# Applying Web Update 01 for Version 8.5

**Publication Information**

Release: 8.5.0.01

Publication date: 03/01/2022

# Contents

# 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 WebUpdate 01 for Infor CRM SLX version 8.5.

## Prerequisites

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

- Infor CRM SLX version 8.5
- 8.5 SNC Update 01

Do not install WebUpdate 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://concierge.infor.com/ and create a support incident.

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

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# Chapter 1
# What's New in this update

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 |
| **8.5.0.01** | | | | | |
| **Web Client** | | | | | |
| | **Mail Merge** | 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.<br><br>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. | | | | |
| | **Calculated fields** | 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.<br><br>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.<br><br>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 |
| | duplicate fields with the same name, one that represents a calculated field, and the other which represents a computed column. Either field is valid.<br>Calculated fields created outside of the Web Client will not be available in the Web Client until the conversion utility is run.<br>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. | | | | |
| **Application Architect** | | | | | |
| | **Upgrade safe improvements** | x | x | | |
| | 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. | | | | |
| | **64-bit Application Architect** | x | x | | |
| | 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 "Configuring Database Connections for Application Architect" on page 8 | | | | |

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 |
|---|---|
| | |
| **8.5.0.01** | |
| Web Client | |
| | **Mail Merge**<br>The changes to Mail Merge resulted in deprecating the following mail merge features:<br>▪ Address labels are now only available through reports, not from the Literature Requests list view Literature tasks or as a part of mail merge.<br>▪ 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.<br>▪ Email mail merge templates managed in the Web Client do not support special fields including SQL values, tables, or images.<br>▪ Output to Fax is no longer supported in either the Web Client or Microsoft Word add-in.<br>▪ 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.<br>▪ 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.<br>▪ "One-off" mail merges to Letter or Email are now handled as part of the standard mail merge process.<br>▪ The Notes/History option, Send to Word, has been removed and may be replaced in a future release. |

| Application | Feature |
|---|---|
| | |
| | ■ Literature Requests with a cover letter will only be available as output to File, output to Email is no longer supported.<br>■ Specifying base templates for contact and lead email, fax, or letter templates are no longer supported and those user options have been removed.<br>■ 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. |
| Application Architect | |
| | ■ Importing from another project.<br>■ Creating a project backup<br>■ You can only restore from the Infor CRM SLX provided back up from version 8.4.0 or 8.5.0.<br>■ Creating a manifest by project differences |

For a list of issues fixed since v8.5 see the Resolved Issues chapter.

# Chapter 2
# Applying the Update

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This Web Update affects the following portals:

- Process Host
- SData
- SlxClient (Web Client)
- Offline Web Client
- Infor CRM Customer Portal
- Infor CRM Job Service

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

- Administrative Tools and Servers
- Application Architect
- Remote Office
- Web Host

Install the VFS bundles using the Application Architect, and then build and deploy your Web site(s).

## Installing the update

**To begin the install**

1. Close all Infor CRM SLX applications on the computer to which you are applying the Update.
2. Stop all Infor CRM SLX services on the computer to which you are applying the Update in the following order:
   - Saleslogix Cache Server
   - Saleslogix DBEventing
   - Saleslogix Job Service
   - Saleslogix Messaging Server
   - Saleslogix SData Synchronization Server
   - Saleslogix SpeedSearch
   - Saleslogix Synchronization Service
   - Saleslogix Server
   - Saleslogix System Service
3. Extract the contents of the **Infor_CRM_SLX_v850_Web_Update_01.zip** file to a temporary folder.
4. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_SLX_v850_Web_Update_01.exe**.

5. On the **Infor CRM v8.5.0 Web Update 01** screen do the following:
   - Select the **Install the Infor CRM Update** option.
     The Update files, including the VFS bundle, are extracted to a temporary folder and are removed once the installation is complete.
6. Click **Next**.
7. On the **Welcome** screen, click **Install** to install the patch.
8. If prompted to reboot, click **OK** to allow the reboot.
9. On the **Completed** screen, click **Finished**.

# Renaming the Custom Folder for an LFS implementation with customizations

Due to a change in the name of the customizations folder, implementations who use the Local File System (LFS) and have customizations, must change the name of the Custom folder to SLXCoreCustom after applying the files from Infor_CRM_SLX_v850_Web_Update_01.

In previous releases, when creating a local file system (LFS), two folders were created, "Model" and "Custom". Going forward, the "Custom" folder will now be "SLXCoreCustom".

Your working folder path should not include a folder named "Model". The folder name "Model" is reserved for Infor CRM SLX use only.

**To change the Custom folder name**

1. In Windows Explorer browse to the LFS (Local File System) Working Path.
   You can find this path in Application Architect by going to **Tools** | **Project Workspace Manager**, and then in the **Project Workspace**, look at the **Working Path**
2. Find the **Custom** folder at the root of that location, at the same level as the Model folder.
3. Rename the **Custom** folder to **SLXCoreCustom**.

# Configuring Database Connections for Application Architect

A data link stores information about how the client will log on to the Infor CRM Server. A data link will configure the Provider for a specific server with a database connection. From this dialog box, you can add, edit, or remove a data link. If this is the first time you are connecting to the Infor CRM Server, you will need to add a data link.

Before proceeding, you may need to know the database server name or instance, database name, and the SYSDBA user password.

**To add**

1. Double-click the **AppArchitect.exe**.
2. On the **Please log on...** dialog box, click the **Log on to** ellipsis button.
3. Click the **Add** button.
4. On the **Connection** tab, enter the information needed.
   a. In the **Alias** box, type the name as you want it to appear in the list of available data links. For example, the database name.

   b. Click the Provider drop-down arrow and select one of the following:
      - **System.Data.SqlClient**t: Select if a SQL database
        - In the **Server Name** box type the name of the SQL server where the database resides.
        - In the **User Name** box, type **sysdba**.
        - In the **Password** box, type the sysdba password.
        - Click the **Database** drop-down arrow and select the database you want to connect.
      - **Oracle.ManagedDataAccess.Client**: Select if an Oracle database
        - In the **Service Name** box type the name of the Oracle instance.
        - In the **User Name** box, type **sysdba**.
        - In the **Password** box, type the sysdba password.
        - The **Database** box is not needed for Oracle.
5. Click **Test Connection**. If the connection tested successfully, click **OK**.
   If you cannot connect to the database, verify that the settings are correct (passwords are case-sensitive). The database platform service must also be running on your Database Server.
6. Click the **Advanced** tab and complete the Advanced tab information.
   For steps see the DataLink Manager help topic "Advanced Tab".
7. Click **OK** on the **Data Link Manager** dialog box to complete the new connection.

**To edit**

1. If you want to edit an existing data link, select the data link from the list, and then click the **Edit** button.
2. On the **Connection** tab, edit the information you want to change.
3. Click **Test Connection**.
4. If the connection tested successfully, click **OK**.
   If you cannot connect to the database, verify that the settings are correct (passwords are case-sensitive). The database platform service must also be running on your Database Server.
5. Click the **Advanced** tab and edit the Advanced tab information you want to change.
6. Click **OK** on the **Data Link Manager** dialog box to complete the new connection.

**To delete**

1. In the **Data Link Manager** dialog box, select the data link you want to remove.
2. Click **Delete**, and then click **OK**.

# Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

**To install VFS bundles**

1. Navigate to the bundle installation folder where the bundle was extracted when Applying the Update.
2. Ensure the bundle is not blocked.
   a. Right-click the bundle file and click **Properties**.
   b. On the **General** tab, if there is an **Unblock** button, click it to unblock the file.
      The Unblock button only displays if the file is locked.
   c. Click **Apply**.
   d. Click **OK**.
3. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.

4. Open the **Application Architect**.
5. On the **View** menu, click **Bundle Manager**.
6. Click **Install**.
7. Select **File name** and navigate to the temporary folder you extracted the **Infor_CRM_SLX_v850_Web_Update_01.zip**, click **ICRM SLX v8.5.0.01 Web VFS.zip**, and then click **Open**.
8. On the **Select Bundle** screen, click **Next**.
9. Click **Finish**.
10. Rebuild the database schema.
    - On the **Tools** menu, click **Rebuild Database Schema**.
11. Install the ICRM SLX v8.5.0.01 Web Actions bundle.
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name** and navigate to the temporary folder you extracted the **Infor_CRM_SLX_v850_Web_Update_01.zip**, click **ICRM SLX v8.5.0.01 Web Actions.zip**, and then click **Open**.
    d. On the **Select Action**s screen, click **Next**.
    e. On the **Release Plugins** dialog box, click **OK** to release the plugins to Everyone.
    f. Click **Finish**.

# Running the Conversion Utility

Once the conversion utility is run, these actions cannot be reversed.

The conversion utility assigns a DataKey value to each custom setting based on the existing Description. This key value should never be changed.

The Conversion Utility also contains these options:

- **Master Data Consolidation**
  This option is only for implementations with Back Office. This is a non-reversible option that consolidates existing account records with the same CustomerID into a single account record. This option also moves all related information, such as activities, history, attachments, quotes, sales orders, invoices, shipments, returns and receivables to the new consolidated account.
- **Isolate integrated content by Logical ID**

  This option is only for rare implementations based on two or more host ERP systems with data defined using a common ERP Accounting Entity. For most implementations this option should not be selected.

  This is a non-reversible option that extends the internal format of the Infor CRM SLX tracking of unique ID values assigned by the host ERP system to include an internal BackOfficeID value
- **Update Favorite Groups**
  This option sets the new groups that are provided as Favorites so that they display by default in the list and detail views.
- **Convert Calculated Fields**
  Creates existing calculated fields as a computed column in the specified base table. Each calculated field also remains as a row in the CalculatedFieldData table.

**To run**

1. On the Administrative Workstation, browse to the ConversionUtility.config file.
   By default, this is in \Program Files (x86)\Saleslogix.
2. Open **ConversionUtility_8.5.0.x.exe.config** with the text editor of your choice.

3. Scroll to the <connectionStrings> section and change the **Initial Catalog** value to your Connection Manager name.
   For example:
   Change the value from: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=SALESLOGIX;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>

   Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabase;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>
4. Save your changes.
5. Double click the **ConversionUtility_8.5.0.x.exe** application.
6. In the Conversion Utility interface, clear any actions you do not want to run and click **Update**.

# Building and deploying the Web changes

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

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

**To build and deploy**

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

- By default, the Infor CRM SLX Web Client portal is set to deploy to the localhost, but you can change these settings to fit your environment.
- Changes will not be visible to the Offline Web Client and/or Web remote Office until after the next Sync cycle.

7. Repeat steps 1-6 for each of the affected portals.
8. Restart all services that you stopped prior to "Installing the update" on page 7

# Running Trigger script (SQL)

For SQL implementations, you must run the ConvertLeadTriggerUpdate.sql script.

**To run the .sql script**

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 **ConvertLeadTriggerUpdate.sql**.
   The script is located in the Infor_CRM_SLX_v850_Web_Update_01.zip
4. **In the Query dialog box:**
   a. In the **DB** box, select your database.
   b. Click **Execute Query** (the green arrow) to start the script.
5. Exit the **Query** dialog box and the **SQL Server Management Studio**.

# 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.

**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 Database**s 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.

# Infor CRM Back Office Extension (ICBOE) installations

If your installation includes Infor CRM Back Office Extension, you must upgrade the BOD Pack for your ERP system to version 8.5.0.01. For more information, and to download the BOD Packs, see KB 2237938, available from Infor Concierge at https://concierge.infor.com/.

#### To access the Knowledge Base

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

## Normalizing Base Currency

To normalize base currency values see the Web Client topic "Normalizing records using the Bulk Update option" for steps to normalize records.

# Infor CRM ION Workflow

If your installation includes Infor CRM ION Workflow, you must upload additional files to ION Desk and Infor Ming.le. For more information, and to download the files, see KB 1974772 available from Infor Concierge at https://concierge.infor.com/.

# Using the Infor CRM SLX Mail Merge for Microsoft Word add-in

When the Infor CRM Mail Merge for Microsoft Word add-in is installed, you can create, edit, or manage Infor CRM mail merge Word templates and perform mail merges from the Mailings tab.

For more information see the Web Client Help topic "Using Mail Merge"

# Installing the Infor CRM SLX Mail Merge for Microsoft Word add-in

Provide the following instructions to all Web Client users who will use the Infor CRM SLX Mail Merge for Microsoft Word add-in.

If a previous version of the Infor CRM SLX Mail Merge for Microsoft Word add-in is installed, you must first uninstall that version before installing a new version

**To install the Microsoft Word add-in**

1. Close Microsoft Word.
2. Sign in to the Infor CRM SLX Web Client.
3. On the **Tools** menu, click **Options**.
4. Click the **General** tab.
5. Click Install Mail Merge for Microsoft Word.
6. Click **Install**.
7. If prompted, click **Yes** to confirm that you want to install the add-in.
8. Click **Close**.
9. Open Microsoft Word.
10. If prompted, "Are you sure you want to install this customization?”, click **Install**.
11. Once installed, you must set Infor CRM Database Connection Options.

    These options may already be configured for users who set these options for Infor CRM Xbar for Microsoft Outlook.

    a. On the Microsoft Word **Mailings** tab, click the **Infor CRM SLX Options** button and, if necessary, click **Connection**.

    b. In the **SData URL** field, specify the server name and SData portal.

    - Specify the URL that your administrator provided in order to connect to Infor CRM. Use the following format: http://servername:port/sdata or https://servername:port/sdata
    - Offline Web Client users - Specify the URL to connect to your local Infor CRM server. Use the following format:
      http://localhost:port/sdata The port is usually 8088.

    c. If your implementation does not use the standard SlxClient portal for the Web Client, then in the Web Client URL field, specify the server name and Web Client portal.

    This is automatically completed for you if your implementation uses the standard SlxClient portal, and no changes are needed.

    - Specify the URL that your administrator provided in order to connect to the Infor CRM Web Client. Use the following format: http://servername:port/<portal name> or https://servername:port/<portal name>
    - Offline Web Client users - Specify the URL to connect to your local Infor CRM Web Client Use the following format: http://localhost:port/<portal name> The port is usually 8088.

    d. If you use your Windows account information to log in to Infor CRM, select the **Use Windows Authentication** option, otherwise leave this option cleared.

e. Specify the **User Name** and **Password** you use to sign in to Infor CRM.
This may be your Infor CRM or Windows user name and password.

> If your implementation uses Ming.le, you will not enter your credentials in this dialog box. You will be prompted to enter your Ming.le credentials.

f. Click **Test**.

If the test fails, review your connection information. If the information is correct and you still cannot connect, contact the administrator.

g. Click **OK** when you are finished setting your options and your connection test is successful.

# Converting Legacy Mail Merge Word Templates

> Only the system administrator can perform these steps.

To use Mail Merge in Microsoft Word, any templates created in Infor CRM prior to installing the Infor CRM Mail Merge for Microsoft Word add-in must be converted to .docx files.

Legacy mail merge Word templates can only be converted in Microsoft Word after installing the Infor CRM Mail Merge for Microsoft Word add-in.

**To convert a template**

1. In Microsoft Word, on the **Mailings** tab, click **Manage Templates**.
2. If none of the templates have been converted, a message box displays “There are no mail merge templates available.” Click **OK** to close the dialog box.
3. In the **Manage Templates** toolbar, click **Convert**.
A message box displays with the number of legacy (DOC) mail merge templates.
4. In the message box, click **Yes**.
5. When the conversion is finished, click **OK** to close the **Convert Mail Merge Templates** dialog box.

> If additional templates are created in the Infor CRM Windows Client, Web Client, or Architect, after converting templates, you will need to convert those templates for them to be available for mail merge in Microsoft Word.

# Chapter 3
# Changes in this release

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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_Web_Update_01.zip includes:
  - Infor_CRM_SLX_v850_Web_Update_01.exe
  - ICRM SLX v8.5.0.01 Web VFS.zip
  - ICRM SLX v8.5.0.01 Web Actions.zip
  - ConvertLeadTriggerUpdate.sql

This update may include .pdb files which are not listed in this document. These files are included to provide additional logging information for troubleshooting purposes.

## Infor_CRM_SLX_v850_Web_Update_01.exe

The Infor_CRM_SLX_v850_Web_Update_01.exe patch installs the following files.

### Executables

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

| Flie Name | File Version | 8.5.x |
|---|---|---|
| Admin.exe | 8.5.0.1875 | 01 |
| Application Architect.exe | 8.5.0.1874 | 01 |
| Architect.exe | 8.5.0.1875 | 01 |
| Bundler.exe | 8.5.0.1874 | 01 |
| ConversionUtility_8.5.0.x.exe | 8.5.0.1874 | 01 |
| DeploymentUtility.exe | 8.5.0.1874 | 01 |
| InforCRMWordAddinSetup.exe | 8.5.0.1 | 01 |
| RebuildDataBaseSchema.exe | 1.0.0.0 | 01 |
| WebProvision.exe | 8.5.0.1874 | 01 |

## Help and Documentation files

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

| Flie Name | 8.5.x |
|---|---|
| Admin.chm | 01 |
| ApplicationArchitect.chm | 01 |
| Architect.chm | 01 |
| DataLinkManager.chm | 01 |
| SLX Connection Manager.chm | 01 |
| SLXOLEDBProvider.chm | 01 |

# ICRM SLX v8.5.0.01 Web VFS

This bundle contains the following:

## Entities and Properties

The following lists entities and properties added or updated since v8.5.

| Entity | Property | Description | 8.5.x |
|---|---|---|---|
| Account | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| Address | PostalCode | IsWorkflow attribute set to True | 01 |
| BackOffice | HostBackOfficeId (string 12) | Added as foreign key reference to the BackOffice record | 01 |
| BackOffice | SubscriberApp (Boolean) | Added to indicate if the BackOffice is a subscriber application | 01 |
| BodFieldMapping | IsValueOverride (Boolean) | Added as indicator for BOD processing that if a value is missing from BOD content if any respective value in CRM should be cleared | 01 |
| Contact | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| EmailTemplate | | Stores Mail Merge email template information | 01 |
| EmailTemplate | CreateDate (DateTime) | Identifies when the record was created | 01 |
| EmailTemplate | CreateUser (String12) | Identifies the user who created the record. | 01 |
| EmailTemplate | Description (String 1024) | Description of the template | 01 |
| EmailTemplate | EmailTemplateId (String 12) | Unique ID for the template. | 01 |
| EmailTemplate | EntityType (String 64) | The template entity | 01 |
| EmailTemplate | ModifyDate (DateTime) | Identifies when the record was created | 01 |
| EmailTemplate | ModifyUser (String12) | Identifies the user who created the record. | 01 |
| EmailTemplate | Name (String 256) | Name of the template | 01 |
| EmailTemplate | SecCodeId (String 12) | Security ID of the template owner | 01 |
| EmailTemplate | TemplateHTML (Memo) | Rendered HTML from the quill editor | 01 |

| Entity | Property | Description | 8.5.x |
|---|---|---|---|
| EmailTemplate | TemplateJSON (Memo) | JSON markup used by the quill editor | 01 |
| EmailTemplateProperty | DataType (String 64) | Data type of the property, such as Text, Integer, etc. | 01 |
| EmailTemplateProperty | Description (String 255) | Property description (not used) | 01 |
| EmailTemplateProperty | DisplayFormat (String 64) | Formatting for the data type, such as Text, Integer, etc. | 01 |
| EmailTemplateProperty | DisplayName (String 128) | The property's display name | 01 |
| EmailTemplateProperty | EmailTemplateId (String 12) | Foreign key reference to the email template record | 01 |
| EmailTemplate | EmailTemplateId (String12) | Unique ID for the template. | 01 |
| EmailTemplateProperty | EntityPath (String 128) | Path from the main entity to the child entity | 01 |
| EmailTemplateProperty | IsActive (Boolean) | Show/hide the property from the editor | 01 |
| EmailTemplateProperty | PicklistName (String 64) | Name of the picklist, if the property is a picklist type | 01 |
| EmailTemplateProperty | SecCodeId (String 12) | Security ID of the template property owner | 01 |
| EmailTemplateProperty | Token (String 128) | Token used by the editor to trigger auto-complete | 01 |
| ERPBillTo | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPInvoice | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPPayFrom | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPPerson | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPReceivable | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPShipment | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| ERPShipTo | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| History | EmailUniqueId (Int) | Added to track the processing of email messages (Gmail) | 01 |
| IONWorkflowDefinition | TriggerOnInsert (Boolean) | When selected triggers the workflow when a new record of the specified entity type is created. If a trigger condition is also set, both criteria must be met to trigger the workflow. | 01 |
| IONWorkflowDefinition | TriggerOnUpdate (Boolean) | When selected triggers the workflow when a record of the specified entity type is updated. If a trigger condition is also set, both criteria must be met to trigger the workflow. | 01 |
| LeadAddress | Address1 | Is Workflow attribute set to True | 01 |
| LeadAddress | Address2 | Is Workflow attribute set to True | 01 |

| Entity | Property | Description | 8.5.x |
|---|---|---|---|
| LeadAddress | Address3 | Is Workflow attribute set to True | 01 |
| LeadAddress | Address4 | Is Workflow attribute set to True | 01 |
| LeadAddress | Address5 | Is Workflow attribute set to True | 01 |
| LeadAddress | Address6 | Is Workflow attribute set to True | 01 |
| LeadAddress | City | Is Workflow attribute set to True | 01 |
| LeadAddress | Country | Is Workflow attribute set to True | 01 |
| LeadAddress | CountryCode | Is Workflow attribute set to True | 01 |
| LeadAddress | County | Is Workflow attribute set to True | 01 |
| LeadAddress | Description | Is Workflow attribute set to True | 01 |
| LeadAddress | PostalCode | Is Workflow attribute set to True | 01 |
| LeadAddress | Routing | Is Workflow attribute set to True | 01 |
| LeadAddress | Salutation | Is Workflow attribute set to True | 01 |
| LeadAddress | State | Is Workflow attribute set to True | 01 |
| LeadAddress | TimeZone | Is Workflow attribute set to True | 01 |
| Product | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| Quote | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| Quote | BillToName | Is Workflow attribute set to True | 01 |
| Quote | ShipToName | Is Workflow attribute set to True | 01 |
| QuoteAddress | | Is Workflow attribute set to True for the entity | 01 |
| QuoteAddress | Address1 | Is Workflow attribute set to True | 01 |
| QuoteAddress | Address2 | Is Workflow attribute set to True | 01 |
| QuoteAddress | Address3 | Is Workflow attribute set to True | 01 |
| QuoteAddress | Address4 | Is Workflow attribute set to True | 01 |
| QuoteAddress | Address5 | Is Workflow attribute set to True | 01 |
| QuoteAddress | Address6 | Is Workflow attribute set to True | 01 |
| QuoteAddress | City | Is Workflow attribute set to True | 01 |
| QuoteAddress | Country | Is Workflow attribute set to True | 01 |
| QuoteAddress | CountryCode | Is Workflow attribute set to True | 01 |
| QuoteAddress | County | Is Workflow attribute set to True | 01 |

| Entity | Property | Description | 8.5.x |
|---|---|---|---|
| QuoteAddress | Description | Is Workflow attribute set to True | 01 |
| QuoteAddress | PostalCode | Is Workflow attribute set to True | 01 |
| QuoteAddress | Routing | Is Workflow attribute set to True | 01 |
| QuoteAddress | Salutation | Is Workflow attribute set to True | 01 |
| QuoteAddress | State | Is Workflow attribute set to True | 01 |
| QuoteAddress | TimeZone | Is Workflow attribute set to True | 01 |
| Return | | Is Workflow attribute set to True for the entity | 01 |
| Return | AssignedDate | Is Workflow attribute set to True | 01 |
| Return | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| Return | BaseCurrencyCode | Is Workflow attribute set to True | 01 |
| Return | CurrencyCode | Is Workflow attribute set to True | 01 |
| Return | CustomerPO | Is Workflow attribute set to True | 01 |
| Return | ExpectedDate | Is Workflow attribute set to True | 01 |
| Return | Notes | Is Workflow attribute set to True | 01 |
| Return | PhoneNumber | Is Workflow attribute set to True | 01 |
| Return | PromisedReturnDate | Is Workflow attribute set to True | 01 |
| Return | Reason | Is Workflow attribute set to True | 01 |
| Return | RequiredRetunDate | Is Workflow attribute set to True | 01 |
| Return | ReturnDate | Is Workflow attribute set to True | 01 |
| Return | ReturnNumber | Is Workflow attribute set to True | 01 |
| Return | ShortNotes | Is Workflow attribute set to True | 01 |
| SalesOrder | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |
| SLXLocation | BackOfficeId (String 12) | Added as foreign key reference to the BackOffice record | 01 |

## Relationships

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

| Parent | Relationship | Child | 8.5.x |
|---|---|---|---|
| Account.AccountAccountingEntities | 1:M | Account Accounting Entity.Account | 01 |
| Account.ErpAccountPersons | 1:M | Account Person.Account | 01 |
| Account.ErpBillToAccounts | 1:M | Bill To Account.Account | 01 |
| Account.ErpContactAccounts | 1:M | Contact Account.Account | 01 |
| Account.ErpInvoices | 1:M | Invoice.Account | 01 |
| Account.ErpReceivables | 1:M | Receivable.Account | 01 |
| Account.ErpShipments | 1:M | Shipment.Account | 01 |
| Account.ErpShipToAccounts | 1:M | Ship To Account.Account | 01 |
| Account.Quotes. | 1:M | Quote.Account | 01 |
| Account.SIRecommendations | 1:M | SI Recommendation.Account | 01 |
| Back Office.Accounts | 1:M | Account.BackOffice | 01 |
| Back Office.BackOfficeAccountingEntities | 1:M | Back Office Accounting Entity.BackOffice | 01 |
| Back Office.Contacts | 1:M | Contact.BackOffice | 01 |
| Back Office.ERPBillToes | 1:M | Bill To.BackOffice | 01 |
| Back Office.ERPInvoices | 1:M | Invoice.BackOffice | 01 |
| Back Office.ERPPayFroms | 1:M | Pay From.BackOffice | 01 |
| Back Office.ERPPersons | 1:M | Person.BackOffice | 01 |
| Back Office.ERPReceivables | 1:M | Receivable.BackOffice | 01 |
| Back Office.ERPShipments | 1:M | Shipment.BackOffice | 01 |
| Back Office.ERPShipToes | 1:M | Ship To.BackOffice | 01 |
| Back Office.Products | 1:M | Product.BackOffice | 01 |
| Back Office.Quotes | 1:M | Quote.BackOffice | 01 |
| Back Office.Returns | 1:M | Return.BackOffice | 01 |
| Back Office.SalesOrders | 1:M | Sales Order.BackOffice | 01 |
| Back Office.SlxLocations | 1:M | Location.BackOffice | 01 |
| Bill To.Addresses | 1:M | Address | 01 |

| Parent | Relationship | Child | 8.5.x |
|---|---|---|---|
| Bill To.ERPBillToAccountingEntities | 1:M | Bill To Accounting Entity.Bill To | 01 |
| Bill To.ErpBillToShipTos | 1:M | Bill To Ship To.ErpBillTo | 01 |
| Bill To.ErpPayFromBillTos | 1:M | Pay From Bill To. ERPBillTo | 01 |
| Contact.Address | M:1 | Address | 01 |
| Contact.ErpContactAccounts | 1:M | Contact Account.Contact | 01 |
| Contact.ShippingAddress | M:1 | Address | 01 |
| CRM Workflow.ActiveStepInstance | M:1 | Workflow Step Instance | 01 |
| CRM Workflow.WorkflowStepInstances | 1:M | Workflow Step Instance.WorkflowInstance | 01 |
| Email Template.EmailTemplateProperties | 1:M | Email Template Property.EmailTemplate | 01 |
| Invoice.DiscountChargeItems | 1:M | Discount Charge Item.Invoice | 01 |
| Invoice.ErpInvoiceAddresses | 1:M | Invoice Address.ErpInvoice | 01 |
| Invoice.ErpInvoiceItems | 1:M | Invoice Item.ErpInvoice | 01 |
| Invoice.ErpInvoicePersons | 1:M | Invoice Person.ErpInvoice | 01 |
| ION Workflow.WorkflowInstances | 1:M | CRM Workflow.IONWorkflow | 01 |
| Lead.Address | M:1 | Lead Address | 01 |
| Pick List.PicklistAliases | 1:M | Pick List Alias.PickList | 01 |
| Quote Item.DiscountChargeItems | 1:M | Discount Charge Item.Quote | 01 |
| Quote Item.QuoteSubItems | 1:M | Quote Sub Item.QuoteItem | 01 |
| Quote.BillingAddress | M:1 | Quote Address | 01 |
| Quote.DiscountChargeItems | 1:M | Discount Charge Item.Quote | 01 |
| Receivable.DiscountChargeItems | 1:M | Discount Charge Item.Receivable | 01 |
| Receivable.ErpReceivableAddresses | 1:M | Receivable Address.ErpReceivable | 01 |
| Receivable.ErpReceivableItems | 1:M | Receivable Item. ErpReceivable | 01 |
| Return.DefectReturns | 1:M | Defect Return.Return | 01 |
| Return.ErpBillingAddress | M:1 | Return Address | 01 |
| Return.ErpReturnProducts | 1:M | Return Product.Return | 01 |
| Return.ErpShippingAddress | M:1 | Return Address | 01 |
| Return.ReturnAddresses | 1:M | Return Address.Return | 01 |

| Parent | Relationship | Child | 8.5.x |
|---|---|---|---|
| Return.ReturnReceivedAddress | M:1 | Return Address | 01 |
| Return.ReturnReceivedProducts | 1:M | Return Received Product.Return | 01 |
| Return.ReturnShippedAddress | M:1 | Return Address | 01 |
| Return.ReturnShippedProducts | 1:M | Return Shipped Product.Return | 01 |
| Sales Order Item.ErpSubItems | 1:M | Sales Order Item Sub Item.SalesOrderItem | 01 |
| Sales Order Item.SOItemDistributedCharges | 1:M | Discount Charge Item.SOItemDistributedCharge | 01 |
| Sales Order Item.SOItemDistributedTaxes | 1:M | Discount Charge Item.SOItemDistributedTax | 01 |
| Sales Order.ErpInvoiceItems | 1:M | Invoice Item.SalesOrder | 01 |
| Sales Order.ErpShipmentItems | 1:M | Shipment Item.SalesOrder | 01 |
| Ship To.Addresses | 1:M | Address | 01 |
| Ship To.ErpBillToShipTos | 1:M | Bill To Ship To.ErpShipTo | 01 |
| Shipment.DiscountChargeItems | 1:M | Discount Charge Item.Shipment | 01 |
| Shipment.ErpShipmentAddresses | 1:M | Shipment Address.ErpShipment | 01 |
| Shipment.ErpShipmentItems | 1:M | Shipment Item.ErpShipment | 01 |
| ShipTo.ERPShipToAccountingEntities. | 1:M | Ship To Accounting Entity.ShipTo | 01 |
| Workflow Definition.AuditHistory | 1:M | History.IONWorkflowDefinition | 01 |
| Workflow Definition.IONWorkflows | 1:M | ION Workflow.IONWorkflowDefinitions | 01 |
| Workflow Definition.WorkflowProperties | 1:M | Workflow Property.IONWorkflowDefinition | 01 |
| Workflow Definition.WorkflowSteps | 1:M | Workflow Step.IONWorkflowDefinition | 01 |
| Workflow Definiton.IONWorkflowMappings | 1:M | ION Workflow Mapping.IONWorkflowDefinition | 01 |
| Workflow Step Instance.WorkflowStepReviewerInstances | 1:M | Workflow Step Reviewer Instance.WorkflowStepInstance | 01 |

## New or Updated Views

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

| Views | Description | 8.5.x |
|---|---|---|
| EmailTemplatePropertyView | Combines the EmailTemplate and EmailTemplateProperty tables | 01 |

## Filters

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

| Package | Entity | Filter | 8.5.x |
|---|---|---|---|
| Saleslogix Application Entities | EmailTemplate | CreateUser | 01 |
| Saleslogix Application Entities | EmailTemplate | EntityType | 01 |
| Saleslogix Application Entities | Lead | City | 01 |
| Saleslogix Application Entities | Lead | State | 01 |

## Business Rules

The following lists business rules added or updated since v8.5.

| Package | Entity | Business Rule | 8.5.x |
|---|---|---|---|
| Saleslogix Application Entities | AreaCategoryIssue | GetDistinctAreaCategories | 01 |
| Saleslogix Application Entities | AreaCategoryIssue | GetDistinctAreaCategoryIssues | 01 |
| Saleslogix Application Entities | AreaCategoryIssue | GetDistinctAreas | 01 |
| Saleslogix Application Entities | EmailTemplate | CopyTemplate | 01 |
| Saleslogix Application Entities | EmailTemplate | GetApprovalTokens | 01 |
| Saleslogix Application Entities | EmailTemplate | GetSubjectTokens | 01 |
| Saleslogix Application Entities | EmailTemplate | GetTemplateTokens | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | GetApprovalTokens | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | GetNotificationTokens | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | GetSubjectTokens | 01 |

| Package | Entity | Business Rule | 8.5.x |
|---|---|---|---|
| Saleslogix Application Entities | Lead | CanChangeMarketoOwner | 01 |
| Saleslogix Application Entities | Opportunity | GetDefaultOpportunityDescription | 01 |

## Forms

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

| Package | Entity | Form Name | 8.5.x |
|---|---|---|---|
| Saleslogix Application Entities | Account | AccountDetails | 01 |
| Saleslogix Application Entities | Account | AccountExtendedDetails | 01 |
| Saleslogix Application Entities | Account | ErpBillTos | 01 |
| Saleslogix Application Entities | Account | ErpShipTos | 01 |
| Saleslogix Application Entities | BackOffice | BackOfficeDetails | 01 |
| Saleslogix Application Entities | BackOffice | InsertBackOffice | 01 |
| Saleslogix Application Entities | BODFieldMapping | AddEditBODFieldMapping | 01 |
| Saleslogix Application Entities | BODFieldMapping | FieldMappingDetail | 01 |
| Saleslogix Application Entities | BODMapping | InsertBODMapping | 01 |
| Saleslogix Application Entities | Campaign | CampaignDetails | 01 |
| Saleslogix Application Entities | Contract | ContractComments | 01 |
| Saleslogix Application Entities | CustomSetting | AddEditOBMCustomSettings | 01 |
| Saleslogix Application Entities | EmailTemplate | EmailTemplateDetails | 01 |
| Saleslogix Application Entities | EmailTemplate | EmailTemplateProperties | 01 |
| Saleslogix Application Entities | EmailTemplate | InsertEmailTemplate | 01 |
| Saleslogix Application Entities | ERPBillTo | ErpBillToDetails | 01 |
| Saleslogix Application Entities | Integration | IntegrationIONWorkFlows | 01 |
| Saleslogix Application Entities | Integration | IntegrationOBMCustomSettings | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | InsertIONWorkflowDefinition | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | IONWorkflowDetails | 01 |
| Saleslogix Application Entities | IONWorkflowDefinition | IONWorkflowFieldMappings | 01 |

| Package | Entity | Form Name | 8.5.x |
|---|---|---|---|
| Saleslogix Application Entities | Lead | LeadDetails | 01 |
| Saleslogix Application Entities | PicklistAlias | AddEditPicklistAlias | 01 |
| Saleslogix Application Entities | Product | ProductCPQDetails | 01 |
| Saleslogix Application Entities | Product | ProductErpDetails | 01 |
| Saleslogix Application Entities | Return | ReturnComments | 01 |
| Saleslogix Application Entities | SalesOrder | SalesOrderShipTo | 01 |
| Saleslogix Application Entities | WorkflowStep | AddEditCRMWorkflowStep | 01 |
| Saleslogix Application Entities | WorkflowStepReviewerInstance | WorkflowStepApprovers | 01 |
| SLXSecuritySupport | OfficeProfile | EmailSetup | 01 |
| SLXSecuritySupport | Team | TeamMembers | 01 |

## Quick Forms

The following lists new or updated quick forms added since v8.5

| Form Name | 8.5.x |
|---|---|
| QFSDataGrid (Control Rendering Template) | 01 |
| QFSDataGrid (Script Rendering Template) | 01 |
| QFSLXSDataLookup (Control Rendering Template) | 01 |

## Custom Pages and related Code Snippets (.ascx, .aspx)

The following lists custom pages added or updated since v8.5 and related support files such as code snippets(.cs) and resource files (.resx).

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|App_LocalResources | ActivexInfo.aspx.resx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Association | AddEditAccountAssociation.ascx | 01 |
| SlxClient | SupportFiles | ChangePassword.aspx | 01 |
| Infor CRM Customer Portal | SupportFiles\|SmartParts\|TaskPane \|CommonTasks\| | CommonTasksTasklet.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|TaskPane \|CommonTasks\| | CommonTasksTasklet.ascx.cs | 01 |
| Infor CRM Customer Portal | SupportFiles | ForgotMyPassWord.aspx | 01 |
| SlxClient | SupportFiles | ForgotMyPassWord.aspx | 01 |
| Infor CRM Customer Portal | SupportFiles | ForgotMyUserName.aspx | 01 |
| SlxClient | SupportFiles | ForgotMyUserName.aspx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Options | GeneralSearchOptions.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Options\|App_LocalResources | GeneralSearchOptions.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|Options | GeneralSearchOptions.ascx.resx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Lead | LeadSearchAndConvert.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|TaskPane\|LiteratureManagement | LiteratureManagementTasks.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|TaskPane\|LiteratureManagement | LiteratureManagementTasks.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|TaskPane\|LiteratureManagement\|App_ LocalResources | LiteratureManagementTasks.ascx.resx | 01 |
| Infor CRM Customer Portal | SupportFiles | Login.aspx | 01 |
| SlxClient | SupportFiles | Login.aspx | 01 |
| Infor CRM Customer Portal | SupportFiles\|App_LocalResources | Login.aspx.resx | 01 |
| SlxClient | SupportFiles\|App_LocalResources | Login.aspx.resx | 01 |
| Infor CRM Customer Portal | SupportFiles | Logoff.aspx | 01 |
| SlxClient | SupportFiles | Logoff.aspx | 01 |
| Infor CRM Customer Portal | SupportFiles\|App_LocalResources | Logoff.aspx.resx | 01 |
| SlxClient | SupportFiles\|App_LocalResources | Logoff.aspx.resx | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|SmartParts\|Campaign | ManageTargets.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Campaign | ManageTargets.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|MergeRecords | MergeChildren.ascx.resx | 01 |
| SlxClient | SupportFiles\|SmartParts\|MergeRecords\|App_LocalResources | MergeRecords.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|WhatsNew | NotesWhatsNew.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|OpportunitySalesProcess | OpportunitySalesProcess.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|\|OpportunitySalesProcess | OpportunitySalesProcess.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|OfficeProfile | PasswordOptions.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|PickList | PicklistAliases.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|PickList\|App_LocalResources | PicklistAliases.ascx.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|SmartParts\|GroupBuilder | QueryBuilderMain.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|GroupBuilder | QueryBuilderMain.ascx | 01 |
| Infor CRM Customer Portal | SupportFiles | ResetMyPassword.aspx | 01 |
| SlxClient | SupportFiles | ResetMyPassword.aspx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Activity | ScheduleCompleteActivity.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|Activity\|App_LocalResources | ScheduleCompleteActivity.ascx.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|SmartParts\|SpeedSearch | SpeedSearch.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|SpeedSearch | SpeedSearch.ascx | 01 |
| Infor CRM Customer Portal | SupportFiles\|SmartParts\|SpeedSearch | SpeedSearch.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|SpeedSearch | SpeedSearch.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|User | UserClientSystem.ascx | 01 |
| SlxClient | SupportFiles\|SmartParts\|User | UserClientSystem.ascx.cs | 01 |
| SlxClient | SupportFiles\|SmartParts\|User\|App_LocalResources | UserClientSystem.ascx.resx | 01 |
| SlxClient | SupportFiles | WinAuthLoad.aspx | 01 |

## Master Pages

The following lists master pages added or updated since v8.5 and related support files such as resource files (.resx) files.

| Portal | Location | Flie Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|Master | activity.master | 01 |
| SlxClient | SupportFiles\|Master | admin.master | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters | base.master | 01 |
| SlxClient | SupportFiles\|Masters | base.master | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters | core.master | 01 |
| SlxClient | SupportFiles\|Masters | core.master | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters | Default.master | 01 |
| SlxClient | SupportFiles\|Masters | Default.master | 01 |
| SlxClient | SupportFiles\|Masters\|App_LocalResources | Dialog.master.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters | Help.master | 01 |
| SlxClient | SupportFiles\|Masters | Help.master | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters\|App_LocalResources | Help.master.resx | 01 |
| SlxClient | SupportFiles\|Masters\|App_LocalResources | Help.master.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters | Login.master | 01 |
| SlxClient | SupportFiles\|Masters | Login.master | 01 |
| Infor CRM Customer Portal | SupportFiles\|Masters\|App_LocalResources | Login.master.resx | 01 |
| SlxClient | SupportFiles\|Masters\|App_LocalResources | Login.master.resx | 01 |
| SlxClient | SupportFiles\|Masters | report.master | 01 |
| SlxClient | SupportFiles\|Masters\|App_LocalResources | smartpasrtdashboard.master.resx | 01 |

## Configuration Files

The following lists configuration files added or updated since v8.5.

| Portal | Location | Filename | Description | 8.5.x |
|---|---|---|---|---|
| Infor CRM Customer Portal | SupportFiles | appSettings.config | Added an option to skip logging errors based on the http status code.<br>The new option defaults to 404 (http not found error). | 01 |
| SData Integration Host | SupportFiles | appSettings.config | Added an option to skip logging errors based on the http status code.<br>The new option defaults to 404 (http not found error). | 01 |
| SlxClient | SupportFiles | appSettings.config | Added an option to skip logging errors based on the http status code.<br>The new option defaults to 404 (http not found error). | 01 |

## Mashups

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

| Mashup | Description | 8.5.x |
|---|---|---|
| RemindersAndAlarms | CountRingingAlarms and CountPastDue HQL queries now specify explicit joins to the User_Activity table | 01 |

## HTML

The following lists HTML files added or updated since v8.5.

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr \|templates | ActivityEditor.html | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr \|templates | ActivityEditor.html | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | DateTimePicker.html | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | DateTimePicker.html | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | HelpAboutDialog.html | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | HelpAboutDialog.html | 01 |
| SlxClient | SupportFiles\|dashboard | index.html | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | Name.html | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls\|Templates | Name.html | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract \|templates | PricingAvailabilityWidget.html | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract \|templates | PricingAvailabilityWidget.html | 01 |

## Cascading Style Sheet files

The following lists style sheets added or updated since v8.5.

| Portal | | Flie Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|dashboard\|static\|css | 3.405c93a1.chunk.css | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|css | 3.405c93a1.chunk.css.map | 01 |
| SlxClient | SupportFiles\|css | layout.css | 01 |
| Infor CRM Customer Portal | SupportFiles\|css | layout.css | 01 |
| SlxClient | CSS\|GroupBuilder | main.css | 01 |
| Infor CRM Customer Portal | CSS\|GroupBuilder | main.css | 01 |
| SlxClient | SupportFiles\|css | sage-platform.css | 01 |
| Infor CRM Customer Portal | SupportFiles\|css | sage-platform.css | 01 |
| Infor CRM Customer Portal | SupportFiles\|css | theme.css | 01 |
| SlxClient | SupportFiles\|css | theme.css | 01 |

## Resource files (.resx)

The following lists resource files added or updated since v8.5.

Other .resx files are listed with the pages they reference in the "Custom Pages and related Code Snippets (.ascx, .aspx)" table.

| Portal | Locations | Resource | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|App_GlobalResources | GroupLayout.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|App_GlobalResources | SalesLogix.resx | 01 |
| SlxClient | SupportFiles\|App_GlobalResourcess | SalesLogix.resx | 01 |
| Infor CRM Customer Portal | SupportFiles\|App_GlobalResources | SalesLogixPortal.resx | 01 |
| SlxClient | SupportFilesApp_LocalResources | Widgets.resx | 01 |

## JavaScript files

The following lists JavaScript files added or updated since v8.5.

* File names containing an asterisk indicate that the same file is available for multiple languages.

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | _BaseTaskPaneTasklet.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | _BaseTaskPaneTasklet.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | 2.89975a1d.chunk.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | 2.89975a1d.chunk.js.map | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | 3.7e62cbe4.chunk.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | 3.7e62cbe4.chunk.js.map | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|dashboard\|static\|js | 4.6c28c718.chunk.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | 4.6c28c718.chunk.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Activity-combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Activity-combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Activity-Combined.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Activity-Combined.js.map | 01 |
| SlxClient | SupportFiles\|CSS<br>SupportFiles\|jscript\|Sage\|Utility | Activity.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|CSS<br>SupportFiles\|jscript\|Sage\|Utility | Activity.js | 01 |
| SlcClient | SupportFiles\|CSS<br>SupportFiles\|jscript\|Sage\|Utility | Activity.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Activity_*.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Activity_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls | ActivityAssociationsWidget.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls | ActivityAssociationsWidget.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls | ActivityAssociationsWidget.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls\|en | ActivityEditor.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls\|en | ActivityEditor.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | ActivityList.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | ActivityList.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Admin-Combined.js | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Admin-Combined.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Admin.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Admin_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Admin_*.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Utility\|File | Attachment.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|Utility\|File | Attachment.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Base-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Base-Combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Base-Combined.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Base-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Base.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Base.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Base_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Base_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|ProximitySearch | BingGeocodeModule.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|ProximitySearch | BingGeocodeModule.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|ProximitySearch | BingRouteModule.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|ProximitySearch | BingRouteModule.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|GroupBuilder | calcFields.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|GroupBuilder | calcFields.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | CalendarUsersListPane.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | CalendarUsersListPane.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Filters | CheckBoxFilter.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Filters | CheckBoxFilter.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | CommonTasksTasklet.js | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | CommonTasksTasklet.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | ConditionManager.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | ConditionManager.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dashboard-Combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Dashboard-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dashboard-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Dashboard-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Dashboard.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dashboard.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Dashboard_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Dashboard_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls | DashboardGroupListConfigurationProvider.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls | DashboardGroupListConfigurationProvider.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|QuickForms\|Design | DataSourcePanel.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|QuickForms\|Design | DataSourcePanel.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls | DateTimePicker.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls | DateTimePicker.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|Utility\|File<br>SupportFiles\|jscript\|Sage\|Utility\|File\|nls<br>SupportFiles\|jscript\|Sage\|Utility\|File\|nls\|en | DescriptionsForm.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Utility\|File<br>SupportFiles\|jscript\|Sage\|Utility\|File\|nls<br>SupportFiles\|jscript\|Sage\|Utility\|File\|nls\|en | DescriptionsForm.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Dialog-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dialog-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dialog-Combined.js.map | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|jscript\|Sage | Dialog-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Dialog.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Dialog.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Dialog_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Dialog_*.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | EditCalendarUsers.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | EditCalendarUsers.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls<br>SupportFiles\|jscript\|Sage\|UI\|Controls\|nls<br>SupportFiles\|jscript\|Sage\|UI\|Controls\|nls\|en | EntityInfoToolTip.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls<br>SupportFiles\|jscript\|Sage\|UI\|Controls\|nls<br>SupportFiles\|jscript\|Sage\|UI\|Controls\|nls\|en | EntityInfoToolTip.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Filters | FilterManager.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Filters | FilterManager.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | GridView.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | GridView.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | GroupListConfigurationProvider.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | GroupListConfigurationProvider.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | GroupMenuFmtScope.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | GroupMenuFmtScope.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|Utility | Groups.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Utility | Groups.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | GroupsTitlePaneConfigProvider.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | GroupsTitlePaneConfigProvider.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MailMerge | Helper.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MailMerge | Helper.js | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls\|en | HistoryEditor.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls<br>SupportFiles\|jscript\|Sage\|MainView\|ActivityMgr\|nls\|en | HistoryEditor.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Utility<br>SupportFiles\|jscript\|Sage\|Utility\|nls<br>SupportFiles\|jscript\|Sage\|Utility\|nls\|en | Jobs.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|Libraries | jquery-ui.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|Libraries | jquery.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Link.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Link.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | LiteratureManagementTasks.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|TaskPane<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls<br>SupportFiles\|jscript\|Sage\|TaskPane\|nls\|en | LiteratureManagementTasks.js | 01 |
| SlxClient | SupportFiles\|SmartParts\|LitRequest | LiteratureRequest.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MailMerge | Loader.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MailMerge | Loader.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | MailMergeService.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | MailMergeService_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | MailMergeService_*.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MailMerge | main.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MailMerge | main.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | main.05369be1.chunk.js | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|dashboard\|static\|js | main.05369be1.chunk.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls | MultiSelectPickList.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls | MultiSelectPickList.js | 01 |
| SlxClient | SupportFiles\|SmartParts\|OpportunitySalesProcess | OpportunitySalesProcess_ClientScript.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MailMerge<br>SupportFiles\|jscript\|Sage\|MailMerge\|nls<br>*+ 1 for each language de, en, fr, it, ru, zh-cn, zh-tw | OptionsPrompt.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MailMerge<br>SupportFiles\|jscript\|Sage\|MailMerge\|nls<br>*+ 1 for each language de, en, fr, it, ru, zh-cn, zh-tw | OptionsPrompt.js | 01 |
| SlxClient | SupportFiles\|SmartParts\|PickList | PicklistAliases.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract | PricingAvailablityWidget.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract | PricingAvailablityWidget.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract | PromoteWidget.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|MainView\|IntegrationContract | PromoteWidget.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|GroupBuilder | QueryBuilderMain.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|GroupBuilder | QueryBuilderMain.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | Quilleditor.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | Quilleditor.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Report-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Report-Combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Report-Combined.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Report-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Report.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Report.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Report_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Report_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|Mingle | Request.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Mingle | Request.js | 01 |

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|dashboard\|static\|js | runtime-main.57123be.js | 01 |
| SlxClient | SupportFiles\|dashboard\|static\|js | runtime-main.57123be.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Sage-Combined.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Sage-Combined.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Sage-Combined.js.map | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Sage-Combined.js.map | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage-platform | sage-platform-tabworkspace.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage-platform | sage-platform-tabworkspace.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage | Sage.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage | Sage.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|nls | Sage_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|nls | Sage_*.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | SDataLookup.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | SDataLookup.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls | Select.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls | Select.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI\|Controls | SingleSelectPickList.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI\|Controls | SingleSelectPickList.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|UI | TitleContentPane | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|UI | TitleContentPane | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Mingle | UserService.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Mingle | UserService.js | 01 |
| Infor CRM Customer Portal | SupportFiles\|jscript\|Sage\|Utility\|nls<br>SupportFiles\|jscript\|Sage\|Utility\|nls\|en | Utility.js | 01 |
| SlxClient | SupportFiles\|jscript\|Sage\|Utility\|nls<br>SupportFiles\|jscript\|Sage\|Utility\|nls\|en | Utility.js | 01 |

## Smart Parts

The following lists smart parts added or updated since v8.5.

| Portal | Page | SmartPart | 8.5.x |
|---|---|---|---|
| SlxClient | Pick Lists | AddEditPicklistAlias | 01 |
| SlxClient | Email Template Detail | EmailTemplateDetails | 01 |
| SlxClient | Email Template Detail | EmailTemplateProperties | 01 |
| SlxClient | Email Template Detail | LiveGroupViewer (Custom) | 01 |
| SlxClient | Insert Email Template | InsertEmailTemplate | 01 |
| SlxClient | Pick Lists | PicklistAliases (Custom) | 01 |
| SlxClient | CRM Workflow | LiveGroupViewer (Custom) | 01 |

## Menus

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

| Portal | Menu | Menu Item | 8.5.x |
|---|---|---|---|
| SlxClient | Compose | | 01 |
| SlxClient | Compose | Email Contact | 01 |
| SlxClient | Compose | Email Lead | 01 |
| SlxClient | Compose | Mail Merge | 01 |
| SlxClient | Compose | New Email template | 01 |
| SlxClient | Compose | Manage Email Templates | 01 |
| SlxClient | Tools | | 01 |

## Jobs

The following lists Job Service jobs added or updated since v8.5.

| Portal | Location | Job | 8.5.x |
|---|---|---|---|
| Infor CRM Job Service | Jobs | Sage.SalesLogix.BusinessRules.Jobs.MailMergeJob | 01 |

## Events

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

| Package | Entity | Event | 8.5.x |
|---|---|---|---|
| Saleslogix Security Support | UserProfile | OnBeforeUpdate | 01 |
| Saleslogix Activity Support | History | OnAfterUpdate | 01 |
| Saleslogix Application Entities | DiscountChargeItem | OnAfterDelete | 01 |
| Saleslogix Application Entities | EmailTemplate | OnAfterInsert | 01 |
| Saleslogix Application Entities | EmailTemplate | OnBeforeInsert | 01 |
| Saleslogix Application Entities | EmailTemplate | OnBeforeUpdate | 01 |
| Saleslogix Application Entities | PicklistAlias | OnBeforeInsert | 01 |
| Saleslogix Application Entities | PicklistAlias | OnBeforeUpdate | 01 |

## Modules

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

| Portal | Location | Module | 8.5.x |
|---|---|---|---|
| SlxClient | Pages\|Email Template Detail | Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule | 01 |

## Services

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

| Portal | Location | Service Name | 8.5.x |
|---|---|---|---|
| SData Integration Host | SupportFiles\|Services | Sage.Platform.AppServices.IDeveloperToolingService | 01 |

## Image files

The following lists image files added or updated since v8.5.

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|images | note_16.gif | 01 |

## Json

The following lists Json files added or updated since v8.5.

| Portal | Location | File Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|dashboard\|locales\|en | common.json | 01 |

## Miscellaneous/Additional Files

| | | Flie Name | 8.5.x |
|---|---|---|---|
| SlxClient | SupportFiles\|swagger | swagger.yaml | 01 |
| Infor CRM Customer Portal | SupportFiles\|CSS | LoginStyles.jsb | 01 |
| SlxClient | SupportFiles\|CSS | LoginStyles.jsb | 01 |

# ICRM SLX v8.5.0.01 Web Actions bundle

This bundle contains the following:

## Database Objects

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

| Database Object | 8.5.x |
|---|---|
| UpdateSystemInfoCoreVersion(All) | 01 |
| Update HostBackOfficeId and SubscriberApp | 01 |
| GLOBALCHANGETRACKING Triggers (MSSQL) | 01 |
| EMAILTEMPLATEPROPERTYVIEW (MSSQL) | 01 |
| EMAILTEMPLATEPROPERTYVIEW (Oracle) | 01 |
| Update IsolateContent and IsolateBOEContent | 01 |
| Update_Triggers (MSSQL) | 01 |

## Inserted Records

The following lists entities with inserted records since in v8.5.

Open the ICRM SLX v8.5.0.01 Web Actions bundle, select the Insert Records item, use the details pane to view specific information about the action. For example, to view the SQL query, click the SQL tab.

| Entity | 8.5.x |
|---|---|
| VIRTUALFILESYSTEM | 01 |
| CUSTOMSETTINGS | 01 |

## Create Indexes

The following lists indexes added since in v8.5.

| Index Name | 8.5.x |
|---|---|
| PRODUCTACCOUNTINGENTITY.PRODUCTACCOUNTINGENTITY_BACKOFFICEACCTENTITYID | 01 |
| PRODUCTACCOUNTINGENTITY.PRODUCTACCOUNTINGENTITY_BACKOFFICEID | 01 |
| PRODUCTACCOUNTINGENTITY.PRODUCTACCOUNTINGENTITY_PRODUCTID | 01 |
| PRODUCTLOCATION.PRODUCTLOCATION_LOCATIONID | 01 |
| PRODUCTLOCATION.PRODUCTLOCATION_PRODUCTID | 01 |
| ERPBILLTOACCOUNTINGENTITY.ERPBILLTOACCOUNTINGENTITY_BACKOFFICEACCTENTITYID | 01 |
| ERPBILLTOACCOUNTINGENTITY.ERPBILLTOACCOUNTINGENTITY_BACKOFFICEID | 01 |
| ERPPAYFROMACCOUNTINGENTITY.ERPPAYFROMACCOUNTINGENTITY_ BACKOFFICEACCTENTITYID | 01 |
| ERPPAYFROMACCOUNTINGENTITY.ERPPAYFROMACCOUNTINGENTITY_BACKOFFICEID | 01 |
| ERPPAYFROMACCOUNTINGENTITY.ERPPAYFROMACCOUNTINGENTITY_PAYFROMID | 01 |

| Index Name | 8.5.x |
|---|---|
| ERPPERSONACCOUNTINGENTITY.ERPPERSONACCOUNTINGENTITY_ BACKOFFICEACCTENTITYID | 01 |
| ERPERSONACCOUNTINGENTITY.ERPPERSONACCOUNTINGENTITY_BACKOFFICEID | 01 |
| ERPERSONACCOUNTINGENTITY.ERPPERSONACCOUNTINGENTITY_PERSONID | 01 |
| ERPSHIPTOACCOUNTINGENTITY.ERPSHIPTOACCOUNTINGENTITY_BACKOFFICE | 01 |
| ERPPAYFROMACCOUNTINGENTITY.ERPSHIPTOACCOUNTINGENTITY_ BACKOFFICEACCTENTITY | 01 |
| ERPPAYFROMACCOUNTINGENTITY.ERPSHIPTOACCOUNTINGENTITY_SHIPTO | 01 |
| SLXLOCATIONACCOUNTINGENTITY.SLXLOCATIONACCOUNTENTITY_BACKOFFICE | 01 |
| SLXLOCATIONACCOUNTINGENTITY.SLXLOCATIONACCOUNTENTITY_BACKOFFICEACCTENTITY | 01 |
| SLXLOCATIONACCOUNTINGENTITY.SLXLOCATIONACCOUNTENTITY_BACKOFFICELOCATION | 01 |

## New or Updated Custom Settings

The following lists custom settings added or updated since in v8.5.

| Custom Setting | Description | 8.5.x |
|---|---|---|
| [Saleslogix] Isolate Content by Logical ID = False | In support of rare Back Office implementations based on two or more host ERP systems with data defined using a common ERP Accounting Entity.<br>Most implementations should be false. | 01 |
| [Back Office Extension] Isolate Content by Logical ID = False | In support of rare Back Office implementations based on two or more host ERP systems with data defined using a common ERP Accounting Entity.<br>Most implementations should be false. | 01 |
| [Groups] Group List Double Click Enabled = True | If set to True, double-clicking a record in a list view opens that record in the detail view.<br>By default this is set to True.<br>If set to False, disables double-clicking a record in a list view to open that record in the detail view. | 01 |

## New or Updated Plugins

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

| Plugin Name | 8.5.x |
|---|---|
| [DashboardPage] System:MyDashboard (Infor 8.501) | 01 |
| [DashboardWidget] System:Group List (Infor 8.501) | 01 |
| [DashboardWidget] System:Todays Activities (Infor 8.501) | 01 |
| [Group] EMAILTEMPLATE:All Templates (Infor 8.501 | 01 |
| [Group] EMAILTEMPLATE:My Templates (Infor 8.501 | 01 |
| [ResponsiveDashboardPage] System:My Dashboard (Infor 8.501) | 01 |

## Updated or New Secured Actions

The following lists secured actions added or updated since in v8.5.

| Secure Action | Role/Description | 8.5.x |
|---|---|---|
| Entites/EmailTemplate/Add | Standard Role<br>Ability to add a Mail Merge email template. | 01 |
| Entites/EmailTemplate/Delete | Standard Role<br>Ability to delete a Mail Merge email template. | 01 |
| Entites/EmailTemplate/Edit | Standard Role<br>Ability to edit a Mail Merge email template. | 01 |
| Entites/EmailTemplate/View | Standard Role<br>Ability to view Mail Merge email templates. | 01 |
| Toolbar/Compose | Standard Role<br>Allows access to the Compose menu on the toolbar. | 01 |

## New or Updated Roles

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

| Role | Description | 8.5.x |
|---|---|---|
| Standard User | Updated to include new secured actions for Mail Merge. | 01 |

# Chapter 4
# Resolved Issues and Improvements

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

## Issues fixed in v8.5.0.1

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

| Defect | Description |
|---|---|
| INFORCRM-5280 | An error occurs when saving a new reseller for opportunity if the old reseller was deleted. |
| INFORCRM-18098 | In the Application Architect, when a lookup control is configured as a drop-down list and Required is set to True, the Web Client fails to validate the control upon saving. |
| INFORCRM-20015 | SData should not allow updates to any users data but your own unless you are the admin. |
| INFORCRM-20231 | Exporting records from the Lookup Results group may export the incorrect records in a particular scenario. |
| INFORCRM-20580 | Enable to commit changes to "Started On" and "Completed On" dates on the Sales Process tab for an opportunity when using a Surface Pro device. |
| INFORCRM-21628 | The activity alarm query can take a long time to process. |
| INFORCRM-22334 | The Reset icon causes data to disappear in the Region and Credit Rating fields. |
| INFORCRM-22853 | In Query Builder if using a custom SQL view no fields display. |
| INFORCRM-22865 | When a group filter is a user lookup, the records exported may not match the filters selected. |
| INFORCRM-22923 | Opportunity Statistics displays an error when executed on a lookup group where the condition contains an integer type field. |
| INFORCRM-22965 | Updates made in a detail view tab are not saved after the user navigates to another tab. |
| INFORCRM-23290 | The Comments field on the Contract and Return detail views is too small. |
| INFORCRM-23572 | Cannot snooze the alarm of an unconfirmed activity in the Alerts dialog box. |
| INFORCRM-23596 | (ICBOE) When integrated with SyteLine, changing currency on the Sales Order Snapshot displays an exception error. |
| INFORCRM-24166 | The Help icon in Query Builder dialog boxes should be white. |
| INFORCRM-24179 | In Entity Manger, the display name is not populated when creating a new filter. |
| INFORCRM-24208 | In Application Architect an out of memory exception error is displayed when deploying portals. |
| INFORCRM-24214 | The ability to go back to the Workflow Integration detail view from any Workflow detail view does not exist. |

| Defect | Description |
|---|---|
| INFORCRM-24337 | Retired users should not display in team member lookups. |
| INFORCRM-24441 | Query Builder displays the entity table name value instead of the display name. |
| INFORCRM-24558 | The Ticket Activity Fields help topic does not include the Due Date field. |
| INFORCRM-24581 | The Sales Order, Ship-To lookup does not filter the results to only include contacts associated to the assigned account. |
| INFORCRM-24676 | Using a group with an & in the group name causes an error when creating a group list widget on the Welcome page. |
| INFORCRM-24682 | (ICBOE) Upgrade the CPQ interface to TDCI.Configurator.Integration.Core.dll v9. |
| INFORCRM-24715 | Replace the existing Notes icon with the Infor Uplift Notes.png in all locations. |
| INFORCRM-24770 | The Dispose() method should be called on .NET classes implementing IDisposable. |
| INFORCRM-24783 | (ICBOE) Updates to the Sync BOD soft delete rules. |
| INFORCRM-24797 | The unsaved data prompt does not display for specific changes in tab controls. |
| INFORCRM-24882 | (ICBOE) User can edit/delete ERP bill to/ship to addresses when they only have view access. |
| INFORCRM-25031 | Cannot scroll through all records when an entity is created from SQL view. |
| INFORCRM-25089 | Dragging a tab from the middle pane to a grid leaves a tooltip on screen. |
| INFORCRM-25126 | Running the CRM Workflow job manually displays the error "The job service is currently not available, please turn on or restart the service". |
| INFORCRM-25171 | In Group Manager, the Owner filter is not displaying names in alphabetic order. |
| INFORCRM-25194 | Users should not be able to add more than 25 users to the Calendar. |
| INFORCRM-25299 | Dragging tabs to the middle pan sometimes does not respond and can leave the label behind. |
| INFORCRM-25315 | Update JQuery to version 8.4. |
| INFORCRM-25489 | The Share icon on the Dashboards has been updated. |
| INFORCRM-25501 | The title for adding an attachment is missing the entity for which the attachment is being added. |
| INFORCRM-25579 | On the Activities tab the Leader filter does not return any results. |
| INFORCRM-25612 | (ICBOE) A warning message is displayed while saving a cloned back office or custom BOD mapping. |
| INFORCRM-25631 | On theWorkflow Step Instance - Approval step view, the tooltip for the Delete icon displays as "undefined". |
| INFORCRM-25671 | On the ION Workflow view the insert icon does not have a tooltip. |
| INFORCRM-25721 | The View Group link on the Welcome page opens the wrong group. |
| INFORCRM-25787 | The What's New Notes tab displays an error when sorting on the name column. |
| INFORCRM-25794 | Sharing a notes/history items to Ming.le is not working. |
| INFORCRM-25802 | In the Application Architect, a newly created property is not marked as IsCustom in the entity properties grid for an entity. |
| INFORCRM-25816 | (ICBOE) When integrated with CSD, a sales order can be duplicated. |
| INFORCRM-25820 | (ICBOE) Add BackOfficeId value to internal UniqueID value to isolate content by LogicalID. |
| INFORCRM-25824 | Add new BackOffice entity relationship to each of the primary integrated entities. |

| Defect | Description |
|---|---|
| INFORCRM-25828 | Inactive contacts should not display in the lookups in activities, notes, history, and complete an activity. |
| INFORCRM-25830 | Implement an Office Profile email setup button. |
| INFORCRM-25834 | CRM Workflows do not trigger for the ticket entity. |
| INFORCRM-25862 | Ticket "Print View" does not display ticket activities data. |
| INFORCRM-25866 | Moving tabs around in the middle pane freezes the middle pane and the tab fails to move to the new location. |
| INFORCRM-25883 | (ICBOE) After promoting a quote created without adding a warehouse location an error is displayed. |
| INFORCRM-25889 | (ICBOE) Quote BODs coming from CPQ display the error "Object references not set to an instance of an object". |
| INFORCRM-25898 | (ICBOE) The bracket '[' character, hexadecimal value 0x5B, cannot be included in a name when generate template is selected for Product.ProductRestriction. |
| INFORCRM-25908 | Query Builder displays both the Account.Territory and Account.ERPTerritory fields as "Territory". |
| INFORCRM-25916 | Exporting lookup results applies conditions from the default group set in Tools, Options, Groups tab. |
| INFORCRM-25921 | In Application Architect the production.js and other Mobile .js files are not visible. |
| INFORCRM-25923 | Standard users are able to see reports generated by the Admin on the Report’s History group. |
| INFORCRM-25927 | If a custom parameter does not include sort criteria, navigating records via the first, previous, next and last buttons on a detail view, may not match the records displayed in the group list. |
| INFORCRM-25930 | Adding a custom setting is displaying the error "The custom setting must contain a Key-value, please enter a unique Key value before continuing". |
| INFORCRM-25964 | (ICBOE) When Back Office Extension and local pricing is enabled, several tabs are hidden in opportunities, quotes and sales orders. |
| INFORCRM-25972 | Welcome widget links point to the 8.4.x version of the Web Client help, not the 8.5 version. |
| INFORCRM-25978 | (ICBOE) In an integrated Sales Order detail view accessing the Bill To tab displays an exception error. |
| INFORCRM-25990 | Changing the account on a new opportunity does not change the account currency. |
| INFORCRM-26006 | Currency lookup icon disappears when you save changes on an account. |
| INFORCRM-26010 | (ICBOE) UniqueID support for 3-way integrations with CPQ-EQ. |
| INFORCRM-26048 | On the Activities tab the Leader lookup does not return data and the activity type filter does not return results. |
| INFORCRM-26051 | SData is not sending cookies when queried through IONAPI. |
| INFORCRM-26055 | (ICBOE) Implement CSI BOD-based prospect to customer conversion process. |
| INFORCRM-26056 | The Common Task Add to Group context menu will not disappear until an ad hoc group is selected or the browser is refreshed. |
| INFORCRM-26062 | (ICBOE) When merging an account created in an ERP with an account created in Infor CRM the error “An exception occurred executing the dynamic method Account.MergeAccount” is displays. |
| INFORCRM-26081 | Unable to export a group containing a column of type percentage. |

| Defect | Description |
|---|---|
| INFORCRM-26083 | The calendar allows the selection of more than four calendars but then no longer functions. |
| INFORCRM-26146 | The fields on the CPQ details tab should be enabled when enabling CPQ integration, and should not require BOE integration to be enabled. |
| INFORCRM-26158 | (ICBOE) In the Sync History list view, the SendFrom description is incorrect. |
| INFORCRM-26169 | Canceling a lead conversion with pending changes converts the lead and displays an exception error. |
| INFORCRM-26198 | In Application Architect hide the option to create a project backup and restrict the ability to restore a project unless the project is ICRM v8.5.0 Project Backup or ICRM v8.4.0 Project Backup. |
| INFORCRM-26273 | When creating a new role the ErpRoleName should be prefixed with 'CRM' and updated to match the RoleName. |
| INFORCRM-26298 | Scheduling an activity requires multiple clicks on the 'OK' button if the 'OK' button is not initially in view. |
| INFORCRM-26354 | In the Activity list view, updating multiple older activities at the same time does not save the changes. |
| INFORCRM-26363 | (ICBOE) Junction records for ERPBILLTOACCOUNT and ERPSHIPTOACCOUNT are not created when MDC is set to False. |
| INFORCRM-26371 | Changing the sales process of an opportunity, leaves behind orphaned records in the SalesProcessAudit table. |
| INFORCRM-26379 | Implement an option to turn off the ability to navigate to a detail form from the list view via double-clicking on the record. |
| INFORCRM-26391 | When dragging and dropping an email to the Notes/History tab, the history prompt is missing the controls to modify the associations. |
| INFORCRM-26426 | In Application Architect, the custom folder is not created if the model folder is created with a lowercase 'm'. |
| INFORCRM-26455 | When moving a contact with open activities to another account the error “The call to SmartParts_Contact_MoveContact.cmdOK_Click failed” displays. |
| INFORCRM-26481 | In Application Architect, core smartparts are deleted from the Virtual File System (VFS) table when attempting to delete a custom smartpart. |
| INFORCRM-26486 | In Application Architect unable to delete custom entities when using a Local File System (LFS). |
| INFORCRM-26489 | In Application Architect unable to access SalesLogix Application Entities after adding more than one code snippet to an entity when using a Local File System (LFS). |
| INFORCRM-26511 | In Application Architect when installing a bundle with a role, the ERPRoleName field should be populated with CRM-role name. |
| INFORCRM-26518 | In Application Architect, cannot manually bundle customized files under Portal Manager using drag and drop. |
| INFORCRM-26529 | When using SSL and Bing as the provider for Contour, the map for temporary places fails to display. |
| INFORCRM-26619 | In Application Architect custom subfolders added to a Local File System (LFS) are also created in the model folder. |
| INFORCRM-26620 | When using a calendar date/time control, pressing Enter should default the value to the current date/time and close the calendar control. |

| Defect | Description |
|---|---|
| INFORCRM-26663 | The @ mention does not allow a user to type the table name and then property. |
| INFORCRM-26690 | In theSchedule/Edit Activity dialog box, display information when hovering over an association. |
| INFORCRM-26707 | (ICBOE) The Sales Order Snapshot totals are not updating after removing the distributed charge in CSD. |
| INFORCRM-26722 | (ICBOE) The promotion successful dialog is not displaying after promoting a sales order. |
| INFORCRM-26751 | (ICBOE) The processing of CustomerPartyMaster BODs generates incorrect pick list items. |
| INFORCRM-26769 | Custom subfolders in the Virtual File System (VFS) are not created in SLXCoreCustom folder when creating a Local File System (LFS) in Application Architect. |
| INFORCRM-26795 | Create a bundle action for updating an existing config file without overwriting the existing file. |
| INFORCRM-26841 | Scheduling an activity fails when "img" text is entered in the notes section. |
| INFORCRM-26856 | On the Welcome page, the "View Activities" quick actions link goes to ".../ActivityManager.aspx" but should be going to "../Activity.ascx". |
| INFORCRM-26858 | SData feed is not generated for new entities when using a Local File System (LFS). |
| INFORCRM-26872 | After converting a lead the account does not have notes/history records that were associated to the lead. |
| INFORCRM-26878 | Potential security vulnerability in Query Builder and SData. |
| INFORCRM-26896 | On the Associate an Account view, the Description field is limited to four characters. |
| INFORCRM-26910 | Editing an activity created by another user can generate numerous errors in the event logs. |
| INFORCRM-26958 | Mail Merge Word add-in: Add formatting to better differentiate column headings in lookups and lists. |
| INFORCRM-26960 | Mail Merge Word add-in: Adjust Merge Options tab layout. |
| INFORCRM-26963 | When column names that include underscores are used in Query Builder and the Entity Linked option is checked, sometimes the value in the list is not set as a link. |
| INFORCRM-26980 | Mail Merge Word add-in: History Options Regarding field should set to the name of the template if left blank. |
| INFORCRM-26997 | Newly created css file for the login/logoff pages is not used when loading the login/logff pages. |
| INFORCRM-27026 | The Notes/History tab Share on Mingle button produces error. |
| INFORCRM-27041 | Successful logins for WebViewer users are not displayed on the Audit Log tab. |
| INFORCRM-27055 | In the Web Client User detail view it should not be possible to change the name of the administrator user. |
| INFORCRM-27070 | In the Mail Merge Word add-in, opening the Manage Template dialog displays the error "Could not retrieve the list of templates. The index is out of range. It must not be negative and smaller than the collection". |
| INFORCRM-27101 | (ICBOE) In dynamic generation of picklist lines the languagecode needs to be taken from picklistheader language code and not backoffice language code. |
| INFORCRM-27107 | Insert Quote and Insert Sales Order fails to update the Exchange Rate currency value if selected account contains a different currency code value. |
| INFORCRM-27120 | (ICBOE) Opportunity fields are locked for an extended period of time when data is sent to ION. |

| Defect | Description |
|---|---|
| INFORCRM-27147 | Column headers disappear when a button is pressed in an editable grid. |
| INFORCRM-27151 | Picklist items not are showing when both the Required and Allow Multiple Selections options are enabled. |
| INFORCRM-27184 | Tab forms bound to the main entity do not save edited data if you go to another and tab then save. |
| INFORCRM-27190 | (ICBOE) Quote price overrides are lost when converting to a sales order. |
| INFORCRM-27191 | In Query Builder, after saving a condition, an exception error is displayed in the event viewer. |
| INFORCRM-27195 | Mail Merge Word Add-in: add Email Subject to template properties. |
| INFORCRM-27244 | In Application Architect unable to see custom properties added to the out of the box entities. |
| INFORCRM-27248 | The group tabs are fetching the group list twice which may impact performance. |
| INFORCRM-27267 | When creating a new user periodically an exception error displays. |
| INFORCRM-27268 | In reports, the list of value options is limited to 1000 records. |
| INFORCRM-27277 | In Query Builder, when creating a calculated field the calculated field dialog will not close. |
| INFORCRM-27324 | In Application Architect custom files and folders are written to the Local File System (LFS) Model folder when those custom folders have the name "Custom". |
| INFORCRM-27350 | (ICBOE) Grand Total and Discount/Charges are missing after converting a quote to a sales order. |
| INFORCRM-27356 | In Application Architect display names for custom entities and their properties are not showing after a custom bundle is installed. |
| INFORCRM-27365 | Cannot open a file through Speedsearch when using a file system SpeedSearch index. |
| INFORCRM-27393 | Lookups with an apostrophe in the search condition value fail to return any results. |
| INFORCRM-27401 | In Application Architect hide "New Manifest by Differences" and "Create Manifest by Project Differences" bundle options. |
| INFORCRM-27410 | Filters fail to return results that include leading spaces. |
| INFORCRM-27416 | Filtering a group with more than 8 joined tables displays an error. |
| INFORCRM-27423 | Mail Merge Word add-in: When converting templates the error "End of Central Directory record could not be found" displays. |
| INFORCRM-27451 | When a lookup has the type set to user lookup the filter does not work and an error "The multi-part identifier \"TableX.FieldX\" could not be bound." displays in the event viewer. |
| INFORCRM-27476 | (ICBOE) Refresh pricing and get order total functionalities are not working for unpromoted quote and sales order. |
| INFORCRM-27485 | Lookup controls appear distorted when clicking on them a second time after setting a dialog height and width. |
| INFORCRM-27542 | When using a Local File System (LFS) making a custom entity an extension causes the entity to be duplicated in Application Architect and SLXCoreCustom. |
| INFORCRM-27572 | Workflow Step edit dialog does not render rich text controls. |

# Appendix

## Providing customizations to a different 8.5.x environment

In place of creating a project backup, Infor CRM recommends creating a bundle of your current customizations.

**To create a bundle of customizations**

1. Open Application Architect.
2. On the **View** menu, click **Project Explorer**.
3. Right-click **Bundle Model** and click **New manifest By Customization**.
4. Enter a **Name** and **Description**.
5. Click **Save**.
6. In **Project Explorer**, expand **Bundle Model**.
7. Right-click your newly created bundle manifest.
8. Click **Create Bundle**.
9. Browse to the locations where you want to create the bundle and click **Save**.

## Returning to a restore point

In place of creating and restoring from project backups, Infor CRM recommends creating a bundle of your current, stable customizations prior to making any new customizations. Creating a bundle of your current customizations will provide you with a restore point in case you need to restore your model after making an undesirable customization.

1. Restore from the **ICRM v8.5.0 Project.Backup.zip** provided with the Infor CRM v8.5 release.
2. Apply any Infor CRM updates.
3. Apply the bundle of your customizations that you created prior to the undesirable customizations you want to undo.
4. Build and deploy your web portals.