab.</li> <li>• <b>Create default favorite groups</b> The Group Favorites feature was added to limit the number of groups that display as tabs in the list and detail views. This designates standard Infor CRM groups and any groups that are used as default group layout or Lookup results groups as Favorite groups. <b>Note</b> Do not select this option if it was already run during a previous update. Running it again will reset all non-standard groups to not be Favorites.</li> <li>• <b>Perform BOD mapping migration</b> This option is only for implementations with Back Office Extension that include customized BOD pack records. Selecting this option is required to migrate BOD pack records customized in Infor CRM version 8.3 and later and cloned mappings from version 8.2 that have been upgraded to version 8.3 to be compatible with Infor CRM version 8.3.0.07 and later. <b>Note</b> Do not select this option if it was already run during a previous update.</li> </ul>

Required for	Task Description
	<p><b>Task 35 - continued</b></p> <ul style="list-style-type: none"> <li>• <b>Migrate Secured Actions</b> New secured actions were implemented for menu bar and navigation bar items. This will add the following new secured actions to all user roles, except the Contour role which is explicitly used for Contour functionality: <ul style="list-style-type: none"> <li>• Navigation/Sales/View</li> <li>• Navigation/Marketing/View</li> <li>• Navigation/Service/View</li> <li>• Navigation/Support/View</li> <li>• Navigation/Administration/View</li> <li>• Navigation/Integration/View</li> <li>• Toolbar/New/View</li> <li>• Toolbar/Schedule/View</li> <li>• Toolbar/Tools/View</li> <li>• Toolbar/Administration/View</li> <li>• Toolbar/Tools/LiteratureRequestManagement/View</li> <li>• Toolbar/Tools/ImportHistory/View</li> <li>• Toolbar/Tools/Options/View</li> <li>• Toolbar/Tools/AdvancedSpeedsearch/View</li> </ul> </li> <li>• <b>Master Data Consolidation</b> This option is for Infor CRM implementations integrated with ERP-M3, ERP-LX, or ERP-Visual. This non-reversible option consolidates duplicate records into a single consolidated record based on the unique external ID as published in the host ERP system. The consolidation logic supports Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Products, and Person. Related information, such as activities, history, attachments, quotes, sales orders, invoices, shipments, returns and receivables are moved to the new consolidated Account or Bill To, or Ship To, or Contact.  Implementations with Master Data Consolidation enabled prior to Infor CRM v8.4 need to execute the Conversion Utility, Master Data Consolidation logic to consolidate pre-existing ERPPerson records.  <b>Note</b> Unless otherwise noted, do not run items that were converted in earlier installations again.</li> </ul>

Required for	Task Description
	<p><b>Task 35 - continued</b></p> <p><b>To run</b></p> <ol style="list-style-type: none"> <li>1 On the Administrative Workstation, browse to the <b>ConversionUtility_8.4.exe</b> and <b>ConversionUtility_8.4.exe.config</b> files. By default, these are in . . \Program Files\Saleslogix.</li> <li>2 Open the <b>ConversionUtility_8.4.exe.config</b> using the text editor of your choice.</li> <li>3 Scroll to the &lt;connectionStrings&gt; section and change the Initial Catalog value from SALESLOGIX_EVAL to your Saleslogix Connection Manager name. For example:  <pre>&lt;connectionStrings&gt; &lt;clear/&gt; &lt;add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabaseAlias;Data Source=localhost;Extended Properties=&amp;quot;PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE&amp;quot;"/&gt; &lt;/connectionStrings&gt; ACTIVITYSECURITY=OFF;TIMEZONE=NONE&amp;quot;"/&gt; &lt;/connectionStrings&gt;</pre> </li> <li>4 In the Infor CRM v8.4 Conversion Utility interface, select the check boxes appropriate for your implementation: <ul style="list-style-type: none"> <li>• Create opportunity pretty key</li> <li>• Convert opportunity document pricing properties</li> <li>• Create account and contact pretty key</li> <li>• Convert Proximity Search to Contour</li> <li>• Move CPQ Rulesets to Product CPQ Tab</li> <li>• Create default favorite groups</li> <li>• Perform BOD mapping migration</li> <li>• Migrate Secured Actions</li> <li>• Master Data Consolidation</li> </ul> For more information about each of these options, see <a href="#">page 17</a>. </li> <li>5 Click <b>Update</b>.</li> <li>6 Sign in using the Infor CRM Admin username and password.</li> <li>7 Click <b>Close</b>.</li> </ol>

Required for	Task Description
SLX Job Server	<p><b>36</b> Add Infor JobServer target and SixJobService portal.</p> <p>The Job Server enables scheduling 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"> <li>• Roll over incomplete activities</li> <li>• Update remaining days for active contracts</li> <li>• Perform update or delete of multiple records (bulk updates/deletes)</li> <li>• Reporting</li> <li>• Export to Excel</li> </ul> <p><b>To add</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Deployment Explorer</b>, right-click <b>Core Portals</b> and select <b>Edit Deployment</b>.</li> <li>2 Right-click <b>Deployment Targets</b> and select <b>Add Target(s)</b>.</li> <li>3 In the <b>Select Target(s)</b> window: <ol style="list-style-type: none"> <li>a In the <b>Select Deployment Target(s)</b> area, select the <b>File System</b> check box.</li> <li>b In the <b>Select Portal(s)</b> area, select the <b>SixJobService</b> check box.</li> <li>c Click <b>OK</b>.</li> </ol> </li> <li>4 In the <b>File System Target Settings</b> area, browse to the location for the SixJobService portal to be deployed to or enter the default path <b>%ALLUSERSPROFILE%\Sage\Scheduling\Tenants</b>. For example, C:\ProgramData\Sage\Scheduling\Tenants.</li> </ol> <p><b>Note</b> 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>
All Mobile	<p><b>37</b> Verifying the Port and App Pool are set</p> <p>Failure to set the Port and App Pool settings for your Mobile portal can cause the site to function as a virtual directory instead of an application. To prevent this, verify that the Port and App Pool are set before deploying the portal.</p> <p><b>To verify the Port and App Pool</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Application Architect View</b> menu, click <b>Deployment Explorer</b>.</li> <li>2 Expand <b>Deployments</b>, and then double-click the <b>Mobile Portal</b>. If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click OK.</li> <li>3 In the <b>Deployment Targets</b> tree view, click <b>IIS</b>. The IIS Target Settings appear.</li> <li>4 In the <b>Port</b> box, ensure that the port number for your Web Host server displays. It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333.</li> <li>5 In the <b>App Pool</b> box, ensure that the name of the application pool for your Web site displays. This name corresponds to the associated application pool for your Web site. For example, if you used the default Infor CRM Web site, the App Pool is Saleslogix. For more information about setting the Port and App Pools, see <i>Infor CRM Implementation Guide</i>.</li> </ol>

Required for	Task Description
All Mobile	<p><b>38</b> Enable multi-currency on the Mobile Client</p> <p>If your implementation includes Multi-currency, and you have users on the Mobile Client, you must complete the steps in this section.</p> <p>Multi-currency is disabled by default. To enable Multi-currency, you must copy a setting from the <code>products/argossaleslogix/configuration/production.default.js</code> file, paste it into the <code>products/argos-saleslogix/configuration/production.js</code> file and then edit the setting before deploying the portal.</p> <p>If you make your edit in the <code>products/argos-saleslogix/configuration/production.default.js</code> instead of the <code>products/argos-saleslogix/configuration/production.js</code> file, your edits will be overwritten during the next upgrade.</p> <p><b>To enable multi-currency on the Mobile Client</b></p> <ol style="list-style-type: none"> <li>1 Open the <b>Application Architect</b>.</li> <li>2 Open the <b>Project Explorer</b> and expand the <b>VFS</b> folder.</li> <li>3 Expand the <b>Portal Manager, Saleslogix Mobile Client, SourceFiles, Products, argos-Saleslogix, configuration</b>.</li> <li>4 Double-click <b>production.default.js</b>.</li> <li>5 Scroll the bottom of the file and locate <b>'multiCurrency'</b>.</li> <li>6 Copy the setting.dx</li> <li>7 Return to <b>Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration</b>.</li> <li>8 Double-click <b>production.js</b>.</li> <li>9 Paste the text you copied in step <b>6</b>. The file contains additional instructions to assist you.</li> <li>10 Change the setting from <b>'false'</b> to <b>'true'</b>.</li> <li>11 In the Application Architect menu bar, click <b>Save All</b>.</li> </ol>

Required for	Task Description
All Mobile	<p><b>39</b> Changing the warehouse mode in the Mobile Client</p> <p>Available to Promise enables users to see if there is stock on hand. If your implementation includes an integration with a back office that uses a specific warehouse location for the Available to Promise feature, you can enable users to check each warehouse inventory manually. Warehouse mode is disabled by default. To enable Warehouse mode, you must copy a setting from the <code>products/argos-saleslogix/configuration/production.default.js</code> file, paste it into the <code>products/argos-saleslogix/configuration/production.js</code> file and then edit the setting before deploying the portal.</p> <p>If you make your edit in the <code>products/argos-saleslogix/configuration/production.default.js</code> instead of the <code>products/argos-saleslogix/configuration/production.js</code> file, your edits will be overwritten during the next upgrade.</p> <p><b>To edit the .js file</b></p> <ol style="list-style-type: none"> <li>1 Open the <b>Application Architect</b>.</li> <li>2 Open the <b>Project Explorer</b> and expand the <b>VFS</b> folder.</li> <li>3 Expand the <b>Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration</b>.</li> <li>4 Double-click <b>production.default.js</b>.</li> <li>5 Scroll to the bottom of the file and locate "<b>warehouseDiscovery</b>".</li> <li>6 Copy the setting.</li> <li>7 Return to <b>Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration</b>.</li> <li>8 Double-click <b>production.js</b>.</li> <li>9 Paste the text you copied in step 6. The file contains additional instructions to assist you.</li> <li>10 Insert this line: * <b>warehouseDiscovery: 'manual'</b>.</li> <li>11 In the <b>Application Architect</b> toolbar, click the <b>Save All</b> icon.</li> </ol>

Required for	Task Description
All Mobile	<p><b>40</b> Enable Offline Support in the Mobile Client</p> <p>Offline support allows read-only access to select records and entities when a user's device is offline or loses connectivity.</p> <p>Offline support is disabled by default. To enable offline support, you must edit the products/argossaleslogix/ configuration/production.js file before deploying the portal.</p> <p>If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.</p> <p><b>To edit the .js file</b></p> <ol style="list-style-type: none"> <li>1 Open the <b>Application Architect</b>.</li> <li>2 Open the <b>Project Explorer</b> and expand the <b>VFS</b> folder.</li> <li>3 Expand the <b>Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration</b>.</li> <li>4 Double-click <b>production.default.js</b>.</li> <li>5 Scroll to the bottom of the file and locate "<b>enableOfflineSupport</b>".</li> <li>6 Copy the setting.</li> <li>7 Return to <b>Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration</b>.</li> <li>8 Double-click <b>production.js</b>.</li> <li>9 Paste the text you copied in step 6. The file contains additional instructions to assist you.</li> <li>10 Change the setting from 'false' to 'true'.</li> <li>11 In the <b>Application Architect</b> toolbar, click the <b>Save All</b> icon.</li> </ol>
All web	<p><b>41</b> Build and deploy the portals.</p> <p>You must verify the build path prior to building.</p> <p><b>Note</b> This step is strongly recommended for customized environments to establish a functioning Web Client before adding customizations.</p> <p><b>To build and deploy</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Application Architect</b>, on the <b>Tools</b> menu, click <b>Build Settings</b>.</li> <li>2 In the <b>Build Search Path</b>, verify that the path is set to: %BASEBUILDPATH%\assemblies;%BASEBUILDPATH%\interfaces\bin;%BASEBUILDPATH%\forminterfaces\bin</li> <li>3 If you needed to edit the path, you must also clear the output folders. <ul style="list-style-type: none"> <li>• On the <b>Build</b> menu, click <b>Clean Build Folders</b>.</li> </ul> </li> <li>4 On the <b>Build</b> menu, click <b>Build Web Platform</b>. <b>Note</b> If an error message appears, log out of Application Architect, log back in, and repeat step 4.</li> <li>5 When the build has completed, click the <b>Deploy All</b> button. <b>Note</b> Be sure to deploy the Mobile portal if your installation includes the Infor CRM Mobile Client.</li> </ol>
All	<p><b>42</b> Close the Application Architect, stop and restart all Infor CRM services, and reset IIS.</p>

Required for	Task Description
Web - Optional	<p><b>43</b> Enable HTTP Compression on IIS 7 with IIS 6 compatibility.</p> <p><b>Note</b> IIS 6 compression is documented in the <i>Infor Implementation Guide</i>.</p> <p>If your Web site(s) will 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><b>To enable</b></p> <ol style="list-style-type: none"> <li>1 Open IIS Manager, and select your Infor CRM Web site.</li> <li>2 Under <b>IIS</b>, double-click <b>Compression</b>.</li> <li>3 Select the <b>Enable dynamic content compression</b> check box. If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box.</li> <li>4 In the <b>Actions</b> pane, click <b>Apply</b>.</li> <li>5 If necessary, modify the <b>ApplicationHost.config</b> file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.</li> </ol> <p><b>IMPORTANT:</b> Use the 64 bit version of a text editor (e.g. Notepad.exe) when editing ApplicationHost.config; otherwise, when using a 32 bit version of a text editor the file save will be redirected to %SystemRoot%\SysWow64\inetsrv\config\applicationHost.config and the compression settings will not take effect. The following command line can be used to edit the applicationHost.config file correctly:</p> <pre>"%WinDir%\Notepad.exe" "%SystemRoot%\System32\inetsrv\config\applicationHost.config"</pre>

Required for	Task Description
	<p><b>Task 43 - continued</b></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 <a href="http://www.iis.net/ConfigReference">http://www.iis.net/ConfigReference</a>.</p> <ul style="list-style-type: none"> <li>• <b>Example Configuration Settings:</b></li> </ul> <pre> &lt;httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files" maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false"&gt; &lt;scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10"/&gt; &lt;scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10" /&gt; &lt;staticTypes&gt; &lt;add mimeType="text/*" enabled="true" /&gt; &lt;add mimeType="message/*" enabled="true" /&gt; &lt;add mimeType="application/*" enabled="true" /&gt; &lt;add mimeType="/" enabled="false" /&gt; &lt;/staticTypes&gt; &lt;dynamicTypes&gt; &lt;add mimeType="text/*" enabled="true" /&gt; &lt;add mimeType="message/*" enabled="true" /&gt; &lt;add mimeType="application/*" enabled="true" /&gt; &lt;add mimeType="/" enabled="false" /&gt; &lt;/dynamicTypes&gt; &lt;/httpCompression&gt; &lt;/Quote&gt; </pre>

Required for	Task Description
	<p><b>Task 43 - continued</b></p> <p>The following script will enable both static and dynamic compression based on the Infor CRM Implementation Guide recommendations:</p> <pre> REM staticTypes  REM Enable static compression %windir%\System32\inetsrv\appcmd set config - section:system.webServer/urlCompression /doStaticCompression:"True" /commit:apphost  REM Clear the staticTypes section %windir%\System32\inetsrv\appcmd clear config - section:system.webServer/httpCompression /"staticTypes" /commit:apphost  REM &lt;add mimeType="text/*" enabled="true" /&gt; %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes.[mimeType='text/*',enabled='True']" /commit:apphost  REM &lt;add mimeType="message/*" enabled="true" /&gt; %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes.[mimeType='message/*',enabled='True']" /commit:apphost  REM &lt;add mimeType="application/*" enabled="true" /&gt; %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes.[mimeType='application/*',enabled='True']" /commit:apphost </pre>
	<p><b>44</b> Next Steps:</p> <ul style="list-style-type: none"> <li>• If your installation included customizations to the Network Client, proceed to task number <a href="#">45</a>.</li> <li>• If your installation included customizations to the Web Client, proceed to task number <a href="#">46</a>.</li> <li>• If your installation included customizations to the Mobile Client, proceed to task number <a href="#">52</a>.</li> <li>• If your installation includes remote offices or remote users, proceed to task number <a href="#">61</a>.</li> </ul>

## Re-apply your customizations

These tasks detail merging your preserved customizations with the new plugins provided in the Infor CRM v8.4 upgrade. If your installation does not include customizations to the Web Client, Windows Client, or Mobile portal, you can safely omit this section.

Required for	Task Description
Customized Network	<p><b>45</b> Apply the changes listed in <a href="#">Chapter 3, “Plugin changes in this release” on page 67</a>. You can use one of the following strategies:</p> <ul style="list-style-type: none"> <li>• Add your customizations to the Infor CRM plugins (recommended).</li> <li>• Add the Infor CRM changes to your custom plugins.</li> </ul> <p>After applying plugin changes, release the appropriate plugins using Architect.</p> <p><b>Note</b> See the “Release a Plugin for Use” topic in the Architect Help for information on releasing plugins.</p>
Customized Web	<p><b>46</b> Use the Application Architect to apply your custom bundle.</p> <p><b>Note</b> If you have not customized your Web implementation, disregard this task.</p> <p>Install the bundle of your Web customizations (that you created in task number <a href="#">12</a>) to the new v8.4 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><b>Note</b> The default behavior is to overwrite the item in the target project (the 8.4 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><b>Upgrading Customizations Technical Preview</b></p> <p>The QuickFormDiff utility is available as a technical preview. (You can download this utility from the SLXToolsContrib repository at <a href="https://github.com/SaleslogixSLXToolsContrib">https://github.com/SaleslogixSLXToolsContrib</a>.) 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>

Required for	Task Description
Customized Web	<p><b>Task 46 - continued</b></p> <p><b>To merge changes during bundle installation</b></p> <ol style="list-style-type: none"> <li>1 In the Project Explorer, right-click your project folder, and then click <b>Install Bundle</b>. The Select Bundle to Install dialog box opens.</li> <li>2 Browse to and select the bundle you created in task number <a href="#">12</a> containing your customizations, and then click <b>Open</b>. The Install Bundle dialog box appears.</li> <li>3 Verify the <b>Bundle Path</b> information is correct, and then click <b>Next</b>. 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.</li> <li>4 On the <b>Select Items</b> screen, ensure the <b>Entity Model</b> and <b>Portals</b> check boxes are selected.</li> <li>5 This screen indicates the number of items that conflict with existing items in the current project. 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.</li> <li>6 If you want to save changes made during the bundle installation, click the <b>Preserve Merged Content</b> 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).</li> <li>7 Clear the <b>Only stop at items that require user intervention</b> 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.</li> <li>8 Use the <b>Next Dup</b> and <b>Prev Dup</b> 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.</li> <li>9 In the <b>Install Action</b> drop-down list, select <b>DiffMerge</b>.  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.</li> </ol>

Required for	Task Description
	<p><b>Task 46 - continued</b></p> <p>10 After making your changes, click <b>Merge Item</b>. 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.</p> <p><b>Note</b> 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 <b>View Item</b>. The View Bundle Item text editor opens.</p> <p><b>Note</b> 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 <b>Next</b>. Click <b>Finish</b>.</p>
Customized Web	<p><b>47</b> If necessary, apply your custom schema to the database.</p> <p>If the database you are restoring the project to is the database where your customizations were created, custom schema is already included.</p> <p>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.</p> <p>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><b>48</b> Recreate your Dashboard customizations with the customization you recorded in task number <a href="#">10</a>.</p>
Customized Web	<p><b>49</b> Reapply customizations from the web.config file(s) to the web.config and appSettings.config file(s).</p> <p>In version 8.4, application settings are located in the appSettings.config file. Customizations to the appSettings section must be merged into the appSettings.config file.</p> <p>For more information see the “Editing Configuration Files” topic in the Application Architect help.</p> <p><b>To update</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Application Architect</b>, open the web.config file.</li> <li>2 Update the new web.config files with the customizations you recorded in task number <a href="#">7</a>.</li> <li>3 In the <b>Application Architect</b>, open the appSettings.config file.</li> <li>4 Merge any customization made to the appSettings section of the web.config file to the appSettings.config file.</li> </ol>
Customized Web	<p><b>50</b> 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><b>Customized Web</b></p>	<p><b>51</b> 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 overwrite the new icons delivered in version 8.4. 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><b>To install the bundle</b></p> <ol style="list-style-type: none"> <li>1 Browse the Infor CRM media, expand the <b>Upgrades\Project Backups</b> folder, and copy the <b>8.2 Images VFS.zip</b> to a convenient location.</li> <li>2 Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.</li> <li>3 Open the <b>Application Architect</b>.</li> <li>4 In the <b>Project Explorer</b>, right-click the project, and then click <b>Install Bundle</b>.</li> <li>5 Navigate to the folder where you copied the 8.2 Images VFS.zip, and then click <b>Open</b>.</li> <li>6 On the <b>Select Bundle</b> screen, click <b>Next</b>. 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.</li> <li>7. On the <b>Select Items</b> screen, ensure the <b>Portals</b> option is selected.</li> <li>8. Click <b>Next</b>, and then click <b>Finish</b>.</li> </ol>
<p><b>Customized Infor Mobile (includes customized Infor Mobile for ICBOE)</b></p>	<p><b>52</b> Convert your mobile customizations. Complete these steps for Mobile ( which now includes Mobile for ICBOE)</p> <p><b>To convert</b></p> <ol style="list-style-type: none"> <li>1 Change all modules (files) to use AMD loading.</li> <li>2 Change all Ext calls to Dojo equivalents.</li> <li>3 Verify that all modules names are fixed to reflect the new folder structure.</li> <li>4 Verify that any property name changes do not affect your views or customizations.</li> <li>5 Verify that the changed function names/removal do not affect your views or customizations.</li> <li>6 Consider the newly added properties and methods to enhance existing customizations.</li> </ol>
<p><b>Customized Infor Mobile</b></p>	<p><b>53</b> Recreate your Mobile customizations by merging in the customizations you recorded in task <a href="#">13</a>.</p>
<p><b>All Web - Recommended</b></p>	<p><b>54</b> 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>

Required for	Task Description
Customized Web	<p><b>55</b> 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><b>Note</b> 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>

## Upgrade synchronization

Required for	Task Description
Remotes	<b>56</b> If you did not upgrade the Synchronization Server(s) in task 26, do so now.
All	<b>57</b> Restart the Sync Service(s).

## Upgrade Clients and Remote Offices

These tasks are required to upgrade your Clients. If your installation includes Remote Offices, upgrade steps are included in this section.

### Upgrade Web Clients

Required for	Task Description
Web	<p><b>58</b> Web Client users access the updated Web Client portal. No additional tasks are required.</p> <p><b>Note</b> if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see <a href="#">“Upgrading Infor CRM Xbar for Microsoft Outlook” on page 51</a>.</p>

### Upgrade Network Clients

Required for	Task Description
Network Client	<p><b>59</b> Run the Infor CRM Network Client installation on each of your Network user’s computers.</p> <ul style="list-style-type: none"> <li>• <b>Run the Infor CRM Client installation.</b> 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 28 for detailed steps.</li> </ul> <p><b>Note</b> if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see <a href="#">“Upgrading Infor CRM Xbar for Microsoft Outlook” on page 51</a>.</p>

## Upgrade Mobile Clients

Required for	Task Description
Mobile	<p><b>60</b> If necessary, send the Mobile Portal URL to Users</p> <p>Send the Mobile portal URL to mobile users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.</p> <p>For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: <a href="https://YourSixWebServer/SixMobile">https://YourSixWebServer/SixMobile</a>.</p> <p>The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.</p>

## Upgrade Remote Users and Offices

Required for	Task Description
Remote Users and Offices	<p><b>61 Create a Remote User or Remote Office Database</b></p> <p>In Infor CRM v8.4, you must create new Remote databases. Create these databases using a Microsoft SQL Server Express instance or the SQL Host Server.</p> <p>When a remote database is created, it uses the host server collation settings. When the database is sent to the remote it will use the SQL Express installation collation settings.</p> <p>When you install the Remote Client and use the Infor CRM media to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.</p> <p>However, if you install SQL Express using a standalone install prior to installing Infor CRM then you must ensure that the collation is set correctly as per the Host Database, otherwise where the Windows System Locale is anything other than English (US), SQL Express will use the Windows System Locale settings to determine your collation and it will be incorrect.</p> <p>For more information, see the Knowledgebase article called <i>Understanding Collation and Remote Databases</i>.</p> <p><b>To create</b></p> <ol style="list-style-type: none"> <li>In the Infor CRM LAN Administrator, on the Administrator <b>Tools</b> menu, do one of the following depending upon whether you are creating a Remote User database or a Remote Office database: <ul style="list-style-type: none"> <li>Click <b>Create Remote User Databases</b>.</li> <li>Click <b>Create Remote Office Databases</b>.</li> </ul> </li> <li>In the <b>Create Databases</b> dialog box, do one of the following: <ul style="list-style-type: none"> <li>Under <b>Available Users</b>, select the user(s) for whom the database(s) will be created, and click the arrow to move them to the <b>Selected Remote Offices</b> box.</li> <li>Under <b>Available Remote Offices</b>, select the user(s) for whom the database(s) will be created, and click the arrow to move them to the <b>Selected Users</b> box.</li> </ul> </li> <li>Configuring the default database settings is explained in <a href="#">“Setting Database Options” on page 37 of the Infor CRM Implementation Guide</a>. To change the settings for this user only, click Options or Properties and configure the changes.</li> <li>Each database is placed in the folder specified in the <b>Create Remote DB in server directory box</b> on the</li> <li>Database tab of the Options dialog box. To create the database(s), do one of the following. <ul style="list-style-type: none"> <li>To create the database(s) immediately, click <b>Now</b>.</li> <li>To create the database(s) at a later time, click <b>Later</b>.</li> <li>In the calendar, select a date and time, and then click <b>OK</b>. The Administrator is unavailable when the timer is active.</li> <li>The <b>Create Databases</b> dialog box displays a countdown to the scheduled date and time.</li> </ul> <p>A test is performed to ensure the settings are configured and that the database can be created in the chosen location.</p> <p>The database is created with the file name <i>SLX_userid_dat.sxd</i>.</p> </li> <li>Click <b>OK</b> to confirm successful completion.</li> </ol>

Required for	Task Description
	<p><b>Task 61 - continued</b></p> <p>7 Transfer the database to the appropriate computer.</p> <ul style="list-style-type: none"> <li>• If the computer is connected to the network, create a folder on the Administrative Workstation and copy the database to the folder. Share this folder so that the Remote (User or Office) computer has access to it.</li> <li>• If the Remote is not connected to the network, copy the database to the user's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote user, and instruct the user to copy it to his or her computer and unzip it</li> </ul>
Remote Office	<p><b>62</b> Upgrade the Remote Office</p> <p>Upgrade the Remote Office by running the Remote Office installation package.</p> <p><b>To install</b></p> <ol style="list-style-type: none"> <li>1 On the <b>Infor CRM Installation</b> screen, click <b>Server Installation</b>.</li> <li>2 On the <b>Server Installation</b> screen, click <b>Remote Office Server</b>.</li> <li>3 On the <b>Welcome</b> and <b>License Agreement</b> screens, read the information and accept the agreement, and then click <b>Next</b>.</li> <li>4 On the <b>Setup Type</b> screen, select an installation type, and then click <b>Next</b>. <ul style="list-style-type: none"> <li>• Select <b>Complete</b> to install all components on this computer.</li> <li>• Select <b>Custom</b> to install only certain components or to change the installation location. Use the <b>Custom Setup</b> screen to enable or disable items for installation.</li> </ul> </li> <li>5 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"> <li>• <b>Use Local System Account</b> - Select this option if the local user account has the correct security permissions to install Infor CRM.</li> <li>• <b>Domain</b> - Type the network domain where you created the Infor CRM Service user.</li> <li>• <b>User Name</b> - Type the name of the Infor CRM Service user (for example, SLXService).</li> <li>• <b>Password</b> and <b>Confirm</b> - Type the Infor CRM Service user's password.</li> <li>• <b>Port Change</b> 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.</li> <li>• <b>Configure IIS for the Web Server</b> - Select this check box if your installation includes the Saleslogix Client and/or SData portals. This makes necessary modifications to IIS.</li> </ul> </li> <li>6. On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation.</li> </ol>

Required for	Task Description
Remote Users	<p><b>63</b> Deploy the SData portal to your Remote Client users.</p> <p>In version 8.4, Infor CRM Remote Network Client users require an SData portal to enable support for such features as Infor CRM Xbar for Microsoft Outlook. Use the Application Architect to deploy this portal to the appropriate users.</p> <p><b>To deploy</b></p> <ol style="list-style-type: none"> <li>1 On the Application Architect <b>View</b> menu, click <b>Deployment Explorer</b>.</li> <li>2 In the <b>Deployments</b> tree view, double-click <b>Remote Users</b>.</li> <li>3 (Optional) In the <b>Deployment Settings</b> pane, in the <b>Name</b> box, type an intuitive deployment name. For example, Remote Users.</li> <li>4 In the <b>Description</b> box, type a description for this deployment. For example, "Provides SData portal for Remote Users."</li> <li>5 In the <b>Deployment Targets</b> pane, click <b>Remote Users</b>. The Remote User Target Settings appear.</li> <li>6 In the <b>Remote User Target Settings</b> pane, click <b>Add</b>.</li> <li>7 In the <b>Select Remote User(s)</b> dialog box, select the names of the users who need to access the SData portal.</li> <li>8 Ensure the <b>Deploy Portal</b> check box is selected. This indicates the portal is active and should be deployed.</li> <li>9 Click <b>Save</b>.</li> <li>10 Click <b>Deploy</b>. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.</li> </ol>

Required for	Task Description
Offline Web Client	<p><b>64</b> Deploy Web portals to the Offline Web Client users.</p> <p>The Web Portals are:</p> <ul style="list-style-type: none"> <li>• SlxClient</li> <li>• SData</li> <li>• SlxJob Service</li> </ul> <p>Use the Application Architect to deploy the Infor CRM Web portals.</p> <p><b>To deploy</b></p> <ol style="list-style-type: none"> <li>1 On the Application Architect <b>View</b> menu, click <b>Deployment Explorer</b>.</li> <li>2 In the <b>Deployments</b> tree view, double-click <b>Remote Users</b>.</li> <li>3 (Optional) In the <b>Name</b> box, type a deployment name. For example, Offline Web Clients.</li> <li>4 In the <b>Description</b> box, type a description for this deployment.</li> <li>5 In the <b>Deployment Targets</b> pane, click <b>Remote Users</b>. The Remote User Target Settings appear.</li> <li>6 In the <b>Remote User Target Settings</b> pane, click <b>Add</b>.</li> <li>7 In the <b>Select Remote User(s)</b> dialog box, select the remote users who will receive the Offline Web Client deployment.</li> <li>8 8. On the <b>SlxClient</b> tab:       <ol style="list-style-type: none"> <li>a In the <b>Virtual Directory</b> box, type the alias name for the virtual directory. By default, the Virtual Directory is SlxClient.</li> <li>b In the <b>Port</b> box, type the port number for the Web site. The Infor CRM Web Server requires its own port for each portal instance. The port for each portal must be unique.</li> <li>c Ensure the <b>Deploy Portal</b> check box is selected. This indicates the portal is active and should be deployed.</li> </ol> </li> <li>9 Click <b>Save</b>.</li> <li>10 Click <b>Deploy</b>. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.</li> </ol>

Required for	Task Description
Remote Offices	<p><b>65</b> Deploying the Web Portals for the Remote Office</p> <p>Remote Offices can support both Windows Network Client users and Web Client users. Each type of user requires that you use the Application Architect installed at the main office to deploy the relevant portal(s).</p> <p>For the Web Client user, the required portals are:</p> <ul style="list-style-type: none"> <li>• SlxClient</li> <li>• SData</li> <li>• SlxJob Service</li> </ul> <p>For the Windows Network Client, the required portal is:</p> <ul style="list-style-type: none"> <li>• SData</li> </ul> <p><b>To deploy the SData portal for the Network Client Remote Office</b></p> <ol style="list-style-type: none"> <li>1 On the Application Architect <b>View</b> menu, click <b>Deployment Explorer</b>.</li> <li>2 In the <b>Deployments</b> tree view, double-click <b>Remote Sales Client</b>.</li> <li>3 In the <b>Name</b> box, type a name for the deployment.</li> <li>4 In the <b>Description</b> box, type a description for this deployment. For example, "Portals to support the Web Client at the Remote Office.</li> <li>5 In the <b>Deployment Targets</b> tree view, click <b>Remote Office(s)</b>.</li> <li>6 The Remote Office Target Settings appear. <ol style="list-style-type: none"> <li>a In the <b>Server</b> box, type the name of your Web Host server. If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server.</li> <li>b Ensure the <b>Deploy Target</b> check box is selected. This indicates the target is active and should be deployed.</li> <li>c In the <b>Port</b> box, type the port number for your Web Host server. It must match the port for the Web site.</li> <li>d In the <b>App Pool</b> box, type the name of the application pool for your Web site. For example, if you used the <i>Saleslogix</i> Web site, the App Pool is <i>Saleslogix</i>.</li> </ol> </li> <li>7 In the <b>Company Name</b> list, select the Remote Office(s) to which you want to deploy the Web Client.</li> <li>8 Select the tab for the SData portal: <ol style="list-style-type: none"> <li>a In the <b>Virtual Directory</b> box, type the alias name for the virtual directory.</li> <li>b In the <b>Sub Directory</b> box, type the folder name where all portal files will be copied under the target's base directory.</li> <li>c Ensure the <b>Deploy Portal</b> check box is selected. This indicates the portal is active and should be deployed.</li> </ol> <p><b>Note</b> When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.</p> </li> <li>9 Click <b>Save</b>.</li> <li>10 Click <b>Deploy</b> to deploy the portal to the Remote Office.</li> </ol> <p>The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, the portals are deployed to the remote.</p>

Required for	Task Description
	<p><b>Task 65 - continued</b></p> <p><b>To deploy the SData portal for the Web Client user</b></p> <ol style="list-style-type: none"> <li>1 On the Application Architect <b>View</b> menu, click <b>Deployment Explorer</b>.</li> <li>2 In the <b>Deployments</b> tree view, double-click <b>Windows Remote Client</b>.</li> <li>3 In the <b>Name</b> box, type a name for the deployment.</li> <li>4 In the <b>Description</b> box, type a description for this deployment. For example, "SData Portal at the Remote Office."</li> <li>5 In the <b>Deployment Targets</b> tree view, click <b>Remote Office(s)</b>.</li> <li>6 The Remote Office Target Settings appear. <ol style="list-style-type: none"> <li>a In the <b>Server</b> box, type the name of your Web Host server. If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server.</li> <li>b Ensure the <b>Deploy Target</b> check box is selected. This indicates the target is active and should be deployed.</li> <li>c In the <b>Port</b> box, type the port number for your Web Host server. It must match the port for the Web site.</li> <li>d In the <b>App Pool</b> box, type the name of the application pool for your Web site. For example, if you used the <i>Saleslogix</i> Web site, the App Pool is <i>Saleslogix</i>.</li> </ol> </li> <li>7 In the <b>Company Name</b> list, select the Remote Office(s) to which you want to deploy the Web Client.</li> <li>8 Select the tab for each portal you want to deploy (SlxClient, SData, and/or SlxJobService): <ol style="list-style-type: none"> <li>a In the <b>Virtual Directory</b> box, type the alias name for the virtual directory.</li> <li>b In the <b>Sub Directory</b> box, type the folder name where all portal files will be copied under the target's base directory.</li> <li>c Ensure the <b>Deploy Portal</b> check box is selected. This indicates the portal is active and should be deployed.</li> </ol> </li> </ol> <p><b>Note</b> When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.</p> <ol style="list-style-type: none"> <li>9 Click <b>Save</b>.</li> <li>10 Click <b>Deploy All</b> to deploy all portals in the Remote Office.</li> </ol> <p>The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, portals are deployed to the remote.</p>
<b>All Remotes</b>	<p><b>66</b> Running a Synchronization Cycle</p> <p>After deploying the Web site, a synchronization cycle must run to deploy the portal to remotes. Synchronization is set to run automatically every 30 minutes. You can run a manual synchronization cycle immediately or wait for an automated cycle to complete.</p>

Required for	Task Description
	<p><b>67</b> Installing the Offline Web Client</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"> <li>• Microsoft SQL Express 2012</li> <li>• Net Framework 4.5.1 installed in Integrated mode</li> <li>• Microsoft SQL 2005 Backwards Compatibility</li> <li>• Net AJAX Extensions</li> <li>• Internet access to Microsoft.com</li> </ul> <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><b>Installing Without Administrator Rights</b></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> <p><b>Installing With Administrator Rights</b></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"> <li>• Add each user to the local machine's Admin group for the duration of the implementation.</li> <li>• Use a domain user account that is a member of the domain admin group for the duration of the implementation.</li> </ul> <p><b>Installing the Offline Web Client</b></p> <p>The Infor CRM Personal Web Server is installed with the Offline Web Client to host the Infor CRM portals on the Remote computer. Therefore, IIS is not required on the Remote Client computer.</p> <p><b>To install</b></p> <ol style="list-style-type: none"> <li>1 On the <b>Infor CRM Installation</b> screen, click <b>Client Installations</b>.</li> <li>2 On the <b>Client Installation</b> screen, click <b>Install Offline Web Client</b>.</li> <li>3 On the <b>Welcome</b> screens, read the information and then click <b>Next</b>.</li> <li>4 On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation</li> </ol>
<b>Remotes Users and Offices</b>	<p><b>68</b> 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>

Required for	Task Description
Remotes	<p><b>69</b> 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><b>To upgrade</b></p> <ol style="list-style-type: none"> <li>1 In the Install browser (<b>Setup.exe</b>) click <b>Client Installations&gt; Install Remote Client</b>. <ul style="list-style-type: none"> <li><b>Note</b> 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"> <li>• Click <b>Install</b> to allow Infor CRM to install the required components</li> <li>• Click <b>Cancel</b> to stop the installation.</li> </ul> </li> </ul> <p>For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.</p> </li> <li>2 On the <b>Welcome</b> screen, read the information then click <b>Next</b>.</li> <li>3 On the <b>Setup Type</b> screen, select an installation type, and then click <b>Next</b>. <ul style="list-style-type: none"> <li>• Select <b>Complete</b> to install all components on this computer.</li> <li>• Select <b>Custom</b> to install only certain components or to change the installation location. Use the <b>Custom Setup</b> screen to enable or disable items for installation.</li> </ul> </li> <li>4 On the remaining screens, click <b>Install</b> and <b>Finish</b> to complete the installation. <ul style="list-style-type: none"> <li><b>Note</b> 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.</li> </ul> </li> <li>5 If prompted, restart your computer when the installation completes.</li> </ol> <p><b>Note</b> if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see <a href="#">“Upgrading Infor CRM Xbar for Microsoft Outlook” on page 51</a>.</p>

Required for	Task Description
Remote Users and offices, Offline Web Client users	<p><b>70</b> Install the Remote Database</p> <p>Before logging on to the Remote Client, you must attach the Remote database using the Remote Database Setup dialog box.</p> <p>The connection contains the following values:</p> <ul style="list-style-type: none"> <li>• The Database Name is set to SLXRemote.</li> <li>• The Server Name is set to the name of the Remote user's computer. To change this value, right-click <b>My Computer</b> on your desktop, and click <b>Properties</b>. The computer name appears on the <b>Computer Name</b> tab.</li> <li>• The <b>User</b> name is set to sa.</li> <li>• The sysdba password is set to Ma\$t3rk3y.</li> </ul> <p>When attaching the remote database, if the sysdba user does not exist, the user is created with a password set to Ma\$t3rk3y. If the sysdba user already exists in the remote Microsoft SQL instance, then the sysdba user's password remains unchanged. However, the database installation sets the sysdba password in the Connection Manager to Ma\$t3rk3y. Therefore, if the sysdba password on the remote database is set to a value other than Ma\$t3rk3y, the Remote user must open the Connection Manager and change the sysdba password to the value in their database.</p> <p><b>To install</b></p> <ol style="list-style-type: none"> <li>1 Browse to the location of the Remote user database. <ul style="list-style-type: none"> <li>• For Remote Users and Offline Web Client users, the database file name is <i>SLX_userid_dat.sxd</i>.</li> <li>• For Remote Offices, the databases the database file name is <i>SLX_sitecode_dat.sxd</i></li> </ul> </li> <li>2 Double-click the Remote database.</li> <li>3 In the <b>Remote Database Setup</b> dialog box, click <b>OK</b>.</li> <li>4 In the <b>Infor CRM Attach Remote</b> dialog box click <b>OK</b> to confirm a successful installation.</li> </ol> <p>If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the 'Select the name of the SQL instance to use' dialog box.</p> <p>The Attach Remote utility assumes the sa password is SLXMa\$t3r. If you did not install Microsoft SQL Express using the Infor CRM installation, you may have to change the sa password in the Remote Database Setup dialog box before the database can be successfully attached.</p>
	<p><b>71</b> Run a Synchronization Cycle</p> <p>Users must run a synchronization cycle before they can log on to the Web Client. The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.</p> <p><b>To run</b></p> <ol style="list-style-type: none"> <li>1 On the <b>Start</b> menu, point to <b>Programs</b>, point to <b>Saleslogix</b>, and then click <b>Synchronization Client</b>.</li> <li>2 Log on using your Infor CRM user name and password.</li> <li>3 Click <b>Sync Now</b>.</li> </ol>

Required for	Task Description
<b>Web Client, Offline Web Client</b>	<p><b>72</b> Signing in to the Web Client</p> <p>After running a synchronization cycle to set up the portal, users can sign in to the Web Client using the system tray icon.</p> <p><b>To log on</b></p> <ol style="list-style-type: none"> <li>1 Right-click the system tray icon, and then click <b>Open Site</b>.</li> <li>2 Log on using the standard Web Client log on screen.</li> </ol>
<b>Remote Office</b>	<p><b>73</b> Populate views for the Remote Office Web Client</p> <p>In a Remote Office environment, sign into the Infor CRM LAN Client once before signing into the Infor CRM Web Client. This allows some views in the Web Client database to populate correctly. If you do not sign into the LAN Client before signing into the Web Client, an error will appear when attempting to open the Detail dialog caused by the missing database views.</p>
<b>Remote User</b>	<p><b>74</b> Start the Remote Client</p> <p>After installation, the user who installed Infor CRM must log on to the Client computer(s) for the first time and launch various applications. This process creates the necessary registry entries for each application and creates a connection to the Remote database.</p> <p>If the standard user does not have rights to install Infor CRM, an admin user must start the Client application. If the standard user has installation rights, he/she can simply log on and begin using Infor CRM. The Infor CRM Client must write to restricted areas of the registry. Therefore, once an admin user has logged on to the Client, a standard user can read from the registry's restricted area.</p> <p><b>To start</b></p> <ol style="list-style-type: none"> <li>1 On the <b>Start</b> menu, point to <b>Programs</b>, point to <b>Saleslogix</b>, and then click <b>Infor CRM Client</b>.</li> <li>2 In the <b>Please log on</b> dialog box: <ol style="list-style-type: none"> <li>a Type your <b>Username</b> and <b>Password</b>.</li> <li>b In the <b>Log on to</b> box, ensure the correct database connection name displays (for example, SLXRemote).</li> <li>c Click <b>OK</b>.</li> </ol> </li> <li>3 Open the SLMailClient.exe. By default, the Mail Client is installed in ...\\Program Files\\Saleslogix\\SLMail.</li> <li>4 (Optional) Configure synchronization of the Remote user's database to run automatically when the user is logged on to the main office database. For more information on automated synchronization, see the "Infor CRM Synchronization Client" topic in the Infor CRM Client Help.</li> </ol>

Required for	Task Description
	<p><b>75</b> Creating a SpeedSearch Schedule</p> <p>You can set a schedule on the Remote user's computer to determine when SpeedSearch indexes are run. If a schedule is not set and your Host updates indexes when the Remote computer is turned off, the indexes on the Remote are updated when the user starts their computer. This update may delay the user as he/she cannot immediately start their work.</p> <p><b>To create</b></p> <ol style="list-style-type: none"> <li>1 On the Infor CRM Client <b>Tools</b> menu, click <b>SpeedSearch Options</b>.</li> <li>2 In the <b>Index</b> list, select the index(es) for which you want to set a schedule.</li> <li>3 In the <b>Full Update</b> section, select the date and time you want the index(es) to complete a full update.</li> <li>4 In the <b>Daily Update</b> section, select how you want to schedule daily incremental updates. <ul style="list-style-type: none"> <li>• <b>When Infor CRM Opens</b> - All enabled indexes are updated when you open the Infor CRM Client.</li> <li>• <b>When Infor CRM Closes</b> - All enabled indexes are updated when you close the Infor CRM Client.</li> <li>• <b>Once at</b> - Select the time of day that you want to update all enabled indexes.</li> <li>• <b>Repeat Every</b> - Select or type how often you want all enabled indexes to be updated.</li> </ul> </li> <li>5 5. Click <b>OK</b>.</li> </ol>
<b>Remotes</b>	<p><b>76</b> Instruct Remote users and Offices to log on to the Synchronization Client and sync immediately after upgrading.</p> <p><b>Note</b> Ensure Remote users and Offices enable "Apply Changes" during the synchronization cycle.</p>
<b>Remotes</b>	<p><b>77</b> Cycle your Synchronization Server(s) so changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription.</p> <p><b>Note</b> See the "Creating a Custom Sync Cycle" topic in the Administrator Help for more information.</p>

## Additional Web Client upgrade tasks

Required for	Task Description
All Web	<p><b>78</b> Instruct Web Client and Offline Web Client users to download the Office Integration Module.</p> <p>In prior versions of Infor CRM, Office Integration was installed as part of Desktop Integration. Office Integration extends Infor CRM Web Client functionality by downloading client-side files for Mail Merge.</p> <p><b>Note</b> Outlook Integration (Send to CRM and Record to History) functionality is now delivered with Xbar. See <a href="#">"Upgrading Infor CRM Xbar for Microsoft Outlook" on page 51</a>.</p> <p>Before users install and configure these features, ensure you configured SData as detailed in task number <a href="#">80</a>.</p> <p><b>To install and configure</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b>. <ul style="list-style-type: none"> <li>• For Web Client users, open the Infor CRM Web site.</li> <li>• For Offline Web Client users, in your System Tray, right-click <b>Personal Web Server</b>, point to <b>SlxClient</b>, and click <b>Open Site</b>.</li> </ul> </li> <li>1 Expand the <b>Tools</b> menu and then click <b>Options</b>.</li> <li>2 Click the <b>General</b> tab, and then click <b>Install Office Integration</b>.</li> <li>3 Follow the installation instructions on screen..</li> </ol> <p>You must be a Power User or Admin user to install Outlook Integration.</p>
All Web	<p><b>79</b> 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>

Required for	Task Description
<p><b>Web Client (optional)</b></p> <p><b>Customer Portal (optional)</b></p>	<p><b>80</b> Re-configure 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. If your installation included Password Self-service and you want to continue to use it, you must reconfigure it now.</p> <p>The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file.</p> <p><b>Note</b> 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><b>To turn password self-service on</b></p> <ol style="list-style-type: none"> <li>1 Open the <b>Application Architect</b> and expand the <b>Project Explorer</b>.</li> <li>2 Expand <b>Portal Manager&gt;SlxClient&gt;Support Files</b>, and then double-click <b>appSettings.config</b>.</li> <li>3 Scroll through the file to locate “<b>Defines the settings for sending email</b>”.</li> <li>4 Edit using the instructions in the appSettings.config file for guidance.</li> <li>5 Save your edits,</li> <li>6 Deploy the SlxClient portal.</li> <li>7 If necessary, repeat these steps to turn Password Self-service on for the Customer Portal.</li> </ol> <p><b>Note</b> 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>

## Configuring Optional Features

This section addresses steps for configuring optional features available in Infor CRM v8.4.

### Enabling Infor CRM Contour

<p><b>Web Client Contour - optional</b></p>	<p><b>81</b> Configure Infor CRM Contour</p> <p>The Infor CRM Contour feature enables integration with Microsoft Bing to view contacts or accounts geographically. Users can view contacts and accounts in a specific city or determine nearby contacts or accounts when meeting a contact or an account in a particular city in order to plan sales meetings. It also provides driving routes for a group of contacts or accounts in the same area.</p> <p>To make Contour available to users, the Administrator must enable and configure the Contour integration. This task is for implementing Contour for the first time. If your previous installation had enabled the Contour integration, you do not need to perform these steps.</p> <p><b>To implement Contour</b></p> <ol style="list-style-type: none"> <li>1 Obtain the API for Bing Maps, your map provider,</li> <li>2 Enable the Contour integration</li> <li>3 Configure your map provider API</li> <li>4 Grant permissions or roles to users</li> </ol> <p>For complete steps, see "Configuring Contour Integration" in the Infor CRM Web Client online help.</p>
<p><b>Web Client Contour - optional</b></p>	<p><b>82</b> Disable or update Contour integration with Google</p> <p>The Google Contour Integration is no longer supported for new integrations and has been hidden in the Infor CRM Integration Page. If your prior installation had enabled Contour using Google, no change is required and the feature will function as expected. However, if you are enabling Contour for the first time, you must do so using Bing. See task number 81.</p> <p>If you need to disable your Contour integration with Google, or update the Google key you must go to the database to make modifications.</p> <p><b>Disabling Google Contour Feature</b></p> <ol style="list-style-type: none"> <li>1 In the <b>Microsoft SQL Server Manager</b>, locate the table named <b>GeoCodeProviderConfiguration</b>.</li> <li>2 Update Enabled field to "F"</li> </ol> <p><b>Update Google Provider Key</b></p> <p>If any updates are needed to the Google provider key, use the following steps:</p> <ol style="list-style-type: none"> <li>1 In the <b>Microsoft SQL Server Manager</b>, locate the table named <b>GeoCodeProviderConfiguration</b></li> <li>2 Update the <b>APIKEY</b> to the new value as necessary.</li> </ol>

## Enable LinkedIn Integration (optional)

Required for	Task Description
Web Client (optional)	<p><b>83</b> Enable integration with the LinkedIn Sales Navigator (optional)</p> <p>Integration with the LinkedIn Sales Navigator enables Infor CRM users who have a LinkedIn membership and have subscribed to the LinkedIn Sales Navigator feature to see a widget of Sales Navigator in a tab on the Infor CRM Account, Contact, and Lead Detail views.</p> <p>In the Infor CRM Account Detail view, the Widget locates and displays other recommended leads, connections and news for the selected account available through your LinkedIn network.</p> <p>On the Contact and Lead detail views, the LinkedIn Sales Navigator tab displays the Icebreaker, Related Leads, and Get Introduced information.</p> <p>Integration with LinkedIn Sales Navigator is disabled by default.</p> <p><b>Note</b> If your installation included LinkedIn Sales Navigator prior to upgrading to Infor CRM v8.4, you do not need to request new Secret or API keys, or register with LinkedIn. Go to <a href="#">“Configuring LinkedIn Sales Navigator” on page 48</a>.</p> <p><b>Acquiring the API and Secret keys</b></p> <p>When Infor CRM is installed locally (on-premise), not in the cloud, you must request an API key and a Secret key from LinkedIn. This task is required for Infor CRM on premise customers only. Infor CRM Cloud customers do not need to perform the following task.</p> <p><b>To request the API key</b></p> <ol style="list-style-type: none"> <li>1 In your web browser, go to <a href="https://www.linkedin.com/developer/apps/new">https://www.linkedin.com/developer/apps/new</a>.</li> <li>2 If you are not logged into LinkedIn, a log in page will appear.</li> <li>3 After logging in, enter the following information: <ol style="list-style-type: none"> <li>a <b>Company Name:</b> &lt;Your company name&gt;.</li> <li>b <b>Name:</b> Type an intuitive name such as "LI for Infor CRM".</li> <li>c <b>Description:</b> Type a description for the integration such as "LinkedIn for Infor CRM Integration for &lt;your company name&gt;"</li> <li>d <b>Application Logo URL:</b> Optional &lt;URL for your company’s logo, which must be hosted using a secure (HTTPS) protocol&gt;.</li> <li>e <b>Application Use:</b> Sales (CRM), Marketing</li> <li>f <b>Website URL:</b> the URL for your Infor CRM On-Premise environment - You can copy and paste this URL from the browser bar when you are logged into Infor CRM.</li> <li>g <b>Business Email:</b> your company email address.</li> <li>h <b>Business Phone:</b> your company phone number.</li> <li>i Click <b>Submit</b>.</li> </ol> <p>A page displays containing the API key and Secret keys. Copy these values and paste them to a safe location. You will need them both to register your domain with LinkedIn and to configure your Infor CRM connection to LinkedIn.</p> </li> </ol>

Required for	Task Description
	<p><b>Task 83 - continued</b></p> <p><b>Registering with LinkedIn</b></p> <p>You must now send an email to <a href="mailto:lsssupport@linkedin.com">lsssupport@linkedin.com</a> containing the details of your API key so that your organization domain can be registered and approved for access to LinkedIn Sales Navigator. The email must contain the following:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Company/Organization</li> <li>• Role</li> <li>• Email Address</li> <li>• API Key</li> <li>• The URL you use to access Infor CRM. For example: <a href="http://web.address.com/SLXClient">http://web.address.com/SLXClient</a></li> </ul> <p>After receiving this information, LinkedIn LSS Support will enable the feature for your organization.</p> <p><b>Note</b> This may take 2-3 weeks</p> <p><b>Configuring LinkedIn Sales Navigator</b></p> <p>Complete the following tasks to configure the LinkedIn Sales Navigator integration.</p> <p><b>To configure</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b> as the <b>Administrator</b>.</li> <li>2 In the Navigation bar, expand <b>Administration, Integrations</b>.</li> <li>3 On the <b>Integrations</b> List view, select <b>LinkedIn Sales Navigator</b>.</li> <li>4 In the <b>LinkedIn Sales Navigator</b> Detail view, select the <b>Configuration</b> tab.</li> <li>5 In the <b>API Key</b> field, paste the API key you received from LinkedIn.</li> <li>6 In the <b>Secret</b> field, paste the Secret key you received from LinkedIn.</li> <li>7 Select the <b>Enabled</b> check box.</li> <li>8 Click <b>Save</b>.</li> </ol> <p><b>Sharing Information with Infor CRM users</b></p> <p>When installation and configuration are complete, your Infor CRM users can expect the following:</p> <ul style="list-style-type: none"> <li>• If the user is signed into LinkedIn, and the user clicks on the Infor CRM Account, Contact, or Lead details view Sales Navigator tab, then the Sales Navigator tab will populate using information about the account, contact, or lead displaying in the detail view.</li> <li>• If the user is not signed into LinkedIn and the user clicks on the Infor CRM Account, Contact, or Lead details view Sales Navigator tab, the LinkedIn sign in screen will appear.</li> <li>• The LinkedIn sign in screen will not display unless LinkedIn has accepted the request that you submitted to have your organization domain registered and approved for access to LinkedIn Sales Navigator.</li> </ul>

## Enabling Integration with Marketo

Marketo for the Infor CRM Web Client provides an integration between select versions of Infor CRM and Marketo, the world leader in Marketing automation.

When Marketo Integration is installed, Infor CRM users can leverage valuable marketing and activity-related data for leads and contacts that can assist with business solutions. Marketo Marketing data provides visibility into the types of promotional materials customers may respond to the most. Infor CRM users can use this data to assist with closing opportunities and determining the level of engagement of their leads.

The key features include:

- Two-way synchronization for Leads
- Two-way synchronization for Contacts
- One-way synchronization for Opportunities
- One-way synchronization for Accounts
- One-way synchronization for Users

When the Marketo Integration is installed and configured, Infor CRM users who have appropriate permissions can see a Sales Insight tab on the Infor CRM Contact, Lead, and Marketo Lead Detail views.

Marketo permits a maximum number of 150,000 API calls in one day. If that number is exceeded, the synchronization activities between Infor CRM and Marketo will fail.

Required for	Task Description
Marketo Integration	<p><b>84</b> Configure the Marketo Integration.</p> <p>If your organization will be using the Marketo integration, configure the integration to enable user access.</p> <p><b>To configure</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b> as the <b>Administrator</b>.</li> <li>2 In the Navigation bar, expand <b>Administration, Integrations</b>.</li> <li>3 On the <b>Integrations</b> List view, select <b>Marketo</b>.</li> <li>4 Select the <b>Enabled</b> check box.</li> <li>5 In the <b>Integration - Marketo</b> Detail view, select the <b>Options</b> tab and enter data in the following required fields: <ul style="list-style-type: none"> <li>• In the <b>URL</b> field, paste the API end point provided by Marketo.</li> <li>• In the <b>ClientID</b> field, paste the Client ID you received from Marketo.</li> <li>• In the <b>Secret</b> field, paste the Secret key you received from Marketo.</li> </ul> <p>The following fields are also available:</p> <ul style="list-style-type: none"> <li>• <b>MQL List Name</b> - Qualified leads</li> <li>• <b>AutoLink Accounts</b>: If set to true allows accounts to be automatically pushed to Marketo.</li> <li>• <b>AutoLinkOpportunities</b>: If set to true allows Opportunities to be automatically pushed to Marketo</li> <li>• <b>LeadChangePagingToken</b>: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work).</li> <li>• <b>ActivityPageToken</b>: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work).</li> <li>• <b>StaticListpageToken</b>: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work) - Does not apply for this release</li> </ul> </li> <li>6 Click <b>Save</b>.</li> </ol>

Required for	Task Description
Marketo Integration	<p><b>85</b> Run a Synchronization Cycle</p> <p>You must now run an Activity job to synchronize the default Marketo Activity types from Marketo to Infor CRM.</p> <p><b>To run the sync</b></p> <ol style="list-style-type: none"> <li>1 On the <b>Navigation Bar</b>, click <b>Administration</b>, and then click <b>Job Manager</b>.</li> <li>2 Click the <b>Definitions</b> tab.</li> <li>3 Scroll down to locate <b>Marketo - Execute Single Task</b>.</li> <li>4 Right click and click <b>Create Schedule</b>.</li> <li>5 In the <b>Run/Schedule Job</b> box, in the <b>Parameters</b> grid, double-click in the <b>Value</b> column next to <b>MarketoTaskToRun</b>, type the parameter <b>PullActivityTypes</b> and then click <b>OK</b>.</li> <li>6 When the Job has completed successfully, click <b>Close</b>.</li> </ol>
Marketo Integration	<p><b>86</b> Assign the Marketo Role to Users</p> <p>The Marketo Integration with Infor CRM adds a new role to Infor CRM. The new role is named Infor CRM-Marketo User and it adds new secured actions that control user access to the Marketo feature:</p> <ul style="list-style-type: none"> <li>• Entities/Account/DeleteFromMarketo – Allow deleting a promoted Marketo Account</li> <li>• Entities/Account/PromoteToMarketo – Allow promoting an Account to Marketo</li> <li>• Entities/MarketoLeads/View – Ability to view Marketo Leads</li> <li>• Entities/MarketoSessionLog/View – Ability to view the Marketo session logs under Administration</li> <li>• Entities/Opportunity/DeleteFromMarketo – Allows for the deletion of a Marketo Opportunity</li> <li>• Entities/Opportunity/PromoteToMarketo – Allows for promotion of an Opportunity to Marketo</li> <li>• Entities/User/DeleteFromMarketo – Allows for the deletion of a Marketo SalesPerson</li> <li>• Entities/UserPromoteToMarketo – Allows promotion of a User to Marketo .</li> </ul> <p>You must assign this new role to each user who will be assessing Marketo. For information about assigning roles to users, see the Infor CRM Web Client online help topic named <i>Roles Tab</i>.</p>

## Upgrading Infor CRM Xbar for Microsoft Outlook

Provide users with instructions for installing Xbar for Microsoft Outlook, and with their connection credentials.

Required for	Task Description
Infor CRM Xbar for Microsoft Outlook	<p><b>87</b> Enable users to install Infor CRM Xbar for Microsoft Outlook.</p> <p>Infor CRM Xbar for Microsoft Outlook must be installed on each user's machine. In most cases, the user performs the installation him or herself. To enable the installation to be successful, the Administrator must do the following:</p> <ul style="list-style-type: none"> <li>• Ensure users have the correct role. Each Xbar user must have been assigned the Standard User Role in the Core product. For information on assigning user roles, see the topic called "User Detail View" in the Web Client help.</li> <li>• Ensure each user who will be installing Infor CRM Xbar for Microsoft Outlook has Administrator rights for the computer where he or she will be performing the installation.</li> </ul>
Infor CRM Xbar for Microsoft Outlook	<p><b>88</b> Copy the Infor CRM Xbar Setup.exe set up files to the location where it can be accessed by your users.</p> <p>The Infor CRM Xbar Setup.exe is provided on the Infor CRM media. To make the install available, do the following:</p> <ul style="list-style-type: none"> <li>• Infor CRM Web Client users install Infor CRM Xbar from the Web Client Tools, Options, General tab, where there is an <b>Install Xbar for Outlook</b> button. To enable this button to function correctly you must copy the Infor CRM Xbar Setup.exe to C:\inetpub\wwwroot\SixClient\Libraries\DesktopIntegration.</li> <li>• Infor CRM Windows Network Client users must manually launch the setup.exe. Copy the Infor CRM Xbar Setup.exe to a convenient location and share that location with your Network Client users.</li> </ul>
Infor CRM Xbar for Microsoft Outlook	<p><b>89</b> Provide users with instructions for installing Xbar</p> <p>Provide your Infor CRM Web Client users with the following installation instructions:</p> <p><b>Infor CRM Web Client users</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b>, expand the <b>Tools</b> menu and then click <b>Options</b>.</li> <li>2 Click the <b>General</b> tab, and then click <b>Install Xbar for Outlook</b>.</li> <li>3 Follow the installation instructions on screen.</li> </ol> <p><b>Infor CRM Windows Client user</b></p> <ol style="list-style-type: none"> <li>1 Browse to the location provided by your Infor CRM Administrator and copy the <b>Infor CRM Xbar Setup.exe</b> to any convenient folder.</li> <li>2 Click <b>Infor CRM Xbar Setup.exe</b> , and then click <b>Install</b>.</li> </ol>

Required for	Task Description
Infor CRM Xbar for Microsoft Outlook	<p><b>90</b> Providing connection credentials</p> <p>Users will require connection strings, user names, and passwords to be able to successfully sign into Xbar. Share the following information with each of your Xbar users:</p> <ul style="list-style-type: none"> <li>• <b>User Name:</b> Type your username. This is the username you use to log on to the CRM Clients.</li> <li>• <b>Password:</b> Type your password. This is the password you use to log on to the CRM Clients.</li> <li>• <b>Service URL:</b> This is the URL for your SData portal. For example: <a href="http://web.address.com/Sdata">http://web.address.com/Sdata</a>.</li> <li>• <b>Client URL:</b> This is the URL for your Windows or Web Client. For example, <a href="http://web.address.com/SLXClient">http://web.address.com/SLXClient</a>.</li> </ul> <p>The first time Microsoft Outlook is opened after installing Infor CRM Xbar, each user will be invited to configure the Outlook Connector. Instruct users to follow the instructions in the Online Help topic provided.</p>

## Upgrading Infor CRM Back Office Extension (ICBOE)

These tasks assume that you are upgrading an existing Infor CRM Back Office Extension (ICBOE) implementation. If you are configuring the Infor CRM Back Office Extension integration for the first time, do not follow the steps in this section. Refer to the following documents instead:

- Infor CRM Implementation Guide (Infor CRM Implementation Guide.pdf)
- Infor CRM Back Office Extension Customization Guide (Infor CRM BOE Customization Guide.pdf)
- Infor CRM Back Office Extension Configuration Guide for Infor ION (Infor CRM Configuration Guide for Infor ION.pdf)

Infor CRM Back Office Extension features require that you have first installed Infor ION and configured connections using Infor ION Connect.



Back Office Integration is not supported for Windows Network Clients or for Remotes (Offline Web Clients, Remote Offices, or Remote Network Client users).

Required for	Task Description
Back Office Extension integration (ICBOE)	<p><b>91</b> Ensure that Infor CRM v8.4 has Multicurrency enabled. See the topic called “Managing Currency” in the Administrator help file for more information. The currency code must match your ERP base currency.</p>
Infor CRM Back Office Extension (ICBOE)	<p><b>92</b> If your implementation includes the Mobile Client, ensure you have enabled multi-currency on the Mobile Client as detailed in task <a href="#">38</a>.</p>
Infor CRM v8.3.0.6 and earlier	<p><b>93</b> Execute the Conversion Utility option named Perform BOD Mapping Migration.</p> <p>If you did not already do so in task 35, run the Conversion Utility option named <b>Perform BOD Mapping Migration</b> before installing the Infor CRM v8.4.0.0. BOD Packs.</p> <p>The AnyBOD conversion of BOD Field mappings for Infor CRM 8.3.0.7 and earlier is better able to identify actual customized BOD field mappings if this process is run prior to loading the new BOD field mappings from the new version of Infor CRM.</p>

Required for	Task Description
Infor CRM Back Office Extension (ICBOE)	<p><b>94</b> Upgrade the BOD pack bundles.</p> <p>BODS are Business Object Documents. They are the Infor ION messages that enable exchange of information between a supported ERP system and Infor CRM. Infor provides a BOD pack specific to each integration.</p> <p>For a full discussion of BODs, see the <i>Infor CRM Back Office Extension Configuration Guide</i> appendix called “BOD overview”.</p> <p><b>Note</b> When upgrading from an installation of Infor CRM v8.3.0.6 and earlier, execute the Conversion Utility prior to loading Infor CRM v8.4.0.0 BOD Packs. See task 35.</p> <p><b>To upgrade an existing BOD Pack bundle</b></p> <ol style="list-style-type: none"> <li>1 Download the version of the BOD pack bundle that matches your ERP system and save it to a convenient location. For example, if your ERP system is LN, use the BOD pack named Infor CRM VFS BOE BOD Pack LN 8.4.0.0.zip.</li> <li>2 Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.</li> <li>3 In the <b>Application Architect</b>, in the <b>Project Explorer</b>, right-click the project, and then click <b>Install Bundle</b>.</li> <li>4 Navigate to the folder where you copied the BOD Pack.zip, and then click <b>Open</b>.</li> <li>5 On the <b>Select Bundle</b> screen, click <b>Next</b>.</li> <li>6 On the <b>Select Items</b> screen, ensure the <b>Portals</b> option is selected.</li> <li>7 Click <b>Next</b>, and then click <b>Finish</b>.</li> </ol>
Infor CRM Back Office Extension (ICBOE)	<p><b>95</b> Add Infor CRM Back Office Extension (ICBOE) Roles to Users</p> <p>Infor CRM v8.3 contains default Roles for ICBOE functionality.</p> <ul style="list-style-type: none"> <li>• BackOffice: Allows add, edit, delete, and view permissions for back office integrations. You must assign those roles to your users.</li> <li>• Integration: Allows add, edit, delete, and view permissions for integrations.</li> <li>• Order and Quote Processor: Allows add and view permissions to contacts and accounts and add, edit, and delete permissions to sales orders.</li> </ul> <p>To enable users to access ICBOE functionality, you must assign each user with the appropriate role.</p> <p><b>To assign</b></p> <ol style="list-style-type: none"> <li>1 Sign in to <b>Infor CRM</b> as the administrator.</li> <li>2 In the <b>Nav bar</b>, click <b>ADMINISTRATION</b>.</li> <li>3 Select <b>Users</b>.</li> <li>4 In the <b>Users</b> list view, click the user who will be assigned a Back Office Role.</li> <li>5 In the <b>User</b> detail view, click <b>More Tabs</b>.</li> <li>6 In the <b>Tabs</b> pane, click <b>Roles</b>. The Roles pane will display any roles currently assigned to the selected user.</li> <li>7 In the <b>Roles</b> tab, click Add Role (the + button).</li> <li>8 Use the lookup to find and select roles to which you want to add the user.</li> <li>9 Click <b>Add Selected</b>.</li> <li>10 Click <b>Save</b>.</li> <li>11 Return to the <b>Users</b> list view and repeat steps 4 through 10 for each user who is to be assigned a Back Office Role.</li> </ol>

Required for	Task Description
Infor CRM Back Office Extension (ICBOE)	<p><b>96</b> If necessary, create and customize your own BODs using AnyBod</p> <p>For more information, see the documents called <i>Infor CRM Back Office Extension Configuration and Troubleshooting</i> and <i>Infor CRM Back Office Extension Configuration Guide for Infor ION</i>. Both documents are available in the Infor CRM Media and can be downloaded from infor Xtreme: <a href="http://www.infor.com/Inforxtreme">www.infor.com/Inforxtreme</a>.</p>
Infor CRM Back Office Extension (ICBOE)	<p><b>97</b> (Optional) Customizing your ICBOE configuration.</p> <p>If necessary, you can customize your ICBOE implementation. See the documents called <i>Infor CRM Back Office Extension Customization</i> and <i>Infor CRM Back Office Extension Configuration Guide for Infor ION</i>.</p>
Required for: Infor CRM v8.3 upgrade 02 or earlier.	<p><b>98</b> Republish Invoices</p> <p>If you are upgrading from Infor CRM v8.3.0.2 or earlier and you have an integration with an ERP system, you must republish invoices to address an issue where the required invoice due date is not captured.</p> <p>From the ERP host system, republish all Open or PartialPaid invoices to enable the new Invoice tab Days Late and Invoice Aging tab content is available.</p> <p>Steps vary by host ERP system. See your host ERP system administrator.</p>
Infor CRM Back Office Extension (ICBOE)	<p><b>99</b> Enable Normalized Base Currency.</p> <p>The Normalize Base Currency feature enables capturing transactions in varying currencies from multiple back offices or accounting entities and being able to report based on a single currency. It uses the base currency defined by Infor CRM.</p> <p>For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named <i>"Enabling the Normalize Base Currency Values custom setting"</i>.</p>
Infor CRM Back Office Extension (ICBOE)	<p><b>100</b> Enabling Permissions for Refresh Pricing</p> <p>The Refresh Pricing feature enables users with appropriate permissions to update pricing information on Sales Orders and Quotes that have not yet been promoted. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Refresh Pricing feature will not be available to users who have not been assigned permissions.</p> <p>You do not have to re-enable permissions for Refresh Pricing if you already enabled them during a previous version of Infor CRM.</p> <p><b>To assign Refresh Pricing permissions</b></p> <ol style="list-style-type: none"> <li>1 Sign into the <b>Infor CRM Web Client</b> as the <b>Administrative user</b>.</li> <li>2 In the <b>Navigation</b> bar, expand <b>ADMINISTRATION</b>, expand <b>Roles</b>, and select the role assigned to users who are to be given permissions to Promote.</li> <li>3 You may choose to create a new role or assign these permissions to an existing role, such as the Standard User role.</li> <li>4 Click the <b>Actions</b> tab.</li> <li>5 Click the Add (plus) button.</li> <li>6 In the <b>Lookup</b>, locate the secured action you want to assign <ul style="list-style-type: none"> <li>• For permissions to refresh pricing on <b>Quotes</b>, select <b>Entities/RePriceQuote</b>.</li> <li>• For permissions to refresh pricing on <b>Sales Orders</b>, select Double-click and then click <b>Close</b>.</li> </ul> </li> <li>7 Double-click and then click <b>Close</b>.</li> </ol>

Required for	Task Description
Infor CRM Back Office Extension (ICBOE)	<p><b>101 (Optional) Enable Master Data Consolidation</b></p> <p>This feature consolidates duplicate accounts with the same CustomerID, which can result when host systems such as ERP-M3, ERP-LX and ERP-Visual, submit data into a single Infor CRM account record. This applies to Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Products, and Persons.</p> <ul style="list-style-type: none"> <li>• This feature is off by default until you select the Master Data Consolidation option when running the Conversion Utility..</li> <li>• Once Master Data Consolidation has been enabled, you cannot roll back the converted data.</li> <li>• Bi-directional Quote and Sales Order functionality is not supported with consolidated master data content enabled</li> </ul> <p>If your environment does not already contain pre-existing data from an ERP system, you can enable Master Data Consolidation from the Infor CRM Web Client.</p> <p><b>To enable</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b> as <b>Administrator</b>.</li> <li>2 Expand <b>Integration, Integrations</b>.</li> <li>3 In the List view, select <b>Back Office Extension</b>.</li> <li>4 In the Detail view, on the <b>Options</b> tab, scroll to the bottom of the grid to locate <b>Master Data Consolidation</b>.</li> <li>5 Double-click in the <b>Value</b> column and change False to <b>True</b>.</li> <li>6 Click the Save Icon.</li> </ol> <p>If you are upgrading an environment that contains pre-existing data duplicates, and you did not run Master Data Consolidation in task 35, you may do so at any time.</p> <p><b>To consolidate existing data</b></p> <ol style="list-style-type: none"> <li>1 On the machine where Infor CRM Admin Tools is installed, browse locate the <b>Execute ConversionUtility_8.4.exe</b>. This is typically "C:\Program Files (x86)\Saleslogix"</li> <li>2 Select <b>Master Data Consolidation</b>. <ul style="list-style-type: none"> <li>• To consolidate existing data content</li> <li>• To enable Back Office Extension Master Data Consolidation option.</li> </ul> <p>Be sure that all other options in the Conversion Utility are not selected.</p> </li> <li>3 Click <b>Update</b>.</li> </ol>

Required for	Task Description
Infor CRM Back Office Extension (ICBOE)	<p><b>102 Enabling System of Record</b></p> <p>You do not have to re-enable System of Record if you already enabled it during a previous update.</p> <p>Infor CRM Web Model Update 02 for v8.3 added the ability to enable Infor CRM as the System of Record. If your installation includes an integration with a supported ERP system and you want to enable Infor CRM as the System of Record, you must enable the feature. System of Record is disabled by default.</p> <p>These instructions assume that Infor CRM Back Office Extension is already configured in your environment. This includes configuration with Infor ION and a supported ERP system.</p> <p><b>To enable</b></p> <ol style="list-style-type: none"> <li>1 Sign into the <b>Infor CRM Web Client</b> as the <b>Administrator</b>.</li> <li>2 On the <b>Integrations</b> List view, click <b>Back Office Extension</b>, and click the <b>Options</b> tab.</li> <li>3 Set the <b>Tenant</b> and the <b>Logical ID</b>.</li> <li>4 The Tenant and the Logical ID fields contain the same values as those used in the Infor ION Connection point defined for Infor CRM. If you do not have these values, contact your ION Administrator.</li> <li>5 Click <b>Save</b>.</li> <li>6 While still in the <b>Back Office Extension</b> Detail view, click the <b>Back Offices</b> tab.</li> <li>7 In the grid, locate and click <b>InforCRM SOR</b>.</li> <li>8 In the <b>Back Office - InforCRM SOR</b> Detail view, set the <b>Logical ID</b>. This is the Infor CRM Logical ID and is the same value used to set the Logical ID in step 3 above.</li> <li>9 Select the <b>Active</b> check box and then click <b>Save</b>.</li> </ol> <p>You must now provide the appropriate users with permissions to Promote Opportunity records from Infor CRM.</p> <p><b>Enabling Permissions for Promote</b></p> <p>When Infor CRM is enabled as system of record, users with appropriate permissions will have the ability to promote selected record types to the ERP system. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Promote feature will not be available to users who have not been assigned permissions.</p> <p><b>To assign Promote permissions</b></p> <ol style="list-style-type: none"> <li>1 Sign into the <b>Infor CRM Web Client</b> as the <b>Administrative user</b>.</li> <li>2 In the <b>Navigation</b> bar, expand <b>ADMINISTRATION</b>, expand <b>Roles</b>, and select the role assigned to users who are to be given permissions to Promote.</li> <li>3 You may choose to create a new role or assign these permissions to an existing role, such as the Standard Use role.</li> <li>4 Click the <b>Actions</b> tab.</li> <li>5 Click the Add (plus) button.</li> <li>6 In the <b>Lookup</b>, locate <b>Entities/Promote</b>.</li> <li>7 Double-click and then click <b>Close</b>.</li> </ol>

Required for	Task Description
	<p><b>103 Configuring Price and Availability</b></p> <p>If your Infor CRM installation includes the Back Office Extension feature, the following steps are required to configure Price and Availability.</p> <p>You do not have to reconfigure Price and Availability if you already configured it during a previous update.</p> <p><b>Modifying the content of the Location field</b></p> <p>Modify the content of the Location field using information provided by the administrator for your supported ERP system. This is typically the Warehouse ID, Office ID, or Site ID as defined in the ERP system. This field is only used in publishing new transactions.</p> <p><b>To modify</b></p> <ol style="list-style-type: none"> <li>1 Sign in to Infor CRM as Administrator.</li> <li>2 In the Navigation Bar, expand <b>Administration, Integrations</b>.</li> <li>3 Click <b>Back Office Extension</b>.</li> <li>4 In the <b>Back Office Extension</b> detail view, click the <b>Back Offices</b> tab.</li> <li>5 Click to select your Back Office.</li> <li>6 In the <b>Back Office Detail</b> view, in the <b>Accounting Entities</b> tab, click <b>Edit</b>.</li> <li>7 In the <b>Location</b> box, type the <b>Location</b> information provided by your ERP system administrator.</li> </ol> <p><b>Adding the End Point URL for the Back Office Price Services</b></p> <p>For the Back Office Price services to communicate correctly with the ERP, you must add the unique End Point URL for each Back Office Price service supported by your ERP. Contact your ERP Administrator for these Back Office URL.</p> <p>Some back offices also require a user name and password. Your ERP Administrator can also provide this information.</p> <p><b>To modify</b></p> <ol style="list-style-type: none"> <li>1 Sign in to Infor CRM as Administrator.</li> <li>2 In the Navigation Bar, expand <b>Administration, Integrations</b>.</li> <li>3 Click <b>Back Office Extension</b>.</li> <li>4 In the <b>Back Office Extension</b> detail view, click the <b>Back Offices</b> tab</li> <li>5 Click to select your Back Office.</li> <li>6 In the <b>Back Office Detail</b> view, in the <b>Price Services</b> tab, select the Price Service you want to edit.</li> <li>7 In the <b>Price Service Detail</b> view, in the <b>End Point</b> field, copy and paste the End Point URL that matches the Price</li> <li>8 Service in the ERP.</li> <li>9 This is the End Point URL provided by your ERP Administrator.</li> <li>10 If necessary, enter the <b>User name</b> and <b>Password</b>.</li> <li>11 This is the User name and Password provided by your ERP Administrator</li> <li>12 Repeat steps <b>6</b> and <b>7</b> for each Price Service listed for your ERP.</li> </ol>

Required for	Task Description
Infor CRM Back Office Extension (ICBOE)	<p><b>Update the ION Connection Point and Document Flows</b></p> <p>ProcessQuote and ProcessSalesOrders must be added to the ION Connection Point and Document flow to the host ERP system to receive this information from Infor CRM.</p> <p>For instructions on updating ION Connection points and Document flows, see the Infor CRM BOE Customization Guide.pdf. This document is available in your Infor CRM v8.3 installation media, or from Infor Xtreme at <a href="http://www.inforxtreme.com">www.inforxtreme.com</a>.</p> <p><b>Confirm necessary BOD Mapping Outbound triggers are enabled</b></p> <p>These triggers must be enabled on any entity that is bi-directional, for Infor CRM to publish BODs to your host ERP system. The default setting on entities that are not bidirectional is off.</p> <p>See the Systems Integration Guide for your ERP for a full list of required triggers</p> <p><b>To modify</b></p> <ol style="list-style-type: none"> <li>1 Sign in to Infor CRM as Administrator.</li> <li>2 In the Navigation Bar, expand <b>Administration, Integrations</b>.</li> <li>3 Click <b>Back Office Extension</b>.</li> <li>4 In the <b>Back Office Extension</b> detail view, click the <b>Back Offices</b> tab.</li> <li>5 Click to select your Back Office.</li> <li>6 In the <b>Back Office Detail</b> view, in the <b>BOD Mappings</b> tab, review the settings in the following columns for each mapping: <ul style="list-style-type: none"> <li>• Outbound on Create Enables creating new records in CRM and promoting them to the host system.</li> <li>• Outbound on Update Enables modifying promoted records and publishing changes to the host system.</li> <li>• Outbound on Delete (optional) Enables the Delete button on the Detail view tabs, which enables users to delete Product lines in Quotes and Sales Orders. Note that it also enables the Delete button on the Detail view, which enables users to delete the entire Sales Order or Quote.</li> </ul> </li> <li>7 If the settings do not match the settings specified in Systems Integration Guide for your ERP, select the Mapping to open the BOD Mapping Detail view and edit the setting using the pick list for each trigger.</li> </ol>

## Enabling integration with Infor Configure Price Quote (CPQ)

These tasks assume that you already have Infor Configure Price Quote installed and configured in your environment. For more information, see the Infor documentation that accompanied CPQ.

Required for	Task Description
	<p><b>104</b> (Optional) Enable Infor CRM Sales Orders and Quotes to use Infor Configure Price Quote (CPQ).</p> <p>Infor CPQ provides a visual, rules-based configurator software that integrates with Infor CRM to accelerate product configuration, pricing and quoting. The connection to Infor CPQ is available in Infor CRM. You must enable the configuration and then create the configuration groups that will provide the correct components. For additional information about configuring Infor CPQ, see the Web Client online Help topic called <i>Infor CPQ Overview</i>.</p> <p><b>To enable</b></p> <ol style="list-style-type: none"> <li>1 Sign in to the <b>Infor CRM Web Client</b> as <b>Administrator</b>.</li> <li>2 In the Navigation Bar, expand <b>Administration</b> and then click <b>Integrations</b>.</li> <li>3 In the <b>Integrations List View</b>, click <b>Infor CPQ</b>.</li> <li>4 In the <b>Integration - Infor CPQ</b> detail view, The integration boxes will be autofilled by default.</li> <li>5 <b>Enabled</b> check box and then click <b>Save</b>.</li> <li>6 Select the <b>Configuration Group</b> tab and then click <b>Add Configuration</b> (plus icon).</li> <li>7 In the <b>Add Configuration Group</b> window, type the information that will connect Infor CRM to the product information in the product configurator. If you do not have this information, contact your CPQ administrator: <ul style="list-style-type: none"> <li>• <b>Application Name:</b> The application name registered in the Product Configuration Manager Enterprise Manager. It is a combination of the configuration model and the output database. For example: InforCRM_DB.</li> <li>• <b>Config Group Name:</b> Type the intuitive name of your choice.</li> <li>• <b>Description:</b> A description of the group.</li> <li>• <b>Instance Name:</b> The instance ID that identifies your database instance. For example, InforCRM_DB. A single server can host several instances of PCM Configurator.</li> <li>• <b>Name Space:</b> The namespace of the product configurator model as defined in PCM Design Studio.</li> <li>• <b>Ruleset Name:</b> This is the name of the Product Configuration Model as defined in PCM Design Studio. For example, if the product being designed is a bicycle, the Ruleset name assigned might be "Bike".</li> <li>• <b>Service URL:</b> The URL for the Integration Web Service.</li> <li>• <b>API Key:</b> The key used to identify the tenant connection to the API. This key can be acquired by the tenant administrator through the PCM Home page. Keep this key private.</li> </ul> </li> <li>8 Click <b>Test link</b>.</li> <li>9 If the test status is successful, click <b>OK</b>.</li> <li>10 Repeat steps to <b>6</b> though <b>9</b> for each group you need to add.</li> </ol>

## Enabling integration with Infor Ming.le

Required for	Task Description
Infor Ming.le	<p><b>105</b> (Optional) Integrate with Infor Ming.le</p> <p>For steps to integrate Infor CRM v8.4 with Ming.le, see the following documents:</p> <ul style="list-style-type: none"> <li>Integrating Infor CRM with Infor Mingle_cloud.pdf</li> <li>Integrating Infor CRM with Infor Mingle_on-premises.pdf.</li> </ul> <p>Both documents are available in the Infor CRM v8.4 media.</p>
	<p><b>106</b> (Optional) Enabling CPQ Enterprise Quoting</p> <p>The implementation of the Infor CPQ Enterprise Quoting user interface as the Infor CRM Quote user interface requires:</p> <ul style="list-style-type: none"> <li>Infor CPQ Configurator implemented and configured. See task 104.</li> <li>Infor CPQ Enterprise Quoting integration configuration parameters and endpoint defined in the Infor CRM, Infor CPQ integration form EQ Configuration tab.</li> <li>EQ BOD Pack loaded and configured with the corresponding ION Connection Point Logical ID.</li> <li>Infor CRM Master Data Consolidation option enabled. See task 101.</li> </ul> <p><b>To enable CPQ-Enterprise Quote user interface:</b></p> <ol style="list-style-type: none"> <li>Provision Infor CRM in a common Infor Ming.le tenant with Infor CPQ Enterprise Quoting</li> <li>Sign in to the <b>Infor CRM Web Client</b> as <b>Administrator</b>.</li> <li>In the <b>Integrations List View</b>, click <b>Infor CPQ</b>.</li> <li>In the <b>Integration - Infor CPQ</b> detail view, the integration boxes will be autofilled by default.</li> <li>Update the EQ Configuration tab content using on the implementation settings of CPQ Enterprise Quoting.</li> <li>Update the <b>Configuration Group</b> tab with the CPQ configurator integration parameters.</li> <li>On the <b>Infor CPQ integration Detail</b> view, select the <b>Enabled</b> check box.</li> <li>Click <b>Save</b>.</li> <li>Update the <b>Infor EQ Back Office Logical ID</b>.</li> <li>If you have not already run the conversion utility to enable the Master Data Consolidation integration to convert the pre-existing data, do so using the steps in task 101.</li> </ol>

## Next Steps

You have completed the upgrade to Infor CRM v8.4. For more information about the changes in this release:

- See [Chapter 2, “Changes in this release” on page 61](#) 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 67](#) for information about the plugin changes in this release.

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# Chapter 2

## Changes in this release



This chapter lists all of the changes to Infor CRM since version 8.3. 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 [\[Breaking Change\]](#).

In addition to improved product stability due to defect fixes, v8.4, contains the following new functionality.

### General enhancements

- Desktop Integration has been separated into Office Integration and Outlook Integration. Outlook Integration is now part of Infor CRM Xbar for Microsoft Outlook. Both can be downloaded by users from the Web Client Tools, General tab.
- The service used for integration is now run as a job through the Job Manager. The SData Synchronization Server is no longer required.
- [\[Breaking Change\]](#). In version 8.4, screen readers are not compatible with Chrome. Use Internet Explorer.
- The Remote Sales Client deployment now includes SData configuration.
- IIS configuration now supports versions of IIS above version 8.
- SData portal performance has been enhanced.
- Field level security information can now be queried and returned through SData.
- Web Client Job Server clustering allows load sharing across multiple machines or multiple nodes on the same machine and to monitor Job Server statistics using SData or Windows Performance Counters.
- Users with appropriate permissions can now remove bad records from the Sync Digest table.
- New CreateUnicodeDB.exe tool enables converting an ANSI database to a Unicode database. The converted database will be approximately double the size of the existing database and the tool requires three times the size of the existing database to be able to run correctly. After converting, you must pipe log information to a file. See task 29 for details.

### Web Client enhancements

- There are now separate options for setting language and regional formats. The new Regional Formats option determines date, time, number, and currency formats.
- Account Hierarchy provides the following:
  - The ability to view a hierarchy view of the parent and all children and grandchildren of an account from the Account detail view.
  - Access to a quick view of frequently used entities (contacts, opportunities, sales orders and activities).

- The error message "Mail details to your administrator" link now opens an e-mail message that can be sent to an e-mail address defined by the administrator.
- The Administrator can configure certain pick lists to support multiple languages. When configuration is complete, users can select a language on the Contact Detail view Details tab that will change the list items in the Prefix, Suffix, and Title pick lists for a particular contact.
- When adding a new account, it is now possible to look for potential matching records.
- When moving a contact, there is a new option to assign all items to the same contact.
- Showing groups has been replaced by group Favorites. Favorites determine which groups display as tabs on list and detail views.
- Export to File and Export to Excel have been combined and renamed "Export" in the Common Tasks pane and from the right-click menu.
- Export performance has been improved by including a limit to the number of records to be exported and adding the ability to turn off exporting pivot tables to Microsoft Excel.
- The new Sales Intelligence feature includes the ability to view the likelihood that a contact or account will make a purchase and provides a Recommendations tab that recommends products the contact or account is likely to purchase in the next 30 days.
- Completed meetings now display contact and account information on the Calendar.
- Contour integration provides the ability to map contact and account addresses in order to view contacts and accounts that are near one another. You can also add places that are not contacts or accounts, such as a hotel or airport.
- The Account detail view Sales Order tab includes additional information.
- The Local Pricing feature allows you to choose, on a per entity basis, between the ERP Pricing Service or local Infor CRM pricing which allows users to modify product pricing and discount amounts in Infor CRM. Using local pricing is only recommended for entities that are not synchronized to an ERP system.
- Creating an ad hoc group with a large number of records now uses the Job Manager.
- Improvements to Reporting performance.
- New common task on the Group Manager view to determine which groups will be marked as Favorites by default for new users.
- Integration with the LinkedIn Sales Navigator enables Infor CRM users who have a LinkedIn membership and have subscribed to the LinkedIn Sales Navigator feature to see a widget of Sales Navigator in a tab on the Infor CRM Account, Contact, and Lead Detail views.
  - In the Infor CRM Account Detail view, the Widget locates and displays other recommended leads, connections and news for the selected account available through your LinkedIn network.
  - On the Contact and Lead detail views, the LinkedIn Sales Navigator tab displays the Icebreaker, Related Leads, and Get Introduced information.
- (Breaking change) Online help must now be accessed from Infor's Docs.infor.com site. It is no longer possible to install customized help in your local environment.
- (Breaking change) Outlook Integration and Outlook Sync are now provided with Infor CRM Xbar and must be downloaded separately from Infor CRM v8.4.
- The version of Contour provided with Infor CRM v8.4 is compatible with Microsoft Bing. If your installation includes a version of Contour provided in Infor CRM v8.3 Update 03 or later, your Contour integration with Google will still function, however it is no longer visible in the UI. For more information see Upgrade Workplan task 82.

## Back Office Integration enhancements

The following improvements are available for implementations that include Back Office Extension integration with a supported ERP system:

- Infor CRM can now be set to function as the authoritative system of record for Opportunities in an integration between Infor CRM and a supported ERP system through Infor ION.
- Normalize Base Currency provides an option to store data published by an ERP in terms of the Infor CRM base currency. This allows customers who opt for this service, to work in Infor CRM using the Infor CRM base currency even though the integrated back office ERP system uses a different base currency.

- ION Workflow enables Infor CRM users to initiate a workflow defined in ION from within Infor CRM. The trigger can be defined as conditional or manual in Infor CRM and the trigger can be extended to other entities.
- Discrete Address provides the option to use a discrete type of address if it is passed from an integrated back office ERP system.
- New logging and exception handling for Price and Availability in the Infor CRM Web Client.
- Master Data Consolidation is an optional feature that:
  - Consolidates duplicate accounts with the same CustomerID, which can result from host systems such as ERP-M3, ERP-LX and ERP-Visual, into a single Infor CRM account record. This applies to Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Persons, and Products.



You must execute the \*Master Data Consolidation\* conversion option in the Conversion Utility if your implementation contains pre-existing ERP data content.

- Adds a filter icon and logic for each of the integrated transactional master data tabs; Account Quotes tab, Account Sales Orders tab, Account Shipments tab, Account Invoices tab, Account Receivables tab, Account Returns tab, Ship To Sales Orders tab, Ship To Shipments tab, Ship To Invoices tab, Ship To Receivables tab, Ship To Returns tab, Bill To Sales Orders, Bill To Invoices, Bill To Receivables and Bill To Returns. The new tab filter control supports filtering the tab content by Accounting Entity and/or by ERP Status. If the ERP integration is later disabled, the Quote and Sales Order filters revert to showing the Infor CRM status.
- The Local Pricing feature allows you to choose, on a per entity basis, between the ERP Pricing Service or local Infor CRM pricing which allows users to modify product pricing and discount amounts in Infor CRM. Using local pricing is only recommended for entities that are not synchronized to an ERP system.
- Improvements for customizing and upgrading customized BOD mappings and BOD field mappings which previously could not be upgraded.
- A new Language Code option for supporting integrated content in a localized environment.
- The Account Invoice Aging tab provides summarized past due invoice aging content. All host ERP invoices with past due payment due dates and an ERP status of Open or PartialPaid are included in the summary values presented in the new Account Invoice Aging tab.



Content is dependent upon the Infor CRM instance being integrated to a back office host ERP system publishing invoice content.

- The Account Invoices tab contains a new Days Late column, enabling users to see past due invoices for a given account.
- Users can now refresh pricing for sales orders and quotes when using a price service.



Access to this feature must be granted to users. For more information, see the Web Client online help topic "Enabling Refresh Pricing".

- New Test Link button on the Price Service detail view enables testing the price and availability end points.
- The Account Detail View ERP Details tab now contains a notes field which displays notes published by the host ERP system. Notes display in descending date sequence. This field is read-only.

## Ming.le Integration enhancements

For implementations that include integration with Infor Ming.le:

- The following new Ming.le Widgets are available:
  - Infor Ming.le Funnel Chart widget.
  - Infor Ming.le Top Prospects widget is a list of my prospective accounts.
  - Infor Ming.le Infor CRM Opportunities widget of associated quotes for each opportunity.
  - Infor Ming.le Infor CRM Contracts widget which provides a detailed view of the contract and associated contacts.
  - A new Dashboard widget for Group Lists (Infor.CRM.GroupList -v1.0.6.3.zip)
  - A new Dashboard widget for Opportunity Status (CRM.opportunity.Status.zip) is available.

- A new tool simplifies the Infor Ming.le provisioning process.
- An updated WebProvisioningUI.exe adds provisioning information to the Virtual File System (VFS).
- Users and roles are now synchronized between Infor CRM and Infor Ming.le.
- It is possible to share records and notes and history items
- It is possible to create and manage bookmarks
- Links in Infor Ming.le link to Infor CRM.

## Web Client Administrator enhancements

Administrators and users with appropriate roles can access the following new features and functionality:

- The following roles are now default permissions in the Admin User Role. In prior releases, they were not assigned to a Role and had to be manually added: Pick Lists, Users, Roles, A/C/I, Departments, Exchange Rate, Lead Source, Literature, Resource, Standard Problem, Standard Resolution, Security Manager, Ticket Activity, Ticket Area Owner, Qualification, Package, Office Profile, Country Code Mappings, Competitor, Campaign, Entity Manager.
- Create multi-regional pick lists with different list items for each language. The contents of a multi-regional pick list will depend upon the user's language setting.
- Set a default language for multi-regional pick lists.
- Set the desired language on the Name Prefix and Name Suffix so that users can select a language on the Contact Detail view Details tab in order to change the list items in the Prefix and Suffix, pick lists.
- A new Office Profile Error Notifications tab allows enabling the Error message e-mail link feature and specifying one or more e-mail addresses that will automatically populate the email To: field.  
When the Error message e-mail link feature is enabled, users who encounter an error message can send an e-mail to the specified address that contains a link that will display Event Viewer information.  
The Event Viewer information is only available to administrators or users granted access to the ErrorLookupService/View secured action.
- New secured action for Account Hierarchy - Entities/Account/Hierarchy.
- New secured actions for the Job Manager job schedules and triggers.
- Steps for configuring Sales Intelligence, including the displaying the purchase likelihood score options.
- New Custom Settings list view and Custom Settings detail view to manage group export settings, CreatePivot and MaxExportRecords.
- New Office Profile Groups tab that allows you to set a limit for the number of groups that can display as tabs on list and detail views. All standard groups will be marked as Favorites by default.
- New Adminutil.exe enables the Administrator to see which users are logged in to Infor CRM and how many times each user is logged into the various Infor CRM applications. Administrators can filter based on type of user and status. It does not track SData logins.

## Mobile enhancements

The following enhancements have been added to the Infor CRM Mobile Client since version 3.4.

- Two new files: configuration/development.default.js and configuration/production.default.js enable preserving modifications to default settings (such as Enable Multi-currency) in future upgrades.
- Field level security settings made for the Infor CRM Web Client using the Infor CRM Web Administrator now cascade into the Mobile Client.
- Infor CRM Mobile can now use the 24-hour clock. Settings enable the user to manually change between the 12 and 24 hour clocks. The default setting is specified by regional settings.
- Settings contains two new Offline options: users can clear their Briefcase and clear Recently Viewed records as well as clearing all records and showing record usage.
- Integrations with ERP LX support "Availability to Promise" in Mobile. "Click to check warehouse availability" enables users to verify if the warehouse selected has the requested volume of inventory on hand.
- Users can look up Contacts based on the Accounts to which they were associated.

## Changes in this release

- The Infor CRM Mobile Client supports single sign-on when Infor CRM is integrated with Infor Ming.le.
- Contour enables searching the Infor CRM database for other accounts that are in a specific geographical proximity.
- The Infor CRM Back Office Extension (ICBOE) feature contains the following improvements in the Infor CRM Mobile Client:
  - ICBOE is now part of the Infor CRM Mobile Client. It is no longer necessary to install a separate bundle. ICBOE for the Infor CRM Mobile Client enables Mobile Client users to drill through account-related information available in back office integration. When ICBOE is configured in the Infor CRM Web Client, users can see the following entities in Infor CRM for Mobile:
    - Invoices
    - Quotes
    - Sales Orders
    - Shipments
    - Receivables
  - The Working Offline “Recently viewed” and “My Briefcase” features are now available for ICBOE records.
  - The ICBOE feature in Infor CRM Mobile no longer needs to be activated in the Application Architect.

Changes in this release

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# Chapter 3

## Plugin changes in this release



In addition to the new functionality described in [Chapter 2, “Changes in this release”](#), Infor CRM 8.4 fixes product defects, including defects previously addressed in Infor CRM v8.3 Updates.

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 Schema

### New Entities

Entity	Purpose	8.3.x	8.4
ACCOUNTACCOUNTINGENTITY	Supports master data consolidation of duplicate account records when integrated with an ERP system.	08	
BACKOFFICEACCTENTITY	Supports master data consolidation of duplicate accounts when integrated with an ERP system.	08	
BULKUPDATETRACKER	Stores information about bulk updates, tracking the records that are processed during the bulk update process		8.4
CONTACTACCOUNTINGENTITY	Supports master data consolidation of duplicate contact records when integrated with an ERP system.	08	
ERPBILLTOACCOUNTINGENTITY	Supports master data consolidation of duplicate bill-to records when integrated with an ERP system.	08	
ERPPAYFROMACCOUNTINGENTITY	Supports master data consolidation of duplicate pay from records when integrated with an ERP system.	08	
ERPPERSONACCOUNTINGENTITY	Supports master data consolidation of duplicate ERP person records when integrated with an ERP system.	09	
ERPSHIPTOACCOUNTINGENTITY	Supports master data consolidation of duplicate accounts when integrated with an ERP system.	08	
GEOCODEPROVIDERCONFIGURATION	Stores the configuration information for the geocode provider used for the Contour mapping feature.	04	
IONWORKFLOW	Supports ION Workflow which enables initiating a workflow defined in ION from within Infor CRM.	08	
IONWORKFLOWDEFINITION	Supports ION Workflow which enables initiating a workflow defined in ION from within Infor CRM.	08	
IONWORKFLOWMAPPING	Supports ION Workflow which enables initiating a workflow defined in ION from within Infor CRM.	08	
MARKETOACTIVITYTYPE	Supports Marketo: provides the various activity types from Marketo such as open email.		8.4
MARKETOENTITYMAP	Supports Marketo: allows the user to map entities from Marketo as well as create new mapped fields from Infor CRM to Marketo.		8.4
MARKETOFIELD	Reserved for future user by Marketo.		8.4
MARKETOLEAD	Supports Marketo provides all Marketo leads.		8.4
MARKETOLEADACTIVITY	Supports Marketo: provides the various activity data from the Marketo feature.		8.4
MARKETOLIST	Supports Marketo: provides a list of all Marketo leads.		8.4
MARKETOLOGERROR	Supports Marketo: assists in managing error logging.		8.4
MARKETOMAPFIELD	Supports Marketo: is used for the admin to map a specific entity from Infor CRM to Marketo.		8.4
MARKETOSALESPERSON	Supports Marketo: is used to promote a new user to Marketo.		8.4
MARKETOSESSIONLOG	Supports Marketo: is used to show the admin a view of all sync records assists in seeing possible errors or skipped records.		8.4

## Plugin changes in this release

Entity	Purpose	8.3.x	8.4
OPPORTUNITYSUBITEM	Stores configuration information for the Configure Price Quote (CPQ) feature.		
PERIOD	Stores information about exchange rate periods for the dated exchange rates feature.		8.4
PRODUCTACCOUNTINGENTITY	Supports master data consolidation of duplicate accounts when integrated with an ERP system.	08	
PROVIDER	Stores information from the source from which exchange rates are downloaded.		8.4
SICUSTOMER	Stores the customer information for the Sales Intelligence feature.	06	
SIRATIONALE	Stores the customer purchase rationale information for the Sales Intelligence feature.	06	
SIRECOMMENDATION	Stores the customer product recommendations information for the Sales Intelligence feature.	06	

## New Properties

Entity	Property	Description	Read Only	8.3 .x	8.4
ACCOUNT	AlternateKeyPrefix	The first part of the pretty key for the Account. Based on the sitecode for office.		03	
ACCOUNT	AlternateKeySuffix	The last part of the pretty key for the Account. Based on the Account ID.		03	
ACCOUNT	ErpNotes	Notes synced from the integrated Back Office.		06	
ACCOUNT	IsNormalized	Supports the Normalized Base Currency feature. InforCRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
ACCOUNT	MarketoStatus	Supports Marketo: provides an update regarding whether the record has been successfully linked to Marketo.			8.4
ACCOUNT	MarketoOperation	Supports Marketo Operation.			8.4
ACCOUNT	Marketold	Supports Marketo: provides the Marketo ID once an account has been synced.			8.4
ACCOUNT	MarketoSyncMessage	Supports Marketo: provides a message indicating that a record has been successfully synced to Marketo. Provides date time of sync			8.4
ACCOUNT	MarketoLastAction	Supports Marketo: provides the last sync action, for instance insert or update to Marketo			8.4

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
ACCOUNTACCOUNTING ENTITY	CurrencyCode	Accounting Entity specific ERP base currency for the account.			8.4
ACCOUNTACCOUNTING ENTITY	ErpDefaultWarehouseId	Accounting Entity specific default warehouse for the account.			8.4
ACCOUNTACCOUNTING ENTITY	ErpPaymentMethod	Accounting Entity specific payment method for the account.			8.4
ACCOUNTACCOUNTING ENTITY	ErpTaxId	Accounting Entity specific tax ID for the account.			8.4
ACCOUNTACCOUNTING ENTITY	FinanceLimit	Accounting Entity specific finance or credit limit for the account.			8.4
ACCOUNTACCOUNTING ENTITY	IsDefault	A True/False value that identifies the default accounting entity.		08	
ADDRESS	GeocodeProvider	Supports Contour		04	
ADDRESS	GeocodeLongitude	Supports Contour: provides the longitude for the address when mapping an address field.		04	
ADDRESS	GeocodeLatitude	Supports Contour: provides the latitude for the address when mapping an address field.		04	
ADDRESS	GeocodeFailed	Supports Contour: provides the ability to determine if the geocoding fails on the address.		04	
BACKOFFICE	LanguageAttribute	The default language for the account.		08	
BODFIELDMAPPING	STDBODFieldMappingID	The ID for the standard BOD field mapping.		03	
BODFIELDMAPPING	SearchClause	Picklist based property used to support AND/OR logic when two or more BOD field mappings are enabled to be included in the auto dup/merge process when the integration is operating as the system of record for the corresponding CRM entity.		03	
BODFIELDMAPPING	IncludeInSearch	Boolean property indicating the content referenced by the BOD field mapping should be included in the auto dup/merge process of the integration when operating as the system of record for the corresponding CRM entity		03	
BODFIELDMAPPING	BackOfficeId	Foreign key reference to BackOffice		08	
BODFIELDMAPPING	IsExtension	A True/False value that indicates that the entity is an extension of another bodfieldmapping entity		08	
BODMAPPING	OutboundOnCreate	Enum value defining the trigger condition for generating request to create new records in the ERP system. 'D' = Disabled; 'A' = Automatic; 'U' = User		03	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
BODMAPPING	OutboundOnUpdate	Enum value defining the trigger condition for generating request to update records in the ERP system. 'D' = Disabled; 'A' = Automatic; 'U' =		03	
BODMAPPING	OutboundOnDelete	Enum value defining the trigger condition for generating request to delete records in the ERP system. 'D' = Disabled; 'A' = Automatic; 'U' = User triggered via the tasklet link for the entity		03	
BODMAPPING	STDBODMappingId	Reference ID for customized BOD Mapping records providing the back link to the original BOD mapping record		03	
BODMAPPING	SystemOfRecord	Determines whether Infor CRM of the integrated ERP is functioning as the System of Record..		03	
BODMAPPING	SyncTemplate	Text area containing the outbound Sync BOD template for entities with CRM configured as the system of record.		03	
BODMAPPING	AcknowledgeTemplate	Text area containing the outbound Ack BOD template for entities with CRM configured as the system of record.		03	
BODMAPPING	PreNounHandler	Reference to a customized inbound BOD handler used by some vertical applications.		03	
BODMAPPING	OutboundHandler	Reference to a customized outbound BOD handler used by some vertical applications.		03	
BODMAPPING	IsExtension	A True/False value that indicates that the entity is an extension of another bodfieldmapping entity		08	
BODMAPPING	IsMasterData			08	
BOEPAMAPPING	BackOfficeID	Foreign key reference to BackOffice		08	
BOEPAMAPPING	IsExtension	A True/False value that indicates that the entity is an extension of another bodfieldmapping entity		08	
BOEPASERVICE	STDBOEPAServiceID	Standard pricing service back office ID. Reference ID for customized price service records providing the back link to the original price service record		02	
BOEPASERVICE	EndPoint	The URL for the back office integrated application web service.		02	
BOEPASERVICE	Username	Name of the user under whose name the back office integrated service is running.		02	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
BOEPASERVICE	Password	Password for the user under whose name the back office integrated service is running.		02	
BOEPASERVICE	ServiceType	The picklist based list of supported price and availability web service protocols based on the host system guide instructions.		02	
BOEPASERVICE	Method	Indicates the method of the pricing request. The type of Web service protocol used by the price service.		02	
BOEPASERVICE	Action	The web service functionality being used by the price service.		02	
BOEPASERVICE	AuthType	The type of authentication being used for the price service.		02	
BOEPASERVICE	IsExtension	A True/False value that indicates that the entity is an extension of another bodfieldmapping entity		08	
OFFICEPROFILE (BRANCHOPTIONS)	MaximumFavoriteGroups	Allows the administrator to set a limit for the number of groups a user can designate as favorites.		06	
OFFICEPROFILE (BRANCHOPTIONS)	UseEmailLink	Enables or disables the Error Notifications Admin Email Link feature.		08	
OFFICEPROFILE (BRANCHOPTIONS)	EmailAddress	Specifies the email address to populate the email message To: field when the Error Notifications Admin Email Link feature is enabled.		08	
CARRIER	ErpUniqueld	Internal multi-segment Unique Id consisting of: ErpAccountingEntityId, ErpLocationId and ErpExtId		03	
CONTACT	AlternateKeyPrefix	The first part of the pretty key for the Contact.		03	
CONTACT	AlternateKeySuffix	The last part of the pretty key for the Contact. Based on the Contact ID.		03	
CONTACT	ErpNotes	Notes synced from the integrated Back Office.		06	
COUNTRYCODEMAPPING	AddressFormat	This field stores the encoded address format for a given country.			8.4
DISCOUNTCHARGEITEM	LineNumber	Represents the Line Number in the invoice.		02	
DISCOUNTCHARGEITEM	DistributedTaxSOID	Relationship for tax detail references to SalesOrder		02	
DISCOUNTCHARGEITEM	DistributedTaxSOItemID	Relationship for tax detail references to SalesOrderItem.		02	
DISCOUNTCHARGEITEM	CalculationMethodCode	Method by which the discounts are calculated.		02	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
DISCOUNTCHARGEITEM	UnitAdjustmentAmount	Supports the System of Record feature		08	
DISCOUNTCHARGEITEM	DocUnitAdjustmentAmount	Supports the System of Record feature		02	
ERPBILLTO	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPBILLTOACCOUNTINGENTITY	PaymentTermId	Accounting Entity specific payment terms for a bill to.			
ERPINVOICE	Type	The type of document that caused this invoice to exist.		06	
ERPINVOICE	DueDate	The date by which the sales order must be delivered.		06	
ERPINVOICE	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPINVOICE	IsNormalized	Supports the Normalized Base Currency feature. InforCRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
ERPINVOICEITEM	LineNumber	Infor CRM based invoice line number index.		06	
ERPINVOICEITEM	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPINVOICEITEM	ExtendedBasePrice	Price times quantity		06	
ERPPAYFROM	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPPAYFROMACCOUNTINGENTITY	TaxCode	Tax Code. ERP system based Tax exempt code.			8.4
ERPRECEIVABLE	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPRECEIVABLE	IsNormalized	Infor CRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
ERPRECEIVABLEITEM	LineNumber	Line number for the item in an invoice		06	
ERPRECEIVABLEITEM	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPRETURNPRODUCT	RestockAmount	Quantity at which the order to restock an item is generated.		06	
ERPRETURNPRODUCT	ErpNotes	Notes synced from the integrated Back Office.		06	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
ERPSHIPMENT	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPSHIPMENT	IsNormalized	Supports the Normalized Base Currency feature. Infor CRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
ERPSHIPMENTITEM	LineNumber	Line number for the item in an invoice		06	
ERPSHIPMENTITEM	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPSHIPTO	ErpNotes	Notes synced from the integrated Back Office.		06	
ERPSHIPTOACCOUNTINGENTITY	TaxCode	Tax Code. ERP system based Tax exempt code.			8.4
EXCHANGERATE	ExchangeRateID	Unique identifier for the exchange rate.			
EXCHANGERATE	PeriodID	Supports the dated exchange rate feature.			8.4
EXCHANGERATE	CurrencyActive	Denotes if the currency code is active for the business.			8.4
EXCHANGERATE	ProviderName	Name of the provider (source) from where the exchange rates were downloaded. For manually updated rates, provider will be the CRM user name.			8.4
EXCHANGERATE	AutomaticDownload	Denotes if exchange rates for this record should be automatically downloaded through the provider mentioned in Exchange Rate Services integration.			8.4
EXCHANGERATE	DownloadComplete	Denotes if exchange rate for the given currency has been downloaded from external provider mentioned in Exchange Rate Services integration.			8.4
HISTORY	IONWorkflowDefinitionId			08	
HISTORY	IONWorkflowDefinitionName			08	
IMPORTHISTORY	PrimaryEntityGroup	Indicates the Entity being imported.		08	
IMPORTHISTORY	StatusCode	Indicates the success of the Action, in this case, the import.		08	
INTEGRATION	Version	The version of the module being integrated		06	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
INTEGRATION	AdminEmailAddress	The impersonation users email address; used for sync for exchange		06	
INTEGRATION	AdminEmailPassword	The impersonation users email password; used for sync for exchange		06	
INTEGRATION	AdminUserName	The administrator user name.		08	
INTEGRATION	Domain	Windows domain for the AdminUserName.		08	
OPPORTUNITY	AlternateKeyPrefix	The first part of the pretty key for the Opportunity.		02	
OPPORTUNITY	AlternateKeySuffix	The last part of the pretty key for the Opportunity.		02	
OPPORTUNITY	ErpExtId	Supports the System of Record feature. The unique ID as defined by the ERP system.		02	
OPPORTUNITY	ErpVariationId	Supports the System of Record feature: BOD sequence number published by the ERP system to ensure outdated BOD content never overwrites updated content in the subscriber application		02	
OPPORTUNITY	SyncStatus	Indicates status of synchronization for this record.		02	
OPPORTUNITY	ErpLocation			02	
OPPORTUNITY	DocActualAmount			02	
OPPORTUNITY	DocSalesPotential			02	
OPPORTUNITY	ERPUniqueID	System of Record: Internal multi-segment Unique Id consisting of: ErpAccountingEntityId, ErpLocationId and ErpExtId		02	
OPPORTUNITY	IsNormalized	Supports the Normalized Base Currency feature. InforCRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
OPPORTUNITY	MarketoSyncMessage	Supports Marketo: provides a message indicating that a record has been successfully synced to Marketo provides date time of sync		08	8.4
OPPORTUNITY	MarketoToGUID	Supports Marketo: provides a GUID when the opportunity has been successfully linked to Marketo			8.4
OPPORTUNITY	MarketoStatus	Supports Marketo: provides an update regarding if the record has been successfully linked to Marketo.			8.4

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
OPPORTUNITY	MarketonOperation	Supports Marketo: provides the last sync action for instance insert or update to Marketo			8.4
OPPORTUNITY	MarketoLastAction	Supports Marketo: provides the last sync action for instance insert or update to Marketo.			84
OPPORTUNITY_PRODUC T	UnitOfMeasureId	The unit-of-measure (UOM) code associated with the quantity.		02	
OPPORTUNITY_PRODUC T	ATPDate	Date upon which items identified as Available to Promise can be delivered.		02	
OPPORTUNITY_PRODUC T	AvailableQuantity	The quantity of an item on hand.		02	
OPPORTUNITY_PRODUC T	DocCalculatedPrice	Document Calculated Price. Discounted unit price, in local currency, of the item for the number of items in the unitCode specified in the PerQuantity elements.		02	
OPPORTUNITY_PRODUC T	DocExtendedPrice	Document Extended Price. Quote line amount not including taxes or charges in local currency. In the case of orders, this is typically the Unit Price times the Order Quantity.		02	
OPPORTUNITY_PRODUC T	ConfigurationId			06	
OPPORTUNITY_PRODUC T	ConfigurationDetailId			06	
PACKAGEKITCHILDVIEW (no table)	Product.ErpStatus	Supports the System of Record feature		02	
PICKLIST	DefaultCode	The default item presented in a pick list.		08	
PRODUCT	IntegrationConfigGroupI d			03	
PRODUCT	ApplicationId			08	
PRODUCT	NameSpace	The namespace of the product configurator model as defined in PCM Design Studio.		08	
PRODUCT	DerivedFromItem	Where a modification has been made to an existing item, this property indicates the original item.		08	
PRODUCT	Customized			08	
PRODUCT	Ruleset	This is the name of the Product Configuration Model as defined in PCM Design Studio. For example, if the product being designed is a bicycle, the Ruleset name assigned might be "Bike".		08	
PRODUCT	ApplicationName			08	
PRODUCT	ProductVariant			08	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
QUOTE	ERPNotes	Notes synced from the integrated Back Office.		06	
QUOTE	IsNormalized	Supports the Normalized Base Currency feature. InforCRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
QUOTE	DescriptionType				8.4
QUOTE	AlternateDocumentId				8.4
QUOTEITEM	ErpNotes	Notes synced from the integrated Back Office.		06	
RETURN(RMA)	ErpNotes	Notes synced from the integrated Back Office.		06	
RETURN(RMA)	IsNormalized	Supports the Normalized Base Currency feature. InforCRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
RETURNADDRESS (RMADDRESS)	CountryCode	Code used to represent a country in an Address.		04	
RETURNADDRESS (RMADDRESS)	Address5	Return address line item 5		04	
RETURNADDRESS (RMADDRESS)	Address6	Return address line item 6		04	
ROLE	ErpExtId	The unique ID as defined by the ERP system.		02	
ROLE	AlternateKeyPrefix	The first part of the pretty key for the Role.		02	
ROLE	AlternateKeySuffix	The last part of the pretty key for the Role.		02	
ROLE	ErpAccountingEntityId	Accounting Entity ID. The ERP system based company or accounting entity.			
ROLE	ErpUniqueId	Internal multi-segment Unique Id consisting of: ErpAccountingEntityId, ErpLocationId and ErpExtId			

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
ROLE	ErpVariationId	BOD sequence number published by the ERP system to ensure outdated BOD content never overwrites updated content in the subscriber application.			
ROLE	SyncStatus	Indicates status of synchronization for this record.			
ROLE	ErpStatus	The ERP system defined Role status.			
ROLE	ErpRoleName	The ERP system defined Role name.			
ROLE	ErpLogicalId	The Back Office logical Id for the ERP system..			
SALESORDER	LocationId	Generated by the ERP system.		03	
SALESORDER	SyncStatus	Indicates status of synchronization for this record.		03	
SALESORDER	ErpNotes	Notes synced from the integrated Back Office.		06	
SALESORDER	IsNormalized	Supports the Normalized Base Currency feature. Infor CRM can have existing records that do not have the same base currency code and transaction currency code as the Infor CRM system currency code. This flag indicates whether such records have been 'Normalized' so that the base currency value is equivalent of the Infor CRM system currency code using exchange rates stored in Infor CRM.		08	
SALESORDERITEMS	TotalAmount			03	
SALESORDERITEMS	DocCalculatedPrice	Document Calculated Price. Discounted unit price, in local currency, of the item for the number of items in the unitCode specified in the PerQuantity elements.		03	
SALESORDERITEMS	DocExtendedPrice	Document Extended Price. Quote line amount not including taxes or charges in local currency. In the case of orders, this is typically the Unit Price times the Order Quantity.		03	
SALESORDERITEMS	AvailableQuantity	The quantity of an item on hand.		03	
SALESORDERITEMS	ATPDate	Date upon which items identified as Available to Promise can be delivered		03	
SALESORDERITEMS	ErpNotes	Notes synced from the integrated Back Office.		06	
SYSBODOUTOFORDER	PropertyValue	The pending value for junction table properties.			8.4
SYSBOEOUTBOUNDTXN	RelatedEntityName			03	
SYSBOEOUTBOUNDTXN	RelatedEntityId			03	

## Plugin changes in this release

Entity	Property	Description	Read Only	8.3 .x	8.4
SYSBOEOUTBOUNDTXN	BODId			03	
SYNCRESULT	Action			08	
USER (USERSECURITY table)	ERPEXTID	The unique ID as defined by the ERP system.	x	09	
USER	ERPVARIATIONID	BOD sequence number published by the ERP system to ensure outdated BOD content never overwrites updated content in the subscriber application	x	09	
USER	ERPLOGICALID	The Back Office logical Id for the ERP system.	x	09	
USER	ERPUNIQUEID	Internal multi-segment Unique Id consisting of: ErpAccountingEntityId, ErpLocationId and ErpExtId	x	09	
USER	SYNCSTATUS	Indicates status of synchronization for this record.		09	
USER	ERPSTATUS	The ERP system define Account status.	x	09	
USER	ERPDISTINGUISHEDID		x	09	

### Tables with no Corresponding Entity in the Entity Model

Table	Property Name	Read only	8.3.x	8.4
PLUGIN table (not entity)	CustomFlag		06	

### New or Updated Forms

Form Name		8.3.x	8.4
ACCOUNT	AccountAccountingEntities		8.4
ACCOUNT	Attachments	04	
ACCOUNT	ErpAccountInvoices		8.4
ACCOUNT	ErpAccountInvoicesAging		8.4
ACCOUNT	ErpAccountReceivables		8.4
ACCOUNT	ErpAccountShipments		8.4
ACCOUNT	Notes-History	02	
ACCOUNT	Quotes		8.4
ACCOUNT	Returns		8.4
ACCOUNT	SalesOrders		8.4
CONTACT	Attachments	04	
CONTACT	Notes-History	02	
CONTRACT	Attachments	04	
CONTRACT	Notes-History	04	
DEFECT	Attachments	04	
ERPBILLTO	ErpBillToAccountingEntities		8.4
ERPBILLTO	ErpBillToInvoices		8.4
ERPBILLTO	ErpBillToInvoiceAging		8.4
ERPBILLTO	ErpBillToReceivables		8.4

## Plugin changes in this release

Form Name		8.3.x	8.4
ERPBILLTO	ErpBillToReturns		8.4
ERPBILLTO	ErpBillToSalesOrders		8.4
ERPPAYFROM	ErpPayFromAccountingEntities		8.4
ERPPAYFROM	ErpPayFromReceivables		8.4
ERPPAYFROM	ErpPayFromSalesOrders		8.4
ERPPERSON	ErpPersonAccountingEntities		8.4
ERPSHIPTO	ErpShipToAccountingEntities		8.4
ERPSHIPTO	ErpShipToInvoices		8.4
ERPSHIPTO	ErpShipToInvoiceAging		8.4
ERPSHIPTO	ErpShipToReceivables		8.4
ERPSHIPTO	ErpBillToReturns		8.4
ERPSHIPTO	ErpBillToSalesOrders		8.4
ERPSHIPTO	ErpShipToShipments		8.4
LEAD	Attachments	04	
LEAD	Notes-History	04	
OPPORTUNITY	Attachments	04	
OPPORTUNITY	Notes-History	04	
RMA	Attachments	04	
SYSTEM	Account Detail	04	
SYSTEM	Add Edit Address	08	
SYSTEM	Add Edit Campaign Stage	03	
SYSTEM	Add Edit Sales Order	03	
SYSTEM	Add Edit Stage Task	03	
SYSTEM	Add New Contact Account	08	
SYSTEM	Add Opportunity Product	02	
SYSTEM	Contact Detail	04	
SYSTEM	Contract Detail	04	
SYSTEM	Defect Detail	03	
SYSTEM	Edit Opportunity Contact	04	
SYSTEM	History Details View	04	
SYSTEM	Import Leads	02	
SYSTEM	Import Leads Options	02	
SYSTEM	Insert Campaign	03	
SYSTEM	Insert New Lead	03	
SYSTEM	Insert New Ticket	03	
SYSTEM	Insert Opportunity	02	
SYSTEM	Lead Detail	04	
SYSTEM	Manage Product	04	
SYSTEM	Manage Targets	03	
SYSTEM	Matching Leads	04	
SYSTEM	MoveContact	04	
SYSTEM	Opportunity Detail	04	
SYSTEM	Potential Matches	02	
SYSTEM	SLX Report Manager View	04	
SYSTEM	UpdateQuota	04	
TICKET	Attachments	04	

## New or Updated Reports

Report Name	8.3.x	8.4
Labels: A4 Avery L7162 - Address	01	
Labels: A4 Avery L7159 - Address	08	

## New or Updated Plugins

Plugin Name	Purpose	8.3.x	8.4
[ACOGroup]:ACCOUNT: Sales Intelligence	Supports Sales Intelligence and provides recommendations and Rationals on the detail page for the account.	06	
[ACOGroup]:Contact: Sales Intelligence	Supports Sales Intelligence and provides recommendations and Rationals on the detail page for the account.	06	
[ACOGroup]:Contact: Duplicate Emails	Supports displaying duplicate emails.		
CrystalReport: Opportunity: Opportunity Detail			
DashboardWidget : System: Column Chart	Supports Ming.le dashboard widgets and allows the user to select all Infor CRM entities and create a column chart	08	
DashboardWidget: System: Funnel Chart	Supports Ming.le dashboard widgets and allows the user to select all Infor CRM entities and funnel a column chart	08	
DashboardWidget System: Group List	Supports Ming.le dashboard widgets and allows the user to select all Infor CRM entities and create a group list chart	07	
DashboardWidget: System: LineChart	Supports Ming.le dashboard widgets and allows the user to select all Infor CRM entities and create a line chart	08	
DashboardWidget System: Links	Supports all Ming.le dashboards charts	08	
DashboardWidget System: SData Feed	Supports all Ming.le dashboards charts	08	
DashboardWidget: System: Todays Activities	Supports Ming.le dashboard widgets and allows the user to create a chart based on their daily activities.	08	
Group AREACATEGORYISSUE:All	Update to existing Group.		
Group BODMAPPING:CustomBODMappings	Displays custom BOD mappings.		
Group BODMAPPING:StandardBODMappings	Displays standard BOD mappings.		
Group BODMAPPING:InactiveBODMappings	Displays inactive BOD mappings.		
Group BODMAPPING:AllBODMapping	Displays all BOD mappings.		
Group BODMAPPING:Active BOD Mappings	Displays Active BOD mappings.		
Group CUSTOMSETTINGS:All Custom Settings	Displays custom settings.		
Group DEFECTACTIVITYRATE:AllRates	Display all defect activity rates.		
Group ERPINVOICE:All Invoice	Displays all invoices.		
Group ERPRECEIVABLE:ActiveReceivables	Displays active receivables.		
Group EXCHANGERATE:All Exchange Rates	Displays all exchange rates		
Group EXCHANGERATE		08	
Group LITERATURE:All Literature Items	Displays all literature items	09	
Group PLACE:AllPlaces	Supports the Contour feature	04	
Group PLACE:MyPlaces	Supports the Contour feature	04	
Group PLACE:SharedPlaces	Supports the Contour feature	04	
Group PRODUCT:Available Products	Displays available products.	09	
Group SALESORDER:All Sales Orders	Displays all sales orders.	09	
Group SALESORDER:My Sales Orders	Displays sales orders owned by the logged in user.	09	

## Plugin changes in this release

Plugin Name	Purpose	8.3.x	8.4
Group SYNCRESULT:AllSyncResults		08	
Group SYSBOEOUTBOUNDTXN:AllTransactions		09	
Group TICKETACTIVITYRATE:AllTicketActivityRates	Displays all available Ticket Activity Rates.	09	

## New or Updated Scripts

Script Name	Purpose	8.3.x	8.4
VBScript Opportunity: SLX OnOpen Opportunity Statistics Report		09	
VBScript System: Attachment Support		06	
BScript System: SLX_Common		04	
VBScript System: SLX_Export_Group_To_Excel	Used to export a selected group to Microsoft Excel.	06	
VBScript System: SLX Crystal Report		09	

## New or Updated Database Objects – VFS Actions bundle

Creates the following database objects	8.3.x	8.4
ADDRESS_INTEGRATION_INSERT_A(MSSQL)	08	
ADDRESS_INTEGRATION_INSERT(MSSQL)	08	
ADDRESS_INTEGRATION_DELETE_A(MSSQL)	08	
ADDRESS_INTEGRATION_DELETE(MSSQL)	08	
ADDRESS_INTEGRATION_CHANGE_A(MSSQL)	08	
ADDRESS_INTEGRATION_CHANGE(MSSQL)	08	
Alter Sync Result Column (Oracle)	09	
AttendeeRemoteSync(All)	02	
CONTACT_INTEGRATION_CHANGE(MSSQL)	07	
CONTACT_INTEGRATION_CHANGE_A(MSSQL)	07	
CreateBackOfficeMappingViews(MSSQL)	07	
CreateBackOfficeMappingViews(Oracle)	07	
CreateBackOfficePriceServiceViews(MSSQL)	07	
CreateBackOfficePriceServiceViews(Oracle)	07	
CreateBODMapFieldMapViews(MSSQL)	07	
CreateBODMapFieldMapViews(Oracle)	07	
CreatePriceServiceMappingViews(MSSQL)	07	
CreatePriceServiceMappingViews(Oracle)	07	
CRMPREFIXFORROLES	05	
DeleteObsoleteSmartParts	02	
DeletePickListItem	08	
DependencyLookupControl(All)	05	
FixAttendeeRolePicklist (Oracle)	03	
FixOpportunityDateOpenedType(All)	05	
Foreign Key for SIRecommendation - SIRationale (MSSQL)	06	
PackageKitChildView - Add ErpStatus Column (MSSQL)	02	

## Plugin changes in this release

Creates the following database objects	8.3.x	8.4
PackageKitChildView - Add ErpStatus Column (Oracle)	02	
PickList_FlatView(MSSQL)	08	
PickListItemView(MSSQL)	03	
PickListView(MSSQL)	08	
PickList_ActiveLanguageView(MSSQL)	08	
PickList_BaseLanguageView(MSSQL)	08	
PickList_LanguageMapView(MSSQL)	08	
PickListItem_LanguageView(MSSQL)	08	
PickList_FlatView(Oracle)	08	
PickListItemView(Oracle)	08	
PickListView(Oracle)	08	
PickList_ActiveLanguageView(Oracle)	08	
PickList_BaseLanguageView(Oracle)	08	
PickList_LanguageMapView(Oracle)	08	
PickListItem_LanguageView(Oracle)	08	
PlaceRemoteSync	04	
ProdPackageKitView - Add ErpStatus Column (MSSQL)	02	
ProdPackageKitView - Add ErpStatus Column (Oracle)	02	
Remove duplicate CustomSetting records	02	
Remove Invalid ObjectNames (MSSQL)	02	
SetMaxFavoriteGroups	06	
UpdateMSSQLConfigurationID	06	
UpdateOracleConfigurationID	06	
USERSECURITY_FEDERATEDIDENTITY_LENGTH_A(MSSQL)	03	
USERSECURITY_FEDERATEDIDENTITY_LENGTH_U(MSSQL)	03	
USERSECURITY_FEDERATEDIDENTITY_LENGTH_A(Oracle)	03	
USERSECURITY_FEDERATEDIDENTITY_LENGTH_U(Oracle Unicode)	03	
USERSECURITY_USERNAME_LENGTH_U(MSSQL)	03	
USERSECURITY_USERNAME_LENGTH_A(MSSQL)	03	

## New or Updated Database Objects - .sxb bundle

Creates the following database objects	8.3.x	8.4
Trigger : MSSQL : CONTACT_INTEGRATION_INSERT	08	
Trigger : MSSQL : USERACTIVITY_INT_INSTEAD_INS	01	
Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGE	08	
Trigger : MSSQL : USERACTIVITY_INTEGRATION_CHANGE_A	08	
Trigger : Oracle : CONTACT_AFTER_CHANGES	08	
View : MSSQL : PickListView	08	
View :MSSQL :PickList_FlatView	08	
View :MSSQL :PickListItemView	08	
View :MSSQL :PickListItem_ActiveLanguageView	08	
View :MSSQL :PickListItem_BaseLanguageView	08	
View :MSSQL :PickListItem_LanguageMapView	08	
View :MSSQL :PickListItem_LanguageView	08	
View :Oracle : PickList_FlatView	08	
View : Oracle : PickListView	08	
View :Oracle :PickListItemView	08	

## Plugin changes in this release

Creates the following database objects	8.3.x	8.4
View :Oracle :PickListItem_ActiveLanguageView	08	
View :Oracle :PickListItem_BaseLanguageView	08	
View :Oracle :PickListItem_LanguageMapView	08	
View : Oracle: PickListItem_LanguageView	08	

## Create indexes

Creates the following indexes	8.3.x	8.4
BACKOFFICE.LOGICALID_IDX	06	
CARRIER.CARRIER_ErpUniqueld	07	
CONTACT.CONTACT_LFNAMECID	07	
CONTACT.CONTACT_APPIDTICK	07	
DISCOUNTCHARGEITEM.DISTRIBUTEDTAXSOID_IDX	06	
DISCOUNTCHARGEITEM.DISTRIBUTEDTAXSOITEMID_IDX	06	
DISCOUNTCHARGEITEM.INVOICEID_IDX	06	
DISCOUNTCHARGEITEM.INVOICEITEMID_IDX	06	
DISCOUNTCHARGEITEM.QuotelId_IDX	06	
DISCOUNTCHARGEITEM.QuoteltemId_IDX	06	
DISCOUNTCHARGEITEM.ReceivableId_IDX	06	
DISCOUNTCHARGEITEM.SALESORDERID_IDX	06	
DISCOUNTCHARGEITEM.SALESORDERITEMSID_IDX	06	
DISCOUNTCHARGEITEM.ShipmentId_IDX	06	
ERPINVOICE.ERPINVOICE_GRANDTOT	07	
ERPINVOICE.ERPINVOICE_ERPINVOICEID	07	
ERPINVOICE.ERPINVOICE_EXTID_ERPINVOICE	07	
ERPINVOICE.ERPINVOICE_SECCODEACCT	07	
ERPINVOICEITEM_ERPINVOICEITEM_ERPINVOICEITEMID	07	
ERPSHIPMENT.ERPSHIPMENT_SHIPDOCREF	07	
PICKLIST.PICKLIST_SHORT	07	
PRODUCT.PRODUCT_PRODIDMODUSER	07	
PRODUCT.PRODUCT_PRODNAMEPRODID	07	
SALESORDER.SALEORDER_GRANDTOT	07	
SALESORDER.SALESORDER_SUFXPREFIX	07	
SICUSTOMER.SICUSTOMER_CUSTOMERID	06	
SIRECOMMENDATION.SIRECORMMENDATION_CUSTOMERID	06	
SYNCRESULT.SYNCRESULT_APPCODE	07	
UNITOFMEASURE.UNITOFMEASURE_PRODID_NAME	07	

## New or updated views

Creates the following views	8.3.x	8.4
ERPBillToInvoiceAgingView		8.4
ERPInvoiceView		8.4

## Insert Records

Inserts records into the following entities	8.3.x	8.4
APPIDMAPPING	03	
BACKOFFICE	02	
BACKOFFICEACCTENTITY	02	
BODFIELDMAPPING	02	
BODMAPPING	02	
COUNTRYCODEMAPPING	09	
COUNTRYALIAS	09	
CUSTOMSETTING	01	
EXCHANGERATE	08	
INDEXDEFINITION	04	
INTEGRATION	04	
IONWORKFLOWDEFINITION	08	
IONWORKFLOWMAPPING	08	
JOINDATA	04	
SECPROFILE	09	
USEROPTIONDEF	04	
VIRTUALFILESYSTEM	08	

## Insert Picklist

Inserts the following picklists	8.3.x	8.4
Calculation Methods	01	
City	08	
CurrencyCodes	08	
ErpAccountStatus	03	
ErpQuoteStatus	02	
QuoteStatus	02	
SearchClause	03	
SyncStatus	03	
SystemOfRecord	02	
Workflow Status	08	

## New or Update Custom Setting

Creates the following custom settings	Purpose	8.3.x	8.4
[Groups] CreatePivot = True	True/False setting that defines if pivot tables are created for excel exports.	06	
[Groups] MaxExportRecordCount = 65000	Sets the maximum count of records that can be exported at one time.	06	

## New or Updated Roles

Creates or updates the following roles	Purpose	8.3.x	8.4
Administrator		06	
Standard User		01	
Contour	Provides the user with the ability to Map user addresses.	04	

## New or Updated Secured Actions

Creates or updates the following secured actions	Purpose	8.3.x	8.4
Administration/CustomSetting/Add		06	
Administration/CustomSetting/Delete		06	
Administration/CustomSetting/Edit		06	
Administration/CustomSetting/View		06	
Administration/GroupManager/Groups/ToggleUserDefault		06	
Contour/Map/Account	Supports the Contour feature: provides the ability to map a account.	04	
Contour/Map/Contact	Supports the Contour feature: provides the ability to map a Contact..	04	
Contour/Map/Group	Supports the Contour feature: provides the ability to map a Group.	04	
Contour/Map/Menu	Supports the Contour feature: allows for searching and viewing groups on a map.	04	
Entities/Account/Hierarchy	Supports the Account Hierarchy feature: provides the ability to access account hierarchy (essentially turns feature on).	08	
Entities/IONWorkflowDefinition/Add	Supports the ION Workflow feature: allows user to add a workflow definition.	08	
Entities/IONWorkflowDefinition/Edit	Supports the ION Workflow feature: allows user to edit a workflow definition.	08	
Entities/IONWorkflowDefinition/Delete	Supports the ION Workflow feature: allows user to delete a workflow definition.	08	
Entities/IONWorkflowDefinition/View	Supports the ION Workflow feature: allows user to view a workflow definition.	08	
Entities/JobManager/ViewAllExecutions		07	
Entities/JobManager/ViewAllTriggers		07	
Entities/Lead/CancelIONWorkflow	Supports the ION Workflow feature: allows user to cancel an inflight workflow	08	
Entities/Lead/InitiateWorkflow	Supports the ION Workflow feature: allows user to initiate a workflow	08	
Entities/Opportunity/CancelIONWorkflow	Supports the ION Workflow feature: allows user to cancel an inflight workflow	08	
Entities/Opportunity/InitiateWorkflow	Supports the ION Workflow feature: allows user to initiate a workflow	08	
Entities/Opportunity/Promote		02	
Entities/Place/Add	Supports the Contour feature: allows the user to add a place.	04	
Entities/Place/Delete	Supports the Contour feature: allows the user to delete a place.	04	
Entities/Place/Edit	Supports the Contour feature: allows the user to edit a place.	04	
Entities/Place/Share	Supports the Contour feature: allows the user to share a place.	04	
Entities/Place/ShareDelete	Supports the Contour feature: allows the user to Share/Delete a place.	04	
Entities/Place/ShareEdit	Supports the Contour feature: allows the user to Share/Edit a place.	04	
Entities/Place/View	Supports the Contour feature: allows the user to view a place.	04	

## Plugin changes in this release

Creates or updates the following secured actions	Purpose	8.3.x	8.4
Entities/Quote/GetOrderTotal		01	
Entities/Quote/RePriceQuote		02	
Entities/Quote/InitiateWorkflow	Supports ION Workflow feature: allows the user to initiate a workflow	08	
Entities/Quote/CancelIONWorkflow	Supports ION Workflow feature: allows the user to cancel an inflight workflow	08	
Entities/SalesOrder/GetOrderTotal		01	
Entities/SalesOrder/CancelIONWorkflow	Supports the ION Workflow feature: allows the user to cancel an inflight workflow	08	
Entities/SalesOrder/InitiateWorkflow	Supports the ION Workflow feature: allows the user to initiate a workflow	08	
Entities/SalesOrder/RePriceOrder		02	
Entities/Role/Promote	Supports Ming.le to promote roles from Infor CRM to Ming.le (2 way sync).	05	
Entities/User/Promote	Supports Ming.le to promote users from Infor CRM to Ming.le (2 way sync).	05	
ErrorLookupService/View		08	
Navigation/Administration/View		06	
Navigation/Sales/View		06	
Navigation/Marketing/View		06	
Navigation/Service/View		06	
Navigation/Support/View		06	
Navigation/Integration/View		06	
Toolbar/New/View		06	
Toolbar/Schedule/View		06	
Toolbar/Tools/View		06	
Toolbar/Administration/View		06	
Toolbar/Tools/LiteratureRequestManagement/View		06	
Toolbar/Tools/ImportHistory/View		06	
Toolbar/Tools/Options/View		06	
Toolbar/Tools/AdvancedSpeedsearch/View		06	

## New or updated Custom Settings

Creates the following custom settings	Purpose	8.3.	8.4
Administration/CustomSetting/Add		06	
Administration/CustomSetting/Delete		06	
Administration/CustomSetting/Edit		06	
Administration/CustomSetting/View		06	
Administration/CustomSetting/View		06	
Administration/GroupManager/Groups/ToggleUserDefault		06	

## Plugin changes in this release

Creates the following custom settings	Purpose	8.3.	8.4
Contour/Map/Account	Supports the Contour feature: provides the ability to map an account.	04	
Contour/Map/Contact	Supports the Contour feature: provides the ability to map a Contact.	04	
Contour/Map/Group	Supports the Contour feature: provides the ability to map a Group.	04	
Contour/Map/Menu	Supports the Contour feature: allows for searching and viewing groups on a map.	04	
Entities/Account/Hierarchy	Supports the Account Hierarchy feature: provides the ability to access account hierarchy (essentially turns feature on).	08	
Entities/IONWorkflowDefinition/Add		08	
Entities/IONWorkflowDefinition/Edit		08	
Entities/IONWorkflowDefinition/Delete		08	
Entities/IONWorkflowDefinition/View		08	
Entities/JobManager/ViewAllExecutions		07	
Entities/JobManager/ViewAllTriggers		07	
Entities/Lead/CancellIONWorkflow		08	
Entities/Lead/InitiateWorkflow		08	
Entities/Opportunity/CancellIONWorkflow		08	
Entities/Opportunity/InitiateWorkflow		08	
Entities/Opportunity/Promote		02	
Entities/Place/Add	Supports the Contour feature: allows the user to add a place.	04	
Entities/Place/Delete	Supports the Contour feature: allows the user to delete a place.	04	
Entities/Place/Edit	Supports the Contour feature: allows the user to edit a place.	04	
Entities/Place/Share	Supports the Contour feature: allows the user to share a place.	04	
Entities/Place/ShareDelete	Supports the Contour feature: allows the user to Share/Delete a place.	04	
Entities/Place/ShareEdit	Supports the Contour feature: allows the user to Share/Edit a place.	04	
Entities/Place/View	Supports the Contour feature: allows the user to view a place.	04	
Entities/Quote/GetOrderTotal		01	
Entities/Quote/RePriceQuote		02	
Entities/Quote/InitiateWorkflow		08	
Entities/Quote/CancellIONWorkflow		08	
Entities/SalesOrder/GetOrderTotal		01	
Entities/SalesOrder/CancellIONWorkflow		08	
Entities/SalesOrder/InitiateWorkflow		08	
Entities/SalesOrder/RePriceOrder		02	
Entities/Role/Promote	Supports Ming.le to promote roles from Infor CRM to Ming.le (2 way sync).	05	

## Plugin changes in this release

Creates the following custom settings	Purpose	8.3.	8.4
Entities/User/Promote	Supports Ming.le to promote users from Infor CRM to Ming.le (2 way sync).	05	
ErrorLookupService/View		08	
Navigation/Administration/View		06	
Navigation/Sales/View		06	
Navigation/Marketing/View		06	
Navigation/Service/View		06	
Navigation/Support/View		06	
Navigation/Integration/View		06	
Toolbar/New/View		06	
Toolbar/Schedule/View		06	
Toolbar/Tools/View		06	
Toolbar/Administration/View		06	
Toolbar/Tools/LiteratureRequestManagement/View		06	
Toolbar/Tools/ImportHistory/View		06	
Toolbar/Tools/Options/View		06	
Toolbar/Tools/AdvancedSpeed search/View		06	

## Deprecated Items

Item	Property Name	Purpose	Read only	8.3.x	8.4
SchedulerTrigger	Geocode Every Fifteen Minutes Indefinitely	Supports Contour by refreshing the Geocode.		09	