



# Applying SNC Update 01 for Version 8.5

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# Introduction



Infor CRM has been rebranded as Infor CRM SLX in v.8.5.0.01. Infor CRM SLX is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

## About this guide

This document describes SNC 01 for Infor CRM SLX version 8.5. SNC Updates provide modifications to pieces such as the Provider, Infor CRM Server, Admin, Architect, Infor CRM SLX Client, SpeedSearch, Sync Server, Sync Client, and so forth. Applying these updates may also be required for Web environments when the fix is for the Provider, Server, or SpeedSearch.

## Prerequisites

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

- Infor CRM SLX version 8.5



Do not install SNC 01 for Infor CRM SLX 8.5 on any other Infor CRM SLX version.

## Additional considerations

- Infor CRM 8.5.0.01 is only compatible with:
  - Sync for Gmail versions 1.2 and later
  - Sync for Exchange versions 1.0.2 and later

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://conciierge.infor.com/> and create a support incident.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).



# Chapter 1

## What's New in this update

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This chapter lists all breaking changes, new features, and deprecated features for Infor CRM SLX since version 8.5.

### Breaking Changes

This section contains breaking changes introduced since Infor CRM SLX version 8.5

#### 8.5.0.01

- There were no breaking changes in this release.

### Features added in this update

This section lists the features available in each update and indicates the type of update required, as well as any additional pieces required to fully install the feature.

Application	Feature	Requires			
		SNC	Web	BOD Pack	Infor Ming.le
<b>8.5.0.01</b>					
<b>Web Client</b>					
	<b>Mail Merge</b>	x	x		
	Mail Merge is supported in all supported browsers and can be accessed in the Web Client and from Microsoft Word after installing the Infor CRM Mail Merge for Microsoft Word add-in. For steps, see the Web Client help topic "Installing Infor CRM SLX Mail Merge for Microsoft Word".				
	Ability to perform a mail merge with contacts associated with sales orders, quotes, contracts, returns, and tickets in addition to accounts and opportunities.				
	Ability to fulfill literature requests in all supported browsers.				
	Ability to complete mail merge steps in a sales process in all supported browsers.				
	<b>Calculated fields</b>	x	x		
	After version 8.5.0.01, calculated fields created in the Web Client, or calculated fields converted by the conversion utility are created in the specified base table and the CalculatedFieldData table. In a mixed Web and Windows environment, Infor CRM SLX strongly recommends creating and editing calculated fields in the Web Client and then using the computed fields in the specified base table in all clients. Calculated fields created and edited in the Web Client are available in any Infor CRM SLX client using the new column in the specified base table. In Query Builder for Windows you will see				

Application	Feature	Requires			
		SNC	Web	BOD Pack	Infor Ming.le
	<p>duplicate fields with the same name, one that represents a calculated field, and the other which represents a computed column. Either field is valid.</p> <p>Calculated fields created outside of the Web Client will not be available in the Web Client until the conversion utility is run.</p> <p>Edits made to a calculated field in the CalculatedFieldData table will not be available in the Web Client. The edits will need to be repeated in the Web Client version of the calculated field.</p>				
<b>Application Architect</b>					
	<b>Upgrade safe improvements</b>	<b>x</b>	<b>x</b>		
	The Manage Customizations view allows you to review a list of files that have changed or are out of sync with recent Infor CRM SLX updates.				
	<b>64-bit Application Architect</b>	<b>x</b>	<b>x</b>		
	The 64-bit Application Architect requires a change to DataLink Manager and a change to the steps for configuring database connections for Application Architect. See <a href="#">"Configuring Database Connections for Application Architect" on page 1</a> .				



See the "What's New in this Release" topic in the online Help systems for more information about the new features.

## Features deprecated in this update

This section lists the features deprecated in each update.

Application	Feature
<b>8.5.0.01</b>	
Web Client	
	<p><b>Mail Merge</b></p> <p>The changes to Mail Merge resulted in deprecating the following mail merge features:</p> <ul style="list-style-type: none"> <li>■ Address labels are now only available through reports, not from the Literature Requests list view Literature tasks or as a part of mail merge.</li> <li>■ Letter and non-email based templates are now only available to be managed using the Infor CRM Word Add-in. Only email templates can be managed from the Compose menu.</li> <li>■ Email mail merge templates managed in the Web Client do not support special fields including SQL values, tables, or images.</li> <li>■ Output to Fax is no longer supported in either the Web Client or Microsoft Word add-in.</li> <li>■ Output to Printer from the Web Client mail merge is no longer supported. Output to Printer is available only from the Mail Merge for Microsoft Word add-in.</li> <li>■ Attaching a document or Infor CRM library file to a template is no longer available. In the Web Client mail merge, attaching a file or Library file is not available. In the Word add-in, files and Library files can be attached prior to starting a mail merge.</li> <li>■ "One-off" mail merges to Letter or Email are now handled as part of the standard mail merge process.</li> <li>■ The Notes/History option, Send to Word, has been removed and may be replaced in a future release.</li> </ul>



Application	Feature
	<ul style="list-style-type: none"> <li>■ Literature Requests with a cover letter will only be available as output to File, output to Email is no longer supported.</li> <li>■ Specifying base templates for contact and lead email, fax, or letter templates are no longer supported and those user options have been removed.</li> <li>■ The Most Recently User templates option is no longer supported in the Web Client or Infor CRM Word Add-in and has been removed. The Infor CRM Word Add-in automatically displays the 5 most recently used templates on the Open Template drop-down list.</li> </ul>
Application Architect	
	<ul style="list-style-type: none"> <li>■ Importing from another project.</li> <li>■ Creating a project backup</li> <li>■ You can only restore from the Infor CRM SLX provided back up from version 8.4.0 or 8.5.0.</li> <li>■ Creating a manifest by project differences</li> </ul>

For a list of issues fixed since v8.5 see the [Resolved Issues](#) chapter.



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# Chapter 2

## Applying the Update

# 2

Apply this to all computers where the following components have already been installed:

- Administrative Tools and Servers
- Remote Office
- Infor CRM SLX Client
- Infor CRM SLX Remote Client



Install the Infor CRM SLX v8.5.0 Update 01.sxb bundle using the Administrator.

## Installing the update

To begin the install

1. Close all Infor CRM SLX applications on the computer to which you are applying the .
2. Extract the contents of the **Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.zip** file to a temporary folder.
3. Navigate to the folder where you extracted the files and double-click **Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.exe**.
4. Click **Next**.
5. On the **Welcome** screen, click **Install** to install the patch.

Automated installations can be used to install the Infor CRM SLX Client for new users. When the automated installation is updated using this method, it contains the initial version of the Infor CRM SLX Client and all service packs and updates applied to your system.

6. On the **Completed** screen, click **Finished**.

## Installing bundles using the Administrator

Use the Administrator to install the Infor CRM SLX v8.5.0 Update 01 bundle.

To install the bundle

1. Open the **Administrator**.
2. On the **Navigation Bar**, click **Bundles**.
3. Click **Install**.
4. Navigate to the folder where you extracted the files and double-click the bundle named **Infor CRM SLX v8.5.0 Update 01.sxb**.
5. After the bundle is loaded, the **Choose Actions to Install** dialog box appears. View the plugins to be installed with this release, and then click **OK**.

6. During installation, click **Yes**, **Yes to All**, or **OK** on any confirmation message boxes for overwriting system plugins or indexes.

## Create a Remote User or Remote Office Database

In Infor CRM v8.5.0.01, you must create new Remote databases. Create these databases using a Microsoft SQL Server Express instance or the SQL Host Server.

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.



Web implementations should wait to create remote databases until after they have installed Web Update 01 for version 8.5, following the instructions in the *Applying Web Update 01 for Version 8.5* document.

### To create a remote database

1. In the Infor CRM SLX Administrator, on the Administrator **Tools** menu, do one of the following depending upon whether you are creating a Remote User database or a Remote Office database:
  - Click **Create Remote User Databases**.
  - Click **Create Remote Office Databases**.
2. In the **Create Databases** dialog box, do one of the following:
  - 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.
  - Under **Available Remote Offices**, select the offices(s) for which the database(s) will be created, and click the arrow to move them to the **Selected Remote Offices** box.
3. Configuring the default database settings is explained in “Setting Database Options” in the *Infor CRM SLX Implementation Guide*. To change the settings for this user only, click **Options** or **Properties** and configure the changes.
4. 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.

**Note:** The default location where the remote databases are created is specified in Tools, Options, Database tab, in the “Create Remote DB in server directory” field.

5. Click **OK** to confirm successful completion.
6. Transfer the database to the appropriate 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 that the Remote (User or Office) computer has access to it.

- If the Remote is not connected to the network, copy the database to the user's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote user, and instruct the user to copy it to his or her computer and unzip it.



# Chapter 3

## Changes in this release

# 3

This chapter lists all of the changes to Infor CRM since version 8.5.

Changes are listed in the following sections by the location of the change (patch or bundle), type (form, script, and so on), and then alphabetically by name within the table for each type.

- Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.zip includes:
  - Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.exe
  - Infor CRM SLX v8.5.0 Update 01.sxb

### Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.exe

The Infor\_CRM\_SLX\_v850\_SNC\_Update\_01.exe patch installs the following files.

#### Executables

The following lists executables added or updated since v8.5.

File Name	File Version	8.5.x
Admin.exe	8.5.0.1874	01
Architect.exe	8.5.0.1874	01
SalesLogix.exe	8.5.0.1874	01
SLXDBChecker.exe	8.5.0.1874	01

#### Help and Documentation files

The following lists help files or documents added or updated since v8.5.

File Name	8.5.x
Admin.chm	01
ApplicationArchitect.chm	01
Architect.chm	01
Dashboard.chm	01
DataLinkManager.chm	01
DBManager.chm	01
DeveloperTips.chm	01
Getting Started with Infor CRM Windows Client.pdf	01
ImportWiz.chm	01
Infor CRM Quick Reference for the Customer Service and Support User.pdf	01

File Name	8.5.x
Infor CRM Quick Reference for the Customer Service and Support User.pdf	01
Infor CRM Quick Reference for the Web User.pdf	01
Integrations.chm	01
MailMerge.chm	01
ManageSalesProcess.chm	01
PortalExplorer.chm	01
QueryBuilder.chm	01
ReportingAssistant.chm	01
ReportManager.chm	01
SalesClient.chm	01
SalesLogixAdvancedOutlookIntegration.chm	01
SLX Connection Manager.chm	01
SLXMonitor.chm	01
SLXOLEDBProvider.chm	01
SLXQuickForms.chm	01
SpeedSearchClient.chm	01
SyncServer.chm	01

## Infor CRM SLX v8.5.0 Update 01.sxb bundle

This bundle contains the following:

### Database Objects

The following lists database objects added or updated since v8.5.

Database Object	8.5.x
CreateNameLFSql : MSSQL :	01
CreateNameLFOracle : Oracle :	01

### Execute SQL statements

The following lists indexes added since v8.5.

Description	8.5.x
DELETE FROM SYSDBA.CALCULATEDFIELDSDATA WHERE NAME = 'User Name( Last, First)' AND Basetable = 'USERINFO'	01
UPDATE SYSDBA.SYSTEMINFO set SNCVERSION = '8.5.0.01'	01
UPDATE SYSDBA.SYSTEMINFO set DBVERSION = '8.5'	01
UPDATE SYSDBA.SECTABLEDESFS SET DISPLAYNAME='ERP Territory' WHERE TABLENAME = 'ACCOUNT' and FIEDNAME = 'ERP TERRITORY'	01



## New or Updated Plugins

The following lists plugins added or updated since in v8.5.

Plugin Name	8.5.x
(Menus System:Standard Menus)	01



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# Chapter 4

## Resolved Issues and Improvements



SNC Update 01 for Infor CRM SLX version 8.5 addresses the following issues:

### Issues fixed in v8.5.0.1

Defect	Description
INFORCRM-25918	The DBVersion in the SystemInfo table was not updated to 8.5.
INFORCRM-26178	Editing a condition in Query Builder and saving without making any changes adds additional quotes to the condition.
INFORCRM-26300	In Query Builder group conditions based on a date are missing the calendar control icon.
INFORCRM-27153	Adding a custom file share Speedsearch index displays the error "An extended error has occurred [00AE33B4].
INFORCRM-27169	Windows Client updated to incorporate the name change to Infor CRM SLX.
INFORCRM-27202	An error is returned when changing the Family name on a report.
INFORCRM-27358	Activity reverts to the previous contact after editing, and then refreshing the calendar.
INFORCRM-27373	In the Admin the Password option "Do not allow username as password" changed to "Do not allow username as password" and when enabled users cannot log into Infor CRM SLX if their username is part of their password.
INFORCRM-27524	Cannot open Integrity Checker if admin password contains " (double quote).
INFORCRM-27532	The Integrity Checker Task Manager shows the current user's password.

