Infor CRM SLX v9.0 Release Notes

Publication Information

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Contents

Introduction

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, Accounting Integration, and Support automation solutions.

About This Guide

This document provides instructions for upgrading existing installations from Infor CRM SLX version 8.5 or later to version 9.0.

Version 9.0 will uninstall earlier versions of Infor CRM SLX before installing version 9.0.

If you are upgrading from Infor CRM SLX version 8.5 or later, follow the steps in this guide.

If you have never installed a version of Infor CRM SLX, do not use this guide. Refer to the instructions in the *Infor CRM SLX Implementation Guide* document provided with this release.

If you are upgrading from a version of Infor CRM SLX or Saleslogix prior to version 8.5, you must first upgrade to version 8.5 or later before upgrading to version 9.0. Use the upgrade instructions in the appropriate upgrade documents on the support portal web site: Infor Concierge at https://concierge.infor.com/

DO NOT install this release on any Infor CRM SLX version earlier than 8.5.

Prerequisites

The following table shows software prerequisites that will automatically be installed on your computer if they are not already installed. Installing these prerequisites may require your computer to restart.

1. For additional prerequisite compatibility information for Infor CRM SLX v9.0 is available in the Infor Online Compatibility Matrix (OCM).
2. Log on to the Infor Support Portal web site: https://concierge.infor.com/.
3. Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
   Click Help for a video explaining the features of the OCM.

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

Prerequisites	Admin Tools and Servers	Windows Client	Remote Office	Remote Client	Offline Web Client	Web Host
Windows Installer 4.5.1	X		X	X	X	
Microsoft Exception Message Box	X		X	X		
Microsoft .NET Framework 4.8	X		X	X	X	X
Microsoft .NET Framework 4.8 Developer Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server Express 2012 RTM (Optional)[1]	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X

[1] If a version of the Microsoft SQL Server database is already installed, the Microsoft SQL Express, installation will not complete successfully. Decline the option to install if it is offered.

Related Documentation

In addition to this document, you may find the following documentation helpful.

- Compatibility information for Infor CRM SLX v9.0 is available in the Infor Online Compatibility Matrix (OCM) available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/. See "Prerequisites" on page 2 for instructions.
- The *Developer Tips* online Help contains information for developers, Webmasters, and IS professionals who are customizing the Infor CRM SLX Web Client or creating custom Web applications. This help file contains conceptual overviews, customization scenarios, code samples, and references to help you develop your Web applications. The Developer Tips Help is available from the Application Architect help system.
- The *Infor CRM SLX Back Office Extension Configuration Guide for ION* provides configuration and implementation information for integrating Infor CRM SLX Back Office Extension functionality with Infor ION. This document describes configuration requirements and provides setup instructions. It describes the ION connection points that are used in the integration and provides information about the business events or user actions in Infor CRM SLX that send Business Object Documents (BODs) to ION Connect. This document is available with the product media and from the Infor Support Portal on the Infor Concierge web site: https://concierge.infor.com/.
- The *Infor CRM SLX Back Office Extension Customization Guide* provides instructions for customizing the Infor CRM SLX v9.0.x Back Office Extension functionality to integrate with your ERP system when using Infor ION Connect. This document is available with the product media and from the Infor Support Portal web site: https://concierge.infor.com/.
- The *LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize the Infor CRM SLX Windows (LAN) Client to meet your specific needs. It is available from the Infor Support Portal web site: https://concierge.infor.com/.
- Online Help is available in each Infor CRM SLX application.
- The Infor CRM Web Client online help is available from https://docs.infor.com/en-us/crm/8.5.x

Contacting Infor

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

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select Search > Browse Documentation. We recommend that you check this portal periodically for updated documentation.

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

Chapter 1
Upgrade workplan

1

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

- **All** - all Infor CRM SLX installations.
- **Web** - installations that include Web components.
- **Mobile** - installations that include the Mobile client.
- **Network** - installations that include Network components.
- **Remotes** - installations that include Remote users or Remote Offices.
- **Customized** - installations that have customized their Infor CRM SLX environment.
- **Oracle** - installations running Infor CRM SLX on an Oracle database.
- **Microsoft SQL Server** - installations running Infor CRM SLX on a Microsoft SQL Server database.
- **Outlook Sync** - Installations that include Outlook Sync
- **Infor CRM SLX Back Office Extension** - Installations that are integrated with an ERP system using the Back Office Extension features.

- Sync for Exchange 1.0.2 and Sync for Gmail 1.2 are compatible with Infor CRM 8.5 or later. Please install the latest version available after upgrading to Infor CRM 8.5. No other versions of Sync for Exchange or Sync for Gmail are compatible with Infor CRM 8.5 or later.
- Outlook Integration functionality is delivered with Infor CRM Xbar. The Infor CRM Xbar v1.4.2 installation is provided on the 9.0 media.

Preparing to upgrade

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

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

Required for	Task	Description

All	**1**	**Read the Infor CRM SLX v9.0 Release Notes**
		
		Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.
		
		■ Chapter 1, “Upgrade ‘Workplan” - contains upgrade tasks explaining how to:
		  ■ Prepare your database
		  ■ Upgrade the core Infor CRM SLX components
		  ■ Cut new remote remote databases
		  ■ Upgrade your clients (Web, Mobile, Network, Offline, Remote)
		  ■ Enable new features added in version 9.0
		  ■ Upgrade Back Office Extension.
		  ■ Upgrade existing integrations such as Infor CRM Xbar for Microsoft Outlook.
		■ Chapter 2, "What's New in this release" - details the new features, functionality changes, and enhancements in this release. Any change that impacts customizations is identified as a [Breaking Change].
		■ Chapter 3, "Changes in this release" - details the schema, plugin, and file changes in this release.
		
		Before upgrading, ensure that:
		
		■ Your current Infor CRM SLX version is 8.5 or later and Web portals included in your installation are version 8.5 or later and have deployed successfully.
		■ You review the Online Compatibility Matrix (OCM) to understand the supported platforms, applications, and system requirements for this release.

All	**2**	**Test environment** Install this release in a test environment before installing on your production database. Create a test environment to review new features and for use after upgrading your production environment. If your installation includes customizations, you can use the test environment to compare your customizations with your upgraded production environment. Refer to the support portal web site: Infor Concierge at https://concierge.infor.com/ for more information. Search for “How to set up an Infor CRM SLX test environment” for information on using a copy of your production database in a test environment. **Note**: Make sure you change your logging paths in the Administrator to access the test environment or errors will occur.
All	**3**	**Admin rights** Grant admin rights to the person installing the upgrade. Offline (disconnected) Web Client users can upgrade without admin rights on their machines. Other users require admin rights when installing Infor CRM SLX.

Required for	Task	Description
Web	**4**	**Cache Server requirements** Open Windows Firewall and add an exclusion for port 11211. The Cache Server requires access to this port. The Cache Server is used to speed processing of the Web Client by providing storage for cached information. The Cache Server can be installed on any server, however, avoid installing it on a high-activity machine such as the SpeedSearch Server. Do not install multiple instances of the Cache Server in your environment.

Protecting your customizations

Complete these tasks if your existing environment includes customizations to the Windows and/or Mobile clients. If your existing environment does not include any customizations, proceed to task number 8 in "Preparing your Infor CRM database"

Required for	Task	Description
Customized Infor CRM SLX Mobile	**5**	**Mobile customizations** Save any customizations made to **Infor CRM SLX Mobile**. Before deleting the existing Mobile portal, you must save any changes you have made directly in the portal SupportFiles to a bundle or onto your local file system. This includes changes to out-of-the-box views or classes, any views or JavaScript files you have added, or any changes to configuration or content. Failure to save these changes will cause them to be lost when you delete the portal.
Customized Network	**6**	**Network Client customizations** Record your Network Client customizations and use the Architect to create a bundle of all customized plugins in your database. See the “Working with Bundles” topic in the Architect Help for instructions. Infor CRM SLX does not overwrite your customized plugins. However, this bundle can be used as a backup of your customizations.
Customized Network	**7**	**Network Client, review plugin changes** Review the Infor CRM SLX plugin changes to determine if you have customized any plugins that are updated in this release. Review the "Plugins" section in Chapter 3, "Changes in this release" for all plugin changes. After reviewing plugin changes, determine if you are going to add your customizations to the plugins in this release (recommended) or add the Infor CRM SLX changes to your custom plugins.

Preparing your Infor CRM database

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

Required for	Task	Description
Microsoft SQL Server	**8**	**Remove replication** If you are using Microsoft SQL Server and have published your database for replication, remove replication. Remember to reset replication after your upgrade is complete. **Note**: Merge and Snapshot Replication are not compatible with Infor CRM SLX.
All	**9**	**Run Integrity Checker** Run the Integrity Checker on your database. Integrity Checker is run from the Tools menu in the Administrator. See the “Integrity Checker” topic in the Administrator Help for instructions. If you are running the Integrity Checker on a database that is not located on the same network as the CRM Library and attachments, clear the Attachment and Library tests before you repair the database.
All	**10**	**Ensure all users sign off** Make sure all users have signed off from Infor CRM SLX.
Remotes	**11**	**Final synchronization cycle (Remotes)** Instruct all Remote users and Offices to run a final synchronization cycle. **Note**: Once the Main office is upgraded, remote users will still be able to synchronize changes to the host but will not be able to receive any changes until they have upgraded.
Remotes	**12**	**Final synchronization cycle (Sync Server)** Execute a final cycle of all sync servers. The final sync cycle must run successfully and send out all pending transactions.
Remotes	**13**	**Stop the Sync Service(s)** If using a third-party scheduling package, deactivate the Synchronization Server tasks.
All	**14**	**Close and stop Infor CRM applications and services** Close all Infor CRM SLX applications and stop all applications and services that access the Infor CRM SLX database using the Infor CRM SLX OLE DB Provider. Having services running during installation can impede the installation process and generate errors.
All	**15**	**Back up production database** Back up your production database. Verify the backup is successful and complete. You may also want to create a backup at various points in the upgrade process. For example, after running the patch but before installing bundles. Then, if you need to revert your installation, you can choose a backup created during the upgrade without having to start from the beginning.

Upgrading your core components

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

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Network only

using

Microsoft Outlook Infor CRM SLX Address Book</td><td>16</td><td>Install the Web Host and build and deploy SData portal and client

Infor CRM SLX implementations that are Windows Client-only (no Web) and use the Infor CRM (SLX) Address Book, Insert VCard, Insert Contact Card, and Insert Library Doc features in Microsoft Outlook must install the Web Host and build and deploy the SData portal and client to continue to use those features in v9.0.

Refer to Chapter 5 Installing the Web Components in the Infor CRM Implementation Guide for instructions.</td></tr>
<tr><td>Infor CRM SLX Xbar which includes Outlook Sync</td><td>17</td><td>Installing Infor CRM SLX Xbar which includes Outlook Sync

If your implementation is LAN only, and you will be adding Infor CRM Xbar for Microsoft Outlook to your implementation, you must deploy a SData portal.

If your installation is:
Windows Network Client only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals.
Windows Remote Client: no extra actions required. The SDataportal is deployed as part of the LAN Remote Client install.</td></tr>
<tr><td>All</td><td>18</td><td>Upgrade main office computer

Upgrade your main office computers using the Administrative Tools and Servers installation. This includes the Administrative Workstation, Synchronization Server, SpeedSearch Server, and Job Server.

Note: The installation creates folders and applies permissions necessary for Infor CRM SLX to function. To avoid unexpected results, we recommend contacting Infor CRM SLX Technical Support or your Business Partner before changing default settings on these folders.

The Administrative Tools and Servers installation allows you to select one or multiple applications to install on the same computer. The installations remove only the applications with a prior version and then install ONLY the applications for the installation that you selected. For example, if you have the Administrator, Architect, and Infor CRM SLX Client on your Administrative Workstation computer and you run the Administrative Tools and Servers install, only the Administrator and Architect will be removed and reinstalled. To upgrade the Sales Client, you must then run the Network Client install at which point only the Infor CRM SLX Client will be removed and reinstalled.

Important:
The Job Service is required for Web Client functionality.
If your installation is Windows-only and has been using the SLX Address Book (now rebranded to Infor CRM Address Book) and related features in Microsoft Outlook, complete task number 16 before proceeding with this task.
If your installation includes Remote users or Remote Offices, you must upgrade your Synchronization Server(s).
If your implementation includes Outlook Sync, read task number 17 before proceeding with this task.
To upgrade
Infor CRM SLX media> Server Installation > Required Administrative Tools and Servers.
If the Open File - Security Warning dialog appears, click Run.</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>
<ol start="3">
If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may require your computer to restart.

Click Install to continue with the installation.
Click Cancel to exit the Administrative Tools and Servers installation.

For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. If a message box offering to install an optional prerequisite (such as Microsoft SQL Server 2012 Express SP1) opens, do one of the following

Click Yes to install the referenced software.
Click No to cancel installation of the prerequisite, but continue to install Infor CRM.

On the Welcome screen, click Next.
On the Setup Type screen, select an installation type.

Select Complete to install all program features and the Microsoft SQL Server databases.
Selecting this option installs Infor CRM SLX using the Local System Account. To set a different user, particularly if SpeedSearch indexes include files located on another computer, select the Custom option.
Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation.

Saleslogix Server - installs the components that primarily handle logging and licensing for Infor CRM SLX. This is required for all installations.
Administrator - installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses.
Architect - installs the component used to customize the Infor CRM Client.
Application Architect - required to configure and customize the Infor CRM SLX Web components and portals.
Job Service - installs the service used for scheduling tasks for immediate or delayed execution. You must install this service if your implementation includes any type of Infor CRM SLX Client because it is required for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel.
Messaging Server - enables communication between Infor CRM service components. This is required for all installations.
Cache Server - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do not install on the SpeedSearch Server, and be sure to install only once per implementation.
SpeedSearch Server - installs the SpeedSearch Service.
Synchronization Server - required if your installation will include remote users or a remote office.

</td></tr>
</table>

Required for	Task	Description
		• **.NET Extensions** - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework. • **Utilities** - multiple applications to aid with customization and database maintenance. 7. Click **Next**. 8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: ■ **SQL Server sa password** - If you have a password set on the sa account on the SQL Server, type the sa password. The installation requires this password to install and attach the Infor CRM SLX databases. ■ **SQL Server sysdba password** - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Infor CRM SLX database. ■ **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Infor CRM SLX. If you clear this option, set the information for the Infor CRM SLX Service user. ■ **Domain** - Type the network domain where you created the Infor Service user. ■ **User Name** - Type the name of the Infor Service user (for example, SLXService). ■ **Password** and **Confirm** - Type the Infor Service user's password. ■ Port **Change** button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. 9. On the remaining screens, click **Install** and **Finish** to complete the installation. **Note**: The installation process removes prior versions before installing the new applications. During this process, you may see the message "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click **OK** to continue the installation. 10. If prompted, restart your computer when the installation completes.
All Web	**19**	**Upgrade the Web Host** **Note**: To upgrade the Cache Server, see task 18: "Upgrade main office computer" installation. **To upgrade** 1. You must log on as the local administrator to install the Web components on each machine. 2. On the **Infor CRM SLX Installation** screen, click **Server Installation**. 3. On the **Server Installation** screen, click **Web Host on IIS**. **Note**: If the installation does not detect the necessary prerequisites, you

Required for	Task	Description
		will be prompted to install them. Installing prerequisites may require your computer to restart. ■ Click **Install** to allow Infor CRM SLX to install the required components. ■ Click **Cancel** to stop the installation. For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM SLX. 4. In the **Infor CRM SLX Web Host** message box, click **Yes**. 5. On the **Welcome** screen, click **Next**. 6. On the **Setup Type** screen, select an installation type, and then click **Next**. ■ Select **Complete** to install the Web Host. ■ Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 7. If you installed the Cache Server on a computer other than the Web Host, you must manually configure the web.config file to access the Cache Server computer. See the “Configuring the Infor CRM SLX Cache Server” topic in the Application Architect help for details 8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: ■ **Use an existing web site** - If you want the installation to use an existing Web site, click this button and select the Web site name. If you created an SData portal or Outlook sync in the Administrative Tools and Servers installation, you can select the existing Saleslogix Web site for the Web components. ■ **Create Web Site** – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals. ■ **Enter a Web site name** – Type the name of the Web site that will appear in IIS. The default name is Infor CRM SLX ■ **Port** – Enter the port number that the Infor CRM SLX Web site will use. Note the port number for future reference. You must use port number 1025 or greater. ■ **Domain** – Enter the network domain where you created the WebDLL user. ■ **User Account** – Enter the name of the WebDLL user you created. The default value is *WebDLL*. If you used a different name, type it exactly as you did when you created it. ■ **Password** and **Confirm Password** – Type the WebDLL user’s password. ■ **Configure Saleslogix Database** - Clear this check box if you do not want to connect to the database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled.

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Saleslogix Server – Select or type the name of the computer on which you installed the Saleslogix Server.
Saleslogix Database Alias – Select or enter the name of the connection to the Infor CRM SLX database.
Search for servers on port - Enter a port. By default, this is set to port number 1706.
User Name – Enter a Infor CRM SLX user name (such as Admin).
Password – Enter the Saleslogix Server password for the Infor CRM SLX user.

<ol start="9">
On the remaining screens, click Install and Finish to complete the installation.
Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.
If prompted, restart your computer when the installation completes

</td></tr>
<tr><td>All</td><td>20</td><td>
(Optional) Upgrade the Network Client
If the Infor CRM SLX Network Client is installed on your Administrative Workstation, run the Network Client installation to install the Client application.
To upgrade

Infor CRM SLX Installation browser > Client Installations> Install Network Client.
Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation.
In the Infor CRM Network Client message box, click Yes.
On the Welcome screen, click Next.
On the Setup Type screen, select an installation type, and then click Next.

Click Complete to install the most common components.
Click Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation.

On the remaining screens, click Install and Finish to complete the installation.
Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.
If prompted, restart your computer when the installation completes.

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<table>
<thead>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
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<tbody>
<tr><td>All</td><td>21</td><td>Start the Administrator

On the Start menu, expand Saleslogix, and then click Administrator.</td></tr>
<tr><td>All</td><td>22</td><td>Apply the Infor CRM SLX v8.5 to v9.0 Upgrade.sxb bundle

Use the Administrator to apply the Infor CRM SLX v8.5 to v9.0 Upgrade.sxb bundle.

See the “Installing a Bundle” topic in the Administrator Help for instructions.

This bundle is located in the Infor CRM SLX media, in the Upgrades folder and includes functionality formerly released in Updates. The bundle contents are outlined in Chapter 3, "Changes in this release".</td></tr>
<tr><td>All Web</td><td>23</td><td>Configuring Database Connections for Application Architect

Notes:

You may skip this step if you already performed this task in version 8.5.0.01.
Before proceeding, you may need to know the database server name or instance, database name, and the SYSDBA user password.

To add

Double-click the AppArchitect.exe.
On the Please log on... dialog box, click the Log on to ellipsis button.
Click the Add button.
On the Connection tab, enter the information needed.
<ol type="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.
Click the Provider drop-down arrow and select one of the following:

System.Data.SqlClient: 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.

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.
Click the Advanced tab and complete the Advanced tab information. For steps see the DataLink Manager help topic "Advanced Tab".
Click OK on the Data Link Manager dialog box to complete the new
</td></tr>
</tbody>
</table>

Required for	Task	Description
		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**.
All Web	**24**	**Update existing Application Architect projects** Open the Application Architect to update existing projects. All existing projects that you open in the Application Architect must be updated to the new v9.0 structure. This only changes the format of the project.xml file and some of the XML components. When opening a project created prior to version 9.0, you may be prompted to update the project format. **To update** 1. Open the Application Architect. 2. The Application Architect automatically opens the last project you were working with and the **Confirm Upgrade** dialog box opens. 3. Do one of the following: ▪ If you want to update the format of this project, click **Yes**. ▪ If you do not want to update the format of this project, and you want to choose a different project, click **No** and then open the project you want to update. 4. After updating the project, information about the update can be found in the Output Window.
All Web	**25**	**Copy the Web bundles to a local folder and ensure permissions** 1. On the install media navigate to the **Upgrades** folder. 2. Copy the following bundles and paste them in a local folder ▪ ICRM SLX v9.0 Web VFS.zip ▪ ICRM SLX v9.0 VFS Actions.zip ▪ Infor CRM SLX v9.0 SLXCustom.zip ▪ Oracle BOE.zip 3. Ensure the bundles are not blocked.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>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.
4. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.</td></tr>
<tr><td>All Web</td><td>26</td><td>Install the VFS bundle
Install the ICRM SLX v9.0 Web VFS.zip.
To install the bundle
1. Open the Application Architect.
2. On the View menu, click Bundle Manager.
3. Click Install.
4. Select File name, navigate to the folder where you saved the bundles in task 25 and select ICRM SLX v9.0 Web VFS.zip
5. On the Select Bundle screen, click Next.
6. Click Finish.</td></tr>
<tr><td>All Web</td><td>27</td><td>Rebuild the database schema
▪ On the Tools menu, click Rebuild Database Schema.</td></tr>
<tr><td>All Web</td><td>28</td><td>Install the Actions bundle
Install the ICRM SLX v9.0 VFS Actions.zip.
To install the bundle
1. Open the Application Architect.
2. On the View menu, click Bundle Manager.
3. Click Install.
4. Select File name, navigate to the folder where you saved the bundles in task 25 and select ICRM SLX v9.0 VFS Actions.zip
5. On the Select Bundle screen, click Next.
6. On the Release Plugins dialog box, click OK to release the plugins to Everyone
7. Click Finish.</td></tr>
<tr><td>All Web</td><td>29</td><td>Install the SLXCustom bundle
Install the Infor CRM SLX v9.0 SLXCustom.zip.
To install the bundle
1. Open the Application Architect.
2. On the View menu, click Bundle Manager.
3. Click Install.
4. Select File name, navigate to the folder where you saved the bundles in task 25 and select Infor CRM SLX v9.0 SLXCustom.zip
5. On the Select Bundle screen, click Next.</td></tr>
</table>

Required for	Task	Description
		6. Click **Finish**.
All Web	**30**	**Install the Oracle BOE bundle** For Oracle and Back Office Extension enviornments only Install the Oracle BOE.zip. **To install the bundle** 1. Open the **Application Architect**. 2. On the **View** menu, click **Bundle Manager**. 3. Click **Install**. 4. Select **File name**, navigate to the folder where you saved the bundles in task 25 and select **Oracle BOE.zip** 5. On the **Select Bundle** screen, click **Next**. 6. Click **Finish**.
All	**31**	**Run the Infor CRM v9.0 Conversion Utility** **Note:** Unless otherwise noted, each Conversion Utility action should be executed only once. If you previously ran any of these actions during an 8.5 update, you do not have to select and run that action again. The Conversion Utility is required under the following circumstances: ■ All upgrades ■ Back Office integrated environments with Master Data Consolidation enabled that are upgrading from 8.4.0.04 must run the Conversion Utility with Master Data Consolidation selected in order to update the SLXLocation. **Note:** No-integrated or integrated environments without Master Data Consolidation upgrading from 8.4.0.04 do not need to run the conversion utility. The Conversion Utility contains the following important actions: ■ **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. This option depends upon setting the Isolate Content by Logical ID custom setting equal to True. ■ **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**

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>
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.

Set the new ClosedDate to when Quotes and Sales Orders were closed
This option populates the new ClosedDate field in the SALESORDER and QUOTE tables for any quotes or sales orders with a status of Closed, or a “like Closed” status.

For non-integrated environments the ModifyDate is used.
For Back Office Extension integrated environments the ErpStatusDate,or if ErpStatusDate is null, then the ErpDocumentDate is used.
This option supports the new Quote and Sales Order List view KPIs. If this option is cleared, and the ClosedDate remains empty, then some time-based KPIs will not have valid historical data until new data is created.

The conversion utility also makes the following non-optional change:

Updates the Ticket SumTicketActivityElapsedUnits rollup property used in Ticket List view KPIs.

To run the conversion utility

On the Administrative Workstation, browse to the ConversionUtility.config file.
By default, this is in \Program Files (x86)\Saleslogix.
Open ConversionUtility_9.0.exe.config with the text editor of your choice.
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""/>
Double click the ConversionUtility_9.0.exe application.
In the Conversion Utility interface, clear any actions you do not want to run and click Update.

</td></tr>
<tr><td>All Mobile</td><td>32</td><td>Install the Mobile VFS bundle
Install the ICRM SLX Mobile v4.3.0 for 8.5 and later VFS.zip.</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>To install the bundle
Open the Application Architect.
On the View menu, click Bundle Manager.
Click Install.
Select File name, navigate to the folder where you saved the bundles in task 25 and select ICRM SLX Mobile v4.3.0 for 8.5 and later VFS.zip
On the Select Bundle screen, click Next.
Click Finish.</td></tr>
<tr><td>All Mobile</td><td>33</td><td>Verifying the Port and App Pool are set

Failure to set the Port and App Pool settings for your Mobile portal can cause the site to function as a virtual directory instead of an application. To prevent this, verify that the Port and App Pool are set before deploying the portal.

To verify the Port and App Pool
In the Application Architect View menu, click Deployment Explorer.
Expand Deployments, and then double-click the Mobile Portal.
If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click OK.
In the Deployment Targets tree view, click IIS.
The IIS Target Settings appear.
In the Port box, ensure that the port number for your Web Host server displays.
It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333.
In the App Pool box, ensure that the name of the application pool for your Web site displays.
This name corresponds to the associated application pool for your Web site. For example, if you used the default Infor CRM Web site, the App Pool is Saleslogix.

For more information about setting the Port and App Pools, see Infor CRM Implementation Guide.</td></tr>
<tr><td>All Mobile</td><td>34</td><td>Enable multi-currency on the Mobile Client

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

Multi-currency is disabled by default. To enable Multi-currency, you must copy a setting from the products/argossaleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal.

If you make your edit in the products/argossaleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.

To enable multi-currency on the Mobile Client
Open the Application Architect.
Open the Project Explorer and expand the VFS folder.
Expand the Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration.</td></tr>
</table>

Required for	Task	Description
		4. Double-click **production.js**. 5. Locate **@property {Boolean} enableMultiCurrency**. 6. Remove the comment tag (//) and change the setting from 'false' to **true**.This must also be configured properly on the SData server. 7. In the Application Architect toolbar, click the **Save All** icon.
All Mobile	**35**	**Changing the warehouse mode in the Mobile Client** Available to Promise enables users to see if there is stock on hand. If your implementation includes an integration with a back office that uses a specific warehouse location for the Available to Promise feature, you can enable users to check each warehouse inventory manually. Warehouse mode is disabled by default. To enable Warehouse mode, you must copy a setting from the products/argos-saleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal. If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade. **To change the warehouse mode** 1. Open the **Application Architect**. 2. Open the **Project Explorer** and expand the **VFS** folder. 3. Expand the **Portal Manager**, **Saleslogix Mobile Portal**, **SourceFiles**, **Products**, **argos-saleslogix**, **configuration**. 4. Double-click **production.js**. 5. Locate "**warehouseDiscovery**". 6. Remove the comment tag (//) and change the setting from 'auto' to **manual**. 7. In the Application Architect toolbar, click the **Save All** icon.
All Mobile	**36**	**Enable Offline Support in the Mobile Client** Offline support allows read-only access to select records and entities when a user's device is offline or loses connectivity. Offline support is disabled by default. To enable offline support, you must edit the products/argossaleslogix/ configuration/production.js file before deploying the portal. If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade. **To enable offline support** 1. Open the **Application Architect**. 2. Open the **Project Explorer** and expand the **VFS** folder. 3. Expand the **Portal Manager**, **Slx Mobile Portal**, **SourceFiles**, **Products**, **argos-saleslogix**, **configuration**. 4. Double-click **production.js**.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td>5. Locate "enableOfflineSupport.
6. Remove the comment tag (//) and change the setting from 'false' to true.
7. In the Application Architect toolbar, click the Save All icon.</td></tr>
<tr><td>All web</td><td>37</td><td>Build and deploy the portals
You must verify the build path prior to building.
Note: This step is strongly recommended for customized environments to establish a functioning Web Client before adding customizations.
To build and deploy
1. In the Application Architect, on the Tools menu, click Build Settings.
2. In the Build Search Path, verify that the path is set to: %BASEBUILDPATH%\assemblies;%BASEBUILDPATH%\interfaces\bin; %BASEBUILDPATH%\forminterfaces\bin
3. If you needed to edit the path, you must also clear the output folders.
■ On the Build menu, click Clean Build Folders.
4. On the Build menu, click Build Web Platform.
5. When the build has completed, on the View menu, click the Deployment Explorer.
6. Expand Deployments and double-click Core Portals .
7. Click the Deploy All button.
Note: “Be sure to deploy the Mobile portal if your installation includes the Infor CRM Mobile Client.</td></tr>
<tr><td>All</td><td>38</td><td>Reset IIS
1. Close the Application Architect.
2. Stop and restart all Infor CRM SLX services.
3. Reset IIS.</td></tr>
<tr><td>Web - Optional</td><td>39</td><td>Enable HTTP Compression
If your Web site(s) will use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.
You must be a member of the Administrators group on the local computer to enable compression.
Enabling dynamic compression will provide significantly smaller files over the network. In addition, there are a number of configuration elements that may be modified to provide more benefits. You may need to try different settings to achieve optimum results.
The following information can be used as a guide to implement compression in your Infor CRM implementation. To help evaluate and test your specific compression settings, you may want to use a third-party HTTP compression debugging tool.
To enable
1. Open IIS Manager, and select your Infor CRM SLX Web site.</td></tr>
</table>

Required for	Task	Description

		2. Under **IIS**, double-click **Compression**.
		3. Select the **Enable dynamic content compression** check box.
		4. If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box.
		5. In the **Actions** pane, click **Apply**.
		6. If necessary, modify the **ApplicationHost.config** file using the following example.
		This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.
		IMPORTANT: Use the 64 bit version of a text editor (e.g. Notepad.exe) when editing ApplicationHost.config; otherwise, when using a 32 bit version of a text editor the file save will be redirected to %SystemRoot%\SysWow64\inetsrv\config\applicationHost.config and the compression settings will not take effect. The following command line can be used to edit the applicationHost.config file correctly:
		"%WinDir%\Notepad.exe" "%SystemRoot%\System32\inetsrv\config\applicationHost.config"
		
		Note: See the Microsoft IIS Web site at https://www.iis.net/ConfigReference for documentation regarding the settings below
		
		Example Configuration Settings:
		`<httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files" maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false" >`
		`<scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10"/>`
		`<scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10" staticCompressionLevel="10" />`
		`<staticTypes>`
		`<add mimeType="text/*" enabled="true" />`
		`<add mimeType="message/*" enabled="true" />`
		`<add mimeType="application/*" enabled="true" />`
		`<add mimeType="*/*" enabled="false" />`
		`</staticTypes>`
		`<dynamicTypes>`
		`<add mimeType="text/*" enabled="true" />`
		`<add mimeType="message/*" enabled="true" />`
		`<add mimeType="application/*" enabled="true" />`
		`<add mimeType="*/*" enabled="false" />`
		`</dynamicTypes>`
		`</httpCompression>`
		`</Quote>`
		The following script will enable both static and dynamic compression based on the Infor CRM Implementation Guide recommendations:
		`REM staticTypes`

Required for	Task	Description
		%windir%\System32\inetsrv\appcmd set config - section:system.webServer/urlCompression /doStaticCompression:"True" /commit:apphost REM Clear the staticTypes section %windir%\System32\inetsrv\appcmd clear config - section:system.webServer/httpCompression /"staticTypes" /commit:apphost REM <add mimeType="text/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes.[mimeType='text/*',enabled='True']" /commit:apphost REM <add mimeType="message/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes.[mimeType='message/*',enabled='True']" /commit:apphost REM <add mimeType="application/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes. [mimeType='application/*',enabled='True']" /commit:apphost 7. Save your changes.
	40	**Next Steps:** If your installation includes customizations proceed to the next section "Re-applying your customizations": ■ Network Client, proceed to task number 41. ■ Web Client, proceed to task number 42. ■ Mobile Client, proceed to task number If your installation does not include customizations, you may proceed to one of the following the sections : ■ If your implementation includes remote offices or remote users, proceed to "Upgrading synchronization" on page 26. ■ If your implementation does not include remote offices or remote users, proceed to "Upgrading Web Clients" on page 27.

Re-applying your customizations

These tasks detail merging your preserved customizations with the new changes provided in the Infor CRM v9.0 upgrade. If your installation does not include customizations to the Network Client, Web Client or Mobile portal, you can safely omit this section and continue to the next section, "Upgrading synchronization" on page 26.

Required for	Task	Description
Customized Network	**41**	**Apply Network Client Customizations** Apply the changes listed in Chapter 3, "Changes in this release" on page 57. You can use one of the following strategies: ▪ Add your customizations to the Infor CRM SLX plugins (recommended). ▪ Add the Infor CRM SLX changes to your custom plugins. After applying plugin changes, release the appropriate plugins using Architect. See the “Release a Plugin for Use” topic in the Architect Help for information on releasing plugins.
Customized Web	**42**	**Merge Web Client Customizations** **Note**: If you have not customized your Web implementation, disregard this task and proceed to task , "Merge Mobile Customizations" . Use the Application Architect to merge or discard differences between custom and core forms. 1. In Application Architect , on the **Tools** menu, click **Manage Customizations**. 2. Filter the list by Out of Sync Equal to True. 3. Use the first two columns to perform one of the following actions for each file. ▪ **Merge** – Opens the specified differencing utility and allows you to view and resolve the differences between the two file versions. **Note:** You must first set the Differencing Tool . On the Tools menu, click Set Differencing Tool opens the Set Differencing Utility. ▪ **Ignore** – Acknowledges the difference and will exclude this file from being flagged as out of sync going forward. 4. Repeat for each out of sync file. 5. When finished close the dialog box.
Customized Web	**43**	**Move custom style classes to the SLXCustom.css** As of version 9.0, all .css customizations need to reside in the new SLXCustom.css file found in the Portal Manager/SlxClient/SupportFiles/css **Note**: Do not proceed with this task unless you have installed the Infor CRM SLX v9.0 SLXCustom.zip bundle in task 1. In Application Architect, open **Project Explorer**, expand **Portal Manager**, and then browse to **SlxClient/SupportFiles/css**. 2. Open your custom .css file and copy everything in your customized .css file. 3. Double-click the **SlxCustom.css** file. 4. In the **SlxCustom.css** file, paste the contents copied from your custom .css file 5. Repeat steps 2-4 for any additional custom .css files. 6. In the SlxCustom.css file save your changes. 7. Delete your custom .css files from **Portal**

Required for	Task	Description
		Manager/SlxClient/SupportFiles/css 8. Scroll to **SageStyles.jsb**, right-click the file and select **Delete**. 9. If prompted click **OK** to confirm the deletion.

Customized Web	**44**	Move custom dojoConfig paths from the core.master to the main.js
		As of version 9.0, all .js customizations need to be referenced in the new main.js file found in the Portal Manager/SlxClient/SupportFiles/jscript/SLXCustom
		Note: Do not proceed with this task unless you have installed the Infor CRM SLX v9.0 SLXCustom.zip bundle in task 29.
		1. Find your core.master customizations
		a. Browse to SlxClient/SupportFiles/Masters.
		b. Open your custom core.master file.
		c. Find the dojoConfig paths.
		2. Recreate the dojoConfig paths in the main.js file.
		a. Browse to SlxClient/SupportFiles/jscript/SLXCustom
		b. Double click the main.js file.
		c. Recreate the dojoConfig paths from the core.master file using the following format:
		], Function () {
		require({
		paths:
		{MyPath: "/../../jscript/MyPath"
		}
		});
		});
		Note: Only your customizations path should be added here. Do not add a path for 'Sage'.
		d. Save your changes.
		Note: If all customizations are created in the SlxClient/SupportFiles/jscript/SlxCustom folder you will not have to specify a path in the main.js file.
		3. Browse back to SlxClient/SupportFiles/Masters, right-click your custom core.master file and select **Delete**.
		4. If prompted click **OK** to confirm the deletion.

Customized Web	**45**	**Opt-in to apply new styling to custom or customized forms** Custom or customized forms will not automatically inherit the new user interface styles implemented in version9.0. **To apply the new styles to custom forms** 1. In Application Architect, in the **Project Explorer**,open the custom or customized form you want to inherit the styles. 2. In the **Properties** view, under **Appearance**, select **Style Scheme** and type **opt-in**. 3. Repeat for each form you want to apply the new styles.

Required for	Task	Description
Customized Web	**46**	**Review Breaking Changes** If you have custom code, review the list of breaking changes to the Infor CRM SLX API and change references to classes and members in your custom code as appropriate. Breaking code changes are identified in Chapter 3, "Changes in this release" on page 57.
Customized Mobile	**47**	**Merge Mobile Customizations** Recreate your Mobile customizations by merging in the customizations you recorded in task 5.
All Web - Recommended	**48**	**Import your upgraded project to the VFS.** After upgrading, you may want to import your upgraded project (stored locally) to the Virtual File System (containing the older project). This ensures the project in the VFS is the most recent version. For detailed steps to import the project, see the “Importing from Another Project” topic in the Application Architect Help.
Customized Web	**49**	**Build and Deploy Web Portals** Use the Application Architect to build and deploy the appropriate Web portal(s). Use the Rebuild Web Platform option on the Build menu when upgrading existing portals. See the “Rebuilding the Web Platform” and “Deploying Portals” topics in the Application Architect Help for instructions. Offline Web Clients must be deployed using the Virtual File System (VFS). Deployments created from a local file system are not supported and will not function correctly.

Upgrading synchronization

Required for	Task	Description
Remotes	**50**	**Upgrade Synchronization Server** If you did not upgrade the Synchronization Server(s) in task 18, do so now.
All	**51**	**Restart the Sync Service(s).** Restart the Sync Service for each Sync Server.

Upgrading Clients and Remote Offices

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

Upgrading Web Clients

Required for	Task	Description
Web Client	**52**	**Instruct Users to Sign in to the Web Client** If necessary, send the Web Client URL to users through email. Your users can click the URL or type it into a compatible browser on a desktop computer. Instruct users to clear the browser's cache. Users should refer to the browser's instructions for clearing the cache. Instruct Web Client users to sign in to the updated Web Client portal. No additional tasks are required. if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38.

Upgrading Network Clients

Required for	Task	Description
Network Client	**53**	**Install the Network Client** Run the Infor CRM Network Client installation on each of your Network user’s computers. 1. Infor CRM SLX Installation browser > **Client Installations**> **Install Network Client**. **Note**: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation. 2. In the Infor CRM Network Client message box, click **Yes**. 3. On the **Welcome** screen, click **Next**. 4. On the **Setup Type** screen, select an installation type, and then click **Next**. ■ Click **Complete** to install the most common components. ■ Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 5. On the remaining screens, click **Install** and **Finish** to complete the installation. **Note**: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. 6. If prompted, restart your computer when the installation completes. If you are upgrading an installation that included Infor CRM SLX Xbar for Microsoft Outlook, see "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38.

Upgrading Mobile Clients

Required for	Task	Description
Mobile Client	**54**	**Send Mobile URL to Users** If necessary, send the Mobile Portal URL to Users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed. For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile. The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.

Upgrading Remote Users and Offices

Required for	Task	Description
Remote Users and Remote Offices	**55**	**Create a Remote User or Remote Office Database** In Infor CRM v9.0, 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. **Task 1 - continued**

Required for	Task	Description
		Task 55 - continued 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.
Remote Office	**56**	**Upgrade the Remote Office** Upgrade the Remote Office by running the Remote Office installation package. **To install** 1. On the **Infor CRM SLX Installation** screen, click **Server Installation**. 2. On the **Server Installation** screen, click **Remote Office Server**. 3. On the **Welcome** screen, click **Next**. 4. On the **Setup Type** screen, select an installation type, and then click **Next**. ■ Select **Complete** to install all components on this computer. ■ Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation. 5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: ■ **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Infor CRM SLX. ■ **Domain** - Type the network domain where you created the Infor CRM Service user. ■ **User Name** - Type the name of the Infor CRM SLX Service user (for example, SLXService). ■ **Password and Confirm** - Type the Infor CRM SLX Service user's password. ■ Port **Change** button - Changes the port number used for communication between the Clients and Infor CRM Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. ■ **Configure IIS for the Web Server** - Select this check box if your installation includes the Infor CRM Client and\or SData portals. This makes necessary modifications to IIS. 6. On the remaining screens, click **Install** and **Finish** to complete the installation.
Remote Users	**57**	**Deploy the SData portal to Remote Client users.** In version 9.0, Infor CRM SLX Remote Network Client users require an SData portal to enable support for such features as Infor CRM SLX Xbar for Microsoft Outlook. Use the Application Architect to deploy this portal to the appropriate users.

Required for	Task	Description
		To deploy 1. On the Application Architect **View** menu, click **Deployment Explorer**. 2. In the **Deployments** tree view, double-click **Windows Remote Clients**. 3. In the **Deployment Targets** pane, click **Remote Users**. The Remote User Target Settings appear. 4. In the **Remote User Target Settings** pane, click **Add**. 5. In the **Select Remote User(s)** dialog box, select the names of the users who need to access the SData portal. 6. Click **OK**. 7. Ensure the **Deploy Portal** check box is selected. This indicates the portal is active and should be deployed. 8. Click **Save**. 9. Click **Deploy**. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.
Offline Web Client	**58**	**Deploy Web portals to Offline Web Client users.** Use the Application Architect to deploy the Infor CRM Web portals. The Web Portals are: ■ SlxClient ■ SData ■ SlxJob Service **To deploy** 1. On the Application Architect **View** menu, click **Deployment Explorer**. 2. In the **Deployments** tree view, double-click **Remote Sales Client**. 3. In the **Deployment Targets** pane, click **Remote Users**. The Remote User Target Settings appear. 4. In the **Remote User Target Settings** pane, click **Add**. 5. In the **Select Remote User(s)** dialog box, select the remote users who will receive the Offline Web Client deployment. 6. Click **OK**. 7. On the **SlxClient** tab: a. In the **Virtual Directory** box, type the alias name for the virtual directory. By default, the Virtual Directory is SlxClient. b. In the **Port** box, type the port number for the Web site. The Infor CRM Web Server requires its own port for each portal instance. The port for each portal must be unique. c. Ensure the **Deploy Portal** check box is selected. This indicates the portal is active and should be deployed. 8. Click **Save**. 9. Click **Deploy**. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register

Required for	Task	Description
		the site with a personal server instance.
Remote Offices	**59**	**Deploying the Web Portals for the Remote Office** Remote Offices can support both Windows Network Client users and Web Client users. Each type of user requires that you use the Application Architect installed at the main office to deploy the relevant portal(s). For the Web Client user, the required portals are: ■ SlxClient ■ SData ■ SlxJob Service For the Windows Network Client, the required portal is: ■ SData **To deploy portals for the Web Client user** 1. On the Application Architect **View** menu, click **Deployment Explorer**. 2. In the **Deployments** tree view, double-click **Remote Sales Client**. 3. In the **Deployment Targets** tree view, click **Remote Office(s)**. 4. The Remote Office Target Settings appear. a. In the **Server** box, type the name of your Web Host server. If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server. b. Ensure the **Deploy Target** check box is selected. This indicates the target is active and should be deployed. c. In the **Port** box, type the port number for your Web Host server. It must match the port for the Web site. d. In the **App Pool** box, type the name of the application pool for your Web site. For example, if you used the *Saleslogix* Web site, the App Pool is *Saleslogix*. 5. In the **Company Name** list, select the Remote Office(s) to which you want to deploy the Web Client. 6. Select the tab for the SData portal. a. In the **Virtual Directory** box, type the alias name for the virtual directory. b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory. c. Ensure the **Deploy Portal** check box is selected. This indicates the portal is active and should be deployed. **Note:** When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal. 7. Click **Save**. 8. Do one of the following: a. Click **Deploy** to deploy portals individually. b. Click **Deploy All** to deploy all portals in the Remote Office.

Required for	Task	Description
		Task 59 - continued The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, the portals are deployed to the remote.
All Remotes	**60**	**Running a Synchronization Cycle** After deploying the Web site, a synchronization cycle must run to deploy the portal to remotes. Synchronization is set to run automatically every 30 minutes. You can run a manual synchronization cycle immediately or wait for an automated cycle to complete.
Web Remotes	**61**	**Installing the Offline Web Client** Users do not need administrator rights to install or run the Offline Web Client. However, the Offline Web Client installation installs third-party prerequisites if they are not detected on the user's computer. Administrator rights are required to install the following: **Note:** Internet access to Microsoft.com is required to install some of these options. ■ Windows Installer 4.5.1 ■ Microsoft SQL Express2012 ■ .Net Framework 4.8 ■ .Net Framework 4.8 Developer Pack ■ Microsoft SQL 2005 Backwards Compatibility ■ .Net AJAX Extensions You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Infor CRM SLX installation. **Installing Without Administrator Rights** To install the Offline Web Client without administrator rights, ensure you have installed all the prerequisites listed in the previous section. If the Offline Web Client installation does not detect the necessary prerequisites and the user running the installation does not have administrator rights, the Offline Web Client installation will not complete. **Installing With Administrator Rights** To install the Offline Web Client and the required prerequisites, you must grant the user administrator rights for the computer on which you are installing Infor CRM SLX. See your Microsoft documentation for instructions on granting administrator rights using one of the following options: ■ Add each user to the local machine's Admin group for the duration of the implementation. ■ Use a domain user account that is a member of the domain admin group for the duration of the implementation. **To install** 1. On the **Infor CRM SLX Installation** screen, click **Client Installation**s. 2. On the **Client Installation** screen, click **Install Offline Web Client**. 3. On the **Welcome** screens, read the information and then click **Nex**t. 4. On the remaining screens, click **Install** and **Finish** to complete the installation

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Users and Offices</td><td>62</td><td> Distribute Client Installations to you Remote users and Offices You can distribute a copy of the Infor CRM SLX media </td></tr>
<tr><td>Remotes</td><td>63</td><td> Instruct Remote users to upgrade the Infor CRM Client. Remotes should upgrade using the Remote Client installation on the Infor CRM SLX media. To upgrade In the Install browser (Setup.exe) click Client Installations> Install Remote Client.
Note: If the installation does not detect the necessary prerequisites you will be prompted to install them. Installing prerequisites may require your computer to restart.
Click Install to allow Infor CRM SLX to install the required components
Click Cancel to stop the installation.
For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.
On the Welcome screen, read the information then click Next.
On the Setup Type screen, select an installation type, and then click Next.
Select Complete to install all components on this computer.
Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation.
On the remaining screens, click Install and Finish to complete the installation.
Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.
If prompted, restart your computer when the installation completes. Note: If you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38 </td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Remote Users and offices, Offline Web Client users</td><td>64</td><td>Install the Remote Database

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

The connection contains the following values:
The Database Name is set to SLXRemote.
The Server Name is set to the name of the Remote user’s computer.
The User name is set to sa.
The sysdba password is set to Ma$t3rk3y.
When attaching the remote database, if the sysdba user does not exist, the user is created with a password set to Ma$t3rk3y. If the sysdba user already exists in the remote Microsoft SQL instance, then the sysdba user’s password remains unchanged. However, the database installation sets the sysdba password in the Connection Manager to Ma$t3rk3y. Therefore, if the sysdba password on the remote database is set to a value other than Ma$t3rk3y, the Remote user must open the Connection Manager and change the sysdba password to the value in their database.</td></tr>
<tr><td></td><td></td><td>Task 64 - continued

To install
Browse to the location of the Remote user database.
For Remote Users and Offline Web Client users, the database file name is SLX_userid_dat.sxd.
For Remote Offices, the databases the database file name is SLX_sitecode_dat.sxd
Double-click the Remote database.
In the Remote Database Setup dialog box, click OK.
In the Infor CRM Attach Remote dialog box click OK to confirm a successful installation.

If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the ‘Select the name of the SQL instance to use’ dialog box.

The Attach Remote utility assumes the sa password is SLXMa$t3r. If you did not install Microsoft SQL Express using the Infor CRM installation, you may have to change the sa password in the Remote Database Setup dialog box before the database can be successfully attached.</td></tr>
<tr><td>Remote Users and offices, Offline Web Client users</td><td>65</td><td>Run a Synchronization Cycle

Users must run a synchronization cycle before they can log on to the Web Client. The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.

To run
On the Start menu, expand Saleslogix, and then click Synchronization Client.
Log on using your Infor CRM user name and password.
Click Sync Now.</td></tr>
<tr><td>Web Remotes</td><td>66</td><td>Signing in to the Web Client</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td></td><td> After running a synchronization cycle to set up the portal, users can sign in to the Web Client using the system tray icon. First, instruct users to clear the browser's cache. Users should refer to the browser's instructions for clearing the cache. To log on Right-click the system tray icon, and then click Open Site.
Log on using the standard Web Client log on screen</td></tr>
<tr><td>Remote Office</td><td>67</td><td> Populate views for the Remote Office Web Client In a Remote Office environment, sign into the Infor CRM LAN Client once before signing into the Infor CRM Web Client. This allows some views in the Web Client database to populate correctly. If you do not sign into the LAN Client before signing into the Web Client, an error will appear when attempting to open the Detail dialog caused by the missing database views. </td></tr>
<tr><td>Remote User</td><td>68</td><td> Start the Remote Client After installation, the user who installed Infor CRM must log on to the Client computer(s) for the first time and launch various applications. This process creates the necessary registry entries for each application and creates a connection to the Remote database. If the standard user does not have rights to install Infor CRM, an admin user must start the Client application. If the standard user has installation rights, he/she can simply log on and begin using Infor CRM. The Infor CRM Client must write to restricted areas of the registry. Therefore, once an admin user has logged on to the Client, a standard user can read from the registry’s restricted area. To start On the Start menu, expand Saleslogix, and then click Infor CRM Client.
In the Please log on dialog box:<ol type="a">
Type your Username and Password.
In the Log on to box, ensure the correct database connection name displays (for example, SLXRemote).
Click OK.
(Optional) Configure synchronization of the Remote user’s database to run automatically when the user is logged on to the main office database. For more information on automated synchronization, see the “Infor CRM Synchronization Client” topic in the Infor CRM Client Help. </td></tr>
<tr><td></td><td>69</td><td> Creating a SpeedSearch Schedule You can set a schedule on the Remote user’s computer to determine when SpeedSearch indexes are run. If a schedule is not set and your Host updates indexes when the Remote computer is turned off, the indexes on the Remote are updated when the user starts their computer. This update may delay the user as he/she cannot immediately start their work. To create On the Infor CRM Client Tools menu, click SpeedSearch Options.
In the Index list, select the index(es) for which you want to set a schedule.
In the Full Update section, select the date and time you want the index(es) to complete a full update.</td></tr>
</table>

Required for	Task	Description
		4. In the **Daily Update** section, select how you want to schedule daily incremental updates. ■ **When Infor CRM Opens** - All enabled indexes are updated when you open the Infor CRM Client. ■ **When Infor CRM Closes** - All enabled indexes are updated when you close the Infor CRM Client. ■ **Once at** - Select the time of day that you want to update all enabled indexes. ■ **Repeat Every** - Select or type how often you want all enabled indexes to be updated. 5. Click **OK**.
Remotes	**70**	**Instruct Remote users and Remote Offices to log on to the Synchronization Client and sync immediately after upgrading.** Ensure Remote users and Offices enable “Apply Changes” during the synchronization cycle.
Remotes	**71**	**Cycle the Synchronization Server** Cycle your Synchronization Server(s) so changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription. See the “Creating a Custom Sync Cycle” topic in the Administrator Help for more information.

Additional Web Client upgrade tasks

Required for	Task	Description
Web with ION Workflow enabled	**72**	**Review Active ION Workflows** Review which ION Workflows should be marked as Active. **To review the Active state of ION Workflow** 1. In the Web Client, Administration, Integrations, select **ION Workflow**. 2. Click the **Workflows** tab. 3. Uncheck the **Active** checkbox for any workflow that you do not want as active.
All Web	**73**	**Instruct Web Client and Offline Web Client users to download Mail Merge for Microsoft Word** Mail Merge for Microsoft Word allows users to manage mail merge templates and complete mail merges in Microsoft Word. **Note**: Outlook Integration (Send to CRM and Record to History) functionality is delivered with Xbar. See "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38. **To install and configure** 1. Sign in to the **Infor CRM Web Client.** ■ For Web Client users, open the Infor CRM SLX Web site. ■ For Offline Web Client users, in your System Tray, right-click **Personal Web Server**, point to **SlxClient**, and click **Open Site**.

Required for	Task	Description
		2. Expand the **Tools** menu and then click **Options**. 3. Click the **General** tab, and then click **Install Mail Merge for Microsoft Word**. 4. Follow the installation instructions on screen. You must be a Power User or Admin user to install Outlook Integration.
All Web	**74**	**Clear the web browser's cache** Before logging into the upgraded Web Client, instruct users to clear the cache of the web browser. For detailed steps, please refer to your browser's help.
Web Client (optional) Customer Portal (optional)	**75**	**Re-configure Password Self-Service** Password self-service is available for the Infor CRM Web Client and for the Customer Portal. This feature allows users to reset their own passwords and request their usernames. If your installation included Password Self-service and you want to continue to use it, you must reconfigure it now. The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file. When editing the appSettings.config file, be sure to do so in the VFS. If you edit in in the file system, your changes may be overwritten if the appSetting.config file is redeployed. **To turn password self-service on** 1. Open the **Application Architect** and expand the **Project Explorer.** 2. Expand **Portal Manager>SlxClient>Support Files**, and then double-click **appSettings.config**. 3. Scroll through the file to locate "**Defines the settings for sending email**". 4. Edit using the instructions in the appSettings.config file for guidance. 5. Save your edits. 6. Deploy the SlxClient portal. 7. If necessary, repeat these steps to turn Password Self-service on for the Customer Portal. **Note:** To use such email services as Gmail and Hotmail, the enableSSL setting must be set to True both in the appconfig settings and also on the mail service being used.

Configuring Optional Features

This section addresses steps for configuring optional features available in Infor CRM SLX v9.0.

Upgrading Infor CRM SLX Xbar for Microsoft Outlook

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

Required for	Task	Description
Infor CRM SLX Xbar for Microsoft Outlook	**76**	**Enable users to install Infor CRM SLX Xbar for Microsoft Outlook.** Infor CRM SLX Xbar for Microsoft Outlook must be installed on each user’s machine. In most cases, the user performs the installation him or herself. To enable the installation to be successful, the Administrator must do the following: ▪ Ensure users have the correct role. Each Xbar user must have been assigned the Standard User Role in the Core product. For information on assigning user roles, see the topic called "User Detail View" in the Web Client help. ▪ Ensure that users have Power User rights or greater for their computers.
Infor CRM SLX Xbar for Microsoft Outlook	**77**	**Copy the Infor CRM SLX Xbar Setup.exe set up files to the location where it can be accessed by your users** The Infor CRM SLX Xbar Setup.exe is provided on the Infor CRM SLX media. To make the install available, do the following: ▪ Infor CRM SLX Web Client users install Infor CRM SLX Xbar from the Web Client Tools, Options, General tab, where there is an **Install Xbar for Outlook** button. To enable this button to function correctly you must copy the Infor CRM SLX Xbar Setup.exe to C:\inetpub\wwwroot\SlxClient\Libraries\DesktopIntegration. ▪ Infor CRM SLX Windows Network Client users must manually launch the setup.exe. Copy the Infor CRM SLX Xbar Setup.exe to a convenient location and share that location with your Network Client users.

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td>Infor CRM SLX Xbar for Microsoft Outlook</td><td>78</td><td>Provide users with instructions for installing Xbar
Provide your Infor CRM SLX Web Client users with the following installation instructions:
Infor CRM SLX Web Client users
1. Sign in to the Infor CRM SLX Web Client, expand the Tools menu and then click Options.
2. Click the General tab, and then click Install Xbar for Outlook.
3. Follow the installation instructions on screen.
Infor CRM Windows Client user
1. Browse to the location provided by your Infor CRM SLX Administrator and copy the Infor CRM SLX Xbar Setup.exe to any convenient folder.
2. Click Infor CRM SLX Xbar Setup.exe , and then click Install.</td></tr>
<tr><td>Infor CRM SLX Xbar for Microsoft Outlook</td><td>79</td><td>Providing connection credentials
Users will require connection strings, user names, and passwords to be able to successfully sign into Xbar. Share the following information with each of your Xbar users:
■ User Name: Type your username. This is the username you use to log on to the CRM Clients.
■ Password: Type your password. This is the password you use to log on to the CRM Clients.
■ Service URL: This is the URL for your SData portal. For example: http://web.address.com/Sdata.
■ Client URL: This is the URL for your Windows or Web Client. For example, http://web.address.com/SLXClient.
The first time Microsoft Outlook is opened after installing Infor CRM SLX Xbar, each user will be invited to configure the Outlook Connector. Instruct users to follow the instructions in the Online Help topic provided.</td></tr>
</table>

Upgrading Infor CRM SLX Back Office Extension

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

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

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

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

Required for	Task	Task Description
Back Office Extension integration	**80**	**Ensure that Infor CRM SLX v9.0 has Multicurrency enabled** See the topic called “Managing Currency” in the Administrator help file for more information. The currency code must match your ERP base currency.
Back Office Extension integration	**81**	**Ensure that the Infor CRM SLX Mobile Client has Multicurrency enabled** If your implementation includes the Mobile Client, ensure you have enabled multi-currency on the Mobile Client as detailed in task 34 of "Upgrading your core components".
Back Office Extension integration	**82**	**Upgrade the BOD pack bundles.** BODS are Business Object Documents. They are the Infor ION messages that enable exchange of information between a supported ERP system and Infor CRM. Infor provides a BOD pack specific to each integration. For a full discussion of BODs, see the *Infor CRM Back Office Extension Configuration Guide* appendix named “BOD overview”. **To upgrade an existing BOD Pack bundle** 1. From the product media, BOD Packs folder, copy the version of the BOD pack bundle that matches your ERP system and paste it to a convenient location. For example, if your ERP system is LN, use the BOD pack named Infor CRM VFS BOE Pack LN 9.0.zip. 2. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties. 3. In the **Application Architect,** in the **Project Explorer,** right-click the project, and then click **Install Bundle**. 4. Navigate to the folder where you copied the BOD Pack.zip, and then click **Open**. 5. On the **Select Bundle** screen, click **Next.** 6. On the **Select Items** screen, ensure the **Portals** option is selected. 7. Click **Next**, and then click **Finish**.

Required for	Task	Task Description
Back Office Extension integration	**83**	**Implement new IOBOX optimization scripts.** Review and implement the new IOBOX optimization scripts presented in the *Infor CRM Back Office Extension Configuration Guide for Infor ION*, Chapter 4, Defining the Infor CRM IOBOX."
Back Office Extension integration	**84**	**If necessary, create and customize your own BODs using AnyBod.** For more information, see the documents called *Infor CRM Back Office Extension Customization User Guide* and *Infor CRM Back Office Extension Configuration Guide for Infor ION*. Both documents are available from the Infor Support Portal on the Infor Concierge web site: https://concierge.infor.com/.
Back Office Extension integration	**85**	**(Optional) Customizing your Back Office Extension configuration.** If necessary, you can customize your Back Office Extension implementation. See the documents called *Infor CRM Back Office Extension Customization Guide* and *Infor CRM Back Office Extension Configuration Guide for Infor ION*.
Back Office Extension integration	**86**	**(Optional) Enable Normalized Base Currency.** The Normalize Base Currency feature enables capturing transactions in varying currencies from multiple back offices or accounting entities and being able to report based on a single currency. It uses the base currency defined by Infor CRM. For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “Enabling the Normalize Base Currency Values custom setting”.
Back Office Extension integration	**87**	**(Optional) Enable Master Data Consolidation** This feature consolidates duplicate accounts with the same CustomerID, which can result when host systems such as ERP-M3, ERP-LX and ERP-Visual. This applies to Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Products, and Persons. ■ This feature is off by default until you select the Master Data Consolidation option when running the Conversion Utility. ■ Once Master Data Consolidation has been enabled, you cannot roll back the converted data. If your environment does not already contain pre-existing data from an ERP system, you can enable Master Data Consolidation from the Infor CRM Web Client. **To enable** 1. Sign in to the **Infor CRM Web Client** as **Administrator**. 2. On the Navigation bar expand **Integration**, click **Integrations**. 3. In the list view, select **Back Office Extension**. 4. In the detail view, on the **Options** tab, scroll to locate **Master Data Consolidation**. 5. Double-click in the **Value** column and change **False** to **True**. 6. Click the Save icon. If you are upgrading an environment that contains pre-existing data duplicates, and you did not run Master Data Consolidation in task 35, you may do so at any time. **To consolidate existing data** 1. On the machine where Infor CRM Admin Tools is installed, locate the

Required for	Task	Task Description
		ConversionUtility_9.0.exe. This is typically “C:\Program Files (x86)\Saleslogix” 2. Open **ConversionUtility_9.0.exe**. 3. Select **Master Data Consolidation**. 4. Click **Update**.
Back Office Extension integration	**88**	**(Optional) Enabling System of Record** Optionally, Infor CRM SLX may publish a limited set of Business Object Documents, BODs, as the system of record in the absence of a host ERP system. These instructions assume that Infor CRM SLX Back Office Extension is already configured in your environment. This includes configuration with Infor ION and a supported ERP system. **To enable** 1. Sign into the **Infor CRM Web Client** as the **Administrator**. 2. On the **Integrations** List view, click **Back Office Extension**, and click the **Options** tab. 3. Locate and set the **Tenant** and the **Logical ID**. The Tenant and the Logical ID fields contain the same values as those used in the Infor ION Connection point defined for Infor CRM. If you do not have these values, contact your ION Administrator. 4. Click **Save**. 5. While still in the **Back Office Extension** detail view, click the **Back Offices** tab. 6. In the grid, locate and click **InforCRM SOR**. 7. In the **Back Office - InforCRM SOR** detail view, set the **Logical ID**. This is the Infor CRM Logical ID and is the same value used to set the Logical ID in step 3 above. 8. Select the **Active** check box and then click **Save**. You must now provide the appropriate users with permissions to Promote Opportunity records from Infor CRM. For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “What is System of Record?”. **Enabling Permissions for Promote** When Infor CRM is enabled as system of record, users with appropriate permissions will have the ability to promote selected record types to the ERP system. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Promote feature will not be available to users who have not been assigned permissions. **To assign Promote permissions** 1. Sign into the **Infor CRM Web Client** as the Administrative user. 2. In the Navigation bar, expand **Administration**, select **Roles**, and select the role assigned to users who are to be given permissions to Promote. 3. You may choose to create a new role or assign these permissions to

Required for	Task	Task Description
		an existing role, such as the Standard Use role. 4. Click the **Actions** tab. 5. Click the Add (plus) button. 6. In the **Lookup**, perform a search by selecting **Name**, then select **Contains**, and then type **Promote**. 7. Double-click each action you want to assign to the role, and then click **Close** to close the Lookup.

<table>
<tr><th>Required for</th><th>Task</th><th>Task Description</th></tr>
<tr><td>Back Office Extension integration</td><td>89</td><td>
(Optional) Configuring Price and Availability
If your Infor CRM installation includes the Back Office Extension feature, the following steps are required to configure Price and Availability. You do not have to reconfigure Price and Availability if you already configured it during a previous update.
Adding the End Point URL for the Back Office Price Services
For the Back Office Price services to communicate correctly with the ERP, you must add the unique End Point URL for each Back Office Price service supported by your ERP. Contact your ERP Administrator for these Back Office URL.
For on-premises implementations using Basic authentication
To modify

Sign in to Infor CRM as Administrator.
In the Navigation Bar, expand Administration, and then click Integrations.
Click Back Office Extension.
In the Back Office Extension detail view, click the Back Offices tab
Click to select your Back Office.
In the Back Office detail view, in the Price Services tab, click the Price Service you want to edit.
In the Price Service detail view, in the End Point field, copy and paste the End Point URL that matches the Price Service in the ERP.
This is the End Point URL provided by your ERP Administrator.
If necessary, enter the User name and Password.
This is the User name and Password provided by your ERP Administrator
Repeat steps 6 and 7 for each Price Service listed for your ERP.

For multi-tenant implementations using OAuth-2 authentication
Please refer to KB 2183558 for set-up instructions.
</td></tr>
</table>

<table>
<tr><th>Required for</th><th>Task</th><th>Task Description</th></tr>
<tr><td>Back Office Extension integration</td><td>90</td><td>
Update the ION Connection Point and Document Flows
ProcessQuote and ProcessSalesOrders must be added to the ION Connection Point and Document flow to the host ERP system to receive this information from Infor CRM.
For instructions on updating ION Connection points and Document flows, see the Infor CRM Back Office Extension Customization Guide. This document is available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/.
Confirm necessary BOD Mapping Outbound triggers are enabled
These triggers must be enabled on any entity that is bi-directional, for Infor CRM to publish BODs to your host ERP system. The default setting on entities that are not bidirectional is off.
See the Systems Integration Guide for your ERP for a full list of required triggers.
To modify

Sign in to Infor CRM as Administrator.
In the Navigation Bar, expand Administration, and then click Integrations.
Click Back Office Extension.
In the Back Office Extension detail view, click the Back Offices tab.
Click to select your Back Office.
In the Back Office detail view, in the BOD Mappings tab, review the settings in the following columns for each mapping:

Outbound on Create
Enables creating new records in CRM and promoting them to the host system.
Outbound on Update
Enables modifying promoted records and publishing changes to the host system.
Outbound on Delete (optional)
Enables the Delete button on the detail view tabs, which enables users to delete Product lines in Quotes and Sales Orders. Note that it also enables the Delete button on the detail view, which enables users to delete the entire Sales Order or Quote.

If the settings do not match the settings specified in Systems Integration Guide for your ERP, select the Mapping to open the BOD Mapping Detail view and edit the setting using the pick list for each trigger.

</td></tr>
</table>

Enabling integration with Infor Configure Price Quote (CPQ)

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

<table>
<tr><th>Required for</th><th>Task</th><th>Description</th></tr>
<tr><td></td><td>91</td><td>(Optional) Enable Infor CRM Sales Orders and Quotes to use Infor Configure Price Quote (CPQ-Configurator).

Infor CPQ provides a visual, rules-based configurator software that integrates with Infor CRM to accelerate product configuration, pricing and quoting. The connection to Infor CPQ is available in Infor CRM. You must enable the configuration and then create the configuration groups that will provide the correct components.

For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “Infor CPQ Overview”.

To enable
1. Sign in to the Infor CRM Web Client as Administrator.
2. In the Navigation Bar, expand Integration and then click Integrations.
3. In the Integrations List View, click Infor CPQ.
4. In the Integration - Infor CPQ detail view,
The integration boxes will be autofilled by default.
5. Click the Enabled check box and then click Save.
6. Select the Configuration Group tab and then click Add Configuration (plus icon).
7. In the Add Configuration Group window, type the information that will connect Infor CRM to the product information in the product configurator. If you do not have this information, contact your CPQ administrator:
■ Application Name: The application name registered in the Product Configuration Manager Enterprise Manager. It is a combination of the configuration model and the output database. For example: InforCRM_DB.
■ Config Group Name: Type the intuitive name of your choice.
■ Description: A description of the group.
■ Instance Name: The instance ID that identifies your database instance. For example, InforCRM_DB. A single server can host several instances of PCM Configurator.
■ Name Space: The namespace of the product configurator model as defined in PCM Design Studio.
■ Ruleset Name: This is the name of the Product Configuration Model as defined in PCM Design Studio. For example, if the product being designed is a bicycle, the Ruleset name assigned might be “Bike”.
■ Service URL: The URL for the Integration Web Service.
■ API Key: The key used to identify the tenant connection to the API. This key can be acquired by the tenant administrator through the PCM Home page. Keep this key private.</td></tr>
</table>

Required for	Task	Description
		Task 91 - continued 8. Click **Test link**. 9. If the test status is successful, click **OK**. 10. Repeat steps to **6** though **9** for each group you need to add.

Enabling integration with Infor Ming.le

Required for	Task	Description
Infor Ming.le	**92**	**(Optional) Integrate with Infor Ming.le** For steps to integrate Infor CRM v9.0 with Ming.le, see the following documents: ▪ Integrating Infor CRM with Infor Mingle_cloud.pdf ▪ Integrating Infor CRM with Infor Mingle_on-premises.pdf. Both documents are available from the Infor Support Portal available from Infor Concierge at https://concierge.infor.com/.
	93	**(Optional) Enabling CPQ Enterprise Quoting** The implementation of the Infor CPQ Enterprise Quoting user interface as the Infor CRM Quote user interface requires: ▪ Infor CPQ Configurator implemented and configured. See task 91. ▪ Infor CPQ Enterprise Quoting integration configuration parameters and endpoint defined in the Infor CRM, Infor CPQ integration form EQ Configuration tab. ▪ EQ BOD Pack loaded and configured with the corresponding ION Connection Point Logical ID. ▪ Integration with a CPQ Enterprise Quoting compatible host ERP system. ▪ Infor CRM Master Data Consolidation option enabled. See task 87. **To enable CPQ-Enterprise Quote user interface:** 1. Provision Infor CRM in a common Infor Ming.le tenant with Infor CPQ Enterprise Quoting 2. Sign in to the **Infor CRM Web Client** as Administrator. 3. In the Navigation Bar, expand **Administration** and then click **Integrations**. 4. In the **Integrations** list View, click **Infor CPQ**. 5. In the **Integration - Infor CPQ** detail view, the integration boxes will be automatically completed by default. 6. Update the **EQ Configuration** tab content using on the implementation settings of CPQ Enterprise Quoting. 7. Update the **Configuration Group** tab with the **CPQ configurator** integration parameters. 8. On the **Infor CPQ integration** detail view, select the **Enabled** check box. 9. Click **Save**. 10. Update the **Infor EQ Back Office Logical ID**.

Required for	Task	Description
		11. If you have not already run the conversion utility to enable the Master Data Consolidation integration to convert the pre-existing data, do so using the steps in task 87.

Next Steps

You have completed the upgrade to Infor CRM v9.0. For more information about the changes in this release:

See Chapter 2, "What's New in this release" on page 51 and the “What’s New in this Release” topic in the online Help systems for an explanation of the new features.

See Chapter 3, "Changes in this release" on page 57 for information about the schema, plugins, and files changes in this release.

Chapter 2
What's New in this release

2

This chapter lists all breaking changes, new features, and deprecated features for Infor CRM SLX since version 9.0. This includes defects previously addressed in Updates. Refer to the Fixed Issues List on the Infor Support Portal Web site for more information.

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

New Enhancements

Application	Feature
9.0	
Web Client	
	General
	Lookups now support searching across all phone numbers or email addresses, so that when a user performs a lookup on any phone number property or email property the search will be performed against all phone number or email properties, not just for the selected option. **Note:** If your implementation has customized entities, properties, or forms additional steps may be required. For details, see "Enabling Lookups to Search All Phone Numbers or Emails" topic in the Application Architect
	Ability to send an attachment in an email from the detail views Attachment tab.
	Ability to send a library file in an email from the Library.
	Ability to merge contacts from the Account detail view Contacts tab.
	Ability to promote a group to the Dashboard page or Welcome page.
	Updated Snapshots on the Opportunity, Quote, and Sales Order detail views.
	Updated Activity, Note, and History dialog boxes.
	The Products tab and Edit Product dialog box on the Opportunity, Quote, and Sales Order detail views were redesigned to emphasize the opportunity, quote or sales order currency in a multi-currency environment.
	User Interface

	Refreshed user interface:
	▪ Ability to select a theme color from the Theme menu
	▪ Ability to specify light, dark, or high-contrast mode
	▪ Interface styles
	    ▪ Information is emphasized
	        • Editable information is bold

Application	Feature
	• Read-only information is in black text • Labels are now a lighter gray and, in detail views, moved to above the information. ■ Field borders appear in insert mode, all dialog boxes and when in focus. **Note:** Custom or customized forms will not automatically inherit the new user interface styles. To apply the new styles to custom forms see Task 45 "Opt-in to apply new styling to custom or customized forms" on page 25.
	An asterisk appears next to all required fields on insert views.
	A new contact card on the Contact Detail view that highlights the most important contact information including the ability to upload a photo of the contact and a company image which can also be added from the Account detail view.
	The ability to add an account image from the Account detail view that will also automatically appear on any associated contact's detail views.
	KPIs
	Ability to view and manage KPIs on the Accounts, Opportunities, Quotes, Sales Orders, Invoices, Contracts, Returns, and Tickets list views. For more information see "Working with List View KPIs" in the Web Client online help.
	Logging to History
	You can now log a phone call, meeting, or to-do to history from the new Log menu. When any of these items are selected, the Complete Activity screen opens without first requiring you to select a contact, account, or opportunity. If you are on a detail view when you select any of these menu items, the appropriate Associations will be added for you automatically. You can also create a new note from this menu. This menu is hidden by default, but can be made visible by adding the Toolbar/Log secured action to a role.
	Dashboard Widgets
	Bubble chart A bubble chart uses bubbles or circles to show the relationship between categories. Bubble chart widgets allow multiple data sources to be defined and compared and are most appropriate for three or more data sources.
	Group List A group list widget allows you to define and display a list of records in the Dashboard. You can sort the columns in the list and navigate to the account or entity for more detailed information with the View Group link.
	Mail Merge
	Infor CRM SLX Microsoft Word add-in ■ When output to Email there is a new From option to specify the email address from which the merged email will be sent. By default, the email address for the logged in user. ■ Mail Merge Complete dialog box: ■ New Failed Records section listing records that failed to merge. ■ New “Create Failed Merge Group” button. If clicked: • Contains the contacts or leads that failed to merge when invalid or failed merges occur.

Application	Feature
	• The group is named MM Issues - MM-DD-YY HH.mm. • The group is visible in either the Leads list view if merged with leads, or the Contacts list view if merged with contacts, accounts, opportunities, sales orders, quotes, contracts, returns, or tickets. • The group is not automatically marked as a Favorite and therefore is not visible as a tab until marked as a Favorite. ■ New options when editing merge fields: ■ **Hide entire paragraph if field does not contain data** Select this option to hide the entire paragraph if the field does not contain any data. This prevents empty paragraphs or text that is missing data from appearing in the merge document. ■ **Specify image size**, **Width**, and **Height** (Only available if Format Type is Image) Select this check box to specify the image size. In the Width and Height fields, you can specify width and height of the image in inches. The default values are 1.00 inch by 1.00 inch.
Web Client Administrator	
	Office Profile
	The ability to add company image from the Office Profile view that will also automatically appear in the upper left corner above the Navigation bar.
	Territory realignment
	Ability to reassign ownership of accounts with a new Common Tasks option in the Accounts List view . **Note**: A territory realignment also updates the owner of related contacts, opportunities, sales orders, quotes, tickets, and returns.
	Updating Multiple Records
	When updating multiple accounts to change the owner, account manager, regional manager, or divisional manager that change will cascade and update the same value for all related contacts, opportunities, quotes, sales orders, returns,contracts, and tickets.
	Custom Settings
	■ Group List Double Click Enabled ■ If set to True, double-clicking a record in a list view will open the record's detail view.
	Secured Actions
	■ Toolbar/Log
	■ Entities/Account/Territory Realignment

Application	Feature
Back Office	
	The Products tab and Edit Product dialog box on the Opportunity, Quote, and Sales Order detail views were redesigned to support the ability to override pricing in an integrated environment.
	Custom Settings
	■ **CRMPriceOverrideReasonCode** The Reason Code to be added to a Discount Charge item created for a price adjustment to quote or sales order product that occurred in Infor CRM SLX. The default value is NULL as it is implementation specific. ■ **ERPPriceOverrideReasonCode** The Reason Code to be added to a Discount Charge item created for a price adjustment to quote or sales order product that occurred in the ERP. The default value is NULL as it is implementation specific. ■ **PriceAdjEnabled** If set to True, users can make adjustments to unit price of sales order and quote products in Infor CRM SLX by adjusting the unit price and discounts will be calculated based on the unit price and percentage. Default is set to NULL which is interpreted as False. ■ **ERPPriceOverrideEnabled** If set to True, users can edit the unit price of sales order and quote products in Infor CRM SLX. Default is set to NULL which is interpreted as False
Application Architect	
	Upgrade safe improvements
	The Infor CRM SLX v9.0 SLXCustom.zip bundle adds 2 new files to make .css stylesheet and JavaScript customizations upgrade safe.
	Custom or customized forms will not automatically inherit the new user interface styles implemented in version 9.0. A new Style Scheme property, “opt-in” must be applied to any forms you want to inherit the new user interface styles.
	New properties added via a bundle now include the display names.

Enhancements since version 8.5

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. 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.				

Application	Feature	Requires			
		SNC	Web	BOD Pack	Infor Ming.le
	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. In a mixed Web and Windows environment, Infor CRM SLX strongly recommends creating and editing calculated fields in the Web Client and then using the computed fields in the specified base table in all clients. Calculated fields created and edited in the Web Client are available in any Infor CRM SLX client using the new column in the specified base table. In Query Builder for Windows you will see duplicate fields with the same name, one that represents a calculated field, and the other which represents a computed column. Either field is valid. Calculated fields created outside of the Web Client will not be available in the Web Client until the conversion utility is run. 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.				
Web Client Administrator					
	The ability to add picklist aliases.				
Back Office					
	Is Value Override	x	x		
	Administrators There is a new Is Value Override option in the Field Mapping Detail view and when adding, copying, customizing, or editing a field mapping. If this option is selected, when a BOD is processed and the field mapping property is not included as an attribute in the XML, the value in the Infor CRM SLX database will be set to NULL. If this option is cleared, when the BOD is processed and the field mapping property is not included as an attribute in the XML, no updates will be made to that property in Infor CRM SLX.				
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. For steps, see Task 23 "Configuring Database Connections for Application Architect" on page 14.				

See the “What’s New in this Release” topic in the online Help systems for more information about the new features.

Deprecated Features

This section lists the features deprecated in each update.

<table>
<tr><th>Application</th><th>Feature</th></tr>
<tr><td colspan="2"></td></tr>
<tr><td colspan="2">9.0</td></tr>
<tr><td colspan="2">Web Client</td></tr>
<tr><td></td><td>LinkedIn Sales Naviagation integration is no longer supported.</td></tr>
<tr><td colspan="2">8.5.0.01</td></tr>
<tr><td colspan="2">Web Client</td></tr>
<tr><td></td><td>Mail Merge
The changes to Mail Merge resulted in deprecating the following mail merge features:

Address labels are now only available through reports, not from the Literature Requests list view Literature tasks or as a part of mail merge.
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.
Email mail merge templates managed in the Web Client do not support special fields including SQL values, tables, or images.
Output to Fax is no longer supported in either the Web Client or Microsoft Word add-in.
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.
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.
"One-off" mail merges to Letter or Email are now handled as part of the standard mail merge process.
The Notes/History option, Send to Word, has been removed and may be replaced in a future release.
Literature Requests with a cover letter will only be available as output to File, output to Email is no longer supported.
Specifying base templates for contact and lead email, fax, or letter templates are no longer supported and those user options have been removed.
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.
</td></tr>
<tr><td colspan="2">Application Architect</td></tr>
<tr><td></td><td>
Importing from another project
Creating a project backup
Restoring from a project backup other than the Infor CRM SLX provided backup from version 8.4.0 or 8.5.0
Creating a manifest by project differences
</td></tr>
</table>

Chapter 3
Changes in this release

3

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

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

Finding script changes

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

To find script changes

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

Entities and Properties

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

Entity	Property	Description	8.5.x	9.0
Account	AccountImage (Memo)	Image of the account represented as a base64 data URI. This image is displayed on the Account detail view.		9.0
Account	BackOfficeId (String 12)	Added as foreign key reference to the BackOffice record	01	
Account	C_LASTHISTORYORCREATEDATE (DateTime)	Calculated field that returns the LASTHISTORYDATE or CREATEDATE		9.0
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	
Contact	ContactImage (Memo)	Image of the contact represented as a base64 data URI. This image is displayed on the Contact detail view		9.0
CustomQueryParameter	IsHidden (Boolean)	Adds a flag to hide the parameter from query builder. This is useful for parameters that are generated.		9.0
EmailTemplate		Stores Mail Merge email template information	01	

Entity	Property	Description	8.5.x	9.0
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	
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	

Entity	Property	Description	8.5.x	9.0
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	
Invoice	Profit (Double)	Calculated column for profit		9.0
Invoice	ProfitMArgin (Double)	Calculated column for profit margin		9.0
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	
LeadAddress	Address3	Is Workflow attribute set to True	01	
LeadAddress	Address4	Is Workflow attribute set to True	01	

Entity	Property	Description	8.5.x	9.0
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	
OfficeProfile	CompanyImage (Memo)	Image of the company represented as a base64 data URI. This image will be displayed at the top in the navigation menu and in the Office Profile detail view.		9.0
OpportunityProduct	DocPrice (Decimal)	The unit price for the line item in transactional currency.		9.0
OpportunityProduct	DocTotalDiscount (Decimal)	The total discount for the line item in transactional currency.		9.0
OpportunityProduct	TotalDiscount (Decimal)	The total discount for the line item.		9.0
OpportunityProduct	DocTotalAmount (Double)	The total amount of the line item in transactional currency.		9.0
OpportunityProduct	TotalAmount (Double)	The total amount of the line item.		9.0
OpportunityProduct	OverridePricing (Boolean)	Flag indicating if the unit price has been overridden by being manually entered.		9.0
OpportunityProduct	DocUnitErpAdjustment (Decimal)	The ERP unit adjustment sum in transactional currency based on the DiscountChargeItem ReasonCode.		9.0

Entity	Property	Description	8.5.x	9.0
OpportunityProduct	UnitErpAdjustment (Decimal)	The ERP unit adjustment sum in base currency based on the DiscountChargeItem ReasonCode.		9.0
OpportunityProduct	UnitErpAdjustmentPercent (Decimal)	ERP unit computed adjustment percentage based on DiscountChargeItem Bod element (s) ReasonCode exclusive of the CRM discount ReasonCode element.		9.0
OpportunityProduct	DocErpNetUnitPrice (Decimal)	Computed Unit Price in transaction currency after applying the ERP based adjustment(s) published in DistributedCharge Bod element(s) exclusive of the CRM discount ReasonCode.		9.0
OpportunityProduct	ErpNetUnitPrice (Decimal)	Computed Unit Price in base currency after applying the ERP based adjustment(s) published in DistributedCharge Bod element(s)exclusive of the CRM discount ReasonCode.		9.0
OpportunityProduct	DocUnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in transaction currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
OpportunityProduct	UnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in base currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
OpportunityProduct	UnitCrmAdjustmentPercent (Decimal)	Computed Unit Price Adjustment percentage based on user input or computed as (UnitCrmAdjustment/ErpNetUnitPrice).		9.0
OpportunityProduct	PretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (CalculatedPrice * Quantity).		9.0

Entity	Property	Description	8.5.x	9.0
OpportunityProduct	DocTotalCrmDiscountAmount (Decimal)	Computed total CRM discount in transaction currency based on user input or computed as (DocUnitCrmAdjusment * Quantity).		9.0
OpportunityProduct	DocPretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (DocCalculatedPrice * Quantity).		9.0
OpportunityProduct	TotalCrmDiscountAmount (Decimal)	Computed total CRM discount in base currency based on user input or computed as (UnitCrmAdjusment * Quantity)		9.0
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	Closed (Boolean)	Flag indicating whether or not the quote is Closed		9.0
Quote	ClosedDate (DateTime)	The date the quote was closed		9.0
Quote	DocDiscountTotal (Double)	The total value of the discount applied to the quote in transactional currency.		9.0
Quote	DocTaxTotal (Double)	The tax total applied to the quote in transactional currency.		9.0
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	

Entity	Property	Description	8.5.x	9.0
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	
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	
QuoteItem	DocPrice (Decimal)	The unit price for the line item in transactional currency		9.0
QuoteItem	DocTotalDiscount (Decimal)	The total discount for the line item in transactional currency.		9.0
QuoteItem	TotalDiscount (Decimal)	The total discount for the line item.		9.0
QuoteItem	DocUnitErpAdjustment (Decimal)	The ERP unit adjustment sum in transactional currency based on the DiscountChargeItem ReasonCode.		9.0
QuoteItem	UnitErpAdjustment (Decimal)	The ERP unit adjustment sum in base currency based on the DiscountChargeItem ReasonCode.		9.0
QuoteItem	UnitErpAdjustmentPercent (Decimal)	ERP unit computed adjustment percentage based on DiscountChargeItem Bod element (s) ReasonCode exclusive of the CRM discount ReasonCode element		9.0
QuoteItem	DocErpNetUnitPrice (Decimal)	The ERP unit adjustment sum in transactional currency based on the DiscountChargeItem ReasonCode.		9.0

Entity	Property	Description	8.5.x	9.0
QuoteItem	ErpNetUnitPrice (Decimal)	Computed Unit Price in base currency after applying the ERP based adjustment(s) published in DistributedCharge Bod element(s)exclusive of the CRM discount ReasonCode.		9.0
QuoteItem	DocUnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in transaction currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
QuoteItem	UnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in base currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
QuoteItem	UnitCrmAdjustmentPercent (Decimal)	Computed Unit Price Adjustment percentage based on user input or computed as (UnitCrmAdjustment/ErpNetUnitPrice).		9.0
QuoteItem	PretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (CalculatedPrice * Quantity).		9.0
QuoteItem	DocTotalCrmDiscountAmount (Decimal)	Computed total CRM discount in transaction currency based on user input or computed as (DocUnitCrmAdjusment * Quantity).		9.0
QuoteItem	DocPretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (DocCalculatedPrice * Quantity)		9.0
QuoteItem	TotalCrmDiscountAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (DocCalculatedPrice * Quantity).		9.0
Return		Is Workflow attribute set to True for the entity	01	
Return	AssignedDate	Is Workflow attribute set to True	01	

Entity	Property	Description	8.5.x	9.0
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	
SalesOrder	Closed (Boolean)	Flag indicating whether or not the sales order is Closed.		9.0
SalesOrder	ClosedDate (DateTime)	The date the sales order was closed		9.0
SalesOrder	DocDiscountTotal (Double)	The total value of the discount applied to the sales order in transactional currency.		9.0
SalesOrder	DocTaxTotal (Double)	The tax total applied to the sales order in transactional currency.		9.0
SalesOrderItem	DocPrice (Decimal)	The unit price for the line item in transactional currency.		9.0
SalesOrderItem	DocTotalDiscount (Decimal)	The total discount for the line item in transactional currency.		9.0
SalesOrderItem	TotalDiscount (Decimal	The total discount for the line item.		9.0

Entity	Property	Description	8.5.x	9.0
SalesOrderItem	DocUnitErpAdjustment (Decimal)	The ERP unit adjustment sum in transactional currency based on the DiscountChargeItem ReasonCode.		9.0
SalesOrderItem	UnitErpAdjustment (Decimal)	The ERP unit adjustment sum in base currency based on the DiscountChargeItem ReasonCode.		9.0
SalesOrderItem	UnitErpAdjustmentPercent (Decimal)	ERP unit computed adjustment percentage based on DiscountChargeItem Bod element (s) ReasonCode exclusive of the CRM discount ReasonCode element		9.0
SalesOrderItem	DocErpNetUnitPrice (Decimal)	The ERP unit adjustment sum in transactional currency based on the DiscountChargeItem ReasonCode.		9.0
SalesOrderItem	ErpNetUnitPrice (Decimal)	Computed Unit Price in base currency after applying the ERP based adjustment(s) published in DistributedCharge Bod element(s)exclusive of the CRM discount ReasonCode.		9.0
SalesOrderItem	DocUnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in transaction currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
SalesOrderItem	UnitCrmAdjustment (Decimal)	Computed Unit Price Adjustment in base currency based on user input or published in DistributedCharge Bod element containing the CRM discount ReasonCode.		9.0
SalesOrderItem	UnitCrmAdjustmentPercent (Decimal)	Computed Unit Price Adjustment percentage based on user input or computed as (UnitCrmAdjustment/ErpNetUnitPrice).		9.0
SalesOrderItem	PretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (CalculatedPrice * Quantity).		9.0

Entity	Property	Description	8.5.x	9.0
SalesOrderItem	DocTotalCrmDiscountAmount (Decimal)	Computed total CRM discount in transaction currency based on user input or computed as (DocUnitCrmAdjusment * Quantity).		9.0
SalesOrderItem	DocPretaxTotalAmount (Decimal)	Computed extended price in transaction currency based on user input or computed as (DocCalculatedPrice * Quantity).		9.0
SalesOrderItem	TotalCrmDiscountAmount (Decimal)	Computed total CRM discount in base currency based on user input or computed as (UnitCrmAdjusment * Quantity).		9.0
SLXLocation	BackOfficeId (String 12)	Added as foreign key reference to the BackOffice record	01	
Ticket	SumTicketActivityElapsedUnits (Double	Sum of all child TicketActivity.ElapsedUnit records for the ticket.		9.0

Relationships

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

Parent	Relationship	Child	8.5.x	9.0
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	

Parent	Relationship	Child	8.5.x	9.0
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	
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	

Parent	Relationship	Child	8.5.x	9.0
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	
Opportunity.HistoryAssociations	1:M	History Association.Opportunity		9.0
Owner.EmailTemplateProperties	1:M	Email Template Property.Owner		9.0
Pick List.PicklistAliases	1:M	Pick List Alias.PickList	01	
Quote.QuoteDistributedTaxes	1:M	Discount Charge Item.QuoteDistributedTax		9.0
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	
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	

Parent	Relationship	Child	8.5.x	9.0
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	

Views

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

Views	Description	8.5.x	9.0
EmailTemplatePropertyView	Combines the EmailTemplate and EmailTemplateProperty tables	01	
ProductLocationView (MSSQL)	Updated to present the loc.ERPACCOUNTINGENTITYID content instead of the current product based p.ERPACCOUNTINGENTITYID content		9.0
Product_Location_View (Oracle)	Updated to present the loc.ERPACCOUNTINGENTITYID content instead of the current product based p.ERPACCOUNTINGENTITYID content		9.0

Tables with no Corresponding Entity in the Entity Model

None added since 8.5

Inserted Records

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

Open the ICRM SLX v9.0 VFS Actions.zip 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	9.0
VIRTUALFILESYSTEM	01	
CUSTOMSETTINGS	01	

Scripts

None added since 8.5

Filters

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

Package	Entity	Filter	8.5.x	9.0
Saleslogix Application Entities	Account	AverageDaysSinceLastActivity		9.0
Saleslogix Application Entities	Account	AverageTimeAsCustomer		9.0
Saleslogix Application Entities	Account	CountTickets		9.0
Saleslogix Application	Account	MaxDaysSinceLastActivity		9.0

Package	Entity	Filter	8.5.x	9.0
Entities				
Saleslogix Application Entities	Account	MaxRevenue		9.0
Saleslogix Application Entities	Account	MaxTimeAsCustomer		9.0
Saleslogix Application Entities	Account	MinDaysSinceLastActivity		9.0
Saleslogix Application Entities	Account	MinRevenue		9.0
Saleslogix Application Entities	Account	MinTimeAsCustomer		9.0
Saleslogix Application Entities	Account	SumDaysSinceLastActivity		9.0
Saleslogix Application Entities	Account	SumTimeAsCustomer		9.0
Saleslogix Application Entities	Contract	ContractAmountAverage		9.0
Saleslogix Application Entities	Contract	ContractAmountMax		9.0
Saleslogix Application Entities	Contract	ContractAmountMin		9.0
Saleslogix Application Entities	Contract	TimeRemainingOnContract		9.0
Saleslogix Application Entities	Contract	TimeRemainingOnContractMax		9.0
Saleslogix Application Entities	Contract	TimeRemainingOnContractMin		9.0
Saleslogix Application Entities	EmailTemplate	CreateUser	01	
Saleslogix Application Entities	EmailTemplate	EntityType	01	
Saleslogix Application Entities	ErpInvoice	AverageGrandTotal		9.0

Package	Entity	Filter	8.5.x	9.0
Saleslogix Application Entities	ErpInvoice	AverageProfit		9.0
Saleslogix Application Entities	ErpInvoice	AverageProfitMargin		9.0
Saleslogix Application Entities	ErpInvoice	CountInvoices		9.0
Saleslogix Application Entities	ErpInvoice	MaxGrandTotal		9.0
Saleslogix Application Entities	ErpInvoice	MaxProfit		9.0
Saleslogix Application Entities	ErpInvoice	MaxProfitMargin		9.0
Saleslogix Application Entities	ErpInvoice	MinGrandTotal		9.0
Saleslogix Application Entities	ErpInvoice	MinProfit		9.0
Saleslogix Application Entities	ErpInvoice	MinProfitMargin		9.0
Saleslogix Application Entities	ErpInvoice	SumExtendedBaseCost		9.0
Saleslogix Application Entities	ErpInvoice	SumExtendedCost		9.0
Saleslogix Application Entities	ErpInvoice	SumProfitMargin		9.0
Saleslogix Application Entities	ErpInvoice	SumTotalProfit		9.0
Saleslogix Application Entities	Lead	City	01	
Saleslogix Application Entities	Lead	State	01	
Saleslogix Application Entities	Opportunity	AverageActualAmount		9.0
Saleslogix	Opportunity	AverageCloseProbability		9.0

Package	Entity	Filter	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	Opportunity	AverageSalesPotential		9.0
Saleslogix Application Entities	Opportunity	DaysInPipeLineOpen		9.0
Saleslogix Application Entities	Opportunity	MaxActualAmount		9.0
Saleslogix Application Entities	Opportunity	MaxCloseProbability		9.0
Saleslogix Application Entities	Opportunity	MinDaysFromOpenToClose		9.0
Saleslogix Application Entities	Opportunity	MinDaysInPipeLineOpen		9.0
Saleslogix Application Entities	Opportunity	MinActualAmount		9.0
Saleslogix Application Entities	Opportunity	MinCloseProbability		9.0
Saleslogix Application Entities	Opportunity	MinDaysFromOpenToClose		9.0
Saleslogix Application Entities	Opportunity	MinDaysInPipeLineOpen		9.0
Saleslogix Application Entities	Opportunity	SumCloseProbability		9.0
Saleslogix Application Entities	Opportunity	SumDaysInPipeline		9.0
Saleslogix Application Entities	Opportunity	SumDaysInPipeLineOpen		9.0
Saleslogix Application Entities	Quote	AgeAverage		9.0
Saleslogix Application Entities	Quote	AgeMax		9.0
Saleslogix Application	Quote	AgeMin		9.0

Package	Entity	Filter	8.5.x	9.0
Entities				
Saleslogix Application Entities	Quote	CommissionTotal		9.0
Saleslogix Application Entities	Quote	DiscountAverage		9.0
Saleslogix Application Entities	Quote	DiscountTotal		9.0
Saleslogix Application Entities	Quote	GrandTotalAverage		9.0
Saleslogix Application Entities	Quote	GrandTotalMax		9.0
Saleslogix Application Entities	Quote	GrandTotalMin		9.0
Saleslogix Application Entities	Return	CompletedReturnsAgingAverage		9.0
Saleslogix Application Entities	Return	CompletedReturnsAgingMax		9.0
Saleslogix Application Entities	Return	CompletedReturnsAgingMin		9.0
Saleslogix Application Entities	Return	CompletedReturnDeliveryComparedtoEstimateAgingMax		9.0
Saleslogix Application Entities	Return	CompletedReturnDeliveryComparedtoEstimateAgingMin		9.0
Saleslogix Application Entities	Return	OpenReturnsAgingAverage		9.0
Saleslogix Application Entities	Return	ReturnsAgingMax		9.0
Saleslogix Application Entities	Return	ReturnsAgingMin		9.0
Saleslogix Application Entities	SalesOrder	AgeAverage		9.0
Saleslogix Application Entities	SalesOrder	AgeMax		9.0

Package	Entity	Filter	8.5.x	9.0
Saleslogix Application Entities	SalesOrder	AgeMin		9.0
Saleslogix Application Entities	SalesOrder	CommissionTotal		9.0
Saleslogix Application Entities	SalesOrder	DiscountTotal		9.0
Saleslogix Application Entities	SalesOrder	GrandTotalAverage		9.0
Saleslogix Application Entities	SalesOrder	GrandTotalMax		9.0
Saleslogix Application Entities	SalesOrder	GrandTotalMin		9.0
Saleslogix Application Entities	SalesOrder	OpenSalesOrderDeliveryExpectationAverage		9.0
Saleslogix Application Entities	Ticket	AverageActivityElapsedUnits		9.0
Saleslogix Application Entities	Ticket	ClosedTicketAgeMax		9.0
Saleslogix Application Entities	Ticket	ClosedTicketAgeMin		9.0
Saleslogix Application Entities	Ticket	LastTouchedAverage		9.0
Saleslogix Application Entities	Ticket	LastTouchedMax		9.0
Saleslogix Application Entities	Ticket	LastTouchedMin		9.0
Saleslogix Application Entities	Ticket	MaxActivityElapsedUnits		9.0
Saleslogix Application Entities	Ticket	MinActivityElapsedUnits		9.0
Saleslogix Application Entities	Ticket	OpenTicketAgeMax		9.0
Saleslogix	Ticket	OpenTicketAgeMin		9.0

Package	Entity	Filter	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	Ticket	OpenTicketAgingAverage		9.0
Saleslogix Application Entities	Ticket	SumActivityElapsedUnits		9.0

Create Indexes

The following lists indexes added since in v8.5.

Index Name	8.5.x	9.0
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	
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	

Events

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

Package	Entity	Event	8.5.x	9.0
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	

Package	Entity	Event	8.5.x	9.0
Saleslogix Application Entities	ERPInvoiceItem	OnAfterInsert		9.0
Saleslogix Application Entities	ERPInvoiceItem	OnAfterUpdate		9.0
Saleslogix Application Entities	PicklistAlias	OnBeforeInsert	01	
Saleslogix Application Entities	PicklistAlias	OnBeforeUpdate	01	
Saleslogix Application Entities	TicketActivity	OnAfterDelete		9.0
Saleslogix Application Entities	TicketActivity	OnAfterInsert		9.0
Saleslogix Application Entities	TicketActivity	OnAfterUpdate		9.0

Business Rules

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

Package	Entity	Business Rule	8.5.x	9.0
Saleslogix Application Entities	Account	ChangeAccountOwner		9.0
Saleslogix Application Entities	Account	OnAccountManagerChange		9.0
Saleslogix Application Entities	Account	OnDivisionalManagerChange		9.0
Saleslogix Application Entities	Account	OnRegionalManagerChange		9.0
Saleslogix Application Entities	AreaCategoryIssue	GetDistinctAreaCategories	01	
Saleslogix Application Entities	AreaCategoryIssue	GetDistinctAreaCategoryIssues	01	
Saleslogix Application Entities	AreaCategoryIssue	GetDistinctAreas	01	
Saleslogix Application Entities	BackOffice	EmailAttachments		9.0
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	
Saleslogix Application Entities	Lead	CanChangeMarketoOwner	01	
Saleslogix Application Entities	Opportunity	GetDefaultOpportunityDescription	01	
Saleslogix Application Entities	OpportunityProduct	SetDocCalculatedPriceOnchange		9.0
Saleslogix Application Entities	OpportunityProduct	SetDocTotalDiscountOnChange		9.0
Saleslogix Application Entities	OpportunityProduct	SetQuantityOnChange		9.0
Saleslogix Application Entities	Quote	RequestUpdateHeader		9.0
Saleslogix Application Entities	QuoteItem	CalculateZeroProductBasePriceChange		9.0

Package	Entity	Business Rule	8.5.x	9.0
Saleslogix Application Entities	QuoteItem	CalculateZeroProductDocPriceChange		9.0
Saleslogix Application Entities	QuoteItem	RefreshQuoteItemDiscountChargeItems		9.0
Saleslogix Application Entities	QuoteItem	SetDocCalculatedPriceOnChange		9.0
Saleslogix Application Entities	QuoteItem	SetDocTotalCrmDiscountAmountOnChange		9.0
Saleslogix Application Entities	QuoteItem	SetDocUnitCrmAdjustmentOnChange		9.0
Saleslogix Application Entities	QuoteItem	SetQuantityOnChange		9.0
Saleslogix Application Entities	QuoteItem	SetUnitCrmAdjustmentPercentOnChange		9.0
Saleslogix Application Entities	SalesOrder	RequestUpdateHeader		9.0
Saleslogix Application Entities	SalesOrder	SetTaxTotals		9.0
Saleslogix Application Entities	SalesOrderItem	CalculateZeroProductBasePriceChange		9.0
Saleslogix Application Entities	SalesOrderItem	CalculateZeroProductDocPriceChange		9.0
Saleslogix Application Entities	SalesOrderItem	RefreshSalesOrderItemDiscountChargeItems		9.0
Saleslogix Application Entities	SalesOrderItem	SetDocCalculatedPriceOnChange		9.0
Saleslogix Application Entities	SalesOrderItem	SetDocTotalCrmDiscountAmountOnChange		9.0
Saleslogix Application Entities	SalesOrderItem	SetDocUnitCrmAdjustmentOnChange		9.0
Saleslogix Application Entities	SalesOrderItem	SetQuantityOnChange		9.0
Saleslogix Application Entities	SalesOrderItem	SetUnitCrmAdjustmentPercentOnChange		9.0
Saleslogix Application Entities	Ticket	CalcTicketActivityElapsedUnits		9.0

Database Objects – .sxb bundle

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

Database Object	8.5.x	9.0
CreateNameLFSql : MSSQL :	01	
CreateNameLFOracle : Oracle :	01	

Database Objects – VFS bundle

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

Database Object	8.5.x	9.0
AccountLastHistoryDateOrCreateDate		9.0
Delete_PicklistItem_Typo		9.0
Delete_SalesNavigator_Integration		9.0
EMAILTEMPLATEPROPERTYVIEW (MSSQL)	01	
EMAILTEMPLATEPROPERTYVIEW (Oracle)	01	
ERPINVOICE_C_PROFIT		9.0
ERPINVOICE_C_PROFITMARGIN		9.0
GLOBALCHANGETRACKING Triggers (MSSQL)	01	
Update HostBackOfficeId and SubscriberApp	01	
Update IsolateContent and IsolateBOEContent	01	
Update new DocPrice related content		9.0
UPDATE NULL IONEWORKFLOW DEFINITIONS		9.0
Update Oracle ERPInvoice Cost values (Oracle)		9.0
Update SQL Server ERPInvoice Cost Values (MSSQL)		9.0
Update_Opportunity_EstimatedClose (MSSQL)		9.0
Update_SecTableDefs_DateFields		9.0
Update_Triggers (MSSQL)	01	
UpdateSystemInfoCoreVersion (01)		9.0
UpdateSystemInfoCoreVersion(All)	01	

Plugins

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

Plugin Name	8.5.x	9.0
[DashboardPage] System:MyDashboard (Infor 8.501)	01	
[DashboardWidget] System:Group List (Infor 8.501)	01	

Plugin Name	8.5.x	9.0
[DashboardWidget] System:Todays Activities (Infor 8.501)	01	
(Menus System:Standard Menus)	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	

Reports

None added since 8.5

Picklists

None added since 8.5

Windows Forms

None added since 8.5

Web Forms

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

In version 9.0 many forms were updated for user interface changes

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Activity Support)	Activity	ActivityContactSummary		9.0
Saleslogix Activity Support)	Activity	ActivitySummaryList		9.0
Saleslogix Activity Support)	History	AddContactOrLeadNote		9.0
Saleslogix Activity Support)	History	HistoryDetails		9.0
Saleslogix Activity Support)	History	LeadHistoryDetails		9.0
Saleslogix Activity Support)	Event	EventDetails		9.0
Saleslogix Activity Support)	Event	EventSummary		9.0
Saleslogix Activity Support)	ResourceList	ResourceDetail		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Activity Support)	UserNotification	ConfirmationDetailSummary		9.0
Saleslogix Activity Support)	UserNotification	ConfirmationListSummary		9.0
Saleslogix Application Entities	Account	AccountContacts		9.0
Saleslogix Application Entities	Account	AccountDetails	01	9.0
Saleslogix Application Entities	Account	AccountErpDetails		9.0
Saleslogix Application Entities	Account	AccountExtendedDetails	01	9.0
Saleslogix Application Entities	Account	AccountOpportunities		9.0
Saleslogix Application Entities	Account	AccountQuotes		9.0
Saleslogix Application Entities	Account	AccountReturns		9.0
Saleslogix Application Entities	Account	AccountSalesOrders		9.0
Saleslogix Application Entities	Account	AccountSummaryView		9.0
Saleslogix Application Entities	Account	CopyAccount		9.0
Saleslogix Application Entities	Account	ErpAccountInvoices		9.0
Saleslogix Application Entities	Account	ErpAccountReceivables		9.0
Saleslogix Application Entities	Account	ErpAccountShipments		9.0
Saleslogix Application Entities	Account	ErpBillTos	01	9.0
Saleslogix Application Entities	Account	ErpShipTos	01	9.0
Saleslogix Application Entities	Account	Insert Account		9.0
Saleslogix Application Entities	AccountProduct	AddEditAccountProduct		9.0
Saleslogix Application Entities	BackOffice	BackOfficeBODMappings		9.0
Saleslogix Application Entities	BackOffice	BackOfficeBOEPAService		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Application Entities	BackOffice	BackOfficeCustomBOEPAService		9.0
Saleslogix Application Entities	BackOffice	BackOfficeDetails	01	9.0
Saleslogix Application Entities	BackOffice	InsertBackOffice	01	9.0
Saleslogix Application Entities	BODFieldMapping	AddEditBODFieldMapping	01	9.0
Saleslogix Application Entities	BODFieldMapping	FieldMappingDetail	01	9.0
Saleslogix Application Entities	BODMapping	InsertBODMapping	01	9.0
Saleslogix Application Entities	BODMapping	BODMappingDetails		9.0
Saleslogix Application Entities	BOEPAMapping	AddEditBOEPAMapping		9.0
Saleslogix Application Entities	BOEPAMapping	BOEPAMappingDetails		9.0
Saleslogix Application Entities	BOEPAService	AddEditBOEPAService		9.0
Saleslogix Application Entities	BOEPAService	BOEPAServiceDetail		9.0
Saleslogix Application Entities	Campaign	AddEditMarketingServicesUser		9.0
Saleslogix Application Entities	Campaign	CampaignBudgetResults		9.0
Saleslogix Application Entities	Campaign	CampaignDetails	01	9.0
Saleslogix Application Entities	Campaign	CampaignOpportunities		9.0
Saleslogix Application Entities	Campaign	CampaignSummary		9.0
Saleslogix Application Entities	Campaign	InsertCampaign		9.0
Saleslogix Application Entities	Competitor	CompetitorDetails		9.0
Saleslogix Application Entities	Contact	ContactCard		9.0
Saleslogix Application Entities	Contact	ContactDetails		9.0
Saleslogix Application Entities	Contact	ContactExtendedDetails		9.0
Saleslogix	Contact	ContactOpportunities		9.0

Package	Entity	Form Name	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	Contact	ContactSummaryView		9.0
Saleslogix Application Entities	Contact	CopyContact		9.0
Saleslogix Application Entities	Contact	ErpContactAccounts		9.0
Saleslogix Application Entities	Contact	InsertAccountContact		9.0
Saleslogix Application Entities	Contact	QuickInsertAccountContact		9.0
Saleslogix Application Entities	Contract	ContractComments	01	9.0
Saleslogix Application Entities	Contract	ContractDetail		9.0
Saleslogix Application Entities	Contract	ContractSummary		9.0
Saleslogix Application Entities	Contract	InsertContract		9.0
Saleslogix Application Entities	ContactLeadSource	AddEditContactLeadSource		9.0
Saleslogix Application Entities	CountryAlias	AddEditCountryAlias		9.0
Saleslogix Application Entities	CustomSetting	AddEditOBMCustomSettings	01	9.0
Saleslogix Application Entities	CustomSetting	CustomSettingDetails		9.0
Saleslogix Application Entities	CustomSetting	InsertCustomSetting		9.0
Saleslogix Application Entities	DeDupJob	DeDupJobDetail		9.0
Saleslogix Application Entities	DeDupResult	DeDupResultDetail		9.0
Saleslogix Application Entities	Defect	DefectComments		9.0
Saleslogix Application Entities	Defect	DefectDetails		9.0
Saleslogix Application Entities	Defect	DefectExtendedDetails		9.0
Saleslogix Application Entities	Defect	DefectHistory		9.0
Saleslogix	Defect	DefectReturns		9.0

Package	Entity	Form Name	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	Defect	DefectSummary		9.0
Saleslogix Application Entities	Defect	InsertDefect		9.0
Saleslogix Application Entities	DefectActivityItem	AddEditDefectTask		9.0
Saleslogix Application Entities	DefectActivityRate	AddEditDefectRate		9.0
Saleslogix Application Entities	DefectActivityRate	DefectActivityRateDetail		9.0
Saleslogix Application Entities	DefectActivityRate	DefectActivityRateExtendedDetails		9.0
Saleslogix Application Entities	EmailTemplate	EmailTemplateDetails	01	9.0
Saleslogix Application Entities	EmailTemplate	EmailTemplateProperties	01	9.0
Saleslogix Application Entities	EmailTemplate	InsertEmailTemplate	01	9.0
Saleslogix Application Entities	ERPBillTo	AddEditErpBillTo		9.0
Saleslogix Application Entities	ERPBillTo	ErpBillToContactAssociation		9.0
Saleslogix Application Entities	ERPBillTo	ErpBillToDetails	01	9.0
Saleslogix Application Entities	ERPInvoice	ErpInvoiceExtDetail		9.0
Saleslogix Application Entities	ERPInvoice	InvoiceDetail		9.0
Saleslogix Application Entities	ERPPayFrom	AddEditERPPayFrom		9.0
Saleslogix Application Entities	ERPPayFrom	ErpPayFromContacts		9.0
Saleslogix Application Entities	ERPPayFrom	ErpPayFromDetails		9.0
Saleslogix Application Entities	ERPPerson	ErpInsertPerson		9.0
Saleslogix Application Entities	ERPPerson	ErpPersonDetails		9.0
Saleslogix Application Entities	ERPReceivable	ErpReceivableDetail		9.0
Saleslogix Application Entities	ERPReceivable	ErpReceivableExtDetails		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Application Entities	ERPShipment	ErpShipmentDetails		9.0
Saleslogix Application Entities	ERPShipment	ErpShipmentExtDetail		9.0
Saleslogix Application Entities	ERPShipTo	AddEditERPShipTo		9.0
Saleslogix Application Entities	ERPShipTo	ErpShipToDetails		9.0
Saleslogix Application Entities	ERPShipTo	ErpShipToPersons		9.0
Saleslogix Application Entities	ExchangeRate	ExchangeRateDetails		9.0
Saleslogix Application Entities	ExchangeRate	InsertDatedExchangerate		9.0
Saleslogix Application Entities	ExchangeRate	InsertExchangeRate		9.0
Saleslogix Application Entities	Forecast	ForecastDetail		9.0
Saleslogix Application Entities	Forecast	ForecastWorksheet		9.0
Saleslogix Application Entities	Forecast	InsertForecast		9.0
Saleslogix Application Entities	Integration	IntegrationConfigGroup		9.0
Saleslogix Application Entities	Integration	IntegrationContourAbout		9.0
Saleslogix Application Entities	Integration	IntegrationDetail		9.0
Saleslogix Application Entities	Integration	IntegrationExtendedDetails		9.0
Saleslogix Application Entities	Integration	IntegrationIONWorkFlows	01	9.0
Saleslogix Application Entities	Integration	IntegrationOBMCustomSettings	01	9.0
Saleslogix Application Entities	Integration	NormalizeEntities		9.0
Saleslogix Application Entities	Integration	IntegrationUsers		9.0
Saleslogix Application Entities	IntegrationResource	EditIntegrationResource		9.0
Saleslogix Application Entities	IONWorkflowDefinition	CRMWorkflowSteps		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Application Entities	IONWorkflowDefinition	InsertIONWorkflowDefinition	01	9.0
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowDefinitionCopy		9.0
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowDetails	01	9.0
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowFieldMappings	01	9.0
Saleslogix Application Entities	IONWorkflowMapping	InsertIONWorkflowMapping		9.0
Saleslogix Application Entities	IONWorkflowMapping	IONWorkflowMappingCopy		9.0
Saleslogix Application Entities	IONWorkflowMapping	IONWorkflowMappingDetails		9.0
Saleslogix Application Entities	Lead	InsertLead		9.0
Saleslogix Application Entities	Lead	LeadDetails	01	9.0
Saleslogix Application Entities	Lead	LeadExtendedDetails		9.0
Saleslogix Application Entities	Lead	LeadSummary		9.0
Saleslogix Application Entities	LeadSource	LeadSourceDetails		9.0
Saleslogix Application Entities	LiteratureItem	InsertLiteratureItem		9.0
Saleslogix Application Entities	LiteratureItem	LiteratureItemDetails		9.0
Saleslogix Application Entities	LitRequest	LitRequestSummary		9.0
Saleslogix Application Entities	MarketoEntityMap	EntityMapDetail		9.0
Saleslogix Application Entities	MarketoEntityMap	InsertEntityMap		9.0
Saleslogix Application Entities	MarketoEntityMap	MarketoMapFields		9.0
Saleslogix Application Entities	MarketoLead	MarketoLeadDetail		9.0
Saleslogix Application Entities	MarketoMapField	AddEditMarketoFieldMapping		9.0
Saleslogix Application Entities	OAuthProvider	InsertOAuthProvider		9.0
Saleslogix	OAuthProvider	OAuthProviderDetail		9.0

Package	Entity	Form Name	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	OAuthProviderScope	AddEditProviderScope		9.0
Saleslogix Application Entities	Opportunity	EditSalesPotential		9.0
Saleslogix Application Entities	Opportunity	InsertOpportunity		9.0
Saleslogix Application Entities	Opportunity	OpportunityClosedLost		9.0
Saleslogix Application Entities	Opportunity	OpportunityClosedWon		9.0
Saleslogix Application Entities	Opportunity	OpportunityCompetitors		9.0
Saleslogix Application Entities	Opportunity	OpportunityContacts		9.0
Saleslogix Application Entities	Opportunity	OpportunityDetails		9.0
Saleslogix Application Entities	Opportunity	OpportunityProducts		9.0
Saleslogix Application Entities	Opportunity	OpportunityQuotes		9.0
Saleslogix Application Entities	Opportunity	OpportunitySummary		9.0
Saleslogix Application Entities	Opportunity	SalesOrders		9.0
Saleslogix Application Entities	OpportunityCompetitor	EditOpportunityCompetitor		9.0
Saleslogix Application Entities	OpportunityContact	EditOpportunityContact		9.0
Saleslogix Application Entities	OppportunityProduct	EditOpportunityProduct		9.0
Saleslogix Application Entities	Package	PackageDetail		9.0
Saleslogix Application Entities	PicklistAlias	AddEditPicklistAlias	01	9.0
Saleslogix Application Entities	Place	PlaceDetail		9.0
Saleslogix Application Entities	Product	ProductCPQDetails	01	9.0
Saleslogix Application Entities	Product	ProductDetails		9.0
Saleslogix	Product	ProductErpDetails	01	9.0

Package	Entity	Form Name	8.5.x	9.0
Application Entities				
Saleslogix Application Entities	Product	ProductPrices		9.0
Saleslogix Application Entities	Product	ProductSummary		9.0
Saleslogix Application Entities	ProductProgram	AddEditProductPrice		9.0
Saleslogix Application Entities	Qualification	AddEditQualification		9.0
Saleslogix Application Entities	QualificationCategory	QualificationCategoryDetail		9.0
Saleslogix Application Entities	Quota	InsertQuota		9.0
Saleslogix Application Entities	Quota	QuotaDetails		9.0
Saleslogix Application Entities	Quote	EditQuoteDetail		9.0
Saleslogix Application Entities	Quote	InsertQuote		9.0
Saleslogix Application Entities	Quote	QuoteBillTo		9.0
Saleslogix Application Entities	Quote	QuoteDetails		9.0
Saleslogix Application Entities	Quote	QuoteErpDetails		9.0
Saleslogix Application Entities	Quote	QuoteProducts		9.0
Saleslogix Application Entities	Quote	QuoteSalesPersons		9.0
Saleslogix Application Entities	Quote	QuoteShipTo		9.0
Saleslogix Application Entities	Quote	QuoteSoldTo		9.0
Saleslogix Application Entities	Quote	QuoteSummaryView		9.0
Saleslogix Application Entities	QuoteItem	EditQuoteItem		9.0
Saleslogix Application Entities	Return	InsertReturn		9.0
Saleslogix Application Entities	Return	ReturnComments	01	9.0
Saleslogix Application Entities	Return	ReturnDetails		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Application Entities	Return	ReturnExtendedDetails		9.0
Saleslogix Application Entities	Return	ReturnShipToDetail		9.0
Saleslogix Application Entities	Return	ReturnSummary		9.0
Saleslogix Application Entities	ReturnShippedProduct	AddEditReturnShippedProduct		9.0
Saleslogix Application Entities	SalesOrder	EditSalesOrderDetail		9.0
Saleslogix Application Entities	SalesOrder	InsertSalesOrder		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderBillTo		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderDetails		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderErpDetails		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderErpPersons		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderPayFrom		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderProducts		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderShipTo	01	9.0
Saleslogix Application Entities	SalesOrder	SalesOrderSoldTo		9.0
Saleslogix Application Entities	SalesOrder	SalesOrderSummaryView		9.0
Saleslogix Application Entities	SalesOrderItem	EditSalesOrderItem		9.0
Saleslogix Application Entities	Ticket	AccountServiceInfo		9.0
Saleslogix Application Entities	Ticket	AddPortalTicket		9.0
Saleslogix Application Entities	Ticket	CustomerPortalTicketActivities		9.0
Saleslogix Application Entities	Ticket	InsertTicket		9.0
Saleslogix Application Entities	Ticket	PortalTicket		9.0

Package	Entity	Form Name	8.5.x	9.0
Saleslogix Application Entities	Ticket	TicketActivities		9.0
Saleslogix Application Entities	Ticket	TicketComments		9.0
Saleslogix Application Entities	Ticket	TicketDetails		9.0
Saleslogix Application Entities	Ticket	TicketExtendedDetails		9.0
Saleslogix Application Entities	Ticket	TicketHistory		9.0
Saleslogix Application Entities	Ticket	TicketSummary		9.0
Saleslogix Application Entities	TicketActivity	AddEditTicketActivity		9.0
Saleslogix Application Entities	TicketActivityRate	InsertTicketActivityRate		9.0
Saleslogix Application Entities	TicketActivityRate	TicketActivityRateDetail		9.0
Saleslogix Application Entities	TicketActivityRate	TicketActivityRateExtendedDetail		9.0
Saleslogix Application Entities	TicketAreaOwner	InsertTicketAreaOwner		9.0
Saleslogix Application Entities	TicketAreaOwner	TicketAreaOwnerDetail		9.0
Saleslogix Application Entities	TicketAreaOwner	TicketAreaOwnerExtendedDetail		9.0
Saleslogix Application Entities	TicketProblemType	StandardProblemDetail		9.0
Saleslogix Application Entities	TicketSolutionType	StandardResolutionDetail		9.0
Saleslogix Application Entities	WorkflowStep	AddEditCRMWorkflowStep	01	9.0
Saleslogix Application Entities	WorkflowStepInstance	WorkflowStepInstanceDetail		9.0
Saleslogix Application Entities	WorkflowStepReviewerInstance	WorkflowStepApprovers	01	9.0
SLXSecuritySupport	Department	DepartmentDetails		9.0
SLXSecuritySupport	Department	InsertDepartment		9.0
SLXSecuritySupport	Owner	EditSecurityProfile		9.0
SLXSecuritySupport	Owner	ReplaceOwner		9.0
SLXSecuritySupport	Role	RoleDetails		9.0
SLXSecuritySupport	Role	SelectRole		9.0

Package	Entity	Form Name	8.5.x	9.0
SLXSecuritySupport	SecuredAction	SecuredActionDetail		9.0
SLXSecuritySupport	Team	InsertTeam		9.0
SLXSecuritySupport	Team	TeamDetails		9.0
SLXSecuritySupport	Team	TeamMembers	01	9.0
SLXSecuritySupport	User	UserChangePassword		9.0
SLXSecuritySupport	User	UserDetails		9.0
SLXSecuritySupport	User	UserEmployee		9.0
SLXSecuritySupport	User	UserSecurity		9.0
SLXSecuritySupport	User	UserServiceAndSupport		9.0
SLXSecuritySupport	User	UserSummaryView		9.0
SLXSystemSupport	OfficeProfile	EmailSetup	01	9.0
SLXSystemSupport	OfficeProfile	ErrorNotifications		9.0
SLXSystemSupport	OfficeProfile	FinancialSettings		9.0
SLXSystemSupport	OfficeProfile	Groups		9.0
SLXSystemSupport	OfficeProfile	HelpConfiguration		9.0
SLXSystemSupport	OfficeProfile	ManageCurrency		9.0
SLXSystemSupport	OfficeProfile	OfficeHours		9.0
SLXSystemSupport	OfficeProfile	OfficeProfileDetails		9.0
SLXSystemSupport	OfficeProfile	OfficeProfileSettings		9.0
SLXSystemSupport	OfficeProfile	Service Support		9.0
Saleslogix Contract Sync Entities	AppIdMapping	AddEditAccountingSystem		9.0
Saleslogix Contract Sync Entities	AppIdMapping	AddEditLink		9.0
Saleslogix Contract Sync Entities	AppIdMapping	SlxEndPointDetails		9.0
Saleslogix Contract Sync Entities	CountryCodeMapping	CountryCodeMappings		9.0
Saleslogix Contract Sync Entities	SyncJob	LogItems		9.0
Saleslogix Contract Sync Entities	SyncJob	SyncHistory		9.0
Saleslogix Contract Sync Entities	SyncJob	SyncJobDetails		9.0
Saleslogix Contract Sync Entities	SyncResult	SyncResultDetail		9.0

Quick Forms

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

Form Name	8.5.x	9.0
QFDateTimePicker (Control Rendering Template)		9.0
QFHorizontalSeparator (Control Rendering Template)		9.0
QFLabel (Control Rendering Template)		9.0
QFListBox (Control Rendering Template)		9.0
QAMultTab (Control Rendering Template)		9.0
QFRichEdit (Control Rendering Template)		9.0
QFSDataGrid (Control Rendering Template)	01	9.0
QFSDataGrid (Script Rendering Template)	01	9.0
QFSLXAddress (Control Rendering Template)	01	9.0
QFSLXCurrency (Control Rendering Template)		9.0
QFSLXEmail (Control Rendering Template)		9.0
QFSLXLookup (Control Rendering Template)		9.0
QFSLXNumeric (Control Rendering Template)		9.0
QFSLXOwner (Control Rendering Template)		9.0
QFSLXPersonName (Control Rendering Template)		9.0
QFSLXPhone (Control Rendering Template)		9.0
QFSLXPickList (Control Rendering Template)		9.0
QFSLXSDataLookup (Control Rendering Template)		9.0
QFSLXUrl (Control Rendering Template)		9.0
QFSLXUser (Control Rendering Template)		9.0
QFTextBox (Control Rendering Template)		9.0
Web Form Template		9.0

Smart Parts

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

Portal	Page	SmartPart	8.5.x	9.0
SlxClient	Contact Detail	ContactCard		9.0
SlxClient	Email Template Detail	EmailTemplateDetails	01	
SlxClient	Email Template Detail	EmailTemplateProperties	01	
SlxClient	Email Template Detail	LiveGroupViewer (Custom)	01	

Portal	Page	SmartPart	8.5.x	9.0
SlxClient	Insert Email Template	InsertEmailTemplate	01	
SlxClient	Pick Lists	AddEditPicklistAlias	01	
SlxClient	Pick Lists	PicklistAliases (Custom)	01	
SlxClient	CRM Workflow	LiveGroupViewer (Custom)	01	

Modules

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

Portal	Location	Module	8.5.x	9.0
SlxClient	Pages|Email Template Detail	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	01	

Menus

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

Portal	Menu	Menu Item	8.5.x	9.0
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	Log			9.0
SlxClient	Log	Meeting		9.0
SlxClient	Log	Note		9.0
SlxClient	Log	Phone Call		9.0
SlxClient	Log	To-Do		9.0
SlxClient	Theme			9.0
SlxClient	Theme	Colors		9.0
SlxClient	Theme	Colors|Amber		9.0
SlxClient	Theme	Colors|Amethyst		9.0
SlxClient	Theme	Colors|Azure		9.0
SlxClient	Theme	Colors|Emerald		9.0
SlxClient	Theme	Colors|Ruby		9.0
SlxClient	Theme	Colors|Slate		9.0

Portal	Menu	Menu Item	8.5.x	9.0
SlxClient	Theme	Colors|Turquoise		9.0
SlxClient	Theme	Modes		9.0
SlxClient	Theme	Modes|High Contrast		9.0
SlxClient	Theme	Modes|Dark		9.0
SlxClient	Theme	Modes|Light		9.0
SlxClient	Tools		01	

Navigation

The following lists navigation added or updated since v8.5

None added since 8.5

Navigation	Item	8.5.x	9.0

Context Menus

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

Portal	Context Menu	Menu Item	8.5.x	9.0
SlxClient	Contact List Context menu	Email		9.0
SlxClient	Area/Category/Issue	Lookup Area/Category/Issue		9.0
SlxClient	Defect Activity Rate	Lookup Defect Activity Rate		9.0
SlxClient	Event	Create New Group		9.0
SlxClient	Event	Lookup Event		9.0
SlxClient	Event	Schedule Event		9.0
SlxClient	Literature	Create New Group		9.0
SlxClient	Literature	Lookup Literature		9.0
SlxClient	Literature	Schedule Request		9.0
SlxClient	Ticket Activity Rate	Lookup Ticket Activity Rate		9.0
SlxClient	Lead List Context Menu	Email		9.0

Tasklets

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

None added since 8.5

Configuration Files

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

Portal	Location	Filename	Description	8.5.x	9.0
Infor CRM Customer Portal	SupportFiles	appSettings.config	Added an option to skip logging errors based on the http status code. The new option defaults to 404 (http not found error).	01	
Infor CRM Customer Portal	SupportFiles	appSettings.config	Update the Customer Portal help URL to the 9.0 location		9.0
SData Integration Host	SupportFiles	appSettings.config	Added an option to skip logging errors based on the http status code. 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. The new option defaults to 404 (http not found error).	01	
SlxClient	SupportFiles	appSettings.config	Update the Web Client help URL to the 9.0 location		9.0

Custom Settings

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

Custom Setting	Description	8.5.x	9.0
[Back Office Extension] CRMPriceOverrideReasonCode = NULL	The Reason Code to be added to a Discount Charge item created for a price adjustment to quote or sales order product that occurred in Infor CRM. The default value is NULL as it is implementation specific.		9.0
[Back Office Extension] ERPPriceOverrideEnabled = NULL	If set to True, users can edit the unit price of sales order and quote products in Infor CRM. Default is set to NULL which is interpreted as False		9.0

Custom Setting	Description	8.5.x	9.0
[Back Office Extension] ERPPriceOverrideReasonCode = NULL	Code to be added to a Discount Charge item created for a price adjustment to quote or sales order product that occurred in the ERP. The default value is NULL as it is implementation specific.		9.0
[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. Most implementations should be false.	01	
[Back Office Extension] PriceAdjEnabled = NULL	If set to True, users can make adjustments to unit price of sales order and quote products in Infor CRM by adjusting the unit price and discounts will be calculated based on the unit price and percentage. Default is set to NULL which is interpreted as False.		9.0
[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. By default this is set to True. If set to False, disables double-clicking a record in a list view to open that record in the detail view.	01	
[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. Most implementations should be false.	01	

Roles

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

Role	Description	8.5.x	9.0
Administrator	Updated to include new secured actions for Territory Realignment		9.0
Standard User	Updated to include new secured actions for Mail Merge.	01	

Secured Actions

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

Secure Action	Role/Description	8.5.x	9.0
Entities/Account/TerritoryRealignment	Administrator Role Ability to complete a Territory Realignment		9.0
Entites/EmailTemplate/Add	Standard Role Ability to add a Mail Merge email template.	01	
Entites/EmailTemplate/Delete	Standard Role	01	

Secure Action	Role/Description	8.5.x	9.0
	Ability to delete a Mail Merge email template.		
Entites/EmailTemplate/Edit	Standard Role Ability to edit a Mail Merge email template.	01	
Entites/EmailTemplate/View	Standard Role Ability to view Mail Merge email templates.	01	
Toolbar/Compose	Standard Role Allows access to the Compose menu on the toolbar.	01	
Toolbar/Log	None Allows access to the Log menu on the toolbar.		9.0