Infor CRM Implementation Guide

Copyright © 2016 Infor

Publication Information

Release: v8.3

Publication date: March 18, 2016

Contents

Introduction

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

About This Guide

This is the *Infor CRM Implementation Guide.* It provides step-by-step instructions for installing a full version of Infor CRM in your organization's environment.

- If a version of Infor CRM (Saleslogix) is not already installed in your environment, follow the steps in this guide.
- If you are upgrading from Infor CRM version 8.2 or later, refer to the guide called *Upgrading to Infor CRM v8.3.PDF*.
- If you are upgrading from version 7.5.4 or earlier, use the appropriate upgrade documents to first upgrade to version 8.2 or later before upgrading to version 8.3 These documents are available from the Infor Xtreme support portal at www.infor.com/Inforxtreme.

This guide is written for system administrators, Webmasters, and information system professionals.

Choosing Components for Your Implementation

Infor CRM is a feature-rich product with multiple possible installation scenarios. Choose your core installation option (Standard or Custom), and then install the Infor CRM Clients and peripherals based on the needs of your organization. The following table provides an overview. See the *Infor CRM Planning Guide* for more information about available Infor CRM Components.

Component	Available Options
Core components	
Choose one of two installation options.	• Standard • Custom
Clients	
You can install any combination of Infor CRM Clients.	• Web Client • Windows (LAN) Client • Mobile Client
Remotes	
Remotes are installations where users have a subset of the Infor CRM database located locally.	• Offline Web Client • Remote Office • Remote Users • Offline Web Client

Component	Available Options
Synchronization Synchronization enables exchange of data between databases. It is only required if your implementation includes Remotes.	
Optional components Optional components allow you to extend Infor CRM functionality.	• Infor CRM Xbar for Microsoft Office • Back Office Extension • CPQ • iFrame Integration

The Help symbol precedes online Help topic names, where you can find additional information about features or procedures not detailed in this guide.

What You Need to Know

The *Infor CRM Implementation Guide* assumes you have a working knowledge of Microsoft Windows operating systems, Microsoft Windows server technology and security, Microsoft Internet Information Services (IIS) Manager, and Web technology. You should also understand the client/server computing environment, especially networking strategies for network and remote users.

You should be familiar with your database platform and its operation and administration. Depending on the selected database platform, a Database Administrator (DBA) may be required for database tuning, maintenance, and customizations.

Planning Your Implementation

The most important element of a successful implementation is planning. The *Infor CRM Planning Guide* helps you plan your implementation process, from developing an implementation schedule to rolling out the system. The *Infor CRM Planning Guide* helps you:

- Determine who will perform the implementation and select your implementation team.
- Understand the product components and their purpose.
- Determine a method for synchronizing data between the main office and remotes (if applicable).
- You can obtain a copy of the *Infor CRM Planning Guide* from the InforXtreme Portal web site: www.infor.com/inforxtreme.

Related Documentation

In addition to the *Infor CRM Implementation Guide*, you may find the following documentation helpful.

- The *Infor CRM Planning Guide* provides installation and database recommendations, and guidelines to help you plan for a successful implementation. It is available on the inforXtreme Support Portal web site: www.infor.com/inforxtreme.
- The *Compatibility Guide* lists minimum and recommended hardware and the software qualified and supported for each version of Infor CRM. It is available from the InforXtreme Portal web site: www.infor.com/inforxtreme.
  New in v8.3: Compatibility information for Infor CRM v8.3 and later is available in the Infor Online Compatibility Matrix (OCM).
  1) Sign in to the InforXtreme Portal web site: www.infor.com/inforxtreme.
  2) Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
  Click Help for a video explaining the features of the OCM.

- The *LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize the Infor CRM Windows (LAN) Client to meet your specific needs. It is available from the InforXtreme Support Portal web site: www.infor.com/inforxtreme.
- The *Developer Tips* online Help contains information for developers, Webmasters, and IS professionals who are customizing the Infor CRM Web Client or creating custom Web applications. This help file contains conceptual overviews, customization scenarios, code samples, and references to help you develop your Web applications. The Developer Tips Help is available from the Application Architect.
- Online Help is available in each Infor CRM application.

Contacting Infor

If you have questions about Infor products, go to the InforXtreme Support Portal web site: www.infor.com/inforxtreme. If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Introduction

Chapter 1
Implementation Checklist

This chapter outlines the tasks you must complete to implement Infor CRM. These tasks are designed to help you organize and make decisions regarding your Infor CRM implementation. Any tasks that are recommended, but not required, are designated as 'optional'.

If you are implementing Infor CRM for the first time, read each chapter thoroughly to ensure you have correctly completed the necessary steps.

If you are upgrading from a previous version, do not use this document. Refer to the document called *Upgrading to Infor CRM* located in the Documentation folder.

Required Tasks

All implementations require the following tasks.

	Task	Page	Computer
	1. Read the *Infor CRM Planning Guide* and create an implementation plan.		
	2. Set permissions (security and access) for the WebDLL and SLXService users.	14	Administrative Workstation
	3. Install and configure your system prerequisites.	16	All computers and servers
	4. Create and share the logging folders.	22	Synchronization Server
	5. For Oracle installations, create your Infor CRM database. **Note** You must run the CreateOracleViews.sql script on your database before you can log into any Infor CRM products. For Microsoft SQL Server, the database is created during the installation.	117	Database Server
	6. Install the Saleslogix Server components.	28	All computers and servers
	7. Create Server database connections (if necessary).	30	Saleslogix Server
	8. For Oracle installations, create the Net Service Name and Client database connection.	32	Administrative Workstation
	9. For 64-bit systems, create a 32-bit OLE DB UDL.	32	Administrative Workstation
	10. Add the appropriate Infor CRM licenses.	33	Administrative Workstation
	11. Configure the Database to v8.3.	34	Administrative Workstation

	Task	Page	Computer
	12. Enter your main office information.	40	Administrative Workstation
	13. Configure options.	40	Administrative Workstation
	14. Understand e-mail integration options.	43	
	15. Add office information for customer service and support. This task applies if your installation uses customer service or support features.	44	Administrative Workstation
	16. Add new users and configure user profiles.	60	Administrative Workstation
	17. Set user access to Customer Service Management. This task applies if your installation uses customer service or support features.	62	Administrative Workstation
	18. (Optional) Create automated installations for the Network Client.	65	Administrative Workstation
	19. Install the Network Client on all Infor CRM user's computers.	65	Infor CRM Client computers
	20. For Oracle installations, create a Net Service Name and Client database connection.	117	Infor CRM Client computers
	21. Start the Network Client.	65	Infor CRM Client computers
	22. Create Area, Category, and Issue lists. This task applies if your installation uses customer service or support features.	66	Infor CRM Client computer
	23. Create the Contact Sync group. This task applies if your installation includes Outlook Integration.	67 and 75	Infor CRM Client and Web Client computers

Web Tasks

In addition to the "Required Tasks" on page 5, implementations that include Web components require the following tasks.

	Task	Page	Computer
	1. Install the Web Host.	47	Web Host server
	2. Build the Web platform.	49	Administrative Workstation
	3. Deploy the SlxClient portal	50	Administrative Workstation
	4. Configure the SData portal.	54	Web Host server
	5. Configure IIS performance settings.	54	Web Host server
	6. Enable HTTP Compression.	55	Web Host server
	7. Configure ASP.NET.	56	Web Host server
	8. Configure Application Pool permissions.	56	Web Host server
	9. Define the default document.	56	IIS Server
	10. Configure Windows Authentication.	69	Administrative Workstation

	Task	Page	Computer
	11. Change the user assigned to the Job Service. This task is required for the Web Client but may also apply to LAN Client installations that will include custom jobs for long-running or resource-intensive tasks.	53	Web Host server
	12. Configure roles.	72	Web Client computer
	13. Test the Web site.	73	Web Host server
	14. Create a link from your company's Web site (intranet).	73	Company intranet server
	15. Configure Web Client user computers.	73	Web Client computers

Mobile Client Tasks

In addition to the "Web Tasks" on page 6, implementations that include the Mobile Client require the following tasks.

	Task	Page	Computer
	1. Deploy the Mobile Client portal.	77	Administrative Workstation
	2. Define the default document.	77	IIS Server
	3. Test the Web site.	77	Web Host
	4. Send the Mobile Client portal URL to users.	78	Administrative Workstation

Customer Portal Tasks

In addition to the "Web Tasks" on page 6, implementations that include Customer Portal require the following tasks.

	Task	Page	Computer
	1. Add the Customer Portal User.	82	Administrative Workstation
	2. Set user security.	82	Administrative Workstation
	3. Deploy the Customer Portal.	82	Administrative Workstation
	4. Configure the SpeedSearch Indexes access setting for Public Access (if necessary).	83	Administrative Workstation
	5. (Optional) Enable employees to grant access to Customer Portal.	83	Web Host
	6. Test the Web site(s).	83	Web Host
	7. Create a link from your company's Web site (intranet).	84	Company internet or intranet server
	8. Provide instructions to Customer Portal users on how to configure their computers.	84	Customer Portal computers

Synchronization Tasks

In addition to the “Required Tasks” on page 5, the following tasks are required for all implementations that include Remote users or Remote Offices. If your implementation does not include Remotes, the following do not apply.

	Task	Page	Computer
	1. Configure synchronization transfer profiles for your selected method of synchronization.	87	Administrative Workstation
	2. Start the Synchronization Server.	93	Synchronization Server

Remote User Tasks

In addition to the “Required Tasks” on page 5 the following tasks are required for all implementations that include Remote users. Remote users can access their local database using the Remote Client or Offline Web Client.

	Task	Page	Computer
	1. Set synchronization options and assign a synchronization transfer profile to each Remote user.	95	Administrative Workstation
	2. Create Remote user databases.	97	Administrative Workstation
	3. Deploy the Web site to all Remote Network and Offline Web Clients.	112	Administrative Workstation
	4. Install the Remote Client and/or Offline Web Client.	98 and 113	Remote user computers
	5. Install the Remote user database.	99 and 113	Remote user computers
	6. Run a synchronization cycle on all Offline Web Client computers.	113	Remote user computers
	7. Start the Remote Client and/or Web Client.	100 and 114	Remote user computers
	8. Instruct Offline Web Client users to download the Office Integration Module.	114	Remote user computers

Remote Office Tasks

In addition to the “Required Tasks” on page 5, implementations that include Remote Offices require the following tasks.

	Task	Page	Computer
	1. Configure the Remote Office profile.	103	Administrative Workstation
	2. Add users to the Remote Office.	104	Administrative Workstation
	3. Create the Remote Office database.	104	Administrative Workstation
	4. Install the Web Host at the Remote Office.	105	Remote Office computer
	5. Install the Remote Office.	105	Remote Office computer
	6. Install the Remote Office database.	106	Remote Office Database Server
	7. Deploy Web Portals for the Remote Office.	107	Administrative Workstation
	8. Start the Remote Office Sync Client.	109	Remote Office computer

	Task	Page	Computer
	9. Install the Remote Office Clients and/or Web Clients.	109	Infor CRM Client computers

Back Office IntegrationTasks

In addition to the “Required Tasks” on page 5, the following tasks are required for all implementations that include Back Office Integration.

	Task	Page	Computer
	1. Ensure the pre-requisites are complete: • The Supported ERP system must already be installed • Infor ION must already be installed		
	2. Enable Multi-currency in Infor CRMsee the “Managing Currency” topic in the Administrator Help or the Web Client help for more information		Administrative Workstation
	• Follow the instructions detailed in the Appendix G, “Back Office Integration” on page 133.	133	Multiple

Configuration IntegrationTasks

See Appendix F, “Integrations” on page 131 for information about the integrations supported in Infor CRM.

Optional Tasks

After completing the previous tasks, you can begin using Infor CRM. However, you may want to learn more about the following features to further customize your implementation.

Conflict Resolution You can define the criteria to use during synchronization to determine what changes are kept when more than one user has changed data. Conflict resolution is only necessary if your implementation includes Remotes. See the “Conflict Resolution” topic in the Administrator Help for more information.

Multi-currency If your company has users in multiple countries using different currencies, you can enable multi-currency support. For more information see the “Managing Currency” topic in the Administrator Help or the Web Client help for more information.

Monitor Console The Monitor Console receives and displays information from the Synchronization (Sync) Service. This enables remote monitoring of the status of processes and jobs running on the Sync Server. See the Monitor Console Help for more information.

Sales Processes Sales Processes are groups of steps and procedures that help users manage their Sales pipeline. A sales process shows users the steps to complete while working to make the sale. Processes can also prompt the user to complete activities, such as making phone calls and writing letters. For information on creating and managing Sales Processes, see the “Managing Sales Processes” topic in the Architect or Infor CRM Client Help.

Teams After adding and configuring users, you can create teams containing the users who require access to the same set of accounts. Teams customarily reflect the structure of your company, such as corporate regions, sales territories, or departments. See the “Working with Teams” topic in the Administrator Help for more information.

Back Office Integration

Implementation Checklist

Infor CRM Back Office Extension enables Infor CRM to integrate with your supported ERP system when Infor ION is also installed. Data from the ERP system is displayed in the Web Client interface. See Appendix F: “Back Office Integration” on page 133 for more information.

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

Part I
Administration Tools and Servers

Chapter 2
Preparing Your Environment

Before installing Infor CRM, review and address the system prerequisites outlined in this chapter. This will minimize delays and enable your implementation to be successful.

Infor CRM was formerly Saleslogix. Some installed components and registries have retained the name Saleslogix.

Before You Begin

Review the available documentation:

- *Infor CRM Planning Guide*. Read this manual to help plan your entire implementation.
- *Compatibility Guide*. Use this document along with the requirements outlined in this chapter to ensure your hardware and software meet Infor CRM supported versions.

General Requirements

The requirements listed here apply to all Infor CRM installations.

User Rights and Network Permissions

You must have Administrator rights for the computer on which you are installing Infor CRM components. See your Microsoft documentation for instructions on granting administrator rights using one of the following options:

- Add each user to the local machine's Admin group for the duration of the implementation.
- Use a domain user account that is a member of the domain admin group for the duration of the implementation.
- You do not need administrator rights to run the Infor CRM Client, Infor CRM Web Client, Sync Client, or Mail Client.

The Offline Web Client installation does not require administrator rights if all prerequisites are installed prior to installing the Offline Web Client.

- .TCP/IP must be installed and configured on every computer running Infor CRM. TCP/IP is required as the network communication protocol.
- No debuggers, programs, or screen savers running. Close all programs and turn off all debuggers, screen savers, or anti-virus programs that may interfere with the installation.

Understanding Commonly-Used User Types

The instructions in this document reference several default users and user types. This section explains these users and provides instructions for creating them where necessary.

- **Local System Account:** This default Microsoft Windows account includes the privileges necessary for Infor CRM services. The Local System user has full rights on the local computer, but not domain access. This user must be mapped to an Infor CRM user, usually the Admin user.

  If you plan to run Agents, the Local System Account cannot be used to log on and cycle the Sync Server the first time. You must use a Domain account to log on and run a manual synchronization cycle for Agents to work correctly.

- **SLXService User:** Create this user if you have modified the default settings for the Local System Account or prefer to specify a different user. See "Permissions Required for the SLXService User (without Administrator rights)" on page 14 for more information. Although named "SLXService User" in this document, you may give this user any unique name.
- **WebDLL User:** Create this domain user if your installation includes Web components. See "The WebDLL User" on page 15 for more information. This user is usually mapped to the Infor CRM Admin user. Although named "WebDLL User" in this document, you may give this user any unique name.
- **Admin User:** This is an Infor CRM user and has full permissions to the Infor CRM product and database. It must be mapped to a user such as the Local System Account, SLXService User or WebDLL User.
- **Named User (Network or Remote):** This is an Infor CRM user. Each license enables a single named user to access any number of copies of any Web, Remote, Mobile, or Infor CRM Network Client software. One license is assigned per user for each named user.

See the *Infor CRM Planning Guide* for more information about the user types available in Infor CRM.

Permissions Required for the SLXService User (without Administrator rights)

If you choose to create the SLXService User, you must assign the following required permissions. These permissions apply to Windows 2008R2/2012. You must log on as a user with Administrative rights to configure permissions.

To create the SLXService user

1. Log on as a user with Administrative rights.
2. Set "Access this computer from the Network", "Allow log on locally", and "Log on as a service" rights on the Saleslogix Server, SpeedSearch Server, and Sync Server computers.
3. Give the SLXService user **Full** control to the following registry keys,
   - (**After installing Infor CRM**) Sync Service
     - HKLM\Software\SalesLogix
   - SLXService User
     - HKLM \SYSTEM\CurrentControlSet\Services\Eventlog
     - HKLM\Software\Description\Microsoft\Rpc\UuidTemporaryData
4. Grant the SLXService user security rights to the following directory and file locations:
   - DBEventing Service
     - C:\Windows\Debug\ (Full control)
   - Sync Service and Sync Servers
     - Logging path for each Sync Server (Full control)
     - Library folder (Full control)
     - Documents folder (Full control)
     - Sync Service folder (Full control)
     - Remote Office Sync Logs folder (Full control for Everyone accessing the Remote Office)
     - Remote Office Documents folder (Full control)
     - Remote Office Library folder (Full control)

    - If an alternate location is used for the log files created, then this path must also be enabled for modify (read/write) access.
- (**After installing Infor CRM**) SpeedSearch Service
    - C:\Program Files\Saleslogix\Speedsearch (Full Control)
- Microsoft SQL Express
    - Program Files\Microsoft SQL Server\instance name\Data

      The Windows user for the Infor CRM Remote Client must be given this access. Access is only required for Remote users with a Microsoft SQL Express database.

The WebDLL User

If your installation includes Web components or the Job Server, you must create the WebDLL user. This user is a valid network sign on name with security permissions that allow the Web Host and the Job Service to access all necessary directories.

The WebDLL user has certain minimum security settings required to run the Web components on Microsoft Windows. The exact settings depend on the requirements of your company. The minimum requirements are detailed in this section.

- Individual Infor CRM users do not require any Windows permissions to be set to use the Web Client. All required access comes from the permissions granted to the WebDLL user. Because the IIS default user, IUSR_<machinename>, is created locally, you should create a new user.

For information on creating users, modifying user groups, and assigning folder permissions, refer to the Microsoft Windows online Help.

Use the following settings to create the WebDLL user without Administrator rights on the Web Host. You must log on as a user with Administrative rights to configure permissions.

To create

1. Create the WebDLL User in your company's domain where all servers involved in the implementation are located. Since you must be a domain administrator to do this, typically an IT department creates the user.
    a. For the User name, type **WebDLL**.

       Do not use spaces.
    b. Set password options to:
        - **Password never expires**.
        - **User cannot change password**.
1. If selected by default, *clear* **User must change password at next sign on**.
2. Add the WebDLL user to the following user group:
    - For Microsoft Windows 2008 R2 Server: IIS_IUSRS
3. Set **Full** permissions to the following registry locations:
    - Service User (WebDLL)
        - HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Tracing
        - HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Eventlog
4. Set **Read Only** access to the following registry location:
    - HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\SystemCertificate\Disallowed
5. Set **Read/Write** access to the following locations:
    - Needed for Infor CRM:
        - C:\Windows\Temp folder
        - C:\Windows\SysWOW64\config\systemprofile\" (Microsoft Windows 2012, 2008 R2 Server) (64 bit).
6. **(After installing Infor CRM)** For Windows 2012, set **Full** access to the following location:
        - C:\ProgramData\SalesLogix\Profiler\SalesLogix.Profiler.SLXPROFILERINFO.tmp.
7. Grant access to the IIS metabase and other directories used by ASP.NET.
    a. Open a CMD prompt and navigate to C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727

b. Type: **aspnet_regiis -ga domainname\username**

c. Press **Enter**.

The following messages will appear.

"Start granting slxapp access to the IIS metabase and other directories used by ASP.NET."

8. "Finished granting slxapp access to the IIS metabase and other directories used by ASP.NET."

Software Requirements

- Latest supported Windows Service Pack. Install the latest supported service pack for your Windows platform, available from Microsoft at www.microsoft.com.
- Windows DAC (Windows 7 SP1). Microsoft Data Access Components are required on every computer running Infor CRM.

  If your Database Server contains only the Infor CRM database and no other Infor CRM components, you do not need to install MDAC/Windows DAC on that server.
- Microsoft SQL Express installed on the Administrative Workstation. Microsoft SQL Express is required if you have an Oracle database and there will be Remote users or Remote Offices created, if your remote databases are a different Microsoft SQL Server version than the host, or if the Resync utility will be used.

  If Microsoft SQL Express is installed with Infor CRM, it installs as a SALESLOGIX instance with the sa password set to SLXMa$t3r. If you install Microsoft SQL Express from another source, you must set the sa password to SLXMa$t3r (it is generally blank). To install Microsoft SQL Express with the same configuration settings as Infor CRM, create a setup.ini file in the SQLExpress install folder with the following information. When creating the file, copy the Redist\SQLExpress folder from the Infor CRM media to your local machine (for example, C:\SQLExpress).

  [OPTIONS]

  ADDLOCAL=SQL_Engine

  INSTANCENAME=SALESLOGIX (The INSTANCENAME can be any name you want. Infor CRM defaults the INSTANCENAME as SALESLOGIX.)

  SAPWD=SLXMa$t3r

  SECURITYMODE=SQL

  Run the setup of SQL Express using a command line. At the command prompt, change the location of SQL Express using the following command: setup.exe /qb /settings "location\of\setup.ini" (change "location\of\setup.ini" to the full path to the file, for example, c:\sqlexpress\setup.ini).
- Microsoft SQL Server 2012 and 2014 Native Provider. For Microsoft SQL Server 2012 and 2014, the Microsoft SQL Server Native Providers must be installed on every computer that will connect to an Infor CRM database.
- Microsoft Windows Installer. Windows Installer is required for use with .NET Framework. The Infor CRM installation automatically installs .NET Framework if it is not detected on the computer where you are installing Infor CRM.
- Microsoft .NET Framework with ASP.NET enabled. .NET Framework with ASP.NET enabled is required for .NET Extensions on the Administrative Workstation, Web Host, and Infor CRM Client computers.

  Ensure you install IIS before you install Microsoft.NET Framework; otherwise, ASP.NET is not installed.
- Microsoft Internet Explorer. You must install a supported browser on every computer running Infor CRM.
- Microsoft Word. You must install Word on the Administrative Workstation (or the computer on which you install Architect) for template management and on each Infor CRM Client and Web Client computer for mail merge.
- SAP Crystal Reports. If you plan to create or edit the Sample reports, you must install Crystal Reports on the Administrative Workstation (or the computer on which you install Architect) for report management. The Crystal Reports installation is available with Infor CRM.
- Adobe Acrobat Reader. Required to view Infor CRM documentation.

- The following table shows the software prerequisites that will be installed if they are not detected during the Infor CRM installation. Installing these prerequisites may require your computer to restart.

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		
Microsoft .NET Framework 4.5.2[1]	X	X	X	X	X	X
Microsoft .NET Framework Multi-Targeting Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server Express 2012 RTM (Optional)[2]	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X

- [1] Microsoft .NET Framework v4.5.2 is installed in Integrated model.
- [2] If a version of the Microsoft SQL Server database is already installed, the Microsoft SQL Express, installation will not complete successfully. Decline the option to install if it is offered.

Web Requirements

- Internet Information Services (IIS). IIS 6 Compatibility. If you are running Infor CRM on Windows 2008R2 Server or Windows 2012, enable IIS 6 Compatibility on the Web Host.
  - To enable compatibility, open Server Manager, expand Roles, right click Web Server (IIS) and select Add Role Services. In the Select Role Services list under Management Tools, select IIS 6 Management Compatibility. The following sub-items are automatically selected: IIS 6 Metabase Compatibility, IIS 6 WMI Compatibility, IIS 6 Scripting Tools, and IIS 6 Management Console.
- Firewalls disabled on the Web Host (Windows 2008R2 Server). Firewalls can be active if a rule is added to allow inbound from ports 1433, 1025, and your Infor CRM Web site port.
- Windows Firewall port 11211. Open Windows Firewall and add an exclusion for port 11211. Infor CRM installs the Saleslogix Cache Server, which requires access to this port.
- .Net version 4.5.1 must be installed on the machine that hosts the Infor CRM Web Host when the Web Host uses the following operating systems:
  - Microsoft Windows 2012 and 64 bit: .NET version 4.5.1 must be installed in Server Manager.
  - Microsoft Windows 2008 R2 Server 32 and 64 bit: .NET version 4.5.1 must be installed in Server Manager.
  - Microsoft Windows 7SP1: .NET version 4.5.1 must be installed in Programs and Features.

SData Portal Requirements

The Web Host installation automatically sets up IIS configuration. If you prefer to manually set up your web site instead of using the Web Host install, see the steps for configuring IIS before continuing with the installation.

- SData provides a standard protocol for reading data from and writing data to business applications, either on-premises (server or desktop based) or on the Web.

If your implementation includes Windows Authentication, Job Service, and/or Mobile, but not the Web components, you must still create the WebDLL user, install the Web Host, and configure the SData portal. See page 54 for instructions.

The SData portal requires the following:

- On the Visual Studio development Web server, assign your domain user to a Infor CRM user, as the development server runs under the current logged in user.
- The default authentication model for the SData Portal is Basic Authentication which:
  - Does not require an association between the WebDLL user and a Infor CRM user.
  - Is used with Secure Sockets Layer (SSL).
  - Is required for Infor CRM Mobile and Offline Web Client, and Infor CRM Xbar for Microsoft Outlook functionality.

Process Orchestration Server Requirements

Process Orchestration allows you to create a process to be associated with any entity in Infor CRM. Any entity can be associated to multiple processes. Process Orchestration requires the Process Orchestration Host which executes/monitors the process instances in the Web Client. The Process Orchestration Host is installed with the Web Host, and requires the following:

- .NET Framework 4.0 or later. The Process Orchestration Server will not run using .NET Framework versions earlier than 4.0.
- Disabling IIS Integrated Windows Authentication for the ProcessHost Web site.
- An Infor CRM user must be associated with the same Windows user that is assigned to the application pool for Process Orchestration. Typically, this is the Infor CRM admin user.

  For steps to associate a Infor CRM user to a Windows user, see “Configuring the WebDLL User for Windows Authentication” on page 70.

If your implementation does not include the Web, you must still create the WebDLL user, install the Web Host, and configure Application Pool permissions for the process orchestration portal (see page 47 for instructions). Then refer to the “Implementing Process Orchestration” topic in the Application Architect Help for additional implementation steps.

Windows Authentication Requirements

If you choose to implement Windows Authentication for Infor CRM Client users in your installation, users who are already logged on to Microsoft Windows will be able to access the Infor CRM Clients without having to pass through an Infor CRM Client log on screen. The Microsoft Windows user must be mapped to an Infor CRM user for this to be successful.

Windows Authentication functions and is configured for the Network and Web Clients.

Windows Authentication in the Infor CRM Network Client

In the Infor CRM Network Client, when Windows Authentication is enabled:

- If a Windows user is mapped to a valid Infor CRM Client user, he or she does not see an Infor CRM Client log on page. The Network Client application simply opens.

- If a Windows user is not found to be mapped to an Infor CRM Network Client user, you can configure either of the following:
  - Display a log on screen and require the user to log on manually.
  - Display an error screen.
    In this case the user cannot log on to Infor CRM.

To configure Windows Authentication for the Web Client, you must:

- Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Infor CRM Client user. For more information see “Configuring Users” on page 61.

Windows Authentication in the Infor CRM Web Client

In the Infor CRM Web Client, when Windows Authentication is enabled:

- If a Windows user is mapped to a valid Infor CRM Client user, he or she does not see a Web Client log on page. The Web Client application simply opens.
- If a Windows user is not found to be mapped to an Infor CRM Web Client user, the user cannot access the Infor CRM Web Client through this portal. An error message displays.
- To enable users to log on as the administrator, you must configure and deploy a second SlxClient portal that does not include Windows Authentication.

Note: Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Infor CRM Client user. For more information see “Configuring Users” on page 61.

Other options for Windows Authentication in the Infor CRM Web Client can be configured by editing the Web.Config file and are:

- Windows Authentication off, SData on
- Windows Authentication off, SData off.

For information about these configuration options, see the *Enabling Windows Authentication Access for Web Client Users* topic in the Administrator Help.

To configure Windows Authentication for the Web Client, you must:

- Configure the WebDLL user. See “Configuring Password Self-Service” on page 52.
- Deploy an SData portal. See “Deploying Infor CRM Client Portals” on page 50.
- Configure your Web Server. See “Configuring the Web Server” on page 70.
- Configure your Web Client computers. See “Configuring the WebDLL User for Windows Authentication” on page 70.
- In the Administrator, open the User Profile General tab for each Web Client user and ensure the Use Windows Authentication check box is selected. See the topic called “User Profile General Tab” in the Administrator help.

Windows Authentication in the Infor CRM Mobile Client

In the Mobile Client, users will still see a log on screen when Windows Authentication is enabled.

To configure Windows Authentication for the Mobile Client, you must:

1. Configure Windows Authentication for the Web Client.
2. Deploy the SData portal.
3. In the Administrator, make sure that the User Profile General tab for each Infor CRM user who will also be a Mobile Client user has the Use Windows Authentication check box selected. See the topic called “User Profile General Tab” in the Administrator help for more information.
4. Ensure that the Infor CRM user is associated to a Windows Domain user.

Job Service Requirements

The Job Service is a shared service that enables scheduling single and recurring tasks for immediate or delayed execution. This service executes tasks out of process, and so releases worker threads and memory for client sessions.

- Long running tasks offloaded to the Job Server can run asynchronously. When user sessions do not have to wait for long running processes to complete, fewer time-outs occur.
- Processing/memory intensive tasks offloaded to the Job Server eliminate competition for computing resources. The Job Server runs in a different process from the Web Host and consequently has a separate thread pool. It can be located on a separate server if necessary.

Although it is only required for an Infor CRM Web Client installation (including the Offline Web Client and Web Clients deployed at Remote offices), the Job Server can be consumed by any Infor CRM client when custom jobs are created to do so. Consider this service if your organization uses LAN or Mobile and typically has long-running tasks and/or resource intensive tasks. See *An Introduction to Job Server in Infor CRM.PDF* for more information about creating custom jobs.

The SData portal and the Job Server service may reside on separate machines. The Job Server service is commonly installed on the Saleslogix application server where the “Saleslogix Server” service is installed. Installing the Job Server on the Web Server is not recommended for performance reasons.

The Job Service is installed with Admin Tools and Servers and requires the following:

- The Web Host and the SData portal must be installed, built, and deployed. See “Configuring the Web Host” on page 47 and “Configuring the SData Portal” on page 54 for more information.
- After installation, you must ensure the default Infor CRM user assigned for the Job Server to log on as has access to Infor CRM Application Entities and Activities. Use the WebDLL user after associating it with the Infor CRM Admin user. See “Modifying the Log On User for Job Service” on page 53 for more information.

If you prefer, you can change the Job Server Base Directory (the folder root for the file system deployment) from the default setting. You must do this after installation and then modify the SLXJobServer.exe.config file. Refer to *An Introduction to Job Server in Infor CRM.PDF* for details.

Server Requirements

In addition to the “General Requirements” on page 13, ensure the Server computer(s) meet the following requirements.

- Microsoft SQL Server or Oracle. Your database platform must be installed and running on the Database Server.
- When installing Oracle, ensure that the Oracle OLE DB Provider is installed.

  By default, Infor CRM uses the OLE DB Provider installed with MDAC v2.8. If your implementation uses the SQL 2005 Native OLE DB Provider, you must install that provider on any computer where Infor CRM is installed.

- Logging Folders. Create and share the logging folders as detailed in “Logging Access Requirements” on page 22.
- Trust relationship. Establish a trust relationship if the Database Server is on a different network domain from some or all of the Infor CRM users and components. Ensure that these domains have a trust relationship with each other and can share data.

Microsoft SQL Server

- SQL Server Sort Orders set to 52 or 54. To check sort order information, type sp_helpsort in SQL Server Query Analyzer.
  - Sort Order 52 - Dictionary order, case-insensitive, for use with the 1252 character set.
  - Sort Order 54 - Dictionary order, case-insensitive, accent-insensitive, for use with the 1252 character set.
- SQL Server security set to SQL Server and Windows authentication. Verify this authentication is set on the Infor CRM Database Server.

  To change the authentication mode, open SQL Server Management Studio, right-click the appropriate server, and then click Properties. On the Security tab, set the Authentication to SQL Server and Windows.

- (Recommended for best performance) Microsoft SQL Server Client and Server component versions match. For example, if the Connection Manager uses the Microsoft SQL Server 20012 driver, then the Infor CRM Clients should use the 2012 driver.
- SYSDBA user is not assigned the System Administrators role. If the System Administrator's role within Microsoft SQL Server is selected for the SYSDBA user, you cannot log on to Infor CRM.

Oracle

- Infor CRM Oracle database is placed in its own instance.
- Oracle Provider for OLE DB Components. When installing, ensure that the Oracle Provider version matches your Oracle Server and Oracle Client version.
- Oracle Server, Oracle Client, and Oracle OLE DB Provider component versions match. The major version for all three pieces must be the same or compatibility issues may arise.

Infor CRM Client Requirements

In addition to the "General Requirements" on page 13, ensure the following are set up on each Client computer.

- Microsoft Outlook. You must install Microsoft Outlook if you are using Outlook Integration, Advanced Outlook Integration, or Infor CRM Xbar for Microsoft Outlook (which includes Outlook Sync). Ensure Microsoft Outlook is installed and configured before installing Infor CRM.

  See "Outlook Integration Requirements" on page 22 for additional requirements.
- Small Fonts/Normal Size. Ensure the user's Windows' Display settings are set to Small Fonts or Normal Size (the name of the option varies depending on which version of Windows is installed).

  Access this setting using the Windows Control Panel.
- 1024 x 768 or higher screen resolution. Infor CRM screens are designed for higher resolutions. For optimum viewing, set the monitor resolution to 1024 x 768 or higher.
- (Remote Clients Only) Microsoft SQL Express or Microsoft SQL Server. See the "Microsoft SQL Express installed on the Administrative Workstation" bullet in the "Software Requirements" section for installation details.
- (Oracle implementations only) Oracle Provider for OLE DB Components. You must install the OLE DB components on every computer running Infor CRM for database connectivity.

  When installing Oracle, ensure that the Oracle OLE DB Provider is installed. In addition, your Oracle Server version must match your Oracle Client version.

Web Client Requirements

In addition to the "General Requirements" on page 13, ensure the following are set up on each Web Client user's computer.

- A supported browser. See the Compatibility Guide for supported browsers.
- 1024 x 768 or higher screen resolution. Infor CRM screens are designed for higher resolutions. For optimum viewing, set the monitor resolution to 1024 x 768 or higher.
- Microsoft Outlook. You must install Outlook if you are using Web Client Mail Merge and Outlook Send SLX capabilities.

Remote Office Requirements

In addition to the "General Requirements" on page 13, ensure the following requirement is met if your implementation includes a Remote Office.

- Microsoft SQL Server, Microsoft SQL Express, or Oracle. Your database platform must be installed and running on the Remote Office computer.
- IIS. A Web Server is required to host a Web Remote Office.

Back Office Extension (ICBOE) Requirements

In addition to the “General Requirements” on page 13, ensure the following requirements are met if you are enabling the Back Office Extension features in Infor CRM.

- Install Infor ION. This product is available from the download center.
- Enable Multi-currency in Infor CRM. See “Managing Currency” in the Administrator Help file for more information. The currency code must match your ERP base currency.
- Follow the instructions in the Appendix F: “Back Office Integration” on page 133. The document named Infor CRM Back Office Extension Configuration Guide for Infor ION is also required. This document was installed during the Admin Tools and Servers installation (\\Program Files(x86)\Saleslogix), and can be downloaded from Infor Xtreme (www.infor.com/Inforxtreme).

Logging Access Requirements

Various Infor CRM services and applications need access to the local file system or logging folders to transfer information. The following information applies to both the main office (Host) and any Remote Offices.

- The process running the Saleslogix OLE DB Provider must have Write permissions to the local file system, specifically the “All Users” folder. Write access is necessary for the Provider to write queue files.
- The SLXSystem.exe must have Read/Write permissions to the local file system to read and delete the queue files created by the Provider. This process assumes the rights of the parent process that creates it. Therefore all Infor CRM services or processes that use the Provider or SLXSystem.exe must have local file system access (for example, SpeedSearch Service).
- The SLX Server Service user needs Read/Write permissions to the local file system to write the queue files it receives from the Client SLXSystem.exe. The SLX Server Service also runs the SLXLoggingServer.exe so the service must have Read/Write permissions to the location of the Workgroup Logs.
- The Sync Server, Synchronization Client, and SLXLoggingServer are the only applications that need access to the shared logging path. Network users do not need access to the shared logging path.

Understanding the Logging Folders

The following logging folders must be created and shared for an Infor CRM implementation.

Sync Logs Folder The Sync Logs folder is the root folder for synchronization files. The first time the Sync Server runs, sub folders are automatically created under the Sync Logs folder for synchronization and other functions.

Documents Folder The Documents folder is the root folder for Infor CRM documents and for files attached to accounts, contacts, and opportunities. This folder is also required for Reports in the Infor CRM Web Client.

Library Folder The Library folder is the root folder for the Library system and contains the entire contents of the Library.

SyncService Folder The SyncService folder is used to store the Sync Service configuration file. This folder must be shared with the Administrative Workstation computer and with the computer on which the Synchronization Service is installed. If your implementation does not include Remote users or Remote Offices, you do not need this folder.

Remote Office Sync Logs Folder The Remote Office Sync Logs folder is necessary for implementations that contain a Remote Office. This is the root folder for Remote Office synchronization files. This folder must be shared to allow access by everyone (including the SLXService user).

Remote Office Library Folder The Remote Office Library folder contains all Library documents that Remote Office Network users have access to.

Remote Office Documents Folder The Remote Office Documents folder contains all documents that Remote Office Network users have access to.

Creating the Logging Folders

If your implementation does not include synchronization, the logging folder (Sync Logs) is usually located on the Administrative Workstation (the computer where you install the Administrator). In installations that use synchronization, the Sync Logs folder is best located on the Synchronization Server if it is a dedicated server. If you have a Document server, you can use it for the Library and Documents folders.

To create

1. In Windows Explorer, create the SyncService folder (for example, \\ServerName\SyncService).

   If your implementation does not include Remote users or offices, you do not need to create this folder.
2. In Windows Explorer, create the Sync Logs folder (for example, \\ServerName\Sync Logs).

   Ensure the Logging folder is shared and all Network and Remote users have network access to it. The path must also follow universal naming conventions (UNC), and you must be able to browse to it.

   If you are using synchronization, and more than one Sync Server is required, create separate folders for each sync server (for example, \\ServerName\Sync Logs1, \\ServerName\Sync Logs2).
3. In Windows Explorer, create the following folders:
   - Library (for example, \\ServerName\Library).
   - Documents (for example, \\ServerName\Documents).

The next step...

- If your implementation includes a Remote Office, create the Remote Office folders detailed in the following section.
- If your implementation does not include a Remote Office, share the logging folders as described in “Sharing Folders and Granting Access Rights” on page 23.

Creating the Remote Office Folders

A Remote Office contains a central set of shared folders used for synchronization, library files, and documents. If your implementation includes a Remote Office, you must create the Remote Office folders at the Remote Office site.

Typically, the synchronization folder (RemOffice Sync Logs) is located on the Remote Office Synchronization Client. However, you can create the synchronization folder on a separate file server. The Library and Documents folders can be created on the Remote Office Synchronization Client or a separate document server.

To create

1. In Windows Explorer, create the Remote Office Sync Logs folder (for example, \\ServerName\RemOffice Sync Logs) to store the synchronization sub folders.
2. In Windows Explorer, create the following.
   - Library (for example, \\ServerName\Library).
   - Documents (for example, \\ServerName\Documents).

Sharing Folders and Granting Access Rights

The Infor CRM folders must be shared before users can connect to them from the network.

When sharing folders, select one of the methods described in the following sections:

- “Granting Full Access Rights to All Users”
- “Sharing Folders and Granting Rights to User Groups”

Granting Full Access Rights to All Users

To share folders and assign access rights to everyone, you must:

- Enable file and print sharing.
- Assign the folders to be shared. This includes the SyncService, Documents, Library, Sync Logs, and Remote Office Sync Logs folder.

  This share includes the SLXService user. The SLXService user must have permissions set to Full Control for the Infor CRM folders.

Refer to Microsoft documentation for instructions to share folders and enable file and print sharing.

Sharing Folders and Granting Rights to User Groups

User groups allow you to manage permissions to the Infor CRM folders by group, rather than by individual users. For example, you can create a group of Remote users and assign access rights to the entire group. When a new user is created, you add that user to the group, and the permissions are already defined. This saves time when administering a large number of users.

Creating User Groups

Should you decide to grant access rights by group, you must create global groups on the Windows Server. A global group is available in its own domain, as well as any trusting domain you may have.

- Refer to Microsoft documentation for instructions to create user groups. The following user groups are recommended.

User Group	Represents
SlxAdmin	System Administrator and SLXService user
SlxNetwork	Infor CRM Network users
SlxSync	Synchronization Server
SlxRemote	Infor CRM Remote users

If Remote users need direct access to the main office database, include those users in both the SlxNetwork and SlxRemote user groups. For example, this would be necessary if users work remotely and also dock their laptop when in the office.

Sharing Folders by Group

After creating user groups, you must set the folder sharing rights and permissions for each group. Refer to Microsoft documentation for instructions to set folder permissions. The following user group access is recommended

User Group	Type of Access
SlxAdmin	Full Control
SlxNetwork	Change
SlxSync	Change
SlxRemote	Change

Running Infor CRM as a Restricted User

To control security at a user level, you can create restricted users for Infor CRM. Since Admin rights to the local Windows computer are not required to run the Infor CRM Client, a restricted user with limited rights has full functionality.

Although Admin rights are not required to run Infor CRM, users need permissions to access specific directories on the local computer. You can set permissions using one of the following methods:

- Add the user to the local machine's Power User's group. Although this allows more than the minimum required rights, it requires less administration.
- Set permissions to specific directories. This grants the minimum required permissions but requires more administration. Set permissions to the following:
  - (Read/Write Access) Program Files\Microsoft SQL Server*instance name*\Data folder - this folder is only needed for Remote users running Infor CRM on a Microsoft SQL Express database.
- (Citrix users only) Copy the contents of the Business Objects folder to the Windows\System32 folder.

- Restricted users cannot register custom ActiveX objects contained in some Infor CRM Client views. A user with Admin rights must license and install the necessary components on each Infor CRM Client computer.
- In Microsoft Windows 2012, assign full control permissions for the local SpeedSearch Directory to users running Infor CRM as a restricted user.

Running Infor CRM on a 64-Bit System

When installing Infor CRM on 64-bit systems, be sure you have made the following adjustments to installation.

- The Web Host requires IIS. When Web Host is installed on a 64-bit server, IIS must be running in 32-bit mode. For the Web Host, this setting is applied as part of the installation.
- If you are running Infor CRM on a 64-bit system, you must run the Data Link Manager in 32-bit mode. See "Creating a 32-bit OLE DB UDL" on page 35.
- When setting permissions for the WebDLL user, read the steps under "The WebDLL User" on page 15 carefully to ensure you have enabled access to the locations required in a 64-bit system.
- When your Microsoft Office installation is 64 bit, the Office Integration is not available.
- Although Export to File is supported in a 64-bit environment, in the Infor CRM Windows Client, Export to Excel requires integration with 32-bit Microsoft Office. In a 64 bit environment, it appears as unavailable.
- In the Infor CRM Network Client, Mail Merge requires integration with 32-bit Microsoft Office.

After completing this chapter...

You have completed tasks 1-4 of the "Required Tasks" checklist. Proceed with Chapter 3, "Installing Infor CRM".

Chapter 3
Installing Infor CRM

Before beginning this chapter...

Verify you have installed the prerequisites and created the logging folders as described in Chapter 2, “Preparing Your Environment”.

If you are installing Infor CRM on Oracle, ensure you have created the Infor CRM database as described in Appendix A, “Creating a Database for Oracle”.

Use the instructions in this chapter to...

Install the Infor CRM administration tools and server components. These components are required for all Infor CRM installations.

Understanding Infor CRM Databases

Your Infor CRM Implementation provides two databases: blank (for use as your production database), and evaluation (containing dummy data you can use for demonstrations and evaluations).

Do not use the evaluation database as your production database.

Microsoft SQL Server

Unless you have specified a different default data directory, the databases are installed to the same location as the Master.mdf (typically in the Microsoft SQL Server Data folder. The Data folder is a sub folder under your SQL instance name folder.) If the Infor CRM installation does not find SQL Server and you opt not to allow the Infor CRM installs to install SQL Express, or a Infor CRM database already exists, the databases are not installed..

- If you are using a Microsoft SQL Server database that was installed prior to installing Infor CRM, ensure that the sysdba user exists and is enabled, otherwise the databases may not install correctly. You can use SQL SQL Management tools for this.
- Also be sure to add sysdba to 'master' db and run the 'sysdbafix' script before trying to install the databases.

SalesLogix.mdf This is your production database. The user name for this database is *admin*; the password is *password*.

SalesLogix_Eval.mdf This database contains accounts, contacts, tickets, defects, and so on, for demonstration or testing purposes. You can log on as admin, Lee, Dan, or any other regular user in the database. No password is required.

Creating a database on SQL Server with a name beginning with a number is not supported as a regular identifier, and therefore, not recommended. If you create a Host database using a name that begins with a number, you will receive errors when attempting to create a Remote user or Remote Office database.

The Standard installation installs the Microsoft SQL Server databases if Microsoft SQL Server is detected on the computer on which you are installing the Saleslogix Server.

Oracle

The SLX_Blank.dmp and SLX_Eval.dmp files are used to import data and the database structure to the CRM database.

SLX_Blank.dmp This DMP file provides data that serves as your production database. The user name for the Infor CRM database created from the DMP file is *admin*; the password is *password*.

SLX_Eval.dmp This DMP file imports accounts, contacts, tickets, defects, etc., to your evaluation database for demonstration or testing purposes. You can log on to the Infor CRM database created from this DMP file as admin, Lee, Dan, or any other regular user in the database. No password is required.

If you have an Oracle database, you must create your database manually using the steps outlined in Appendix A, “Creating a Database for Oracle”.

Installing Infor CRM

Install Infor CRM directly from the Infor CRM media or from a network drive. To install from a network drive, copy the entire contents of the media to a shared network directory. The installation steps outlined in this guide assume the main installation browser is active. If the installation program does not start automatically, locate and double-click Setup.exe.

The Infor CRM installations create folders and apply permissions necessary for Infor CRM to function. To avoid unexpected results, Infor recommends contacting Technical Support or your Business Partner before changing default settings on these folders.

Running the Administrative Tools and Servers installation

Depending on your implementation, you may need to run the installation on multiple computers. Use the following instructions to install all components necessary for your implementation (for example, Saleslogix Server, Administrative Workstation, Sync Server, and so on).

If you are installing the CRM database on a separate Database Server instead of the same computer as the Saleslogix Server, run the Server Installation > Install SQL Databases installation on the Database Server before running any other Infor CRM installation on the Saleslogix Server and other computers.

To install

1. On the **Infor CRM Installation** screen, click **Server Installation**.

2. On the **Server Installation** screen, click **Required Administrative Tools and Servers**.

   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.

   - Click **Install** to allow Infor CRM to install the required components.
   - Click **Cancel** to stop the installation.

   For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.

3. On the **Welcome** screen, click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.

   Depending on your configuration, you may need to run the Administrative Tools and Servers installation on multiple computers. If you have not already done so, review the *Infor CRM Planning Guide* for more information on where to install Infor CRM components.

   - Select **Complete** 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.
   - Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
     - **Saleslogix Server -** installs the components that primarily handle logging and licensing for Infor CRM. This is required for all installations.
     - **Administrator -** installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses.
     - **Architect -** installs the component used to customize the Infor CRM Client.
     - **Application Architect** - required to configure and customize the Infor CRM Web components and portals.
     - **Job Server** - installs the service used for scheduling tasks for immediate or delayed execution. This service is required by the Web and Mobile clients for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel.
     - **Messaging Event Server** - enables communication between Infor CRM service components. This is required for all installations.
     - **Cache Server** - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do not install on the SpeedSearch Server, and be sure to install only once per implementation.
     - **SpeedSearch Server -** installs the SpeedSearch Service.
     - **Synchronization Server** - required if your installation will include remote users or a remote office.
     - **.NET Extensions** - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework.
     - **Utilities** - multiple applications to aid with customization and database maintenance.
5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Infor CRM. If you clear this option, set the information for the SLXService user you created as described in “Permissions Required for the SLXService User (without Administrator rights)” on page 14.

     If SpeedSearch indexes include files located on another computer, do not use the Local System Account. SpeedSearch requires a Network user to access information on other computers.
     - **Domain** - Type the network domain where you created the SLXService user.
     - **User Name** - Type the name of the SLXService user (for example, SLXService).
     - **Password** and **Confirm** - Type the SLXService user’s password.
   - Port **Change** button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.
   - **Install Blank and Eval databases if they don’t already exist** (SQL Server Only) - This check box appears if you selected the option to install the Saleslogix Server, or the Complete installation. Unless you previously ran the Install SQL Databases installation, select this check box to ensure the databases are created.

- **Password required for external read-only access** - If necessary, type a password used to allow third-party applications to import Infor CRM data but not allow changes to the Infor CRM database.
- **Password required for external read/write access** - If necessary, type a password used to allow third-party applications to import Infor CRM data and make changes to the Infor CRM database.

For more information on password settings for third-party applications, see the “Understanding Third-Party Access Scenarios” topic in the Connection Manager Help.

- **SQL Server sa password** - If you have a password set on the sa account on the Microsoft SQL Server, type the sa password. The installation requires this password to install and attach the Infor CRM databases.
- **SQL Server sysdba password** - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Infor CRM database.

If you do not enter the sa and/or sysdba password, the databases are not installed.

6. On the remaining screens, click **Install** and **Finish** to complete the installation.
   If your database platform is Microsoft SQL Server and your database is installed on the same machine as the Saleslogix Server, select the Launch Administrator option and proceed with Chapter 4, “Configuring the Infor CRM System”. Otherwise, do not select this option and continue with the following sections to create database connections.
7. If necessary, restart your computer.

Creating Database Connections

If you ran the Custom Installation and installed the Saleslogix Server on the Database Server (Microsoft SQL Server only), Infor CRM automatically creates your database connections.

If your installation includes one of the following scenarios, you must create your database connection manually or modify the default connection. Generally you will create a connection to the blank and evaluation databases.

- If your database platform is Microsoft SQL Server 2012 or 2014, you must modify the default database connections.
- If your database platform is Microsoft SQL Server, and you are installing the Saleslogix Server and Infor CRM database on different computers, you must manually create database connections.
- If your database platform is Oracle, you must manually create database connections.
- If you are running Infor CRM on a 64-bit system, you must run the Data Link Manager in 32-bit mode. See “Creating a 32-bit OLE DB UDL” on page 35.

To create

1. Open the **Connection Manager**.
   For example, on the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Connection Manager**.
2. In the **Connection Manager**, do one of the following:
   - Click **Add** to create a new connection.
   - Select an existing connection and click **Edit**.
3. In the **Connection Name** box:
   a. In the **Name used to refer to this connection** box, type a name for the connection.
      The connection name can be a maximum of 32 characters and may include spaces. Duplicate names are not permitted.
   b. (Optional) To restrict third-party client access through this connection, set the **Read/Write password for this connection**, and if necessary, the **Read-Only password for this connection**. (Click the Change button next to the appropriate box to set the password.)
   c. Click **OK**.
4. On the **Provider** tab in the **Data Link Properties** dialog box, select the appropriate provider for your database platform, and then click **Next**.

- *Microsoft SQL Server 2012*: select **SQL Native Client 11**
- *Microsoft SQL Server 2014*: select **SQL Native Client 11**
- *Oracle*: select **Oracle Provider for OLE DB**

  If the Oracle Provider for OLE DB is not listed on the Provider tab, ensure you have installed the Oracle OLE DB Provider. See "Windows Authentication Requirements" on page 18 for more information.

5. On the **Connection** tab:
   a. For *Microsoft SQL Server 2012* or *2014*: In the **Select or enter a server name** box, type the name of the Saleslogix Server.
   For *Oracle*: In the **Data Source** box, type the Net Service name for your database.
   b. Under **Enter information to log onto the server**, ensure **Use a specific user name and password** is selected.
   c. In the **User name** box, type the user name used to log on to the Database server (for example, sysdba).
   d. In the **Password** box, type the user password (for example, Ma$t3rk3y).
   Passwords are case-sensitive.
   e. Select the **Allow saving password** check box. You must select this option or the connection fails.
   f. For *Microsoft SQL Server*: specify the database to connect to:
      - For *Microsoft SQL Server 2012* or *2014* select the **Select a database** option, and then select the database from the list.
   g. Click **Test Connection** to verify the connection.
   If you cannot connect to the database, verify that the settings are correct (passwords are case-sensitive). Also verify that the database platform service is running on your Database Server.
6. **(Microsoft SQL Server 2012 and 2014)** On the **All** tab:
   a. Double-click **Persist Security Info**.
   b. In the **Property Value** drop-down list, select **True**.
   c. Click **OK**.
   d. Double-click **Integrated Security**.
   e. Click **Reset Value**.
   Data may exist that does not display in the Value field. This value must be reset to ensure that all data is removed.
   f. Click **OK**.
7. **(Oracle Only)** On the **All** tab:
   a. Double-click **Extended Properties**.
   b. In the **Property Value** box, type chunksize=5000.
   You must set the Property Value if you plan to create custom views that will be included when you create a remote database. If the value is not set, the SQL View is truncated on the remote database.
   c. Click **OK**.
8. Click **OK** to save the information and close the **Data Link Properties** dialog box.
9. Click **OK** to save the information and close the **Saleslogix Connection Manager** dialog box.

Creating Client Database Connections for Oracle

After installing a Client application (Administrator, Infor CRM Client, etc.) on Oracle, you must create a Net Service Name in the Oracle Net Configuration Assistant and a database connection in the Data Link Manager.

Creating a Net Service Name

You must create the Net Service Name (also called database alias) on the computer on which you installed a Client application. The Data Link Manager uses this alias to connect to the Infor CRM database.

Ensure that the database connection name is the same for every connection you create on all your Infor CRM Client computers. The names must match exactly for all connections to work.

Refer to the Oracle documentation for instructions to create a database alias.

Creating a Client Database Connection

The Data Link Manager is used to create a connection from the Client computer to the Saleslogix Server. This connection is configured automatically for Microsoft SQL Server installations. However, you must create a connection manually on each computer running Infor CRM on Oracle.

To create

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click the application you want to log on to (for example, Administrator).
2. In the **Please log on** dialog box, click the ellipsis button in the **Log on to** box.
3. In the **Data Link Manager**, click **Add**.
4. On the **Provider** tab of the **Data Link Properties** dialog box, select the **Saleslogix OLE DB Provider** and then click **Next**.
5. In the **Select or enter the Saleslogix Server** box, select the computer on which you installed the Saleslogix Server.

   For Remote users, enter the computer name on which the Remote user's database is installed.
6. In the **Select database name** box, select the name of the connection configured for your database using the Connection Manager.

   See "Creating Database Connections" on page 30 for more information.
7. In the **Infor CRM User Name** and **Infor CRM Password** boxes, type the user name and password used to log on to Infor CRM.
   - When logging on to a third-party application using the Saleslogix OLE DB Provider, these fields allow you to log on using Infor CRM security.
   - If you are not using a third-party application, the user name and password are used to test the connection.
8. Select the **Allow Saving Password** check box. You must select this option or the connection fails.
9. Click **OK**.

Creating a 32-bit OLE DB UDL

If you are running Infor CRM on a 64-bit system and you have installed the provider extensions, you must run the Data Link Manager in 32-bit mode. Use the following steps to configure the Data Link Manager for a 64-bit system.

Both 32-bit and 64-bit machines must run the Data Link Manager and access the Saleslogix OLE DB Provider in 32-bit mode.

To create

1. Using Notepad create a blank UDL file named "test.udl".
2. Save the UDL file to your C: drive.
3. Open the blank UDL file doing one of the following:
   - For a 64-bit machine, run the following command: C:\Windows\syswow64\rundll32.exe "C:\Program Files (x86)\Common Files\System\Ole DB\oledb32.dll",OpenDSLFile C:\test.udl

- For a 32-bit machine, double-click the file in the file manager and run C:\Windows\system32\rundll32.exe "C:\Program Files\Common Files\System\OLE DB\oledb32.dll",OpenDSLFile <Infor CRM install folder>\'test'.udl

4. With the blank UDL open, open the Data Link Manager.

   To open the Data Link Manager, open a Infor CRM application and click the ellipsis button in the **Log on to** box.
5. In the Data Link Manager, create a new database connection and make sure you select the Saleslogix OLE DB Provider on the Provider tab.
6. Save the connection.
7. Move the UDL file to all computers that require a connection to Infor CRM.

   By default, the file should be stored in C:.

Installing Licenses

Before you can install the bundles necessary to configure the database, you must install licenses. The Administrator is used to manage licenses, users, servers, and offices.

Logging On to the Administrator

The following steps are also used when logging on to other Infor CRM Client applications.

To log on

1. Open the Administrator.
   For example, on the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Administrator**.
2. In the **Please log on** dialog box:
   a. In the **Username** box, type **admin**.
   b. In the **Password** box, type the corresponding password for the user name.

      The initial admin password for your production (blank) database is *password*. Passwords are case-sensitive and must be entered in lowercase characters, with no spaces.
   c. In the **Log on to** box, ensure the correct database connection name displays (for example, Infor CRM_Server).

      If necessary, you can add a new connection or change an existing connection using the Connection Manager.
3. Click **OK**.

   If you cannot connect to the database, ensure that the database path is correct in the Data Link Manager.

Adding Licenses

Licenses determine the servers, offices, and users you can add to Infor CRM. See the *Infor CRM Planning Guide* for a description of each available license.

You can add licenses by typing the license number, using copy and paste from a text file, or by loading them directly from a file (right-click, and then click Load from file).

- All implementations require an Infor CRM license (Standard, Advanced, or Premier).
- The Web Host requires the Infor CRM Web Server license.

To open the License Wizard from the Systems view

1. On the **Navigation Bar**, click **Systems**.
2. Click the **Licenses** tab.
3. Right-click, then click **Add License**.

4. Follow the instructions in the wizard dialog boxes to enter your licenses.

See the “Using the License Wizard to Add Licenses” topic in the Administrator Help for more information about adding licenses.

You must upgrade the database to version 8.3 before configuring your office information and to creating users. For information about completing these tasks see “Understanding the Setup Assistant” on page 40.

Configuring the Database

The Blank and Eval databases that ship with Infor CRM v8.3 must be configured. This requires the following steps:

- Install the ICRM v8.3.0.sxb bundle.
- If your database is Oracle, run the OracleFixes.sql script
- Restore the ICRM v8.3.0 project backup to the VFS workspace.
- Install the VFS Actions.zip.
- Run the Infor CRM Conversion Utility.

Installing the ICRM v8.3.0.sxb bundle

The Administrator is used to manage users, servers, and offices as well as to install .sxb bundles.

To install

1. Browse the Infor CRM media, expand the **Upgrades** folder, and copy the **ICRM v8.3.0.sxb** to a convenient location.
2. In the **Administrator**, in the **Navigation** bar, click **Bundles.**
3. In the **Bundle Manager** toolbar, click **Install**.
4. In the **Open** dialog box, browse to the folder where you copied the **ICRM v8.3.0.sxb** bundle in step **1**, and click **Open**.
5. In the **Choose Actions to Install** dialog box, select to install all plugins, and then click **OK**.
6. Click **Yes**, (to replace all), to allow the bundle to replace existing database components.
7. Click **Yes** to release the bundle plugins.
8. Release the plugin to **Everyone** and click **OK**.

Running the OracleFixes.sql script

If your database is Oracle, instruct your Oracle DBA to run the OracleFixes.sql script. This script alters the TargetResponse table.

The script can be run as the sys or sysdba user.

To run the script

1. Open Oracle SQL *Plus Worksheet or SQL Developer.
2. On the **File** menu, click **Open**.
3. Browse to the **OracleFixes.sql** script.
   The script is located in the Oracle folder.
4. To load the script into the Query section, click **Open**.
5. To run the script, click **Execute**.

Restoring the ICRM v8.3.0 project backup to the VFS workspace

Infor CRM provides a project backup file that must be installed (“restored”) to update the database to version 8.3. You follow these steps to create your Infor CRM v8.3 database.

To restore

1. Locate the **ICRM v8.3.0 Project.Backup.zip** file.
   Project backups are located in the Upgrades\Project Backups folder.
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 limitation that requires the path where you save or copy bundles that were created in the Application Architect to be 57 characters or less (including the drive name).
3. Open the **Application Architect.**
4. In the **Project Workspaces** window, select the **VFS project workspace**.
5. Right-click the project, and then click **Restore Project**.
6. Select the **Rebuild Schema from Project** check box.
7. In the **Select Project Backup File to Restore From** dialog box, browse to the location where you copied the **ICRM v8.3.0 Project.Backup.zip** (step 2 above).
8. Click **OK**.

Updating the sitekeys table

On your blank database, instruct you database administrator to run the following query to update the sitekeys table. This is necessary for both Oracle and Microsoft SQL databases to enable the Infor v8.3 Action Items.zip to apply successfully.

To run the script

1. Open **Microsoft SQL Management Studio** or your preferred tool for running SQL scripts.
2. Open the **SITEKEYS** table.
3. Locate the row containing **KEYTYPE=30**.
4. Modify the KEYVALUE column for that column with a value higher than the highest valid in the PICKLIST.ITEMID For example, if the current value is ‘A000114O, modify it to A001114O.

Installing the Infor v8.3 Action Items VFS.zip

To install the bundle

1. Browse the Infor CRM media, expand the **Upgrades** folder, expand the **Project Backups** folder, and then copy the **Infor v8.3 Action Items VFS.zip** to a convenient location.
   Ensure the folder path is as short as possible. There is a folder path limitation that requires the path where you save or copy bundles that were created in the Application Architect to be 57 characters or less (including the drive name).
2. Ensure you have Write permissions to the bundle installation folder.
   Check permissions on the Security tab on the folder properties.
3. In the **Application Architect,** in the **Project Explorer,** right-click the project, and then click **Install Bundle**.
4. Navigate to the folder where you copied the Infor v8.3 Action Items VFS.zip, and then click **Open**.
5. On the **Select Bundle** screen, click **Next.**
6. On the **Select Items** screen, ensure the **Portals** option is selected.
7. Click **Next**, and then click **Finish**.

Replace the Infor CRM Conversion Utility

An updated version of the Infor CRM Conversion Utility is available on the install media. You must copy this version from the media to the location where you installed Infor CRM.

To copy

1. Using Windows Explorer, browse the Infor CRM Media, expand Installs, and then expand the **Conversion Utility** folder.
2. Select and copy **ConversionUtility.exe**,
3. Paste the **ConversionUtility.exe** to the location where you installed Infor CRM.
   The default is \\Program Files (x86)\Saleslogix.

Running the Infor CRM Conversion Utility

The Infor CRM Conversion utility provides the following important actions:

- The App.config also allows you to modify the Sales Order conversion default mappings. There are four sections:
  - "SalesOrderToQuote
  - "SalesOrderItemToQuoteItem
  - "SalesOrderSubItemToQuoteSubItem
  - "SalesOrderAddressToQuoteAddress.

  Each has a TargetProperty and SourceProperty attribute, where TargetProperty represents the appropriate Quote property, and SourceProperty represents the appropriate SalesOrder property.
- It sets the Encoding flag in the DB_ObjectDefinition table for all existing records.
- It converts any existing country codes for addresses to ISO codes
- It creates alias records for any non-standard country codes found by converting the address ISO code. The Infor CRM Web Client contains a feature where you can later map the country codes in the alias file to the ISO codes. See the Infor CRM Web Client topic called “Converting unmatched country aliases” for more information. This is required for the Mail Merge and Back Office Extension features.

To run

1. On the Administrative Workstation, browse to the **ConversionUtility.exe** and **ConversionUtility.exe.config** files. By default, these are in . . .\Program Files\Saleslogix.
2. Open the **ConversionUtility.exe.config using the text editor of your choice.**
3. Scroll to the <connectionStrings> section and change the Initial Catalog value from SALESLOGIX_EVAL to your Saleslogix Connection Manager name.

   For example:

   <connectionStrings>

   <clear/>

   <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabaseAlias;Data Source=localhost;Extended

   Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/> </connectionStrings>
4. Scroll to the <**SalesOrderMappingSection**> and make any necessary modifications to the **SourceProperty** and **TargetProperty**.
5. Save your changes.
6. Double-click **ConversionUtility.exe** to open the utility.
7. In the Infor CRM Conversion Utility interface, select the appropriate check boxes:
   - **Convert address ISO code:** Select this check box to convert the country code in the address records in your database to ISO standards. This is required for the Mail Merge and Back Office Extension features.
   - **Convert Sales Order of Type Quote to new Quote Schema:** Select this check box to enable the SalesOrder action to first create a backup of the Sales Order tables where the following conditions are true:

- SO.IsQuote = true
- SalesOrder to SalesOrderQuote_Backup
- SalesOrderItems to SalesOrderQuotesItem_Backup
- ErpSalesOrderItemsSubItem to SalesOrderQuoteSubItem_Backup
- SalesOrderAddress to SalesOrderAddress_Backup.

After the backup tables are created the records are copied into the appropriate new Quote tables (Quote, QuoteItem, QuoteSubItem, and QuoteAddress).

- **Delete Sales Orders of type Quote and SalesOrderQuote _Backup on completion:** Select this check box to remove all of the SO backup tables as well as all of the SO records and their children records where the condition SO.IsQuote = true and where successfully moved to the appropriate Quote tables.

  Selecting this option is strongly recommended to avoid leaving potential duplicate Quote records in the Sales Order tables.
- **Updating Encoding flag in DB_ObjectDefinition table:** select this check box to update existing records in the DB_ObjectDefintion table to set required encoding for each script.

  Possible values are:
  - ANSI
  - Unicode
  - Both

  Selecting this option is required for cutting remotes and syncing changes to existing remotes, and is strongly recommended for all installations.
- **Create Alias records for missing countries**: select this check box to create an alias file for any non-standard country codes found by converting the address ISO code. The Infor CRM Web Client contains a feature where you can map the country codes in the alias file to the ISO codes. See the Infor CRM Web Client topic called “Converting unmatched country aliases” for more information. This is required for the Mail Merge and Back Office Extension features.

8. Click **Update.**
9. Sign in using the Infor CRM Admin username and password.
10. Click **Close.**

The next step...

- For Microsoft SQL Server installations, proceed with Chapter 4, “Configuring the Infor CRM System”.
- If your implementation included the Job Service and Infor CRM SData portals, you must install the Web Host, build and deploy the portals and modify the WebDll user permissions. See Chapter 5, “Installing the Web Components”.

After completing this chapter...

You have completed tasks 6-9 of the “Required Tasks” checklist.

Proceed with Chapter 4, “Configuring the Infor CRM System”.

Chapter 4
Configuring the Infor CRM System

Before beginning this chapter...

Install Infor CRM as described in Chapter 3, “Installing Infor CRM”.

Ensure you have set permissions as described in “Permissions Required for the SLXService User (without Administrator rights)” on page 14.

Use the instructions in this chapter to...

Configure the Infor CRM system components and set up your main office. These tasks are required for all Infor CRM installations.

Once you have installed the server components, you must log on to the Administrator and complete the following tasks:

- Add licenses.
- Enter Office information.
- (Oracle Only) Apply the Service Pack bundle.
- (Optional) Configure SpeedSearch.
- Configure Infor CRM options.
- Add Customer Service and/or Support information (if you are using the customer service and/or support features).

Logging On to the Administrator

The Administrator is used to manage users, servers, and offices. The following steps are also used when logging on to other Infor CRM Client applications.

To log on

1. Open the Administrator.
   For example, on the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Administrator**.
2. In the **Please log on** dialog box:
   a. In the **Username** box, type **admin**.
   b. In the **Password** box, type the corresponding password for the user name.
      The initial admin password for your production (blank) database is *password*. Passwords are case-sensitive and must be entered in lowercase characters, with no spaces.
   c. In the **Log on to** box, ensure the correct database connection name displays (for example, Infor CRM_Server).
      If necessary, you can add a new connection or change an existing connection using the Connection Manager.

3. Click **OK**.
   If you cannot connect to the database, ensure that the database path is correct in the Data Link Manager.

Understanding the Setup Assistant

The Setup Assistant is used to simplify the installation of licenses, to simplify the configuration of your office information, and to create users based on a Windows user list or pre-configured system templates.

Adding Licenses

You added licenses in “Installing Licenses” on page 33. Unless you have new licenses to add, you can click through this step.

Entering Office Information

After adding licenses, use the Setup Assistant to enter your main office information. This information includes your primary address, shipping address, and phone numbers.

To enter

1. In the Setup Assistant, select **Step 2 - Enter Office Information**, and then click **Run Selected Step**.
2. Type your company information such as division name (if applicable), primary and shipping addresses, and telephone numbers. Only the Company Name is a required field.
3. Click the **Sync Options** tab.
   In the **Shared Paths** section, make sure the **Sales Library** and **Attachments** paths are correctly mapped to the folders you created when configuring logging access. See “Creating the Logging Folders” on page 23 for details.

   If your implementation includes the Web Client, the Attachment path must be set correctly or your Web Client users will not be able to run reports.

4. Click **OK**.

The last step of the Setup Assistant simplifies the process of adding Infor CRM users. The process for adding users is detailed in Chapter 6, “Configuring Infor CRM Users”.

Configuring Infor CRM Options

You can configure the appearance of the Administrator and Infor CRM Client, set default password and Remote database options, and configure other custom options. The options required for a successful implementation are detailed in the following sections.

Refer to the “Configuring Infor CRM Options” topic in the Administrator Help for information on other options.

Setting Accounting Options

Accounting options contain system-level information that allows Infor CRM to communicate with external accounting applications. This information must be configured before database transfer between Infor CRM and the accounting application can take place.

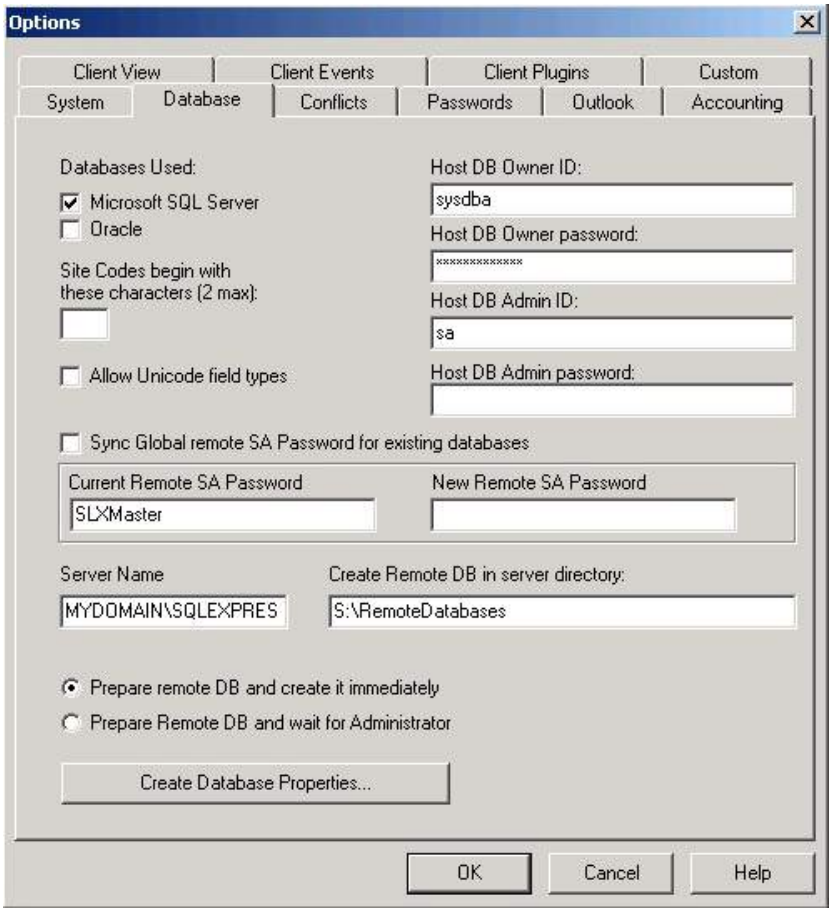
- See the “Setting Accounting Options” topic in the Administrator Help for details.
- For Infor CRM Back Office Extension, see the *Infor CRM Back Office Extension Installation Guide* and the *Infor CRM Configuration Guide for Infor ION* guide available from www.infor.com/Inforxtreme.

Setting Database Options

Database options allow you to configure the default settings used when creating Remote user or Remote Office databases. If you have a Microsoft SQL Server database and your implementation does not include Remotes, you do not need to set database options.

To set

1. On the Administrator **Tools** menu, click **Options**, and then click the **Database** tab.



Option	Action
Databases Used	Select your database type(s) for the main office and Remotes. The database type defaults to Microsoft SQL Server. You must set your database type(s) before using DB Manager.
Site Codes begin with these characters	Type a one- or two-digit prefix for Remote site codes. If you do not use this feature, site codes are randomly generated. Forcing a prefix helps identify the source of a particular file, such as a Remote Office.
Allow Unicode field types	Select to enable field selectable Unicode support. Field selectable-Unicode is limited to specific feature areas. Extending the database for Unicode requires a strong knowledge of Infor CRM and its database schema. Before implementing this feature, you should carefully review the “Understanding Unicode” topic in the Administrator Help for details.
Host DB Owner ID	Type the user name of the Remote database owner. This must be set to sysdba.
Host DB Owner password	Type the sysdba password used by the host database. This is configured automatically when logging on to Infor CRM.
Host DB Admin ID	Type the user name of the database system administrator. This is usually sa, but may be any admin level SQL Server user identity. If the Host database is Oracle, then it must be set to sa.
Host DB Admin password	Type the password corresponding to the Host DB Admin ID user name. For Oracle, leave this field blank.
Sync Global Remote SA Password for existing databases	Select this option to send a new password to a remote database through synchronization. This check box is only available to users who have logged on as admin. During synchronization, if the password set in the Current Remote SA Password box matches the password on the Remote Microsoft SQL Express instance, then the password is changed to the password set in the New Remote SA Password box. The new password is sent to remotes during the next synchronization cycle. **Note** If the SQL Express instance was installed from the Infor CRM media, and you correctly set the SAPWD property, the default instance password is SLXMa$t3r.
Server Name	Displays the machine name of the server. This field is Read Only for a SQL Server host, and is blank for an Oracle host. For Oracle, set this value to a computer where Microsoft SQL Express is running (for example, the administrator's computer).
Create Remote DB in server directory	Type the path to the location where Remote databases will be created. The location of the folder can be on the Database Server, the Administrative Workstation’s Microsoft SQL Express instance, or any Microsoft SQL Server where the appropriate permissions have been provided (for the sa or similar user). Use the format drive letter:\shared_folder_path. Do not include the computer name. • The folder must be shared. • If you are creating remote databases on the Microsoft SQL Server Host, ensure the permissions for Creator Owner are set to a minimum of Change.
Prepare Remote DB and create it immediately	Creates and runs the DTS file. The DTS file creates the remote database. This is the recommended option.

Option	Action
Prepare Remote DB and wait for Administrator	Creates and saves the DTS file. This enables you to run the DTS file and create the database at a later time. This setting is not recommended unless you are an experienced Microsoft SQL DBA. This method requires a user interface and scheduler to connect to the database and run the DTS package.

2. Click **OK**.

Understanding E-Mail Integration

Infor CRM is integrated with Microsoft Outlook to allow users to share information between the two applications.

Feature and Availability	Allows users to:	Availability
Standard Outlook Integration	• Add Infor CRM Contacts to Outlook	Network only
	• Use the Send to CRM button in Outlook to record information to Infor CRM	Network and Web
	• Save Outlook attachments to Infor CRM	Network and Web
	• Record to Infor CRM History from Outlook in one click	Network and Web
	• Drag and drop from the Outlook Inbox to Infor CRM History	Network and Web
	• Use the Infor CRM Address Book in Outlook	Network and Web
	• Attach documents from the Infor CRM Library to an Outlook e-mail	Network and Web
	• Attach a Infor CRM Contact vCard in Outlook	Network only
Advanced Outlook Integration	• Use Outlook Attendee availability in Infor CRM • Schedule meeting requests in Infor CRM and Outlook (even for non-Infor CRM users) • Use the Outlook Calendar in Infor CRM • Flag Outlook e-mail received from Infor CRM Contacts	Network only. Advanced Outlook Integration is not available for the Web.

Activating Advanced Outlook Integration

When Advanced Outlook Integration is activated, the following features are enabled. All other Advanced Outlook Integration features require no activation.

- The Attendee Availability tab appears when a user schedules a meeting or phone call in the Infor CRM Client, which automatically places the request on the users' Infor CRM and Outlook calendars.
- When a user accepts a meeting invitation in Outlook, the meeting is automatically placed on the user's Infor CRM and Outlook calendars.

Internet Only Mode is not recommended for Advanced Outlook Integration.

To activate

1. On the Administrator **Tools** menu, click **Options**, and then click the **Outlook** tab.
2. Select the **Activate Advanced Outlook Integration** check box.
3. Select how attachments using Send SLX are saved with a history record.
   - **Save attachments as individual files** - Attachments to e-mail are saved as individual files on the Attachments tab for the e-mail activity record (in History). If the user answers "Yes" to the prompt which asks

if the user would like to save attachments to the account or contact that is associated to the e-mail, the individual files are saved as attachments.

- **Bundle attachments with e-mail message (MSG format)** - The e-mail is attached as an MSG file to the history record. If the user answers “Yes” to the prompt which asks if the user would like to save attachments to the account or contact that is associated to the e-mail, the MSG file is saved as an attachment.

4. Configure Internet domains that should be excluded from some of the features of Advanced Outlook Integration.

   When you add a domain, e-mail messages are not recorded to history for users in that domain and e-mail messages from users in the domain do not contain the “Flag for Follow up.”

   a. Click **Add**.

   b. In the **New Domain Entry** dialog box, type the domain name.

      Use the format company.com or employee@company.com. Domain exclusion settings are case-sensitive.

   c. Click **OK**.

      After you add a domain exclusion, you can deactivate, edit, or delete it by selecting the domain and clearing the check box or clicking the appropriate button.

Additional configuration is required for Standard Outlook Integration. Configuration steps are detailed in Chapter 7, “Installing Network Clients”, and Chapter 8, “Configuring the Web Client”.

Adding Address Lists to the Outlook Addressing Tab

Adding Infor CRM Address Lists to the Outlook Addressing tab allows users to perform contact name resolution. Contact name resolution occurs when a user types a contact name in the To, Cc, or Bcc fields in an e-mail message. Outlook then reconciles the contact name with the information in the Infor CRM Address List. In addition to contact names, you can add Account and/or Opportunity Address Lists to reconcile Infor CRM account, opportunity, ad-hoc groups, and user names.

This section applies to Standard Outlook Integration in a Network environment. The following steps are not required if you are implementing Advanced Outlook Integration or Standard Outlook Integration on the Web.

To add

1. In Microsoft Outlook, on the **Tools** menu, click **Address Book**.

   The Address Book dialog box appears.

2. On the **Tools** menu, click **Options**.
3. In the **Addressing** dialog box, click **Add**.
4. In the **Add Address List** dialog box, scroll to the Infor CRM Address Book listing, and select an address list (for example, Contacts).
5. Click **Add**.
6. Continue adding the appropriate Infor CRM address lists, and when finished, click **Close**.
7. In the **Addressing** dialog box, click **OK**.
8. Close the **Address Book** dialog box.

Adding Customer Service and Support Information

If you are using customer service and/or support features, you must complete the Service/Support tab on the Office Information dialog box. Use this tab to set the hours of operation for your business and to determine how tickets are assigned.

To add using the Administrator

1. On the Administrator Navigation Bar, click **Systems**.
2. Click the **Offices** tab, double-click your main office in the grid, and then click the **Service/Support** tab.
3. In the **Open** and **Close** boxes, select the time your normal business hours start and end.

   The Hours of Operation area defines the time used for certain reports and follow-up activities.

4. In the **Time units in minutes** box, type the smallest billable time unit to use for tracking the time spent on a ticket.

5. If your company includes the weekend as part of the regular work week, select the **Work weekends** check box.
6. In the **Ticket Assignment Options** area, select one of the following:
   - **Unassigned** - Tickets are left unassigned until a user views the call and assigns it.
   - **Logged-in user** - Tickets are assigned to the user that saves the ticket.
   - **Auto-assignment** - Tickets are assigned to the user or team associated with an Area. If an Area has no associated user or team, the ticket is left unassigned. Area values are configured in "Creating Area, Category, and Issue Lists" on page 66.
7. Select the **Default user or team assigned to account overrides Ticket Assignment Options** check box if you want the Default User/Team selected on the Infor CRM Client > Account > Notifications tab to override the Ticket Assignment Option.

   For example, if you set the Ticket Assignment Option to Logged-in user, and select this check box, any tickets created for an account that has a Default User/Team set in the Infor CRM Client will be assigned to the defined user/team. Any accounts that do not have a Default User/Team set, will be assigned to the logged-in user. If this check box is cleared, new tickets for an account are assigned to the logged-in user even if the account has a user/team selected as the default for new tickets.
8. Under **SpeedSearch**, choose whether or not to use an approval process to determine which new tickets and defects are added to SpeedSearch.

   Refer to the "Understanding the SpeedSearch Approval Process" topic in the Administrator Help for more information.
9. Click **OK**.

To add using the Web Admin

1. On the Web Client Navigation Bar, click **Administration** and then click **Office Profiles**.
2. Click the **Office Profiles** tab, double-click your main office in the grid.
3. Set your office hours:
   a. Click the **Office Hours** tab.
   b. In the **Open** and **Close** boxes, select the time your normal business hours start and end.

      The Hours of Operation area defines the time used for certain reports and follow-up activities.
   c. In the **Time units in minutes** box, type the smallest billable time unit to use for tracking the time spent on a ticket.
   d. If your company includes the weekend as part of the regular work week, select the **Work weekends** check box.
4. Set your Service and Support options
   a. Click the **Service/Support** tab.
   b. In the **Ticket Assignment Options** area, select one of the following:
      - **Unassigned** - Tickets are left unassigned until a user views the call and assigns it.
      - **Logged-in user** - Tickets are assigned to the user that saves the ticket.
      - **Auto-assignment** - Tickets are assigned to the user or team associated with an Area. If an Area has no associated user or team, the ticket is left unassigned. Area values are configured in "Creating Area, Category, and Issue Lists" on page 66.
5. Under **SpeedSearch**, choose whether or not to use an approval process to determine which new tickets and defects are added to SpeedSearch.

   Refer to the "Understanding the SpeedSearch Approval Process" topic in the Administrator Help for more information.
6. Click **Save**.

   To set the Default User/Team to override the Ticket Assignment Option, you must do so in the Administrator as described in "To add using the Administrator" in step 7.

Understanding SpeedSearch

SpeedSearch allows users and external customers to search for information stored in the Infor CRM database, such as tickets, standard problems, procedures, attachments, Library documents, and external documents on your network. An index is a collection of files or records that a user can search against.

The Advanced SpeedSearch license is required to search the History and Activity indexes.

Typical implementations include only one SpeedSearch Service. However, if your implementation includes multiple Saleslogix Servers and databases, you should install additional instances of the SpeedSearch Service on separate machines. Then, you must use a configuration utility to match each SpeedSearch Service with the appropriate Saleslogix Server and database connections.

If you have more than one SpeedSearch Server or for more SpeedSearch information, see the following topics in the Administrator Help.

- To configure SpeedSearch for multiple databases, see "Updating the SpeedSearch Service Configuration".
- For a description of the default indexes, see “Standard SpeedSearch Indexes”.
- For detailed steps on creating new file system and database indexes, see “Managing SpeedSearch Indexes”.
- To change the default index schedules or create new schedules, see “Managing SpeedSearch Schedules”.
- To understand how SpeedSearch information synchronizes with Remotes, see “Understanding SpeedSearch and Remotes”.

Maintaining Database Security

After installing and configuring Administrator, you should change passwords to maintain maximum security. For security reasons:

- Change the administrator user password when you configure your users. See the “Changing a User’s Password” topic in Administrator Help for more information.
- Change your database password using SQL Server Management Studio or DBA Studio.

  After changing the sysdba password in SQL Server Management Studio or DBA Studio, you must change the password in the Connection Manager on the Saleslogix Server. See the Connection Manager Help for detailed instructions.

After completing this chapter...

You have completed tasks 11-15 in the “Required Tasks” checklist. If your implementation includes the Web components or the Job Server, proceed with Chapter 5, “Installing the Web Components”.

If your implementation is Windows only but your users will require access to the Infor CRM Address Book, insert VCard, insert ContactCard, and insert Library doc in Microsoft Outlook, you must install the Web Host and build and deploy portals. Proceed with Chapter 5, “Installing the Web Components”.

Otherwise, proceed with Chapter 6, “Configuring Infor CRM Users”.

Chapter 5
Installing the Web Components

Before beginning this chapter...

Ensure the Admin Tools and Servers network components are installed, configured, and working correctly as detailed in Part I of this guide.

Use the instructions in this chapter to...

Install server components and deploy your Web site. These tasks are required for all Infor CRM Web installations, including Remote Offices and Offline Client Users.

The Infor CRM Web components provide the infrastructure supporting the portals needed for the following functionality:

- Infor CRM Web Client
- Infor CRM Xbar for Microsoft Outlook (includes Outlook Sync)
- Web Client reporting
- Job Service
- SData
- Infor CRM Mobile

The Infor CRM Web components are:

- Web Host: required for users to access Infor CRM functionality via the Web
- Cache Server: stores Web data which allows the cache to be real-time. Installation for this piece is located in the Admin Tools and Servers install. You can install it on the machine that will accommodate the Web Host, or on the Application Server. and it can be installed before the Web Host is installed. Do no install on the SpeedSearch Server, and be sure to install only once per implementation.

Configuring the Web Host

The Web Host enables users to access Infor CRM functionality via the Web. Larger implementations require additional Web Hosts and/or virtual servers. (For more information, see “Scaling the Web Implementation” on page 127.)

This installation:

- Installs the Web components and Web content files.
- Automatically creates a Web site if you select the Create Web Site check box during the installation.

To install

1. You must log on as the local administrator to install the Web components on each machine.
2. On the **Infor CRM Installation** screen, click **Server Installation**.

3. On the **Server Installation** screen, click **Web Host on IIS**.

   If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor CRM to install the required components or Cancel to stop the installation.

4. On the **Welcome** and **License Agreement** screens, read the information, accept the agreement, and then click **Next**.
5. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Select **Complete** to install the Web Host.
   - Select **Custom** to install only the Web Host. Use the **Custom Setup** screen to change the installation location.

   The Cache Server is part of the Admin Tools and Servers installation, but is usually installed on the Web Host. If you install the Cache Server on a server other than the Web Host, you must manually configure the web.config file to access the Cache Server computer. See the “Configuring the Cache Server” topic in the Application Architect help for details.

6. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **Use an existing web site** - If you want the installation to use an existing Web site, click this button and select the Web site name.
   - **Create Web Site** – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals.

     If you prefer to perform Web site configuration manually, clear the Create Web Site check box and follow the instructions in Appendix E, “Advanced Web Host Configuration”.
   - **Enter a Web site name** – Type the name of the Web site that will appear in IIS. The default name is Infor CRM.
   - **Port** – Enter the port number that the Infor CRM Web site will use. Note the port number for future reference. You must use port number 1025 or greater. The default is 3333.
   - **Domain** – Enter the network domain where you created the WebDLL user as described in “The WebDLL User” on page 15.
   - **User Account** – Enter the name of the WebDLL user. The default value is *WebDLL*. If you used a different name, type it exactly as you did when you created it.
   - **Password** and **Confirm Password** – Type the WebDLL user’s password.
   - **Configure Infor CRM Database** - Clear this check box if you do not want to connect to the Infor CRM database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled.
     - **Saleslogix Server** – Select or type the name of the computer on which you installed the Saleslogix Server.
     - **Saleslogix Database Alias** – Select or enter the name of the connection to the Infor CRM database.
     - **Search for servers on port** - Enter a port. By default, this is set to port number 1*706*.
     - **User Name** – Enter a Saleslogix Server user name (such as Admin).
     - **Password** – Enter the Saleslogix Server password for the Infor CRM user.
7. On the remaining screens, click **Install** and **Finish** to complete the installation.

Enabling the Windows Remote Clients Portal to Display

Infor CRM v8.3 adds a new portal to support SData for LAN Remotes users and LAN Remote Offices. If your implementation includes LAN Remote Users or Remote Offices, to enable this portal to display after the upgrade, you must now delete the PortalDeployments.xml.

To delete the xml file

1. Sign in to **Application Architect**.
2. In the **Menu** bar expand **View**, and then click **Virtual File System Explorer**.

3. In the **Virtual File System Explorer**, expand **Configuration**, and then expand **Global**.
4. Right-click **PortalDeployments.xml** and then click **Delete Selected**.
5. Close and then re-open the Application Architect.
6. In the **Menu** bar expand **View**, and then click **Deployment Explorer**.
7. Expand **Deployments**.
   Remote Sales Client and Windows Remote Client should both be visible options under Deployments.

Hosting the Web Client and Customer Portal help files locally

The Web Client and Customer Portal user help files are hosted by Infor at an external location and are available to users over the internet. If you prefer to build and deploy these files internally as part of the Web Client and Customer Portal portals, you can do so. For instructions on how to perform this task, see the Application Architect help file topic called *Upgrading Customized Help*.

If your installation will include Offline Web Client users, they will be unable to access help while they are not connected to the internet unless you build and deploy help files internally.

Applying the ICBOE for Mobile Bundle

If your installation will include enabling both the Infor CRM Back Office Extension integration with a supported ERP system and the Mobile Client, install the ICBOE for Mobile Bundle.

For more information about enabling Infor CRM Back Office Extension features, see Appendix F: Back Office Integration.

To install the ICBOE for Mobile Bundle

1. Open the **Application Architect**.
2. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
3. Browse to the location where you saved the **ICRM BOE Mobile v2.0.zip** and open the **Bundle** folder.
4. Select **ICRM BOE Mobile v2.0.zip** and then click **Open**.
5. On the **Select Bundle** screen, click **Next**.
6. On the **Select Items** screen, ensure the **Portals** option is selected.
7. Click **Next**, then click **Finish**.

Activate the ICBOE for Mobile custom module

Infor CRM Back Office Extension (ICBOE) for Mobile adds functionality as a custom module. If your Mobile deployment will include ICBOE, you must activate that module to enable ICBOE features to be included as part of the Mobile portal build process.

For more information about enabling Infor CRM Back Office Extension features, see Appendix F: Back Office Integration.

To activate the custom module

1. In the **Application Architect,** open the **Project Explorer.**
2. Expand the **VFS** node.
3. Expand the **Portal Manager.**
4. Double-click the **Saleslogix Mobile Client** portal.
5. In the **Mobile Portal Information**, on the **Custom Modules** tab, select the **ICBOE for Mobile** check box..

If the Custom Modules tab is blank, ensure that the ICBOE for Mobile bundle had been installed.

Enabling Multi-currency on the Mobile Client

If your implementation includes Multi-currency, and you have users on the Mobile Client, you must complete the steps in this section.

To enable multi-currency on the Mobile Client

1. In the **Application Architect,** open the **Project Explorer.**
2. Expand the **VFS** node.
3. Expand the **Portal Manager.**
4. Expand the **Saleslogix Mobile Client**., **SourceFiles**, **Products**, **argos-Saleslogix**, **configuration**.
5. Double-click **production,js.**
6. Scroll the bottom of the file and locate '**multiCurrency**'.
7. Change the setting from '**false'** to '**true**'.
8. In the Application Architect menu bar, click **Save All**.

If you already deployed the Saleslogix Mobile Client Portal before modifying the production.js, you must reset IIS and re-deploy the **Saleslogix Mobile Client** Portal

Building a Web Platform

You must build the Web platform before you configure or deploy Web application files.

To build

1. Open the Application Architect.
2. On the **View** menu, click **Project Workspace Manager**.
   The Project Workspaces window opens and the default Infor CRM Web project workspace appears (*VFS on server:saleslogixdb*).

   The server is the name of your Web server, and the Infor CRM DB is the name of your Infor CRM database.

3. Double-click the default project workspace.
   The Project Explorer window opens and the project you selected appears in a tree view.
4. Click the project, and then on the **Build** menu, click **Build Web Platform**.
   Failure to build the Web platform before deploying will result in errors.
5. If necessary, on the **View** menu, click **Output Window** to view the build status.

Deploying Infor CRM Client Portals

The Application Architect Deployment Explorer allows you to create deployments that consist of Targets (destinations) and Portals (configurations). A deployment is used to configure a portal, or Web application, for deployment to a specific target or destination.

Typically, Web portals are deployed to localhost on IIS. However, you have the option of deploying the Web portals to a Web site you create during Web Host installation or to a Web site you create using IIS.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. Expand **Deployments**, and then double-click the appropriate deployment name. The following default portal groups are available:
   - **Core Portals** - contains the SlxClient, ProcessHost, SData, and SlxJobService portals. The ProcessHost and SlxClient portals are dependent on each other; although the Process Host is not necessary for the Web Client to function. The SlxJobService portal requires the SData portal.

- **Customer Portal** - contains the Customer Portal portal.
- **Mobile Client portal(s)** - contains the Mobile Client portal. If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click **OK.**
  Be sure to deploy both the Mobile portal and the ICBOE for Mobile portal if your installation includes ICBOE for Mobile.
- **Remote Sales Client** - contains the SlxClient portal and the SData portal. You must deploy this portal if your implementation will include Remote Clients or Remote Offices.

3. In the **Name** box, type a name for the deployment.
4. In the **Description** box, type a description for this deployment.
5. (Optional) Select the **Use this deployment for debugging** option to set this deployment as your default deployment.

   This option allows you to use the Run button on the toolbar to perform a one-click deployment of all portals you designate in a default deployment.
6. In the **Deployment Targets** tree view, click **IIS**.

   The IIS Target Settings appear.
   a. In the **Server** box, type the name of your Web Host server.

      By default, this is localhost; however, you can deploy to any Web Host server.
   b. In the **Base Directory** box, type the location where the files generated for the Web server will be saved.

      The default is ...\inetpub\wwwroot. If necessary, click the ellipsis button to browse for and select a different directory path.

      The Job Server default Base Directory is %ALLUSERSPROFILE%\Sage\ Scheduling\Tenants. If you change this default, you must change the tenantRoot key value in the SLXJobServer.exe.config file. Refer to *An Introduction to Job Server in Infor CRM.pdf* for details.

   c. In the **Port** box, type the port number for your Web Host server. 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.
   d. In the **App Pool** box, type the name of the application pool for your Web site.

      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 the Process Host portal, you can use the same IIS application pool used by the Infor CRM Client portal.
   e. Ensure the **Deploy Target** check box is selected. This indicates the target is active and should be deployed.
   f. (Process Host and SData only) Ensure the **Restore Virtual Directory Settings on Update** option is cleared.
7. Click the **SlxClient** tab:
   a. In the **Virtual Directory** box, type the alias name for the virtual directory. The default Virtual Directory is the portal name. For example, SlxClient, SLXCustomerPortal, and so on.

      If you are configuring the SData portal, do not change the virtual directory value.
   b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory.
   c. Select the **Deploy Portal** option.

      This indicates the portal is active and should be deployed.

      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.

8. When deploying the Core Portals, repeat step 7 for the ProcessHost and SData portal tabs.
9. In the **Deployment Targets** tree view, click **SlxJobService (File System)**.
   a. In the **Base Directory** box, type the location where the files generated for the Job Service will be saved.
   b. The default is ...%ALLUSERSPROFILE%\Sage\Scheduling\Tenants. If necessary, click the ellipsis button to browse for and select a different directory path.
10. On the **SlxJobService** tab:

a. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory.
b. Select the **Deploy Portal** option.
   This indicates the portal is active and should be deployed.

11. Click **Save**.
12. Click **Deploy All**.

When the Output Window indicates the deployment is finished, define the default document for the Web site.

For more Process Orchestration information, refer to the "Implementing Process Orchestration" topic in the Application Architect help.

Re-applying 8.2 Images

Installing a non-core bundle created on a version of Infor CRM (Saleslogix) prior to version 8.2 will over-write the new icons delivered in version 8.2. Examples of these kinds of bundles include a custom bundle from your Business Partner, or an Infor CRM Add-On component such as Infor CRM Advanced Analytics. If this occurs, you can re-apply the new icons by applying the bundle named 8.2 Images VFS.zip located in the Bundles folder on the Infor CRM Media. For more information about applying VFS bundles, see step 63 in the guide called *Upgrading to Infor CRM v8.2.PDF* located in the Documentation folder on the Infor CRM Media.

Configuring Password Self-Service

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.

The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file.

When editing the appSettings.config file, be sure to do so in the VFS. If you edit it in the file system, your changes may be overwritten if the appSetting.config file is redeployed.

To enable password self-service

1. Open the **Application Architect** and expand the **Project Explorer.**
2. Expand **Portal Manager>SlxClient>Support Files**, and then double-click **appSettings.config**.
3. Scroll through the file to locate "**Defines the settings for sending email**".
4. Edit using the instructions in the appSettings.config file for guidance.
5. Save your edits,
6. Deploy the SlxClient portal.
7. If necessary, repeat these steps to turn Password Self-service on for the Customer Portal.

Note To use such email services as Gmail and Hotmail, the enableSSL setting must be set to True both in the appconfig settings and also on the mail service being used.

Mapping non-standard country codes to an ISO code

Infor CRM version 8.3 adds support for two digit ISO country codes. Previously, users were not constrained to select one supported code for country codes on addresses. They could also add an alternative code of their choice. Consequently, a variety of country codes within the Infor CRM database records are possible. For example: USA and US.

Running the Conversion utility (page 36) captures all non-conforming country codes in an Alias table, from which you must map them to the appropriate ISO code. This is important to support Mail Merge and for Back Office Extension Business Object Documents (BODs) to function correctly.

To map the country code aliases to ISO codes

1. Sign in to the **Infor CRM Web Client** as the **administrator.**
2. In the **Nav** bar, click **ADMINISTRATION**.
3. Select **Countries**.
4. In the **Country Tasks** pane, click **Match Orphan County Aliases**.
5. For each record in the list, click the drop-down arrow and select an alias from the list.
6. Click **OK**.
   The Alias is added to the Aliases tab on the country's detail view.

Configuring the WebDLL User for Windows Authentication

You must configure the WebDLL user for Windows Authentication to allow the Infor CRM Web Client to open a connection to the CRM database. This task must be completed even in installations that do not include Windows Authentication for Infor CRM Network and Web Client users.

To configure

1. Open the Administrator.
2. On the Navigation Bar, click **Users**.
3. In the **Users** view, double-click the **Admin** user name, and then click the **General** tab.
4. Select the **Use Windows Authentication** check box.
5. In the **Windows ID** box, click the Find button.
   The Please select a Windows user to match the Infor CRM user dialog box appears.
6. In the **Add Name** box, type your server name and WebDLL user name, and then click **OK**.
   For example, servername\WebDLL.
7. In the **Import user data** box, click **No**, and then click **OK**.
8. Set permissions to allow the WebDLL user to alter the DNS on the domain.
   To configure Windows Authentication for Web Client users, setspn commands must be executed by a user that has rights to modify the active directory. This permission can be removed from the WebDLL user after running the setspn commands.
   If you have a DNS admin user with proper permissions, you can omit this step.

Modifying the Log On User for Job Service

The Job Service must be able to log on as an Infor CRM user, and that user must have access to Infor CRM Application Entities (such as Leads and Opportunities) and Activities. By default, the user assigned to the Job Service is the Local System Account user. After installation, you must set the Job Service to log on as the WebDLL user after making sure the WebDLL user is mapped to the Infor CRM Admin user. If your implementation includes Remote Office(s), ensure there is a trust relationship between the domain at the Main office and the domain at the Remote office.

If you are using the WebDLL user and have already completed "Configuring Password Self-Service" on page 52, begin at step 8.

To configure

1. Open the Administrator.
2. On the Navigation Bar, click **Users**.
3. In the **Users** view, double-click the **Admin** user name, and then click the **General** tab.
4. In the **Windows ID** box, click the Find button.
   The Please select a Windows user to match the Infor CRM user dialog box appears.
5. In the **Add Name** box, type your server name and user name, and then click **OK**.

For example, servername\WebDLL.

6. In the **Import user data** box, click **No**, and then click **OK**.
7. Set permissions to allow the WebDLL user to alter the DNS on the domain.
8. Open Windows Services and right-click the **Job Service**.
9. Click **Properties**.
10. In the **Job Service properties** dialog box, click the **Log On** tab, and select the **This account** option button.
11. Click **Browse**.
12. Specify the Location.
    For example, the domain where you created the WebDLL user.
13. Type the name of the domain user credentials specified in step 5.
    In this example, the WebDLL user.
14. Restart the Job Service and verify that it started successfully.

Configuring the SData Portal

The SData portal provides RESTful data access to the Saleslogix database through SData feeds. It also provides a communication front-end to the synchronization service used to integrate with accounting systems and to the Job Server. The SData portal is also required for Infor CRM Xbar for Microsoft Outlook functionality, Windows Authentication, and Infor CRM Mobile.

- "Windows 2012 and 2014" on page 54

Windows 2012 and 2014

No manual configuration steps are required. Integrated app pools (used in Infor CRM version 8 and later) do not require manual handler mapping setup. Any other settings are performed by the deployment.

If you are using Windows Authentication, see the topic "Enabling Windows Authentication Access for Web Client Users" in the Administrator Help for additional configuration steps.

Configuring for Performance

This section contains recommendations for optimizing your Web site performance.

Configuring IIS Settings for Performance

In order to cache, and therefore improve performance, use the following IIS settings for the css, images, and libraries subdirectories in each Infor CRM Client portal that you deploy.

To configure for IIS7.x

1. In IIS Manager, expand **Web Sites**, and then expand the Web site containing the SlxClient portal you want to configure for performance.
2. Expand **SlxClient** and click the **css** subdirectory folder.
3. In the IIS section, open the **HTTP Response Headers** item.
4. In the Actions panel, select the **Set Common Headers**... link.
5. Select the **Expire Web Content** check box.
6. Select **Expire after** and set the expiration for 365 days.
   Sending a query more frequently will impact performance. If you often customize files in the css, images, and libraries directories, you can either set a shorter expiration period or else users may need to clear the browser cache to get changes.

7. When you are finished, click **OK**.
8. Repeat steps 2-6 for the images, jscript, and libraries subdirectories, and then click **OK**.

Enabling HTTP Compression

If your Web site(s) use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.

You must be a member of the Administrators group on the local computer to enable compression.

IIS 7 with IIS 6 Compatibility

Use the following steps to enable HTTP compression on IIS 7 with IIS 6 compatibility.

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.

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.

To enable

1. Open IIS Manager, and select your Infor CRM Web site.
2. Under **IIS**, double-click **Compression**.
3. Select the **Enable dynamic content compression** check box.

   If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box.
4. In the **Actions** pane, click **Apply**.
5. If necessary, modify the **ApplicationHost.config** file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.

   In IIS 7 the configuration file replaces the Metabase Explorer compression values used in IIS 6. For more information, see the Microsoft IIS Web site at http://www.iis.net/ConfigReference.

   - Example Configuration Settings:

```
<httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files"
maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false"
>
<scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10"/>
<scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10" />
<staticTypes>
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</staticTypes>
<dynamicTypes>
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</dynamicTypes>
</httpCompression>
```

Configuring ASP.NET

Microsoft .NET Framework with ASP.NET enabled is required on the Web server and the required version is installed as a prerequisite to your Infor CRM installation. The Application Architect automatically configures the necessary portal settings, so no manual configuration steps are necessary.

Configuring Application Pool Permissions

You must configure the Application Pool Permissions for your Web Site. The default Web site is Infor CRM, unless you change it during the Web Host installation.

The recommended Identity for the Application Pool is configured for the WebDLL user. The WebDLL user is typically associated to the Infor CRM admin user to run the process orchestration and SData service portals. This association is set up in the Administrator.

To configure on Microsoft Windows 2008R2 Server and 2012 Server

1. Open **Internet Information Services (IIS) Manager**.
2. Expand the local computer, and then click **Application Pools**.
3. Right-click **Infor CRM** (or the name of your Infor CRM Web site), and then click **Advanced Settings**.
4. Under **Process Model**, select **Identity**, and then click the ellipsis button.
   The Application Pool Identity dialog box opens.
5. Select **Custom account**, and then click **Set**.
   The Set Credentials dialog box opens.
6. In the **User name** box, type the **Domain\WebDLL** user name.
   Ensure you include Domain\ in the user name.
7. In the **Password** and **Confirm password** boxes, type the WebDLL user's password.
8. Click **OK**, and then click **OK** again.

Defining the Default Document

Default documents can be a directory's home page or an index page containing a site document directory listing. You must be a member of the Administrators group on the local computer to define a default document.

To define

1. In IIS, expand the **Web Sites** directory, and then expand the Web site where you deployed the Web Client portal.
2. Right-click the appropriate virtual directory, and then click **Properties**.
   For example, the virtual directory for the Web Client is SlxClient.
3. Click the **Documents** tab.
4. Ensure the **Enable default content page** check box is selected.
5. Click **Add** to add a new document to the list.
   The Add Content Document dialog box appears.
6. In the **Default Content page:** box, type the page name, and then click **OK**.
   For example, the default content page for the Web Client is Default.aspx.
7. Click **Move Up** to move the document to the top of the list.
8. Click **Apply**, and then click **OK**.

Deploying internal help file portals (Optional)

The Web Client and Customer Portal help files are hosted by Infor at an external location and accessed by your users over the internet. If you prefer, you can build and deploy internal help file portals and set the Web Client and Customer Portals to call those files instead of the hosted version. You may want to consider this in the following scenarios:

- If you plan to customize your Web Client online help.
- If your implementation includes Offline Web Clients, as they will be unable to access the hosted help without an internet connection.
- If your users have access to an intranet but not open access to the internet.

To implement on-prem help

1. Apply the ICRM_WebHelp_Files.zip VFS bundle.
2. Deploy the portal
3. Set the Help URL.
   a. Sign in to the Web Client as a user with administrative permissions.
   b. On the **Office Profile Detail view Help tab**, in the **Help Domain URL** box, type the location of the help files. For detailed steps see the Web Client Help file "Office Profile Help Tab".
4. Click **Save**.

After completing this chapter...

You have completed tasks 1-11 in the "Web Tasks" checklist. Proceed with Chapter 6, "Configuring Infor CRM Users".

Check the Infor Xtreme Knowledgebase for required updates to Infor CRM v8.3.

Sign in to the InforXtreme Portal web site: www.infor.com/inforxtreme.

See KB 1702240 for more information.

Chapter 6
Configuring Infor CRM Users

Before beginning this chapter...

Add licenses and configure the system as described in Chapter 4, “Configuring the Infor CRM System”.

Use the instructions in this chapter to...

Create and configure Infor CRM users. These tasks are required for all Infor CRM installations.

When creating Infor CRM users, you must add new users and modify the user profile.

Planning for Infor CRM Users

Before adding new users, you can create departments, administrative roles, and security profiles that can be assigned to individual users. Administrative roles and security profiles help define what information is available to the user and what tasks they can perform.

For detailed steps to create departments, administrative roles, and security profiles, see the following topics in the Administrator help.

- Managing Administrative Roles
- Creating a Department
- Security Profile Manager

The Web Client also contains administrative features that allow users with the appropriate security access to manage competitors, departments, lead sources, literature items, pick lists, products, packages, users, teams, and Web security (roles).

For more information on the administrative features available in the Web Client, see the following Web Client help topics:

- Adding a User
- Working with Teams
- What are Roles and Secured Actions?

Understanding the Admin User

Infor CRM contains an Administrator user type which is the default user profile created for the system administrator. The system administrator has full access to all features and functions in the system when logging on as admin.

The Administrator user profile cannot be modified in Administrator with the same access as other Infor CRM users (Network, Remote, and so on). Access on the General tab is restricted except for the E-mail and Use Windows Authentication boxes and the Change Password button. The following tabs are not visible and cannot be edited:

- Service / Support
- Teams
- Sync

Admin user access is restricted to ensure the system administrator is not included in your company's security model.

Creating Users

Before creating users, determine the best method of configuring the user's profile for your company's size and structure.

If you plan to add several users with identical profiles (for example, the same department, division, manager, security settings, and so on), Infor CRM recommends you use a user template. Templates are recommended because they significantly reduce administration time.

When creating users, you can apply an Infor CRM user template, or a custom template you create, which applies the appropriate settings to each user. User templates do not consume a license and cannot log on to Infor CRM.

The following options are available for adding users. See the appropriate topic in the Administrator Help to add users to your implementation.

Creation Method	Description	Help Topic
Add new users based on an existing user template	You can add new users based on an existing user template or a custom user template you create.	Administrator help file > Creating a User Template
Create Infor CRM users based on existing Windows' users	If you want your existing Windows' users to also be Infor CRM users, you can import your Windows' user information to Infor CRM. During this process, you can select an existing user template to configure user profile settings.	Administrator help file > Importing Windows Users/Matching Infor CRM Users to Windows Users
Import users from a comma-delimited text file	If your company maintains user information in another application, you can export the information and import it to Infor CRM to add users. During this process, a user template can be applied to configure user settings not found in the import file.	Administrator help file > Importing Users from a CSV File Web Client help file > Importing Users
Create users individually	If you have a small number of users, or each user requires a distinct profile with settings that differ substantially, you can add users individually and configure each profile as appropriate.	Administrator help file > Adding a User

Configuring Users

If you create a user from a template, from an existing Windows' user, or import the user information from another application, you must complete additional configuration steps before the user can log on.

If your installation includes Remote users, additional options are configured in Chapter 12, "Configuring the Remote Client". Remote user options cannot be configured until you complete various synchronization configuration steps.).

Use caution when assigning the Integrations role as it enables users to edit and add integrations without limits. User access to Integrations should be limited to Authentication Services and Sync History.

To configure

1. On the Administrator Navigation Bar, click **Users**.
2. In the **Users** view, double-click a user to open the profile.
3. If necessary, select the **Use Windows Authentication** check box. In the **Windows ID** box, select the name the user enters to log on to Windows.

   With Windows Authentication, users are automatically logged on without entering their Infor CRM user names or passwords.
4. In the **Username** box, type the name the user will use when logging on to Infor CRM.

   The user name is required and cannot contain spaces or an apostrophe. For Remote users, the user name must also follow the Rules for Regular Identifiers specific to the version of Microsoft SQL Server that you are using to create Remote databases. The Remote user name must follow these rules as it is sent to the Microsoft SQL Server or Microsoft SQL Express instance to be used as part of a Remote database name.
5. In the **Name** box, enter the user's name.

   If you selected the Update Infor CRM user information with Windows information check box on the Import Windows Users dialog box, the Username and Name boxes are pre-filled with Windows information. This information does not need to be changed.
6. In the **E-Mail** box, enter the user's e-mail address.
7. Select the **User is a Manager** check box if the user is a manager whose name should appear in the Manager list.
8. In the **User Type** box, select the user type.
9. Click the **Employee** tab.
10. If necessary, in the **Accounting ID** field, type the user's accounting identification code. (This is the ID used by the accounting software.)
11. Click the **Teams** tab.

    The Teams tab allows you to create user teams and add or remove the user from system teams. User teams allow users to access accounts owned by another user. For example, if you want Lee to have access to all Dan's accounts, you can add Lee to Dan's user team. System teams group users together so that all team members have access to the same accounts.
12. In the **User Team** section, click **Add** to add other users to this user's team.

    Users you add to this user's profile can access all accounts owned by the main user (the user whose profile you are editing).
13. In the **Field Security of selected user** box, select a security profile for the user selected in the User Team section. This profile only applies when accessing accounts owned by the main user (the user whose profile you are editing).

    Field security never applies to accounts owned by an individual when that individual is the user accessing the accounts.
14. Click the **Calendar** tab.

    The Calendar tab sets permission rights for users to view and modify other user's calendars.
15. In the **Other Calendars** section, click **Add Users** to set access for this user to add, edit, delete, or sync activities for another user.
16. In the **This User's Calendar** section, click **Add Users** to set access for other users to add, edit, delete, or sync activities to this user's calendar.

17. Click **OK**.

This functionality is also available in the Web Admin. Sign on to the Infor CRM Web Client and see the following Web Client help topics for more information:

- Adding a User
- Importing a User
- Copying Profile Information

Setting Access to Customer Service Management

If necessary, you can give users access to management functions in the Infor CRM Client. If you are using customer service, you may want to allow users to manage options for ticket entry, time tracking, setting auto-assignment, managing area, category, and issue lists, user defaults, and ticket rates.

The following steps detail the options that can be set for customer service management. For details on other functions, see the “User Profile Function Security Tab” topic in the Administrator Help.

To set function security options

1. On the Administrator Navigation Bar, click **Users**.
2. In the **Users** view, double-click the user that you want to give access to customer service management options.
3. Click the **Function Security** tab, expand the **Tools** menu, and then expand the **Manage** menu.
4. Double-click the appropriate options to give access to this user:
   - **Customer Service Defaults** - Allows the user to access the Manage Customer Service Defaults dialog box which contains options for ticket entry and time tracking.
   - **AreaCategoryIssue** - Allows the user to manage the Area, Category, and Issue lists. Area, Category, and Issue lists are used to classify tickets and defects.
   - **Customer Service Options** - Allows the user to access the Manage Customer Service Options dialog box, which contains options for setting auto-assignment, User Defaults, and Ticket Rate options.
5. Click **OK**.

This functionality is also available in the Web Admin. Sign on to the Infor CRM Web Client and see the following Web Client help topics for more information:

- Managing Area/Category/Issue Values
- Managing Defect Activity Rates
- Managing Ticket Activity Rates
- Setting Customer Service Options.

Setting Permissions for Integrations

Integrations allow communication between Infor CRM and external systems and services. In some cases, a user with administrative privileges must implement an integration before it can be available to users.

The ability to view Sync History is part of the Standard User role. If users require access to other Integrations actions, for example the ability to authorize an integration, it is best practice to add those actions to the Standard User role or creating a new role that includes those actions.

The Integrations role is not recommended for standard users. Once a user is assigned to the integrations role it is possible for that user to edit and add integrations without limits. User access to Integrations should be limited to Authentication Services and Sync History.

After completing this chapter...

You have completed tasks 16-17 in the “Required Tasks” checklist. Proceed to Part II: “Installing Infor CRM Clients”.

Part II
Installing Infor CRM Clients

Chapter 7
Installing Network Clients

Before beginning this chapter...
Create and configure users as described in Chapter 6, “Configuring Infor CRM Users”.

Use the instructions in this chapter to...

Install the Infor CRM Client for Network users. These tasks are required for all Infor CRM Network installations.

The Infor CRM Client can be installed on each user’s computer using the Client installation. The standard installation includes Typical and Custom options which allow you to install all components or choose the components necessary for your implementation.

Installing the Network Client

Network Clients are the computers running Infor CRM that access the main database through a direct connection or wide-area network. Depending on your installation type, see the following instructions:

To install

1. On the **Installation** screen, click **Client Installations**.
2. On the **Client Installation** screen, click **Install Network Client**.

   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.

3. On the **Welcome** screen, click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Click **Complete** to install the most common components.
   - Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
5. On the remaining screens, click **Install** and **Finish** to complete the installation.
6. After installation, you must start the Infor CRM Client.

Starting the Infor CRM Client

Before starting the Infor CRM Client on Oracle, you may need to create a Client database connection on each Client computer. See “” on page 37 for instructions.

After installation, the user who installed Infor CRM must log on to the Client computer(s) for the first time and launch each of the following applications. This process creates the necessary registry entries for each application.

- If the standard user has installation rights, he or she can log on and begin using the Infor CRM Client.
- If the standard user does not have rights to install Infor CRM, an admin user must start the Client application. This is because the Infor CRM Client must write to restricted areas of the registry. After an admin user has logged on and run the Client, a standard user can read from the registry's restricted area.

The Infor CRM installation creates connection information in the Current User area of the registry. Therefore, if the user logging on to the Client is not the user who installed the Client, a new database connection must be created.

Creating Area, Category, and Issue Lists

Before users begin working with tickets and defects, you must create custom lists for the Area, Category, and Issue fields. The Area, Category, and Issue lists contain information specific to your company that is used to describe the problem or issue documented by a ticket or defect.

The Area, Category, and Issue lists are linked in a hierarchy. The Area you select determines the options available for the Category, and the Category you select determines the options available for the Issue.

The Area, Category, and Issue lists are used to reduce administration time when users are creating tickets and defects. If you are not using the customer service or support features, you do not need to create the Area, Category, and Issue lists.

To create

1. On the Infor CRM Client **Tools** menu, point to **Manage**, click **Customer Service Options**, and then click the **Area/Category/Issue** tab.
2. Click **Add**.
3. In the **Area** box, type a short description (limited to 64 characters) for an area value that is applicable to your company's business. For example, you could type "Software".

   The Area provides a high-level description of the customer's problem (on a ticket) or the type of defect.
4. In the **Category** box, do one of the following:
   - Select a category that is appropriate for the area.
   - Type a short description (limited to 64 characters) for a category that is appropriate for the area. For example, in Step 3 you created the Area of Software, so the Category might be the name of the software manufacturer.

   The Category value provides more detailed information about the cause of the customer's problem and is grouped with a specific Area value.
5. In the **Issue** box, do one of the following:
   - Select an issue value that is appropriate for the category.
   - Type a short description (limited to 64 characters) for an issue.

   The Issue value provides even more detailed information about the customer's problem and is grouped with a specific Category value.
6. Select the **Ticket** check box if you want the items to be available in the Infor CRM Client and Web Client Ticket views.
7. Select the **Defect** check box if you want the items to be available in the Defect view.
8. Select the **Customer Portal** check box if you want the items to be available in the Customer Portal Ticket view.
9. Click **OK**.
10. If necessary, select the **Issue text must match a list item** check box on the **Area/Category/Issue** dialog box.

    When this option is selected, the user must type or select an Issue that already exists. When cleared, a user can type a new value in the Issue box in the Infor CRM Client and Web Customer Portal.
11. Repeat steps 2-10 as necessary to create all area, category, and issue values for your company.
12. Click **OK**.

Creating the Contact Sync Group

If your implementation includes Standard Outlook Integration you must create an ad hoc group. Contacts in this group synchronize between Infor CRM and your Outlook. You can give the group any convenient name. The name used in these instructions is Contact Sync.

To create

1. Open the Infor CRM Client.
2. Open the Contacts List view.
3. Select the contacts you want to synchronize with Microsoft Outlook.
4. Right-click the selected contacts, and then click **Add Selected Members to New Group**.
5. In the Query Builder **Name** box, type *Contact Sync*.
6. In the **Display Name** box, type *Contact Sync*.
7. Click **OK**.
8. Click **Close**.

Assigning the Contact Sync Group

After creating the Contact Sync group, you must specify that group to be used to transfer information between Microsoft Outlook and Infor CRM.

To assign

1. On the Infor CRM **Tools** menu, click **Options**.
2. Click the **Lookups and Groups** tab.
3. In the **Sync Configuration** section, click **New**.
4. In the **Contact Sync Group** dialog box, click **Choose Group**.
5. Select **Contact Sync**, and then click **OK**.
6. Click **OK**.

After completing this chapter...
You have completed tasks 18-23 in the "Required Tasks" checklist.
If your implementation includes the Web Client, proceed with Chapter 8, "Configuring the Web Client"
If your implementation does not include the Web Client but does include remotes, proceed with Chapter 11, "Configuring Synchronization".
If your implementation includes Infor CRM Xbar for Microsoft Office, see "Installing Xbar for Microsoft Outlook" on page 121.

Chapter 8
Configuring the Web Client

Before beginning this chapter...

Install and configure the Web Host as described in Chapter 5, “Installing the Web Components”. In addition, restart all servers involved in the implementation.

Use the instructions in this chapter to...

Configure the Web Client. These tasks are required for all Infor CRM Web installations.

The Infor CRM Web Client is highly customizable using the Application Architect. You can rapidly build, customize, manage, and deploy coded and codeless Web application solutions. After building and deploying the Web Client, you must configure various settings on the Host and Client computers.

For more information, refer to the “Common Tasks in Application Architect” topic in the Application Architect help.

Configuring Windows Authentication

Windows Authentication allows Web users to automatically log on to the Web Client using their Microsoft Windows logon credentials. This method uses a cryptographic exchange with the user's Web browser to confirm the identity of the user.

When Windows Authentication is enabled:

- Users do not see an Infor CRM Web Client log on page.
- To enable users to log on as the administrator, you must configure a second Web Client implementation that does not include Windows Authentication.

Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Web Client user. For more information see “Configuring Users” on page 61.

To configure Windows Authentication you must:

- Configure the WebDLL user
- Configure your Web Server

- Configure your Web Client computers

The following instructions configure Windows Authentication for Web Client users to prevent logging on manually if the Windows user is not mapped to a user in Infor CRM. This method is referred to as “Forms”. It attempts to log the user on automatically but displays an error message if the user information is not found. For additional configuration scenarios, see the “Enabling Windows Authentication Access for Web Client Users” topic in the Administrator Help.

Configuring the WebDLL User for Windows Authentication

You must configure the WebDLL user for Windows Authentication to allow the Infor CRM Web Client to open a connection to the CRM database. If you have not already completed this task, see the steps in Chapter 5, “Installing the Web Components”.

Configuring the Web Server

The following instructions configure Windows Authentication for Web Client users.

To configure

1. On the Web Server computer, log on as a domain administrator or as a user with rights to modify the Active Directory.

   This user should be the Application Pool user.
2. Add the WebDLL user to the IIS_IUSRS group.
3. Make sure all Infor CRM Web Client users who will be using Windows Authentication have the following permissions to the SlxClient and SData folders:
   - Read
   - Write
   - Execute
4. Add Windows Authentication security.
   a. In the Server Manager, under **Web Server (IIS)**, click **Add Role Services**.
   b. In the tree view under **Security**, select **Windows Authentication**.
   c. Click **Install**.
5. Run setspn.exe to manually modify the service account's SPN information to run correctly with Windows Authentication.

   Service Principal Names (SPNs) are used to locate a target principal name for running a service. The setspn.exe is included in Windows 2008R2.
   a. Open a Command Prompt window.

      Do not use a colon or second forward slash in the following setspn commands. Type the commands exactly as documented.

   b. At the command prompt, type the following command. setspn -A http/server.domain.com domain\username

      The server.domain.com is the fully qualified machine name, the domain is the Infor CRM domain, and the user name is the user that has rights to modify the active directory. Use the username created in “Configuring Application Pool Permissions” on page 56.
   c. At the command prompt, type the following command. setspn -A http/server domain\username

      The server is the machine name, the domain is the Infor CRM domain, and the user name is the user that has rights to modify the active directory. Use the username created in “Configuring Application Pool Permissions” on page 56.
   d. At the command prompt, type the following command. setspn -L username

      This step checks to ensure the SPN entries created in steps b and c have been registered correctly. If you do not see the two entries, repeat steps b and c.

6. On the Web Server computer, enable Windows Authentication in IIS. This method restricts Web Client user from logging on if the user is not found in Infor CRM.
   a. Open IIS Manager, and click **Advanced Settings**.
   b. In the **Advanced Settings** dialog box, click the **Physical Path Credentials** ellipsis.
   c. In the **Connect As** dialog box, select **Application user (pass-through authentication)**, and then click **OK** twice.
   d. Double-click **Authentication** and verify that only **Windows Authentication** is enabled.
      By default, Infor CRM uses Basic Authentication.
   e. Right-click **Windows Authentication**, and then click **Edit**.
   f. Click **Advanced settings**.
   g. Ensure that the **Enable Kernel-mode authentication** check box is not selected.
   h. Click **OK.**
   i. Modify the Web.config file.
      - In Application Architect, make the following edits in the web.config file in the SlxClient portal. For more information about editing the web.config file see the "Editing Configuration Files" topic in the Application Architect Help.
      - Modify the web.config file by commenting out the sections labeled **Windows Authentication – off** and removing the comment markup from the sections labeled **Windows Authentication – on.**
      - The three sections that must be modified are the **<authentication>**, **<httpModules>**, and **<modules>**.
        Comment markup begins with "<!--" and ends with "-->"
   j. (Optional) Remove the Infor CRM Log on screen.
      When a user logs off from Infor CRM, a log on button displays that allows the user to log back on. To remove this button, you must edit the Logoff.aspx file.
      Change the line:

```
<div id=”LogoffFormButtonPanel”><a href=”~/Login.aspx” id=”loginLink”
runat=”server”><%= GetLocalResourceObject(“ReturnToLoginMessage”) %></a></div>
```

      To

```
<div id=”LogoffFormButtonPanel”><a href=”~/Default.aspx” id=”loginLink”
runat=”server”><%= GetLocalResourceObject(“ReturnToLoginMessage”) %></a></div>
```

7. Enable Windows Authentication for the SData Portal.
   a. Open **Internet Information Services (IIS) Manager**.
   b. Select the **SData** virtual directory, and click **Advanced Settings**.
   c. In the **Advanced Settings** dialog box, click the **Physical Path Credentials** ellipsis button.
   d. In the **Connect As** dialog box, select **Application user (pass-through authentication)**, and then click **OK**.
   e. Click **OK** to close the Advanced Settings dialog box.
   f. Double-click **Authentication** and set the following:
      - Disable anonymous access.
      - Enable Windows Authentication.
      - Enable Basic Authentication
        By default, Infor CRM uses Basic Authentication.
   g. Right-click **Windows Authentication**, and then click **Advanced Settings**.
   h. In the **Advanced Settings** dialog box, verify that **Enable Kernel-mode authentication** is not selected, and then click **OK**.
   i. Under the **SData** folder, open and modify the **Web.config** file.

Configure the Web Client Machines

The following instructions configure Windows Authentication for Web Client users accessing Infor CRM. Use one of the following procedures as appropriate for your browser type.

To enable on Internet Explorer

1. On each Web Client computer, open your browser.
2. On the **Tools** menu, click **Internet Options**.
3. Click the **Security** tab, select **Trusted Sites**, and then click **Sites**.
4. In the **Add this Web site to the zone:** text box, enter either the Web Server name or the IP address to the Web Server (http://10.40.0.35).

   For users using Windows Authentication, the URL address must include the windows.aspx page (http://10.40.0.35/slxclient/windows.aspx).

To enable on Firefox

1. On each Web Client computer, open your browser.
2. In the **Location Bar**, type *about:config*, and then press **Enter**.
3. If a warranty message opens, click **I'll be careful, I promise!**.
4. Double-click the **network.automatic-ntlm-auth.trusted-uris** preference.
5. In the **Enter string value** box, type your Web Host URL using the format http://hostserver:port.
6. Click **OK**.

Configuring Roles

A role determines what functionality a user can access in the Web Client. Roles use secured actions to control access to user interface elements such as pages, menus, menu items, toolbars, and buttons. When you control access to individual user interface elements, you can control access to actions such as editing, deleting, or printing.

By default, users created in the Web Client are assigned the Standard User role. This role allows add, edit, and delete permissions to Web Client non-administrative entities such as accounts, contacts, and opportunities.

Users created in the Administrator are not assigned a role and role security cannot be set in the Administrator. If you create new Web Client users in the Administrator, you must assign users to the Standard User role.

To assign

1. Open the **Users List** view in the Web Client.
2. Select the users that should have add, edit, and delete permissions to non-administrative entities in the Web Client.
3. In the User Tasks pane, click **Add to Role**.
4. In the **Select Role** dialog box, lookup and select the **Standard User** role, and click **OK**.
5. Click **OK**.

Review the "What are Roles and Secured Actions?" topic in the Web Client help to understand the default roles and how you want to apply them to users.

Testing the Web Site

After you have deployed a Web portal and defined the default document, you are ready to test the Web site.

To test

1. Ensure the following services are running on the Web Host: Indexing Service, IIS Admin Service, and World Wide Web Publishing Service.
2. Reset IIS.
3. Depending on where you deployed the Web Client portal, use one of the following URLs to test the Web site. If you deployed the Web Client portal to:
   - *localhost (your Web server)*, the format is *http://localhost/SlxClient* or *http://server/SlxClient*.
   - *localhost (your Web server)* with Windows Authentication enabled, the format is *http://server:port/SlxClient/Windows.aspx*.
   - a Web site and port you designated during Web Host installation, or to another Web site you created manually in IIS, the format is *http://server:port/SlxClient*.

     The server is the Web Host server and port is the port number you designated during Web Host installation.
4. When the Infor CRM Web Client sign on page appears, enter your **User Name** and **Password**.
5. (Optional) Infor CRM Web components provide optional extended features in the Web Client that may require additional components to be downloaded.
   - On the login screen, click **Enhance Infor CRM**.
   - In **Options**, click the **General/Search** tab and click **Enhance Infor CRM**.
   - If prompted to install Office Integration and you want to use this feature, click **Yes**.
6. Click **Log On**.
7. Log off the Infor CRM Web Client.
8. Send the Web Client URL to users or create a link from your company's Web site (detailed in the following section).

Linking from Your Company's Web Site

When you are ready to make the Web Client accessible to users, you can create a link on your company's Web site (typically an intranet site) to provide access. For example, you may want to display a link that reads "Infor CRM" in a prominent location on your intranet site.

Create the link in the following format:

<A HREF="*webservername/virtualdirectoryname*">Infor CRM</A>

The server is the name of your Web Host machine. The virtual directory name is *SlxClient*, unless you specified a different name in the Web portal Deployment Properties in Application Architect.

Configuring Client Computers

To ensure the Web Client functions correctly, you must configure several options on each user's computer.

To configure

1. Ensure the user is a member of the local Power Users or Administrators group.

   This allows ActiveX controls to work correctly if this user enables and downloads extended features on the Web Client Log On page.
2. Ensure the Scrollbar Item setting is set to 17 or less.
   - (Microsoft Window 2008R2) The Scrollbar option is set in the Control Panel > Personalization > Window Color > Window Color and Appearance > Item drop-down menu.

3. The default browser settings should be used for the Infor CRM Web site. In addition to your browser defaults, the following options are required.

The option locations and wording may vary depending on your browser version. For more information on these options, refer to your browser's Help.

Browser Option	Setting
Internet Explorer	
Temporary Internet Files>Settings	Check for newer versions of stored pages **Automatically**.
Security>Trusted sites>Sites	• Add the Infor CRM Web site (SlxClient) to the trusted sites list. Type http:// followed by the Web Host server name for the Web Client site (for example, **http://server**). • Turn OFF protected mode for trusted sites (Microsoft Windows 2008). • Enable **Script ActiveX controls marked safe for scripting**. • Enable (or set to prompt) **Initialize and script ActiveX controls not marked safe for scripting**.
Security tab	• Enable **Drag and drop or copy and paste files** (Allow access to the clipboard).

Enabling UTF-8 Support for Internet Protocols

If users export extended characters from Infor CRM to e-mail, UTF-8 support must be enabled.

To enable

1. Open Microsoft Outlook.
2. On the **Tools** menu, click **Options**.
3. Click the **Mail Format** tab, and then click **International Options**.
4. Under **Internet Protocols**, select **Enable UTF-8 Support**.
5. Click **OK**.

Installing Office Integration

Office Integration extends Infor CRM Web Client functionality by downloading client-side files for the following features:

- Office Integration encompasses Mail Merge and Drag and Drop functionality. Administrators can also drag-and-drop library files.

- Office Integration is not supported if your installation of Microsoft Office is 64 bit.
- Available functionality may be restricted by the browser type or version. For full Office Integration support, use IE 10 or 11. For limitations of other browsers see the Compatibility Guide.

Before users install and configure these features, ensure you configured SData as detailed in "Configuring the SData Portal" on page 54.

To install and configure

1. Sign in to the **Infor CRM Web Client**, expand the **Tools** menu and then click **Options**.
2. Click the **General** tab, and then click **Install Office Integration**.
3. Follow the steps in the Wizard.

4. At the end of the installation, click **Finish**.

Creating the Contact Sync Group

If your implementation includes Standard Outlook Integration you must create an ad hoc group. Contacts in this group synchronize between Infor CRM and your mail application. You can give the group any convenient name. The name used in these instructions is Contact Sync.

To create

1. Open the Web Client Contact List view.
2. Select the contacts you want to synchronize with Microsoft Outlook.
3. Right-click the selected contacts, and then click **Save Records as Group**.
   The Add Records to new Group dialog box opens.
4. In the **Group Name** box, type *Contact Sync*.
5. Click **OK**.

.

After completing this chapter...

You have completed tasks 10-15 in the "Web Tasks" checklist. If your implementation includes:

- The Mobile Client: proceed with Chapter 9, "Configuring the Mobile Client".
- Customer Portal: proceed with Chapter 10, "Configuring Customer Portal".
- Remotes: proceed with Chapter 11, "Configuring Synchronization".
- Infor CRM Xbar for Microsoft Office, see "Installing Xbar for Microsoft Outlook" on page 121.

Otherwise, you can begin using Infor CRM.

Chapter 9
Configuring the Mobile Client

Before beginning this chapter...

Install and configure the Web Host and the SData portal as described in Chapter 5, “Installing the Web Components”. In addition, restart all servers involved in the implementation.

Use the instructions in this chapter to...

Configure the Infor CRM Mobile Client. These tasks are required for all Infor CRM installations that include the Mobile Client.

Understanding the Mobile Client

Infor CRM Mobile provides secure, reliable mobile access to Infor CRM information when using mobile devices with internet browsers that support HTML5 and CSS3.

For data security, make sure your Infor CRM Web Server has a valid Secured Sockets Layer (SSL) security certificate installed. You can use the Web Server where you deployed your SlxClient portal.

Deploying the Mobile Client Portal and the SData Portal

See “Deploying Infor CRM Client Portals” on page 50 for detailed steps to deploy the SLX Mobile and SData portals.

Defining the Default Document

Default documents can be a directory’s home page or an index page containing a site document directory listing. The default document for the Mobile Client portal landing page is index.aspx and should have been added to the documents list on the IIS Web site by the installation. If your URL <https://YourSlxWebServer/SlxMobile> is not defaulting to call the index-nocache.aspx, you may want to define it manually.

See “Defining the Default Document” on page 56 for detailed steps to define the default document.

Testing the Mobile Web Site

Use the same procedure to test the Web site as you did for the Web Client (as explained in “Testing the Web Site” on page 73); however, modify the URL as follows:

http://*localhost*/*SlxMobile*

If you deployed the Mobile Client portal to a different Web site in IIS, use the following format:

http://servername:port/SLXMobile

Before installing the Mobile Client portal, make sure your environment meets the following requirements:

- Infor CRM is installed and has a functioning Web environment.
- The Web Server has a valid Secured Sockets Layer (SSL) security certificate installed. You can use the Infor CRM Web Server where you deployed your Saleslogix Client portal.
- The SData portal has already been deployed successfully.

  To confirm that SData is set up correctly, type the following URL into your browser:

  http://<servername>/sdata/$system/adapters. Enter the user credentials of the Infor CRM user that SData is configured under (for example, Admin). The adapters page Infor CRM Mobile v1.2 Implementation Guide should load and list the available feeds.

Sending the Mobile Client Portal URL to Users

Send the Mobile Client 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 Infor CRM user can access Infor CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.

For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile.

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.

For more information, refer to the “Common Tasks in Application Architect” topic in the Application Architect help.

Using Infor CRM Mobile with Windows Authentication

When Windows Authentication is implemented, users will still see a log on screen when they open the Mobile Client.

Remember you must enable Windows Authentication on the SData portal.

To configure Windows Authentication for Mobile:

1. After installing, building and deploying the Infor CRM (SlxClient) Web Client and SData portals:
   a. Configure Windows Authentication for the Web Client:
      i. Configure the WebDLL user. See “Configuring the WebDLL User for Windows Authentication” on page 53.
      ii. Configure your Web Server for Windows Authentication. Be sure to complete the steps for the SData portal. See “Configuring the Web Server” on page 76.

      Alternatively, you can follow the instructions in the Administrator help. See the topic called ‘Configuring Windows Authentication for Windows Server.
   c. Deploy the Mobile and SData portals. See ““Deploying Infor CRM Client Portals” on page 50.
   d. In the Administrator, open the User Profile General tab for each Infor CRM user who will also be a Mobile Client user. This could be a Network, Web, Remote, or Concurrent user. Make sure that the Use Windows Authentication check box is selected. See the topic called “User Profile General Tab” in the Administrator help for more information.
   e. Ensure that the Infor CRM user is associated to a Windows Domain user.

2. Instruct users to use the fully-qualified domain name when they log on to Infor CRM Mobile.

   To authenticate with Windows Active Directory when logging into the Mobile portal, you must supply the fully-qualified domain name and windows password in the logon dialog. For example:

   user name: testcorp\lee.hogan

   password: <Lee Hogan's windows password on testcorp domain>

To mitigate the need to supply a fully-qualified domain name, change the IIS basic authentication settings for SData authentication to supply a default domain.

After completing this chapter...

You have completed steps 1 to 4 in the "Mobile Client Tasks" checklist. If your implementation includes:

- Customer Portal: proceed with Chapter 10, "Configuring Customer Portal".
- Remotes: proceed with Chapter 11, "Configuring Synchronization".

Otherwise, you can begin using Infor CRM.

Chapter 10
Configuring Customer Portal

Before completing this chapter...

Install and configure the Web Client as described in Chapter 8, “Configuring the Web Client”.

Use the instructions in this chapter to...

Configure and deploy Customer Portal. These tasks are required for installations that include Customer Portal.

Customer Service and Customer Portal extend Infor CRM customer service features onto the Web for employees and customers.

Understanding Customer Service

Customer Service features in the Infor CRM Web Client allow employees to add or update tickets, track their time as ticket activities for processing and resolving tickets, create calendar activities for tickets, add related ticket information, access SpeedSearch to find solutions to customers’ problems, and run reports. Customer Service is enabled for all named users by default.

Understanding Customer Portal

Customer Portal enables you to provide customers with user names and passwords so that they can view information about existing tickets, create new tickets, and change the status of tickets. Customers can also access SpeedSearch to find solutions. Customers are granted permissions to Customer Portal by an internal Infor CRM user.

Customer Portal features require:

- Infor CRM Advanced License
- Customer Portal License
- Additional configuration in Administrator and Application Architect.

Before you configure Customer Portal, ensure:

- The Web Host is installed and configured according to Chapter 5, “Installing the Web Components”.
- SpeedSearch Server is installed and configured on the same server as the Web Host or on a separate server.
- Employees who use Customer Service are active Infor CRM users (not WebViewer users).
- Users who access Customer Portal have the same hardware, browser, and configuration as users who access the Web Client.

Adding the Customer Portal User

Customer Portal requires a generic, named Infor CRM user. This user may be set up as a Named Web User or Concurrent User. In addition, the user **must** be a member of every team, and every user's team, so that customers can access records owned by all teams.

The admin user can be used for Customer Portal if you do not want to create a separate named user.

To add

1. On the Administrator Navigation Bar, click **Users**.
2. Click the **Add** button on the toolbar.
3. In the **Add Users** dialog box:
   a. In the **Add** box, select **Named Web** or **Concurrent User.**
   b. In the **Quantity** box, ensure **1** appears.
   c. Ensure the **Create Profile From** check box is cleared.
   d. Click **OK**.
   The User Profile for <NewUser> dialog box appears.
4. On the **General** tab:
   a. In the **Username** box, type **customerportal** (one word).
   b. In the **Name** box, type **Customer Portal**.
   c. Ensure the **Login Active** check box is selected.
   d. In the **Department** box, select a department for this user.
   This can be any department.
   e. Verify the **User Type** is **Named Web** or **Concurrent User**.
5. On the **Teams** tab:
   a. In the **Teams** area, click **Manage**.
   b. In the **Teams** dialog box, select each team. Ensure you have selected all teams.
   c. Click **OK**.
6. Click **OK**.
   The new Customer Portal user appears in the Users grid.

Setting User Security

Customer Portal requires a Web access user, which permits users who are not named Infor CRM users to access parts of Infor CRM functionality. The Web access user uses the permissions of the named Customer Portal user (customerportal) to perform certain actions, and records any history, logs, and so on to that user name.

To set

1. On the Application Architect **Tools** menu, click **Web User Security**.
2. In the **Select a Web Access User** list, select *Portal, Customer*.
   If you are using a different user name for the Customer Portal user, set the value to that name; however, make sure that user name has been configured as instructed in "Adding the Customer Portal User" on page 82.
3. Click **OK**.
4. On the **Build** menu, click **Build Web Platform**.

Deploying the Customer Portal

See "Deploying Infor CRM Client Portals" on page 50 for detailed steps to deploy Customer Portal.

Configuring the Customer Portal

Additional configuration for SpeedSearch indexes and Web access is required for Customer Portal.

Configuring SpeedSearch Indexes for Customer Access

To make SpeedSearch indexes available to customers so that they can search for information, ensure you have given Customer access to each index under the Public Access setting. If you have already assigned Customer access to indexes when you originally set them up, disregard this section.

To configure

1. On the Administrator **Manage** menu, click **SpeedSearch Indexes**.
2. In the **Manage SpeedSearch Indexes** dialog box, select an item under **Index Name** that you want to allow customers to access, and then click **Edit**.
3. In the **SpeedSearch Index Definition** dialog box, under **Public Access**, select **1- Customer**.

   Internal employees can still access this index when Public Access is selected.
4. Click **OK**.
5. If necessary, continue selecting indexes and editing the Public Access for each one.

Enabling the Contact Web Access Tab

By default, only the system administrator can grant contacts access to Customer Portal. However, you can give certain employees who use Customer Service this ability as well. When employees have this access, they can see the Web Access tab in the Contact Detail view within Network Client and Web Client.

To enable

1. Make a list of employees who should be able to grant contacts access to Customer Portal.
2. On the Administrator Navigation Bar, click **Users**.
3. In the **Users** grid, double-click the first user in your list to open the user's profile.
4. On the **Service/Support** tab, select **User may grant access to Customer Portal**.

   This enables the employee to use Infor CRM with Customer Service or the Web Client with Customer Service to open a contact record, click the Web Access tab, and set up a user name and password for the contact so the user can log on using Customer Portal.
5. Click **OK**.
6. Repeat steps 3-5 for each employee on your list.
7. Inform the employees that when they log on to the Network Client or the Web Client with Customer Service, and open a contact record, the Web Access tab appears so that they can set up a user name and password for the contact.

   Once this is set up, the contact can log on to Customer Portal to view tickets, create new tickets, close and re-open tickets, and access SpeedSearch. For more information, see the Customer Portal Help.

Testing the Customer Portal Web Site

Use the same procedure to test the Web site as you did for the Web Client (as explained in "Testing the Web Site" on page 73); however, modify the URL as follows:

http://localhost/SlxCustomerPortal

The localhost is the name of your Web Host server.

If you deployed the Customer Portal to a Web site you created during the Web Host installation, or to another Web site you created manually in IIS, the format is: *http://servername:portnumber/SlxCustomerPortal.*

The server is the name of your Web Host server. The port is the port number you specified during the Web Host installation.

Linking from Your Company's Web Site

After Customer Portal configuration is complete, you must create a link to it from your company's Web site.

Create the link in the following format:

http://*servername*/*SlxCustomerPortal*

For example:

```
<a href="http://servername/SlxCustomerPortal
"> Report a Problem/Check for a Response</a>
```

If you deployed the Customer Portal to a different Web site in IIS, create the link in the following format:

```
<A HREF="http://servername:portnumber/SlxCustomerPortal"
"> Report a Problem/Check for a Response</a>
```

The server is the name of your Web Host machine. The port is the name of the port the Web site is using. The Web site name is *SlxCustomerPortal*, unless you specified a different name when deploying Customer Portal.

Configuring Client Computers

To ensure the Customer Portal functions correctly, configure settings in each user's browser as described in the following table.

The option locations and wording may vary depending on your browser version. For more information on these options, refer to your browser's Help.

Internet Explorer Option	Setting
Temporary Internet Files>Settings	Check for newer versions of stored pages **Automatically**.
Privacy tab	**Medium** or lower (cookies must be enabled).

After completing this chapter...

You have completed steps 2 to 8 in the checklist. If your implementation includes Remotes, proceed with Part III: "Remote Offices, Users, and the Offline Web".

Part III
Remote Offices, Users, and the Offline Web

Chapter 11
Configuring Synchronization

Before beginning this chapter...

Add licenses and configure the system as described in Chapter 4, “Configuring the Infor CRM System”.

Give the SLXService user permissions for the Sync Service as described in “Permissions Required for the SLXService User (without Administrator rights)” on page 14.

Use the instructions in this chapter to...

Configure synchronization. These tasks are required for all Infor CRM installations that include remotes.

Synchronization Server refers to both the software that runs synchronization and the hardware on which the server is installed. A Sync Server is only necessary if you have Remote users (including Offline Web Client users) or Remote Offices, or you plan to run agents.

Use the *Infor CRM Planning Guide* to understand the synchronization process in detail and to make decisions regarding your synchronization requirements.

Creating Synchronization Transfer Profiles

Infor CRM supports three methods of synchronization. Each synchronization method is defined by one or more Sync Transfer Profiles. To create a Sync Transfer Profile, refer to one of the following:

- “Creating a Network Synchronization Profile” in the following section.
- “Creating an FTP Synchronization Profile” on page 88.
- “Creating an HTTP Synchronization Profile” on page 90.

Creating a Network Synchronization Profile

One way to synchronize with the main office is through a VPN (Virtual Private Network) connection. Using VPN, Remote users or offices connect to the Infor CRM network via the internet to send and receive transactions from the main office database.

This is the default method of synchronization. Unless you want to change the Sync Transfer Profile settings, Remotes can synchronize via network synchronization without additional configuration.

The next step...

Proceed to “Creating a Synchronization Service Profile” on page 93.

Creating an FTP Synchronization Profile

FTP support is built into both the Sync Server and Sync Client. When the Sync Server cycles, it connects to the FTP site and searches the FTP Infiles directory for any transaction exchange files that were sent by Remote users. Likewise, when the Sync Client cycles, it connects to the FTP site and searches the FTP Outfiles directory for transaction exchange files placed there by the main office. Essentially, all transaction exchange files, library files, and documents are delivered to and received from the FTP site.

Logging on to an FTP site can be accomplished in one of two ways:

- **Global login** - Using a global login, the Sync Server and all Remote users share the same login and password.
- **Personal logins** - Using personal logins, the Sync Server and each Remote user is assigned a different login to the FTP site.

Setting up an Infor CRM FTP Site

An FTP site is a collection of files on an FTP server. The FTP server allows users to upload or download files through the Internet or other TCP/IP network using a File Transfer Protocol (FTP). By default, IIS uses Passive FTP connections.

When setting up an FTP site, you must:

- Create three folders on the FTP server. For example, /Infiles, /Outfiles, and /FailedTrans. These folders must be shared, and all Remote users and the Sync Server must have read, write, and delete access.
- Create three virtual directories that point to the Infiles, /Outfiles, and /FailedTrans folders. All Remote users, as well as the Sync Server, must have read, write, and delete access to these directories.

- For FTP performance tips, see the “Improving FTP Synchronization Performance” topic in the Administrator Help.
- To configure FTP synchronization to use Active FTP connections, see the “Configuring FTP Sync to Run in Active or Passive Mode” topic in the Administrator Help.

If your implementation includes multiple Sync Servers, note the following:

- You can only have one /Infiles, /Outfiles, and /FailedTrans folder per Sync Server.
- You can have multiple FTP virtual folders per Sync Server. However, Infor CRM recommends approximately 50 Remote users per FTP virtual folder.
- Infor CRM recommends that your FTP Server is on the corresponding Sync Server (if possible).

Creating an FTP Sync Profile

The Sync Transfer Profile identifies the DLL file used for FTP synchronization.

To create

1. On the Administrator **Manage** menu, click **Sync Transfer Profiles**.
2. In the **Sync Transfer Profiles** dialog box, click **Add**.
3. In the **DLL** box, select **FTP Sync Transport v1.2 (SSftp.dll)**.
   If FTP Sync Transport is not available in the DLL list, verify the SSftp.dll file is located in the SalesLogix folder.
4. In the **Description** box, type a description of the synchronization method.
5. Click **Setup**.
6. In the **FTP Site** box, type the address of the primary FTP site to which the Sync Client connects (for example, ftp.yourcompany.com).
   You can use a named FTP site (for example, yourcompany.com), or an IP address (for example, ftp.123.45.67.8).
7. In the **Port** box, type the primary site’s port number on the FTP server.
   Port numbers allow IP packets to be sent to the FTP site.
8. In the **Alternate Site** box, type an alternate address that connects to your FTP site.
   If the Sync Client cannot connect using the primary address, it attempts to use the alternate address. For example, you can use the named FTP site as the primary site and the IP address as the alternate site.

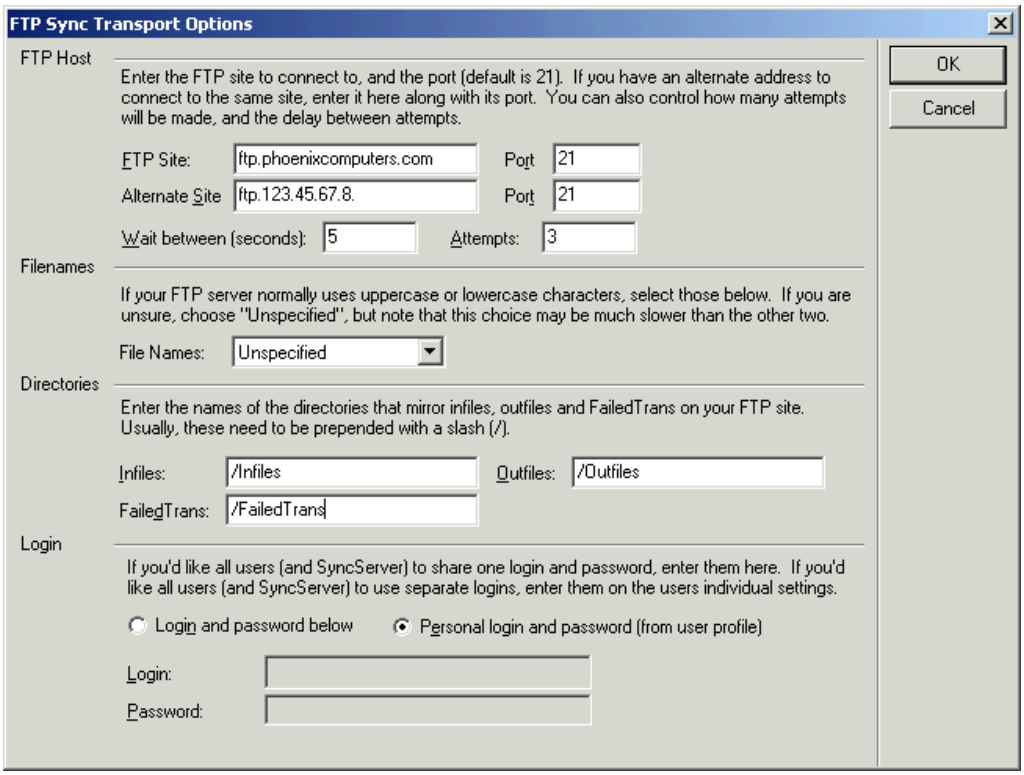
9. In the **Port** box, type the alternate site's port number on the FTP server.
10. In the **File Names** box, select **Uppercase**, **Lowercase**, or **Unspecified**.

    Response time improves considerably if this setting matches the way file names are stored on your FTP server. The default is Unspecified.
11. In the **Infiles**, **Outfiles**, and **FailedTrans** boxes, type the Infiles, Outfiles, and FailedTrans folder names on your FTP server (for example, /Infiles, /Outfiles, and /FailedTrans).

    Creating the folders is outlined in "Setting up an Infor CRM FTP Site" on page 88.
12. Under **Login**:
    - Click **Login and password below** to assign the same login and password to the Sync Server and all Remote users. Then in the **Login** box, type the general login that is shared by all Remote users and Sync Server(s) when logging on to the FTP site. In the **Password** box, type the corresponding password. Then, click **OK**.

      If you choose to use a global login, you can use the default anonymous user that comes with FTP. This user is already configured with the necessary permissions. This user has a Login of anonymous, and the corresponding Password is your domain name.
    - Click **Personal login and password** to assign a different login and password to each Sync Server and Remote user. Then, click **OK**.

      Use the FTP Sync Transport Local Options dialog box to set the login for the sync server. Personal logins for Remote users are set in the individual's user profile. The instructions for configuring the user login are in Chapter 12, "Configuring the Remote Client".



13. If you selected the **Personal login and password** option, in the **Edit Sync Transfer Profile** dialog box, click **Server Settings**. In the **Login** and **Password** boxes, type the Sync Server's login and corresponding password to the FTP site.
14. Click **OK**.
15. Proceed to "Creating a Synchronization Service Profile" on page 93.

Creating an HTTP Synchronization Profile

HTTP Synchronization provides a secure method of transferring data using a Web site on an HTTP Server. When the Sync Server cycles, it connects to the HTTP Server and searches the Infiles folder for any transaction exchange files (TEFs) that were uploaded by Remote users. Likewise, when the Sync Client cycles, it connects to the HTTP Server and searches the Outfiles folder for any transaction exchange files placed there by the main office. All transaction exchange files, library files, and documents are uploaded to and downloaded from the HTTP Server.

If you are creating an HTTP site on Windows 2008, IIS 6 compatibility is required. Ensure you enable IIS 6 compatibility on the HTTP Server. See "Web Requirements" on page 17 for details.

Setting up an Infor CRM HTTP Site

An HTTP site is a collection of files on an HTTP Server that allow users to upload or download files via the Internet. HTTP synchronization requires Internet Information Services (IIS) with World Wide Web Service installed.

When synchronizing using HTTP, you must set up IIS and configure the necessary folders for file transfer.

Before creating the HTTP Site, ensure you have IIS with HTTP Support installed and running.

To create an HTTP site on Windows 2008R2 or 2012

1. On the HTTP Server, create a folder where you want the Infor CRM Web site you create to point. For example, SLXHTTPSync.
2. In the folder you created in the step 1, create the following three sub folders. Set folder permissions to Read, Write, and Modify.
   - Infiles
   - Outfiles
   - FailedTrans
3. Open **Internet Information Services (IIS) Manager**.
   a. Create or use an existing Infor CRM application pool.
   b. Ensure the identity of the application pool is set to log on with a user that has Read, Write, and Modify permissions to the HTTP sync folders you created in step 2.
   c. For 64-bit operating systems, enable 32-bit applications.
4. In the **Connections** tree view, expand your HTTP Server, and then expand **Sites**.
5. Right-click the **Sites** folder, and then click **Add Web Site**.
   The Add Web Site dialog box opens.
   a. In the **Site name** box, type a name for the Web site. For example, Infor CRM HTTPSync.
   b. In the **Physical path** box, browse to the folder you created in Step 1. DO NOT point to the network logging path.
   c. Click **Connect as**, verify **Application user (pass-through authentication)** is selected, and click **OK**.
   d. Click **Test Settings** to verify the connection.
   e. In the **Type** box, ensure http is selected.
   f. In the **IP address** box, select **All Unassigned**.
   g. In the **Port** box, change the port number to port 1024 or higher. Record the port number you are using.
   If necessary, port 80 can be used.
   h. Leave the **Host name** box blank.
   i. Click **OK**.
6. In the **Connections** tree view, select your Infor CRM HTTP Web site.
7. In the Features View under **IIS**, double-click **Authentication**.
8. In the **Authentication** list, select **Anonymous Authentication**, and in the **Actions** pane click **Disable**.
9. Enable Windows Authentication.
   a. In the **Authentication** list, select **Windows Authentication**, and in the **Actions** pane click **Enable**.

b. In the **Actions** pane, click **Advanced Settings**.
   The Advanced Setting dialog box appears.
c. In the **Extended Protection** drop-down, select **Off** or **Accept** (either option works), and then click **OK**.
d. In the **Actions** pane, click the **Providers** link.
e. In the **Enabled Providers** list, select **NTLM** and move it to the top of the list.
f. Click **OK**.

10. In the Features View under **IIS**, double-click **MIME Types**.
    a. In the **Actions** pane, click **Add**.
    b. In the **File name extension** box, type **SLXT**.
    c. In the **MIME type** box, type **text/plain**.
    d. Click **OK**.
11. In the Features View under **IIS**, double-click **Directory Browsing**.
12. In the **Actions** pane, click **Enable**.
13. Enable and configure WebDAV (Web-based Distributed Authoring and Versioning).

Although WebDav has been determined to impact SData, you can enable it here without issues. It is automatically disabled in the SlxClient, SData and ProcessHost portals at deployment. This will not affect HTTP sync.

    a. In the Features View under **IIS**, double-click **WebDAV Authoring Rules**.
       If WebDAV Authoring Rules is unavailable, download the WebDAV Extensions for IIS from Microsoft.
    b. In the **Actions** pane, click **Enable WebDav**.
    c. In the **Actions** pane, click **Add Authoring Rule**.
    d. In the **Add Authoring Rule** dialog box, set the following options, and then click **OK**.
       - Under **Allow access to**, select **All Content**.
       - Under **Allow access to this content to**, select **All users**.
       - Under **Permissions**, select the **Read**, **Source**, and **Write** options.
14. Reset IIS.
    After setting up IIS, you must create a Sync Transfer Profile in the Administrator. .

WebDav has a default upload limit of 30 MB which can cause HTTP sync to fail to sync portals to Offline users. You can edit the HTTPSync web.config file as follows to increase this:

```
<security>
 <requestFiltering>
  <requestLimits maxAllowedContentLength=”2000000000” />
 </requestFiltering>
</security>
```

Creating an HTTP Sync Transfer Profile

The Sync Transfer Profile identifies the DLL file used for HTTP synchronization.

To create

1. On the Administrator **Manage** menu, click **Sync Transfer Profiles**.
2. In the **Sync Transfer Profiles** dialog box, click **Add**.
3. In the **DLL** box, select **HTTP Sync Transport v1.2 (SShttp.dll)**.
   If HTTP Sync Transport is not available in the DLL list, verify the SShttp.dll file is located in the SalesLogix folder.
4. In the **Description** box, type a description of the synchronization method.
5. Click **Setup**.

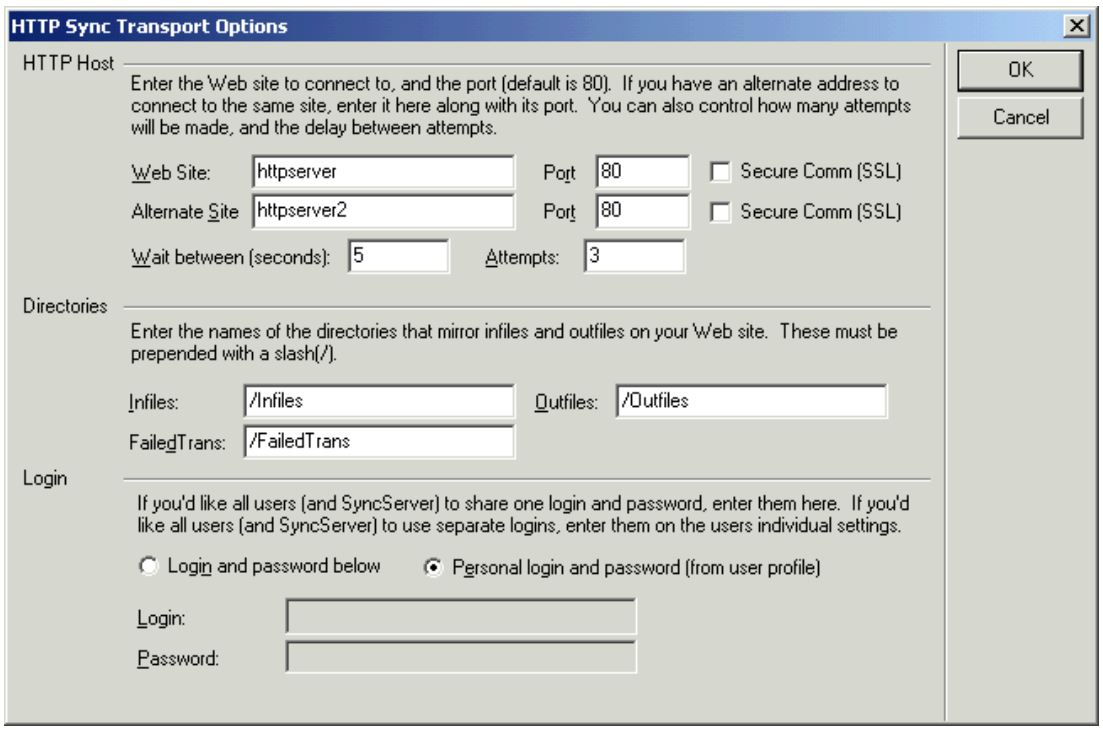
6. In the **Web Site** box, type the name of the HTTP Server to which the Sync Client connects for file transfer (for example, httpserver). This is the name of the server the Sync Client connects to, not the URL.

   Use the format: Servername or Servername.DomainName. Do not include http:// before the server name.
7. In the **Port** box, type the port number of your HTTP Server.
8. Select the **Secure Comm (SSL) check box** if you are using a secure connection to transfer files between the HTTP Host and Infor CRM.
9. In the **Alternate Site** box, type an alternate HTTP Server for file transfer.

   If the Sync Client cannot connect using the primary Web Site, it attempts to use the alternate site.
10. In the **Port** box, type the alternate site's port number on the HTTP Server.
11. If necessary, select the **Secure Comm (SSL) check box** if you are using a secure connection for your alternate site.
12. In the **Infiles**, **Outfiles**, and **FailedTrans** boxes, type the Infiles, Outfiles, and FailedTrans folder names on your HTTP server (for example, /Infiles, /Outfiles, and /FailedTrans).

    Creating the folders is outlined in "Setting up an Infor CRM HTTP Site" on page 90.
13. Under **Login**:
    - Click **Login and password below** to assign the same login and password to the Sync Server and all Remote users. Then in the **Login** box, type the general login that is shared by all Remote users and Sync Server(s) when logging on to the HTTP Server. In the **Password** box, type the corresponding password. Then, click **OK**.
    - Click **Personal login and password** to assign a different login and password to each Sync Server and Remote user. Then, click **OK**.

      Use the HTTP Sync Transport Local Options dialog box to set the login for the Sync Server. Personal logins for Remote users are set in the individual's user profile. The instructions for configuring the user login are in Chapter 12, "Configuring the Remote Client".



14. If you selected the **Personal login and password** option, in the **Edit Sync Transfer Profile** dialog box, click **Server Settings**. In the **Login** and **Password** boxes, type the Sync Server's login and corresponding password to the HTTP Server.
15. Click **OK**.

Creating a Synchronization Service Profile

Since synchronization can require a lot of system resources, it is recommended that you run synchronization during off-peak times, such as before or after normal business hours. To implement a synchronization schedule, you can use the Synchronization Service. Running the Sync Server from a Windows service allows synchronization to process without an administrator logged on to the server. In addition, the Monitor Console allows you to remotely view the status of the Sync Server and its scheduled jobs.

To create a Synchronization Service Profile, see the “Configuring Synchronization Server Automated Services” topic in the Administrator Help.

Starting the Synchronization Server

After installation and configuration, run a synchronization cycle to create the synchronization folders. This manual cycle also creates a registry entry that is used by Agent Runner to build a connection string.

You must log on to the Synchronization Service computer as a Domain user. You cannot log on using the Local System account to cycle the Sync Server the first time. The Local System account does not have the correct privileges for running Agents.

To start

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Server**.
2. In the **Please log on** dialog box:
   a. In the **Username** box, type **admin**.
   b. In the **Password** box, type the admin user’s password.
   c. In the **Log on to** box, ensure the correct database connection name displays.
   This is the connection name established in the Connection Manager.
3. Click **OK**.
4. If necessary, click **Yes** to register this computer to the database.
5. If the **Verify Administrator Password** dialog box appears, retype the administrator password, and then click **OK**.
6. Click **Sync Now** to cycle the Sync Server.
7. On the **File** menu, click **Exit** when the process is complete.

The first time you cycle the Sync Server, a sub folder is created in Documents and Settings\All Users\Application Data\Saleslogix\Sync. The folder name is server_name-alias_name. In addition, the Sync Server creates the ConfTran.stm file used for conflict resolution.

Modifying Virus-Checking Software for the Synchronization Server

If you have virus-checking software scanning the synchronization folders at the same time that the Sync Server tries to use a file within the folders, you may receive an “Error deleting file or folder” error. This occurs when the virus checking software checks the file at the same moment that the Sync Server tries to use that file.

To avoid errors, set your virus-checking software to modify scans to skip the following folders during real-time scans and/or scans scheduled to run at the same time the Sync Server is scheduled to run. If anti-virus programs are scanning the following folders in real time during a synchronization cycle, it may cause problems with synchronization to Remotes.

- WriteCache
- Infiles
- Outfiles
- FailedTrans
- WGLogs
- SharedLogs

- Archives

After completing this chapter...

You have completed the "Synchronization Tasks" checklist. If your implementation includes:

- Remote users: proceed with Chapter 12, "Configuring the Remote Client".
- Remote Offices: proceed with Chapter 13, "Configuring a Remote Office".
- Offline Web Client: proceed with Chapter 14, "Configuring Offline Web Clients".

Chapter 12
Configuring the Remote Client

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Delete the PortalDeployments.xml from the Application Architect as described in “Enabling the Windows Remote Clients Portal to Display” on page 48.

Use the instructions in this chapter to...

Install and configure Infor CRM Remote Clients. These tasks are required for installations that include Remote users.

Remote Clients use the Infor CRM Windows Network Client. They keep a subset of the main office database on their local computer (a laptop, for example) and use synchronization to transfer changes between their system and the main office. To synchronize data, the main office and each Remote client must have a set of synchronization folders on their computers and have the ability to transfer files. Remote users can also connect directly to the main office database using a LAN or WAN connection.

Planning for Remote Users

The computer used for creating remote databases must have SQL 2005 Native client installed.

Before adding Remote users, consider creating subscription rules to limit the number of account records stored on the Remote user’s database. Subscription gives Remote users access only to accounts that they use on a regular basis. This maintains the Remote user’s database at a manageable level and improves overall system performance. The use of subscription and subscription rules for Remote users is strongly recommended.

For more information, refer to the “What is Subscription?” and “Subscription Recommendations” topics in the Administrator Help.

Configuring Remote User Profiles

The Administrator is used to manage user profiles. In addition to the settings for Network users, Remote user profiles must contain synchronization and subscription information.

If you have not created your Remote users, refer to “Creating Users” on page 60. Then, configure the synchronization options as described in the following section.

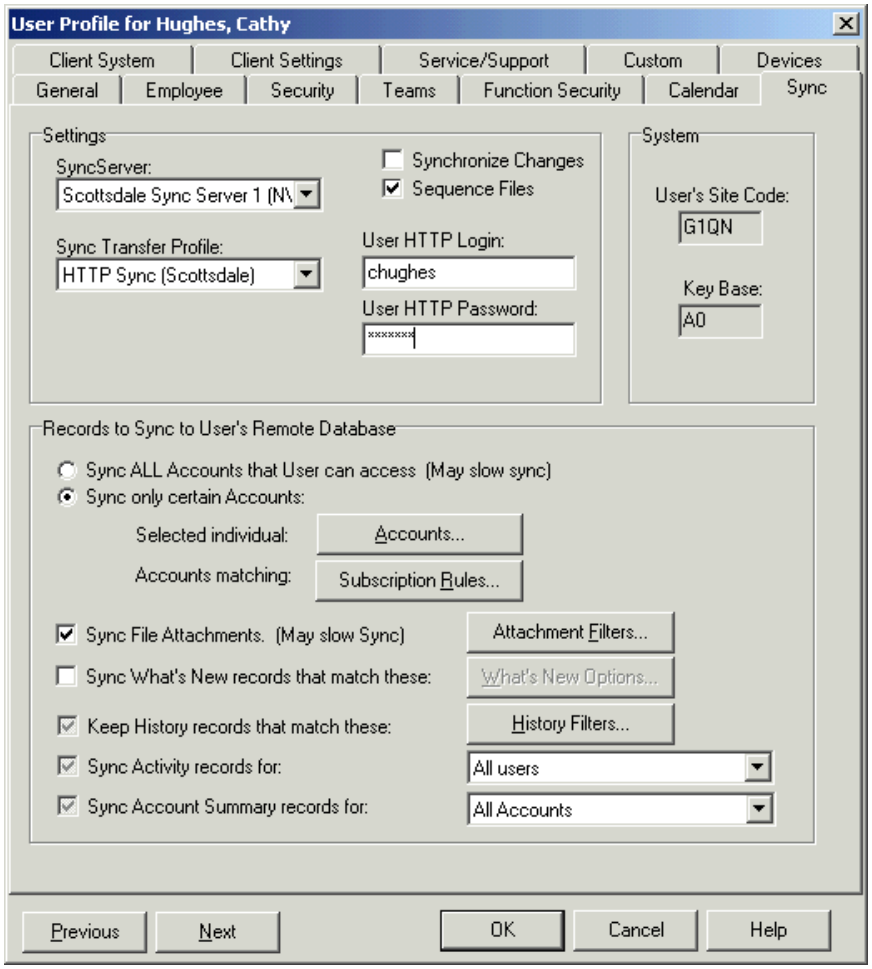
Setting Synchronization Options

Synchronization options assign the Remote user to a Sync Server, and determine how the user synchronizes with the main office.

You must create system Sync Transfer Profiles before setting the Remote user's Sync Transfer Options. If you have not created your system profiles, see "Creating Synchronization Transfer Profiles" on page 87 for instructions.

To set

1. On the Administrator Navigation Bar, click **Users**.
2. In the **Users** view, click the **Remote Users** tab, and then double-click a user name.
3. In the **User Profile** dialog box, click the **Sync** tab.



4. In the **SyncServer** box, select the Sync Server to which this user is assigned.

   If your implementation includes multiple Sync Servers, review the recommendations in the *Infor CRM Planning Guide* for assigning users to Sync Servers.
5. In the **Sync Transfer Profile** box, select the Remote user's method of synchronization.

   Your choices depend on the system sync transfer profiles configured in "Creating Synchronization Transfer Profiles" on page 87.

   If FTP or HTTP is your synchronization method, and you are using individual logins and passwords for each user and the Sync Server, type the user's login and password in the appropriate boxes.
6. To set subscription rules for the user, click **Subscription Rules**.
   a. In the **Subscription Rules** dialog box, select the rule(s) you want to apply to this user. Click **Copy**.

   b. Click **OK**.
7. To configure how attachments are sent to this Remote user, click **Attachment Filters**. In the **Attachment Filter Options** dialog box:
   a. To set a size limit, select **File Size Less Than**, and then type in a size limit.
      When this value is set, any attachments larger than the specified value will not automatically synchronize to the Remote. The Remote user can request the attachment, but it will not be sent when creating a Remote database or during the normal synchronization process.
   b. To set a date limit, select **Files Added Within Last**, and then type in a number of days.
      When this value is set, any attachments older than the specified value will not automatically synchronize to the Remote. The Remote user can request the attachment, but it will not be sent when creating a Remote database or during the normal synchronization process.
   c. To apply these options to all Remote users, click **All Users**.
   d. Click **OK**.
8. In the **User Profile** dialog box, click **OK**.

Creating a Remote User Database

Remote databases can be created using a Microsoft SQL Server Express instance.

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.

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.

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.

For more information, see the Knowledgebase article called *Understanding Collation and Remote Databases*.

To create

1. On the Administrator **Tools** menu, click **Create Remote User Databases**.
2. In the **Create Databases** dialog box, under **Available Users**, select the user(s) for whom the database(s) will be created, and click the arrow to move them to the **Selected Users** box.
   Configuring the default database settings is explained in "Setting Database Options" on page 41. To change the settings for this user only, click Options or Properties and configure the changes.
3. Each database is placed in the folder specified in the **Create Remote DB in server directory box** on the Database tab of the Options dialog box. To create the database(s), do one of the following.
   - To create the database(s) immediately, click **Now**.
   - To create the database(s) at a later time, click **Later**.
     - In the calendar, select a date and time, and then click **OK**.
       The Administrator is unavailable when the timer is active.
     - The **Create Databases** dialog box displays a countdown to the scheduled date and time.

   A test is performed to ensure the settings are configured and that the database can be created in the chosen location.

   The database is created with the file name *SLX_userid_dat*.sxd.
4. Click **OK** to confirm successful completion.

If the Remote user's 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's computer has access to it.

If the Remote user 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.

Deploying the SData Web Portal to Remote Clients

Infor CRM Remote Network Client users require an SData portal to enable support for such features as Outlook Sync and Xbar. Use the Application Architect to deploy this portal to the appropriate users.

Ensure you run a synchronization cycle on the Host before deploying the Web site (see "Starting the Synchronization Server" on page 93). The sync cycle creates the PortalDeployments folder required for the Web site deployment.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Windows Remote Clients**.
3. (Optional) In the **Deployment Settings** pane, in the **Name** box, type an intuitive deployment name.
   For example, Remote Windows Client Users.
4. In the **Description** box, type a description for this deployment.
   For example, "Provides SData portal for remote Windows Clients."
5. In the **Deployment Targets** pane, click **Remote Users**.
   The Remote User Target Settings appear.
6. In the **Remote User Target Settings** pane, click **Add**.
7. In the **Select Remote User(s)** dialog box, select the names of the users who need to access the SData portal.
8. On the **SlxClient** tab:
   a. In the **Virtual Directory** box, type the alias name for the virtual directory.
      By default, the Virtual Directory is SlxClient.
   b. In the **Port** 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.
   c. Ensure the **Deploy Portal** check box is selected.
      This indicates the portal is active and should be deployed.
9. Click **Save**.
10. Click **Deploy**.
    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.

Installing the Remote Client

Install the Remote Client on every Remote user's computer. The Remote Client cannot be installed on the same computer as the Administrative Workstation.

- If you created an automated installation using the instructions in "Installing the Network Client" on page 65, see "Performing an Automated Installation" in the following section.
- If you did not create an automated installation, see "Performing a Manual Installation".

Performing an Automated Installation

Installing the Infor CRM Client using an automated installation configures the Client computer with the settings selected when the installation was built.

When installing Infor CRM using an automated installation, third-party (prerequisite) applications are not installed. Third-party applications must be installed separately. Installations for these applications can be found in the Redist folder on the Infor CRM media.

To run

1. Distribute the entire folder structure created during the automated installation to the remote computer.
2. Instruct the Remote user to double-click **Saleslogix Remote Client.msi** in the root folder.
3. Install the Remote user database as detailed in “Installing the Remote User Database” on page 99.

Performing a Manual Installation

Run a manual installation if you do not want to install some components or if you want to change the installation location.

To run

1. On the **Installation** screen, click **Client Installations**.
2. On the **Installation** screen, click **Install Remote Client**.

   If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor CRM to install the required components or Cancel to stop the installation.

3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Click **Complete** to install the most common components.
   - Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
5. On the remaining screens, click **Install** and **Finish** to complete the installation.

After installation, you must install the Remote user database as outlined in the following section.

Installing the Remote User Database

Before logging on to the Remote Client, you must attach the Remote database using the Remote Database Setup dialog box.

The connection contains the following values:

- The Database Name is set to SLXRemote.
- The Server Name is set to the name of the Remote user’s computer.

  To change this value, right-click **My Computer** on your desktop, and click **Properties**. The computer name appears on the **Computer Name** tab.
- The **User** name is set to sa.
- The sysdba password is set to Ma$t3rk3y.

  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.

To install

1. Browse to the location of the Remote user database. The database file name is *SLX_userid_dat*.sxd.
2. Double-click the Remote database.
3. In the **Infor CRM Attach Remote** dialog box click **OK** to confirm a successful installation.

   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.

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.

Creating the Database Login

If you manually attach the SQL databases instead of using Attach Remote, you must enable the sysdba user or the CRM database will not be listed in the Connection Manager. This task is only necessary if attaching the database manually.

To configure the sysdba user

1. In the **SQL Server Management Studio** dialog box, on the **Tools** menu, click **SQL Server Query Analyzer**.
2. If you are not connected to the server, the Connect to SQL Server dialog box opens. In the **Connect to SQL Server** dialog box:
   a. In the **SQL Server** box, select your server.
   b. Type the system administrator (sa) password.
   c. Click **OK**.
3. On the **File** menu, click **Open**, and browse to **sysdbafix_script.sql**.
   This script is located in the Database folder on the DVD.
4. In the **Query** dialog box:
   a. In the **DB** box, select your new database.
   b. Click **Execute Query** (the green arrow) to start the script.
      The number of orphaned users fixed with this statement should be 1.
5. Exit the **Query** dialog box and the **SQL Server Management Studio**.

After running the sysdbafix_script.sql, refresh the SQL Server Management Studio to display the sysdba user in the database.

Starting the Remote Client

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.

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.

To start

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Infor CRM Client**.
2. In the **Please log on** dialog box:
   a. Type your **Username** and **Password**.
   b. In the **Log on to** box, ensure the correct database connection name displays (for example, SLXRemote).
   c. Click **OK**.
3. Open the SLMailClient.exe.
   By default, the Mail Client is installed in ...\Program Files\Saleslogix\SLMail.
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.

Creating a SpeedSearch Schedule

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.

To create

1. On the Infor CRM Client **Tools** menu, click **SpeedSearch Options**.
2. In the **Index** list, select the index(es) for which you want to set a schedule.
3. In the **Full Update** section, select the date and time you want the index(es) to complete a full update.
4. In the **Daily Update** section, select how you want to schedule daily incremental updates.
   - **When Infor CRM Opens** - All enabled indexes are updated when you open the Infor CRM Client.
   - **When Infor CRM Closes** - All enabled indexes are updated when you close the Infor CRM Client.
   - **Once at** - Select the time of day that you want to update all enabled indexes.
   - **Repeat Every** - Select or type how often you want all enabled indexes to be updated.
5. Click **OK**.

After completing this chapter...

You have completed the "Remote User Tasks" checklist. If your implementation includes:

- Remote Offices: proceed with Chapter 13, "Configuring a Remote Office"
- Offline Web Client: proceed with Chapter 14, "Configuring Offline Web Clients"
- Infor CRM Xbar for Microsoft Office, see "Installing Xbar for Microsoft Outlook" on page 121.

If your implementation does not include additional components, you can now begin using Infor CRM.

Configuring the Remote Client

Chapter 13
Configuring a Remote Office

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Delete the PortalDeployments.xml from the Application Architect as described in “Enabling the Windows Remote Clients Portal to Display” on page 48.

Use the instructions in this chapter to...

Install and configure a Remote Office. These tasks are required for installations that include a Remote Office(s).

A Remote Office consists of a group of users who access a Remote Office database. Unlike Remote users, these users do not individually synchronize with the main office. Instead, synchronization occurs when the Remote Office database synchronizes with the main office. A Remote Office may support any combination of Network and Web Client users.

The main office’s Administrator manages the Remote Office and Remote Office users.

Remember that SQL 2005 Native client is required on the computer that creates Remote databases.

Configuring the Remote Office Profile

Before configuring the Remote Office profile, you must have a Remote Office license(s) installed. One license is required for each Remote Office.

To configure

1. On the Administrator Navigation Bar, click **Systems**, click the **Offices** tab, and then double-click the **Remote Office** name.
2. On the **Sync Options** tab in the **Office Description** box, type the Remote Office name.
3. Under **Remote Office Options**:
   a. Use the **Synchronize Changes** check box to activate or deactivate synchronization for this remote office.
      Select this option only after you install and configure the Remote Office Sync Client, and the database is ready to accept synchronization files.
   b. Ensure the **Sequence Files Before Apply** check box is selected to check for missing, duplicate, or incorrect index numbers in Transaction Exchange Files (TEFs) before changes are made to the main office database.
      If this option is selected, the Archives folder stores a copy of all files sent to the main office. Once a confirmation is received from the main office that all files were successfully transferred, the archives are deleted.

c. Click **Transfer Options**. In the **Transfer Options** dialog box:
   - In the **Sync Transfer Profile** box, select the Remote Office's method of synchronization.
     Your choices depend on the system sync transfer profiles configured in "Creating Synchronization Transfer Profiles" on page 87.
   - Click **Custom Settings** to enter a login and password for the Remote Office.
   - Click **OK**.

4. Under **Shared Paths**:
   a. In the **Logging** box, type the location of the Remote Office logging folder using UNC conventions and the shared names.
      For example, \\MyServer\RemOffice Sync Logs, ***not*** \\MyServer\C:\RemOffice Sync Logs.

      
      It is not possible to use a logging path on a different (trusted) domain if the SLX Service is using the local system account. To use a logging path on a different domain, you must change the SLX Service from the local system account to a domain user with rights on both domains.

   b. In the **Library** box, type the location of the Remote Office Library folder using UNC conventions and the shared names.
      For example, \\MyServer\Library, ***not*** \C:\RemOffice Sync Logs\Library.
   c. In the **Attachments** box, type the location of the Remote Office Documents folder using UNC conventions and the shared names.
      For example, \\MyServer\Documents, ***not*** \\MyServer\C:\RemOffice Sync Logs\Documents.
      If you are connected to the network, browse to the Remote Office folders.
5. Click **OK**.

Adding Users to a Remote Office

After configuring the Remote Office profile, assign Network and/or Web Users to the Remote Office.

To add

1. If necessary, use Administrator to create users as described in "Creating Users" on page 60.
2. In the **User Profile** dialog box, click the **Sync** tab.
3. Under **General**, in the **Location** box, select the remote office to which you want to assign the Network users. The Web user option will not be available.
4. Click **OK**.
5. Repeat this procedure for all Remote Office Network users.

Creating a Remote Office Database

Create Remote Office databases using Administrator.


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.

When you install the Remote Client and use the Infor CRMmedia to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.

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.

For more information, see the Knowledgebase article called *Understanding Collation and Remote Databases*.

To create

1. On the Administrator **Tools** menu, click **Create Remote Office Databases**.
2. In the **Create Databases** dialog box, under **Available Remote Offices**, select the office(s) for which the database(s) will be created, and click the arrow to move them to the **Selected Remote Offices** box.

   The default database settings were configured in "Setting Database Options" on page 41. To change the settings for this office only, click Options and make the changes.
3. Each database is placed in the folder specified in the **Create Remote DB in server directory box** on the Tools > Options > Database tab. To create the database(s), do one of the following.
   - To create the database(s) immediately, click **Now**.
   - To create the database(s) at a later time, click **Later**.
     - In the calendar, select a date and time, and then click **OK**.
       The Administrator is unavailable when the timer is active.
     - The **Create Databases** dialog box displays a countdown to the scheduled date and time.

   A test is performed to ensure that the settings are configured and that the database can be created in the chosen location.

   The database is created with the file name *SLX_sitecode_dat*.sxd.
4. Click **OK** to confirm successful completion.

Transfer the database to the remote office database computer. 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 the remote office's computer has access to it.

If the Remote Office computer is not connected to the network, copy the database to the office's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote Office, and then copy it to the Remote Office's computer and unzip it.

Installing the Web Host

If the Remote Office will be using the Infor CRM Web Client, you must install the Web Host. Follow the instructions detailed in "Configuring the Web Host" on page 47.

Installing a Remote Office

The Remote Office is the computer that processes synchronization files and ensures that the main office and Remote Office database contain the same information. Because the synchronization process is resource intensive, do not install the Remote Office on the same computer as the Remote Office database. Rather, install the Remote Office on a dedicated computer with direct access to your network.

To install

1. On the **Infor CRM Installation** screen, click **Server Installation**.
2. On the **Server Installation** screen, click **Remote Office Server**.

   If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor CRM to install the required components or Cancel to stop the installation.
3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Select **Complete** to install all components on this computer.
   - Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:

- **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Infor CRM.

  If you do not select this option, set the information for the Infor CRM Service user you created as described in “Permissions Required for the SLXService User (without Administrator rights)” on page 14.
- **Domain** - Type the network domain where you created the Infor CRM Service user.
- **User Name** - Type the name of the Infor CRM Service user (for example, SLXService).
- **Password** and **Confirm** - Type the Infor CRM Service user’s password.
- Port **Change** button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.
- **Configure IIS for the Web Server -** Select this check box if your installation includes the Saleslogix Client and\or SData portals. This makes necessary modifications to IIS.

6. On the remaining screens, click **Install** and **Finish** to complete the installation.

Installing the Remote Office Database

Note the following when using SpeedSearch at your remote office:

- If the SpeedSearch Service is started before you install the Remote Office database, no SpeedSearch indexes are created.
- If the SpeedSearch Service is started after the Remote Office database is installed, but before the first Sync Client cycle, the SpeedSearch indexes are created but there are no documents in either the Library or Documents folder. A search will not find anything until the first schedule for those indexes is run.
- If you rename the database in the Attach Remote utility, you must complete additional steps to ensure the SpeedSearch indexes are created. See the “SpeedSearch Indexes Not Built For New Database” troubleshooting topic in the Administrator Help for more information.

To install

1. Browse to the location of the Remote Office database. The database file name is *SLX_sitecode_dat*.sxd.
2. Double-click the remote database.
3. In the **Remote Database Setup** dialog box, click **OK**.
4. In the **Infor CRM Attach Remote** dialog box click **OK**.

   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 Server instance to use dialog box.

After installing the Remote Office database, you are ready to start the Remote Office Synchronization Client.

Creating the Database Login

If you manually attach the SQL databases instead of using Attach Remote, you must enable the sysdba user or the Infor CRM database will not be listed in the Connection Manager. This task is only necessary if attaching the database manually.

To configure the sysdba user

1. In the **SQL Server Management Studio** dialog box, on the **Tools** menu, click **SQL Server Query Analyzer**.
2. If you are not connected to the server, the Connect to SQL Server dialog box opens. In the **Connect to SQL Server** dialog box:
   a. In the **SQL Server** box, select your server.
   b. Type the system administrator (sa) password.
   c. Click **OK**.
3. On the **File** menu, click **Open**, and browse to **sysdbafix_script.sql**.

   This script is located in the Database folder on the DVD.
4. In the **Query** dialog box:

a. In the **DB** box, select your new database.
b. Click **Execute Query** (the green arrow) to start the script.
   The number of orphaned users fixed with this statement should be 1.

5. Exit the **Query** dialog box and the **SQL Server Management Studio**.

After running the sysdbafix_script.sql, refresh the SQL Server Management Studio to display the sysdba user in the database.

Deploying Web Portals for the Remote Office

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).

For the Web Client user, the required portals are:

- SlxClient
- SData
- SlxJob Service

For the Windows Network Client, the required portal is:

- SData

If your Remote Office supports both Web Client users and Windows Network Client users, your Network Client users can use the SData portal deployed for your Web Client users.

Ensure you run a synchronization cycle on the Host before deploying the Web site (see “Starting the Synchronization Server” on page 93). The sync cycle creates the PortalDeployments folder required for the Web site deployment.

To deploy portals for the Web Client user

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Remote Sales Client**.
3. In the **Name** box, type a name for the deployment.
4. In the **Description** box, type a description for this deployment.
   For example, “Portals to support the Web Client at the Remote Office.
5. In the **Deployment Targets** tree view, click **Remote Office(s)**.
   The Remote Office Target Settings appear.
   a. In the **Server** 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.
   b. Ensure the **Deploy Target** check box is selected.
      This indicates the target is active and should be deployed.
   c. In the **Port** box, type the port number for your Web Host server. It must match the port for the Web site.
   d. In the **App Pool** box, type the name of the application pool for your Web site.
      For example, if you used the *Saleslogix* Web site, the App Pool is *Saleslogix*.
6. In the **Company Name** list, select the Remote Office(s) to which you want to deploy the Web Client.
7. Select the tab for each portal you want to deploy (SlxClient, SData, and\or SlxJobService):
   a. In the **Virtual Directory** box, type the alias name for the virtual directory.
   b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target’s base directory.

c. Ensure the **Deploy Portal** check box is selected.
This indicates the portal is active and should be deployed.

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.

8. Click **Save**.
9. Do one of the following:
   - Click **Deploy** to deploy portals individually.
   - Click **Deploy All** to deploy all portals in the Remote Office.

   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.

To deploy the SData portal for the Windows Client user

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Windows Remote Clients**.
3. In the **Name** box, type a name for the deployment.
4. In the **Description** box, type a description for this deployment.
   For example, “SData Portal at the Remote Office.”
5. In the **Deployment Targets** tree view, click **Remote Office(s)**.
   The Remote Office Target Settings appear.
   a. In the **Server** 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.
   b. Ensure the **Deploy Target** check box is selected.
      This indicates the target is active and should be deployed.
   c. In the **Port** box, type the port number for your Web Host server. It must match the port for the Web site.
   d. In the **App Pool** box, type the name of the application pool for your Web site.
      For example, if you used the *Saleslogix* Web site, the App Pool is *Saleslogix*.
6. In the **Company Name** list, select the Remote Office(s) to which you want to deploy the Web Client.
7. Select the tab for each portal you want to deploy (SlxClient, SData, and\or SlxJobService):
   a. In the **Virtual Directory** box, type the alias name for the virtual directory.
   b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target’s base directory.
   c. Ensure the **Deploy Portal** check box is selected.
      This indicates the portal is active and should be deployed.

      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.

8. Click **Save**.
9. Click **Deploy All** to deploy all portals in the Remote Office.

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.

Starting the Remote Office Synchronization Client

The first time the Remote Office Synchronization Client runs, the synchronization folders are created under the root RemOffice Sync Logs folder. This process only occurs if you configured the shared paths to the Remote Office (“Configuring the Remote Office Profile” on page 103) and shared the RemOffice Sync Logs folder.

The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.

The following files are created under the main RemOffice Sync Logs folder.

- Archives
- Infiles
- WGLogs
- What’s New.tlg

To start

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Client**.
2. In the **Log on to** dialog box:
   a. In the **Database** box, select the Remote Office database to which you want to log on.
   b. Click **OK**.
   The Remote Office Sync Client assumes you are logging on as the system administrator.
3. In the **Synchronization Client** dialog box, click **Execute**.
   The Remote Office Server creates the synchronization folders under the main RemOffice Sync Logs folder.
4. Click **Close** when the “Sync Process Completed” message appears.

Remember to select the Synchronize Changes option on the Administrator > Systems > Offices > Remote Office > Sync Options tab to activate synchronization for this remote office.

You can choose to run the Remote Office Synchronization Client as a service. For more information, see the Infor CRM Client Help topic called “Running the Remote Office Synchronization Client as a Service”.

Installing Remote Office Network Clients

To install Network Clients in the Remote Office, refer to “Installing Network Clients” on page 65.

Configuring Remote Office Web Clients

After installing and configuring the Web Remote Office, you must provide access to the Remote Office for Web Client users. Use the following URL format:

http://servername:port/<virtual directory name>. For example, http://servername:8086/SlxClient.

Configuring a Remote Office

.

After completing this chapter...

You have completed the "Remote Office Tasks" checklist. If your implementation includes:

- Offline Web Clients, proceed with Chapter 14, "Configuring Offline Web Clients".
- Infor CRM Xbar for Microsoft Office, see "Installing Xbar for Microsoft Outlook" on page 121.

If not, you can begin using Infor CRM.

Chapter 14
Configuring Offline Web Clients

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Use the instructions in this chapter to...

Install and configure Offline Web Clients. These tasks are required for installations that include Offline Web Client users.

Offline Web Client users are remote users that connect to their local database using the Web Client. Synchronization is used to transfer changes between the Offline Web Client user’s database and the main office database.

- Offline Web Client users cannot request attachments.
- Offline Web Clients cannot set a SpeedSearch schedule.

Configuring the Offline Web Client User

Offline Web Client users must be created as Remote users in the Administrator. Remote user profiles must contain synchronization and subscription information.

To create Remote users that will access Infor CRM using the Web Client, refer to the following sections:

- “Planning for Remote Users” on page 95 - to determine subscription rules.
- “Creating Users” on page 60 - to add Remote users. Offline Web Clients users are added in the Administrator as Remote users.
- “Setting Synchronization Options” on page 96 - to configure how the Offline Web Client user synchronizes with the main office.
- “Configuring Roles” on page 72 - to configure Web Client access for Offline Web Client users.
- “Creating a Remote User Database” on page 97 - to create the remote database.

After adding Remote users, setting synchronization options, and creating remote databases, install the Offline Web Client.

Web Client and Customer Portal help files are hosted by Infor at an external location and are available to users over the internet. To enable Offline Web Client users to access help while they are not connected to the internet, you must install the help files in a local location. For instructions on how to perform this task, see the Application Architect help file topic called *Upgrading Customized Help*.

Deploying Web Portals for the Offline Web Client Users

The Web Portals are:

- SlxClient
- SData
- SlxJob Service

Use the Application Architect to deploy the Infor CRM Web portals.

Ensure you run a synchronization cycle on the Host before deploying the Web site (see "Starting the Synchronization Server" on page 93). The sync cycle creates the PortalDeployments folder required for the Web site deployment.

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.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Remote Sales Client**.
3. (Optional) In the **Name** box, type a deployment name. For example, Offline Web Clients.
4. In the **Description** box, type a description for this deployment.
5. In the **Deployment Targets** pane, click **Remote Users**.
   The Remote User Target Settings appear.
6. In the **Remote User Target Settings** pane, click **Add**.
7. In the **Select Remote User(s)** dialog box, select the remote users who will receive the Offline Web Client deployment.
8. On the **SlxClient** tab:
   a. In the **Virtual Directory** box, type the alias name for the virtual directory.
      By default, the Virtual Directory is SlxClient.
   b. In the **Port** 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.
   c. Ensure the **Deploy Portal** check box is selected.
      This indicates the portal is active and should be deployed.
9. Click **Save**.
10. Click **Deploy**.
    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.

Running a Synchronization Cycle

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.

Understanding the Offline Web Client Installation

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:

- Microsoft SQL Express 2012

  If Microsoft SQL Express 2012 is not detected, Infor CRM will install it. If a previous version of Microsoft SQL Express with an Infor CRM instance is detected during the Infor CRM installation, the Infor CRM instance will be upgraded and 2012 will be installed in addition to the earlier version.

- .Net Framework 4.5.1 installed in Integrated mode
- Microsoft SQL 2005 Backwards Compatibility
- .Net AJAX Extensions
- Internet access to Microsoft.com

You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Infor CRM installation.

Installing Without Administrator Rights

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.

Installing With Administrator Rights

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:

- Add each user to the local machine's Admin group for the duration of the implementation.
- Use a domain user account that is a member of the domain admin group for the duration of the implementation.

Installing the Offline Web Client

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.

To install

1. On the **Infor CRM Installation** screen, click **Client Installations**.
2. On the **Client Installation** screen, click **Install Offline Web Client**.
3. On the **Welcome** screens, read the information and then click **Next**.
4. On the remaining screens, click **Install** and **Finish** to complete the installation.

Installing the Remote User Database

Install the Offline Web Client database using the steps outlined in "Installing the Remote User Database" on page 99.

Running a Synchronization Cycle

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.

To run

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Client**.

2. Log on using your Infor CRM user name and password.
3. Click **Sync Now**.

Logging on to the Web Client

After running a synchronization cycle to set up the portal, you can log on to the Web Client using the system tray icon.

To log on

1. Right-click the system tray icon, and then click **Open Site**.
2. Log on using the standard Web Client log on screen.

Installing Office Integration

Offline Web Client users must download and configure the Office Integration Module to use Mail Merge and Drag and Drop functionality. See “Installing Office Integration” on page 74 for details.

.

After completing this chapter...
You have completed the “Remote User Tasks” checklist.
If your implementation includes Infor CRM Xbar for Microsoft Office, see “Installing Xbar for Microsoft Outlook” on page 121.
If not, you can begin using Infor CRM.

Part IV
Appendices

Appendix A
Creating a Database for Oracle

Before beginning this chapter...

Verify you have installed the prerequisites and created and shared the logging folders as described in Chapter 2, “Preparing Your Environment”.

Having an experienced Oracle database administrator (DBA) to properly administer, tune, and maintain the CRM database, especially in a UNIX environment is strongly recommended. The *Infor CRM Planning Guide* provides a discussion of the Oracle database platform and implementation considerations.

The instructions in this chapter are provided as an example of creating an Oracle database for Infor CRM. This information can be safely used in a demonstration environment. For production systems, your Oracle DBA may use the information in the Infor CRM scripts as an example, but the database should be created by your DBA specifically for your environment.

To create a database for Oracle, you must do the following:

1. Create an Oracle database instance
2. Create a Net Service Name
3. Configure the Oracle database
4. Import the database structure
5. Index the database
6. Add database views

Creating an Oracle Database Instance

Refer to your Oracle documentation to create a database on UNIX. In a demonstration environment, you can accept the Oracle defaults for the Infor CRM database.

Ensure the Infor CRM database is placed in its own instance.

Creating a Net Service Name

After creating the database instance, you must create a Net Service Name (also called database alias).

Refer to the Oracle documentation for instructions to create a database alias.

Configuring the Oracle Database

After creating the database instance and Net Service Name, you must configure the database for Infor CRM. This process is automated using scripts provided by Infor CRM. Depending on your Oracle version, use SQL *Plus Worksheet or SQL Developer to perform the following tasks:

- Create permanent, temporary, and index tablespace and data files.
- Create an Oracle database login.

You must run the scripts used to complete these tasks in a specific order. If you do not run the scripts in the order outlined in the following sections, they do not work.

When running the scripts, you must log on with the Oracle sysdba option. Log on as “sys” with the Connect as option set to sysdba.

Due to legacy requirements of an earlier database platform, the name of the Infor CRM schema owner is sysdba.

Creating Tablespaces and Data Files

A tablespace logically organizes data in an Oracle database, while physically storing the data in one or more associated data files. To use Oracle with Infor CRM, you must create the permanent (SLX_DATA), temporary (SLX_TEMP), and index (SLX_INDEX) data files.

The CreateOracleSpace.sql script must be run as the sys user using the sysdba role.

To create

1. Open the **CreateOracleSpace.sql** script.
   The script is located in the Database\Oracle folder on the Infor CRM Media.
2. Modify the Tempfile and Datafile paths as appropriate for your environment.
   If necessary, you can also modify the script to ensure that tablespace and data files are sized correctly.
3. Log on to SQL *Plus Worksheet or SQL Developer.
4. In the **Login Information** dialog box:
   a. In the **Username** box, type **sys**.
   b. In the **Password** box, type the corresponding system password.
   c. In the **Service** box, type the name of the database instance.
   d. Verify that **Connect As** is set to **sysdba**.
   e. Click **OK**.
5. On the **File** menu, click **Open**.
6. Browse to the **CreateOracleSpace.sql** script.
7. To load the script into the Query section, click **Open**.
8. To run the script, click **Execute**.
9. Run the script as described in the following section to create the database login.

Creating the Database Login

To connect to an Oracle database, a user must have a login name in the database and privileges to perform specific database operations. Since Infor CRM uses sysdba to log on to the Oracle database, you must create a new login for the sysdba user and grant the appropriate privileges.

The CreateOracleUser.sql script must be run as the sys user using the sysdba role.

To create

1. Open Oracle SQL *Plus Worksheet or SQL Developer.
2. On the **File** menu, click **Open**.
3. Browse to the **CreateOracleUser.sql** script.
   The script is located in the Database\Oracle folder on the Infor CRM Media.
4. To load the script into the Query section, click **Open**.
5. To run the script, click **Execute**.

After creating the database login, you must import the database structure. Do not change the sysdba password before importing the database structure. If you change the password prior to importing the database structure, the import fails.

Importing the Database Structure

Infor CRM uses a DMP file to import the database structure into the Oracle database. The DMP file copies the default views, pick lists, reports, plugins, and other system information to the Oracle database. The DMP files are located in the Database\Oracle folder on the Infor CRM Media.

The SLX_Blank.dmp file creates the blank Infor CRM database. To create an evaluation database, run the SLX_Eval.dmp file.

Before importing the database structure, do the following:

- If running Oracle on UNIX, FTP the DMP file(s) to the Oracle Server.
- If running Oracle on Windows, copy the DMP file(s) to the Oracle Server.

To import

1. On the Oracle Server, open a command window.
2. Type imp USERID='sys/sys_password@database_instance_name AS SYSDBA' fromuser=sysdba touser=sysdba grants=n statistics=none ignore=y file=absolute path to the location of the .dmp file\SLX_Blank.dmp.
   For example, if the database instance name is SLX, and it is located in the C:\Oracle\Databases folder, the command line would be

```
imp USERID='sys/sys_password@SLX AS SYSDBA' fromuser=sysdba touser=sysdba grants=n
statistics=none ignore=y:

     FILE=C:\Oracle\Databases\SLX_Blank.dmp
```

The next step...

If you are completing task 5 of the "Required Tasks" checklist, refer to Chapter 3, "Installing Infor CRM" to install Infor CRM.

Creating a Database for Oracle

Appendix B
Installing Xbar for Microsoft Outlook

If your implementation includes Xbar for Microsoft Outlook, notify the Infor CRM users to install it and to configure Outlook Integration.

Infor CRM Xbar for Microsoft Outlook is an add-in to Infor CRM that embeds the functionality of CRM into Microsoft® Outlook®. Infor CRM Xbar for Microsoft Outlook enables users to access their most important CRM information and functionality through a window that is “docked” within the Outlook interface.

Users can access a wide range of information and activities, including interaction history, follow-up action items, leads generated from e-marketing campaigns, and opportunity management. Users work with and modify the CRM information, taking actions and updating the information as necessary, all from within Outlook and without losing sight of the Microsoft Outlook inbox.

Installation order

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:

- 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.
- Ensure that users have Power User rights or greater for their computers.
- Copy the Infor CRM Xbar Setup.exe set up files to the location where it can be accessed by your users. See “Copying the setup files” on page 121 for more information.
- Provide users with instructions for installing Xbar for Microsoft Outlook, and with their connection credentials. See “Providing connection credentials” on page 122 for more information.

Copying the setup files

The Infor CRM Xbar Setup.exe is provided on the Infor CRM media. To make the install available, do the following:

- Infor CRM Web Client users install Infor CRM Xbar from the Web Client Tools, Options, General tab, where there is an **Install Xbar for Outlook** button. To enable this button to function correctly you must copy the Infor CRM Xbar Setup.exe to C:\inetpub\wwwroot\SlxClient\Libraries\DesktopIntegration. .

  You must re-copy the Infor CRM Xbar Setup.exe to C:\inetpub\wwwroot\SlxClient\Libraries\DesktopIntegration after each re-deployment of the Web Client portal.

- 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 users.

Communicating installation instructions

Provide your Infor CRM Web Client users with the following installation instructions:

Infor CRM Web Client users

1. Sign in to the **Infor CRM Web Client**, expand the **Tools** menu and then click **Options**.
2. Click the **General** tab, and then click **Install Xbar for Outlook**.
3. Follow the installation instructions on screen.

Infor CRM Windows Client user:

1. Browse to the location provided by your Infor CRM Administrator and copy the **Infor CRM Xbar Setup.exe** to any convenient folder.
   Ensure you have Write permissions to the folder where you are saving the file. You can check permissions on the Security tab on the folder properties. Ensure the folder path is as short as possible, as there is a 57 character limit.
2. Click **Infor CRM Xbar Setup.exe** , and then click **Install**.

Providing connection credentials

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:

- **User Name:** Type your username. This is the username you use to log on to the CRM Clients.
- **Password:** Type your password. This is the password you use to log on to the CRM Clients.
- **Service URL:** This is the URL for your SData portal. For example: http://web.address.com/Sdata.
- **Client URL:** This is the URL for your Windows or Web Client. For example, http://web.address.com/SLXClient.

This field is a connection to the Web Client. It is not required but if it is left blank, you will be unable to launch the Web Client from the icon within Xbar. If this field is left blank and the Windows Client is installed on your machine, clicking the icon within Xbar will open the Windows Client.

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.

Appendix C
Customizing Client Installations

You can create customized installations of the Infor CRM Client and make them available to Network and Remote users to install. The user then installs Infor CRM using the custom configuration file. This feature is only supported for the Network and Remote Client installations.

Installing Infor CRM using the customized installation Infor CRM does not install third-party (prerequisite) applications. Third-party applications must be installed separately. Installations for these applications can be found in the Redist folder on the Infor CRM media.

To create a customized Client installation

1. Open a command prompt.
2. Type the following:

   “<Path to the network client setup.exe>” /a /vTARGETDIR=<path to where you want the network generated installs>
3. In the **User Account Control** box, click **Yes**.

   The Infor CRM Install Wizard screen for the component you are installing appears.
4. Click **Next**.
5. In the **Administrative Install Options** window, click **Modify default feature set**.
6. In the **Select Install Features** dialog, select the features you want to install.

   Features with a cleared check box next to the name will not be included in the install.
7. Click **OK** and then click **Next**.
8. In the **Network Location** box, accept the default location or click the **Change** button to select a different location.

   The location should be one available to anyone who will be installing, as the install you are creating will be saved to the location you specify.
9. Direct your users to the location you specified in step **8**.
10. Repeat steps **2** through **9** for each of the client installations you want to create (Network and Remote).

Customizing Client Installations

Appendix D
Silent Installations

Silent installs allow you to install Infor CRM components without any visible interface interaction, using command line prompts.

Commands and Options

The following table shows the basic MSIEXEC commands and options to use to install the Infor CRM components from the command prompt.

For a complete list of MSI options, run the following at the command prompt:

> msiexec /?

Feature Name	Command Line Script
OLEDB Provider	> msiexec /i "Saleslogix OLE DB Provider.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /qb+
Administrative Tools and Servers	> msiexec /i "Saleslogix Admin Tools and Servers.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" SLXDBSERVER=<YOUR_SERVER_NAME> /L*v <PATH><LOG FILE> /qb+
Web Host	> msiexec /i "Saleslogix Web Host.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" SLXDBSERVER=<YOUR_SERVER_NAME> /L*v <PATH><LOG FILE> /qb+
Remote Office Server	> msiexec /i "Saleslogix Remote Office.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Network Client	> msiexec /i "Saleslogix Network Client.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Network Remote Client	> msiexec /i "Saleslogix Remote Client.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Offline Client	> SlxOfflineClientSetup.exe /s /v"/qn /L*v <PATH><LOG FILE>"
Custom - Outlook Integration	SlxDesktopIntegrationSetup.exe /s /v"/qn INSTALLDIR=\"C:\SLXDESKTOP\" ADDLOCAL=OutlookIntegration

Setting Properties on the Command Line

Power users can set certain properties on the command line.

For the installs that setup a database connection

CONFIGSLXDB="YES" ("YES" is the default. Flag to determine whether or not we update the Infor CRM database.)
SLXDBUSER
SLXDBPSWD
SLXDBSERVER
SLXDBSERVERALIAS
SLXDBSERVERPORT

For the installs that can create a web site (for Web Host installs)

CREATEWEBSITE= "Yes" ("Yes" is the default. Flag to create a website.)
WEBSITENAME
WEBSITEDOMAIN
WEBSITEPORT
WEBSITEUSERNAME
WEBSITEUSERPSWD

Appendix E
Advanced Web Host Configuration

To maximize performance, you may need to scale your Web implementation. The Web components can be scaled at any time after your initial implementation. This appendix explains how to scale the implementation and includes instructions for completing a manual configuration.

Scaling the Web Implementation

If many users access the client(s) simultaneously, you may need to add secondary Web Hosts to improve performance. Secondary Web Hosts are separate Web servers.

In addition to the number of concurrent users, other factors, including database size, Server hardware, and Web Host hardware, influence performance. The need for additional Web Hosts must be individually evaluated for each implementation.

To install a secondary Web Host

1. Follow the instructions in “The WebDLL User” on page 15.
2. Install the Web Host as detailed in “Configuring the Web Host” on page 47.
3. Using the Application Architect, deploy the portals to the secondary Web Host.
4. In each user’s browser, make the Web site a Trusted site with the Default Level of security (Low).

Monitoring Active Thread Count

The recommended default thread setting is 32, and in most cases, it should not be necessary to modify this setting.

- Lowering the default thread setting is not recommended unless server responses are slow because of processing demands.
- Raising the default thread setting is not recommended, except in rare cases. For example, it may be helpful to raise the default thread setting if you are experiencing random 500 errors from IIS. It may also be helpful to raise the default thread setting in situations where many long-running, low-intensity actions are being performed by a user.

  For best performance, create another Web site (virtual server) on the same machine or on a different machine rather than raising the default thread setting.

To monitor active thread count (ISAPI connections) on your Web Host after you complete the implementation, use the Infor CRM counters in Microsoft System Monitor.

For more information, refer to “Monitoring Web Host Performance” on page 130.

Manually Configuring Web Hosts

If you prefer to manually create a Web site follow the instructions in this section.

Addressing Prerequisites

Address the following system prerequisites before continuing with your Infor CRM installation.

You do not need to apply these manual settings if you created your web site using the Infor CRM Web Host install.

- **IIS 7** - Use IIS Manager to enable 32-bit applications in the Saleslogix Application pool.
  - In IIS Manager, open the Infor CRM Application Pool Basic Settings. In the .NET Framework version box, select .NET Framework version 4.0.30319.
  - In the Managed pipeline mode box, select Integrated.
  - Open the Application Pool Advanced Settings. Set “Enable 32-Bit Applications” to True.

Creating the Web Site(s)

To enable users to access the Web Client, create a Web site in IIS for each Web Host and virtual server.

To create

1. Use the IIS wizard to create each Web site with the following settings:
   a. **TCP port** - Any available port greater than 1024.
      Port numbers 1024 and less are reserved by Microsoft.
   b. **Path to your home directory** - For example, C:\inetpub\wwwroot.
   c. **Pass-through Authentication**:
      - Click **Connect As**, and then click **Specific User**. Enter the credentials for your WebDLL user. For example, domain\WebDLL.

   All other default settings in the wizard are acceptable.
2. Right-click the name of each site, and then click **Properties**. Set the following options:

Tab	Step(s)	Notes
Web Site	In the **Features View** pane > **HTTP Response Header** > under **Set Common Headers**. Select the **Enable HTTP Keep-Alives** check box.	May improve performance slightly.
Directory Security	In the **Features** view, under **Authentication**, click **Edit**. Select the **Enable anonymous access** check box, and set anonymous access to the WebDLL user.	The anonymous user is the user name IIS uses to verify that the Web server has the appropriate security to access all necessary directories. Ensure you select the WebDLL user from your company’s domain and enter the correct password for the user.

Configuring Application Pool Permissions

You must configure the Application Pool for your Infor CRM Web site to ensure you have sufficient permissions to start the OLE DB Provider. The Web site is named Saleslogix, unless you changed it during Web Host installation.

See “Configuring Application Pool Permissions” on page 56 for detailed configuration steps.

Using Application Pools (Optional)

An application pool is a configuration that links one or more applications to a set of one or more work processes. Because each application in an application pool is separate from other applications by work process boundaries, an application in one application pool is not affected by problems caused by applications in other application pools. This means that each pool can be restarted without affecting other applications.

By default, an application pool named Saleslogix is created when you install the Infor CRM Web Host. Moving Infor CRM to an application pool is optional; it is not required to run Infor CRM Web components.

Using Firewalls

If your company uses firewalls, you must open certain ports to enable the Web components to function correctly. You can set up your Web Host(s) Server in a Demilitarized Zone (DMZ) as long as the ports for the Web sites are open to the outside. Internally, the Web Host(s) must be able to access the appropriate ports on the Database Server, Saleslogix Server, and the server where the Documents and Library folders reside (typically the Synchronization Server).

Assuming your Infor CRM Web servers sit between two firewalls (one connecting to the outside and the other to your LAN), use the following table as a guideline.

Server	Port	Open on
Database Server	1433 (MS SQL)	Inside firewall
Web Host	1706 (OLEDB)	Inside firewall
	1025 and/or other higher (HTTP port configured for each Web site)	Outside firewall
	11211 (required for the Infor CRM Cache Server)	Inside firewall
Synchronization Server* (Shared Documents & Library folders)	NetBIOS 138 (UDP) 139 (TCP)	Inside firewall Inside firewall
	If using Domain Name Service (DNS), also open these: 135 (TCP/UDP - Remote Procedure Calls) 137 (TCP - DNS) 445 (TCP/UDP - DS)	Inside firewall Inside firewall Inside firewall

*The Documents and Library folders may be located on another machine, such as the Administrative Workstation (for example, if your organization does not use synchronization). Be sure to open the ports on the correct machine.

RPC Communication

When deploying the VFS from a Infor CRM server (running Application Architect) to a separate Web Host, the Windows Firewall must be configured to ensure the proper Remote Procedure Call (RPC) communication.

To configure

1. Open **Windows Firewall** and click **Advance Settings**.
2. Create a new inbound rule and select “Remote Administration” and then click **Next.**
3. Select the check boxes for all the of the available rules.
4. Click **Next.**
5. Select **Allow the Connection** and then click **Finish**.

Monitoring Web Host Performance

You can install the Infor CRM counters for Microsoft System Monitor to measure the performance of your Web Host(s). The monitor can help you identify peak times, shortcomings, and bottle necks.

To monitor

1. Open the Performance Monitor:
   - (Windows 2008 R2 Server) From the **Start** menu, point to **Programs**, point to **Administrative Tools**, and click **Reliability and Performance**. Then, select **Performance Monitor**.

   The Performance snap-in appears in the Microsoft Management Console.
2. Click the **Add** button.

   The Add Counters dialog box appears.
3. Select the **Use local computer counters** option.
4. In the **Performance object** box, select **Web Service**.
5. Do one of the following:
   - Select the **All counters** option.
   - Select the **Select counters from list** option. Then, press CTRL and click each counter you want to use.

   For more information on the function of each counter, select the counter and click **Explain**. A counter definition appears.
6. Select the **Select instances from list** option, and then click **Saleslogix**.
7. Click **Add**, and then click **Close**.

   The Performance Monitor Chart appears, and you can view the activity of your server.

   For more information on using Performance Monitor, refer to the Performance Monitor Help or the Microsoft MDSN Web site.

Appendix F Integrations

Integrations allow an exchange of data between Infor CRM and external applications and services. Infor CRM supports a number of Integrations. Each integration may communicate different information, or have different communication behavior.

Infor CRM Xbar for Microsoft Outlook

This integration type enables users to synchronize changes to contacts and activities between Infor CRM and Microsoft Outlook. Outlook Sync includes:

- Synchronizing contacts
- Synchronizing your calendar activities.

You can choose to synchronize in both directions, from Infor CRM to Outlook only, or from Outlook to Infor CRM only.

Outlook Sync is part of Infor Xbar. Information about configuring Outlook Sync is documented in “Installing Xbar for Microsoft Outlook” on page 117.

Infor CRM Back Office Extension

For information about configuring Infor CRM Back Office Extension functionality, see Appendix E: Back Office Integration on Chapter , “” on page 133.

Sync for Gmail™

This integration type enable users to share information between Infor CRM and the user's Google account. There are two levels of integration available:

- Google Sync - synchronizes contacts and calendar information
- Google Mail - records e-mail messages from Google to Infor CRM

For information about configuring this type of integration, see the documents called *Applying Saleslogix Sync for Gmail* available from the support portal Web site: www.infor.com\inforxtreme..

This document may also be published under the name Applying Infor CRM Sync for Gmail.

Sync for Gmail™ is available as an add-on to Infor CRM.

Infor CPQ

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. After CPQ is configured, the feature will be available to Infor CRM Web Client users when they are creating Sales Orders and Quotes.

To enable

1. Sign in to the **Infor CRM Web Client** as **Administrator**.
2. In the Navigation Bar, expand **Administration** and then click **Integrations**.
3. In the **Integrations List View**, click **Infor CPQ**.
4. In the **Integration - Infor CPQ** detail view,
   The integration boxes will be autofilled by default.
5. **Enabled** check box and then click **Save**.
6. Select the **Configuration Group tab** and then click **Add Configuration** (plus icon).
7. In the **Add Configuration Group** 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:
   - **Application Name:** 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.
   - **Config Group Name:** Type the intuitive name of your choice.
   - **Description:** A description of the group.
   - **Instance Name:** The instance ID that identifies your database instance. For example, InforCRM_DB. A single server can host several instances of PCM Configurator.
   - **Name Space:** The namespace of the product configurator model as defined in PCM Design Studio.
   - **Ruleset Name**: 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”.
   - Service URL: The URL for the Integration Web Service.
   - API Key: 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.
8. Click **Test link**.
9. If the test status is successful, click **OK**.
10. Repeat steps to **6** though **9** for each group you need to add.

For additional information about configuring Infor CPQ, see the Web Client online help.

Appendix G
Back Office Integration

Infor CRM Back Office Extension is a feature in the Infor CRM Web Client. When configured, it enables Infor CRM to integrate with your supported ERP system when Infor ION is also installed. Data from the ERP system is displayed in the Web Client interface. See the Web Client online Help for information about the tabs and fields that are available.

This section explains the steps for configuring Back Office Integration functionality in Infor CRM. To complete these steps successfully, Infor ION must already be installed.

Related documents

Before proceeding with the steps in this section, reading the following documents is strongly recommended:

- *Infor CRM Back Office Extension Configuration Guide for ION* documents creating mandatory connections in Infor ION Connect.
  - Chapter 3: Overview, contains an explanation of Infor ION and defines important terms.
  - Appendix B: BOD Overview explains what Business Object Documents (BODs) and how they are defined.
- *Infor CRM Back Office Extension Customization Guide* explains how to create custom BODs if those provided are do not meet your business requirements.

Both documents were installed during the Admin Tools and Servers installation (\\Program Files(x86)\Saleslogix), and can be downloaded from Infor Xtreme (www.infor.com/Inforxtreme).

Documentation specific to the supported Infor ERP product is also available on Infor Xtreme. This includes *Infor CRM Back Office Extension BOD Mapping Guide,* which provides details of the content of the default Business Object Documents (BODs).

Setting up the integration

This section describes the tasks necessary to configure the connection between Infor CRM, your ERP system, and ION Connect.

- Some steps in the Infor CRM integration depend upon tasks that must be performed on the ION Desk and vice versa. Consequently, you will be performing tasks in Infor CRM and ION Desk concurrently.
- If you need to create new ION BOD Mappings or ION Field Mappings, see the *Infor CRM Back Office Extension Customization Guide* chapter called "Any BOD".

Configuration tasks checklist

To configure Infor CRM for your ERP system, complete the following tasks in the order specified.

1. Create the Infor CRM IOBOX.

2. Verify that the IOBOX for your ERP system has already been created.
3. Create the Infor CRM connection points and document flows.
4. Ensure you have the Infor CRM Logical ID from the ION Desk.
5. Create a connection between Infor CRM and the IOBOX for Infor CRM.
6. Configure the database connection (MSSQL or Oracle DB).
7. Set Back Office Extension as your integration.
8. Install and configure the BOD pack.
9. Configure Back Office settings.
10. Clone a new Back Office (optional).

See the appropriate section of this appendix for detailed instructions on how to complete these tasks.

Before you begin

Ensure that Multi-currency in Infor CRM is enabled. See the topic called “Managing Currency” in the Administrator help file for more information. The currency code must match your ERP base currency.

Creating the Infor CRM IOBOX

The Infor CRM IOBOX is created on the Infor CRM database server. The IOBOX provides a bi-directional database that serves as a destination for exchanging BODs from Infor CRM. Scripts are downloaded from ION Desk and then executed on the Infor CRM database server.

For steps to complete this task, see the section called Creating Infor CRM IOBOX in chapter 4 of the document called *Infor CRM Back Office Extension Configuration Guide for ION*.

Verifying that the IOBOX for your ERP system has been created

The IOBOX for your ERP system is typically created by your ERP administrator.

1. On the machine where you installed ION, open **ION Desk** > **Connection points**.
2. In the grid, locate and double-click your ERP.
3. Locate the **Logical ID** field and make a note of the information it contains.
   You will need this information later in the configuration process.
4. Verify that the information in the **Tenant** field is the same as the information in the Tenant field in the IOBOX for Infor CRM.

If the Logical ID field is not populated, contact your ERP team administrator and request that the connection point be defined.

Creating Infor CRM connection points and document flows

Document flows define the sequential flow of Business Object Documents (BODs) between multiple application connection points. Solution XML-based document flows are provided for most supported ERP products and provide a sample template you can use to create connection points and document flows. This task is performed in ION Desk. For steps to complete this task, see the section called Understanding connection points and document flows in chapter 5 of the document called *Infor CRM Back Office Extension Configuration Guide for ION*. (Infor CRM Configuration Guide for Infor ION.pdf).

Using the provided Infor Sample workflows is recommended for first time installations, however, the guide also contains instructions for creating your own workflows should the sample document flows not meet your business needs.

- A Connection point provides configuration integration details for an ION- enabled application (a gateway) that ION then uses to reference that application.

  Each ION integration requires at least two connection points to be defined: one for Infor CRM and the other for the host system of record (ERP).
- Connection points are not activated until you activate a document flow.

Ensure you have the Infor CRM Logical IDs from the ION Desk

This is the information you captured when updating the Infor CRM based application task on the ION Desk. See the document called *Infor CRM Back Office Extension Configuration Guide for ION***,** Chapter 5, heading “Update the Infor CRM based application task”, step number 7.

Configuring the IOBOX connection

Use the ION Connection Manager (IONConnectionManager.exe) to define the connection string to enable the Back Office Extension job services to connect to the Infor CRM IOBOX database. The Infor CRM IOBOX functions as a bi-directional gateway by which ION provides Infor CRM with Sync/Show BODs and enables ION to receive Infor CRM’s outbound Process BODs. The IOBOX was created in “Creating the Infor CRM IOBOX” on page 134.

Configuring the database connection for Microsoft SQL Server

1. On the computer where you installed **Admin Tools and Servers**, browse to the location folder where you installed Infor CRM.
   The default location is \\Program Files (x86)\Saleslogix.
2. Double-click **IONConnectManager.exe**.
3. In the Tenant field, type **INFORCRM**.
4. Click **Add / Edit**.
5. In the **Provider** tab, select your SQL Server version.
   For example, SQL Server Native Client 10.0or 11.0.
6. Click **Next**.
7. In the **Connection** tab, specify this information:
   a. **Select or enter a server name**:
      For example, 111-111-111-111.compute-1.amazonaws.com.
      (This example path is appropriate for both Cloud and localserver).
   b. **Use a specific user name and password:**
      i. Clear the **Blank password** check box.
      ii. Specify the User name and Password for your Infor CRM database server.
      iii. Select the **Allow saving password** check box.
   d. Select the database:
      Expand the list to select the required database.
8. Select the **All** tab.

9. In the list of values, select **Persist Security Info**.
10. Click **Edit Value**.
11. Expand the **Property Value** list to select **True**.
12. Click **Test Connection**.
13. Click **OK** and close the ION Connection Manager.

Configuring the database connection for Oracle

Before proceeding with these steps, you must create a Net Service Name (database alias). Refer to the Oracle documentation for instructions.

1. On the computer where you installed **Admin Tools and Servers**, browse to the location folder where you installed Infor CRM.
   The default location is \\Program Files (x86)\Saleslogix.
2. Double-click **IONConnectManager.exe**.
3. In the Tenant field, type **INFORCRM**.
4. Click **Add / Edit**.
5. In the **Provider** tab, select **Oracle Provider for OLE DB**.
6. Click **Next**.
7. In the **Connection** tab, specify this information:
   a. **Data Source**:
      Enter the Net Service name for your IOBox database.
   b. **Use a specific user name and password:**
      i. Clear the **Blank password** check box.
      ii. Specify the User name and Password for your Infor CRM database server.
      iii. Select the **Allow saving password** check box.
   d. Select the database:
      Expand the list to select the required database.
8. Click **Test Connection**.
9. Click **OK**.
10. Select the **All** tab.
11. In the list of values, select **Persist Security Info**.
12. Click **Edit Value**.
13. Expand the **Property Value** list to select **True**.
14. Click **Test Connection**.
15. Click **OK** and close the ION Connection Manager.

Setting Back Office Extension as your integration

After configuring the connection points, you must now set up your Back Office Extension within Infor CRM.

1. Sign in to **Infor CRM** as the administrator.
2. In the **Nav bar**, click **INTEGRATION**.
3. Select **Integrations.**
4. In the **Integrations** main view, click **Back Office Extension**.
5. In the **Options** tab, specify the following information:
   a. **Tenant**: Enter the tenant name. For example, Infor.
   b. **Logical ID**: Enter the Infor CRM connection point Logical ID. For example, infor.cloud.crm. This is the Logical ID you made a note of when you completed the tasks in “Ensure you have the Infor CRM Logical IDs from the ION Desk” on page 135.
6. Click **Save.**
7. In the **Back Offices** tab, locate the BOD pack for your ERP, select it, and click **Clone.**

8. In the **Logical ID** field, enter the Logical ID for your ERP system.
   This is the Logical ID you made a note of in “Ensure you have the Infor CRM Logical IDs from the ION Desk” on page 135.
9. In the detail view for the cloned back office, click the **Activate** check box.
10. Save and close the clone.
11. In the **Back Offices** tab, locate and select the BOD pack for your ERP from which you created the clone.
12. In the detail view, clear the **Active** check box**.**
    This is important as multiple back offices cannot have the same Logical ID.

Disabling an integration

If necessary, you can disable the job process(es) for the back office extension in the Back Office Extension.

1. Sign in to **Infor CRM** as the administrator.
2. In the **Nav bar**, click **INTEGRATION**.
3. Select **Integrations.**
4. In the **Integrations** list view, click **Back Office Extension**.
5. In the **Integrations - Back Office Extension** detail view, clear the **Enabled** check box.
6. Click **Save**.

Install the BOD pack bundle(s)

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.

For a full discussion of BODs, see the *Infor CRM Back Office Extension Configuration Guide* appendix called “BOD overview”.

To install a BOD Pack bundle

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 BOE Pack LN 02.zip.
2. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
3. In the **Application Architect,** in the **Project Explorer,** right-click the project, and then click **Install Bundle**.
4. Navigate to the folder where you copied the BOD Pack.zip, and then click **Open**.
5. On the **Select Bundle** screen, click **Next.**
6. On the **Select Items** screen, ensure the **Portals** option is selected.
7. Click **Next**, and then click **Finish**.
8. Build and deploy the portal.

Configuring back office settings

You can now configure the back office settings in Infor CRM.

1. Sign in to **Infor CRM** as the administrator.
2. In the **Nav bar**, click **INTEGRATION**.
3. Select **Integrations.**
4. In the **Integrations List view**, click **Back Office Extension**.
5. In the **Back Offices** tab, select the desired back office hyperlink.
   This is the name of the ERP system used by your organization. For example, Infor LN.
6. In the detail view, specify the following information:
   a. **Name:** The field displays the name of the selected back office. It can be customized with a unique name.

b. **Logical ID**: Specify the Logical ID for your ERP.
c. **Active:** Select this check box to allow BODs that correspond to the logical ID for this back office to be processed.
d. **Account:** If a contact is published from the ERP and it has no related account or the account does not yet exist this field displays a Default Account.
e. **Default Account Manager:** Select the default account manager to use in the absence of the specified Sales Person Role.
f. **Default Record Owner**: Select the default record owner to use in the absence of the specified Sales Person Role.
g. **Sales Person Role:** (optional) Select the desired Related Sales Person Role to use for automatic ownership assignments.
h. **Price Type**: Expand the list and select the supported protocol that you want to use. Required for Price and Availability configuration.
Supported protocols include SOAP, RESTful-JSON, and RESTful- Key Value.
i. **Price End Point**: The Web URL for the Host system interface. Required for Price and Availability configuration.
j. **Price User Name**: (optional) The user name used to sign into the Host system. Supports the Price and Availability configuration.
k. **Price Password**: (optional) The password used to sign in to the Host system. Supports the Price and Availability configuration.

7. Click **Save.**

Cloning a new back office (optional)

1. Sign in to **Infor CRM** as the administrator.
2. In the **Nav bar**, click **INTEGRATION**.
3. Select **Integrations.**
4. In the **Integrations** main view, click **Back Office Extension**.
5. In the **Back Offices** tab, select the desired back office hyperlink.
6. In the **Back Office** detail view, select **Clone**.
Clone is the circular icon in the detail view menu bar.
7. Specify the following required information.
   - A unique name
   - A new Logical ID.
   - Ensure the Active check box is selected.
8. Click **Save.**
9. In the **Integrations** main view, click the hyperlink for the back office that you used to create the clone.
10. In the detail view, clear the **Active** check box.
This deactivates the back office.
11. Click **Save.**

Modifying how information is displayed

The configurations in this section explain how to replace Infor CRM Sales Order ID, Return ID and Account type with the corresponding information from the ERP system.

For information about applying additional customizations to your integration, see the document named Infor CRM Back Office Extension Configuration Guide for ION.

Adding users and distribution groups

To set up users and distribution groups for Infor CRM users who require access to Infor ION in order to view of update information or to troubleshoot errors, the following resources are available:

- Infor ION Connect Administration Guide contains information about adding ION Desk users and setting ION Desk authorization levels.
- Infor Federation Services Administration Guide contains information about configuring distribution groups.

Both documents are available at www.infor.com/Inforxtreme.

Understanding Roles and Security

Back Office Extension integration security is based on two factors:

- Role Security
- Field Level Security

The recommended roles for Integration are:

- Standard User - assign the Back Office role.
  This user will be able to see all of the Master Data and Transactional Data entities for ICBOE.
- Admin User - assign the Back Office, Administration, and Integration roles.
  This user will be able to view and modify any of the Back Office Extension pages.

Record ownership

In most implementations, record ownership is assigned at the Account level, with the dependent entities inheriting record ownership from the Account. In some cases, it may be desirable to assign record ownership at a lower level. The Infor ION BOD structure supports the possibility of assigning record ownership by means of the SalesPersonReference element contained in the CustomerPartyMaster (Account entity), ShipToPartyMaster (ErpShipTo entity), Quote and SalesOrder BODs.

Ownership inheritance rules are defined by the Inherit Owner From property in the BOD Mapping.

Infor CRM provides two options for configuring Infor CRM ownership for the records generated by the interface:

- The Default Account Manager and Owner can be specified on the Back Office.
- The SalesPersonRole that is used for ownership assignment can be selected on the Back Office.In this case the interface watches for the corresponding SalesPersonReference in the SyncCustomerPartyMaster, SyncQuote, and SyncSaleOrder BODs, and assigns Infor CRM record ownership that is based on the Account Manager and Owner specified for the Person specified by the referenced SalesPersonRole in the BOD by the Back Office. If no related person is found, theDefault Owner will be assigned.

Out-of-the-box, ownership for Accounts can be assigned using the SalesPersonReference by updating the Back Office Sales Person Role selection and updating the Record Owner and AccountManager selections on the respective Person records. By default, ownership for ERPShipTo, Quotes,and Sales Orders is inherited from their respective Account. To directly assign ownership to ERPShipTo,Quote, or Sales Order with the Sales Person Role contained in their respective BODs, select “None”in the Inherit Owner From field on the respective ION BOD Mapping record of the desired BOD.

Assigning ownership to published BODs

Before beginning this task you must have:

- Configured ION Connection points and document flow,
- Configure the Back Office for the host system
- Publish the SyncPerson BODS to define the set of ERP Sales Persons.

To assign ownership to published BODs, follow these steps in the order specified.

Before configuring back office record ownership, you must update the Filter property of the Sales Person Roles Pick List values with the Logical ID for the host system of record.

1. Sign in to the **Infor CRM Web Client** as the administrator.
2. In the **Nav bar,** expand **Integration**, and click **ERP Persons**.
3. Update the **Role**, **Owner**, and **Account Manager** for each of the **ERPPerson records**.
4. In the **Nav bar,** expand **Administration** and click **Pick Lists**.
5. Update the **Sales Person Roles**.
   If additional roles are needed to be compatible with your host system of record, you can add them. See the help topic called for more information.
   a. In the **Items** tab, click the **Edit** hyperlink for the desired item.
   b. In the **Edit Item** window, specify the following information:
      - **Text:** Do not modify this box for existing entries.
      - **Code:** Do not modify this box for existing entries.
      - **Order:** Do not modify this box for existing entries.
      - **Filter:** Update the pick list filter with the Logical ID of the corresponding back office.
      - **Is default item:** Select this check box to set the item as the default list item.
6. Click **Save**.
7. Repeat step **9** for each of the Sales person role options required for this back office.
8. Add additional Roles as needed to be compatible with your host system and update the filter property for each of the Pick List values with the Host system Logical ID.
   The default values are Internal and External.
9. Update the Integrations, Back Office Extension, Back Offices tab, host system based Back Office, and Sales Person Role with the desired Sales Person Role to base the ownership assignments.
   Note: The Back Office Sales Person Role Pick list values are auto filtered based on the Logical ID of the Back Office
10. Publish the CustomerPartyMaster BODs.
    The Infor CRM ownership for Account is automatically assigned based on the publish BOD's SalesPersonReference for the selected Sales Person Role.

Multi-company configuration

An ERP's multi-company functionality enables the grouping of business operations recorded in ERP into one or many discrete groupings called financial entities. Infor CRM provides the ability to manage data by organizing enterprise operations into multiple financial entities. This functionality manages the segmentation and consolidation of all master and transaction data that result from the activities in the enterprise and link to each financial company.

Multi-company manages the new ERP Unique IDs of the publish BODs to the correct ERP accounting entity.

The multi-company configuration is an optional part of the Infor CRM installation, configuration and implementation process. If you are not using multi-company functionality for your Infor CRM implementation, you can omit this section.

Understanding the ERP Unique ID

The ERP Unique ID is a globally unique value that is assigned to a Business Object Document (BOD) instance. In addition to supporting customer any BODs, Infor CRM supports these 15 Master Data and Transactional BODS.

All BODs require a ERP Unique ID in the list of required fields for Any BODs.

Master Data BODs	Transactional BODs
BillToPartyMaster	Customer Return
CodeDefinition	Invoice
ContactMaster	Quote
CustomerPartyMaster	Receivable Transaction
ItemMaster	Sales Order
Location	Shipment
PayFromPartyMaster	
Person	
ShipToPartyMaster	

Example 1

The following example shows the ERP Unique ID of a Master Data BOD

CustomerPartyMaster (Account)

Customer ID = C00001

Accounting Entity = 45WD

ERP Unique ID = 45WD:00001

Example 2

The following example shows the ERP Unique ID of a Transactional BOD:

Invoice:

Invoice ID = INV00231

Accounting Entity = 45wd

Location ID = 1

ERP Unique ID = 45WD:1:INCV00231

In this example, if the Location ID of the Transactional BOD was null, the ERP Unique ID would be reflected as 45WD::INV00231.

Configuring multi-company

1. Sign in to the **Infor CRM Web Client** as **Administrator**.
2. In the **Nav Bar**, click **INTEGRATION**, and then select **Integrations**.
3. In the **Back Offices** tab, select the desired back office
4. In the **Accounting Entities** tab, click the Edit hyperlink.
5. Make the desired changes.
6. Click **OK**.
7. Click **Save**.

You can use the Accounting Entities tab to add or delete an accounting entity.

Multiple Back Office configuration

Infor CRM can be configured with multiple Back Offices. See the Chapter called Connecting Infor CRM to Infor ION in the *Infor CRM Back Office Extension Configuration Guide for ION* for more information.

Glossary

Account A company with which there is a current or potential business relationship. Accounts are owned by an individual user, a team of users, or everyone.

Administrative User A user who can perform tasks in the Administrator normally reserved for the system administrator.

Administrative Workstation The primary computer for administering and customizing Infor CRM. Usually, this is either the system administrator's personal computer or a separate computer dedicated to Infor CRM. The Administrator, Architect, Application Architect and Infor CRM Client are usually installed on this computer.

Agents A method of scheduling reports, running Basic scripts, SQL scripts, etc., at intervals specified in the Administrator and Synchronization Server profile. Agents can be scheduled to run once or on a regular basis.

Application Architect A development environment containing the tools that allow developers to rapidly build, customize, manage, and deploy coded and codeless Web application solutions with one-click functionality.

Architect A development environment for creating customized views, menus, toolbars, and scripts for Infor CRM.

Back Office A system that manages your financial, manufacturing, or distribution processes and acts as the System of Record (SPOR) for your business.

Back Office Extension A feature in Infor CRM that, when configured and supporting products (a supported ERP system and Infor ION) are installed, enables integrating with supported Infor ERP products.

Bundle A bundle is a group of plugins or other customizable components that are packaged together for installation as a unit, rather than having to move them one by one, or re-create them on every database. Bundles containing Network plugins (.sxb files) are installed using the Administrator. Bundles containing Web customizations (.zip files) are installed using the Application Architect.

BOD Field mapping A collection of associations between Infor CRM and the back office system (ERP) fields to support data synchronization and integration between the two systems.

Business Object Document (BOD) The common XML message structure provided by OAGIS. It provides a message architecture based on reusable components. See Nouns and Verbs.

Cache Server Stores Web data which allows the cache to be real-time.

Concurrent Users The number of users accessing the database at any one time. In Infor CRM, a license type that enables multiple Infor CRM users to share the same license. For example, if you have 40 users and 30 Concurrent User licenses, all 40 users can log on to Infor CRM but only 30 can be logged on at the same time.

Contacts The prospects or customers in a company (account) that users interact with. Each account can contain one or more contacts.

Contract An agreement between your company and the customer to provide support services, either for free or for a specified fee.

Customer Service Customer Service allows designated users to track, qualify, and resolve customer questions and issues.

Database Manager Part of the Administrator and Architect that allows you to add, view, and delete tables and fields, as well as name indexes, in the Infor CRM database.

Defect A record describing a problem in a product or process, or a feature request for a product or process.

Entity A business object, such as account or product that contains business rule methods and events, relationships, properties, and forms. Entities can also have other related entities associated with them, either through child relationships or extensions.

Form A Smart Part containing normal content, markup, and controls. A Web form is similar to Forms created in the Architect.

Host A term commonly used for a Infor CRM database that supports both Network and Remote users.

Glossary

Host System Of Record A term commonly applied to the ERP system used for your Back Office.

Infiles A folder in which the main office, or Remote users or Remote Offices, place sync files during synchronization.

Infor CRM Client An installation of the Infor CRM Client where the user is directly connected to a network database to access and manage customer accounts, contacts, tickets, defects, activities, and related information.

Infor Configure Price Quote (CPQ) A visual, rules-based configurator software that integrates with Infor CRM to accelerate product configuration, pricing, and quoting. It captures your engineering and pricing knowledge to enable your sales reps and/or dealers to quickly become product experts.

Join A database operation that connects two database tables having a common field.

Library A central repository for company information. The library may include product information, policies and procedures, presentations, and so on.

Logging Folders Logging folders are

Lookup Lookups enable users to search for information under any of the major families (for example; account, contact, ticket, and so on) that shares certain characteristics. Once a lookup is created, you can save the result as a group. Lookups can be managed from the Architect or Administrator.

Nouns Used in Infor Business Object Documents, Nouns describe a common business object and are composed of components which are basic building blocks shared across all nouns.

Offline Web Client Remote users that keep a subset of the main database on their computers (such as a laptop) and use synchronization to transfer changes between their system and the main office. Offline Web Client users make changes to their local database using the Web Client.

on-premise (on-prem) Software that is installed and run on computers of the individual or organization using the software, rather than at a remote facility.

OLE DB Provider A client-side component that handles all database access and applies security.

Opportunities Potential sales to accounts or contacts.

Outfiles A folder in which the main office places sync files during synchronization. Remotes obtain files from this location.

Outlook Sync an optional component available with Infor CRM Xbar. It allows users to share activities and contacts between Infor CRM and Microsoft Outlook.

Package A group of related entities, forms, Smart Parts, templates, and aliases that are grouped together under a common name. Packages make it easier to manage your Web customizations.

Page A unit within a Web Portal. A page is a collection of workspaces.

Personal Web Server Hosts the Infor CRM portals on the Remote computer. The Infor CRM Personal Web Server functions as a personal Web server for Offline Web Clients.

Plugins Components that customize and add functionality to Infor CRM. Plugins include views, processes, reports, templates, Visual Basic scripts, and SQL scripts.

Portal Represents a collection of Web pages.

PortalDeployments A folder in which the main office places deployed Web portals to be delivered to Remote users and Remote Offices.

Process Orchestration Allows you to create and configure process definitions and manage them with the Process Orchestration Host. Processes can be created for any entity, and any entity can be associated to multiple processes.

Processes A plugin that represents a series of tasks executed in a specific sequence over a set time period. Processes are used to perform repetitive tasks, implement a sales process, or provide an automated way of following up with customers. The Web components may only schedule processes and change process status.

Project A group of Web packages or plugins that are grouped together for easy retrieval and use.

Relational Database Management System (RDBMS) An engine and method of managing a database consisting of tables (rows and columns) and the relationships between those tables.

Remote Client Infor CRM Client users that keep a subset of the main database on their computers (such as a laptop) and use synchronization to transfer changes between their system and the main office. They can also connect directly to the main office database using a LAN/WAN connection.

Remote Office A group of users that access a single Remote Office database directly. Unlike Remote users, Remote Office users do not synchronize with the database at the main office. Instead, the remote office regularly synchronizes with the database at the main office.

SData Using SData features, you can expose an entity or a business rule to RESTful-based Web services, allowing you to integrate and enhance Infor CRM data with data from outside the application.

Security Determines what a user can access in Infor CRM. Security is controlled by a combination of account ownership, management hierarchy, and level of access rights to information.

Security Profile Determines each user's access to information, tables and fields, and functionality.

Site Code A unique identification code assigned to each Network user, Remote user, Synchronization Server, and Remote Office that represents the user or component.

SLX Server Components that primarily handle logging and licensing for the Infor CRM system. The computer where the components are installed is also referred to as the SLX Server and it may be combined with the CRM Database Server

SLXService user A Windows logon name with security permissions that allow the Infor CRM Server and Synchronization Service to access all necessary directories.

SpeedSearch Enables users to find information stored in the Infor CRM database or external files.

Subscription Allows a Remote user to select or subscribe to accounts used on a regular basis and store the accounts in the Remote user's local database. Subscription rules identify the criteria for selecting accounts.

Synchronization The process of reconciling changes between remotes (users or Offices) and Network users. Synchronization can occur through a direct connection (LAN/WAN), FTP, or HTTP.

Synchronization (Sync) Server The application that runs synchronization and agents. It can also refer to the hardware on which the Sync Server application resides.

Synchronization Service A Windows service that communicates with the Synchronization Server(s) and SyncServices.cfg file for scheduling.

Team A group of users who have access to the same accounts. Members of the same team may have different security access to data.

Ticket A record of a call relating to a question or problem experienced by the customer.

Transaction Exchange Files (TEFs) Files that are transferred between Remote users and Remote Offices, and the main office to synchronize data.

Verbs Used in Infor Business Object documents, Verbs describe the action to be applied to the noun. For example, the ProcessSalesOrder BOD is constructed from the SalesOrder Noun and the Process Verb. BOD messages are based on common nouns combined with the verb.

WebDll User A valid network logon name created when you implementation uses Web components. Has security permissions that allow the Web Host and the Infor CRM Job Service to access all necessary directories.

Web Remote Office A group of Remote users that access a single Remote Office database using the Web Client.

WGLogs A folder in which Network users place transaction files as changes are made to the database.

Glossary

Index

Numerics

A

B

C

D

E

P

R

S

T

U

V

W