Applying Infor CRM SLX v9.1

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Introduction

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

About this guide

This document describes Infor CRM SLX version 9.1.

Prerequisites

The following Infor CRM SLX software must be installed before installing v9.1:

- Infor CRM SLX version 9.0

> To install Infor CRM SLX version 9.0 go to the Infor Product Download Center and follow the instructions in the *Infor CRM Implementation Guide* or the *Infor CRM 89.0 Release Notes*.

> Do not install Infor CRM SLX v9.1 on any other Infor CRM SLX version.

Additional considerations

- Infor CRM SLX 9.1 is only compatible with:
  - Sync for Gmail versions 1.2 and later
  - Sync for Exchange versions 1.0.2 and later

Contacting Infor

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

The latest documentation is available from docs.infor.com or in the KB article for your version of Infor CRM SLX. For Infor CRM SLX version 9.1 see KB 2297617. For all other versions see KB 2289845.

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

Chapter 1
What's New in this update

1

This chapter lists all breaking changes, new features, and deprecated features for Infor CRM SLX since version 9.0.

For a list of 9.1 improvements and issues fixed since v9.0 see KB article 2297617.

Breaking Changes

This section contains breaking changes introduced since Infor CRM SLX version 9.0

9.1

- ActivityAlarmOptionsPage resource files are no longer needed and have been removed
  - ActivityAlarmOptionsPage.ascx.resx
  - ActivityAlarmOptionsPage.ascx.de.resx
  - ActivityAlarmOptionsPage.ascx.fr.resx
  - ActivityAlarmOptionsPage.ascx.it.resx
  - ActivityAlarmOptionsPage.ascx.ru.resx
  - ActivityAlarmOptionsPage.ascx.zh-CN.resx
  - ActivityAlarmOptionsPage.ascx.zh-TW.resx
- Removed obsolete string, lblWeekBars.Text, in CalendarOptionsPage resource files
- Removed obsolete strings (ERPConfigureItem) for Quote and SalesOrderProduct tabs

New features

This section lists the features available in each version and indicates any additional pieces required to fully install the feature.

Application	Feature	Requires	
		BOD Pack	Infor OS
9.1			
Windows Client			
	Activities and History		
	Activities with associated records will now display in the Activities tab for each associated record in support of activities and history items created in the Web Client that may be associated to more than just contacts, accounts, opportunities, tickets, or leads.		
	History items with associated records will now display in the Notes/History tab for each associated record in support of activities and history items created in the Web Client that may be associated to		

Application	Feature	Requires	
		BOD Pack	Infor OS
	more than just contacts, accounts, opportunities, tickets, or leads.		
	Mail Merge		
	Windows Client version of mail merge will now create history associations when merging with contacts associated with accounts or opportunities.		
Web Client			
	General		
	History List view Use the History view to manage your history, including completed activities, notes, literature requests, reports, emails, and database changes. If you have additional access rights, you can also view other Infor CRM SLX users' history. You can use groups and filters to narrow the list of records in the list.		
	Database Change history items are now read-only.		
	Dragging and dropping an email to the Quote, Sales Orders, Campaign, Return, and Defect Notes/History tab now saves the email as a history record with an association to the detail view record.		
	Lead Source is now a drop-down list instead of a lookup on detail views and when adding a record.		
	Only jobs initiated by a user now display in the Job Notification dialog		
	Opportunities		
	When adding a new opportunity, you can now add an active campaign.		
	Ability to update the unit price of a zero priced opportunity product on an Opportunity just like a quote or sales order product.		
	Quotes and Sales Orders		
	When converting an opportunity to a quote or sales order, the primary associated contact is automatically added as the associated contact on the new quote or sales order.		
	The Quote and Sales Order detail views now include a Closed Date field.		
	When converting an opportunity to a quote or sales order, the primary associated contact should be the associated contact on the new quote or sales order.		
	Products		
	Reordering products On the Opportunity, Quote and Sales Order detail view Products tab you can now reorder the product line numbers using Move Up and Move Down buttons.		
	Ability to add product parts as a bundle and set a single bundle price When adding or editing Opportunity, Quote and Sales Order products, you can now associate product parts with a product. Product parts are included with the product without any impact to the price.		
	Dashboards		
	Dashboards can now be shared with departments in addition to users and teams.		
	Query Builder		
	Administrators and advanced users only In the Web Client, advanced users with permissions can now create calculated fields with an aggregation (average, count, min/max, sum) that can calculate and display rollup information. The new Condition tab allows you to define and apply a SQL condition statement to further refine		

Application	Feature	Requires	
		BOD Pack	Infor OS
	the data included in an aggregate calculated field.. For example, a column on the Accounts list view that shows the number of open tickets for each account. Calculated fields with an aggregation can only be added and edited in the Web Client Query Builder, but are also available in the Windows Client, Administrator, and Architect..		
	CRM Workflow		
	New step action types: ▪ Approve ▪ Branch ▪ Business Rule ▪ Create Activity ▪ Create Entity ▪ Create History ▪ Send Email ▪ Start Workflow ▪ Stop Workflow ▪ Test Condition ▪ Update Entity		
Web Client Administrator			
	CRM Workflow		
	The new CRM Workflow Designer tab provides a new user interface for creating, editing and managing CRM workflow steps, including new step types.		
	Job Server		
	The ability to start and stop the Job Service from the Web Client Job Manager. Common tasks have been added to Stop Job Service when it is running and Start Job Service when it is stopped.		
	Developer Tools		
	The Developer Tools menu adds the ability for administrators to: Replace this text with your own. ▪ Install a Bundle ▪ Rebuild Database Schema ▪ Rebuild Web Platform ▪ Deploy portals Infor CRM SLX Cloud environments must first request access from the Infor CRM SLX Support team. For more information see the Web Client help topic “Requesting Deploy Access”. ▪ View Bundles ▪ View Logs		

Application	Feature	Requires	
		BOD Pack	Infor OS
	The Developer Tools menu and options are not available for Oracle environments.		
	Infor CRM SLX Cloud implementations can download the Application Architect from the Web Client. Downloading the Application Architect enables Infor CRM SLX Cloud administrative users to do customizations in Application Architect in a local environment with a local database. Once Application Architect is downloaded, the admin can download the model from the specified Infor CRM SLX server. See the Web Client help topic "Downloading the Application Architect (Infor CRM SLX Cloud only)" for steps.		
	Office Profile		
	Library and Attachments folders and paths The administrator can now specify the Library and Attachment paths from the Office Profile.		
	Roles		
	■ Developer - new role that includes the secured action that grants permission to the Developer Tools menu and Install Application Architect button on the Tools, Options, General tab forInfor CRM SLX Cloud implementations.		
	Secured Actions		
	■ Entities/Attachment/Delete - grants permissions to delete attachments. It is part of the Standard User role.		
	■ Toolbar/Developer- grants permission to the Developer Tools menu and Download Application Architect button on the Tools, Options, General tab for Infor CRM SLX Cloud implementations. It is part of the new Developer role.		

Application	Feature	Requires	
		BOD Pack	Infor OS
Back Office			
	If the IONMessageCleanUpJob transits timed-out integrated entity records from AwaitingAck to OutOfSync, a Sync history record will be created with an appropriate error message.		
	CSI based price service support		
	CSI based price service support		
	Account Lookup		
	When Back Office integration is enabled, the Account lookup in Move Contact includes the ERP Customer ID.		
Application Architect			
	Upgrade safe improvements		
	Build and deploy performance script for SQL is now included in the Conversion utility.		
	Download Model		
	Infor CRM SLX Cloud implementations only Infor CRM SLX Cloud implementations can download the Application Architect from the Web Client. See the Web Client help topi Downloading the Application Architect (Infor CRM SLX Cloud only)" for steps. After downloading the Application Architect from the Web Client, downloading the model will replace the local model with the model from the specified Infor CRM SLX server. Downloading the model will overwrite any local customizations.		

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 version.

9.1

- All Telerik references have been removed. Infor CRM SLX recommends updating any customizations that used Telerik libraries.
- The bundle action Update Configuration File has been removed.
- The CRM Workflows actions Notification and Approval have been replaced with new step actions Send Email and Approve.
- Infor Ming.le is now Infor OS Portal. Sharing notes from Infor CRM SLX to Infor OS is no longer supported, therefore the Share icon has been removed from the detail views Notes/History tab.

Chapter 2 Applying v9.1

2

Apply v9.1 to all computers where the following components have already been installed:

- Administrative Tools and Servers
- Remote Office
- Infor CRM SLX Client
- Infor CRM SLX Remote Client
- Offline Web Client
- Web Host

Version 9.1 affects the following portals:

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

Before you begin

Before you apply Infor CRM SLX v9.1 please note:

- Infor CRM SLX recommends backing up your production database. Verify the backup is successful and complete before you begin applying the update.
- You must create new Remote databases after applying v9.1. For more information see "Create a Remote User or Remote Office Database" on page 12.

Installing the update

To begin the install

1. Close all Infor CRM SLX applications on the computer to which you are applying v9.1.
2. Stop all Infor CRM SLX services on the computer to which you are applying v9.1 in the following order:
   - Saleslogix Cache Server
   - Saleslogix DBEventing
   - Saleslogix Job Service
   - Saleslogix Messaging Server
   - Saleslogix SpeedSearch
   - Saleslogix Synchronization Service
   - Saleslogix Server
   - Saleslogix System Service
3. Extract the contents of the **Infor_CRM_SLX_v9.1_Update.zip** file to a temporary folder.
4. Navigate to the folder where you extracted the files and double-click **Infor_CRM_SLX_v9.1_Update.exe**.
5. On the **Infor CRM SLX - v9.1.0 Web Update 00** screen do the following:
   - Select the **Extract and Install the Infor CRM SLX Update** option and in the **Copy files to folder** box, use the default location or specify another location.
     The v9.1 files, including the VFS bundle, are extracted to a the specified folder and are not removed once the installation is complete, which allows you to reinstall the update if necessary. If the specified folder does not exist is will be created for you.
6. Click **Next**.
7. On the **Welcome** screen, click **Install** to install the patch.
8. If prompted to reboot, click **OK** to allow the reboot.
9. On the **Completed** screen, click **Finished**.

(Oracle only) Replace the Sage.SalesLogix.SchemaSupport.dll

For Oracle implementations only, you must replace the Sage.SalesLogix.SchemaSupport.dll

To replace

1. Browse to **Program Files (x86)\Saleslogix\Saleslogix** folder
   Do not close the \Program Files (x86)\Saleslogix\Saleslogix folder
2. Move the **Sage.SalesLogix.SchemaSupport.dll** to a temporary location.
3. On the install media browse to and open the **Extra Files** folder.
4. Copy the **Sage.SalesLogix.SchemaSupport.dll** and paste it in the **Program Files (x86)\Saleslogix\Saleslogix** folder.

Installing bundles using the Administrator

Use the Administrator to install the Infor CRM SLX v9.1.sxb bundle.

To install the bundle

1. Open the **Administrator**.
2. On the **Navigation Bar**, click **Bundles**.
3. Click **Install**.

4. Navigate to the folder where you extracted the v9.1 files and double-click the bundle named **Infor CRM SLX v9.1.sxb**.
5. After the bundle is loaded, the **Choose Actions to Install** dialog box appears. View the plugins to be installed with this release, and then click **OK**.
6. During installation, click **Yes**, **Yes to All**, or **OK** on any confirmation message boxes for overwriting system plugins or indexes.

Installing .zip bundles

Install .zip bundles using the Application Architect.

To install VFS bundles

1. Navigate to the bundle installation folder where the bundle was extracted when "Installing the update".
2. Ensure the bundle is not blocked.
   a. Right-click the bundle file and click **Properties**.
   b. On the **General** tab, if there is an **Unblock** button, click it to unblock the file.
      The Unblock button only displays if the file is locked.
   c. Click **Apply**.
   d. Click **OK**.
3. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
4. Open the **Application Architect**.
5. On the **View** menu, click **Bundle Manager**.
6. Click **Install**.
7. Select **File name** and navigate to the folder specified when applying the update (see step 5 of "Installing the update" on page 8), click **ICRM SLX v9.1 Web VFS.zip**, and then click **Open**.
8. On the **Select Bundle** screen, click **Next**.
9. Click **Finish**.
10. Rebuild the database schema.
    - On the **Tools** menu, click **Rebuild Database Schema**.

11. Install the **ICRM SLX v9.1 Web Actions** bundle.
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name** and navigate to the folder specified when applying the update (see step 5 of "Installing the update" on page 8), click **ICRM SLX v9.1 Web Actions.zip**, and then click **Open**.
    d. On the **Select Bundle** screen, click **Next**.
    e. On the **Select Actions** screen, click **Next**.
    f. On the **Release Plugins** dialog box, click **OK** to release the plugins to Everyone.
    g. Click **Finish**.
12. (Oracle only) Install the **INFORCRM-29732.zip** bundle:
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name**, navigate to the install media **Extra Files** folder and select **INFORCRM-29732.zip**.
    d. On the **Select Bundle** screen, click **Next**.
    e. Click **Finish**.

Microsoft SQL 2014 or 2016 additional steps for Conversion Utility

Required for Microsoft SQL 2014 or 2016 environments only. A different version of the conversion utility is required for the specified environments.

To apply

1. Browse to **\Program Files (x86)\Saleslogix**.
2. Cut the **ConversionUtility_9.1.exe** and **ConversionUtility_9.1.exe.config** and paste them to a temporary folder. Do not close the \Program Files (x86)\Saleslogix folder
3. Navigate to the folder where you extracted the files.
4. Open the **Extra Files** folder and copy the **ConversionUtility_9.1.exe** and **ConversionUtility_9.1.exe.config** and paste it to the **\Program Files (x86)\Saleslogix** folder.

Running the Conversion Utility

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

The conversion utility includes the following non-optional items:

- VFS performance script. This script contains:
    - SET NOCOUNT ON in triggers where it is missing.
- Build and deploy performance script for SQL. If multiple rows are deleted at once, the delete triggers now use IN instead of equal statements.

The Conversion Utility also contains these options:

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

You do not have to select this option if you already ran this option during a previous version.

- **Isolate integrated content by Logical ID**
  This option is only for rare implementations based on two or more host ERP systems with data defined using a common ERP Accounting Entity. For most implementations this option should not be selected.
  This is a non-reversible option that extends the internal format of the Infor CRM SLX tracking of unique ID values assigned by the host ERP system to include an internal BackOfficeID value
- **Update Favorite Groups**
  This option sets the new groups that are provided as Favorites so that they display by default in the list and detail views.
- **Upgrade CRM Workflows**
  This option upgrades existing CRM Workflows to the new version of CRM Workflows implemented in version 9.1.

To run

1. On the Administrative Workstation, browse to the ConversionUtility.config file.
   By default, this is in \Program Files (x86)\Saleslogix.
2. Open **ConversionUtility_9.1.exe.config** with the text editor of your choice.
3. Scroll to the <connectionStrings> section and change the **Initial Catalog** value to your Connection Manager name.
   For example:
   Change the value from: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=SALESLOGIX;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>

   Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabase;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/>
4. Save your changes.
5. Double click the **ConversionUtility_9.1.exe** application.
6. In the Conversion Utility interface, clear any actions you do not want to run and click **Update**.
7. When finished, click **Close**.

Building and deploying the Web changes

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

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

To build and deploy

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

6. Under **Deployment Targets**, right-click the target portal, and click **Deploy Portal**.

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

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

Create a Remote User or Remote Office Database

In Infor CRM SLX v9.1, 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 SLX 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 SLX 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.

Disable Windows Authentication for Remote Office

Windows Authentication must be manually disabled for the Remote Office SlxClient and SData portals in IIS.

To disable Windows Authentication in IIS

1. Open **Internet Information Services (IIS) Manager**.
2. Select the **SlxClient** virtual directory and double- click **Authentication**.
3. In the **Authentication** view, right-click **Windows Authentication** and click **Disable**.
4. Repeat steps **2** and **3** for the **sdata** virtual directory.

Feature Differences for Web Remote Offices and Web Offline Client

The following new features are not supported for Web Remote Offices or Offline Web Clients:

- Administrator: the Developer Tools menu is available, but none of the options are supported and they will fail with errors.
- CRM Workflows
  - In the Application Architect, exposing an entity to Workflows not sync to remotes.
  - CRM workflows created in a Web Remote Office do not sync back to the host, however CRM workflows created on the host do sync to remotes.
  - CRM workflows execute directly on the Web Remote Office or Offline Web Client and then synchronizes back to the host to avoid duplicate data.

Chapter 3
Changes in this release

3

This chapter lists all of the changes to Infor CRM since version 9.0.

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

Entities and Properties	Relationships	Views	Tables (not in Entity Model)
Inserted Records	Triggers	Filters	Indexes
Events	Business Rules	Database Objects (.sxb)	Database Objects (VFS)
Plugins	Reports	Picklists	Windows Forms
Web Forms	Quick Forms	Smart Parts	Modules
Menus	Navigation	Context menus	Tasklets
Configuration files	Custom Settings	Roles	Secured Actions
Deprecated items			

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/Tables and Fields

The following lists entities and properties added or updated since v9.0.

Entity	Property	Description	Version
Account	ClosedDate	Used to store the date the account was closed	9.1
Account	ReasonLost	Used to store the reason an account was closed	9.1
AccountProduct	ContactID	Exposed through the entity model	9.1
CalculatedFieldData	Aggregate	Stores the aggregate function name, options include Average, Count, Max, Min, Sum	9.1
CalculatedFieldData	Condition	Free form SQL which will be applied as a condition to the computed column	9.1
EmailTemplatePropertyView		Combines the EmailTemplate and EmailTemplateProperty tables	9.1
IONWorkflow	EntityName	Character limit increased from 64 to 512 characters	9.1
IONWorkflowDefinition	EntityName	Character limit increased from 64 to 512 characters	9.1
OpportunityProduct	LineType	Added to track zero priced products	9.1
Product	IsBundle	Indicates if the product contains product parts	9.1
ProductPart		New table to contain a relationship between a product and any association products (parts) it may have	9.1
ProductPart	ProductPartID	Product Part entity/table primary key	9.1
ProductPart	ProductID	Foreign key reference to the Product entity/table	9.1
ProductPart	CreateUser	User who created the record	9.1
ProductPart	CreateDate	The date the record was created	9.1
ProductPart	ModifyUser	User who modified the record	9.1

Entity	Property	Description	Version
ProductPart	ModifyDate	The date the record was last modified	9.1
ProductPart	LineNumber	Line sequence number for the part	9.1
ProductPart	Quantity	The number of a part to be included	9.1
ProductPart	ParentPartID	Foreign key reference to the parent product in the Product entity/table	9.1
QuoteAddress		Entity exposed to workflow	9.1
Return		Entity exposed to workflow	9.1
SYSTEMINFO	AllowWebDeploy	Used identify if an Infor CRM SLX ST Cloud implementation allows remote deployment	9.1
SYSTEMINFO	IsInforSTCloud	Used to identify if server is an Infor CRM SLX ST Cloud implementation	9.1
Ticket	ContactId	Exposed property	9.1
WorkflowStep	TimeoutIncrement	Previously stored the timeout time increment, for example "days". This data has been moved to a new field StepData, a JSON string defining the step configuration	9.1
WorkflowStep	ToEmailAddress	Previously stored the To email address for a Notification CRM workflow step. This data has been moved to a new field StepData, a JSON string defining the step configuration.	9.1
WorkflowStep	CCEmailAddress	Previously stored the CC email address for a Notification CRM workflow step. This data has been moved to a new field StepData, a JSON string defining the step configuration.	9.1
WorkflowStep	BCCEmailAddress	Previously stored the BCC email address for a Notification CRM workflow step. This data has been moved to a new field StepData, a JSON string defining the step configuration.	9.1

Entity	Property	Description	Version
WorkflowStep	ApprovalCriteria	Previously stored the percent or number of approvers required for a CRM workflow Approve step. This data has been moved to a new field StepData, a JSON string defining the step configuration.	9.1
WorkflowStep	StepData	A new field to store the JSON string defining the step configuration.	9.1
WorkflowStepInstance	TimeoutIncrement	Previously stored the timeout time increment. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	NotificationSubject	Previously stored the tokenized notification subject. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	NotificationTemplate	Previously stored the tokenized notification template information. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	BCCEmailAddress	Previously stored the tokenized values from the workflow definition. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	CCEmailAddress	Previously stored the tokenized values from the workflow definition. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	ToEmailAddress	Previously stored the tokenized values from the workflow definition. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1

Entity	Property	Description	Version
WorkflowStepInstance	ApprovalCriteria	Previously stored the approval criteria for the workflow step. This data has been moved to a new field StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	StepData	New field that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	WorkflowStepId	Foreign Key to the WorkflowStep table.entity.	9.1
WorkflowStepTarget		New table is used to determine step flow. For a given result, what is the next step to execute.	9.1
WorkflowStepTarget	WorkflowStepTargetId	The primary key.	9.1
WorkflowStepTarget	WorkflowStepId	The current step.	9.1
WorkflowStepTarget	TargetResult	The previous step result required to advance to the target step.	9.1
WorkflowStepTarget	TargetStepId	The ID of the next step in the workflow.	9.1

Relationships

The following lists relationships added or updated since v9.0.

Parent	Relationship	Child	Version
Product.ProductPart	M:1	Product Part.Product	9.1
Product.ProductParts	1:M	Product Part.ParentProduct	9.1
Workflow Step.WorkflowStepInstances	1:M	Workflow Step Instance.WorkflowStep	9.1
Workflow Step.WorkflowStepTargets	1:M	Workflow Step Target. WorkflowStep	9.1

Views

None added since 9.0

Tables with no Corresponding Entity in the Entity Model

The following lists tables or fields that do not correspond to an entity in the Entity model that have been added or updated since v9.0.

Table	Property/Field	Description	Read Only	Version
VirtualFileSystemView		Table added to improve performance of reading the model.		9.1

Inserted Records

None added since 9.0

Triggers

The following lists triggers added or updated since v9.0.

Table	Trigger	Version
VFSDATA	VFSDATA_DELETES	9.1
VFSDATA	VFSDataChange	9.1
VIRTUALFILESYSTEM	VFS_DELETES	9.1
VIRTUALFILESYSTEM	VFSChange	9.1

Filters

The following lists filters added or updated since v9.0.

Package	Entity	Filter	Version
Saleslogix Activity Support	History	Account	9.1
Saleslogix Activity Support	History	Attachment	9.1
Saleslogix Activity Support	History	CompletedBy	9.1
Saleslogix Activity Support	History	CompleteToDate	9.1
Saleslogix Activity Support	History	Name	9.1
Saleslogix Activity Support	History	Type	9.1
Saleslogix Activity Support	History	User	9.1

Create Indexes

The following lists indexes added since in v9.0.

Index Name	Version
APPLICATIONBUILDERREQUEST.APPLICATIONBUILDREQUEST_STATUS	9.1
APPLICATIONBUILDERREQUEST.APPLICATIONBUILDREQUEST_TYPE	9.1

Events

The following lists events added or updated since v9.0.

Package	Entity	Event	Version
Saleslogix Application Entities	CustomSetting	OnCreate	9.1
Saleslogix Application Entities	LeadSource	OnBeforeDelete	9.1
Saleslogix Application Entities	ProductPart	OnBeforeInsert	9.1
Saleslogix Application Entities	ProductPart	OnCreate	9.1

Business Rules

The following lists business rules added or updated since v9.0.

Package	Entity	Business Rule	Version
Saleslogix Activity Support	Activity	IsSyncOnlyNewCRMCalendarItems	9.1
Saleslogix Activity Support	History	SetEntityDetailsToSession	9.1
Saleslogix Application Entities	Address	GetFullAddress	9.1
Saleslogix Application Entities	EmailTemplate	GetApprovalTokens	9.1
Saleslogix Application Entities	EmailTemplate	GetSubjectTokens	9.1
Saleslogix Application Entities	EmailTemplate	GetTemplateTokens	9.1
Saleslogix Application Entities	IONWorkflowDefinition	DeleteStep	9.1
Saleslogix Application Entities	IONWorkflowDefinition	EditStepDetail	9.1
Saleslogix Application Entities	IONWorkflowDefinition	GetApprovalTokens	9.1
Saleslogix Application Entities	IONWorkflowDefinition	GetNotificationTokens	9.1
Saleslogix Application Entities	IONWorkflowDefinition	GetSubjectTokens	9.1
Saleslogix Application Entities	IONWorkflowDefinition	LoadWorkflowDesign	9.1
Saleslogix Application Entities	IONWorkflowDefinition	RefreshWorkflowProperties	9.1
Saleslogix Application Entities	IONWorkflowDefinition	SaveWorkflowDesign	9.1
Saleslogix Application Entities	LeadAddress	GetFullAddress	9.1
Saleslogix Application Entities	OpportunityProduct	CalculateZeroProductBasePriceChange	9.1
Saleslogix Application Entities	OpportunityProduct	CalculateZeroProductDocPriceChange	9.1
Saleslogix Application Entities	OpportunityProduct	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	OpportunityProduct	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	ProductPart	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	ProductPart	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	QuoteItem	ReOrderDownLineNumbers	9.1

Package	Entity	Business Rule	Version
Saleslogix Application Entities	QuoteItem	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	SalesOrderItem	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	SalesOrderItem	ReOrderUpLineNumbers	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployAllPortals	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortals	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortalsByInstanceId	9.1
Saleslogix System Support	ApplicationBuilderRequest	GenerateEmlRequest	9.1
Saleslogix System Support	ApplicationBuilderRequest	GetBundles	9.1
Saleslogix System Support	ApplicationBuilderRequest	GetDeployments	9.1
Saleslogix System Support	ApplicationBuilderRequest	GetLogContent	9.1
Saleslogix System Support	ApplicationBuilderRequest	GetLogs	9.1
Saleslogix System Support	ApplicationBuilderRequest	InstallBundle	9.1
Saleslogix System Support	ApplicationBuilderRequest	RebuildDBSchema	9.1
Saleslogix System Support	ApplicationBuilderRequest	RebuildWebPlatform	9.1

Database Objects – .sxb bundle

The following lists .sxb bundle database objects added or updated since v9.0.

Database Object	Version
ACTIVITYATTENDEE_INTEGRATION_CHANGE : MSSQL ; Trigger	9.1

Database Objects – Web Actions bundle

The following lists Web Actions bundle database objects added or updated since v9.0.

Database Object	Version
CreateNew_CalculatedFieldData_Schema (MSSQL)	9.1
CreateNew_CalculatedFieldData_Schema (Oracle)	9.1
Delete_Obsolote_SyncHistoryForms(All)	9.1
InsertSecTableDef_CalcualtedField_Records (All)	9.1
UpdateSystemInfo (All)	9.1
UpdateSystemInfoCoreVersion (All)	9.1

Plugins

The following lists plugins added or updated since in v9.0.

Plugin Name	Version
(Forms Opportunity:Notes-History)	9.1
(Forms Account:Notes-History)	9.1
(Forms Lead:Notes-History)	9.1
(Forms Contact:Notes-History)	9.1
[Group] HISTORY:All History (Infor 9.1)	9.1
[Group] HISTORY:Completed Activities (Infor 9.1)	9.1
[Group] HISTORY:DatabaseChanges (Infor 9.1)	9.1
[Group] HISTORY:My Completed Activities (Infor 9.1)	9.1
[Group] HISTORY:My Notes (Infor 9.1)	9.1
[ResponsiveDashboardPage] System:My Dashboard (Infor 9.1)	9.1
Scripts, VBscript System:Notes History Common	9.1

Execute SQL statements

The following lists SQL statements added since v9.0.

Description	Version
UPDATE SYSDBA.SYSTEMINFO set DBVERSION - '9.1'	9.1
UPDATE SYSDBA.SYSTEMINFO set SNCVERSION - '9.1.0.0'	9.1

Reports

None added since 9.0

Picklists

None added since 9.0

Windows Forms

None added since 9.0

Web Forms

The following lists Web forms added or updated since v9.0.

Package	Entity	Form Name	Version
Saleslogix Application Entities	Account	AccountDetails	9.1
Saleslogix Application Entities	Account	AccountErpDetails	9.1
Saleslogix Application Entities	Account	AcountExtendedDetails	9.1
Saleslogix Application Entities	Account	ClosedLost	9.1
Saleslogix Application Entities	Account	InsertAccount	9.1
Saleslogix Application Entities	AccountProduct	AddEditAccountProduct	9.1
Saleslogix Application Entities	EmailTemplate	EmailTemplateProperties	9.1
Saleslogix Application Entities	IONWorkflow	ActiveIONWorkflows	9.1
Saleslogix Application Entities	IONWorkflowDefinition	CRMWorkflowProperties	9.1
Saleslogix Application Entities	IONWorkflowDefinition	CRMWorkflowSteps	9.1
Saleslogix Application Entities	IONWorkflowDefinition	InsertIONWorkflowDefinition	9.1
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkFlowDetails	9.1
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowFieldMappings	9.1
Saleslogix Application Entities	Lead	InsertLead	9.1
Saleslogix Application Entities	Lead	LeadDetails	9.1
Saleslogix Application Entities	OpportunityProduct	EditOpportunityProduct	9.1

Package	Entity	Form Name	Version
Saleslogix Application Entities	Product	ProductDetails	9.1
Saleslogix Application Entities	Product	ProductParts	9.1
Saleslogix Application Entities	Quote	InsertQuote	9.1
Saleslogix Application Entities	Quote	QuoteDetails	9.1
Saleslogix Application Entities	Quote	QuoteExtendedDetails	9.1
Saleslogix Application Entities	Quote	QuoteProducts	9.1
Saleslogix Application Entities	QuoteItem	EditQuoteItem	9.1
Saleslogix Application Entities	SalesOrder	InsertSalesOrder	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderDetails	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderExtendedDetails	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderProducts	9.1
Saleslogix Application Entities	SalesOrderItem	EditSalesOrderItem	9.1
Saleslogix Application Entities	Ticket	InsertTIcket	9.1
Saleslogix Application Entities	WorkflowInstance	WorkflowInstances	9.1
Saleslogix Application Entities	WorkflowInstance	WorkflowStepInstances	9.1
Saleslogix Application Entities	WorkflowStepInstance	WorkflowStepInstanceDetail	9.1
Saleslogix Application Entities	Integration	IntegrationIONWorkFlows	9.1
Saleslogix Application Entities	Opportunity	InsertOpportunity	9.1
Saleslogix Application Entities	Opportunity	OpportunityDetails	9.1
Saleslogix Application Entities	Opportunity	OpportunityProducts	9.1
Saleslogix Security Support	Teams	TeamMembers	9.1
Saleslogix Security Support	Users	UserDetails	9.1
Saleslogix System Support	OfficeProfile	DocumentPaths	9.1
Saleslogix Contract Sync Entities	Sync Result	SyncResults	9.1

Quick Forms

The following lists new or updated quick forms added since v9.0

Form Name	Version
QFDateTimePicker (Control Rendering Template)	9.1
QFSDataGrid (Script Rendering Template)	9.1
QFSLXDependencyLookup (Control Rendering Template)	9.1
QFSLXDurationPicker (Control Rendering Template)	9.1
QFSLXLookup (Control Rendering Template)	9.1
QFSLXOwner (Control Rendering Template)	9.1

Form Name	Version
QFSLXPersonName (Control Rendering Template)	9.1
QFSLXTimeZone (Control Rendering Template)	9.1
QFSLXUrl (Control Rendering Template)	9.1
QFSLXUser (Control Rendering Template)	9.1

Smart Parts

The following lists smart parts added or updated since v9.0.

Portal	Page	SmartPart	Version
SlxClient	Account Detail	ClosedLost	9.1
SlxClient	Account Detail	SyncResults	9.1
SlxClient	Account Detail	WorkflowInstances	9.1
SlxClient	Bill To Details	SyncResults	9.1
SlxClient	Contact Detail	ContactCard	9.1
SlxClient	Contact Detail	SyncResults	9.1
SlxClient	Contact Detail	WorkflowInstances	9.1
SlxClient	Email Template Details	EmailTemplateDetails	9.1
SlxClient	ERP Invoice Detail	WorkflowInstances	9.1
SlxClient	History Groups	LiveGroupViewer (Custom)	9.1
SlxClient	Lead Detail	WorkflowInstances	9.1
SlxClient	Lead Source Detail	WorkflowInstances	9.1
SlxClient	OfficeProfile	DocumentPaths	9.1
SlxClient	Opportunity Detail	SyncResults	9.1
SlxClient	Product Detail	ProductParts	9.1
SlxClient	Quote Detail	SyncResults	9.1
SlxClient	Return Detail	WorkflowInstances	9.1
SlxClient	Sales Order Detail	SyncResults	9.1
SlxClient	Ship To Details	SyncResults	9.1
SlxClient	Ticket Detail	WorkflowInstances	9.1
SlxClient	User Detail	WorkflowInstances	9.1
SlxClient	WorkflowDefinition	CRMWorkflowDesigner (Custom)	9.1

Modules

The following lists modules added or updated since v9.0.

Portal	Location	Module	Version
SlxClient	Pages|History Groups|Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewer Module	9.1
SlxClient	Modules	Sage.SalesLogix.Web.Modules.DeveloperToolsModule	9.1

Menus

The following lists menus added or updated since v9.0.

Portal	Menu	Menu Item	Version
SlxClient	Developer Tools		9.1
		Deploy	9.1
		Install Bundle	9.1
		Rebuild Database Schema	9.1
		Rebuild Web Platform	9.1
		Request Deploy Access	9.1
		View Bundles	9.1
		View Logs	9.1

Navigation

The following lists navigation added or updated since v9.0

None added since 9.0

Portal	Navigation	Item	Version
SlxClient	Marketing	History	9.1
SlxClient	Sales	History	9.1
SlxClient	Service	History	9.1
SlxClient	Support	History	9.1

Context Menus

The following lists context menus added or updated since v9.0

Portal	Context Menu	Menu Item	Version
SlxClient	History	Create New Group	9.1
SlxClient	History	Lookup History	9.1
SlxClient	History Group List Context Menu	Save Records as Group	9.1

Portal	Context Menu	Menu Item	Version
SlxClient	History Group List Context Menu	Go To	9.1
SlxClient	History Group List Context Menu	Log	9.1
SlxClient	History Group List Context Menu	Open History	9.1
SlxClient	History Group List Context Menu	Add to Existing Group	9.1
SlxClient	History Group List Context Menu	Remove from Group	9.1

Tasklets

None added since 9.0

Configuration Files

The following lists configuration files added or updated since v9.0.

Portal	Location	Filename	Description	Version
SData Integration Host	SupportFiles	web.config	Binding Redirect added for: System.Runtime.CompilerServices.Unsafe Added reference to ApplicationBuilder service for downloadable Application Architect.	9.1
SlxClient	SupportFiles	appSettings.config	Change for Help Domain URL	9.1
SlxClient	SupportFiles	web.config	Binding Redirect added for: System.Runtime.CompilerServices.Unsafe Added reference to ApplicationBuilder service for downloadable Application Architect.	9.1
Infor CRM Customer Portal	SupportFiles	appSettings.config	Change for Help Domain URL	9.1
Infor CRM Job Service	SupportFiles	tenant.config	Binding Redirect added for: System.Runtime.CompilerServices.Unsafe	9.1
SlxModelDownload	SupportFiles	log4net.config	In support of the new SLXModelPortal for the downloadable Application Architect.	9.1
SlxModelDownload	SupportFiles	Web.config	In support of the new SLXModelPortal for the downloadable Application Architect.	9.1

Custom Settings

None added since 9.0

Roles

The following lists roles updated or added since in v9.0.

Role	Description	Version
Administrator	Allows add, edit, and delete permissions to administration functions such as users, teams, departments, pick lists, products, packages, Check for Duplicates, Process Duplicates, and Check for Duplicates History. Also gives edit permission for quick forms in the Web Form Designer. Updated to include: ▪ Entities/Attachment/Delete	9.1
Developer	New role that includes the secured action that grants permission to the Developer Tools menu and Install Application Architect button on the Tools, Options, General tab for Infor CRM SLX Cloud implementations.	9.1
Order and Quote Processor	Allows add and view permissions to contacts and accounts and add, edit, and delete permissions to sales orders. Updated to include: ▪ Entities/Opportunity/RePriceOpportunity	9.1
Standard User	Allows view, add, edit, and delete permissions to Web Client non-administrative entities such as accounts, contacts, opportunities, sales orders, leads, contracts, defects, and tickets. Also allows view permissions for products and packages. If you have existing users or create new users in the Administrator, you must assign users to the Standard User role. Updated to include: ▪ Entities/Attachment/Delete	9.1

Secured Actions

The following lists secured actions added or updated since in v9.0.

Secure Action	Role/Description	Version
Entities/Attachment/Delete	Standard User role: grants permissions to delete attachments.	9.1
Toolbar/Developer	Developer role:grants permission to the Developer Tools menu and Download Application Architect button on the Tools, Options, General tab for Infor CRM SLX Cloud implementations.	9.1