Applying Infor CRM SLX v9.4

Important Notices

Trademark Acknowledgements

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, and Support automation solutions.

About this guide

This document describes Infor CRM SLX version 9.4.

Prerequisites

The following Infor CRM SLX software must be installed before installing v9.4:

- 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 9.0 Release Notes*.

Do not install Infor CRM SLX v9.4 on any other Infor CRM SLX version prior to v9.0.

Additional considerations

- Infor CRM SLX 9.4 is only compatible with:
  - Sync for Gmail version available in KB2329926.
  - Sync for Exchange version available in KB 2329821.
- The steps for installing the patch have changed. Please follow the steps as written in section "Installing the update" on page 19.

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 9.4 see KB3565843. 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 9.4 improvements and issues fixed since v9.0 see KB article KB3565843.

Breaking Changes

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

9.4

There are no breaking changes in this release.

9.3

A new string parameter, "oldValue" was added to the following methods:

- UpdateWebAddressChanges
- UpdateMainPhoneChanges
- UpdateFaxChanges

9.2

There are no breaking changes in version 9.2

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 business logic from code snippet into the code generation of the form
  - \Entity Model\Saleslogix Application Entities\Quote\QuickForms\QuoteDetails.OnLoad1.method.xml
  - \Entity Model\Saleslogix Application Entities\Quote\QuickForms\Sage.SnippetLibrary.CSharp.@.629d230d-5e07-425f-b494-cf424afbd6fa.codesnippet.cs
  - \Entity Model\Saleslogix Application Entities\SalesOrder\QuickForms\SalesOrderDetails.OnLoad1.method.xml
  - \Entity Model\Saleslogix Application Entities\SalesOrder\QuickForms\Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs
- 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
9.4	
General enhancements	
	■ Mail Merge template management is now available in the Infor CRM SLX Mail Merge for Microsoft Word add-in and requires installing the Infor CRM SLX Mail Merge for Microsoft Word add-in. This impacts the Architect and Windows client. ■ Templates created in a version of Infor CRM SLX prior to 8.5.0.01 or in the Infor CRM SLX Windows client or Architect after version 8.5.0.01 must be converted to .docx files. See the Web Client help topic "Converting legacy Mail Merge Micorsoft Word templates". The Web Client help system can be accessed from the Infor CRM SLX Mail Merge for Microsoft Word add-in Manage Templates help button.
SpeedSearch	
	■ Ticket indexes were updated to include searching on: Account Name, Contact Name, and Ticket Pretty Key ■ Ticket Internal index was updated to include both Customer and Internal tickets ■ New index for Notes enables search for History records with a History.Type of Note (262148).
Administrator	
	■ Mail Merge Output to Fax is no longer supported. The Write menu, Fax Using Template option was removed in the Infor CRM SLX Windows client. The option is still visible on the User Profile Function Security tab, but it will not display in the Windows client.
Architect	
	■ Mail Merge template management is now available in the Infor CRM SLX Mail Merge for Microsoft Word add-in and requires installing the Infor CRM SLX Mail Merge for Microsoft Word add-in. This also affects: ■ Contact Processes ■ Sales Processes

<table>
<tr><th>Application</th><th>Feature</th></tr>
<tr><td colspan="2">Windows Client</td></tr>
<tr><td></td><td>Mail Merge</td></tr>
<tr><td></td><td>■ Mail Merge and mail merge template management remain available on the Write menu, but now takes place in Microsoft Word and requires the Infor CRM SLXMail Merge for Microsoft Word add-in to be installed. This also affects:
■ Contact Processes
■ Literature Requests
■ Sales Processes</td></tr>
<tr><td colspan="2">Web Client</td></tr>
<tr><td></td><td>General</td></tr>
<tr><td></td><td>■ The default font size is now 16pt which corresponds to the browser default and font size will now increase or decrease based on the browser setting.</td></tr>
<tr><td></td><td>■ When hovering over a read-only or disabled field the border is hidden.</td></tr>
<tr><td>Updated form*</td><td>■ In the Activity dialog box, if the Notes field is resized, it will remain resized whenever the activity is viewed.</td></tr>
<tr><td></td><td>Contour</td></tr>
<tr><td>Updated forms*</td><td>■ Contour is now available for leads and opportunities. You can view leads and opportunities on a Contour map or perform a proximity search for leads and opportunities.</td></tr>
<tr><td></td><td>CRM Workflows</td></tr>
<tr><td></td><td>■ CRM Workflows may now include Mail Merge and Run Report steps. See the Web Client help topic "What are CRM Workflows?"</td></tr>
<tr><td></td><td>Dashboards</td></tr>
<tr><td>New forms*</td><td>■ Dashboard tabs can be hidden.</td></tr>
<tr><td></td><td>Back Office</td></tr>
<tr><td>Updated form*</td><td>■ In a Back Office integrated environment the Quote and Sales Order Edit Product ERP Details notes can now be viewed in the Notes field, with the option to view extended notes by clicking the notes icon.</td></tr>
<tr><td></td><td>■ There is improved documentation for Price overrides and price adjustments for integrated quote or sales order unit pricing if permitted by your administrator. See the Web Client help topic “Integrated Pricing Tab for Sales Order or Quote Products (Back Office Extension)“.</td></tr>
<tr><td colspan="2">Web Client Administrator</td></tr>
<tr><td></td><td>CRM Workflow</td></tr>
<tr><td></td><td>■ New step types for:
■ Mail Merge
See the Web Client help topic "Defining the mail merge workflow step".
■ Run Report, including an option to send the report by email.
See the Web Client help topic "Defining the Run Report workflow step.</td></tr>
<tr><td></td><td>■ The Recipients tab in the CRM Workflow Approve, Mail Merge, Run Report, and Send Email step actions has been redesigned and updated to:
■ Simplify the selection of user and owner fields.
■ Include an option to send an email or approval to a user’s manager.</td></tr>
<tr><td></td><td>■ A Refresh button has been added to the CRM Workflow Definition Properties tab.</td></tr>
</table>

<table>
<tr><th>Application</th><th>Feature</th></tr>
<tr><td></td><td>CRM Workflows can now set the Quote or Sales Order status to “Pending Approval” as part of an approval process that can lock down the forms until the approval process is complete.</td></tr>
<tr><td></td><td>Developer Tools</td></tr>
<tr><td>New forms*</td><td>Ability to manage deployments from the Developer Tools menu, Manage Deployments menu item.
See the Web Client help topic "Deployment Manager".</td></tr>
<tr><td></td><td>Lead Capture</td></tr>
<tr><td>New forms*</td><td>The new Lead Capture Configuration view provides the ability to capture lead information from a web page and save that information in Infor CRM SLX via a handler that can be added as a post action on a link or button.
See the Web Client help topic "What is Lead Capture?"</td></tr>
<tr><td></td><td>Office Profile</td></tr>
<tr><td>Updated form*</td><td>Currency tab
New Currency Control Decimal Digits option to determine the number of decimal places to display in currency controls, tab grid columns, and list view currency columns that are not formatted. Formatted currency columns will use the specified format.
The layout was updated.
See the Web Client help topic "Managing Currency".</td></tr>
<tr><td></td><td>Entity Manager</td></tr>
<tr><td>Updated form*</td><td>Ability to set the Workflow attribute for entities in Entity Manager.</td></tr>
<tr><td></td><td>Secured Actions</td></tr>
<tr><td></td><td>Administration/LeadCaptureConfiguration/View: grants permission to view the Lead Capture Configuration view. Added to Administrator role.</td></tr>
<tr><td></td><td>Administration/LeadCaptureConfiguration/Edit: grants permission to edit the Lead Capture Configuration view. Added to Administrator role</td></tr>
<tr><td></td><td>Contour/Map/Lead: Allows searching for and viewing leads on a map. Added to the Contour role.</td></tr>
<tr><td></td><td>Contour/Map/Opportunity: Allows searching for and viewing opportunities on a map. Added to the Contour role.</td></tr>
</table>

Application	Feature
	■ Import/History/View: Allows access to the Import History view. Added to the Standard user role.
	Custom Settings
	■ (New) MfaWinAuthNextUrlSkipList: A comma delimited list of pages that should cause the WinAuthLoad.aspx page to ignore the next_url and to redirect to the Default.aspx page
	■ (New) MfaFormsAuthReturnUrlSkipList: A comma delimited list of pages that should cause the Login.aspx page to ignore the ReturnUrl and redirect to the Default.aspx page instead
	■ (New) SyncWorkerJobLimit: Specifies the allowed number of concurrent worker jobs for calendar and contact sync.
	■ (Updated) WriteInProducts: The category was changed from Back Office Extension to Saleslogix since this applies generally to Infor CRM SLX and is not limited to Back Office (ERP) integrated environments. This option is no longer listed on the Integration - Back Office Extension Options tab.
	■ (Deprecated) OutboundRetryCountBOE: Removed to prevent the creation of duplicate records in Infor CRM SLX and the host ERP system.
	Back Office
	■ The Outbound Retry Count option has been removed from the Back Office Extension Options tab. This is a reference to the OutboundRetryCountBOE custom setting that was removed to prevent the creation of duplicate records in Infor CRM SLX and the host ERP system.
	■ There is improved documentation for price overrides and price adjustments for integrated quote or sales order unit pricing. See: ■ “Understanding Price Adjustments for Back Office integrated quotes and sales orders” ■ “Understanding Price Overrides for Back Office integrated quotes and sales orders” ■ “Configuring Back Office Extension Integration”.
Application Architect	
	Downloading Content
	■ You can now download content including customer journeys, CRM workflows, reports and the model to the local database from a single location.
	Bundle Actions
	■ Insert Computed Column **Note**: After applying a bundle that inserts a computed column, you must reset IIS. If you do not reset IIS, any group containing the computed column may fail to load properly. ■ Insert Customer Journey ■ Insert Email Template ■ Insert CRM Workflow
	Business Rules
	■ Added new Business Rule “IsLocked” to Quote and SalesOrder entities that checks the Status field for a value of “Pending Approval” (or translated value). ■ Quickforms for Quote and SalesOrder can now use this new rule along with the IsClosed rule to determine if the form should be locked down from any changes.

Enhancements since version 9.0

Application	Feature
9.3	
Web Client	
	General
	■ User theme mode and color settings are now stored in the database so that they are available for users on different browsers and after clearing the browser cache.
	■ Notes are no longer required to be associated with a record.
	CRM Workflows
	You can start a CRM Workflow manually for a selected contact, account, lead, opportunity, sales order, quote, or ticket from the list or detail view Task Pane option "Start CRM Workflow"..
	Customer Journey
	■ Now available for tickets, sales orders, and quotes. ■ Now may include a note step.
New form*	The Account detail view Customer Journey 360 tab displays a graphical representation of all customer journeys for the account and any customer journeys for contacts, opportunities, sales orders, or quotes associated with the account.
	Dashboard Customer Journey Kanban widgets for tickets, sales orders, and quotes. See "Working with a Dashboard Customer Journey Kanban widget" in the Web Client help.
New forms*	Multi-Factor Authentication provides an extra security layer by requiring users to provide a unique and time-sensitive code before being signed in to the Infor CRM Web Client. ■ Once implemented users must set up and use an authentication method before they can sign in to the Web Client. See “Signing in Using Multi-Factor Authentication” in the Web Client help. ■ Users can manage Multi-Factor Authentication methods from the Tools menu, Options, Multi-Factor Authentication tab. See “Managing Multi Factor Authentication method devices” in the Web Client help.
Web Client Administrator	
	General
New form*	System Summary Report displays information about your Infor CRM SLX system.
	CRM Workflow

	■ New triggers based on a date, a schedule or manual trigger.
	■ New trigger condition operators:
	    ■ On Change
	    ■ For date fields: Past due x Days, Past due x Hours, Within x Days, Within x Hours

	Customer Journey

	■ Supported for tickets, sales orders, and quotes.
	■ Supported for users:
	    ■ Create a customer journey with notes and check list (None) step actions.
	    ■ Customer Journey tab on the User detail view.
	■ New note action step.

	Database Manager

Application	Feature
New forms*	Database Manager allows the administrator to manage the database and perform related tasks in a single location. There are separate tabs for Tables, Views, Functions, Triggers, Global Joins and Audit. Each tab displays the records in a list view and detail pane tabs to manage the information for a specific item. The Task Pane includes tab-specific tasks for each tab.
	Execute Query
New form*	Execute Query allows the administrator to test or execute SQL statements.
	Plugin Manager
New forms*	Plugin Manager list view displays Web plugins and allows the administrator to delete plugins and manage plugin releases.
	SpeedSearch Manager
New forms*	SpeedSearch Manager allows the administrator and users with permission to manage SpeedSearch indexes and schedules and set SpeedSearch settings.
	Multi-Factor Authentication
New forms*	▪ Enable and configure Multi-Factor Authentication on the Office Profile Security tab. See "Implementing Multi Factor Authentication" in the Web Client help. ▪ Reset a user's authentication method on the User detail view Security tab.
	Office Profile
	On the Service/Support tab: ▪ Manage Urgency codes used to prioritize tickets. ▪ Manage the Customer Portal Web Access User.
	On the Email Setup tab: ▪ Configure email Send to CRM attachment options ▪ Manage domain exclusions
	On the Security tab: ▪ Enable and configure Multi-Factor Authentication
	User detail view
	On the Security tab: ▪ Reset a user's authentication method on the User detail view Security tab.
	New CRM Workflows tab to view and manage customer journeys for a user.

Application	Feature
	Secured Actions
	■ Administration/Plugin/ReleaseToEveryone - grants permission to replease plugins to "Everyone" in Query Builder. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/AddIndex - grants permission to add a SpeedSearch index. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/AddSchedule - grants permission to add a SpeedSearch schedule. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/DeleteIndex - grants permission to delete a SpeedSearch Index. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/DeleteSchedule - grants permission to delete a SpeedSearch Schedule. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/EditIndex - grants permission to edit a SpeedSearch index. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/EditSchedule - grants permission to edit a SpeedSearch schedule. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/ManageSettings - grants permission to manage SpeedSearch Settings. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/RunSchedule - grants permission to run a SpeedSearch Schedule. It is part of the Administrator role.
	■ Administration/SpeedSearchManager/View - grants permission to view SpeedSearch Manager. It is part of the Administrator role.
	■ Entities/JobManager/StartJobService - grants permission to start or stop the job service. It is part of the Administrator role.
Application Architect	
	Reports Management
	Download Reports to replace local reports with the reports from a specified Infor CRM SLX server. To download ■ In the Project Workspaces pane, right-click and select Download Reports.
	On the **Tools** menu, **Manage Reports** allows you to add, check out, and check in reports.
General	
	Password Security
	■ Passwords are now stored using a one-way hashing function, meaning they cannot be decrypted. ■ The conversion utility will convert existing passwords.

Application	Feature
9.2	
General enhancements	
	Connection Manager
	For Microsoft SQL only The SQL Native Client has been replaced with the Microsoft OLE DB Driver for SQL Server. You will need to update your connection information in the Connection Manager. See See "(Microsoft SQL Only) Updating Database Connection in Connection Manager" on page 20 for steps.
	Reporting
	Crystal Reports has been updated to version 13.0.33.4485.
	Conversion Utility
	All events are now written to the log file, including the start and end times of each action.
Windows Client	
	Sales Orders
	When a sales order is closed, the Closed field is set to True and the Closed Date field is populated with the date.
	Tickets
	When a ticket is closed, the Closed field is set to True.
Infor CRM SLX Mail Merge add-in for Microsoft Word	
	Time Zone field formatting.
	You can now type a new Family value and that template family will be visible if a template of that family is shared with another user. Also if the Family picklist is edited in the Web Client, the new Family will be available in the Word add-in.
	A new programmable item.
	When inserting a table in a mail merge template, all available table styles are listed in the document, not just a predefined subset, including custom table styles defined in the document.
	There is a new "Repeat header at the top of each page" option for tables.
	The Mail Merge Field Manager dialog box is wider and the field panel can be re-sized and remembers the slider position.
	Requested By is now available for Quotes.
Web Client	
	General
	The column splitter to re-size columns is now easier to select.
	Customer Journey
New forms*	Customer journeys are a series of stages and steps to guide a user and record, for example an opportunity or contact, through a particular process. The Customer Journey tab on the Contact, Account, Opportunity, and Lead detail views allows users to select and start a customer journey and track progress by performing and completing steps and stages. On the Dashboard, the Customer Journey Opportunity Kanban widget is used to view a list of the opportunities in each stage of a selected customer journey as well as roll-up totals of the sales potential, actual sales amount and weighted potential of the opportunities in each stage.

<table>
<tr><th>Application</th><th>Feature</th></tr>
<tr><td></td><td>SpeedSearch enhancements</td></tr>
<tr><td>Updated form*</td><td>The SpeedSearch text box in the menu bar and SpeedSearch view:
Includes a drop-down list to select the types of records to search against.
Most frequently used items appear at the top of the list
Supports type-ahead search against the selected record types
Supports in-context search. If you are on a list or detail view that can be searched against, that record type is automatically selected for you.
The SpeedSearch view user interface has been updated
Search options have been simplified
Search results are displays by record type in grids that can be sorted and columns can be added, removed, or resized.
Matches column lists the number of matches for each record. When hovered over, you can view a preview of the matching text.</td></tr>
<tr><td></td><td>Tickets</td></tr>
<tr><td></td><td>When a ticket is closed the Closed field is updated.</td></tr>
<tr><td colspan="2">Web Client Administrator</td></tr>
<tr><td></td><td>Customer Journeys</td></tr>
<tr><td>New form*</td><td>Ability to create and manage customer journeys and customer journey stags and steps.</td></tr>
<tr><td></td><td>Job Server improvements</td></tr>
<tr><td></td><td>Enhanced error handling
JobListener(s) notified of jobs to be executed
BOD load balancing</td></tr>
<tr><td></td><td>Sync History</td></tr>
<tr><td></td><td>Sync History is now available from the Administration menu, in addition to the Navigation bar under Integrations and Administration.</td></tr>
<tr><td></td><td>Developer Tools</td></tr>
<tr><td>Updated form*</td><td>Ability to install .sxb bundles from the Developer Tools menu, Install Bundles menu item.
Ability to view installed .sxb bundles from the Developer Tools menu, View Bundles menu item.</td></tr>
<tr><td></td><td>CRM Workflow</td></tr>
<tr><td></td><td>Ability to manually start a workflow using the SData API
Method: QueueWorkflow
ResourceKind - ionWorkflowDefinitions
Parameters - currentEntityType (string), entityId (string)
Result: IONWorkflowId (string)</td></tr>
<tr><td></td><td>Users</td></tr>
<tr><td>New form*</td><td>View Logged in Users
From the Users list view Task Pane, administrators can view logged in users and the number of concurrent users licenses being used.</td></tr>
<tr><td></td><td>Office Profile</td></tr>
</table>

Application	Feature
Updated form*	**Customer Service - Auto-assignment** The Auto Assignment option has been removed from the Service/Support tab and moved to a new Ticket Auto Assignment tab.
New form *	**Ticket Auto-assignment** A new Ticket Auto Assignment tab allows the administrator to assign users to a ticket area. When a ticket is created the ticket is automatically assigned to the user associated with that area of the ticket.
	Manage Licenses
New form* Updated form*	Ability to add or remove licenses from the Web Office Profile, Licenses tab.
	Activity Realignment
Updated form*	Ability to reassign activities with Common Tasks option in the Activities List view. **Note**: This is only available to the administrator.
	Secured Actions
	■ Administration/CustomerJourney/Add - grants permission to add a customer journey. It is part of the Administrator role.
	■ Administration/CustomerJourney/Delete - grants permission to delete a customer journey. It is part of the Administrator role.
	■ Administration/CustomerJourney/Edit - grants permission to edit a customer journey. It is part of the Administrator role.
	■ Administration/CustomerJourney/View - grants permission to view a customer journey. It is part of the Administrator role.
	■ Administration/CustomerJourneyInstance/Delete - grants permission to delete a customer journey instance. It is part of the Administrator role.
	■ Administration/License/Add – grants permission to add an Infor CRM license – Not part of any role.
	■ Administration/License/Delete – grants permission to delete an Infor CRM license. Not part of any role.
	■ Entities/User/LoggedInUsers – grants permission to view the currently logged in users.
Back Office	
	Price Service Support for Unpromoted Accounts
Updated form*	Ability to specify pricing for opportunities, quotes, and sales orders of unpromoted accounts. There is a new Default Customer ID field on the Add/Edit Back Office Accounting Entity dialog box to specify the ERP-based customer number for integrated pricing of opportunities, quotes, and sales orders of unpromoted accounts.
	Enhanced Bod processor logic
	Enhanced BOD processor logic limits the BOD content allotted to each worker job thread based on the active BOD payload sizes.
Customer Portal	
	Password Security
	■ Customer Portal passwords are now stored using a one-way hashing function, meaning they cannot be decrypted. ■ The conversion utility will convert existing passwords.

Application	Feature
	■ Customer Portal passwords must adhere to the password strength options defined in the Office Profile Security tab and will be validated when added or updated on the Contact detail view Web Access tab or the self-service reset password page.
	Password Self-Service
	Password self-service now uses the email information configured in the Office Profile Email Setup tab and no longer requires editing the appsettings.config file.

Application	Feature
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 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.

Application	Feature
	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 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.

Application	Feature
	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 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.
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

Application	Feature
	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 items or features deprecated in each version.

9.4

- The Outbound Retry Count option has been removed from the Back Office Extension Options tab. This is a reference to the OutboundRetryCountBOE custom setting that was removed to prevent the creation of duplicate records in Infor CRM SLX and the host ERP system.
- Mail Merge Output to Fax is no longer supported. The Write menu, Fax Using Template option was removed from the Infor CRM SLX Sales Client (Windows). The option is still visible in the Administrator, User Profile Function Security tab, but it will not display in the Windows client.
- Replaced the existing CodeDOM providers in web.config with the Microsoft.CodeDom.Providers.DotNetCompilerPlatform for faster ASP.NET compilation.

9.3

- BasicRunner.exe is no longer needed and has been removed. There are no longer any supported Basic scripts.
- GroupCopy.exe

9.2

There are no deprecated features in version 9.2

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 v9.4

2

Apply v9.4 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 9.4 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 v9.4 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 v9.4. For more information see "Create a Remote User or Remote Office Database" on page 28.

Installing the update

To begin the install

1. Extract the contents of the following .zip files to a temporary location on the computer to which you are applying v9.4:
   - ICRM SLX v9.4 Bundles.zip
   - Infor_CRM_SLX_v9.4_Update.zip
   - Third Party Installs.zip
2. Close all Infor CRM SLX applications on the computer to which you are applying v9.4.

3. Stop all Infor CRM SLX services on the computer to which you are applying v9.4 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
4. Navigate to the folder where you extracted the **Infor_CRM_SLX_v9.4_Update.zip** and double-click **InstallShell.exe**.
5. On the **Welcome** screen, click **Install** to install the patch.
6. If prompted that a reboot may be required, click **OK** to continue the install, or **Cancel** to cancel the install.
7. On the **Completed** screen, click **Finished**.

(Microsoft SQL Only) Updating Database Connection in Connection Manager

If you updated the Database Connection in Connection Manager in a previous release you may skip the steps in this section.

The SQL Native Client has been replaced with the Microsoft OLE DB Driver for SQL Server. You will need to update your connection information in the Connection Manager. The Connection Manager (OleDBConfigMgr.exe) is installed with:

- Admin Tools and Servers
- Offline Client
- Remote Client
- Remote Office
- Application Architect (download for Cloud implementations)

To edit a database connection

1. Open **Connection Manager**.
   On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Connection Manager**.
2. In the **Connection Manager** dialog box, select the database connection name, and then click **Edit**.
3. In the **Data Link Properties** dialog box, on the **Provider** tab, select **Microsoft OLE DB Driver for SQL Server**.

   If this option is not available, you must run the **msoledbsql.msi** to add this option before proceeding with these steps. The msoledbsql.msi is available in the **Third Party Installs.zip** for Infor CRM SLX version 9.2.

4. Click the **Connection** tab and complete the following:
   a. In the **Select or enter a server name** box, type the Database Server name.
   b. Click the **Enter information to log on to the server** drop-down arrow and select **SQL Server Authentication**.
   c. In the **User name** box, type the user name used to log on to the database server. (For example, sysdba).
   d. In the **Password** box, type the user password. (For example, Ma$t3rk3y). Passwords are case-sensitive.
   e. Verify the **Blank password** option is not selected.

f. Select the **Allow Saving Password** option. You must select this option or the connection will fail.

g. Select the **Select the database** option and click the drop-down arrow to select the database from the list.

h. Click **Test Connection** to verify the connection.

   If you cannot connect to the database, verify that the settings are correct (passwords are case-sensitive). Also verify that the database platform service is running on your Database Server.

5. Click **Test Connection** to verify that you can connect to the database.
   If the connection is not successful, confirm the information you provided in each box, and then click Test Connection again.
6. Click **OK**.
7. Click **OK**.
8. Click **OK**.
9. Click **OK**.

Installing bundles using the Administrator

Use the Administrator to install the Infor CRM SLX v9.4.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 **ICRM SLX v9.4 Bundles.zip** and double-click the bundle named **Infor CRM SLX v9.4.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.
7. Reboot all computers with any of the following Infor CRM SLX components installed:
   - Admin.exe
   - Architect.exe
   - Saleslogix.exe (including remote Saleslogix.exe)

Installing .zip bundles

Install .zip bundles using the Application Architect.

To install .zip bundles

1. Navigate to the folder where the **ICRM SLX v9.4 Bundles.zip** was extracted and ensure you have **Write** permissions to the folder.
2. Ensure the bundles are 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**.

   e. Repeat for all bundles.

3. Open the **Application Architect**.
4. On the **View** menu, click **Bundle Manager**.
5. Install the **ICRM SLX v9.4 Web VFS** bundle.
    a. Click **Install**.
    b. Select **File name** and navigate to the folder where the **ICRM SLX v9.4 Bundles.zip** was extracted, click **ICRM SLX v9.4 Web VFS.zip**, and then click **Open**.
    Note: Do not install the bundle from the bundle installation folder if you selected the **Extract and Install the Infor CRM SLX Update** option when "Installing the update".
    c. On the **Select Bundle** screen, click **Next**.
    d. Click **Finish**.
6. Rebuild the database schema.
    - On the **Tools** menu, click **Rebuild Database Schema**.
7. Install the **ICRM SLX v9.4 Web Actions** bundle.
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name** and navigate to the folder where the **ICRM SLX v9.4 Bundles.zip** was extracted, click **ICRM SLX v9.4 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**.
8. (Infor CRM SLX Mobile v4.3 implementations only) Install the **INFORCRM-14849 on Mobile 4.3.zip** bundle:
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name** and navigate to the folder where the **ICRM SLX v9.4 Bundles.zip** was extracted, click **INFORCRM-14849 on Mobile 4.3.zip**, and then click **Open**.
    d. On the **Select Bundle** screen, click **Next**.
    e. Click **Finish**.
9. (Optional) Install the **CRM Workflow Examples.zip** bundle:
    This bundle contains 6 CRM Workflow examples and the necessary support files, including an Account Status picklist item for Credit Hold.
    a. On the **View** menu, click **Bundle Manager**.
    b. Click **Install**.
    c. Select **File name** and navigate to the folder where the **ICRM SLX v9.4 Bundles.zip** was extracted, click **CRM Workflow Examples.zip**, and then click **Open**.
    d. On the **Select Bundle** screen, click **Next**.
    e. Click **Finish**.

Running the Conversion Utility

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

The conversion utility includes the following non-optional items:

- Updates CRM Workflows to accommodate changes to the Recipients tab.
- Sets the new IsActiveflag on CustomerJourneyInstanceStage records.
  For example, the conversion will set this flag to True if the stage is in progress (started but no complete date)
- Updates each ticket to include a roll up of each ticket's ticket activities ElapsedUnits.
  Updates TICKET.SUMTICKETACTIVITYELAPSEDUNITS
- Updates Ticket Closed flag based on the current Ticket Status value
  Updates TICKET.CLOSED
- Updates Opportunity, Quote and SalesOrder ExchangeRate column to 1 if the current value is null or empty.
  Updates OPPORTUNITY.EXCHANGERATE, QUOTE.EXCHANGERATE, SALESORDER.EXCHANGERATE
- Update Infor CRM SLX users' passwords to use new encryption method, SHA (Secured Hash Algorithm).
  Updates USERSECURITY.USERPW
- Update Customer Portal Web Access users passwords to use new encryption method, SHA (Secured Hash Algorithm).
  Updates CONTACT.WEBPASSWORD
- 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

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

- **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_9.4.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_9.4.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**.

Delete Deployed folders

To make sure all deployed files are updated you must delete the following deployed folders:

- Sdata
- SdataCustomer
- SlxClient
- SLXCustomerPortal

To delete the deployed folders

1. On the server where your Web files are deployed, browse to **inetpub\wwwroot**.
2. Delete the following folders:
   - Sdata
   - SdataCustomer
   - SlxClient
   - SLXCustomerPortal

Building and deploying the Web changes

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

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.

Replacing Crystal runtime engine

You do not have to perform these steps if you already did them in a previous version.

You must uninstall the current Crystal runtime engine and install the provided updated Crystal runtime engine in the Third Party Installs.zip. You must perform these steps on all Infor CRM SLX computers where .SAP Crystal Reports runtime engine for .NET Framework (32-bit) is installed. This includes all computers where the following components have been installed:

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

To replace Crystal Runtime

1. Uninstall **SAP Crystal Reports runtime engine for .NET Framework (32-bit)**.
2. Navigate to the folder where you extracted the **Third Party Installs.zip** and double-click **CR13SP33MSI32_0-80007712.MSI**.
3. Follow the SAP Crystal Reports runtime engine for .NET Framework (32-bit) install prompts to complete the installation.

Implementing Infor CRM Mail Merge for Microsoft Word add-in for Infor CRM SLX Sales Client (Windows)

Mail Merge and mail merge template management remain available on the Write menu, but now take place in Microsoft Word and require the Infor CRM Mail Merge for Microsoft Word add-in.

The Infor CRM Mail Merge for Microsoft Word add-in requires the SData portal. The administrator must deploy the SData portal in the Application Architect.

The administrator must provide the InforCRMWordAddinSetup.exe to each user in order to install the Infor CRM SLX Mail Merge add-in for Microsoft Word.

1. In Application Architect, deploy the SData portal.
2. Distribute the InforCRMWordAddinSetup.exe to users
   - Extract the **InforCRMWordAddinSetup.exe** from the ICRM SLX v9.4 Web VFS and make it accessible to users.
   - If you deployed the SlxClient portal in Application Architect
     - Browse to the SlxClient portal deployment on the web server: C:\inetpub\wwwroot\SlxClient\Libraries\WordAddin and
     - Make the **InforCRMWordAddinSetup.exe** accessible to users.
   - For users with access to the Infor CRM SLX Web Client, the **InforCRMWordAddinSetup.exe** is available from the **Tools** menu, **Options**, **General** tab, **Install Mail Merge for Microsoft Word** button.

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

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

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

To install the Microsoft Word add-in

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

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

    a. On the Microsoft Word **Mailings** tab, click the **Infor CRM SLX Options** button and, if necessary, click **Connection**.
    b. In the **SData URL** field, specify the server name and SData portal.

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

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

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

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

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

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

   If your implementation usesInfor OS, you will not enter your credentials in this dialog box. You will be prompted to enter your Infor OS credentials.

f. Click **Test**.

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

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

Converting Legacy Mail Merge Word Templates

Only the system administrator can perform these steps.

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

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

To convert a template

1. In Microsoft Word, on the **Mailings** tab, click **Manage Templates**.

2. If none of the templates have been converted, a message box displays “There are no mail merge templates available.” Click **OK** to close the dialog box.

3. In the **Manage Templates** toolbar, click **Convert**.
A message box displays with the number of legacy (DOC) mail merge templates.

4. In the message box, click **Yes**.

5. When the conversion is finished, click **OK** to close the **Convert Mail Merge Templates** dialog box.

Create a Remote User or Remote Office Database

In Infor CRM SLX v9.4, 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 RecordsExecute SQL	Triggers	Filters	Indexes
Events	Business Rules	>Execute SQL	Database Objects (.sxb)
Database Objects (VFS)	Plugins	Reports	Picklists
Windows Forms	Web Forms	Quick Forms	Smart Parts
Modules	Menus	Navigation	Context menus
Tasklets	Jobs	Configuration files	Services
Custom Settings	Roles	Secured Actions	Deprecated items

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
BODFieldMapping	Entity	Added new index BODFIELDMAPPING.BODFIELDMAPPING_ ENTITY	9.4
BODFieldMapping	IsActive	Added new index BODFIELDMAPPING.BODFIELDMAPPING_ ISACTIVE.	9.4
BODMapping	Entity	Added new index BODMAPPING.BODMAPPING_ ENTITYNAME	9.4
BODMapping	IsActive	Added new index BODMAPPING.BODMAPPING_ ISACTIVE	9.4
BODMapping	Priority	Added new index BODMAPPING.BODMAPPING_ PRIORITY.	9.4
BackOfficeAcctEntity	DefaultCustomerId	Column added to contain ERP external id used for pricing requests for prospects	9.2
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
Campaign	StartDate	Added new index CAMPAIGN.CAMPAIGN_ STARTDATE	9.4
Competitor	ACCOUNTID	Added new index COMPETITOR.COMPETITOR_ ACCOUNTID	9.4
Competitor	CONTACT	Added new index COMPETITOR.COMPETITOR_ CONTACT	9.4
ContactMFAMethod		New table to support future enhancement	9.3

Entity	Property	Description	Version
ContactMFAMethod	ContactMFAMethodID	Primary key for the table	9.3
ContactMFAMethod	CreateUser	User who created the record	9.3
ContactMFAMethod	CreateDate	The date the record was created	9.3
ContactMFAMethod	ModifyUser	User who modified the record	9.3
ContactMFAMethod	ModifyDate	The date the record was last modified	9.3
ContactMFAMethod	ContactID	Foreign key relationship to Contact table	9.3
ContactMFAMethod	Method	The authentication method. Currently: 0 - None; 1 - Authentication App; 2 - Email	9.3
ContactMFAMethod	Secret	The encrypted TOTP or HOTP secret.	9.3
ContactMFAMethod	LastLogin	The last time a user used the authentication method to login.	9.3
ContactMFAMethod	Description	The user's description for the MFA method (e.g. My Phone).	9.3
ContactMFAMethod	LastSuccessfulCode	The last successful TOTP or HOTP code that was processed successfully. When using TOTP the user can only use a TOTP code once.	9.3
ContactMFAMethod	IsDefault	The default MFA method. This method will be selected by default in the MfaAuth.aspx verification page.	9.3
ContactMFAMethod	Algorithm	The hash algorithm used by the MFA method: 0=SHA-1; 1=SHA-256; 2=SHA-512. TOTP uses SHA-1 (required by most authentication apps); HOTP (email) uses SHA-512.	9.3
ContactMFAMethod	Digits	The length of the number of digits the TOTP or HOTP process should generate. TOTP uses 6 (required by most authenticicition apps); HOTP uses 8. Valid values are 6, 8, or 10.	9.3
ContactMFAMethod	Counter	The number of times the HOTP code has been used. NULL for TOTP.	9.3
ContactMFAMethod	LastCounter	The last time the Counter was incremented in UTC.	9.3
Contract	Amount	Added new index CONTRACT.CONTRACT_AMOUNT	9.4

Entity	Property	Description	Version
Contract	EndingDate	Added new index CONTRACT.CONTRACT_ENDINGDATE	9.4
Contract	ReferenceNumber	Added new index CONTRACT.CONTRACT_REFERENCENUMBER	9.4
CustomerJourney		New table to contain customer journeys	9.2
CustomerJourney	CustomerJourneyId	Primary key for the table	9.2
CustomerJourney	CreateUser	User who created the record	9.2
CustomerJourney	CreateDate	The date the record was created	9.2
CustomerJourney	ModifyUser	User who modified the record	9.2
CustomerJourney	ModifyDate	The date the record was last modified	9.2
CustomerJourney	Name	The name given to the customer journey	9.2
CustomerJourney	Name	Added new index CUSTOMERJOURNEY_NAME.	9.4
CustomerJourney	Description	The description given to the customer journey	9.2
CustomerJourney	IsActive	Indicator if the customer journey is active or not	9.2
CustomerJourney	EntityType	Name of the entity the customer journey is based on	9.2
CustomerJourney	EntityType	Added new index CUSTOMERJOURNEY_ENTITYTYPE.	9.4
CustomerJourneyInstance		Contains a snapshot of the customer journey at the time the journey is associated with an entity	9.2
CustomerJourneyInstance	CustomerJourneyInstanceId	Primary key for the table	9.2
CustomerJourneyInstance	CustomerJourneyId	Foreign key to CustomerJourney	9.2
CustomerJourneyInstance	CreateUser	User who created the record	9.2
CustomerJourneyInstance	CreateDate	The date the record was created	9.2
CustomerJourneyInstance	ModifyUser	User who modified the record	9.2
CustomerJourneyInstance	ModifyDate	The date the record was last modified	9.2
CustomerJourneyInstance	Name	The name given to the customer journey	9.2
CustomerJourneyInstance	EntityId	The primary key id of the associated entity	9.2
CustomerJourneyInstance	IsReadOnly	Indicates this instance is read only (used when converting from lead to contact)	9.2

Entity	Property	Description	Version
CustomerJourneyInstanceStage		New table to contain a snapshot of the customer journey's associated stages at the time the journey is created for the associated entity	9.2
CustomerJourneyInstanceStage	CustomerJourneyInstanceStageId	Primary key for the table	9.2
CustomerJourneyInstanceStage	CustomerJourneyInstanceId	Foreign key to CustomerJourneyStage.	9.2
CustomerJourneyInstanceStage	CreateUser	User who created the record	9.2
CustomerJourneyInstanceStage	CreateDate	The date the record was created	9.2
CustomerJourneyInstanceStage	ModifyUser	User who modified the record	9.2
CustomerJourneyInstanceStage	ModifyDate	The date the record was last modified	9.2
CustomerJourneyInstanceStage	Name	Name of the stage at the time the customer journey story was create for the entity	9.2
CustomerJourneyInstanceStage	Completed	Flag indicating if the stage is complete	9.2
CustomerJourneyInstanceStage	CompletedDate	Date the stage was completed	9.2
CustomerJourneyInstanceStage	StartDate	Date the stage was started	9.2
CustomerJourneyInstanceStage	Sequence	Order for which the stages are displayed for the customer journey	9.2
CustomerJourneyInstanceStage	Probability	Probability of completing the customer journey once the current stage is complete	9.2
CustomerJourneyInstanceStage	ExpectedDaysInStage	Number of days stage is expected to be open prior to close	9.2
CustomerJourneyInstanceStage	Description	The description given to the customer journey stage	9.2
CustomerJourneyInstanceStep		Contains a snapshot of the customer journey's associated steps at the time the journey is created for the associated entity.	9.2
CustomerJourneyInstanceStep	CustomerJourneyInstanceStepId	Primary key for the table	9.2
CustomerJourneyInstanceStep	CustomerJourneyInstanceStageId	Foreign key to CustomerJourneyInstanceStage	9.2
CustomerJourneyInstanceStep	CreateUser	User who created the record	9.2
CustomerJourneyInstanceStep	CreateDate	The date the record was created	9.2
CustomerJourneyInstanceStep	ModifyUser	User who modified the record	9.2
CustomerJourneyInstanceStep	ModifyDate	The date the record was last modified	9.2

Entity	Property	Description	Version
CustomerJourneyInstanceStep	Name	Name of the step at the time the customer journey story was create for the entity	9.2
CustomerJourneyInstanceStep	Completed	Flag indicating if the step is complete	9.2
CustomerJourneyInstanceStep	CompletedDate	Date the step was completed	9.2
CustomerJourneyInstanceStep	StartDate	Date the step was started	9.2
CustomerJourneyInstanceStep	Description	The description given to the customer journey	9.2
CustomerJourneyInstanceStep	Action	The action being performed on the step	9.2
CustomerJourneyInstanceStep	Required	Indicates if this is a required step prior to completion of the stage	9.2
CustomerJourneyInstanceStep	Sequence	Order for which the stages are displayed for the customer journey	9.2
CustomerJourneyInstanceStep	ActionData	Default configuration options for the step in json format	9.2
CustomerJourneyInstanceStep	ActionEntityType	Represents the entity type of the step action	9.2
CustomerJourneyInstanceStep	ActionEntityId	The primary key value of the record created for the step action	9.2
CustomerJourneyStage		New table to contain customer journey stages	9.2
CustomerJourneyStage	CustomerJourneyStageId	Primary key for the table	9.2
CustomerJourneyStage	CustomerJourneyId	Foreign key to Customer Journey.	9.2
CustomerJourneyStage	CreateUser	User who created the record	9.2
CustomerJourneyStage	CreateDate	The date the record was created	9.2
CustomerJourneyStage	ModifyUser	User who modified the record	9.2
CustomerJourneyStage	ModifyDate	The date the record was last modified	9.2
CustomerJourneyStage	Name	The name given to the customer journey stage	9.2
CustomerJourneyStage	Description	The description given to the customer journey stage	9.2
CustomerJourneyStage	Sequence	Order for which the stages are displayed for the customer journey	9.2
CustomerJourneyStage	Probability	Probability of completing the customer journey once the current stage is complete	9.2

Entity	Property	Description	Version
CustomerJourneyStage	ExpectedDaysInStage	Number of days stage is expected to be open prior to close	9.2
CustomerJourneyStep		New table to contain customer journey steps	9.2
CustomerJourneyStep	CustomerJourneyStepId	Primary key for the table	9.2
CustomerJourneyStep	CustomerJourneyStageId	Foreign key to Customer Journey Stage	9.2
CustomerJourneyStep	CreateUser	User who created the record	9.2
CustomerJourneyStep	CreateDate	The date the record was created	9.2
CustomerJourneyStep	ModifyUser	User who modified the record	9.2
CustomerJourneyStep	ModifyDate	The date the record was last modified	9.2
CustomerJourneyStep	Name	The name given to the step	9.2
CustomerJourneyStep	Description	The description given to the step	9.2
CustomerJourneyStep	Action	The action being performed on the step	9.2
CustomerJourneyStep	Sequence	Order for which the steps are displayed for the customer journey	9.2
CustomerJourneyStep	Required	Indicates if this is a required step prior to completion of the stage	9.2
CustomerJourneyStep	ActionData	Default configuration options for the step in json format	9.2
CustomerQueryParameter	IsHidden	Column converted from type Bit to nchar(1)	9.2
DatabaseAudit		New table to store database changes audit information	9.3
DatabaseAudit	DatabaseAuditID	Primary key for the table	9.3
DatabaseAudit	CreateUser	User who created the record	9.3
DatabaseAudit	CreateDate	The date and time the record was created	9.3
DatabaseAudit	ModifyUser	User who modified the record	9.3
DatabaseAudit	ModifyDate	The date and time the record was last modified	9.3
DatabaseAudit	Payload	The json representing the data of the action that occurred	9.3
DatabaseAudit	PreviousValue	The value of the action that occurred prior to the change	9.3
DatabaseAudit	NewValue	The value of the action after the changed occurred	9.3

Entity	Property	Description	Version
DatabaseAudit	IpAddress	The user's IP address that initiated the change action	9.3
DatabaseAudit	ExecutedDate	The date the change occurred	9.3
DatabaseAudit	RecoveryData	Contains the data required in order for the action to be restored	9.3
DatabaseAudit	CanRecover	Boolean indicating if the action that took place is available to be restored or not	9.3
DatabaseAudit	ObjectName	The name of primary identifier of the action i.e. The name of the table or field being created or modified	9.3
DatabaseAudit	Type	Represents the action type for example, Create Table/Field	9.3
EmailTemplatePropertyView		New table combines the EmailTemplate and EmailTemplateProperty tables	9.1
IndexFrequentlyUsed		New table tracks the use of SpeedSearch indexes to determine the Most Frequently Used per user.	9.2
IndexFrequentlyUsed	IndexFrequentlyUsedID	Primary key for the table	9.2
IndexFrequentlyUsed	CreateUser	User who created the record	9.2
IndexFrequentlyUsed	CreateDate	The date the record was created	9.2
IndexFrequentlyUsed	ModifyUser	User who modified the record	9.2
IndexFrequentlyUsed	ModifyDate	The date the record was last modified	9.2
IndexFrequentlyUsed	UserID	Identifies the user whose use of a SpeedSearch index is being tracked.	9.2
IndexFrequentlyUsed	IndexName	Foreign key to the IndexDefinition	9.2
IndexFrequentlyUsed	SearchCount	Tracks the number of times a user searches against the SpeedSearch index.	9.2
IONWorkflow	EntityName	Character limit increased from 64 to 512 characters	9.1
IONWorkflowDefinition	IsActive	Column converted from type Bit to nchar(1)	9.2
IONWorkflowDefinition	IsAutomatic	Column converted from type Bit to nchar(1)	9.2
IONWorkflowDefinition	LockForm	Column converted from type Bit to nchar(1)	9.1
IONWorkflowMapping	IsActive	Column converted from type Bit to nchar(1)	9.2

Entity	Property	Description	Version
Lead_Address	GeoCodeLongitude	Added for the calculating the longitude on the address location	9.4
Lead_Address	GeocodeLatitude	Added for the calculating the latitude on the address location	9.4
Lead_Address	GeocodeProvider	Added for the calculating the address location	9.4
Lead_Address	GeocodeFailed	Added for the calculating the address location	9.4
LeadCapture		New table to capture raw form data from external sites	9.4
LeadCapture	LeadCaptureID	Primary key for the entity.	9.4
LeadCapture	CreateUser	User who created the record	9.4
LeadCapture	CreateDate	The date the record was created	9.4
LeadCapture	ModifyUser	User who modified the record	9.4
LeadCapture	ModifyDate	The date the record was last modified	9.4
LeadCapture	UserHostAddress	The user’s IP address that submitted the form.	9.4
LeadCapture	MappingID	The foreign key to the LeadCaptureMapping table.	9.4
LeadCapture	FormData	JSON string consisting of the captured form’s key/value pairs.	9.4
LeadCapture	URLReferrer	The website that submitted the form	9.4
LeadCapture	ApiKey	The generated API key used in the form.	9.4
LeadCaptureConfiguration		New table to contain configurations for the lead capture http handler.	9.4
LeadCaptureConfiguration	LeadCaptureConfigurationID	Primary key for the entity.	9.4
LeadCaptureConfiguration	CreateUser	User who created the record	9.4
LeadCaptureConfiguration	CreateDate	The date the record was created	9.4
LeadCaptureConfiguration	ModifyUser	User who modified the record	9.4
LeadCaptureConfiguration	ModifyDate	The date the record was last modified	9.4
LeadCaptureConfiguration	ApiKey	ApiKey is used as a query parameter to our http form handler. If the ApiKey passed in does not match the configuration, the request will be denied.	9.4

Entity	Property	Description	Version
LeadCaptureMapping		New tablethat contains a collection of mapping items that will map between the form data and CRM properties.	9.4
LeadCaptureMapping	LeadCaptureMappingID	Primary key for the entity.	9.4
LeadCaptureMapping	CreateUser	User who created the record	9.4
LeadCaptureMapping	CreateDate	The date the record was created	9.4
LeadCaptureMapping	ModifyUser	User who modified the record	9.4
LeadCaptureMapping	ModifyDate	The date the record was last modified	9.4
LeadCaptureMapping	Name	The name of the mapping.	9.4
LeadCaptureMapping	EntityType	The entity type used for this mapping. Defaults to “Lead” and is read only for the initial release.	9.4
LeadCaptureMappingDetail		A new table that contains the mapping configuration that specifies the form property and the CRM property. When the LeadCapture table is processed, this mapping is used to populate the Lead entity. These are a collection of LeadCaptureMappings.	9.4
LeadCaptureMappingDetail	LeadCaptureMappingDetailID	Primary key for the entity.	9.4
LeadCaptureMappingDetail	LeadCaptureMappingID	Foreign key to the LeadCaptureMapping entity..	9.4
LeadCaptureMappingDetail	CreateUser	User who created the record	9.4
LeadCaptureMappingDetail	CreateDate	The date the record was created	9.4
LeadCaptureMappingDetail	ModifyUser	User who modified the record	9.4
LeadCaptureMappingDetail	CRMProperty	The CRM entity property name. If the property is a related address, it will use dot notation, for example: “Address.Address1	9.4
LeadCaptureMappingDetail	FormProperty	The HTML form element name	9.4
OpportunityProduct	LineType	Added to track zero priced products	9.1
Plugin	IsCheckedOut	Flag indicating if a plugin of type Report has been checked out	9.3
Product	IsBundle	Indicates if the product contains product parts	9.1

Entity	Property	Description	Version
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
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	IsInforSTCloud	Used to identify if a implementation is Infor CRM SLX ST Cloud.	9.1
SYSTEMINFO	AllowWebDeploy	Used to identify if an Infor CRM SLX ST Cloud implementation allows remote deployment	9.1
SYSTEMINFO	UseMultiFactorAuth	Flag enabling/disabling whether CRM uses factor authentication	9.3
SYSTEMINFO	MultiFactorAuthMethod	The multi-factor authentication method to be used. Valid values are: 0 (Null) - None; 1 - TOTP; 2 - Email.	9.3
SYSTEMINFO	MFAEmailTimeOut	The validity window for an OTP to be accepted by our validation system.	9.3
SYSTEMINFO	UseCurrencySystemSetting	Used to determine if an override should be applied to the currency control to specify the number of decimal digits displayed	9.4
SYSTEMINFO	CurrencyDecimalPlaces	The number of decimal digits to display for the currency control	9.4
Ticket	ContactId	Exposed property	9.1

Entity	Property	Description	Version
UserMFAMethod		New table to support user configured multi authentication methods	9.3
UserMFAMethod	UserMFAMethodID	Primary key for the table	9.3
UserMFAMethod	UserID	Foreign key relationship to User table	9.3
UserMFAMethod	CreateUser	User who created the record	9.3
UserMFAMethod	CreateDate	The date the record was created	9.3
UserMFAMethod	ModifyUser	User who modified the record	9.3
UserMFAMethod	ModifyDate	The date the record was last modified	9.3
UserMFAMethod	Method	The authentication method. Currently: 0 - None; 1 - Authentication App; 2 - Email	9.3
UserMFAMethod	Secret	The encrypted TOTP or HOTP secret.	9.3
UserMFAMethod	LastLogin	The last time a user used the authentication method to login.	9.3
UserMFAMethod	Description	The user's description for the MFA method (e.g. My Phone).	9.3
UserMFAMethod	LastSuccessfulCode	The last successful TOTP or HOTP code that was processed successfully. When using TOTP the user can only use a TOTP code once.	9.3
UserMFAMethod	IsDefault	The default MFA method. This method will be selected by default in the MfaAuth.aspx verification page.	9.3
UserMFAMethod	Algorithm	The hash algorithm used by the MFA method: 0=SHA-1; 1=SHA-256; 2=SHA-512. TOTP uses SHA-1 (required by most authentication apps); HOTP (email) uses SHA-512.	9.3
UserMFAMethod	Digits	The length of the number of digits the TOTP or HOTP process should generate. TOTP uses 6 (required by most authenticition apps); HOTP uses 8. Valid values are 6, 8, or 10.	9.3
UserMFAMethod	Counter	The number of times the HOTP code has been used. NULL for TOTP.	9.3
UserMFAMethod	LastCounter	The last time the Counter was incremented in UTC.	9.3

Entity	Property	Description	Version
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
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

Entity	Property	Description	Version
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
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	Description	Version
Account.AccountManager	M:1	User		9.4
Account.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Account.ErpBuyerContact	M:1	Contact	Updated Expose to Workflow to True	9.4
Account.RegionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Back Office.AccountAccountingEntities	1:M	Account Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office.Accounts	1:M	Account.BackOffice	Updated default cascade option to None	9.3
Back Office.BODFieldMappings	1:M	BOD Field Mapping.BackOffice	Updated default cascade option to None	9.3
Back Office.BOEPAMappings	1:M	PriceMapping.BackOffice	Updated default cascade option to None	9.3
Back Office.Contacts	1:M	Contact.BackOffce	Updated default cascade option to None	9.3
Back Office.ERPBillToAccountingEntities	1:M	Bill To Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPBillToes	1:M	Bill To.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPInvoices	1:M	Invoice.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPPayFromAccountingEntities	1:M	Pay From Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office ERPPayFroms	1:M	Pay From.BackOffice	Updated default cascade option to None	9.3

Parent	Relationship	Child	Description	Version
BackOffice.ERPPersonAccountingEntities	1:M	Person Accounting Entity.BackOffice	Updated default cascade option to None	9.3
BackOffice.ERPPersons	1:M	Person.BackOffice	Updated default cascade option to None	9.3
BackOffice.ERPReceivables	1:M	Person.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPShipments	1:M	Shipment.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPShipToAccountingEntities	1:M	Ship To Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office.ERPShipToes	1:M	Ship To BackOffice	Updated default cascade option to None	9.3
Back Office.ProductAccountingEntities	1:M	Product Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office.Products	1:M	Product.BackOffice	Updated default cascade option to None	9.3
Back Office.Quotes	1:M	Quote.BackOffice	Updated default cascade option to None	9.3
Back Office.Returns	1:M	Return.BackOffice	Updated default cascade option to None	9.3
Back Office.SalesOrders	1:M	Sales Order.BackOffice	Updated default cascade option to None	9.3
Back Office.SlxLocationAccountingEntities	1:M	Location Accounting Entity.BackOffice	Updated default cascade option to None	9.3
Back Office.SlxLocations	1:M	Location.BackOffice	Updated default cascade option to None	9.3
Bill To.SalesOrders	1:M	Sales Order.ErpBillTo	Updated Expose to Workflow to True	9.4
Contact.ContactMFAMethods	1:M	Contact MFA Method. Contact	Added in support of Multi-Factor Authentication	9.3
Contact.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4

Parent	Relationship	Child	Description	Version
Customer Journey Instance Stage.CustomerJourneyInstanceSteps	1:M	Customer Journey Instance Step.CustomerJourneyInstanceStage	Added in support of Customer Journey	9.2
Customer Journey Instance.CustomerJourneyInstanceStages	1:M	Customer Journey Instance Stage.CustomerJourneyInstance	Added in support of Customer Journey	9.2
Customer Journey Stage.CustomerJourneySteps	1:M	Customer Journey Step.CustomerJourneyStage	Added in support of Customer Journey	9.2
Customer Journey.CustomerJourneyInstances	1:M	Customer Journey Instance.CustomerJourney	Added in support of Customer Journey	9.2
Customer Journey.CustomerJourneyStages	1:M	Customer Journey Stage.CustomerJourney	Added in support of Customer Journey	9.2
Lead Capture Mapping.LeadCaptureMappingDetails	1:M	Lead Capture Mapping Detail.LeadCaptureMapping	Added in support of Lead Capture.	9.4
Opportunity.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Opportunity.RegionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Pay From.SalesOrders	1:M	Sales Order.ErpPayFrom	Updated Expose to Workflow to True	9.4
Product.ProductPart	M:1	Product Part.Product	Added in support of Product bundle changes	9.1
Product.ProductParts	1:M	Product Part.ParentProduct	Added in support of Product bundle changes	9.1
Return.AssignedTo	M:1	Owner	Updated Expose to Workflow to True	9.4
Return.ClosedBy	M:1	Owner	Updated Expose to Workflow to True	9.4
Sales Order.SODistributedTaxes	1:M	Discount Charge Item.SODistributedTax	Modified to include cascade deletes	9.2
User.UserMFAMethods	1:M	User MFA Method.User	Added in support of Multi-Factor Authentication	9.3

Parent	Relationship	Child	Description	Version
Workflow Step.WorkflowStepInstances	1:M	Workflow Step Instance.WorkflowStep	Added in support of Workflow step changes	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

The following lists entities with inserted records since in v9.0.

Entity	Description	Version
CUSTOMSETTINGS	Updated records for Sync for Exchange integration. (INFORCRM-32907)	9.4
INDEXDEFINITION	Updated index definition records for Ticket, and Customer Ticket with more searchable fields. (INFORCRM-32264) New index definition record that searches the History table, but only where Type = Note (262148). (INFORCRM-30135)	9.4
	Updated index schedule records for changes to Ticket, Customer Ticket (INFORCRM-32264), and Notes (INFORCRM-30135).	9.4

Entity	Description	Version
INTEGRATION	Updated record for Sync for Exchange change. (INFORCRM-32907)	9.4
INTEGRATIONRESOURCE	Updated record for Sync for Exchange change. (INFORCRM-32907)	9.4
LEADCAPTURECONFIGURATION	Added record to support Lead Capture	9.4
LEADSOURCE	Added record to support Lead Capture	9.4
OAUTHPROVIDER	Updated record for Sync for Exchange change. (INFORCRM-32907)	9.4
USEROPTIONDEF	Customer Journey record added to create default group All Customer Journeys.	9.2
VIRTUALFILESYSTEM	Update to the CurrencyConfiguration.xml file for Back Office Extension.	9.2

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
Saleslogix Application Entities	CustomerJourney	EntityType	9.2
Saleslogix Application Entities	CustomerJourney	Name	9.2
Saleslogix Application Entities	ERPInvoice	ErpStatus	9.3
Saleslogix Application Entities	ERPInvoice	InvoiceDate	9.3
Saleslogix Application Entities	ERPInvoice	TotalAmount	9.3
Saleslogix Application Entities	SalesOrder	GrandTotal	9.3
Saleslogix Application Entities	SalesOrder	SumGrandTotal	9.3
Saleslogix Application Entities	WorkflowInstance	CompletedDate	9.3
Saleslogix Application Entities	WorkflowInstance	Entity	9.3
Saleslogix Application Entities	WorkflowInstance	StartDate	9.3

Create Indexes

The following lists indexes added since in v9.0.

Index Name	Version
ADMINROLES.ADMINROLES_SECCODEID	9.2
APPLICATIONBUILDERREQUEST.APPLICATIONBUILDREQUEST_STATUS	9.1
APPLICATIONBUILDERREQUEST.APPLICATIONBUILDREQUEST_TYPE	9.1
BACKOFFICE.BACKOFFICE_SECCODEID	9.2
BODFIELDMAPPING.BODFIELDMAPPING_SECCODEID	9.2
BODFIELDMAPPING.BODFIELDMAPPING_ENTITY	9.4
BODFIELDMAPPING.BODFIELDMAPPING_ISACTIVE	9.4
BODMAPPING.BODMAPPING_SECCODEID	9.2
BODMAPPING.BODMAPPING_ENTITYNAME	9.4
BODMAPPING.BODMAPPING_ISACTIVE	9.4
BODMAPPING.BODMAPPING_PRIORITY	9.4
BOEPAMAPPING.BOEPAMAPPING_SECCODEID	9.2
BOEPASERVICE.BOEPASERVICE.SECCODEID	9.2
CALCULATEDFIELDDATA.CALCULATEDFIEDDATA_SECCODEID	9.2
CAMPAIGN.CAMPAIGN_STARTDATE	9.4
COMPETITOR.COMPETITOR_ACCOUNTID	9.4
COMPETITOR.COMPETITOR_CONTACT	9.4
CONTRACT.CONTRACT_AMOUNT	9.4
CONTRACT.CONTRACT_ENDINGDATE	9.4
CONTRACT.CONTRACT_REFERENCENUMBER	9.4
CONTRACT.CONTRACT_SECCODEID	9.2
CUSTOMERJOURNEY.CUSTOMERJOURNEY_ENTITYTYPE	9.4
CUSTOMERJOURNEY.CUSTOMERJOURNEY_NAME	9.4

Index Name	Version
DISCOUNTCHARGEITEM.DISCOUNTCHARGEITEM_SECCODEID	9.2
EMAILTEMPLATE.EMAILTEMPLATE_SECCODEID	9.2
EMAILTEMPLATEPROPERTY.EMAILTEMPLATEPROPERTY_SECCODEID	9.2
ERPBILLTO.ERPBILLTO_SECCODEID	9.2
ERPINVOICE.ERPINVOICE_ERPSTATUS	9.4
ERPPAYFROM.ERPPAYFROM_SECCODEID	9.2
ERPRECEIVABLE.ERPRECEIVABLE_ERPSTATUS	9.4
ERPSHIPMENT.ERPSHIPMENT_ERPSTATUS	9.4
ERPSHIPTO.ERPSHIPTO_SECCODEID	9.2
IMPORTHISTORY.IMPORTHISTORY_SECCODEID	9.2
IMPORTTEMPLATE.IMPORTEMPLATE_SECCODEID	9.2
INTEGRATION.INTEGRATION_ENABLED	9.4
INTEGRATION.INTEGRATION_NAME	9.4
LEAD.LEAD_CREATEDATE	9.4
OPPORTUNITY.OPPORTUNITY_ACTUALAMOUNT	9.4
OPPORTUNITY.OPPORTUNITY_CLOSEPROBABILITY.	9.4
OPPORTUNITY.OPPORTUNITY_DATEOPENED	9.4
QUOTE.QUOTE_ACCOUNTMANAGERID	9.4
QUOTE.QUOTE_CREATEDATE	9.4
QUOTE.QUOTE_GRANDTOTAL	9.4
QUOTE.QUOTE_SECCODEID	9.2
QUOTE.QUOTE_STATUS	9.4
REPORTFILTER.REPORTFILTER.SECCODEID	9.2
REPORTHISTORY.REPORTHISTORY_SECCODEID	9.2
RMA.RMA_SECCODEID	9.2
SALESORDER.SALESORDER_CREATEDATE	9.4

Index Name	Version
SALESORDER.SALESORDER_GRANDTOTAL.	9.4
SALESORDER.SALESORDER_SECCODEID	9.2
SALESORDER.SALESORDER_STATUS	9.4
SYNCRESULT.SYNCRESULT_SECCODEID	9.2
TICKET.TICKET_ASSIGNEDTOID	9.4
TICKET.TICKET_CREATEDATE	9.4
TICKET.TICKET_MODIFYDATE	9.4
WORKFLOWINSTANCE.WORKFLOWINSTANCE_SECCODEID	9.2
VFSDATA.VFSDATA_ITEMEXTENSION	9.2
VFSDATA.VFSDATA_ITEMNAME	9.2
VFSDATA.VFSDATA_ITEMPATH	9.2
VFSDATA.VFSDATA_PARENTITEMID	9.2
VFSDATA.VFSDATA_VFSID	9.2

Events

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

Package	Entity	Event	Description	Version
Saleslogix Activity Support	ActivityAssociation	OnAfterDelete		9.4
Saleslogix Activity Support	History	OnAfterInsert		9.4
Saleslogix Activity Support	HistoryAssociation	OnAfterDelete		9.4
Saleslogix Application Entities	Account	OnAfterDelete		9.4
Saleslogix Application Entities	CustomerJourney	OnBeforeInsert	New event	9.2
Saleslogix Application Entities	CustomerJourneyInstanceStage	OnBeforeUpdate	New event	9.2
Saleslogix Application Entities	CustomerJourneyStage	OnAfterDelete	New event	9.2
Saleslogix Application Entities	CustomerJourneyStage	OnBeforeInsert		9.4

Package	Entity	Event	Description	Version
Saleslogix Application Entities	CustomerJourneyStep	OnAfterDelete	New event	9.2
Saleslogix Application Entities	DiscountChargeItem	OnBeforeDelete		9.3
Saleslogix Application Entities	ProductPart	OnBeforeInsert	New event	9.1
Saleslogix Application Entities	ProductPart	OnCreate	New event	9.1
Saleslogix Contract Sync Entities	AppIdMapping	OnAfterInsert		9.4
Saleslogix Security Support	ContactMFAMethod	OnBeforeInsert	New event	9.3
Saleslogix Security Support	ContactMFAMethod	OnBeforeUpdate	New event	9.3
Saleslogix Security Support	UserMFAMethod	OnBeforeInsert	New event	9.3
Saleslogix Security Support	UserMFAMethod	OnBeforeUpdate	New event	9.3

Business Rules

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

Package	Entity	Business Rule	Version
Saleslogix Activity Support	History	SetEntityDetailsToSession	9.1
Saleslogix Application Entities	Account	GetAccountCustomerJourney360	9.3
Saleslogix Application Entities	Account	OnAccountManagerChange	9.3
Saleslogix Application Entities	Account	OnDivisionalManagerChange	9.3
Saleslogix Application Entities	Account	OnRegionalManagerChange	9.3
Saleslogix Application Entities	Account	UpdateContactsMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateFaxChanges	9.3
Saleslogix Application Entities	Account	UpdateMainPhoneChanges	9.3
Saleslogix Application Entities	Account	UpdateOpportunitiesMatcinggAccountManager	9.3
Saleslogix Application Entities	Account	UpdateQuotesMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateSalesOrdersMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateWebAddressChanges	9.3

Package	Entity	Business Rule	Version
Saleslogix Activity Support	Activity	IsSyncOnlyNewCRMCalendarItems	9.1
Saleslogix Application Entities	Address	GetFullAddress	9.1
Saleslogix Application Entities	Contact	GetContactMFADevices	9.3
Saleslogix Application Entities	Contact	MoveContact	9.2
Saleslogix Application Entities	Contact	ResetContactMFADevices	9.3
Saleslogix Application Entities	Contact	SaveContact	9.4
Saleslogix Application Entities	CustomerJourney	CopyCustomerJourney	9.2
Saleslogix Application Entities	CustomerJourney	CreateCustomerJourneyInstance	9.2
Saleslogix Application Entities	CustomerJourney	GetOpportunityKanbanAggregateData	9.2
Saleslogix Application Entities	CustomerJourney	GetOpportunityKanbanData	9.2
Saleslogix Application Entities	CustomerJourney	GetQuoteKanbanAggregateData	9.3
Saleslogix Application Entities	CustomerJourney	GetQuoteKanbanData	9.3
Saleslogix Application Entities	CustomerJourney	GetSalesOrderKanbanAggregateData	9.3
Saleslogix Application Entities	CustomerJourney	GetSalesOrderKanbanData	9.3
Saleslogix Application Entities	CustomerJourney	GetTicketKanbanData	9.3
Saleslogix Application Entities	CustomerJourney	GetTicketKanbanData	9.3
Saleslogix Application Entities	CustomerJourney	LoadJourneyStageAndSteps	9.2
Saleslogix Application Entities	CustomerJourneyInstance	DeleteCustomerJourneyInstance	9.2
Saleslogix Application Entities	CustomerJourneyInstance	LoadJourneyInstanceStageAndSteps	9.2
Saleslogix Application Entities	CustomerJourneyInstanceStage	CompleteStageInstance	9.2
Saleslogix Application Entities	CustomerJourneyInstanceStep	CanStartCustomerJourneyInstanceStep	9.2
Saleslogix Application Entities	CustomerJourneyInstanceStep	CompleteStepInstance	9.2
Saleslogix Application Entities	CustomerJourneyInstanceStep	StartCustomerJourneyInstanceStep	9.2
Saleslogix Application Entities	CustomerJourneyStage	CopyStage	9.2
Saleslogix Application Entities	CustomerJourneyStage	MoveStageDown	9.2
Saleslogix Application Entities	CustomerJourneyStage	MoveStageUp	9.2

Package	Entity	Business Rule	Version
Saleslogix Application Entities	CustomerJourneyStep	CopyStepToStage	9.2
Saleslogix Application Entities	CustomerJourneyStep	MoveStepDown	9.2
Saleslogix Application Entities	CustomerJourneyStep	MoveStepUp	9.2
Saleslogix Application Entities	EmailTemplate	GetApprovalTokens	9.1
Saleslogix Application Entities	EmailTemplate	GetMailMergeTemplates	9.4
Saleslogix Application Entities	EmailTemplate	GetSubjectTokens	9.1
Saleslogix Application Entities	EmailTemplate	GetTemplateTokens	9.1
Saleslogix Application Entities	Integration	TestOCMLink	9.4
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	QueueWorkflow	9.2
Saleslogix Application Entities	IONWorkflowDefinition	RefreshWorkflowProperties	9.1
Saleslogix Application Entities	IONWorkflowDefinition	SaveWorkflowDesign	9.1
Saleslogix Application Entities	Lead	ManualMergeLeadWithLead	9.2
Saleslogix Application Entities	Opportunity	RefreshPricing	9.2
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	Quote	RefreshPricing	9.2

Package	Entity	Business Rule	Version
Saleslogix Application Entities	QuoteItem	CalculatePriceChanges	9.3
Saleslogix Application Entities	QuoteItem	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	QuoteItem	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	QuoteItem	SetDocTotalDiscountOnChange	9.2
Saleslogix Application Entities	QuoteItem	SetDocUnitErpAdjustmentOnChange	9.3
Saleslogix Application Entities	QuoteItem	SetDocUnitErpAdjustmentPercentOnChange	9.2
Saleslogix Application Entities	SalesOrder	RefreshPricing	9.2
Saleslogix Application Entities	SalesOrderItem	CalculatePriceChanges	9.3
Saleslogix Application Entities	SalesOrderItem	ExtendPriceOverride	9.2
Saleslogix Application Entities	SalesOrderItem	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	SalesOrderItem	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	SalesOrderItem	SetDocTotalDiscountOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentPercentOnChange	9.3
Saleslogix Security Support	User	CreateUserMFADevice	9.3
Saleslogix Security Support	User	DeleteUserMFADevice	9.3
Saleslogix Security Support	User	GetLoggedInUsers	9.2
Saleslogix Security Support	User	GetUserMFADevices	9.3
Saleslogix Security Support	User	ResetUserMFADevices	9.3
Saleslogix Security Support	User	SaveUserMFADevices	9.3
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentPercentOnChange	9.2
Saleslogix System Support	ApplicationBuilderRequest	DeployAllPortals	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortal	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortalsByInstanceId	9.1
Saleslogix System Support	ApplicationBuilderRequest	GenerateEmlRequest	9.1

Package	Entity	Business Rule	Version
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
Saleslogix System Support	License	AddLicense	9.2
Saleslogix System Support	OfficeProfile	GetDomains	9.3
Saleslogix System Support	OfficeProfile	GetSystemSummaryReport	9.3

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
CONVERT_BIT_DATATYPE_COLUMNS : MSSQL : Trigger	9.2

Database Objects – Web Actions bundle

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

Database Object	Version
Add_Cluster_Index (MSSQL)	9.4
Add_Cluster_Index (Oracle)	9.4
Alter_VFS_Delete_Triggers (MSSQL)	9.4
CleanDuplicatePicklists (All)	9.2
Clear Broken Address Relationships (MSSQL)	9.4

Database Object	Version
CreateNew_CalculatedFieldData_Schema (MSSQL)	9.1
CreateNew_CalculatedFieldData_Schema (Oracle)	9.1
Delete_CurrencyConfiguration (All)	9.3
Delete_Obsolote_SyncHistoryForms(All)	9.1
Drop Outbound Retry Count custom setting (All)	9.4
InsertSecTableDef_CalculatedField_Records (All)	9.1
InsertSecTableDef_CalculatedField_Records (MSSQL)	9.2
InsertSecTableDef_CalculatedField_Records (Oracle)	9.2
Patch pre-existing Bod Packs	9.3
Remove_Duplicate_Indexes (MSSQL)	9.4
Remove_Duplicate_Indexes (Oracle)	9.4
Update_CRMWorkflow_BOEXT_CONT_Version (All)	9.4
Update_CRMWorkflow_Version (All)	9.3
Update_IonWorkflow_OmniDirectionalFlag (All)	9.3
UpdateSystemInfo (All)	9.2
UpdateSystemInfoCoreVersion (All)	9.4
UpdateWorkflowPropertyView (MSSQL)	9.4
UpdateWorkflowPropertyView (Oracle)	9.4
Update WriteInProducts Category to Saleslogix (All)	9.4

Plugins

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

Plugin Name	Version
[DashboardWidget] System:Welcome (Infor 9.2)	9.2
[DashboardWidget] System:GroupList (Infor 9.3)	9.3

Plugin Name	Version
(Forms Opportunity:Notes-History)	9.1
(Forms Account:Notes-History)	9.1
(Forms Account:Opportunities)	9.4
(Forms Account:Reseller Opportunities)	9.4
(Forms Account:Tickets)	9.4
(Forms Contact:Notes-History)	9.1, 9.3
(Forms Lead:Notes-History)	9.1
(Forms System:Add Edit Sales Order)	9.2
(Forms System:Ticket Detail)	9.2
(Global Script System:Global SpeedSearch)	9.4
[Group] CUSTOMERJOURNEY:ActiveCustomerJourneys(Infor 9.2)	9.2
[Group] CUSTOMERJOURNEY:AllCustomerJourneys(Infor 9.2)	9.2
[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
[Group] PLUGIN:Groups (Infor 9.3)	9.3
[Group] PLUGIN:Dashboards (Infor 9.3)	9.3
[Group] PLUGIN:UnreleasedPlugins (Infor 9.3)	9.3
[Group] PLUGIN:Reports (Infor 9.3)	9.3
[Group] PLUGIN:AllPlugins (Infor 9.3)	9.3
[Group] PLUGIN:MailMergeTemplates (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:Active CRM Workflows (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:My CRM Workflows (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:All CRM Workflows (Infor 9.3)	9.3

Plugin Name	Version
[ResponsiveDashboardPage] System:My Dashboard (Infor 9.1)	9.1
Menus System: Standard Menus)	9.4
(Scripts, VBscript System:Notes History Common)	9.1
(Scripts, VBscript System:SLX Lead Support)	9.2
(Scripts, VBscript System:SP_SalesProcessFunctions)	9.4

Execute SQL statements (.sxb bundle)

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
UPDATE SYSDBA.SYSTEMINFO set DBVERSION - '9.2'	9.2
UPDATE SYSDBA.SYSTEMINFO set SNCVERSION - '9.2.0.0'	9.2
UPDATE SYSDBA.SYSTEMINFO set DBVERSION - '9.3'	9.3
UPDATE SYSDBA.SYSTEMINFO set SNCVERSION - '9.3.0.0'	9.3
UPDATE SYSDBA.SYSTEMINFO set DBVERSION - '9.4'	9.4
UPDATE SYSDBA.SYSTEMINFO set SNCVERSION - '9.4.0.0'	9.4

Reports

None added since 9.0

Picklists

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

Picklist	Description	Version
Account Status	Added pick list item	9.1
Account Reason Lost	Added pick list	9.1
ApplicationBuilderRequestStatus	Added pick list	9.1
ApplicationBuilderRequestType	Added pick list	9.1
Customer Journey Probability	Added pick list	9.2
Reason Lost	Added pick list item	9.1

Windows Forms

None added since 9.0

Web Forms

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

Package	Entity	Form Name	Description	Version
Saleslogix Activity Support	UserCalendar	EditCalPermissions	Updated form to remove colons, (INFORCRM-32443)	9.4
Saleslogix Application Entities	Account	AccountAssets	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	Account	AccountContacts		9.2
Saleslogix Application Entities	Account	AccountDetails	Changing Status to 'Closed' opens the new ClosedLost form (INFORCRM-29132)	9.1
Saleslogix Application Entities	Account	AccountErpDetails		9.1
Saleslogix Application Entities	Account	AccountExtendedDetails	Added ClosedDate and ReasonLost fields (INFORCRM-29132)	9.1

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	Account	ClosedLost	New form added to capture the Closed Date and Reason the account Status was changed to Closed (INFORCRM-29132)	9.1
Saleslogix Application Entities	Account	ErpBillTos	Save icon missing tooltip. (INFORCRM-30797)	9.3
Saleslogix Application Entities	Account	InsertAccount	Lead Source is now a pick list, not a lookup (INFORCRM-29107) Default picklist values for custom picklist are not written to the database (INFORCRM-21086)	9.1
Saleslogix Application Entities	AccountProduct	AddEditAccountProduct	Comment Use Date Stamp icon was moved above (INFORCRM-28556)	9.1
Saleslogix Application Entities	BackOffice	BackOfficeBOEPAService		9.2
Saleslogix Application Entities	BackOffice	BackOfficeCustomMappings	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	BackOffice	InsertBackOffice		9.2
Saleslogix Application Entities	BackOfficeAcctEntity	AddEditBackOfficeAcctEntity	Added Default Customer ID field to specify the ERP-based customer number for integrated pricing of opportunities, quotes, and sales orders of unpromoted accounts (INFORCRM-30445 and INFORCRM-30446)	9.2
Saleslogix Application Entities	BODFieldMapping	FieldMappingDetail		9.2
Saleslogix Application Entities	BODMapping	InsertBODMapping	Save icon missing tooltip. (INFORCRM-30797)	9.3
Saleslogix Application Entities	BOEPAMapping	BOEPAMappingDetail		9.2
Saleslogix Application Entities	Campaign	CampaignDetails		9.2
Saleslogix Application Entities	Contact	ContactDetails	Updated label from "Dear" to "Salutation" (INFORCRM-12127)	9.4
Saleslogix Application Entities	Contract	ContractComments	Added tooltip to Save button. (INFORCRM-30823)	9.3

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	Contract	ContractCoveredAssets	Grid fix (INFORCRM-27962)	9.2
Saleslogix Application Entities	Contract	InsertContract	Comment Use Date Stamp icon was moved above (INFORCRM-28556)	9.2
Saleslogix Application Entities	CustomerJourney	CustomerJourneyDetails	New form for Customer Journey detail view.	9.2
Saleslogix Application Entities	CustomerJourney	InsertCustomerJourney	New form for adding a customer journey.	9.2
Saleslogix Application Entities	CustomerJourneyStage	AddEditStage	New form for adding or editing a customer journey stage.	9.2
Saleslogix Application Entities	CustomerJourneyStage	CopyStage	New form for copying a customer journey stage.	9.2
Saleslogix Application Entities	CustomerJourneyStep	CopyStep	New form for copying a customer journey step.	9.2
Saleslogix Application Entities	Defect	DefectDetails	Description Use Date Stamp icon was moved above (INFORCRM-28556).	9.2
Saleslogix Application Entities	Defect	InsertDefect	Comment Use Date Stamp icon was moved above (INFORCRM-28556)	9.2
Saleslogix Application Entities	EmailTemplate	EmailTemplateProperties	Column heading changed" PickList Name" to "Pick List Name" (INFORCRM-29059)	9.1
Saleslogix Application Entities	ERPBillTo	ErpBillToDetails		9.3
Saleslogix Application Entities	ERPPayFrom	ErpPayFromDetails	Integrated account/Ship To/Bill To records gets hard deleted even the Delete behavior set to Soft (INFORCRM-29919)	9.3
Saleslogix Application Entities	ERPPerson	ErpPersonDetails	ErpShipTo content fails due to optimistic locking failure on ErpCustomerType picklist content. (INFORCRM-30933)	9.3
Saleslogix Application Entities	ERPShipTo	ErpShipToDetails	Integrated account/Ship To/Bill To records gets hard deleted even the Delete behavior set to Soft (INFORCRM-29919)	9.3
Saleslogix Application Entities	ExchangeRate	ExchangeRateDetails	Form updated for missing space in Conversion Rate label (INFORCRM-	9.4

Package	Entity	Form Name	Description	Version
			30848)	
Saleslogix Application Entities	Forecast	InsertForecast	Updated Start Date and End Date with an asterisk since they are required fields (INFORCRM-28555)	9.2
Saleslogix Application Entities	Integration	IntegrationConfigGroup		9.2
Saleslogix Application Entities	Integration	IntegrationDetail	Updated the help text link for OAuth integrations, GMail and ExchangeSync to be dynamic based on the integration selected. (INFORCRM-32897)	9.4
Saleslogix Application Entities	Integration	IntegrationEQConfiguration	The Save icon tooltip was undefined. (INFORCRM-30847)	9.3
Saleslogix Application Entities	Integration	IONWorkFlows		9.2
Saleslogix Application Entities	Integration	NormalizeEntities	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	IONWorkflow	ActiveIONWorkflows		9.1
Saleslogix Application Entities	IONWorkflowDefinition	CRMWorkflowProperties		9.1
Saleslogix Application Entities	IONWorkflowDefinition	CRMWorkflowSteps	Removed columns for Edit, Copy and Active checkbox in support of new CRM Workflow Designer tab.	9.1
Saleslogix Application Entities	IONWorkflowDefinition	InsertIONWorkflowDefinition	Entity drop-down includes additional entities supported for CRM Workflows.	9.1
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowDefinitionCopy	Dialog box resized to remove need for a horizonal scrollbar. (INFORCRM-31936)	9.3
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkFlowDetails	Entity drop-down includes additional entities supported for CRM Workflows.	9.1
Saleslogix Application Entities	IONWorkflowDefinition	IONWorkflowFieldMappings		9.1
Saleslogix Application Entities	Lead	InsertLead	Lead Source is now a pick list, not a lookup (INFORCRM-29107)	9.1
Saleslogix Application Entities	Lead	LeadDetails	Lead Source is now a pick list, not a lookup (INFORCRM-29107)	9.1

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	Opportunity	InsertOpportunity		9.2
Saleslogix Application Entities	Opportunity	OpportunityClosedWon	Updates the DocActualPrice when an opportunity is closed as won in a multi-currency environment. (INFORCRM-31202)	9.3
Saleslogix Application Entities	Opportunity	OpportunityCompetitors	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	Opportunity	OpportunityContacts	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	Opportunity	OpportunityDetails		9.2
Saleslogix Application Entities	Opportunity	OpportunityProducts		9.2
Saleslogix Application Entities	Opportunity	OpportunityProducts	Fixed performance issue when adding a package 30 or more products. (INFORCRM-32002)	9.3
Saleslogix Application Entities	OpportunityProduct	EditOpportunityProduct	Added the ability to update the unit price of a zero priced product (INFORCRM-29111)	9.1
Saleslogix Application Entities	Product	ProductDetails	Added Is Bundle check box to identify if the product contains sub-products or parts (INFORCRM-29337)	9.1
Saleslogix Application Entities	Product	ProductParts	New tab to manage product parts (or other products) associated with the product. Only displays if the product "Is Bundle" check box is selected (INFORCRM-29337)	9.1
Saleslogix ApplicaionEntities	Qualification	AddEditQualification		9.4
Saleslogix Application Entities	Quota	InsertQuota	Updated Start Date and End Date with an asterisk since they are required fields (INFORCRM-28555)	9.2
Saleslogix Application Entities	Quote	EditQuoteDetail	Fixed error loading the SmartParts/Quote/EditQuoteDetail.ascx (INFORCRM-32378)	9.4

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	Quote	InsertQuote	Requested By label changed to "Contact" and is automatically populated with the associated account's primary contact (INFORCRM-29119)	9.1
Saleslogix Application Entities	Quote	QuoteBillToil	Fixed border for lookup fields (INFORCRM-32690) Updated form to remove colons (INFORCRM-32443) Sales Order ID field moved to first column, Closed Date added to second column below Expiration Date (INFORCRM-29004)	9.4
Saleslogix Application Entities	Quote	QuoteDetails	Sales Order ID field moved to first column, Closed Date added to second column below Expiration Date (INFORCRM-29004)	9.1
Saleslogix Application Entities	Quote	QuoteDiscountChargeItems	Updated for IsLock business rule to prevent updates if a quote status is if the status is "Pending Approval". (INFORCMR-32914)	9.4
Saleslogix Application Entities	Quote	QuoteErpDetails	Updated warning message at account lookup for Price services. (INFORCRM-30543)	9.3
Saleslogix Application Entities	Quote	QuoteExtendedDetails	Requested By label changed to "Contact" and if the account is changed, will automatically be updated with the new account's primary contact (INFORCRM-29120)	9.1
Saleslogix Application Entities	Quote	QuoteProducts	Added the Bundle column (INFORCRM-29789) Added toolbar buttons to reorder products (INFORCRM-15511)	9.1
Saleslogix Application Entities	Quote	QuoteProducts	Fixed performance issue when adding a package 30 or more products. (INFORCRM-32002)	9.3
			Fixed issue with duplicate line items	9.3

Package	Entity	Form Name	Description	Version
			(INFORCRM-32005)	
Saleslogix Application Entities	Quote	QuoteShipTo	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	Quote	QuoteSoldTo	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	QuoteItem	EditQuoteItem	Fixed incorrect Extended Price being displayed when Prices (Unit Price) are overridden (INFORCRM-29021)	9.1
Saleslogix Application Entities	Return	InsertReturn		9.2
Saleslogix Application Entities	ReturnShippedProduct	AddEditReturnShippedProduct		9.2
Saleslogix Application Entities	SalesOrder	InsertSalesOrder	Requested By label changed to "Contact" and is automatically populated with the associated account's primary contact (INFORCRM-29119)	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderBillTo	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderDetails	Closed Date added to second column below Expriation Date (INFORCRM-29004)	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderDiscountChargeItems	Updated for IsLock business rule to prevent updates if a sales orderstatus is if the status is "Pending Approval". (INFORCRM-32914)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderErpDetails	Updated warning message at account lookup for Price services. (INFORCRM-30543)	9.3
Saleslogix Application Entities	SalesOrder	SalesOrderExtendedDetails	Requested By label changed to "Contact" and if the account is changed, will automatically be updated with the new account's primary contact (INFORCRM-29120)	9.1

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	SalesOrder	SalesOrderPayFrom	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderProducts	Added the Bundle column (INFORCRM-29789) Added toolbar buttons to reorder products. (INFORCRM-15511)	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderProducts	Fixed performance issue when adding a package 30 or more products. (INFORCRM-32002)	9.3
			Fixed issue with duplicate line items (INFORCRM-32005)	9.3
Saleslogix Application Entities	SalesOrder	SalesOrderShipTo	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderSoldTo	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application Entities	SalesOrderItem	EditSalesOrderItem	Fixed incorrect Extended Price being displayed when Prices (Unit Price) are overridden. (INFORCRM-29021)	9.1
Saleslogix Application Entities	Ticket	InsertTicket	Fixed Contact and Account being cleared if the Svc Info option is selected in the Windows client. (INFORCRM-29157)	9.1
Saleslogix Application Entities	Ticket	TicketDetails		9.2
Saleslogix Application Entities	Ticket	TicketExtendedDetails		9.2
Saleslogix Application Entities	TicketActivityItem	AddEditTicketActivityItem	Updated form to remove colons (INFORCRM-32443)	9.4
Saleslogix Application Entities	TicketAreaOwner	InsertTicketAreaOwner	New form for Ticket Auto Assignment (INFORCRM-27981)	9.2
Saleslogix Application Entities	Urgency	Insert Urgency	New form for managing Urgencies	9.3

Package	Entity	Form Name	Description	Version
			(INFORCRM-30887)	
Saleslogix Application Entities	WorkflowInstance	WorkflowInstances	Fixed Active Step displays "Null" (INFORCRM-25929)	9.1
Saleslogix Application Entities	WorkflowInstance	WorkflowStepInstances		9.1
Saleslogix Application Entities	WorkflowStepInstance	WorkflowStepInstanceDetail	Added a middle column to display Started date, Completed date, Status, and Notes (INFORCRM-29731)	9.1
Saleslogix Application Entities	WorkflowStepInstance	AddApproversOrObserver	Updated to remove debugger statements (INFORCRM-31665)	9.4
Saleslogix Application Entities	Integration	IntegrationIONWorkFlows		9.1
Saleslogix Application Entities	Opportunity	InsertOpportunity	Changed Lead Source from a lookup to a pick list (INFORCRM-29107)	9.1
Saleslogix Application Entities	Opportunity	OpportunityDetails	Lead Source label changed from "Source" to "Lead Source" and is a pick list instead of a lookup (INFORCRM-29107)	9.1
Saleslogix Application Entities	Opportunity	OpportunityProducts	Added the Bundle column (INFORCRM-29789) Added toolbar buttons to reorder products. (INFORCRM-15511)	9.1
Saleslogix Security Support	Department	InsertDepartment	Updated to set Name field Max length to 64 (INFORCRM-32171)	9.4
Saleslogix Security Support	Team	InsertTeam	Updated to set Name field Max length to 64 (INFORCRM-32171)	9.4
Saleslogix Security Support	Team	TeamMembers	Nested teams can cause the Web Client to crash(INFORCRM-23471) The lookup to associate team members only includes users, not departments or other teams. (INFORCRM-28534)	9.1
Saleslogix Security Support	Users	LoggedInUsers	New form to view logged in users.	9.2

Package	Entity	Form Name	Description	Version
			(INFORCRM-29276)	
Saleslogix Security Support	Users	UserDetails	Added new method to support Deployment Manager	9.1
Saleslogix Security Support	Users	UserErpDetails	Added new method to support Deployment Manager	9.1
Saleslogix Security Support	Users	UserSecurity	Updated for resetting a user's multi-factor authentication devices.	9.3
Saleslogix System Support	ApplicationBuilderRequest	AddPortals	Added for Deployment Manager	9.4
Saleslogix System Support	ApplicationBuilderRequest	DeletePortal	Added for Deployment Manager	9.4
Saleslogix System Support	ApplicationBuilderRequest	GenerateEmlRequest		9.4
Saleslogix System Support	ApplicationBuilderRequest	GetAllPortals		9.4
Saleslogix System Support	ApplicationBuilderRequest	UpdatePortal	Added for Deployment Manager	9.4
Saleslogix System Support	License	Add License	New form for adding a license (INFORCRM--27975)	9.2
Saleslogix System Support	OfficeProfile	DocumentPaths	New form for defining Library and Attachment folders and paths (INFORCRM--27978)	9.1
Saleslogix System Support	OfficeProfile	Email Setup	Updated to include Send to CRM attachment options and domain exclusions. (INFORCRM-30890)	9.3
Saleslogix System Support	OfficeProfile	Groups	Save icon missing tooltip. (INFORCRM-30944)	9.3
Saleslogix System Support	OfficeProfile	ManageCurrency	Updated form for new Currency Control Decimal Digits option (INFORCRM-32638)	9.4
Saleslogix System Support	OfficeProfile	ManageLicensing	Updated form for adding a license (INFORCRM--27975)	9.2
Saleslogix System Support	OfficeProfile	OfficeProfileSettings		9.2
Saleslogix System Support	OfficeProfile	ServiceSupport	Form change to remove Ticket Auto Assignment fields (INFORCRM-27981)	9.2

Package	Entity	Form Name	Description	Version
			Form change to add Urgency (INFORCRM-30887) and Customer Portal Web Access user management. (INFORCRM-30904)	9.3
Saleslogix System Support	OfficeProfile	TicketAutoAssignment	New form for Ticket Auto Assignment (INFORCRM-27981)	9.2
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
QFDataGrid (Control Rendering Template)	9.4
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
QFSLXPersonName (Control Rendering Template)	9.1
QFSLXSDataLookup (Control Rendering Template)	9.3
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
Infor CRM Customer Portal	SpeedSearch	SpeedSearchV2 (Custom)	9.2
SlxClient	Account Detail	ClosedLost	9.1
SlxClient	Account Detail	JourneyInstanceMainView (Custom)	9.2
SlxClient	Account Detail	JourneyMainview360 (Custom)	9.3
SlxClient	Account Detail	SyncResults	9.1
SlxClient	Account Detail	UpdateAccountOptions (Custom)	9.3
SlxClient	Account Detail	WorkflowInstances	9.1
SlxClient	Back Office Detail	AddEditBOEPAService	9.2
SlxClient	Bill To Details	AddEditERPPayFrom	9.2
SlxClient	Bill To Details	SyncResults	9.1
SlxClient	Contact Detail	AddEditContactLeadSource	9.2
SlxClient	Contact Detail	ContactCard	9.1
SlxClient	Contact Detail	JourneyInstanceMainView (Custom)	9.2
SlxClient	Contact Detail	SyncResults	9.1
SlxClient	Contact Detail	WorkflowInstances	9.1
SlxClient	Contour Lead Search	LeadDistanceSearch (Custom)	9.4
SlxClient	Contour Opportunity Search	OpportunityDistanceSearch (Custom)	9.4
SlxClient	Customer Journey Detail	AddEditStage	9.2
SlxClient	Customer Journey Detail	CopyStage	9.2
SlxClient	Customer Journey Detail	CopyStep	9.2
SlxClient	Customer Journey Detail	CustomerJourneyDetails	9.2
SlxClient	Customer Journey Detail	InsertCustomerJourney	9.2
SlxClient	Customer Journey Detail	JourneyStagesSteps (Custom)	9.2

Portal	Page	SmartPart	Version
SlxClient	Customer Journey Detail	LiveGroupViewer (Custom)	9.2
SlxClient	Database Manager	DatabaseManagerTask (Custom)	9.3
SlxClient	Database Manager	SDataListViewer (Custom)	9.3
SlxClient	Email Template Details	EmailTemplateDetails	9.1
SlxClient	ERP Invoice Detail	WorkflowInstances	9.1
SlxClient	History Groups	LiveGroupViewer (Custom)	9.1
SlxClient	Insert Customer Journey	InsertCustomerJourney	9.2
SlxClient	Integration Detail	AddEditLink	9.2
SlxClient	Integration Detail	IntegrationContourAbout	9.2
SlxClient	Lead Capture Configuration	InsertLeadCaptureMapping	9.4
SlxClient	Lead Capture Configuration	LeadCaptureConfigurationDetail	9.4
SlxClient	Lead Capture Configuration	LeadCaptureMappings	9.4
SlxClient	Lead Capture Mapping	LeadCaptureMappingDetail	9.4
SlxClient	Lead Capture Mapping	LeadCaptureMappingItemDetails	9.4
SlxClient	Lead Capture Mapping	LeadCapturePropertyMappingEdit	9.4
SlxClient	Lead Capture Mapping	LeadCapturePropertyMappingInsert	9.4
SlxClient	Lead Detail	JourneyInstanceMainView (Custom)	9.2
SlxClient	Lead Detail	WorkflowInstances	9.1
SlxClient	Lead Source Detail	WorkflowInstances	9.1
SlxClient	OfficeProfile	AddLicense	9.2
SlxClient	OfficeProfile	DocumentPaths	9.1
SlxClient	OfficeProfile	InsertDomains (Custom)	9.3
SlxClient	OfficeProfile	InsertTicketAreaOwner	9.2
SlxClient	OfficeProfile	InsertUrgency	9.3
SlxClient	OfficeProfile	TicketAutoAssignment	9.2
SlxClient	Opportunity Detail	JourneyInstanceMainView (Custom)	9.2

Portal	Page	SmartPart	Version
SlxClient	Opportunity Detail	SyncResults	9.1
SlxClient	Options	UserMFAOptions (Custom)	9.3
SlxClient	Pay From Details	SyncResults	9.2
SlxClient	Plugin Manager	LiveGroupViewer (Custom)	9.3
SlxClient	Plugin Manager	ReleasePluginDetails	9.3
SlxClient	Product Detail	ProductParts	9.1
SlxClient	Qualification	AddEditQualification	9.1
SlxClient	Quote Detail	EditQuoteItem	9.4
SlxClient	Quote Detail	JourneyInstanceMainView (Custom)	9.3
SlxClient	Quote Detail	SyncResults	9.1
SlxClient	Release Plugin	LiveGroupViewer (Custom)	9.3
SlxClient	Release Plugin	ReleasePluginDetails	9.3
SlxClient	Return Detail	WorkflowInstances	9.1
SlxClient	Return Detail	JourneyInstanceMainView (Custom)	9.3
SlxClient	Sales OrderDetail	JourneyInstanceMainView (Custom)	9.3
SlxClient	Sales Order Detail	SyncResults	9.1
SlxClient	Ship To Details	SyncResults	9.1
SlxClient	SpeedSearch Manager	SDataListViewer (Custom)	9.3
SlxClient	SpeedSearch Manager	SpeedSearchManagerFilters(Custom)	9.3
SlxClient	SpeedSearch Manager	SpeedSearchManagerTasks (Custom)	9.3
SlxClient	SpeedSearch	SpeedSearchV2 (Custom)	9.2
SlxClient	Ticket Detail	JourneyInstanceMainView (Custom)	9.3
SlxClient	Ticket Detail	SpeedSearchV2 (Custom)	9.2
SlxClient	Ticket Detail	WorkflowInstances	9.1
SlxClient	User Detail	JourneyInstanceMainView (Custom)	9.3
SlxClient	User Detail	LoggedInUsers	9.2

Portal	Page	SmartPart	Version
SlxClient	User Detail	WorkflowInstances	9.1
SlxClient	WorkflowDefinition	AddEditCRMWorkflowStep	9.2
SlxClient	WorkflowDefinition	CRMWorkflowDesigner (Custom)	9.1
SlxClient	WorkflowDefinition	IONWorkFlowDetails (Custom)	9.3

Modules

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

Portal	Page/Location	Location	Module	Version
SlxClient	History Groups	Pages|History Groups|Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewer Module	9.1
SlxClient	Customer Journey Detail	Pages|Customer Journey Detail|Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewer Module	9.2
SlxClient	Modules	Modules	Sage.SalesLogix.Web.Modules.DeveloperToolsModule	9.1
SlxClient	Plugin Manager	Pages|Plugin Manager|Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewer Module	9.3
SlxClient	Release Plugin	Pages|Release Plugin | Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewer Module	9.3

Menus

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

Portal	Menu	Menu Item	Version
SlxClient	Administration		9.1
		New Customer Journey	9.2
		Sync History	9.2
SlxClient	Developer Tools		9.1
		Deploy	9.1

Portal	Menu	Menu Item	Version
		Install Bundle	9.1
		Manage Deployments	9.4
		Rebuild Database Schema	9.1
		Rebuild Web Platform	9.1
		Request Deploy Access	9.1
		View Bundles	9.1
		View Logs	9.1
SlxClient	Tools		9.1
		Contour Distance Search	9.4
		SpeedSearch	9.2
		Execute Query	9.3
		System Summary Report	9.3

Navigation

The following lists navigation added or updated since v9.0

Portal	Navigation	Item	Version
SlxClient	Administration	Customer Journeys	9.2
SlxClient	Administration	Custom Settings	9.2
SlxClient	Administration	Database Manager	9.3
SlxClient	Administration	Entity Manager	9.2
SlxClient	Administration	Lead Capture	9.4
SlxClient	Administration	Plugin Manager	9.3
SlxClient	Administration	SpeedSearch Manager	9.3
SlxClient	Marketing	History	9.1
SlxClient	Sales	History	9.1

Portal	Navigation	Item	Version
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	Customer Journey	Create New Group	9.2
SlxClient	Customer Journey	Lookup Customer Journey	9.2
SlxClient	Customer Journey	New Customer Journey	9.2
SlxClient	Defect Activity Rate	Lookup Defect Activity Rate	9.4
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
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
SlxClient	Plugin Manager	Lookup Plugin	9.3

Tasklets

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

Tasklet	Version
PluginManagerTasks	9.3

Jobs

The following lists Job Service jobs added or updated since v9.0.

Portal	Location	Job	9.0.x
Infor CRM Job Service	Jobs	Sage.SalesLogix.BusinessRules.Jobs.ApplicationBuilderCleanupJob	9.1
Infor CRM Job Service	Jobs	Sage.SalesLogix.BusinessRules.Jobs.LeadCaptureConversionJob	9.4
Infor CRM Job Service	Jobs	Sage.SalesLogix.BusinessRules.Jobs.ReassignActivitiesJob	9.2

Services

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

Portal	Location	Service Name	9.0.x
Infor CRM Job Service	SupportFiles|Services	Sage.Platform.Security.IRoleSecurityService	9.1

Configuration Files

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

Portal	Location	Filename	Description	Version
SData	SupportFiles	Web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ■ Added reference to ApplicationBuilder service for downloadable Application Architect.	9.1
SData	SupportFiles	Web.config	■ Binding Redirect added for System.Formats.Asn 1	9.3
SData	SupportFiles	web.config	■ Updated to replace the existing CodeDOM providers with the Microsoft.CodeDom.Providers.DotNetCompilerPlatform	9.4
SDataCustomer	SupportFiles	Web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ■ Binding Redirect added for System.Formats.Asn 1	9.3
SData Integration Host	SupportFiles	Web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe	9.1

Portal	Location	Filename	Description	Version
			■ Added reference to ApplicationBuilder service for downloadable Application Architect.	
SlxClient	SupportFiles	appSettings.config	■ Updated for storing password hashes. (INFORCRM-30619)	9.2
SlxClient	SupportFiles	appSettings.config	■ Help Domain URL updated for 9.4	9.4
SlxClient	SupportFiles	web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ■ Added reference to ApplicationBuilder service for downloadable Application Architect.	9.1
SlxClient	SupportFiles	web.config	■ Updated to allow authentication for the static content to be bypassed.	9.2
SlxClient	SupportFiles	web.config	■ Binding Redirect added for System.Formats.Asn 1 ■ Binding Redirect added for MimeKit ■ Binding Redirect added for MailKit ■ Eliminated infinite redirect on the Dashboard ■ Add MfaAuthModule for Multi-Factor Authentication.	9.3
SlxClient	SupportFiles	web.config	■ Updated to replace the existing CodeDOM providers with the Microsoft.CodeDom.Providers.DotNetCompilerPlatform ■ Added a new Http handler and location to support Lead Capture ■ Updated sprite map use of .png files with .webp files for better compression to improve performance.	9.4
Infor CRM Customer Portal	SupportFiles	appSettings.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe	9.1
Infor CRM Customer Portal	SupportFiles	appSettings.config	■ Changes for password self-service email settings now set in Office Profile (INFORCRM-30192)	9.2
Infor CRM Customer Portal	SupportFiles	appSettings.config	■ Help Domain URL updated for 9.4	9.4
Infor CRM Customer Portal	SupportFiles	web.config	■ Binding Redirect added for System.Formats.Asn 1 ■ Binding Redirect added for MimeKit	9.3

Portal	Location	Filename	Description	Version
			■ Binding Redirect added for MailKit	
Infor CRM Customer Portal	SupportFiles	web.config	■ Updated sprite map use of .png files with .webp files for better compression to improve performance.	9.4
Infor CRM Job Service	SupportFiles	tenant.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe	9.1
Infor CRM Job Service	SupportFiles	tenant.config	■ Common Logging.Log4Net.Universal.Log4NetFactory Adapter.	9.2
Infor CRM Job Service	SupportFiles	tenant.config	■ Binding Redirect added for: Newtonsoft.Json ■ Binding Redirect added for System.Formats.Asn 1 ■ Binding Redirect added for MimeKit ■ Binding Redirect added for MailKit	9.3
Infor CRM Job Service	SupportFiles	web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ■ Common Logging.Log4Net.Universal.Log4NetFactory Adapter.	9.1
Infor CRM Job Service	SupportFiles	web.config	■ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ■ Common Logging.Log4Net.Universal.Log4NetFactory Adapter.	9.3
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

The following lists custom settings added or updated since in v9.0.

Custom Setting	Description	Version
AllowPartitionedCookieAttribute	Specify if the Partitioned cookie attribute is included in requests. ■ Default is True and should remain as True for most implementations. ■ Single-tenant environments with multiple web servers going through a load balancer should set to False. Note: In these environments, Including that cookie was causes issues with the "stickiness" of the load balancer requests, causing other issues.	9.3
EmailSubject	The email subject of the MFA email message Specify the text to display in the subject of the email notification message for Multi-Factor Authentication when using an Email authentication method.	9.3
Enable SMTP Tracing	Enables or disables SMTP tracing for Multi-Factor Authentication when using an Email authentication method. ■ False disables SMTP tracing This is the default value ■ True enables SMTP tracing	9.3
MfaAuthModuleSkipList	Specify a comma delimited list of pages that should cause the MfaAuthModule to stop processing its Multi-Factor Authentication logic. By default this list includes: ■ SLXWinAuthenication.aspx ■ WinAuthLoad.aspx	9.3
MfaFormsAuthReturnUrlSkipList	A comma delimited list of pages that should cause the Login.aspx page to ignore the ReturnUrl and redirect to the Default.aspx page instead	9.4
MfaWinAuthNextUrlSkipList	A comma delimited list of pages that should cause the WinAuthLoad.aspx page to ignore the next_url and to redirect to the Default.aspx page	9.4
ReplyToDisplayName	The reply to display name Specify the display name to use if a user replies to the email notification for Multi-Factor Authentication when using an Email authentication method.	9.3

Custom Setting	Description	Version
ReplyToEmailAddress	The reply to email address Specify the email address to use if a user replies to the email notification for Multi-Factor Authentication when using an Email authentication method.	9.3
SchedulingWatchDogTimeoutMinutes	The SLXJobServer Watch Dog functionality scans all executions in either the Running or Interrupting status every 30 seconds. Use the SchedulingWatchDogTimeoutMinutescustom setting to specify the maximum acceptable duration, in minutes, for any individual SLX Job Server based process. ■ -1 disables the feature This is the default value ■ Valid entries are 1-120. ■ 30, recommended value for enabling the feature	9.2
SyncWorkerJobLimit	Specifies the allowed number of concurrent worker jobs for calendar and contact sync.	9.4
TotpIssuerDisplayName	Specify the text to be displayed in the authentication application account for Multi-Factor Authentication when using an authentication application method.	9.3
WriteInProducts	Specify True or False to determine if custom, write-in products are allowed to be added to quotes and sales orders. The category was changed from Back Office Extension to Saleslogix since this applies generally to Infor CRM SLX and is not limited to Back Office (ERP) integrated environments. This option is no longer listed on the Integration - Back Office Extension Options tab.	9.4

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
	Updated to include: ■ Administration/CustomerJourney/Add ■ Administration/CustomerJourney/Delete ■ Administration/CustomerJourney/Edit ■ Administration/CustomerJourneyinstance/Delete ■ Administration/CustomerJourney/View ■ Entities/User/LoggedInUsers	9.2
	Updated to include: ■ Administration/Plugin/ReleaseToEveryone ■ Administration/SpeedSearchManager/AddIndex ■ Administration/SpeedSearchManager/AddSchedule ■ Administration/SpeedSearchManager/DeleteIndex ■ Administration/SpeedSearchManager/DeleteSchedule ■ Administration/SpeedSearchManager/EditIndex ■ Administration/SpeedSearchManager/EditSchedule ■ Administration/SpeedSearchManager/ManageSettings ■ Administration/SpeedSearchManager/RunSchedule ■ Administration/SpeedSearchManager/View	9.3
	Updated to include: ■ Administration/LeadCaptureConfiguration/View ■ Administration/LeadCaptureConfiguration/Edit	9.4

Role	Description	Version
Contour	Allows access to Contour map features including places.	
	Updated to include: ▪ Contour/Map/Lead ▪ Contour/Map/Opportunity	9.4
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. ▪ Toolbar/Developer	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
	Updated to include: ▪ Import/History/View	9.4

Secured Actions

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

Secured Action	Role/Description	Version
Administration/CustomerJourney/Add	Administrative role: grants permission to create customer journeys.	9.2
Administration/CustomerJourney/Delete	Administrative role: grants permission to delete customer journeys.	9.2
Administration/CustomerJourney/Edit	Administrative role: grants permission to edit customer journeys.	9.2
Administration/CustomerJourneyInstance/Delete	Administrative role: grants permission to delete customer journey instances from the Customer Journey tab on supported details views.	9.2

Secured Action	Role/Description	Version
Administration/CustomerJourney/View	Administrative role: grants permission to view Customer Journey lists and detail views.	9.2
Administration/LeadCaptureConfiguration/View	Administrative role: grants permission to view the Lead Capture Configuration view.	9.4
Administration/LeadCaptureConfiguration/Edit	Administrative role: grants permission to view the Lead Capture Configuration view.	9.4
Administration/License/Add	Administrative role: Grants permission to add an Infor CRM license. Not assigned to any role	9.2
Administration/License/Delete	Grants permission to delete an Infor CRM license. Not assigned to any role	9.2
Administration/Plugin/ReleaseToEveryone	Administrative role: grants permission to release groups to "Everyone" in Query Builder.	9.3
Administration/SpeedSearchManager/View	Administrative role: grants permission to view SpeedSearch Manager	9.3
Administration/SpeedSearchManager/AddIndex	Administrative role: grants permission to add SpeedSearch indexes	9.3
Administration/SpeedSearchManager/EditIndex	Administrative role: grants permission to edit SpeedSearch indexes	9.3
Administration/SpeedSearchManager/DeleteIndex	Administrative role: grants permission to delete SpeedSearch indexes	9.3
Administration/SpeedSearchManager/AddSchedule	Administrative role: grants permission to add SpeedSearch schedules	9.3
Administration/SpeedSearchManager/EditSchedule	Administrative role: grants permission to edit SpeedSearch schedules	9.3
Administration/SpeedSearchManager/DeleteSchedule	Administrative role: grants permission to edit SpeedSearch schedules	9.3
Administration/SpeedSearchManager/RunSchedule	Administrative role: grants permission to run SpeedSearch schedules	9.3
Administration/SpeedSearchManager/ManageSettings	Administrative role: grants permission to manage SpeedSearch settings	9.3
Contour/Map/Lead	Contour role: Allows searching for an viewing leads on a map.	9.4
Contour/Map/Opportunity	Contour role: Allows searching for an viewing opportunities on a map.	9.4
Entities/Attachment/Delete	Standard User role: grants permission to delete attachments.	9.1
Entities/JobManager/StartJobService	Administrative role: grants permission to start and stop the Job Service in job Manager.	9.3
Entities/User/LoggedInUsers	Administrative role: grants permission to view logged in users from the Users list view Task Pane.	9.1
Import/History/View	Standard user role: allows access to the Import History view.	9.4
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