



Infor CRM SLX v10.0 Release Notes

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Introduction



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

About This Guide

This document provides instructions for upgrading existing installations from Infor CRM SLX version 9.0 or later to version 10.0.

Version 10.0 will uninstall earlier versions of Infor CRM SLX before installing version 10.0.

If you are upgrading from Infor CRM SLX version 9.0 or later, follow the steps in this guide.

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

If you are upgrading from a version of Infor CRM SLX or Saleslogix prior to version 9.0, you must first upgrade to version 9.0 or later before upgrading to version 10.0. Use the upgrade instructions in the appropriate upgrade documents on the support portal web site: Infor Concierge at <https://conciierge.infor.com/>



DO NOT install this release on any Infor CRM SLX version earlier than 9.0.

Prerequisites

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

1. For additional prerequisite compatibility information for Infor CRM SLX v10.0 is available in the Infor Online Compatibility Matrix (OCM).
2. Log on to the Infor Support Portal web site: <https://conciierge.infor.com/>.
3. Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
Click Help for a video explaining the features of the OCM.



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

Prerequisites	Admin Tools and Servers	Windows Client	Remote Office	Remote Client	Offline Web Client	Web Host
Windows Installer 4.5.1	X		X	X	X	
Microsoft Exception Message Box	X		X	X		
Microsoft .NET Framework 2.0 or 3.5	X		X	X	X	X
Microsoft .NET Framework 4.8	X		X	X	X	X
Microsoft .NET Framework 4.8 Developer Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server Express 2019 RTM (Optional) ¹	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X



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

Related Documentation

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

- Compatibility information for Infor CRM SLX v10.0 is available in the Infor Online Compatibility Matrix (OCM) available in the Infor CRM SLX v 10.0 KB article and from docs.infor.com. See "Prerequisites" on page 2 for instructions.
- The *Developer Tips* online Help contains information for developers, Webmasters, and IS professionals who are customizing the Infor CRM SLX Web Client or creating custom Web applications. This help file contains conceptual overviews, customization scenarios, code samples, and references to help you develop your Web applications. The Developer Tips Help is available from the Application Architect help system.
- The *Infor CRM SLX Back Office Extension Configuration Guide for ION* provides configuration and implementation information for integrating Infor CRM SLX Back Office Extension functionality with Infor ION. This document describes configuration requirements and provides setup instructions. It describes the ION connection points that are used in the integration and provides information about the business events or user actions in Infor CRM SLX that send Business Object Documents (BODs) to ION Connect. This document is available with the product media and from the Infor Support Portal on the Infor Concierge web site: <https://concierge.infor.com/>.
- The *Infor CRM SLX Back Office Extension Customization Guide* provides instructions for customizing the Infor CRM SLX v10.0.x Back Office Extension functionality to integrate with your ERP system when using Infor ION Connect. This document is available with the product media and from the Infor Support Portal web site: <https://concierge.infor.com/>.
- The *LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize the Infor CRM SLX Windows (LAN) Client to meet your specific needs. It is available from the Infor Support Portal web site: <https://concierge.infor.com/>.
- Online Help is available in each Infor CRM SLX application.
- The Infor CRM Web Client online help is available from <https://docs.infor.com/en-us/crm/8.5.x>

Contacting Infor

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

The latest documentation is available from docs.infor.com or in the KB article for your version of Infor CRM SLX. For Infor CRM SLX version 10.0 see KB3652600. For all other versions see KB2289845. We recommend that you check either location periodically for updated documentation.

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

Chapter 1

Upgrade workplan

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

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



- Sync for Exchange 1.0.4 is compatible with Infor CRM SLX 10.0 or later. No other versions of Sync for Exchange are compatible with Infor CRM SLX 10.0. Please install the latest version available after upgrading to Infor CRM SLX 10.0. For more information see KB3658723.
- Sync for Gmail 1.4 is compatible with Infor CRM SLX 10.0 or later. No other versions of Sync for Gmail are compatible with Infor CRM SLX 10.0. Please install the latest version available after upgrading to Infor CRM SLX 10.0. For more information see KB3658722
- Outlook Integration functionality is delivered with Infor CRM Xbar. The Infor CRM Xbar v1.4.3 installation is provided on the 10.0 media.

Preparing to upgrade

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

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

Required for	Task	Description
All	1	<p>Read the Infor CRM SLX v10.0 Release Notes</p> <p>Read all chapters in this document before proceeding. Understanding the content of the release and planning your upgrade are critical.</p> <ul style="list-style-type: none"> ▪ Chapter 1, "Upgrade "Workplan" - contains upgrade tasks explaining how to: <ul style="list-style-type: none"> ▪ Prepare your database ▪ Upgrade the core Infor CRM SLX components ▪ Cut new remote remote databases ▪ Upgrade your clients (Web, Mobile, Network, Offline, Remote) ▪ Enable new features added in version 10.0 ▪ Upgrade Back Office Extension. ▪ Upgrade existing integrations such as Infor CRM Xbar for Microsoft Outlook. ▪ Chapter 2, "What's New in this release" - details the new features, functionality changes, and enhancements in this release. Any change that impacts customizations is identified as a [Breaking Change]. ▪ Chapter 3, "Changes in this release" - details the schema, plugin, and file changes in this release. <p>Before upgrading, ensure that:</p> <ul style="list-style-type: none"> ▪ Your current Infor CRM SLX version is 9.0 or later and Web portals included in your installation are version 9.0 or later and have deployed successfully. ▪ You review the Compatibility spreadsheet to understand the supported platforms, applications, and system requirements for this release. The Infor_CRM_SLX_10.0_Compatibility.xlsx is available in KB3652600.
All	2	<p>Test environment</p> <p>Install this release in a test environment before installing on your production database.</p> <p>Create a test environment to review new features and for use after upgrading your production environment. If your installation includes customizations, you can use the test environment to compare your customizations with your upgraded production environment.</p> <p>Refer to the support portal web site: Infor Concierge at https://conciierge.infor.com/ for more information. Search for "How to set up an Infor CRM SLX test environment" for information on using a copy of your production database in a test environment.</p> <p>Note: Make sure you change your logging paths in the Administrator to access the test environment or errors will occur.</p>
All	3	<p>Admin rights</p> <p>Grant admin rights to the person installing the upgrade.</p> <p>Offline (disconnected) Web Client users can upgrade without admin rights on their machines. Other users require admin rights when installing Infor CRM SLX.</p>

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


Protecting your customizations

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

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

Preparing your Infor CRM database

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

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

Upgrading your core components

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


Required for	Task	Description
Network only using Microsoft Outlook Infor CRM SLX Address Book	16	<p>Install the Web Host and build and deploy SData portal and client</p> <p>Infor CRM SLX implementations that are Windows Client-only (no Web) and use the Infor CRM (SLX) Address Book, Insert VCard, Insert Contact Card, and Insert Library Doc features in Microsoft Outlook must install the Web Host and build and deploy the SData portal and client to continue to use those features in v10.0.</p> <p>Refer to Chapter 5 Installing the Web Components in the <i>Infor CRM Implementation Guide</i> for instructions.</p>
Infor CRM SLX Xbar which includes Outlook Sync	17	<p>Installing Infor CRM SLX Xbar which includes Outlook Sync</p> <p>If your implementation is LAN only, and you will be adding Infor CRM Xbar for Microsoft Outlook to your implementation, you must deploy a SData portal.</p> <p>If your installation is:</p> <ul style="list-style-type: none"> ▪ Windows Network Client only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals. ▪ Windows Remote Client: no extra actions required. The SDataportal is deployed as part of the LAN Remote Client install.
All	18	<p>Upgrade main office computer</p> <p>Upgrade your main office computers using the Administrative Tools and Servers installation. This includes the Administrative Workstation, Synchronization Server, SpeedSearch Server, and Job Server.</p> <p>Note: The installation creates folders and applies permissions necessary for Infor CRM SLX to function. To avoid unexpected results, we recommend contacting Infor CRM SLX Technical Support or your Business Partner before changing default settings on these folders.</p> <p>The Administrative Tools and Servers installation allows you to select one or multiple applications to install on the same computer. The installations remove only the applications with a prior version and then install ONLY the applications for the installation that you selected. For example, if you have the Administrator, Architect, and Infor CRM SLX Client on your Administrative Workstation computer and you run the Administrative Tools and Servers install, only the Administrator and Architect will be removed and reinstalled. To upgrade the Sales Client, you must then run the Network Client install at which point only the Infor CRM SLX Client will be removed and reinstalled.</p> <p>Important:</p> <ul style="list-style-type: none"> ▪ The Job Service is required for Web Client functionality. ▪ If your installation is Windows-only and has been using the SLX Address Book (now rebranded to Infor CRM Address Book) and related features in Microsoft Outlook, complete task number 16 before proceeding with this task. ▪ If your installation includes Remote users or Remote Offices, you must upgrade your Synchronization Server(s). ▪ If your implementation includes Outlook Sync, read task number 17 before proceeding with this task. <p>To upgrade</p> <ol style="list-style-type: none"> 1. Infor CRM SLX media> Server Installation > Required Administrative Tools and Servers. 2. If the Open File - Security Warning dialog appears, click Run. 3. If the installation does not detect the necessary prerequisites, (such as SQL Express) you will be prompted to install them. Installing prerequisites may

Required for	Task	Description
		<p>require your computer to restart.</p> <ul style="list-style-type: none"> ▪ Click Install to continue with the installation. ▪ Click Cancel to exit the Administrative Tools and Servers installation. <p>4. For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM. If a message box offering to install an optional prerequisite (such as Microsoft SQL Server 2019 Express) opens, do one of the following:</p> <ul style="list-style-type: none"> ▪ Click Yes to install the referenced software. ▪ Click No to cancel installation of the prerequisite, but continue to install Infor CRM. <p>5. On the Welcome screen, click Next.</p> <p>6. On the Setup Type screen, select an installation type.</p> <ul style="list-style-type: none"> ▪ Select Complete to install all program features and the Microsoft SQL Server databases. Selecting this option installs Infor CRM SLX using the Local System Account. To set a different user, particularly if SpeedSearch indexes include files located on another computer, select the Custom option. ▪ Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. <ul style="list-style-type: none"> • Saleslogix Server - installs the components that primarily handle logging and licensing for Infor CRM SLX. This is required for all installations. • Administrator - installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Infor CRM licenses. • Architect - installs the component used to customize the Infor CRM Client. • Application Architect - required to configure and customize the Infor CRM SLX Web components and portals. • Job Service - installs the service used for scheduling tasks for immediate or delayed execution. You must install this service if your implementation includes any type of Infor CRM SLX Client because it is required for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel. • Messaging Server - enables communication between Infor CRM service components. This is required for all installations. • Cache Server - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do not install on the SpeedSearch Server, and be sure to install only once per implementation. • SpeedSearch Server - installs the SpeedSearch Service. • Synchronization Server - required if your installation will include remote users or a remote office. • .NET Extensions - install if your Network Client customizers will want to distribute, license, release and deploy Network Client

Required for	Task	Description
		<p>customizations written in the Microsoft .NET Framework.</p> <ul style="list-style-type: none"> • Utilities - multiple applications to aid with customization and database maintenance. <p>7. Click Next.</p> <p>8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:</p> <ul style="list-style-type: none"> ▪ SQL Server sa password - If you have a password set on the sa account on the SQL Server, type the sa password. The installation requires this password to install and attach the Infor CRM SLX databases. ▪ SQL Server sysdba password - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Infor CRM SLX database. ▪ Use Local System Account - Select this option if the local user account has the correct security permissions to install Infor CRM SLX. If you clear this option, set the information for the Infor CRM SLX Service user. ▪ Domain - Type the network domain where you created the Infor Service user. ▪ User Name - Type the name of the Infor Service user (for example, SLXService). ▪ Password and Confirm - Type the Infor Service user's password. ▪ Port Change button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. <p>9. On the remaining screens, click Install and Finish to complete the installation. Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.</p> <p>10. If prompted, restart your computer when the installation completes.</p>
All Web	19	<p>Upgrade the Web Host</p> <p>Note: To upgrade the Cache Server, see task 18: "Upgrade main office computer" installation.</p> <p>To upgrade</p> <ol style="list-style-type: none"> 1. You must log on as the local administrator to install the Web components on each machine. 2. On the Infor CRM SLX Installation screen, click Server Installation. 3. On the Server Installation screen, click Web Host on IIS. Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Installing prerequisites may require your computer to restart.

Required for	Task	Description
		<ul style="list-style-type: none"> ▪ Click Install to allow Infor CRM SLX to install the required components. ▪ Click Cancel to stop the installation. <p>For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM SLX.</p> <ol style="list-style-type: none"> 4. In the Infor CRM SLX Web Host message box, click Yes. 5. On the Welcome screen, click Next. 6. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> ▪ Select Complete to install the Web Host. ▪ Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. 7. If you installed the Cache Server on a computer other than the Web Host, you must manually configure the web.config file to access the Cache Server computer. <ul style="list-style-type: none"> ❓ See the “Configuring the Infor CRM SLX Cache Server” topic in the Application Architect help for details 8. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: <ul style="list-style-type: none"> ▪ Use an existing web site - If you want the installation to use an existing Web site, click this button and select the Web site name. If you created an SData portal or Outlook sync in the Administrative Tools and Servers installation, you can select the existing Saleslogix Web site for the Web components. <p>Note: If the dialog box to select the Web site does not appear, check to see if it opened in the background behind another open window.</p> ▪ Create Web Site – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals. ▪ Enter a Web site name – Type the name of the Web site that will appear in IIS. The default name is Infor CRM SLX ▪ Port – Enter the port number that the Infor CRM SLX Web site will use. Note the port number for future reference. You must use port number 1025 or greater. ▪ Domain – Enter the network domain where you created the WebDLL user. ▪ User Account – Enter the name of the WebDLL user you created. The default value is <i>WebDLL</i>. If you used a different name, type it exactly as you did when you created it. ▪ Password and Confirm Password – Type the WebDLL user’s password. ▪ Configure Saleslogix Database - Clear this check box if you do not want to connect to the database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled.

Required for	Task	Description
		<ul style="list-style-type: none"> • Saleslogix Server – Select or type the name of the computer on which you installed the Saleslogix Server. • Saleslogix Database Alias – Select or enter the name of the connection to the Infor CRM SLX database. • Search for servers on port - Enter a port. By default, this is set to port number <i>1706</i>. • User Name – Enter a Infor CRM SLX user name (such as Admin). • Password – Enter the Saleslogix Server password for the Infor CRM SLX user. <p>9. On the remaining screens, click Install and Finish to complete the installation. Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation.</p> <p>10. If prompted, restart your computer when the installation completes</p>
All	20	<p>(Optional) Upgrade the Network Client</p> <p>If the Infor CRM SLX Network Client is installed on your Administrative Workstation, run the Network Client installation to install the Client application.</p> <p>To upgrade</p> <ol style="list-style-type: none"> 1. Infor CRM SLX Installation browser > Client Installations> Install Network Client. Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation. 2. In the Infor CRM Network Client message box, click Yes. 3. On the Welcome screen, click Next. 4. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> ▪ Click Complete to install the most common components. ▪ Click Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. 5. On the remaining screens, click Install and Finish to complete the installation. Note: The installation process removes prior versions before installing the new applications. During this process, you may see one of the following messages: <ul style="list-style-type: none"> ▪ “Assembly not Found.” This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. ▪ "Error 2753. The File 'slxnetextensionsinstall.exe' is not marked for installation". If this occurs repeat steps 1-5 to re-run the Infor CRM Network Client. 6. If prompted, restart your computer when the installation completes.

Required for	Task	Description
All	21	<p>Start the Administrator</p> <p>On the Start menu, expand Saleslogix, and then click Administrator.</p>
All	22	<p>Apply the Infor CRM SLX v9.0 to v10.0 Upgrade.sxb bundle</p> <p>Use the Administrator to apply the Infor CRM SLX v9.0 to v10.0 Upgrade.sxb bundle.</p> <p> See the “Installing a Bundle” topic in the Administrator Help for instructions.</p> <p>This bundle is located in the Infor CRM SLX media, in the Upgrades folder and includes functionality formerly released in Updates. The bundle contents are outlined in Chapter 3, "Changes in this release".</p>
<p>All Web</p> <p>Not required for:</p> <p>Oracle</p> <p>Windows only environments</p> <p>Windows environments with:</p> <ul style="list-style-type: none"> ▪ Remote Clients ▪ Remote Offices <p>Web environments with:</p> <ul style="list-style-type: none"> ▪ Web Remote Offices ▪ Offline Web Clients 	23	<p>Create Windows Authentication login for SQL Server / IIS Identities for Asynchronous performance improvements</p> <ol style="list-style-type: none"> 1. Open IIS Manager and expand Server, expand Application Pools , and note the Windows user associated with the Identity for the Saleslogix application pool. 2. Open SQL Server Management Studio 3. Expand Server, expand Security, expand Logins. 4. Right-click Logins and click New Login. 5. Select Windows authentication. 6. Click Search to open the Select User or Group dialog box. 7. In the Enter the object name to select box, type the Windows account associated with the Saleslogix application pool click Check Names, and then click OK. 8. In the Select a page section, click User Mapping. 9. In the Users mapped to this login choose the default database , and then click OK. 10. Expand Databases, SalesLogix default database, expand Security. 11. Right-click Users and select a New User. 12. In the User type drop-down list select Windows user. 13. Click the User name, ellipsis button, and use the dialog to select the same user step 7. <ol style="list-style-type: none"> a. In the Enter the object name to select box, type the Windows account associated with the Saleslogix application pool. b. Click Check Names, and then click OK. 14. In the Select a page section, click Owned Schema, and then select sysdba. 15. In the Select a page section, click Membership, and then select db_owner. 16. Click OK.
All Web	24	<p>Copy the Web bundles to a local folder and ensure permissions</p> <ol style="list-style-type: none"> 1. On the install media navigate to the Upgrades folder. 2. Copy the following bundles and paste them in a local folder <ul style="list-style-type: none"> ▪ ICRM SLX v10.0 Web VFS.zip ▪ ICRM SLX v10.0 VFS Actions.zip ▪ INFORCRM-34630 on 10.0.zip 3. Ensure the bundles are not blocked.

Required for	Task	Description
		<ol style="list-style-type: none"> 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. <ol style="list-style-type: none"> 4. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
All Web	25	<p>Install the VFS bundle</p> <p>Install the ICRM SLX v10.0 Web VFS.zip.</p> <p>To install the bundle</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. On the View menu, click Bundle Manager. 3. Click Install. 4. Select File name, navigate to the folder where you saved the bundles in task 24 and select ICRM SLX v10.0 Web VFS.zip 5. On the Select Bundle screen, click Next. 6. Click Finish.
All Web	26	<p>Rebuild the database schema</p> <ul style="list-style-type: none"> ▪ On the Tools menu, click Rebuild Database Schema.
All Web	27	<p>Install the Actions bundle</p> <p>Install the ICRM SLX v10.0 VFS Actions.zip.</p> <p>To install the bundle</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. On the View menu, click Bundle Manager. 3. Click Install. 4. Select File name, navigate to the folder where you saved the bundles in task 24 and select ICRM SLX v10.0 VFS Actions.zip 5. On the Select Bundle screen, click Next. 6. On the Release Plugins dialog box, click OK to release the plugins to Everyone 7. Click Finish.
All Web	28	<p>Install the INFORCRM-34630 on 10.0 bundle</p> <p>Install the INFORCRM-34630 on 10.0.zip .</p> <p>To install the bundle</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. On the View menu, click Bundle Manager. 3. Click Install. 4. Select File name, navigate to the folder where you saved the bundles in task 24 and select INFORCRM-34630 on 10.0.zip

Required for	Task	Description
		<ol style="list-style-type: none"> 5. On the Select Bundle screen, click Next. 6. Click Finish.
All Web	29	<p>Copy the Conversion utility locally</p> <p>To copy</p> <ol style="list-style-type: none"> 1. On the install media navigate to the Extra Files folder. 2. Copy the following files and paste them in C:\Program Files (x86)\Saleslogix <ul style="list-style-type: none"> ▪ ConversionUtility_10.0.exe ▪ ConversionUtility_10.0.exe.config ▪ ConversionUtility_10.0.pdb
All	30	<p>Run the Infor CRM v10.0 Conversion Utility</p> <p>The Conversion Utility is required for all upgrades</p> <p>Note: The Application Architect must be installed on the server where the Conversion Utility is run.</p> <p>The Conversion Utility contains the following important actions:</p> <ul style="list-style-type: none"> ▪ 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. Note: This action should be executed only once. If you ran this action during a previous update, you do not have to select and run this action again. ▪ Isolate integrated content by Logical ID This option is only for rare implementations based on two or more host ERP systems with data defined using a common ERP Accounting Entity. For most implementations this option should not be selected. This is a non-reversible option that extends the internal format of the Infor CRM SLX tracking of unique ID values assigned by the host ERP system to include an internal BackOfficeID value. This option depends upon setting the Isolate Content by Logical ID custom setting equal to True. Note: This action should be executed only once. If you ran this action during a previous update, you do not have to select and run this action again. ▪ 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. <p>The conversion utility also makes the following non-optional changes:</p> <ul style="list-style-type: none"> ▪ 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)

Required for	Task	Description
		<ul style="list-style-type: none"> ▪ 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: <ul style="list-style-type: none"> ▪ 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. ▪ Creates a LeadHistory record for each instance of a lead. ▪ Updates the CampaignTarget.CampaignStageId based on a lookup of CampaignStage.Description equal to CampaignTarget.Stage and where CampaignTarget.CampaignId is equal to the CampaignStageId. If found, the CampaignStageId for the CampaignTarget table is updated. ▪ Updates the TargetResponse.CampaignStageId based on a lookup of CampaignStage.Description equal to TargetResponse.Stage and where CampaignTarget.CampaignId is equal to the CampaignStageId. If found, the CampaignStageId for the TargetResponse table is updated ▪ Converts legacy pricing data to a new discount model by normalizing discount/adjustment fields and inverting their polarity (changing signs from positive to negative). <p>To run the conversion utility</p> <ol style="list-style-type: none"> 1. On the Administrative Workstation, browse to the ConversionUtility.config file. By default, this is in \Program Files (x86)\Saleslogix. 2. Open ConversionUtility_10.0.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="&quot;PORT=1706;LOG=ON; CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1; SVRCERT=12345;ACTIVITYSECURITY=OFF; TIMEZONE=NONE&quot;"/>

Required for	Task	Description
		<p>Change the value to: <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabase Data Source=localhost;Extended Properties=&quot;PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF; TIMEZONE=NONE&quot;"/></p> <ol style="list-style-type: none"> 4. Double click the ConversionUtility_10.0.exe application. 5. In the Conversion Utility interface, clear any actions you do not want to run and click Update.
All Web	31	<p>Run the SQLIndexScript.txt to convert non-clustered indexes to clustered primary key constraints</p> <p>To install the bundle</p> <ol style="list-style-type: none"> 1. On the install media navigate to the Extra Files folder. 2. Open the SQLIndexScript.txt file. 3. Open SQL Management Studio. 4. Expand Databases. 5. Select your database. 6. Right-click and select New Query. 7. Copy the contents of SQLIndexScript.txt to the new query window 8. Click Execute. 9. Review the results. <p>Notes:</p> <ul style="list-style-type: none"> ▪ If any indexes/primary key constraints fail to be created, a clustered primary key constraint may already exist or there may be duplicate data that the index is expecting to be unique. ▪ Any failures will not prevent you from using the application.
<p>Oracle</p> <p>Windows only environments</p> <p>Windows environments with:</p> <ul style="list-style-type: none"> ▪ Remote Clients ▪ Remote Offices <p>Web environments with:</p> <ul style="list-style-type: none"> ▪ Web Remote Offices 	32	<p>Revert Asynchronous session state to legacy session state provider</p> <p>To disable asynchronous session state</p> <ol style="list-style-type: none"> 1. In Application Architect, open the SlxClient web.config file. In Project Explorer, expand Portal Manager, expand SlxClient, expand Support Files, and then double-click web.config. 2. Under system.web comment out the <sessionState> section. <pre><sessionState cookieless="false" regenerateExpiredSessionId="true" mode="Custom" customProvider="SqlSessionStateProviderAsync"> <providers> <add name="SqlSessionStateProviderAsync" connectionStringName="DefaultConnection" repositoryType="SqlServer" type="Microsoft.AspNet.SessionState.SqlSessionStateProviderAsync, Microsoft.AspNet.SessionState.SqlSessionStateProviderAsync, Version=1.1.0.0, Culture=neutral"/></pre>

Required for	Task	Description
<ul style="list-style-type: none"> ▪ Offline Web Clients 		<pre></providers> </sessionState></pre> <ol style="list-style-type: none"> 3. Under httpModules remove the comment markup from this line <pre><add name="Session" type="System.Web.SessionState.SessionStateModule" /></pre> 4. Under modules comment out these two lines: <pre><remove name="Session" /> <add name="Session" type="Microsoft.AspNet.SessionState.SessionStateModuleAsyn c, Microsoft.AspNet.SessionState.SessionStateModule, Version=1.1.0.0, Culture=neutral" /></pre> 5. Click Save. 6. Repeat steps 1-5 for the SData portal web.config file. In Project Explorer, expand Portal Manager, expand SData, expand Support Files, and then double-click web.config
All Mobile	33	<p>Install the Mobile VFS bundle</p> <p>Install the ICRM SLX Mobile v4.3.0 for 8.5 and later VFS.zip.</p> <p>To install the bundle</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. On the View menu, click Bundle Manager. 3. Click Install. 4. Select File name, navigate to the folder where you saved the bundles in task 24 and select ICRM SLX Mobile v4.3.0 for 8.5 and later VFS.zip 5. On the Select Bundle screen, click Next. 6. Click Finish.
All Mobile	34	<p>Verifying the Port and App Pool are set</p> <p>Failure to set the Port and App Pool settings for your Mobile portal can cause the site to function as a virtual directory instead of an application. To prevent this, verify that the Port and App Pool are set before deploying the portal.</p> <p>To verify the Port and App Pool</p> <ol style="list-style-type: none"> 1. In the Application Architect View menu, click Deployment Explorer. 2. Expand Deployments, and then double-click the Mobile Portal. If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click OK. 3. In the Deployment Targets tree view, click IIS. The IIS Target Settings appear. 4. In the Port box, ensure that the port number for your Web Host server displays. 5. It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333. 6. In the App Pool box, ensure that the name of the application pool for your Web site displays. This name corresponds to the associated application pool for your Web site. For example, if you used the default Infor CRM Web site, the App Pool is Saleslogix.

Required for	Task	Description
		For more information about setting the Port and App Pools, see <i>Infor CRM Implementation Guide</i> .
All Mobile	35	<p>Enable multi-currency on the Mobile Client</p> <p>If your implementation includes Multi-currency, and you have users on the Mobile Client, you must complete the steps in this section.</p> <p>Multi-currency is disabled by default. To enable Multi-currency, you must copy a setting from the products/argossaleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal.</p> <p>If you make your edit in the products/argossaleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.</p> <p>To enable multi-currency on the Mobile Client</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. Open the Project Explorer and expand the VFS folder. 3. Expand the Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration. 4. Double-click production.js. 5. Locate @property {Boolean} enableMultiCurrency. 6. Remove the comment tag (//) and change the setting from 'false' to true. This must also be configured properly on the SData server. 7. In the Application Architect toolbar, click the Save All icon.
All Mobile	36	<p>Changing the warehouse mode in the Mobile Client</p> <p>Available to Promise enables users to see if there is stock on hand. If your implementation includes an integration with a back office that uses a specific warehouse location for the</p> <p>Available to Promise feature, you can enable users to check each warehouse inventory manually. Warehouse mode is disabled by default. To enable Warehouse mode, you must copy a setting from the products/argos-saleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal.</p> <p>If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.</p> <p>To change the warehouse mode</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. Open the Project Explorer and expand the VFS folder. 3. Expand the Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration. 4. Double-click production.js. 5. Locate "warehouseDiscovery". 6. Remove the comment tag (//) and change the setting from 'auto' to manual.

Required for	Task	Description
		7. In the Application Architect toolbar, click the Save All icon.
All Mobile	37	<p>Enable Offline Support in the Mobile Client</p> <p>Offline support allows read-only access to select records and entities when a user's device is offline or loses connectivity.</p> <p>Offline support is disabled by default. To enable offline support, you must edit the products/argossaleslogix/ configuration/production.js file before deploying the portal.</p> <p>If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.</p> <p>To enable offline support</p> <ol style="list-style-type: none"> 1. Open the Application Architect. 2. Open the Project Explorer and expand the VFS folder. 3. Expand the Portal Manager, Slx Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration. 4. Double-click production.js. 5. Locate "enableOfflineSupport." 6. Remove the comment tag (//) and change the setting from 'false' to true. 7. In the Application Architect toolbar, click the Save All icon.
All web	38	<p>Build and deploy the portals</p> <p>You must verify the build path prior to building.</p> <p>Note: This step is strongly recommended for customized environments to establish a functioning Web Client before adding customizations.</p> <p>To build and deploy</p> <ol style="list-style-type: none"> 1. In the Application Architect, on the Tools menu, click Build Settings. 2. In the Build Search Path, verify that the path is set to: %BASEBUILDPATH%\assemblies;%BASEBUILDPATH%\interfaces\bin; %BASEBUILDPATH%\forminterfaces\bin 3. If you needed to edit the path, you must also clear the output folders. <ul style="list-style-type: none"> ▪ On the Build menu, click Clean Build Folders. 4. On the Build menu, click Build Web Platform. 5. When the build has completed, on the View menu, click the Deployment Explorer. 6. Expand Deployments and double-click Core Portals . 7. Click the Deploy All button. <p>Note: "Be sure to deploy the Mobile portal if your installation includes the Infor CRM Mobile Client.</p>
All	39	<p>Reset IIS</p> <ol style="list-style-type: none"> 1. Close the Application Architect. 2. Stop and restart all Infor CRM SLX services. 3. Reset IIS.
Web - Optional	40	Enable HTTP Compression


Required for	Task	Description
		<p>If your Web site(s) will use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.</p> <p>You must be a member of the Administrators group on the local computer to enable compression.</p> <p>Enabling dynamic compression will provide significantly smaller files over the network. In addition, there are a number of configuration elements that may be modified to provide more benefits. You may need to try different settings to achieve optimum results.</p> <p>The following information can be used as a guide to implement compression in your Infor CRM implementation. To help evaluate and test your specific compression settings, you may want to use a third-party HTTP compression debugging tool.</p> <p>To enable</p> <ol style="list-style-type: none"> 1. Open IIS Manager, and select your Infor CRM SLX Web site. 2. Under IIS, double-click Compression. 3. Select the Enable dynamic content compression check box. 4. If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box. 5. In the Actions pane, click Apply. 6. If necessary, modify the ApplicationHost.config file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config. IMPORTANT: Use the 64 bit version of a text editor (e.g. Notepad.exe) when editing ApplicationHost.config; otherwise, when using a 32 bit version of a text editor the file save will be redirected to %SystemRoot%\SysWow64\inetsrv\config\applicationHost.config and the compression settings will not take effect. The following command line can be used to edit the applicationHost.config file correctly: "%WinDir%\Notepad.exe" "%SystemRoot%\System32\inetsrv\config\applicationHost.config" <p>Note: See the Microsoft IIS Web site at https://www.iis.net/ConfigReference for documentation regarding the settings below</p> <p>Example Configuration Settings:</p> <pre><httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files" maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false" > <scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll" dynamicCompressionLevel="10"</pre>


Required for	Task	Description
		<pre> <staticTypes> <add mimeType="text/*" enabled="true" /> <add mimeType="message/*" enabled="true" /> <add mimeType="application/*" enabled="true" /> <add mimeType="*/*" enabled="false" /> </staticTypes> <dynamicTypes> <add mimeType="text/*" enabled="true" /> <add mimeType="message/*" enabled="true" /> <add mimeType="application/*" enabled="true" /> <add mimeType="*/*" enabled="false" /> </dynamicTypes> </httpCompression> </Quote> </pre> <p>The following script will enable both static and dynamic compression based on the Infor CRM Implementation Guide recommendations:</p> <pre> REM staticTypes REM Enable static compression %windir%\System32\inetsrv\appcmd set config - section:system.webServer/urlCompression /doStaticCompression:"True" /commit:apphost REM Clear the staticTypes section %windir%\System32\inetsrv\appcmd clear config - section:system.webServer/httpCompression /"staticTypes" /commit:apphost REM <add mimeType="text/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes. [mimeType='text/*',enabled='True']" /commit:apphost REM <add mimeType="message/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes. [mimeType='message/*',enabled='True']" /commit:apphost REM <add mimeType="application/*" enabled="true" /> %windir%\System32\inetsrv\appcmd set config - section:system.webServer/httpCompression /+"staticTypes. [mimeType='application/*',enabled='True']" /commit:apphost </pre> <p>7. Save your changes.</p>
	41	<p>Next Steps:</p> <p>If your installation includes customizations proceed to the next section "Re-applying your customizations":</p> <ul style="list-style-type: none"> ▪ Network Client, proceed to task number 42. ▪ Web Client, proceed to task number 43. ▪ Mobile Client, proceed to task number <p>If your installation does not include customizations, you may proceed to one of the following the sections :</p> <ul style="list-style-type: none"> ▪ If your implementation includes remote offices or remote users, proceed to

Required for	Task	Description
		<p>"Upgrading synchronization" on page 25.</p> <ul style="list-style-type: none"> ▪ If your implementation does not include remote offices or remote users, proceed to "Upgrading Web Clients" on page 26.

Re-applying your customizations

These tasks detail merging your preserved customizations with the new changes provided in the Infor CRM v10.0 upgrade. If your installation does not include customizations to the Network Client, Web Client or Mobile portal, you can safely omit this section and continue to the next section, ["Upgrading synchronization" on page 25.](#)

Required for	Task	Description
Customized Network	42	<p>Apply Network Client Customizations</p> <p>Apply the changes listed in Chapter 3, "Changes in this release" on page 79. You can use one of the following strategies:</p> <ul style="list-style-type: none"> ▪ Add your customizations to the Infor CRM SLX plugins (recommended). ▪ Add the Infor CRM SLX changes to your custom plugins. <p>After applying plugin changes, release the appropriate plugins using Architect.</p> <p> See the "Release a Plugin for Use" topic in the Architect Help for information on releasing plugins.</p>
Customized Web	43	<p>Merge Web Client Customizations</p> <p>Note: If you have not customized your Web implementation, disregard this task and proceed to task , "Merge Mobile Customizations" .</p> <p>Use the Application Architect to merge or discard differences between custom and core forms.</p> <ol style="list-style-type: none"> 1. In Application Architect , on the Tools menu, click Manage Customizations. 2. Filter the list by Out of Sync Equal to True. 3. Use the first two columns to perform one of the following actions for each file. <ul style="list-style-type: none"> ▪ Merge – Opens the specified differencing utility and allows you to view and resolve the differences between the two file versions. Note: You must first set the Differencing Tool . On the Tools menu, click Set Differencing Tool opens the Set Differencing Utility. ▪ Ignore – Acknowledges the difference and will exclude this file from being flagged as out of sync going forward. 4. Repeat for each out of sync file. 5. When finished close the dialog box.
Customized Web	44	<p>Review Breaking Changes</p> <p>If you have custom code, review the list of breaking changes to the Infor CRM SLX API and change references to classes and members in your custom code as appropriate. Breaking code changes are identified in Chapter 3, "Changes in this release" on page 79.</p>

Required for	Task	Description
Customized Mobile	45	<p>Merge Mobile Customizations</p> <p>Recreate your Mobile customizations by merging in the customizations you recorded in task 5.</p>
Customized Web	46	<p>Build and Deploy Web Portals</p> <p>Use the Application Architect to build and deploy the appropriate Web portal(s). Use the Rebuild Web Platform option on the Build menu when upgrading existing portals.</p> <p> See the “Rebuilding the Web Platform” and “Deploying Portals” topics in the Application Architect Help for instructions.</p> <p>Offline Web Clients must be deployed using the Virtual File System (VFS). Deployments created from a local file system are not supported and will not function correctly.</p>

Upgrading synchronization

Required for	Task	Description
Remotes	47	<p>Upgrade Synchronization Server</p> <p>If you did not upgrade the Synchronization Server(s) in task 18, do so now.</p>
All	48	<p>Restart the Sync Service(s).</p> <p>Restart the Sync Service for each Sync Server.</p>

Upgrading Clients and Remote Offices

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

Upgrading Web Clients

Required for	Task	Description
Web Client	49	Instruct Users to Sign in to the Web Client If necessary, send the Web Client URL to users through email. Your users can click the URL or type it into a compatible browser on a desktop computer. Instruct users to clear the browser's cache. Users should refer to the browser's instructions for clearing the cache. Instruct Web Client users to sign in to the updated Web Client portal. No additional tasks are required. if you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see " Upgrading Infor CRM SLX Xbar for Microsoft Outlook " on page 38 .

Upgrading Network Clients

Required for	Task	Description
Network Client	50	<p>Install the Network Client</p> <p>Run the Infor CRM Network Client installation on each of your Network user's computers.</p> <ol style="list-style-type: none"> Infor CRM SLX Installation browser > Client Installations> Install Network Client. Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Infor to install the required components or Cancel to stop the installation. In the Infor CRM Network Client message box, click Yes. On the Welcome screen, click Next. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> Click Complete to install the most common components. Click Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. On the remaining screens, click Install and Finish to complete the installation. Note: The installation process removes prior versions before installing the new applications. During this process, you may see one of the following messages: <ul style="list-style-type: none"> "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. "Error 2753. The File 'slxnetextensionsinstall.exe' is not marked for installation". If this occurs repeat steps 1-5 to re-run the Infor CRM Network Client. If prompted, restart your computer when the installation completes. <p>If you are upgrading an installation that included Infor CRM SLX Xbar for Microsoft Outlook, see "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38.</p>

Upgrading Mobile Clients

Required for	Task	Description
Mobile Client	51	<p>Send Mobile URL to Users</p> <p>If necessary, send the Mobile Portal URL to Users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.</p> <p>For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile.</p> <p>The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.</p>

Upgrading Remote Users and Offices

Required for	Task	Description
Remote Clients and Remote Offices	52	<p>ASPStateTempSessions table is in RESYNCTABLEDEFS but is not in the database</p> <p>For Windows only Remote Clients and Remote Office Delete ASPStateTempSessions from Resynctabledefs</p> <ol style="list-style-type: none"> 1. Open SQL Management Studio. 2. Expand Databases. 3. Select your database. 4. Right-click, select New Query and add <pre>DELETE FROM SYSDBA.RESYNCTABLEDEFS WHERE TABLENAME = 'ASPStateTempSessions'</pre> 5. Click Execute. <p>For Web only and Windows and Web environments</p> <p>The ASPStateSessions table is created once someone signs in to the 10.0 version of the Infor CRM SLXWeb Client.</p>
Remote Users and Remote Offices	53	<p>Create a Remote User or Remote Office Database</p> <p>In Infor CRM v10.0, you must create new Remote databases. Create these databases using a Microsoft SQL Server Express instance or the SQL Host Server.</p> <p>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.</p> <p>When you install the Remote Client and use the Infor CRM media to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.</p> <p>However, if you install SQL Express using a standalone install prior to installing Infor CRM then you must ensure that the collation is set correctly as per the Host Database, otherwise where the Windows System Locale is anything other than English (US), SQL Express will use the Windows System Locale settings to determine your collation and it will be incorrect.</p>

Required for	Task	Description
		<p>To create a remote database</p> <ol style="list-style-type: none"> 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: <ul style="list-style-type: none"> ▪ Click Create Remote User Databases. ▪ Click Create Remote Office Databases. 2. In the Create Databases dialog box, do one of the following: <ul style="list-style-type: none"> ▪ 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 <i>Infor CRM SLX Implementation Guide</i>. 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: <ul style="list-style-type: none"> ▪ 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. <p>A test is performed to ensure the settings are configured and that the database can be created in the chosen location.</p> <p>The database is created with the file name SLX_userid_dat.sxd.</p> <p>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.</p>

Required for	Task	Description
		<p>Task 53 - continued</p> <ol style="list-style-type: none"> 5. Click OK to confirm successful completion. 6. Transfer the database to the appropriate computer. <ul style="list-style-type: none"> ▪ If the computer is connected to the network, create a folder on the Administrative Workstation and copy the database to the folder. Share this folder so that the Remote (User or Office) computer has access to it. ▪ If the Remote is not connected to the network, copy the database to the user's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote user, and instruct the user to copy it to his or her computer and unzip it.
Remote Office	54	<p>Upgrade the Remote Office</p> <p>Upgrade the Remote Office by running the Remote Office installation package.</p> <p>To install</p> <ol style="list-style-type: none"> 1. On the Infor CRM SLX Installation screen, click Server Installation. 2. On the Server Installation screen, click Remote Office Server. 3. On the Welcome screen, click Next. 4. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> ▪ Select Complete to install all components on this computer. ▪ Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. 5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens: <ul style="list-style-type: none"> ▪ Use Local System Account - Select this option if the local user account has the correct security permissions to install Infor CRM SLX. ▪ Domain - Type the network domain where you created the Infor CRM Service user. ▪ User Name - Type the name of the Infor CRM SLX Service user (for example, SLXService). ▪ Password and Confirm - Type the Infor CRM SLX Service user's password. ▪ Port Change button - Changes the port number used for communication between the Clients and Infor CRM Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port. ▪ Configure IIS for the Web Server - Select this check box if your installation includes the Infor CRM Client and/or SData portals. This makes necessary modifications to IIS. 6. On the remaining screens, click Install and Finish to complete the installation.
Remote Users	55	<p>Deploy the SData portal to Remote Client users.</p> <p>In version 10.0, Infor CRM SLX Remote Network Client users require an SData portal to enable support for such features as Infor CRM SLX Xbar for Microsoft Outlook. Use the Application Architect to deploy this portal to the appropriate users.</p>


Required for	Task	Description
		<p>To deploy</p> <ol style="list-style-type: none"> 1. On the Application Architect View menu, click Deployment Explorer. 2. In the Deployments tree view, double-click Windows Remote Clients. 3. In the Deployment Targets pane, click Remote Users. The Remote User Target Settings appear. 4. In the Remote User Target Settings pane, click Add. 5. In the Select Remote User(s) dialog box, select the names of the users who need to access the SData portal. 6. Click OK. 7. Ensure the Deploy Portal check box is selected. This indicates the portal is active and should be deployed. 8. Click Save. 9. Click Deploy. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.
Offline Web Client	56	<p>Deploy Web portals to Offline Web Client users.</p> <p>Use the Application Architect to deploy the Infor CRM Web portals.</p> <p>The Web Portals are:</p> <ul style="list-style-type: none"> ▪ SixClient ▪ SData ▪ SixJob Service <p>To deploy</p> <ol style="list-style-type: none"> 1. On the Application Architect View menu, click Deployment Explorer. 2. In the Deployments tree view, double-click Remote Sales Client. 3. In the Deployment Targets pane, click Remote Users. The Remote User Target Settings appear. 4. In the Remote User Target Settings pane, click Add. 5. In the Select Remote User(s) dialog box, select the remote users who will receive the Offline Web Client deployment. 6. Click OK. 7. On the SixClient tab: <ol style="list-style-type: none"> a. In the Virtual Directory box, type the alias name for the virtual directory. By default, the Virtual Directory is SixClient. b. In the Port box, type the port number for the Web site. The Infor CRM Web Server requires its own port for each portal instance. The port for each portal must be unique. c. Ensure the Deploy Portal check box is selected. This indicates the portal is active and should be deployed. 8. Click Save. 9. Click Deploy. The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register


Required for	Task	Description
		the site with a personal server instance.
Remote Offices	57	<p>Deploying the Web Portals for the Remote Office</p> <p>Remote Offices can support both Windows Network Client users and Web Client users. Each type of user requires that you use the Application Architect installed at the main office to deploy the relevant portal(s).</p> <p>For the Web Client user, the required portals are:</p> <ul style="list-style-type: none"> ▪ SlxClient ▪ SData ▪ SlxJob Service <p>For the Windows Network Client, the required portal is:</p> <ul style="list-style-type: none"> ▪ SData <p>To deploy portals for the Web Client user</p> <ol style="list-style-type: none"> 1. On the Application Architect View menu, click Deployment Explorer. 2. In the Deployments tree view, double-click Remote Sales Client. 3. In the Deployment Targets tree view, click Remote Office(s). 4. The Remote Office Target Settings appear. <ol style="list-style-type: none"> a. In the Server box, type the name of your Web Host server. If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server. b. Ensure the Deploy Target check box is selected. This indicates the target is active and should be deployed. c. In the Port box, type the port number for your Web Host server. It must match the port for the Web site. d. In the App Pool box, type the name of the application pool for your Web site. For example, if you used the <i>Saleslogix</i> Web site, the App Pool is <i>Saleslogix</i>. 5. In the Company Name list, select the Remote Office(s) to which you want to deploy the Web Client. 6. Select the tab for the SData portal. <ol style="list-style-type: none"> a. In the Virtual Directory box, type the alias name for the virtual directory. b. In the Sub Directory box, type the folder name where all portal files will be copied under the target's base directory. c. Ensure the Deploy Portal check box is selected. This indicates the portal is active and should be deployed. <p>Note: When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.</p> 7. Click Save. 8. Do one of the following: <ol style="list-style-type: none"> a. Click Deploy to deploy portals individually. b. Click Deploy All to deploy all portals in the Remote Office.

Required for	Task	Description
		<p>Task 57 - continued</p> <p>The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, the portals are deployed to the remote.</p>
All Remotes	58	<p>Running a Synchronization Cycle</p> <p>After deploying the Web site, a synchronization cycle must run to deploy the portal to remotes. Synchronization is set to run automatically every 30 minutes. You can run a manual synchronization cycle immediately or wait for an automated cycle to complete.</p>
Web Remotes	59	<p>Installing the Offline Web Client</p> <p>Users do not need administrator rights to install or run the Offline Web Client. However, the Offline Web Client installation installs third-party prerequisites if they are not detected on the user's computer. Administrator rights are required to install the following:</p> <p>Note: Internet access to Microsoft.com is required to install some of these options.</p> <ul style="list-style-type: none"> ▪ Windows Installer 4.5.1 ▪ Microsoft SQL Express 2022 ▪ .Net Framework 4.8 ▪ .Net Framework 4.8 Developer Pack ▪ Microsoft SQL 2005 Backwards Compatibility ▪ .Net AJAX Extensions <p>You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Infor CRM SLX installation.</p> <p>Installing Without Administrator Rights</p> <p>To install the Offline Web Client without administrator rights, ensure you have installed all the prerequisites listed in the previous section. If the Offline Web Client installation does not detect the necessary prerequisites and the user running the installation does not have administrator rights, the Offline Web Client installation will not complete.</p> <p>Installing With Administrator Rights</p> <p>To install the Offline Web Client and the required prerequisites, you must grant the user administrator rights for the computer on which you are installing Infor CRM SLX. See your Microsoft documentation for instructions on granting administrator rights using one of the following options:</p> <ul style="list-style-type: none"> ▪ Add each user to the local machine's Admin group for the duration of the implementation. ▪ Use a domain user account that is a member of the domain admin group for the duration of the implementation. <p>To install</p> <ol style="list-style-type: none"> 1. On the Infor CRM SLX Installation screen, click Client Installations. 2. On the Client Installation screen, click Install Offline Web Client. 3. On the Welcome screens, read the information and then click Next. 4. On the remaining screens, click Install and Finish to complete the installation

Required for	Task	Description
Remote Users and Offices	60	<p>Distribute Client Installations to your Remote users and Offices</p> <p>You can distribute a copy of the Infor CRM SLX media</p>
Remotes	61	<p>Instruct Remote users to upgrade the Infor CRM Client.</p> <p>Remotes should upgrade using the Remote Client installation on the Infor CRM SLX media.</p> <p>To upgrade</p> <ol style="list-style-type: none"> In the Install browser (Setup.exe) click Client Installations> Install Remote Client. <ul style="list-style-type: none"> Note: If the installation does not detect the necessary prerequisites you will be prompted to install them. Installing prerequisites may require your computer to restart. <ul style="list-style-type: none"> Click Install to allow Infor CRM SLX to install the required components Click Cancel to stop the installation. <p>For some prerequisites, you may have the option to bypass their installation but still continue installing Infor CRM.</p> On the Welcome screen, read the information then click Next. On the Setup Type screen, select an installation type, and then click Next. <ul style="list-style-type: none"> Select Complete to install all components on this computer. Select Custom to install only certain components or to change the installation location. Use the Custom Setup screen to enable or disable items for installation. On the remaining screens, click Install and Finish to complete the installation. <ul style="list-style-type: none"> Note: The installation process removes prior versions before installing the new applications. During this process, you may see the message "Assembly not Found." This is triggered between removing and replacing a service and does not indicate a problem with your installation. Click OK to continue the installation. If prompted, restart your computer when the installation completes. <p>Note: If you are upgrading an installation that included Infor CRM Xbar for Microsoft Outlook, see "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38</p>

Required for	Task	Description
Remote Users and offices, Offline Web Client users	62	<p>Install the Remote Database</p> <p>Before logging on to the Remote Client, you must attach the Remote database using the Remote Database Setup dialog box.</p> <p>The connection contains the following values:</p> <ul style="list-style-type: none"> ▪ The Database Name is set to SLXRemote. ▪ The Server Name is set to the name of the Remote user's computer. ▪ The User name is set to sa. ▪ The sysdba password is set to Ma\$t3rk3y. ▪ When attaching the remote database, if the sysdba user does not exist, the user is created with a password set to Ma\$t3rk3y. If the sysdba user already exists in the remote Microsoft SQL instance, then the sysdba user's password remains unchanged. However, the database installation sets the sysdba password in the Connection Manager to Ma\$t3rk3y. Therefore, if the sysdba password on the remote database is set to a value other than Ma\$t3rk3y, the Remote user must open the Connection Manager and change the sysdba password to the value in their database.
		<p>Task 62 - continued</p> <p>To install</p> <ol style="list-style-type: none"> 1. Browse to the location of the Remote user database. <ul style="list-style-type: none"> ▪ For Remote Users and Offline Web Client users, the database file name is <i>SLX_userid_dat.sxd</i>. ▪ For Remote Offices, the databases the database file name is <i>SLX_sitecode_dat.sxd</i> 2. Double-click the Remote database. 3. In the Remote Database Setup dialog box, click OK. 4. In the Infor CRM Attach Remote dialog box click OK to confirm a successful installation. <p>If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the 'Select the name of the SQL instance to use' dialog box.</p> <p>The Attach Remote utility assumes the sa password is SLXMa\$t3r. If you did not install Microsoft SQL Express using the Infor CRM installation, you may have to change the sa password in the Remote Database Setup dialog box before the database can be successfully attached.</p>
Remote Users and offices, Offline Web Client users	63	<p>Run a Synchronization Cycle</p> <p>Users must run a synchronization cycle before they can log on to the Web Client. The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.</p> <p>To run</p> <ol style="list-style-type: none"> 1. On the Start menu, expand Saleslogix, and then click Synchronization Client. 2. Log on using your Infor CRM user name and password. 3. Click Sync Now.
Web Remotes	64	Signing in to the Web Client

Required for	Task	Description
		<p>After running a synchronization cycle to set up the portal, users can sign in to the Web Client using the system tray icon.</p> <p>First, instruct users to clear the browser's cache. Users should refer to the browser's instructions for clearing the cache.</p> <p>To log on</p> <ol style="list-style-type: none"> 1. Right-click the system tray icon, and then click Open Site. 2. Log on using the standard Web Client log on screen
Remote Office	65	<p>Populate views for the Remote Office Web Client</p> <p>In a Remote Office environment, sign into the Infor CRM LAN Client once before signing into the Infor CRM Web Client. This allows some views in the Web Client database to populate correctly. If you do not sign into the LAN Client before signing into the Web Client, an error will appear when attempting to open the Detail dialog caused by the missing database views.</p>
Remote User	66	<p>Start the Remote Client</p> <p>After installation, the user who installed Infor CRM must log on to the Client computer(s) for the first time and launch various applications. This process creates the necessary registry entries for each application and creates a connection to the Remote database.</p> <p>If the standard user does not have rights to install Infor CRM, an admin user must start the Client application. If the standard user has installation rights, he/she can simply log on and begin using Infor CRM. The Infor CRM Client must write to restricted areas of the registry. Therefore, once an admin user has logged on to the Client, a standard user can read from the registry's restricted area.</p> <p>To start</p> <ol style="list-style-type: none"> 1. On the Start menu, expand Saleslogix, and then click Infor CRM Client. 2. In the Please log on dialog box: <ol style="list-style-type: none"> a. Type your Username and Password. b. In the Log on to box, ensure the correct database connection name displays (for example, SLXRemote). c. Click OK. 3. (Optional) Configure synchronization of the Remote user's database to run automatically when the user is logged on to the main office database. <p> For more information on automated synchronization, see the "Infor CRM Synchronization Client" topic in the Infor CRM Client Help.</p>
	67	<p>Creating a SpeedSearch Schedule</p> <p>You can set a schedule on the Remote user's computer to determine when SpeedSearch indexes are run. If a schedule is not set and your Host updates indexes when the Remote computer is turned off, the indexes on the Remote are updated when the user starts their computer. This update may delay the user as he/she cannot immediately start their work.</p> <p>To create</p> <ol style="list-style-type: none"> 1. On the Infor CRM Client Tools menu, click SpeedSearch Options. 2. In the Index list, select the index(es) for which you want to set a schedule. 3. In the Full Update section, select the date and time you want the index(es) to complete a full update.

Required for	Task	Description
		<p>4. In the Daily Update section, select how you want to schedule daily incremental updates.</p> <ul style="list-style-type: none"> ▪ When Infor CRM Opens - All enabled indexes are updated when you open the Infor CRM Client. ▪ When Infor CRM Closes - All enabled indexes are updated when you close the Infor CRM Client. ▪ Once at - Select the time of day that you want to update all enabled indexes. ▪ Repeat Every - Select or type how often you want all enabled indexes to be updated. <p>5. Click OK.</p>
Remotes	68	<p>Instruct Remote users and Remote Offices to log on to the Synchronization Client and sync immediately after upgrading.</p> <p>Ensure Remote users and Offices enable “Apply Changes” during the synchronization cycle.</p>
Remotes	69	<p>Cycle the Synchronization Server</p> <p>Cycle your Synchronization Server(s) so changes are sent to remotes. Use Custom Sync since it is not necessary to run subscription.</p> <p> See the “Creating a Custom Sync Cycle” topic in the Administrator Help for more information.</p>

Additional Web Client upgrade tasks

Required for	Task	Description
Web with ION Workflow enabled	70	<p>Review Active ION Workflows</p> <p>Review which ION Workflows should be marked as Active.</p> <p>To review the Active state of ION Workflow</p> <ol style="list-style-type: none"> 1. In the Web Client, Administration, Integrations, select ION Workflow. 2. Click the Workflows tab. 3. Uncheck the Active checkbox for any workflow that you do not want as active.
All Web	71	<p>Instruct Web Client and Offline Web Client users to download Mail Merge for Microsoft Word</p> <p>Mail Merge for Microsoft Word allows users to manage mail merge templates and complete mail merges in Microsoft Word.</p> <p>Note: Outlook Integration (Send to CRM and Record to History) functionality is delivered with Xbar. See "Upgrading Infor CRM SLX Xbar for Microsoft Outlook" on page 38.</p> <p>To install and configure</p> <ol style="list-style-type: none"> 1. Sign in to the Infor CRM Web Client. <ul style="list-style-type: none"> ▪ For Web Client users, open the Infor CRM SLX Web site. ▪ For Offline Web Client users, in your System Tray, right-click Personal Web Server, point to SixClient, and click Open Site.

Required for	Task	Description
		<ol style="list-style-type: none"> Expand the Tools menu and then click Options. Click the General tab, and then click Install Mail Merge for Microsoft Word. Follow the installation instructions on screen. You must be a Power User or Admin user to install Outlook Integration.
All Web	72	<p>Clear the web browser's cache</p> <p>Before logging into the upgraded Web Client, instruct users to clear the cache of the web browser.</p> <p>For detailed steps, please refer to your browser's help.</p>
Web Client (optional) Customer Portal (optional)	73	<p>Re-configure Password Self-Service</p> <p>Password self-service is available for the Infor CRM Web Client and for the Customer Portal. This feature allows users to reset their own passwords and request their usernames. If your installation included Password Self-service and you want to continue to use it, you must reconfigure it now.</p> <p>The default setting at installation is off. To enable Password self-service you must edit the appSettings.config file.</p> <p>When editing the appSettings.config file, be sure to do so in the VFS. If you edit in in the file system, your changes may be overwritten if the appSetting.config file is redeployed.</p> <p>To turn password self-service on</p> <ol style="list-style-type: none"> Open the Application Architect and expand the Project Explorer. Expand Portal Manager>SlxClient>Support Files, and then double-click appSettings.config. Scroll through the file to locate "Defines the settings for sending email". Edit using the instructions in the appSettings.config file for guidance. Save your edits. Deploy the SlxClient portal. If necessary, repeat these steps to turn Password Self-service on for the Customer Portal. <p>Note: To use such email services as Gmail and Hotmail, the enableSSL setting must be set to True both in the appconfig settings and also on the mail service being used.</p>

Configuring Optional Features

This section addresses steps for configuring optional features available in Infor CRM SLX v10.0.

Upgrading Infor CRM SLX Xbar for Microsoft Outlook

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

Required for	Task	Description
Infor CRM SLX Xbar for Microsoft Outlook	74	<p>Enable users to install Infor CRM SLX Xbar for Microsoft Outlook.</p> <p>Infor CRM SLX Xbar for Microsoft Outlook must be installed on each user's machine. In most cases, the user performs the installation him or herself. To enable the installation to be successful, the Administrator must do the following:</p> <ul style="list-style-type: none"> ▪ Ensure users have the correct role. Each Xbar user must have been assigned the Standard User Role in the Core product. For information on assigning user roles, see the topic called "User Detail View" in the Web Client help. ▪ Ensure that users have Power User rights or greater for their computers.
Infor CRM SLX Xbar for Microsoft Outlook	75	<p>Copy the Infor CRM SLX Xbar Setup.exe set up files to the location where it can be accessed by your users</p> <p>The Infor CRM SLX Xbar Setup.exe is provided on the Infor CRM SLX media. To make the install available, do the following:</p> <ul style="list-style-type: none"> ▪ Infor CRM SLX Web Client users install Infor CRM SLX Xbar from the Web Client Tools, Options, General tab, where there is an Install Xbar for Outlook button. To enable this button to function correctly you must copy the Infor CRM SLX Xbar Setup.exe to C:\inetpub\wwwroot\SlxClient\Libraries\DesktopIntegration. ▪ Infor CRM SLX Windows Network Client users must manually launch the setup.exe. Copy the Infor CRM SLX Xbar Setup.exe to a convenient location and share that location with your Network Client users.

Required for	Task	Description
Infor CRM SLX Xbar for Microsoft Outlook	76	<p>Provide users with instructions for installing Xbar</p> <p>Provide your Infor CRM SLX Web Client users with the following installation instructions:</p> <p>Infor CRM SLX Web Client users</p> <ol style="list-style-type: none"> 1. Sign in to the Infor CRM SLX Web Client, expand the Tools menu and then click Options. 2. Click the General tab, and then click Install Xbar for Outlook. 3. Follow the installation instructions on screen. <p>Infor CRM Windows Client user</p> <ol style="list-style-type: none"> 1. Browse to the location provided by your Infor CRM SLX Administrator and copy the Infor CRM SLX Xbar Setup.exe to any convenient folder. 2. Click Infor CRM SLX Xbar Setup.exe , and then click Install.
Infor CRM SLX Xbar for Microsoft Outlook	77	<p>Providing connection credentials</p> <p>Users will require connection strings, user names, and passwords to be able to successfully sign into Xbar. Share the following information with each of your Xbar users:</p> <ul style="list-style-type: none"> ▪ User Name: Type your username. This is the username you use to log on to the CRM Clients. ▪ Password: Type your password. This is the password you use to log on to the CRM Clients. ▪ Service URL: This is the URL for your SData portal. For example: http://web.address.com/Sdata. ▪ Client URL: This is the URL for your Windows or Web Client. For example, http://web.address.com/SLXClient. <p>The first time Microsoft Outlook is opened after installing Infor CRM SLX Xbar, each user will be invited to configure the Outlook Connector. Instruct users to follow the instructions in the Online Help topic provided.</p>

Upgrading Infor CRM SLX Back Office Extension

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

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


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




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



If integrated data is in

Required for	Task	Task Description
Back Office Extension integration	78	<p>(Optional) Enable Multi-Currency</p> <p>If integrated data is in more than one currency you should enable Multi-Currency. The currency code must match your ERP base currency.</p> <p> See the topic called “Managing Currency” in the Administrator help file for more information.</p>
Back Office Extension integration	79	<p>(Optional) Ensure that the Infor CRM SLX Mobile Client has Multi-Currency enabled if it is enabled in the Web Client (Task 78)</p> <p>If your implementation includes multi-currency and the Mobile Client, ensure you have enabled multi-currency on the Mobile Client as detailed in task 35 of “Upgrading your core components”.</p>
Back Office Extension integration	80	<p>Upgrade the BOD pack bundles.</p> <p>BODS are Business Object Documents. They are the Infor ION messages that enable exchange of information between a supported ERP system and Infor CRM. Infor provides a BOD pack specific to each integration.</p> <p>For a full discussion of BODs, see the <i>Infor CRM Back Office Extension Configuration Guide</i> appendix named “BOD overview”.</p> <p>To upgrade an existing BOD Pack bundle</p> <ol style="list-style-type: none"> 1. From the product media, BOD Packs folder, copy the version of the BOD pack bundle that matches your ERP system and paste it to a convenient location. For example, if your ERP system is LN, use the BOD pack named Infor CRM VFS BOE Pack LN 10.0.zip. 2. Ensure you have Write permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties. 3. In the Application Architect, in the Project Explorer, right-click the project, and then click Install Bundle. 4. Navigate to the folder where you copied the BOD Pack.zip, and then click Open. 5. On the Select Bundle screen, click Next. 6. On the Select Items screen, ensure the Portals option is selected.

Required for	Task	Task Description
		7. Click Next , and then click Finish .

Required for	Task	Task Description
Back Office Extension integration	81	<p>Implement new IOBOX optimization scripts.</p> <p>Review and implement the new IOBOX optimization scripts presented in the <i>Infor CRM Back Office Extension Configuration Guide for Infor ION</i>, Chapter 4, "Defining the Infor CRM IOBOX."</p>
Back Office Extension integration	82	<p>If necessary, create and customize your own BODs using AnyBod.</p> <p>For more information, see the documents called <i>Infor CRM Back Office Extension Customization User Guide</i> and <i>Infor CRM Back Office Extension Configuration Guide for Infor ION</i>. Both documents are available from the Infor Support Portal on the Infor Concierge web site: https://conciierge.infor.com/.</p>
Back Office Extension integration	83	<p>(Optional) Customizing your Back Office Extension configuration.</p> <p>If necessary, you can customize your Back Office Extension implementation. See the documents called <i>Infor CRM Back Office Extension Customization Guide</i> and <i>Infor CRM Back Office Extension Configuration Guide for Infor ION</i>.</p>
Back Office Extension integration	84	<p>(Optional) Enable Normalized Base Currency.</p> <p>The Normalize Base Currency feature enables capturing transactions in varying currencies from multiple back offices or accounting entities and being able to report based on a single currency. It uses the base currency defined by Infor CRM.</p> <p> For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named "Enabling the Normalize Base Currency Values custom setting".</p>
Back Office Extension integration	85	<p>(Optional) Enable Master Data Consolidation</p> <p>This feature consolidates duplicate accounts with the same CustomerID, which can result when host systems such as ERP-M3, ERP-LX and ERP-Visual. This applies to Accounts, Ship Tos, Bill Tos, Pay Froms, Contacts, Products, and Persons.</p> <ul style="list-style-type: none"> ▪ This feature is off by default until you select the Master Data Consolidation option when running the Conversion Utility. ▪ Once Master Data Consolidation has been enabled, you cannot roll back the converted data. <p>If your environment does not already contain pre-existing data from an ERP system, you can enable Master Data Consolidation from the Infor CRM Web Client.</p> <p>To enable</p> <ol style="list-style-type: none"> 1. Sign in to the Infor CRM Web Client as Administrator. 2. On the Navigation bar expand Integration, click Integrations. 3. In the list view, select Back Office Extension. 4. In the detail view, on the Options tab, scroll to locate Master Data Consolidation. 5. Double-click in the Value column and change False to True. 6. Click the Save icon. <p>If you are upgrading an environment that contains pre-existing data duplicates, and you did not run Master Data Consolidation in task 35, you may do so at any time.</p> <p>To consolidate existing data</p> <ol style="list-style-type: none"> 1. On the machine where Infor CRM Admin Tools is installed, locate the

Required for	Task	Task Description
		<p>ConversionUtility_10.0.exe. This is typically “C:\Program Files (x86)\Saleslogix”</p> <ol style="list-style-type: none"> 2. Open ConversionUtility_10.0.exe. 3. Select Master Data Consolidation. 4. Click Update.
Back Office Extension integration	86	<p>(Optional) Enabling System of Record</p> <p>Optionally, Infor CRM SLX may publish a limited set of Business Object Documents, BODs, as the system of record in the absence of a host ERP system.</p> <p>These instructions assume that Infor CRM SLX Back Office Extension is already configured in your environment. This includes configuration with Infor ION and a supported ERP system.</p> <p>To enable</p> <ol style="list-style-type: none"> 1. Sign into the Infor CRM Web Client as the Administrator. 2. On the Integrations List view, click Back Office Extension, and click the Options tab. 3. Locate and set the Tenant and the Logical ID. The Tenant and the Logical ID fields contain the same values as those used in the Infor ION Connection point defined for Infor CRM. If you do not have these values, contact your ION Administrator. 4. Click Save. 5. While still in the Back Office Extension detail view, click the Back Offices tab. 6. In the grid, locate and click InforCRM SOR. 7. In the Back Office - InforCRM SOR detail view, set the Logical ID. This is the Infor CRM Logical ID and is the same value used to set the Logical ID in step 3 above. 8. Select the Active check box and then click Save. You must now provide the appropriate users with permissions to Promote Opportunity records from Infor CRM. <p>For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “What is System of Record?”.</p> <p>Enabling Permissions for Promote</p> <p>When Infor CRM is enabled as system of record, users with appropriate permissions will have the ability to promote selected record types to the ERP system. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Promote feature will not be available to users who have not been assigned permissions.</p> <p>To assign Promote permissions</p> <ol style="list-style-type: none"> 1. Sign into the Infor CRM Web Client as the Administrative user. 2. In the Navigation bar, expand Administration, select Roles, and select the role assigned to users who are to be given permissions to Promote. 3. You may choose to create a new role or assign these permissions to an existing role, such as the Standard Use role.

Required for	Task	Task Description
		<ol style="list-style-type: none">4. Click the Actions tab.5. Click the Add (plus) button.6. In the Lookup, perform a search by selecting Name, then select Contains, and then type Promote.7. Double-click each action you want to assign to the role, and then click Close to close the Lookup.

Required for	Task	Task Description
Back Office Extension integration	87	<p>(Optional) Configuring Price and Availability</p> <p>If your Infor CRM installation includes the Back Office Extension feature, the following steps are required to configure Price and Availability. You do not have to reconfigure Price and Availability if you already configured it during a previous update.</p> <p>Adding the End Point URL for the Back Office Price Services</p> <p>For the Back Office Price services to communicate correctly with the ERP, you must add the unique End Point URL for each Back Office Price service supported by your ERP. Contact your ERP Administrator for these Back Office URL.</p> <p>For on-premises implementations using Basic authentication</p> <p>To modify</p> <ol style="list-style-type: none"> 1. Sign in to Infor CRM as Administrator. 2. In the Navigation Bar, expand Administration, and then click Integrations. 3. Click Back Office Extension. 4. In the Back Office Extension detail view, click the Back Offices tab 5. Click to select your Back Office. 6. In the Back Office detail view, in the Price Services tab, click the Price Service you want to edit. 7. In the Price Service detail view, in the End Point field, copy and paste the End Point URL that matches the Price Service in the ERP. This is the End Point URL provided by your ERP Administrator. 8. If necessary, enter the User name and Password. This is the User name and Password provided by your ERP Administrator 9. Repeat steps 6 and 7 for each Price Service listed for your ERP. <p>For multi-tenant implementations using OAuth-2 authentication</p> <p>Please refer to KB 2183558 for set-up instructions.</p>

Required for	Task	Task Description
Back Office Extension integration	88	<p>Update the ION Connection Point and Document Flows</p> <p>ProcessQuote and ProcessSalesOrders must be added to the ION Connection Point and Document flow to the host ERP system to receive this information from Infor CRM.</p> <p>For instructions on updating ION Connection points and Document flows, see the Infor CRM Back Office Extension Customization Guide. This document is available in the Infor CRM SLX v 10.0 KB article and from docs.infor.com.</p> <p>Confirm necessary BOD Mapping Outbound triggers are enabled</p> <p>These triggers must be enabled on any entity that is bi-directional, for Infor CRM to publish BODs to your host ERP system. The default setting on entities that are not bidirectional is off.</p> <p>See the Systems Integration Guide for your ERP for a full list of required triggers.</p> <p>To modify</p> <ol style="list-style-type: none"> 1. Sign in to Infor CRM as Administrator. 2. In the Navigation Bar, expand Administration, and then click Integrations. 3. Click Back Office Extension. 4. In the Back Office Extension detail view, click the Back Offices tab. 5. Click to select your Back Office. 6. In the Back Office detail view, in the BOD Mappings tab, review the settings in the following columns for each mapping: <ul style="list-style-type: none"> ▪ Outbound on Create Enables creating new records in CRM and promoting them to the host system. ▪ Outbound on Update Enables modifying promoted records and publishing changes to the host system. ▪ Outbound on Delete (optional) Enables the Delete button on the detail view tabs, which enables users to delete Product lines in Quotes and Sales Orders. Note that it also enables the Delete button on the detail view, which enables users to delete the entire Sales Order or Quote. 7. If the settings do not match the settings specified in Systems Integration Guide for your ERP, select the Mapping to open the BOD Mapping Detail view and edit the setting using the pick list for each trigger.

Enabling integration with Infor Configure Price Quote (CPQ)

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

Required for	Task	Description
	89	<p>(Optional) Enable Infor CRM Sales Orders and Quotes to use Infor Configure Price Quote (CPQ-Configurator).</p> <p>Infor CPQ provides a visual, rules-based configurator software that integrates with Infor CRM to accelerate product configuration, pricing and quoting. The connection to Infor CPQ is available in Infor CRM. You must enable the configuration and then create the configuration groups that will provide the correct components.</p> <p>For more information about this feature, and for instructions on how to enable it, see the Infor CRM Web Client help topic named “Infor CPQ Overview”.</p> <p>To enable</p> <ol style="list-style-type: none"> 1. Sign in to the Infor CRM Web Client as Administrator. 2. In the Navigation Bar, expand Integration and then click Integrations. 3. In the Integrations List View, click Infor CPQ. 4. In the Integration - Infor CPQ detail view, The integration boxes will be autofilled by default. 5. Click the Enabled check box and then click Save. 6. Select the Configuration Group tab and then click Add Configuration (plus icon). 7. In the Add Configuration Group window, type the information that will connect Infor CRM to the product information in the product configurator. If you do not have this information, contact your CPQ administrator: <ul style="list-style-type: none"> ▪ Application Name: The application name registered in the Product Configuration Manager Enterprise Manager. It is a combination of the configuration model and the output database. For example: InforCRM_DB. ▪ Config Group Name: Type the intuitive name of your choice. ▪ Description: A description of the group. ▪ Instance Name: The instance ID that identifies your database instance. For example, InforCRM_DB. A single server can host several instances of PCM Configurator. ▪ Name Space: The namespace of the product configurator model as defined in PCM Design Studio. ▪ Ruleset Name: This is the name of the Product Configuration Model as defined in PCM Design Studio. For example, if the product being designed is a bicycle, the Ruleset name assigned might be “Bike”. ▪ Service URL: The URL for the Integration Web Service. ▪ API Key: The key used to identify the tenant connection to the API. This key can be acquired by the tenant administrator through the PCM Home page. Keep this key private.

Required for	Task	Description
		Task 89 - continued <ol style="list-style-type: none">8. Click Test link.9. If the test status is successful, click OK.10. Repeat steps to 6 through 9 for each group you need to add.

Enabling integration with Infor OS Portal

Required for	Task	Description
Infor OS Portal	90	<p>Disable cookie partitioning</p> <p>You must set the AllowPartitionedCookieAttribute custom setting to False. Amazon AWS does not support cookie partitioning for its own cookies, such as that for the Application Load Balancer (ALB).</p>
Infor OS Portal	91	<p>(Optional) Integrate with Infor OS Portal</p> <p>For steps to integrate Infor CRM SLX v10.0 with Infor OS Portal, see the <i>Infor CRM SLX Integrating with Infor OS Portal</i> document.</p> <p>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 10.0 see KB3652600. For all other versions see KB2289845. We recommend that you check either location periodically for updated documentation.</p>
	92	<p>(Optional) Enabling CPQ Enterprise Quoting</p> <p>The implementation of the Infor CPQ Enterprise Quoting user interface as the Infor CRM Quote user interface requires:</p> <ul style="list-style-type: none"> ▪ Infor CPQ Configurator implemented and configured. See task 89. ▪ Infor CPQ Enterprise Quoting integration configuration parameters and endpoint defined in the Infor CRM, Infor CPQ integration form EQ Configuration tab. ▪ EQ BOD Pack loaded and configured with the corresponding ION Connection Point Logical ID. ▪ Integration with a CPQ Enterprise Quoting compatible host ERP system. ▪ Infor CRM Master Data Consolidation option enabled. See task 85. <p>To enable CPQ-Enterprise Quote user interface:</p> <ol style="list-style-type: none"> 1. Provision Infor CRM in a common Infor OS Portal tenant with Infor CPQ Enterprise Quoting 2. Sign in to the Infor CRM Web Client as Administrator. 3. In the Navigation Bar, expand Administration and then click Integrations. 4. In the Integrations list View, click Infor CPQ. 5. In the Integration - Infor CPQ detail view, the integration boxes will be automatically completed by default. 6. Update the EQ Configuration tab content using on the implementation settings of CPQ Enterprise Quoting. 7. Update the Configuration Group tab with the CPQ configurator integration parameters. 8. On the Infor CPQ integration detail view, select the Enabled check box. 9. Click Save. 10. Update the Infor EQ Back Office Logical ID. 11. If you have not already run the conversion utility to enable the Master Data Consolidation integration to convert the pre-existing data, do so using the steps in task 85.

Next Steps

You have completed the upgrade to Infor CRM v10.0. For more information about the changes in this release:

See [Chapter 2, "What's New in this release" on page 53](#) and the "What's New in this Release" topic in the online Help systems for an explanation of the new features.

See [Chapter 3, "Changes in this release" on page 79](#) for information about the schema, plugins, and files changes in this release.

Chapter 2

What's New in this release

2

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



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

Breaking Changes

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

10.0

- The CRM SLX v10.0 conversion utility updates the underlying data to use positive-based discount values of legacy adjustment content for:
 - Opportunity_Product
 - QuoteItem
 - SalesOrderItem

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 Enhancements

Application	Feature
10.0	
General enhancements	
	<ul style="list-style-type: none"> ▪ Updated the Crystal Runtime to Sp 37 ▪ Replaced Microsoft C++ REdistributable with version 2015-2022
SpeedSearch	
	<p>SpeedSearch uses dtSearch version 7.2501.8837.1 and has the following indexing limitations:</p> <ul style="list-style-type: none"> ▪ 2GB limit on document size (ZIP, CSV file types have no limit) ▪ 1 TB text limit on individual Index size ▪ Max # of documents in a single Index is 2 billion
Web Client	
	General
	You can modify opportunity associations on closed quotes or sales orders.
	Added Credit Hold to the Account Status picklist.
New forms	When a lead is converted to a contact and account the lead information is now preserved on the Lead Conversion tab on the Account, Contact, and Opportunity detail views.
Updated form*	The Add/Edit Target Response dialog box now has a Task field to specify a task.
Updated form*	When updating multiple records, fields that allow null values can now be set to null.
Updated forms*	Importing records

Application	Feature
	<ul style="list-style-type: none"> ▪ New option to update Infor CRM SLX data with imported data. ▪ New option to set a default account manager.
	Generative AI integration
New form*	<p>AI Assistant</p> <p>Use the new AI Assistant to answer questions about Infor CRM SLX data, perform calculations, or view a list of records. See Using the AI Assistant for more information.</p> <p>Note: You can access AI Assistant from the AI Assistant icon on the menu bar adjacent to the SpeedSearch field.</p>
New form*	<p>AI Summary tab</p> <ul style="list-style-type: none"> ▪ Available on the Account, Contact, Campaign, and Ticket detail views. ▪ Displays an AI-generated summary of the activities, history, and related items, such as opportunities or products, for the current record. ▪ Provides recommended actions based on the summary information, for example, schedule a meeting or draft an email. . ▪ On the Account detail view, the AI Summary tab includes Engagement and Sentiment scores: <ul style="list-style-type: none"> ▪ Engagement indicates the frequency of interactions with the account. Possible options: Very Active, Active, Inactive, or Stale. ▪ Sentiment identifies if the engagement is positive, negative, neutral, or a mixture of positive and negative. Sentiment is only displayed if the Engagement is Very Active or Active. <p>See "AI Summary tab" in the Web Client help.</p>
Updated form*	View the AI Summary of a selected attachment on the Attachments tab. See "Attachments tab" in the Web Client help..
New form	The AI Newsfeed tab on the Account detail view provides an AI-generated newsfeed for the current account. See "AI Newsfeed tab" in the Web Client help..
	Dashboards and Widget panels
Updated forms*	Dashboard tabs are now called layouts
	<p>Widget panels</p> <ul style="list-style-type: none"> ▪ Widget panels can display dashboard content outside the Dashboard. ▪ Widget panel layouts display the same widgets as the Dashboard. ▪ Widgets in a widget panel have the option to be contextual so that widget data is based on the location. <ul style="list-style-type: none"> ▪ On a detail view, widgets can be contextual to the specific record. ▪ On a list view, widgets can be contextual to the group and any filters. ▪ Widget panels have been added to list views to replace the existing KPIs panel and can be collapsed or hidden. See "Working with list view widget panels" in the Web Client help. ▪ Widget panels can be added to other views in the Application Architect. ▪ Depending on access rights, users can create and manage one or more personalized layouts or view layouts shared by the administrator or other users.
	<p>KPI widgets</p> <p>KPI widgets replace list view KPIs and provide the ability to create custom KPIs.</p>

Application	Feature
	<ul style="list-style-type: none"> ▪ Comparison KPI - Displays two values side-by-side for comparison. For example, the same metric across different time periods, minimum and maximum values of the same metric, or two related metrics. See Working with a Comparison KPI widget. ▪ Single KPI - Displays a single value. For example, a count, or sum value. See Working with a Single KPI widget. ▪ Stacked KPI - Displays two related values, one above and one below. For example, a count of records and the sum value for those same records. See Working with a Stacked KPI widget.
Updated form*	<p>New or updated Widget settings</p> <ul style="list-style-type: none"> ▪ Widget widths can now be as small as 1, allowing more widgets to fit in a row. However, some widgets may require larger widths. By default, widget width and height options are set to the smallest recommended size for optimal viewing based on the widget type. ▪ Show Border option to display or hide widget borders. ▪ Color option to assign colors to data sources for Bar, Bubble, Column, Gauge, and Line widgets. It is also available for KPI widgets if the Show Circle option is selected. ▪ A new query builder mode for adding or modifying data sources. This simplifies the creation of advanced SData Entity Where Clauses. See "Using the Data Source SData entity where clause Query Builder" in the Web Client help. <p>See "Widget Settings" in the Web Client help.</p>
	<p>Widget improvements</p> <ul style="list-style-type: none"> ▪ Widget titles and subtitles are now centered instead of left aligned. ▪ Click a segment of a chart widget to view the detailed data for the segment. ▪ If same dimension value is used in multiple widgets in a layout, this value is represented by the same color in all chart widgets, for easier comparison. Example, for multiple widgets that display data for account managers (the dimension), the same color is used for each user across all widgets in that layout.
	<p>Dashboard improvements</p> <p>Added the Opportunity Forecast layout</p>
	<p>CRM Workflows</p>
Updated forms*	<ul style="list-style-type: none"> ▪ Updated CRM Workflow Step Instance detail view to only show Approval information for Approval steps. ▪ Updated the CRM Workflows list view to replace approval-centric columns with Step Status and Approval (status).
	<p>OCM Email Marketing</p>
New form and updated forms*	<p>If OCM Email Marketing integration is configured and enabled, you can create email campaign tasks in Infor CRM SLX and use Infor Omni-Channel Campaign Management (OCM) Email Content Editor to create an email template. Next you can define and launch the email campaign task in the OCM Email Content Master. Once launched you can view metrics at the task level or target level. See Email marketing integration campaign tasks.</p> <p>This</p>
	<p>Contour</p>
Updated forms*	<ul style="list-style-type: none"> ▪ A new option for Contour Contact Distance Search to return all contacts, not just the primary contact.

Application	Feature
	Journeys
Updated forms*	<ul style="list-style-type: none"> ▪ Customer Journeys are now “Journeys”. ▪ You can specify a default journey for new opportunities on the Tools, Options, Opportunities tab.
	Back Office
Updated forms*	<p>Simplified edit product discount interface to enable higher precision of discount calculations for small amounts.</p> <ul style="list-style-type: none"> ▪ Opportunity Edit Product dialog box, Integrated Pricing tab these fields are updated: <ul style="list-style-type: none"> ▪ Adjustment Unit Price is renamed to Adjusted Price ▪ Total Amount is renamed to Extended Price ▪ Extended Discount Amount is renamed to Extended Discount ▪ Quote and Sales Order Edit Product dialog box Integrated Pricing tab these fields are updated: <ul style="list-style-type: none"> ▪ Unit Adjustment is renamed to Adjusted Price ▪ Percent field is renamed to Discount <ul style="list-style-type: none"> • Now uses positive values to indicate the percentage by which the price is reduced. This ensures consistency for handling discount data across the system. ▪ Adjusted Unit Price is renamed to Extended Discount ▪ Extended Pretax Amount is renamed to Extended Price
Breaking change	
	Converting opportunities or quotes to sales orders includes pricing discount details provided by the host ERP system.
Web Client Administrator	
	General
	Asynchronous state provider improves general Web Client performance.
	CRM Workflow
	Trigger conditions can now include parent properties.
Updated form*	The Change Orientation icon on the Workflow Designer tab can change the workflow to display horizontally or vertically.
Updated form*	Ability to define a name for a Stop Workflow step.
Updated form*	Update Entity steps now support updates to a parent property.
	Integrations
Updated form	<p>Generative AI</p> <p>The Generative AI integration includes AI Assistant, AI Summary, and AI Newsfeed features. See "Configuring the Generative AI integration" in the Web Client help.</p> <p>Several performance counters were exposed to see AI chat performance related data in the console output in the browser when in developer mode.</p>
Updated form	<p>OCM Email Marketing</p> <p>This allows users to create email campaign tasks in Infor CRM SLX using the Infor Omni-Channel Campaign Management (OCM) Email Content Editor and the OCM Email Content Master. See "Configuring the OCM Email Marketing integration" in the Web Client help.</p>

Application	Feature
	Note: This integration is not supported in Oracle environments.
	Journeys
Updated form*	Journey Stages now have the option to specify properties to be updated with a specified value, when the stage is completed. For example, update the Opportunity Stage or Close Probability when the stage is completed.
	Job Manager
Updated form*	Job Manager has a new Terminate Job Service option to terminate the Job Service if you are unable to stop and restart the Job Service. Once terminated, you can restart the Job Service
	Database Manager
Updated form*	SQL Job Definitions tab allows the administrator to view and manage SQL job definitions that are to be performed by the Job Server.
	Execute Query
Updated form*	Improved the Execute Query interface.
	Plugins
	There are two new plugin types added for: Widget Panel layout: <ul style="list-style-type: none"> ▪ Type 39 - Responsive Dashboard Widget Panel ▪ Type 40 - Responsive Dashboard List Widget Panel These new plugins are listed in the Plugin Manager "All Plugins" group.
	Secured Actions
	Actions previously only available to the Administrator are now secured actions that can be added to user roles <ul style="list-style-type: none"> ▪ Administration//ExecuteSQL: Grants permission to access Execute Query on the Tools menu and execute SQL queries. Added to Developer role. ▪ Administration/GroupManager/ManageGlobalJoins: grants permission to manage global joins from Query Builder. Added to Administrator role. ▪ Administration/ManageCalculatedFields: Grants permission to manage calculated fields in Query Builder. Added to Developer role. ▪ Administration/ManageDatabase: Grants permission to access Database Manager under Administration in the navigation bar and perform database management actions. Added to Developer role. ▪ Administration/ManageDeployments: Grants permission to access Manage Deployments on the Developer Tools menu and perform deployment actions. Added to Developer role. Note: The user must also have permission to view the Developer Tools menu (Toolbar/Developer). ▪ Administration/ManagePlugins: Grants permission to access Plugin Manager under Administration in the navigation bar and perform plugin management actions. Added to Developer role. ▪ Toolbar/Tools/SystemSummaryReport: Grants permission to view the System Summary Report on the Tools menu. Added to Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/ReassignActivities: Grants permission to access the Reassign Activities option in the Activities list view task pane. Added to Administrator role. Note: Users with this secured action will still require view and edit calendar access to reassign other users' activities.

Application	Feature
	<ul style="list-style-type: none"> ▪ Administration/Security/EveryoneOwnerAssignment: Grants permission to change the owner of a record if the current owner is 'Everyone'. Not associated with a role.
	<ul style="list-style-type: none"> ▪ Administration/Security/OwnerAssignmentNoAccess: Grants permission to change record ownership to any other team/user regardless of access to the other team/user. Not associated with a role.
	<p>Dashboard and Widget panel layouts secured actions:</p> <ul style="list-style-type: none"> ▪ Dashboard/AddLayout: Grants permission to create and manage personal layouts. Added to Standard User and Administrator roles. ▪ Dashboard/ShareLayout: Grants permission to share personal layouts. Added to Standard User and Administrator roles. ▪ Dashboard/DeleteLayout: Grants permission to delete any layouts, including shared layouts on the Dashboard or in a widget panel. Added to Administrator role.
	<ul style="list-style-type: none"> ▪ Entities/Opportunity/OverridePricing: Grants permission to override default pricing information (Unit Price, Adjusted Price, Discount, and Extended Discount) for an opportunity product. Not associated with a role.
	<ul style="list-style-type: none"> ▪ Entities/Product/Import: Grants permission to override default pricing information (Unit Price, Adjusted Price, Discount, and Extended Discount) for an opportunity product. Not associated with a role.
	<ul style="list-style-type: none"> ▪ Import/History/View: Allows access to the Import History view. Added to the Standard user role.
	<ul style="list-style-type: none"> ▪ Toolbar/AIAssistant: Grants permission to access the AI Assistant in the toolbar. Added to Standard User and Administrator roles.
	<p>Custom Settings</p>
	<p>New custom settings for Generative AI</p> <ul style="list-style-type: none"> ▪ Activity Override Summary Age in Months Specify the time range (in months) for which activities are available to summarize. Default is 12. ▪ Campaign Override Summary Age in Months Specify the time range (in months) for which campaigns are available to summarize. Default is 36. ▪ HistoryOverrideSummaryAge Specify the time range (in months) for which history items are available to summarize. Default is 24. ▪ LeadOverrideSummaryAge Specify the time range (in months) for which leads are available to summarize. Default is 36. ▪ OpportunityOverrideSummaryAge Specify the time range (in months) for which opportunities are available to summarize. Default is 48.
	<p>New custom settings introduced to hide existing features:</p> <ul style="list-style-type: none"> ▪ Display List View Filter Counts Displays or hides list view filter counts. ▪ HideContactProcesses Displays or hides the Processes tab on the Contact detail view and Processes on the navigation bar, under Sales. ▪ HideSalesProcesses

Application	Feature
	<p>Displays or hides the Sales Process tab on the Opportunity detail view and the Default Sales Process option on the Tools Options Opportunities tab.</p> <ul style="list-style-type: none">▪ HideWelcomePage Displays or hides Welcome item on the navigation bar, removes Welcome from the Show on Startup option on the Tools Options General tab, and removes the ability to promote a group to the Welcome page.



Application	Feature
	<ul style="list-style-type: none"> ▪ StickyCookieExpires The number of days the SixStickySessionId cookie should expire after being created. Default is 0 which creates an ASP.NET Session cookie. .
	<p>Back Office</p>
	<p>New Back Office Extension custom settings include:</p> <ul style="list-style-type: none"> ▪ SyncDelayBetweenWorkerThreadsInSeconds Defines the delay time (in seconds) between the start of each inbound processing thread. The default value is 5 seconds. ▪ SyncMaxPercentageOfThreadsToConsumeInDecimalFormat: The portion (as a decimal) of the 10 worker threads that are used for inbound BOD processing. The default is 0.8. ▪ SyncMaxThreadLoadGovernorInKBytes The maximum BOD content size (in kilobytes) that each inbound worker thread can process. The default is 40960 (40 MB in KB). ▪ SyncReloadLowWaterFactorInDecimalForm Defines when the inbound processor adds more prioritized BODs to the in-process queue. This sets the maximum fraction (as a decimal) of the 'Inbox Message Fetch Size' that can remain in the queue before reloading with the next batch of prioritized BODs. The default is 0.2.
	<ul style="list-style-type: none"> ▪ M3 integrations now support CRM SLX price overrides for sales order products before they are promoted to the M3 host system. To use price overrides in M3 integrations set the 'Price Overrides enabled' custom setting to True. See M3 with OAuth 2.0 authentication price service information.
	<ul style="list-style-type: none"> ▪ The discount amount for a sales order item is calculated as the difference between the pricelist price (DocPrice) and the discounted calculated price (DocCalculatedPrice). The Infor CRM DocCalculatedPrice content corresponds to the discounted unit price before the tax (UnitPretaxAmount) is published by the host ERP system in both Sales Order BOD and price service content.

Application	Feature
	<ul style="list-style-type: none"> Back Office performance is improved to reduce memory usage and optimize processing in IONInboxJob and IONInboundProcessorJob threads.
Application Architect	
	<ul style="list-style-type: none"> The Show Button property on a phone control, when set to True, will display a phone icon that when clicked will dial the phone number if a phone application is present.
	<p>Widget Panel container control</p> <ul style="list-style-type: none"> Widget panels can display the same widgets as the Dashboard, but there is also the option to make the widgets contextual so that widgets on a widget panel are based on the detail view or list view group and any filters. Each widget panel may include one or more layouts created and shared by the administrator or individual users. Widget panels have been added to the list views as a replacement for list view KPIs.
	New Base Portal template with the minimum settings required for a portal.
	<p>Expose to AI Summary attribute</p> <ul style="list-style-type: none"> Added to expose One to Many relationships to an entity in an AI Summary definition. If set to True, the related entity will be available in the Include Related Entity drop-down list. For more information see the Web Client help topic "Including a related entity in an AI summary".
	<p>Read Only Condition</p> <p>The steps to use this property have changed.</p> <ol style="list-style-type: none"> Open the JavaScript Editor. Type a JavaScript function that returns a value of true function() { return true; } The JavaScript function will be evaluated each time the grid's datastore requests data.

Enhancements since version 9.0

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.

Application	Feature
Web Client	
	General
	<p>History List view</p> <p>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.</p>
	Database Change history items are now read-only.
	Dragging and dropping an email to the Quote, Sales Orders, Campaign, Return, and Defect Notes/History tab now saves the email as a history record with an association to the detail view record.
	Lead Source is now a drop-down list instead of a lookup on detail views and when adding a record.
	Only jobs initiated by a user now display in the Job Notification dialog
	Opportunities
	When adding a new opportunity, you can now add an active campaign.
	Ability to update the unit price of a zero priced opportunity product on an Opportunity just like a quote or sales order product.
	Quotes and Sales Orders
	When converting an opportunity to a quote or sales order, the primary associated contact is automatically added as the associated contact on the new quote or sales order.
	The Quote and Sales Order detail views now include a Closed Date field.
	When converting an opportunity to a quote or sales order, the primary associated contact should be the associated contact on the new quote or sales order.
	Products
	<p>Reordering products</p> <p>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.</p>
	<p>Ability to add product parts as a bundle and set a single bundle price</p> <p>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.</p>
	Dashboards
	Dashboards can now be shared with departments in addition to users and teams.
	Query Builder
	<p>Administrators and advanced users only</p> <p>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.</p> <p>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..</p> <p>For example, a column on the Accounts list view that shows the number of open tickets for each account.</p> <p>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..</p>

Application	Feature
	CRM Workflow
	<p>New step action types:</p> <ul style="list-style-type: none"> ▪ Approve ▪ Branch ▪ Business Rule ▪ Create Activity ▪ Create Entity ▪ Create History ▪ Send Email ▪ Start Workflow ▪ Stop Workflow ▪ Test Condition ▪ Update Entity
	Web Client Administrator
	CRM Workflow
	The new CRM Workflow Designer tab provides a new user interface for creating, editing and managing CRM workflow steps, including new step types.
	Job Server
	The ability to start and stop the Job Service from the Web Client Job Manager. Common tasks have been added to Stop Job Service when it is running and Start Job Service when it is stopped.
	Developer Tools
	<p>The Developer Tools menu adds the ability for administrators to:</p> <ul style="list-style-type: none"> ▪ Install a Bundle ▪ Rebuild Database Schema ▪ Rebuild Web Platform ▪ Deploy portals <p> 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".</p> <ul style="list-style-type: none"> ▪ View Bundles ▪ View Logs <p> The Developer Tools menu and options are not available for Oracle environments.</p>
	<p>Infor CRM SLX Cloud implementations can download the Application Architect from the Web Client.</p> <p>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.</p> <p>See the Web Client help topic "Downloading the Application Architect (Infor CRM SLX Cloud only)"</p>

Application	Feature
	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
	<ul style="list-style-type: none"> 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.
	Secured Actions
	<ul style="list-style-type: none"> Entities/Attachment/Delete - grants permissions to delete attachments. It is part of the Standard User role.
	<ul style="list-style-type: none"> 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
	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
	<p>Infor CRM SLX Cloud implementations only</p> <p>Infor CRM SLX Cloud implementations can download the Application Architect from the Web Client. See the Web Client help topic "Downloading the Application Architect (Infor CRM SLX Cloud only)" for steps.</p> <p>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.</p> <p>Downloading the model will overwrite any local customizations.</p>

Application	Feature
9.2	
General enhancements	
	Connection Manager
	<p>For Microsoft SQL only</p> <p>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.</p> <p>See (Microsoft SQL Only) Updating Database Connection in Connection Manager for steps.</p>

Application	Feature
	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*	<p>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.</p> <p>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.</p> <p>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.</p>
	SpeedSearch enhancements
Updated form*	<ul style="list-style-type: none"> ▪ The SpeedSearch text box in the menu bar and SpeedSearch view: <ul style="list-style-type: none"> ▪ 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

Application	Feature
	<ul style="list-style-type: none"> ▪ 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.
	Tickets
	When a ticket is closed the Closed field is updated.
Web Client Administrator	
	Customer Journeys
New form*	Ability to create and manage customer journeys and customer journey stags and steps.
	Job Server improvements
	<ul style="list-style-type: none"> ▪ Enhanced error handling ▪ JobListener(s) notified of jobs to be executed ▪ BOD load balancing
	Sync History
	Sync History is now available from the Administration menu, in addition to the Navigation bar under Integrations and Administration.
	Developer Tools
Updated form*	<ul style="list-style-type: none"> ▪ 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. <p>Note: The Developer tools menu and options are not available for Oracle environments</p>
	CRM Workflow
	Ability to manually start a workflow using the SData API <ul style="list-style-type: none"> ▪ Method: QueueWorkflow ▪ ResourceKind - ionWorkflowDefinitions ▪ Parameters - currentEntityType (string), entityId (string) ▪ Result: IONWorkflowId (string)
	Users
New form*	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.
	Office Profile
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.

Application	Feature
	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
	<ul style="list-style-type: none"> ▪ Administration/CustomerJourney/Add - grants permission to add a customer journey. It is part of the Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/CustomerJourney/Delete - grants permission to delete a customer journey. It is part of the Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/CustomerJourney/Edit - grants permission to edit a customer journey. It is part of the Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/CustomerJourney/View - grants permission to view a customer journey. It is part of the Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/CustomerJourneyInstance/Delete - grants permission to delete a customer journey instance. It is part of the Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/License/Add – grants permission to add an Infor CRM license – Not part of any role.
	<ul style="list-style-type: none"> ▪ Administration/License/Delete – grants permission to delete an Infor CRM license. Not part of any role.
	<ul style="list-style-type: none"> ▪ 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
	<ul style="list-style-type: none"> ▪ Customer Portal passwords are now stored using a one-way hashing function, meaning they cannot be decrypted. ▪ The conversion utility will convert existing passwords. ▪ 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
9.3	
Web Client	
	General
	<ul style="list-style-type: none"> 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.
	<ul style="list-style-type: none"> 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
	<ul style="list-style-type: none"> 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*	<p>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.</p> <ul style="list-style-type: none"> 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
	<ul style="list-style-type: none"> New triggers based on a date, a schedule or manual trigger. New trigger condition operators: <ul style="list-style-type: none"> On Change For date fields: Past due x Days, Past due x Hours, Within x Days, Within x Hours
	Customer Journey
	<ul style="list-style-type: none"> Supported for tickets, sales orders, and quotes. Supported for users: <ul style="list-style-type: none"> 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
New forms*	Database Manager allows the administrator to manage the database and perform related tasks in a

Application	Feature
	<p>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.</p> <p>Note: Database Manager is not available for Oracle environments.</p>
	Execute Query
New form*	<p>Execute Query allows the administrator to test or execute SQL statements.</p> <p>Note: Execute Query is not available for Oracle environments.</p>
	Plugin Manager
New forms*	<p>Plugin Manager list view displays Web plugins and allows the administrator to delete plugins and manage plugin releases.</p>
	SpeedSearch Manager
New forms*	<p>SpeedSearch Manager allows the administrator and users with permission to manage SpeedSearch indexes and schedules and set SpeedSearch settings.</p>
	Multi-Factor Authentication
New forms*	<ul style="list-style-type: none"> ▪ 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
	<p>On the Service/Support tab:</p> <ul style="list-style-type: none"> ▪ Manage Urgency codes used to prioritize tickets. ▪ Manage the Customer Portal Web Access User.
	<p>On the Email Setup tab:</p> <ul style="list-style-type: none"> ▪ Configure email Send to CRM attachment options ▪ Manage domain exclusions
	<p>On the Security tab:</p> <ul style="list-style-type: none"> ▪ Enable and configure Multi-Factor Authentication
	User detail view
	<p>On the Security tab:</p> <ul style="list-style-type: none"> ▪ Reset a user's authentication method on the User detail view Security tab.
	<p>New CRM Workflows tab to view and manage customer journeys for a user.</p>

Application	Feature
	Secured Actions
	<ul style="list-style-type: none"> Administration/Plugin/ReleaseToEveryone - grants permission to replease plugins to "Everyone" in Query Builder. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/AddIndex - grants permission to add a SpeedSearch index. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/AddSchedule - grants permission to add a SpeedSearch schedule. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/DeleteIndex - grants permission to delete a SpeedSearch Index. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/DeleteSchedule - grants permission to delete a SpeedSearch Schedule. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/EditIndex - grants permission to edit a SpeedSearch index. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/EditSchedule - grants permission to edit a SpeedSearch schedule. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/ManageSettings - grants permission to manage SpeedSearch Settings. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/RunSchedule - grants permission to run a SpeedSearch Schedule. It is part of the Administrator role.
	<ul style="list-style-type: none"> Administration/SpeedSearchManager/View - grants permission to view SpeedSearch Manager. It is part of the Administrator role.
	<ul style="list-style-type: none"> Entities/JobManager/StartJobService - grants permission to start or stop the job service. It is part of the Administrator role.
Application Architect	
	Reports Management
	<p>Download Reports to replace local reports with the reports from a specified Infor CRM SLX server.</p> <p>To download</p> <ul style="list-style-type: none"> 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
	<ul style="list-style-type: none"> Passwords are now stored using a one-way hashing function, meaning they cannot be decrypted. The conversion utility will convert existing passwords.

Application	Feature
9.4	
General enhancements	
	<ul style="list-style-type: none"> 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.

Application	Feature
	<ul style="list-style-type: none"> ▪ 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 Microsoft 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	
	<ul style="list-style-type: none"> ▪ 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	
	<ul style="list-style-type: none"> ▪ 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	
	<ul style="list-style-type: none"> ▪ 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: <ul style="list-style-type: none"> ▪ Contact Processes ▪ Sales Processes

Application	Feature
Windows Client	
	Mail Merge
	<ul style="list-style-type: none"> ▪ 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: <ul style="list-style-type: none"> ▪ Contact Processes ▪ Literature Requests ▪ Sales Processes
Web Client	
	General
	<ul style="list-style-type: none"> ▪ 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. ▪ When hovering over a read-only or disabled field the border is hidden.
Updated form*	<ul style="list-style-type: none"> ▪ In the Activity dialog box, if the Notes field is resized, it will remain resized whenever the activity is viewed.
	Contour
Updated forms*	<ul style="list-style-type: none"> ▪ 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.
	CRM Workflows
	<ul style="list-style-type: none"> ▪ CRM Workflows may now include Mail Merge and Run Report steps. See the Web Client help topic "What are CRM Workflows?"
	Dashboards
New forms*	<ul style="list-style-type: none"> ▪ Dashboard tabs can be hidden.
	Back Office
Updated form*	<ul style="list-style-type: none"> ▪ 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.
	<ul style="list-style-type: none"> ▪ 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)".
Web Client Administrator	
	CRM Workflow
	<ul style="list-style-type: none"> ▪ New step types for: <ul style="list-style-type: none"> ▪ 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".
	<ul style="list-style-type: none"> ▪ The Recipients tab in the CRM Workflow Approve, Mail Merge, Run Report, and Send Email step actions has been redesigned and updated to: <ul style="list-style-type: none"> ▪ Simplify the selection of user and owner fields. ▪ Include an option to send an email or approval to a user's manager.
	<ul style="list-style-type: none"> ▪ A Refresh button has been added to the CRM Workflow Definition Properties tab.

Application	Feature
	<ul style="list-style-type: none"> ▪ 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.
	<p>Developer Tools</p>
New forms*	<ul style="list-style-type: none"> ▪ Ability to manage deployments from the Developer Tools menu, Manage Deployments menu item. See the Web Client help topic "Deployment Manager". <p>Note: The Developer Tools menu and options are not available for Oracle environments</p>
	<p>Lead Capture</p>
New forms*	<ul style="list-style-type: none"> ▪ 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?"
	<p>Office Profile</p>
Updated form*	<ul style="list-style-type: none"> ▪ Currency tab <ul style="list-style-type: none"> ▪ 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. <p>See the Web Client help topic "Managing Currency".</p>
	<p>Entity Manager</p>
Updated form*	<ul style="list-style-type: none"> ▪ Ability to set the Workflow attribute for entities in Entity Manager.
	<p>Secured Actions</p>
	<ul style="list-style-type: none"> ▪ Administration/LeadCaptureConfiguration/View: grants permission to view the Lead Capture Configuration view. Added to Administrator role.
	<ul style="list-style-type: none"> ▪ Administration/LeadCaptureConfiguration/Edit: grants permission to edit the Lead Capture Configuration view. Added to Administrator role
	<ul style="list-style-type: none"> ▪ Contour/Map/Lead: Allows searching for and viewing leads on a map. Added to the Contour role.
	<ul style="list-style-type: none"> ▪ Contour/Map/Opportunity: Allows searching for and viewing opportunities on a map. Added to the Contour role.

Application	Feature
	<ul style="list-style-type: none"> Import/History/View: Allows access to the Import History view. Added to the Standard user role.
	Custom Settings
	<ul style="list-style-type: none"> (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
	<ul style="list-style-type: none"> (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
	<ul style="list-style-type: none"> (New) SyncWorkerJobLimit: Specifies the allowed number of concurrent worker jobs for calendar and contact sync.
	<ul style="list-style-type: none"> (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.
	<ul style="list-style-type: none"> (Deprecated) OutboundRetryCountBOE: Removed to prevent the creation of duplicate records in Infor CRM SLX and the host ERP system.
	Back Office
	<ul style="list-style-type: none"> 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.
	<ul style="list-style-type: none"> There is improved documentation for price overrides and price adjustments for integrated quote or sales order unit pricing. See: <ul style="list-style-type: none"> “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
	<ul style="list-style-type: none"> You can now download content including customer journeys, CRM workflows, reports and the model to the local database from a single location.
	Bundle Actions
	<ul style="list-style-type: none"> 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
	<ul style="list-style-type: none"> 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.



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.

10.0

- The Orm Entity Property Collection Editor has been deprecated. You can still view or edit entity properties from the Property Properties window.
- The Outbound RetryCount ION option has been removed from the Back Office Extension Options tab. This is a reference to the OutboundRetryCountION custom setting that was removed to prevent the creation of duplicate records in Infor CRM SLX and the host ERP system.
- SLXSDataSyncServer.exe, SLXSDataSyncServer.config, and SLXSDataSyncServer.xml files are obsolete. If there are references in Web.config files, they can be removed.

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
- 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 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 (install or bundle), type (form, script, and so on), and then alphabetically by name within the table for each type.

Finding script changes

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

To find script changes

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

Entities and Properties/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
AINewsfeed		New table to store AI Newsfeed provider information for the Generative AI integration.	10.0
AINewsfeed	AINewsFeedId	Primary key for the table	10.0
AINewsfeed	APIKey	API key for the newsfeed. Not all newsfeed providers require an APIKey.	10.0
AINewsfeed	CreateDate	The date the record was created	10.0
AINewsfeed	CreateUser	User who created the record.	10.0
AINewsfeed	Enabled	Flag indicating if the newsfeed provider is exposed for generating newsfeed data.	10.0
AINewsfeed	Name	The name of the newsfeed provider.	10.0
AINewsfeed	ModifyDate	The date the record was last modified	10.0
AINewsfeed	ModifyUser	User who last modified the record	10.0
AINewsfeed	User's company number	Key allowing developers and applications to programmatically access and retrieve news data from Google News.	10.0
AIProvider		New table to store AI provider information for the Generative AI integration.	10.0
AIProvider	AIProviderId	Primary key for the table	10.0
AIProvider	CreateDate	The date the record was created.	10.0
AIProvider	CreateUser	User who created the record	10.0
AIProvider	ModifyDate	The date the record was last modified	10.0
AIProvider	ModifyUser	User who last modified the record	10.0
AIProvider	Name	The name of the artificial intelligence provider	10.0

Entity	Property	Description	Version
AIProvider	APIKey	Unique identifier for AI provider	10.0
AIProvider	BaseUrl	The base Url specific to Infor GenAI	10.0
AIProvider	LogicalId	The Logical ID specific to Infor GenAI.	10.0
AIProvider	Endpoint	The iteration or revision of the AI model for Azure Open AI.	10.0
AIProvider	TokenLimit	The maximum number of words that an AI model can process at a time.	10.0
AIProvider	TokensPerMinute	The maximum number of tokens that an AI model can process at a time.	10.0
AIProvider	SimpleOptions	Stores parameters for simple AI functions	10.0
AIProvider	ComplexOptions	Stores parameters for complex AI functions	10.0
AIProvider	ModerateOptions	Stores parameters for moderate AI functions	10.0
AIProvider	RequestsPerMinute	The maximum number of requests that can be processed per minute.	
AISummary		New table to store AI Summary on a per record, per user basis.	10.0
AISummary	AISummaryId	Primary key for the table	10.0
AISummary	CreateDate	The date the record was created	10.0
AISummary	CreateUser	User who created the record.	10.0
AISummary	EntityId	The ID of the entity	10.0
AISummary	EntityType	The name of the entity	10.0
AISummary	ModifyDate	The date the record was last modified	10.0
AISummary	ModifyUser	User who last modified the record	10.0
AISummary	Summary	The AI summary information for a record	10.0
AISummary	SummaryDate	The date time the last summary was run for a record	10.0
AISummary	UserId	The ID of the user who last executed the summary for a record	10.0
AISummary	Payload	A memo property to store the AI Summary payload information.	10.0

Entity	Property	Description	Version
AISummaryDefinition		New table to store AI Summary definitions for the Generative AI integration.	10.0
AISummaryDefinition	AISummaryDefinitionId	Primary key for the table	10.0
AISummaryDefinition	CreateDate	The date the record was created	10.0
AISummaryDefinition	CreateUser	User who created the record.	10.0
AISummaryDefinition	Data	Json containing the structure of entities and excluded properties	10.0
AISummaryDefinition	Enabled	Flag indicating if the entity is exposed for AI summaries	10.0
AISummaryDefinition	EntityType	The name of the entity	10.0
AISummaryDefinition	ModifyDate	The date the record was last modified	10.0
AISummaryDefinition	ModifyUser	User who last modified the record	10.0
BackOffice	SeccodId	Is Nullable changed from True to False	10.0
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
CampaignTarget	CampaignStageId	Foreign key relationship to CampaignStage	10.0
CampaignTask	OCMEmailCampaignTask	Added to identify if the task is a campaign email task that will be executed in OCM	10.0
CampaignTask	OCMEmailsSent	Added to identify if the targets have been sent to OCM	10.0
Contact	SeccodId	Is Nullable changed from True to False	10.0
ContactMFAMethod		New table to support Multi-Factor Authentication	9.3
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 last modified the record	9.3
ContactMFAMethod	ModifyDate	The date the record was last modified	9.3

Entity	Property	Description	Version
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 authentication 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
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 last 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

Entity	Property	Description	Version
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
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 last 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
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 last 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

Entity	Property	Description	Version
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 last modified the record	9.2
CustomerJourneyInstanceStep	ModifyDate	The date the record was last modified	9.2
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

Entity	Property	Description	Version
CustomerJourneyInstanceStep	ActionEntityId	The primary key value of the record created for the step action	9.2
CustomerJourneyInstStageProp		New table to contain properties to be updated upon completion of journey instance stage.	10.0
CustomerJourneyInstStageProp	CreateDate	The date the record was created.	10.0
CustomerJourneyInstStageProp	CreateUser	User who created the record.	10.0
CustomerJourneyInstStageProp	CustomerJourneyInstanceStageId	Foreign key relationship to User entity(UserInfo table)	10.0
CustomerJourneyInstStageProp	CustomerJourneyInstanceStagePropertyId	Primary key for the table	10.0
CustomerJourneyInstStageProp	ModifyDate	The date the record was last modified.	10.0
CustomerJourneyInstStageProp	ModifyUser	User who last modified the record.	10.0
CustomerJourneyInstStageProp	Property	The property name for the Customer Journey definition entity.	10.0
CustomerJourneyInstStageProp	Value	The value the property will be set to on completion of the stage.	10.0
CustomerJourneyInstStageProp	CascadeOption	Value representing the cascade option: <ul style="list-style-type: none"> ▪ 0 - MatchingOnly ▪ 1 - All ▪ 2 - None 	10.0
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 last 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

Entity	Property	Description	Version
CustomerJourneyStage	Sequence	Order for which the stages are displayed for the customer journey	9.2, 10.0
CustomerJourneyStage	Probability	Probability of completing the customer journey once the current stage is complete	9.2, 10.0
CustomerJourneyStage	ExpectedDaysInStage	Number of days stage is expected to be open prior to close	9.2
CustomerJourneyStageProperty		New table to contain properties to be updated upon completion of journey stages.	10.0
CustomerJourneyStageProperty	CreateDate	The date the record was created.	10.0
CustomerJourneyStageProperty	CreateUser	User who created the record.	10.0
CustomerJourneyStageProperty	CustomerJourneyStageId	Foreign key relationship to User entity(UserInfo table)	10.0
CustomerJourneyStageProperty	CustomerJourneyStagePropertyId	Primary key for the table	10.0
CustomerJourneyStageProperty	ModifyDate	The date the record was last modified.	10.0
CustomerJourneyStageProperty	ModifyUser	User who last modified the record.	10.0
CustomerJourneyStageProperty	Property	The property name for the Customer Journey definition entity.	10.0
CustomerJourneyStageProperty	Value	The value the property will be set to on completion of the stage.	10.0
CustomerJourneyStageProperty	CascadeOption	Value representing the cascade option: <ul style="list-style-type: none"> ▪ 0 - MatchingOnly ▪ 1 - All ▪ 2 - None 	10.0
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 last modified the record	9.2
CustomerJourneyStep	ModifyDate	The date the record was last modified	9.2

Entity	Property	Description	Version
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 last modified the record	9.3
DatabaseAudit	ModifyDate	The date 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
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

Entity	Property	Description	Version
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
Defect	Seccodeld	Is Nullable changed from True to False	10.0
DiscountChargeItem	DiscountPercentageInOnly	Inbound only, M3-specific positive whole numeric percentage value published in DistributedCharge/Calculation/RateNumeric.	10.0
EmailTemplatePropertyView		New table combines the EmailTemplate and EmailTemplateProperty tables	9.1
ERPBillTo	Seccodeld	Is Nullable changed from True to False	10.0
ERPInvoice	SecCodeld	Is Nullable changed from True to False	10.0
ERPPayFrom	Seccodeld	Is Nullable changed from True to False	10.0
ERPShipTo	Seccodeld	Is Nullable changed from True to False	10.0
HistoryAssociation	CreateDate	Include changed from False to True, so the property is included in the generated output.	10.0
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 last 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
Integration	AIProviderId	Added as foreign key relationship to AIProvider	10.0

Entity	Property	Description	Version
Integration	Domain	Stores the configurations as json for a particular integration, The OCM integration is currently the only one that uses this model	10.0
Integration	Configuration Settings	New property added to store any configuration settings an integration may have outside of the core properties. This is stored as a JSON string. Initially added for AI.	10.0
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
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 last 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

Entity	Property	Description	Version
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 last 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
LeadCaptureMapping		New table that 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 last 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

Entity	Property	Description	Version
LeadCaptureMappingDetail	CreateDate	The date the record was created	9.4
LeadCaptureMappingDetail	ModifyUser	User who last 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
LeadHistory	CampaignId	Add as a foreign key relationship to CAMPAIGN to store campaign information for a converted lead.	10.0
LeadHistory	ConvertedDate	Added to store the date the lead was converted.	10.0
LeadHistory	LeadNameLastFirst	Calculated field added to store the converted lead's first name and last name.	10.0
LeadHistoryCampaign		New table to maintains the historical relationship between converted leads and their associated campaigns.	10.0
LeadHistoryCampaign	CampaignId	Foreign key relationship to CAMPAIGN	10.0
LeadHistoryCampaign	CreateDate	The date the record was created.	10.0
LeadHistoryCampaign	CreateUser	User who created the record.	10.0
LeadHistoryCampaign	HistLeadId	Foreign key relationship to HIST_LEAD	10.0
LeadHistoryCampaign	LeadHistoryCampaignId	Primary key for the table	10.0
LeadHistoryCampaign	ModifyDate	The date the record was last modified.	10.0
LeadHistoryCampaign	ModifyUser	User who last modified the record	10.0
LinkedInConfiguration	LinkedInConfigurationId		9.2
OCMCampaignTask		New table to store OCM Send Email task information	10.0
OCMCampaignTask	CampaignTaskId	Foreign key relationship to CampaignTask	10.0
OCMCampaignTask	CreateDate	The date the record was created.	10.0
OCMCampaignTask	CreateUser	User who created the record.	10.0
OCMCampaignTask	ECM Name	The name of OCM's email content master	10.0
OCMCampaignTask	LastSyncDate	The date the OCM campaign was last synced	10.0
OCMCampaignTask	ModifyDate	The date the record was last modified.	10.0

Entity	Property	Description	Version
OCMCampaignTask	ModifyUser	User who last modified the record	10.0
OCMCampaignTask	OCMCampaignId	The unique campaign id returned from OCM when a campaign task is sent to OCM	10.0
OCMCampaignTask	OCMCampaignName	The unique campaign name returned from OCM when a campaign task is sent to OCM	10.0
OCMCampaignTask	OCMCampaignTaskId	Foreign key relationship to OCMCampaignTask	10.0
OCMCampaignTask	Status	The status of the OCM campaign provided by OCM	10.0
OCMTargetTask		New table to store OCM Send Email task information for each target	10.0
OCMTargetTask	BouncedDate	The date the email failed to be delivered to the target.	10.0
OCMTargetTask	CampaignTargetId	Foreign key relationship to the CampaignTarget table	10.0
OCMTargetTask	Clicks	The number of times the target clicked a link in the email.	10.0
OCMTargetTask	CreateDate	The date the record was created.	10.0
OCMTargetTask	CreateUser	User who created the record.	10.0
OCMTargetTask	DeliveredDate	The date the email was delivered to the target.	10.0
OCMTargetTask	LastClickedDate	The date the email link was last clicked by the target	10.0
OCMTargetTask	LastViewedDate	The date the email was last viewed by the target	10.0
OCMTargetTask	ModifyDate	The date the record was last modified.	10.0
OCMTargetTask	ModifyUser	User who last modified the record	10.0
OCMTargetTask	OCMTargetTaskId	Primary key for the table	10.0
OCMTargetTask	SentDate	That date the email was sent to the target.	10.0
OCMTargetTask	Status	The current status of the email task for the target.	10.0
OCMTargetTask	UnsubscribedDate	The date the target unsubscribed from the email.	10.0
OCMTargetTask	Views	The number of times the target has viewed the email.	10.0
Opportunity	SeccodId	Is Nullable changed from True to False	0.0

Entity	Property	Description	Version
Opportunity	ErpPricingRequired	Boolean value identifying if ERP pricing is required.	10.0
OpportunityProduct	DocTotalCrmDiscountAmount	DocTotalCrmDiscountAmount represents the positive line total CRM-specific discount amount in the transaction currency.	10.0
OpportunityProduct	DocTotalDiscount	DocTotalDiscount represents the positive line total discount amount in the transaction currency.	10.0
OpportunityProduct	DocUnitCrmAdjustment	DocUnitCrmAdjustment provides the positive Unit CRM-based discount amount in the transaction currency.	10.0
OpportunityProduct	DocUnitErpAdjustment	DocUnitErpAdjustment provides the positive Unit CRM-based discount amount or a combined CRM and ERP-based discount amount in the transaction currency.	10.0
OpportunityProduct	LegacyDataConversionRequired	The new boolean property, LegacyDataConversionRequired, enables the identification of legacy records that still need to be processed through the conversion utility.	10.0
OpportunityProduct	LineType	Added to track zero priced products	9.1
OpportunityProduct	RequiredDeliveryDate	Contains the required delivery date for an opportunity line item, used to include in the ATP pricing request.	10.0
OpportunityProduct	TotalCrmDiscountAmount	TotalCrmDiscountAmount represents the positive line total CRM-specific discount amount in the CRM base currency.	10.0
OpportunityProduct	TotalDiscount	TotalDiscount represents the positive line total discount amount in the CRM base currency.	10.0
OpportunityProduct	UnitCrmAdjustment	New property provides the positive Unit CRM-based discount amount in the CRM base currency.	10.0
OpportunityProduct	UnitCrmAdjustmentPercent	New property provides a truncated, positive CRM-based discount percentage for display purposes.	10.0
OpportunityProduct	UnitCrmDiscountRate	New property contains a positive CRM-based discount percentage as a double value.	10.0

Entity	Property	Description	Version
OpportunityProduct	UnitErpAdjustment	New property provides the positive Unit CRM-based discount amount or a combined CRM and ERP-based discount amount in the CRM base currency.	10.0
OpportunityProduct	UnitErpAdjustmentPercent	New property provides a truncated, positive ERP-based discount percentage for display purposes.	10.0
PicklistAlias			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
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 last 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
QuoteItem	DocCalculatedPriceOutOnly	Outbound only, M3 specific price override based on DocCalculatedPrice to be published as part of the ProcessSalesOrder Bod	10.0
QuoteItem	DocTotalCrmDiscountAmount	Represents the positive line total CRM-specific discount amount in the transaction currency.	10.0
QuoteItem	DocTotalDiscount	Represents the positive line total discount amount in the transaction currency.	10.0

Entity	Property	Description	Version
QuoteItem	DocUnitCrmAdjustment	Provides the positive Unit CRM-based discount amount in the transaction currency.	10.0
QuoteItem	DocUnitErpAdjustment	Provides the positive Unit CRM-based discount amount or a combined CRM and ERP-based discount amount in the transaction currency.	10.0
QuoteItem	LegacyDataConversionRequired	New Boolean property enables the identification of legacy records that still need to be processed through the conversion utility.	10.0
QuoteItem	TotalCrmDiscountAmount	Represents the positive line total CRM-specific discount amount in the CRM base currency.	10.0
QuoteItem	TotalDiscount	Represents the positive line total discount amount in the CRM base currency.	10.0
QuoteItem	UnitCrmAdjustment	Provides the positive Unit CRM-based discount amount in the CRM base currency.	10.0
QuoteItem	UnitCrmAdjustmentPercent	Provides a truncated, positive CRM-based discount percentage for display purposes.	10.0
QuoteItem	UnitCrmDiscountRate	Contains a positive CRM-based discount percentage as a double value.	10.0
QuoteItem	UnitErpAdjustment	Provides the positive Unit CRM-based discount amount or a combined CRM and ERP-based discount amount in the CRM base currency.	10.0
QuoteItem	UnitErpAdjustmentPercent	Provides a truncated, positive ERP-based discount percentage or a combined CRM and ERP-based discount percentage for display purposes.	10.0
Return		Entity exposed to workflow	9.1
SalesOrderAddress	City	Changed column length from 32 to 64.	10.0
SalesOrderItem	DocCalculatedPriceOutOnly	Outbound only, M3 specific price override based on DocCalculatedPrice to be published as part of the ProcessSalesOrder Bod	10.0
SalesOrderItem	DocTotalCrmDiscountAmount	Represents the positive line total CRM-specific discount amount in the transaction currency.	10.0
SalesOrderItem	DocTotalDiscount	Represents the positive line total discount amount in the transaction currency.	10.0

Entity	Property	Description	Version
SalesOrderItem	DocUnitCrmAdjustment	Provides the positive Unit CRM-based discount amount in the transaction currency.	10.0
SalesOrderItem	DocUnitErpAdjustment	Provides the positive Unit ERP-based discount amount or a combined CRM and ERP-based discount amount in the transaction currency.	10.0
SalesOrderItem	LegacyDataConversionRequired	New Boolean property enables the identification of legacy records that still need to be processed through the conversion utility.	10.0
SalesOrderItem	TotalCrmDiscountAmount	Represents the positive line total CRM-specific discount amount in the CRM base currency.	10.0
SalesOrderItem	TotalDiscount	Represents the positive line total discount amount in the CRM base currency.	10.0
SalesOrderItem	UnitCrmAdjustment	Provides the positive Unit CRM-based discount amount in the CRM base currency.	10.0
SalesOrderItem	UnitCrmDiscountRate	Contains a positive CRM-based discount percentage as a double value.	10.0
SalesOrderItem	UnitErpAdjustment	Provides the positive Unit ERP-based discount amount or a combined CRM and ERP-based discount amount in the CRM base currency.	10.0
SalesOrderItem	UnitErpAdjustmentPercent	Provides a truncated, positive ERP-based discount percentage or a combined CRM and ERP-based discount percentage for display purposes.	10.0
SQLJOBDEFINITION		New table to store SQL job definitions created in Database Manager to be executed by the Job Server.	10.0
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

Entity	Property	Description	Version
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
TargetResponse	CampaignStageld	Foreign key relationship to CampaignStage	10.0
TargetResponse	CampaignTaskId	Foreign key relationship to CampaignTask	10.0
Ticket	ContactId	Exposed property	9.1
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 last 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

Entity	Property	Description	Version
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 authentication 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
UserWidgetPane		New table to hold user's default layouts for the widget panels.	10.0
UserWidgetPane	CreateUser	User who created the record	10.0
UserWidgetPane	CreateDate	The date the record was created	10.0
UserWidgetPane	ModifyUser	User who last modified the record	10.0
UserWidgetPane	ModifyDate	The date the record was last modified	10.0
UserWidgetPane	PluginName	Plugin name from the plugin table	10.0
UserWidgetPane	UserId	User's ID	10.0
UserWidgetPane	UserWidgetPanelId	Primary Key	10.0
UserWidgetPane	WidgetPanelId	Unique Id for the widget panel	10.0
WorkflowStep	TimeoutIncrement	Previously stored the timeout time increment, for example "days". This data has been moved to a new property 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 property 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 property StepData, a JSON string defining the step configuration.	9.1

Entity	Property	Description	Version
WorkflowStep	BCCEmailAddress	Previously stored the BCC email address for a Notification CRM workflow step. This data has been moved to a new property 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 property StepData, a JSON string defining the step configuration.	9.1
WorkflowStep	StepData	A new property 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 property 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 property 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 property StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	BCCEmailAddress	Previously stored the tokenized values from the workflow definition. This data has been moved to a new property 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 property 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 property StepData that stores all step instance specific configuration as JSON.	9.1

Entity	Property	Description	Version
WorkflowStepInstance	ApprovalCriteria	Previously stored the approval criteria for the workflow step. This data has been moved to a new property StepData that stores all step instance specific configuration as JSON.	9.1
WorkflowStepInstance	StepData	New property 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 Product.Product	M:1	Product	Set Expose to AI Summary attribute to True.	10.0
Account.AccountProducts	1:M	Account Product.Account	Set Expose to AI Summary attribute to True.	10.0
Account.ActivityAssociations	1:M	Activity Association.Account	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Account.AccountManager	M:1	User		9.4
			Set Expose to AI Summary attribute to True.	10.0
Account.Addresses	1:M	Address	Set Expose to AI Summary attribute to True.	10.0

Parent	Relationship	Child	Description	Version
Account.Contacts	1:M	Contact.Account	Set Expose to AI Summary attribute to True.	10.0
Account.Contracts	1:M	Contract.Account	Set Expose to AI Summary attribute to True.	10.0
Account.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4
			Set Expose to AI Summary attribute to True.	10.0
Account.ErpBuyerContact	M:1	Contact	Updated Expose to Workflow to True	9.4
Account.ErpInvoices	1:M	Invoice.Account	Set Expose to AI Summary attribute to True.	10.0
Account.ErpReceivables	1:M	Receivable.Account	Set Expose to AI Summary attribute to True.	10.0
Account.ErpShipments	1:M	Shipment.Account	Set Expose to AI Summary attribute to True.	10.0
Account.HistoryAssociations	1:M	History Association.Account	Set Expose to AI Summary attribute to True.	10.0
Account.LeadHistory	1:M	Lead History.Account	New relationship added for preserving information when a lead is converted to a contact and account.	10.0
Account.LeadSource	M:1	Lead Source	Set Expose to AI Summary attribute to True.	10.0
Account.Opportunities	1:M	Opportunity.Account	Set Expose to AI Summary attribute to True.	10.0
Account.Quotes	1:M	Quote.Account	Set Expose to AI Summary attribute to True.	10.0
Account.RegionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Account>Returns	1:M	Return.Account	Set Expose to AI Summary attribute to True.	10.0

Parent	Relationship	Child	Description	Version
Account.SalesOrders	1:M	Sales Order.Account	Set Expose to AI Summary attribute to True.	10.0
Account.Tickets	1:M	Ticket.Account	Set Expose to AI Summary attribute to True.	10.0
Activity.Leader	M:1	User	Set Expose to AI Summary attribute to True.	10.0
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.BackOffice	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 form 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
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

Parent	Relationship	Child	Description	Version
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
Campaign Stage.CampaignTargets	1:M	Campaign Target.CampaignStage	New relationship added for the tracking of an OCM campaign stage	10.0
Campaign Stage.CampaignTasks	1:M	Campaign Task.CampaignStage	Set Expose to AI Summary attribute to True.	10.0
Campaign Stage.LeadSource	M:1	Lead Source	Set Expose to AI Summary attribute to True.	10.0
Campaign Stage.TargetResponses	1:M	Target Response.CampaignStage	New relationship added for responses associated with a particular stage	10.0

Parent	Relationship	Child	Description	Version
Campaign Target.OCMTargetTask	1:M	OCM Target Task.CampaignTarget	New relationship added for OCM Email integration, maintains relationship with a target and OCM campaign task	10.0
Campaign Task.OCMCampaignTask	M:1	OCM Campaign Task.CampaignTask	New relationship added for OCM Email integration, maintains relationship with a task and OCM campaign task	10.0
Campaign Task.TargetResponses	1:M	Target Response.CampaignTask	New relationship between a task and target response	10.0
Campaign.AccountManager	M:1	User	Set Expose to AI Summary attribute to True.	10.0
Camapign.CampaignProducts	1:M	Campaign Product.Campaign	Set Expose to AI Summary attribute to True.	10.0
CampaignCampaignResponses	1:M	Target Response.Campaign	Set Expose to AI Summary attribute to True.	10.0
Campaign.CampaignStages	1:M	Campaign Stage.Campaign	Set Expose to AI Summary attribute to True.	10.0
Campaign.CampaignTargets	1:M	Campaign Target.Campaign	Set Expose to AI Summary attribute to True.	10.0
Campaign.CampaignTasks	1:M	Campaign Task.Campaign	Set Expose to AI Summary attribute to True.	10.0
Campaign.LeadHistory	1:M	Lead History.Campaign	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0
Campaign.LeadHistoryCampaigns	1:M	Lead History Campaign.Campaign	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0
Campaign.Opportunitites	1:M	Opportunity Campaign.Campaign	Set Expose to AI Summary attribute to True.	10.0

Parent	Relationship	Child	Description	Version
Campaign.Opportunity	M:1	Opportunity.Campaign	Set Expose to AI Summary attribute to True.	10.0
Campaign.Owner	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Contact.AccountManager	M:1	User	Set Expose to AI Summary attribute to True.	10.0
Contact.ActivityAssociations	1:M	Activity Association.Contact	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Contact.Addresses	1:M	Address	Set Expose to AI Summary attribute to True.	10.0
Contact.ContactMFAMethods	1:M	Contact MFA Method. Contact	Added in support of Multi-Factor Authentication	9.3
Contact.Contracts	1:M	Contract.Contact	Set Expose to AI Summary attribute to True.	10.0
Contact.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4
			Set Expose to AI Summary attribute to True.	10.0
Contact.HistoryAssociations	1:M	History Association.Contact	Set Expose to AI Summary attribute to True.	10.0
Contact.LeadHistoy	1:M	Lead History.Contact	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0
Contact.LeadSources	1:M	Contact Lead Source.Contact	Set Expose to AI Summary attribute to True.	10.0
Contact.Opportunities	1:M	Opportunity Contact.Contact	Set Expose to AI Summary attribute to True.	10.0
Contact.Owner	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0

Parent	Relationship	Child	Description	Version
Contact.Quotes	1:M	Quote.RequestedBy	Set Expose to AI Summary attribute to True.	10.0
Contact.RegionalManager	M:1	User	Set Expose to AI Summary attribute to True.	10.0
Contact.SalesOrders	1:M	Sales Order.RequestedBy	Set Expose to AI Summary attribute to True.	10.0
Contact.Tickets	1:M	Ticket.Contact	Set Expose to AI Summary attribute to True.	10.0
Contract.Incidents	1:M	Contract Incident.Contract	Set Expose to AI Summary attribute to True.	10.0
Contract.Items	1:M	Contract Item.Contract	Set Expose to AI Summary attribute to True.	10.0
Contract.Tickets	1:M	Ticket.Contract	Set Expose to AI Summary attribute to True.	10.0
Forecast Summary.OpportunityStateSummaries	1:M	Opportunity State Summary.View	Updated to resolve an issue with an incorrect guid reference to an invalid property.	10.0
Integration.AIProvider	M:1	AI Provider.Integration	New relationship added for Generative AI integration	10.0
Journey Instance Stage.CustomerJourneyInstanceSteps	1:M	Journey Instance Step.CustomerJourneyInstanceStage	Added in support of Customer Journey	9.2
Journey Instance.CustomerJourneyInstanceStages	1:M	Journey Instance Stage.CustomerJourneyInstance	Added in support of Customer Journey	9.2
Journey Stage.CustomerJourneySteps	1:M	Journey Step.CustomerJourneyStage	Added in support of Customer Journey	9.2
Journey.CustomerJourneyInstances	1:M	Customer Journey Instance.CustomerJourney	Added in support of Customer Journey	9.2
Journey.CustomerJourneyStages	1:M	Journey Stage.CustomerJourney	Added in support of Customer Journey Renamed in 9.4	9.2

Parent	Relationship	Child	Description	Version
Lead Capture Mapping.LeadCaptureMappingDetails	1:M	Lead Capture Mapping Detail.LeadCaptureMapping	Added in support of Lead Capture.	9.4
Lead.Addresses	1:M	Lead Address.Lead	Set Expose to AI Summary attribute to True.	10.0
Lead.History Associations	M:1	History Association.Lead	Set Expose to AI Summary attribute to True.	10.0
Lead.LeadSource	M:1	Lead Source	Set Expose to AI Summary attribute to True.	10.0
Lead.Owner	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Lead History.AccountManager	M:1	User	New relationship added for preserving information when a lead is converted to a contact and account.	10.0
LeadHistory.LeadHistoryCampaigns	1:M	Lead History Campaign.LeadHistory	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0
Lead Source.LeadHistory	1:M	Lead History.LeadSource	New relationship added for preserving information when a lead is converted to a contact and account.	10.0
Lead.AccountManager	M:1	User	Set Expose to AI Summary attribute to True.	10.0
Lead.ActivityAssociations	1:M	Activity Association.Lead	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Lead.LeadHistory	M:1	Lead History.Lead	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0

Parent	Relationship	Child	Description	Version
OCM Campaign Task.OCMTargetTasks	1:M	OCM Target Task.OCMCampaignTask	New relationship added for OCM Email Marketing integration	10.0
OCM Target Task View.Owner	M:1	Owner	New relationship added for OCM Email Marketing integration	10.0
Opportunity.ActivityAssociations	1:M	Activity Associatio.Opportunity	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Opportunity.Campaigns	1:M	Opportunity Campaign.Opportunity	Set Expose to AI Summary attribute to True.	10.0
Opportunity Contacts	1:M	Opportunity Contact.Opportunity	Set Expose to AI Summary attribute to True.	10.0
Opportunity.DivisionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Opportunity.HistoryAssociations	1:M	History Association.Opportunity	Set Expose to AI Summary attribute to True.	10.0
Opportunity.LeadHistory	1:M	Lead History.Opportunity	New relationship added for preserving Campaign information when a lead is converted to a contact and account.	10.0
Opportunity.LeadSource	M:1	Lead Source	Set Expose to AI Summary attribute to True.	10.0
Opportunity.Products	s1:M	Opportunity Product.Opportunity	Set Expose to AI Summary attribute to True.	10.0
Opportunity.RegionalManager	M:1	User	Updated Expose to Workflow to True	9.4
Owner	1:M	Account.Owner	Set Expose to AI Summary attribute to True.	10.0
Owner.BackOffices	1:M	Back Office.Owner	Relationship changed so that it is marked as required.	10.0

Parent	Relationship	Child	Description	Version
Owner.ERPBillTos	1:M	AccountBill To.Owner	Relationship changed so that it is marked as required	10.0
Owner.ErplInvoices	1:M	Invoice.Owner	Relationship changed so that it is marked as required	10.0
Owner.ERPPayFroms	1:M	Pay From.Owner	Relationship changed so that it is marked as required	10.0
Owner.ERPShipTos	1:M	Ship To.Owner	Relationship changed so that it is marked as required	10.0
Pay From.SalesOrders	1:M	Sales Order.ErpPayFrom	Updated Expose to Workflow to True	9.4
Product.CampaignProducts	1:M	Campaign Product.Product	Set Expose to AI Summary attribute to True.	10.0
Product.ErpReceivableItems	1:M	Receivable Item.Product	Set Expose to AI Summary attribute to True.	10.0
Product.Opportunities	1:M	Opportunity Product.Product	Set Expose to AI Summary attribute to True.	10.0
Product.QuoteItems	1:M	Quote Item.Product	Set Expose to AI Summary attribute to True.	10.0
Product.SalesOrderItems	1:M	Sales Order Item.Product	Set Expose to AI Summary attribute to True.	10.0
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
Quote.Owner	M:1	Owner	Relationship changed so that it is marked as required	10.0
Quote.QuoteItems	1:M	Quote Item.Quote	Set Expose to AI Summary attribute to True.	10.0
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

Parent	Relationship	Child	Description	Version
Sales Order.SalesOrderItems	1:M	Sales Order Item.SalesOrder	Set Expose to AI Summary attribute to True.	10.0
Sales Order.SODistributedTaxes	1:M	Discount Charge Item.SODistributedTax	Modified to include cascade deletes	9.2
Shipment Item.Product	M:1	Product	Set Expose to AI Summary attribute to True.	10.0
Ticket Activity Item.AccountProduct	M:1	Account Product	Set Expose to AI Summary attribute to True.	10.0
Ticket Activity.Items	1:M	Ticket Activity Item.TicketActivity	Set Expose to AI Summary attribute to True.	10.0
Ticket.AccountProducts	1:M	Ticket Account Product.Ticket	Set Expose to AI Summary attribute to True.	10.0
Ticket.ActivityAssociations	1:M	Activity Association.Ticket	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Ticket.AssignedTo	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Ticket.CompletedBy	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Ticket.ContractIncidents	1:M	Contract Incident.Ticket	Set Expose to AI Summary attribute to True.	10.0
Ticket.HistoryAssociations	1:M	History Association.Ticket	New relationship added for AI Summary integration. Set Expose to AI Summary attribute to True.	10.0
Ticket.Owner	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Ticket.ReceivedBy	M:1	Owner	Set Expose to AI Summary attribute to True.	10.0
Ticket>Returns	1:M	Return.Ticket	Set Expose to AI Summary attribute to True.	10.0

Parent	Relationship	Child	Description	Version
Ticket.TicketActivities	1:M	Ticket Activity.Ticket	Set Expose to AI Summary attribute to True.	10.0
Ticket.TicketDefects	1:M	Defect Ticket.Ticket	Set Expose to AI Summary attribute to True.	10.0
Ticket.TicketHistory	1:M	Ticket History.Ticket	Set Expose to AI Summary attribute to True.	10.0
User.UserMFAMethods	1:M	User MFA Method.User	Added in support of Multi-Factor Authentication	9.3
Ticket.Urgency	M:1	Urgency	Set Expose to AI Summary attribute to True.	10.0
User.UserWidgetPanels	1:M	UserWidgetPane.User	New relationship to support widget panels with user-specific layouts.	10.0
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

The following views added or updated since v9.0.

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	Version
SQLJOBDEFINITION		New table to store SQL job definitions created in Database Manager to be executed by the Job Server.	10.0
SQLJOBDEFINITION	SQLJOBDEFINITIONID	Primary key for the table	10.0
SQLJOBDEFINITION	CREATEUSER	User who created the record	10.0
SQLJOBDEFINITION	CREATEDATE	The date the record was created	10.0
SQLJOBDEFINITION	MODIFYUSER	User who last modified the record	10.0
SQLJOBDEFINITION	MODIFYDATE	The date the record was last modified.	10.0
SQLJOBDEFINITION	LASTRAN	The date the job was last executed.	10.0
SQLJOBDEFINITION	NAME	The name that is displayed in the Job Manager.	10.0
SQLJOBDEFINITION	DESCRIPTION	A brief description of the job.	10.0
SQLJOBDEFINITION	QUERY	The SQL query to perform. Valid options: <ul style="list-style-type: none"> ▪ SELECT ▪ INSERT ▪ UPDATE ▪ DELETE ▪ TRUNCATE 	10.0
SQLJOBDEFINITION	CRONEXPRESSION	Stores the job schedule frequency definition.	10.0
SQLJOBDEFINITION	STARTTIME	The date and time the job is scheduled to run for the first time.	10.0
SQLJOBDEFINITION	ENDTIME	The date and time after which the job should no longer be run.	10.0

Table	Property/Field	Description	Version
SQLJOBDEFINITION	ENABLED	Flag indicating if the job definition is available to run as a job.	10.0
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
AINEWSFEED	Inserted records for each of the AI providers available for Generative AI .	10.0
AIPROVIDER	Inserted records for each of the newsfeed providers available for AI newsfeeds.	10.0
AISUMMARYDEFINITION	Inserted summary definition records for each of the entities available for AI Summary.	10.0
CALCULATEDFIELDDATA	Added new LeadHistory calculated field LeadNameLastFirst	10.0
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
INDEXSCHEDULE	Updated index schedule records for changes to Ticket, Customer Ticket (INFORCRM-32264), and Notes (INFORCRM-30135).	9.4
INTEGRATION	Updated record for Sync for Exchange change. (INFORCRM-32907)	9.4
INTEGRATIONRESOURCE	Updated record for Sync for Exchange change. (INFORCRM-32907)	9.4
JOINDATA	Added to fix INFORCRM-29851	10.0
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
RESYNCTABLEDEFS	Updated to insert records for new tables.	10.0
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

Scripts

None added since 9.0

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	ForecastSummary	Country	10.0
Saleslogix Application Entities	Opportunity	Stage	10.0
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
Saleslogix SpeedSearch Support	IndexDefinition	Enabled	9.4
Saleslogix SpeedSearch Support	IndexDefinition	Name	9.4
Saleslogix SpeedSearch Support	IndexDefinition	PublicAccess	9.4
Saleslogix SpeedSearch Support	IndexDefinition	Secured	9.4
Saleslogix SpeedSearch Support	IndexSchedule	Enabled	9.4
Saleslogix SpeedSearch Support	IndexSchedule	IndexName	9.4
Saleslogix SpeedSearch Support	IndexSchedule	ScheduleType	9.4
Saleslogix System Support	ReleasePlugin	Company	9.3
Saleslogix System Support	ReleasePlugin	CreateDate	9.3
Saleslogix System Support	ReleasePlugin	CreateUser	9.3
Saleslogix System Support	ReleasePlugin	Family	9.3
Saleslogix System Support	ReleasePlugin	Name	9.3
Saleslogix System Support	ReleasePlugin	ReadOnly	9.3
Saleslogix System Support	ReleasePlugin	Released	9.3

Create Indexes

The following lists indexes added since in v9.0.

Index Name	Version
ADMINROLES.ADMINROLES_SECCODEID	9.2
AISUMMARY.AISUMMARY_ENTITYID	10.0
AISUMMAR.AISUMMARY.ENTITYTYPE_ENTITYID	10.0
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
CALCULATEDFIELDDETA.CALCULATEDFIELDDETA_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
CUSTOMERJOURNEYSTAGEPROPERTY.CUSTOMERJOURNEYSTAGEPROPERTY_CUSTOMERJOURNEYSTAGEID	10.0
CUSTOMERJOURNEYINSSTAGEPROP.CUSTOMERJOURNEYINSSTAGEPROP_CUSTOMERJOURNEYINSTANCESSAGEID	10.0
DISCOUNTCHARGEITEM.DISCOUNTCHARGEITEM_SECCODEID	9.2
DISCOUNTCHARGEITEM.DISTRIBUTEDTAXQUOTEID_IDX	10.0
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

Index Name	Version
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
QUOTESUBITEM.QUOTEITEMID_IDX	10.0
REPORTFILTER.REPORTFILTER_SECCODEID	9.2
REPORTHISTORY.REPORTHISTORY_SECCODEID	9.2
RMA.RMA_SECCODEID	9.2
SALESORDER.SALESORDER_CREATEDATE	9.4
SALESORDER.SALESORDER_GRANDTOTAL.	9.4
SALESORDER.SALESORDER_SECCODEID	9.2
SALESORDER.SALESORDER_STATUS	9.4
SYNCRESLT.SYNCRESLT_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	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	AINewsFeed	OnBeforeUpdate	10.0
Saleslogix Application Entities	CustomerJourney	OnBeforeInsert	9.2
Saleslogix Application Entities	CustomerJourneyInstance	OnAfterInsert	10.0
Saleslogix Application Entities	CustomerJourneyInstanceStage	OnBeforeUpdate	9.2
Saleslogix Application Entities	CustomerJourneyStage	OnAfterDelete	9.2
Saleslogix Application Entities	CustomerJourneyStage	OnBeforeInsert	9.4
Saleslogix Application Entities	CustomerJourneyStep	OnAfterDelete	9.2
Saleslogix Application Entities	DiscountChargeItem	OnBeforeDelete	9.3
Saleslogix Application Entities	LeadCaptureMapping	OnAfterInsert	9.4
Saleslogix Application Entities	LeadCaptureMapping	OnBeforeInsert	9.4
Saleslogix Application Entities	LeadCaptureMapping	OnCreate	9.4
Saleslogix Application Entities	LeadHistoryCampaign	OnAfterInsert	10.0
Saleslogix Application Entities	LeadSource	OnBeforeDelete	9.1
Saleslogix Application Entities	ProductPart	OnBeforeInsert	9.1
Saleslogix Application Entities	ProductPart	OnCreate	9.1
Saleslogix Contract Sync Entities	AppldMapping	OnAfterInsert	9.4
Saleslogix Security Support	ContactMFAMethod	OnBeforeInsert	9.3
Saleslogix Security Support	ContactMFAMethod	OnBeforeUpdate	9.3
Saleslogix Security Support	UserMFAMethod	OnBeforeInsert	9.3
Saleslogix Security Support	UserMFAMethod	OnBeforeUpdate	9.3
Saleslogix SpeedSearch Support	IndexDefinition	OnBeforeDelete	9.4
Saleslogix System Support	ReleasePlugin	OnBeforeDelete	9.3

Business Rules

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

Package	Entity	Business Rule	Version
Saleslogix Activity Support	Activity	IsSyncOnlyNewCRMCalendarItems	9.1
Saleslogix Activity Support	History	SetEntityDetailsToSession	9.1
Saleslogix Application Entities	Account	CreateAccount	10.0
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	UpdateOpportunitiesMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateQuotesMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateSalesOrdersMatchingAccountManager	9.3
Saleslogix Application Entities	Account	UpdateWebAddressChanges	9.3
Saleslogix Application Entities	Address	GetFullAddress	9.1
Saleslogix Application Entities	AISummaryDefinition	GetSummaryDefinition	10.0
Saleslogix Application Entities	Campaign	CreateCampaign	10.0
Saleslogix Application Entities	CampaignTask	RequestOCMEMailCampaignReportUrl	10.0
Saleslogix Application Entities	CampaignTask	RequestOCMEMailContentEditorUrl	10.0
Saleslogix Application Entities	CampaignTask	RequestOCMEMailContentMasterUrl	10.0
Saleslogix Application Entities	CampaignTask	RequestOCMCampaignTaskI	10.0
Saleslogix Application Entities	Contact	CreateContact	10.0

Package	Entity	Business Rule	Version
Saleslogix Application Entities	Contact	GetContactMFADevices	9.3
Saleslogix Application Entities	Contact	MergeContact	10.0
Saleslogix Application Entities	Contact	MoveContact	9.2
Saleslogix Application Entities	Contact	ResetContactMFADevices	9.3
Saleslogix Application Entities	Contact	SaveContact	9.4
Saleslogix Application Entities	Contract	CreateContract	10.0
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	CreateCustomerJourneyStageProperties	10.0
Saleslogix Application Entities	CustomerJourneyStage	MoveStageDown	9.2

Package	Entity	Business Rule	Version
Saleslogix Application Entities	CustomerJourneyStage	MoveStageUp	9.2
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	Forecast	CreateForecast	10.0
Saleslogix Application Entities	Integration	ClearIntegrationModuleCache	10.0
Saleslogix Application Entities	Integration	KillSLXJobServer	10.0
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	CreateLead	10.0
Saleslogix Application Entities	Lead	ManualMergeLeadWithLead	9.2
Saleslogix Application Entities	Opportunity	CreateOpportunity	10.0
Saleslogix Application Entities	Opportunity	OnAddLineItem	10.0
Saleslogix Application Entities	Opportunity	ReAssignLineNumbers	10.0

Package	Entity	Business Rule	Version
Saleslogix Application Entities	Opportunity	RefreshPricing	9.2
Saleslogix Application Entities	OpportunityProduct	CalculatePriceChanges	10.0
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	OpportunityProduct	SetCrmDocCalculatedPriceOnChange	10.0
Saleslogix Application Entities	OpportunityProduct	SetCrmDocTotalDiscountOnChange	10.0
Saleslogix Application Entities	OpportunityProduct	SetDocUnitErpAdjustmentPercentOnChange	10.0
Saleslogix Application Entities	OpportunityProduct	SetUnitCrmAdjustmentPercentOnChange	10.0
Saleslogix Application Entities	Product	CreateProduct	10.0
Saleslogix Application Entities	ProductPart	ReOrderDownLineNumbers	9.1
Saleslogix Application Entities	ProductPart	ReOrderUpLineNumbers	9.1
Saleslogix Application Entities	Quote	CreateQuote	10.0
Saleslogix Application Entities	Quote	OnAddLineItem	10.0
Saleslogix Application Entities	Quote	RefreshPricing	9.2
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	SetCrmDocCalculatedPriceOnChange	10.0
Saleslogix Application Entities	QuoteItem	SetCrmDocTotalDiscountOnChange	10.0
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	OnAddLine	10.0
Saleslogix Application Entities	SalesOrder	RefreshPricing	9.2

Package	Entity	Business Rule	Version
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	SetCrmDocCalculatedPriceOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetCrmDocTotalDiscountOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocTotalDiscountOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentOnChange	9.2
Saleslogix Application Entities	SalesOrderItem	SetDocUnitErpAdjustmentPercentOnChange	9.2
Saleslogix Application Entities	Ticket	CreateTicket	10.0
Saleslogix Security Support	OwnerSecurityProfile	DeleteProfile	10.0
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 System Support	ApplicationBuilderRequest	AddPortals	9.4
Saleslogix System Support	ApplicationBuilderRequest	ClearDeploymentFolder	9.4
Saleslogix System Support	ApplicationBuilderRequest	DeletePortal	9.4
Saleslogix System Support	ApplicationBuilderRequest	DeployAllPortals	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortal	9.1
Saleslogix System Support	ApplicationBuilderRequest	DeployPortalByInstanceId	9.1
Saleslogix System Support	ApplicationBuilderRequest	GenerateEmlRequest	9.1
Saleslogix System Support	ApplicationBuilderRequest	GetAllPortals	9.4
Saleslogix System Support	ApplicationBuilderRequest	GetBundles	9.1

Package	Entity	Business Rule	Version
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	ApplicationBuilderRequest	UpdatePortal	9.4
Saleslogix System Support	License	AddLicense	9.2
Saleslogix System Support	OfficeProfile	GetDomains	9.3
Saleslogix System Support	OfficeProfile	GetSystemSummaryReport	9.3
Saleslogix System Support	OfficeProfile	UpdateLocaleConfig	10.0
Saleslogix System Support	ReleasePlugin	GetReleaseOwners	9.3
Saleslogix System Support	ReleasePlugin	Release	9.3
Saleslogix System Support	ReleasePlugin	Unrelease	9.3

Code Snippet files

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

Package	Entity	Property	Code Snippet	Description	Version
Saleslogix Application Entities	Address	FullAddress	GetFullAddress		0.0
Saleslogix Application Entities	AISummaryDefinition		GetSummaryDefinition	Added for Generative AI intgration	10.0
Saleslogix Application Entities	Campaign		CreateCampaign	Updated to preserve campaign information for the lead history of a converted lead.	10.0

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 SalesOrderAddress City Column (MSSQL)	10.0
Alter SalesOrderAddress City Column (Oracle)	10.0
Alter SalesOrderAddressState Column (MSSQL)	10.0
Alter SalesOrderAddress State Column (Oracle)	10.0
Alter_VFS_Delete_Triggers (MSSQL)	9.4
CleanDuplicatePicklists (All)	9.2
Clear Broken Address Relationships (MSSQL)	9.4
Create_HistLead_LeadNameLastFirst(Oracle)	10.0
Create_HistLead_LeadNameLastFirst(MSSQL)	10.0
Create_OCMTargetTaskView(MSSQL)	10.0
Create_OCMTargetTaskView(Oracle)	10.0
CreateNew_CalculatedFieldData_Schema (MSSQL)	9.1
CreateNew_CalculatedFieldData_Schema (Oracle)	9.1
Delete_CurrencyConfiguration (All)	9.3
Delete_Obsolote_SyncHistoryForms(All)	9.1
Delete_Obsolote_SyncHistoryForms (MSSQL)	10.0
Delete_Obsolote_SyncHistoryForms (Oracle)	10.0
Delete_Obsolote_Reporting_Tables (MSSQL)	10.0
Delete_Obsolote_Reporting_Tables (Oracle)	10.0
Delete_Reporting_QrtzTables (Oracle)	10.0
Delete_Reporting_Qrtz_Tables (MSSQL)	10.0
Drop ION Workflow deprecated custom setting (All)	10.0
Drop Outbound Retry Count custom setting (All)	9.4

Database Object	Version
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(Oracle)	9.4
Update_CampaignTargets_View (MSSQL)	10.0
Update_CampaignTargets_View (Oracle)	10.0
Update_CRMWorkflow_BOEXT_CONT_Version (All)	9.4
Update_CRMWorkflow_Version (All)	9.3
Update_EmailAddress_Columns(Oracle)	10.0
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
(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

Plugin Name	Version
[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:AllPlugins (Infor 9.3)	9.3
[Group] PLUGIN:AllPlugins (Infor 10)	10.0
[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:MailMergeTemplates (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:Active CRM Workflows (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:Active CRM Workflows (Infor 9.3)	10.0
[Group] WORKFLOWINSTANCE:All CRM Workflows (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:All CRM Workflows (Infor 10)	10.0
[Group] WORKFLOWINSTANCE:My CRM Workflows (Infor 9.3)	9.3
[Group] WORKFLOWINSTANCE:My CRM Workflows (Infor 10)	10.0
[Group] WORKFLOWINSTANCE:All CRM Workflows (Infor 9.3)	9.3
Menus System: Standard Menus)	9.4
[ResponsiveDashboardPage] System:My Dashboard (Infor 9.1)	9.1
[ResponsiveDashboardPage] System:My Dashboard (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] ACCOUNT:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] CONTRACT:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] ERPINVOICE:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] OPPORTUNITY:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] QUOTE:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] RMA:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] SALESORDER:ListKPIs (Infor 10)	10.0
[ResponsiveDashboardListWidgetPane] TICKET:ListKPIs (Infor 10)	10.0
(Scripts, VBscript System:Notes History Common)	9.1
(Scripts, VBscript System:SLX Lead Support)	9.2
(Scripts, VBscript System:SP_SalesProcessFunctions)	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
PAType	Added M3RestfulJSON item	10.0
Reason Lost	Added pick list item	9.1
TargetStatus	Updated to include OCM Marketing items for the OCM Email Marketing integration	10.0

Windows Forms

None added since 9.0

Web Forms

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

Package	Entity	Form Name	Description	Version
Saleslogix Activity Support	ResourceList	ResourceDetail		10.0
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	Account	AccountErpDetails		9.1

Package	Entity	Form Name	Description	Version
Application Entities				
Saleslogix Application Entities	Account	AccountExtendedDetails	Added ClosedDate and ReasonLost fields (INFORCRM-29132)	9.1
Saleslogix Application Entities	Account	AccountLeadsHistory	New form added to preserve lead conversion information (INFORCRM-33072)	10.0
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	AINewsFeed	AddEditNewFeed	Added to support AI Newsfeeds for Generative AI	10.0
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	BackOfficeDetails		10.0
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	9.2

Package	Entity	Form Name	Description	Version
			INFORCRM-30446)	
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	BOEPAMapping	AddEditBOEPAService		10.0
Saleslogix Application Entities	Campaign	CampaignDetails		10.0
Saleslogix Application Entities	Contact	ContactDetails	Updated label from "Dear" to "Salutation" (INFORCRM-12127)	9.4
			Checkbox alignment issues (INFORCRM-34151)	10.0
Saleslogix Application Entities	Contact	ContactLeadsHistory	New form added to preserve lead conversion information (INFORCRM-33071)	10.0
Saleslogix Application Entities	Contract	ContractComments	Added tooltip to Save button. (INFORCRM-30823)	9.3
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

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	CustomerJourneyStep	CopyStep	New form for copying a customer journey step.	9.2
Saleslogix Application Entities	Defect	DefectComments	Expanded the size of the Comments control. (INFOCRM-33690)	10.0
Saleslogix Application Entities	Defect	DefectDetails	Description Use Date Stamp icon was moved above (INFOCRM-28556).	9.2
			Expanded the size of the Description and Resolution controls. (INFOCRM-33690)	10.0
Saleslogix Application Entities	Defect	InsertDefect	Comment Use Date Stamp icon was moved above (INFOCRM-28556)	9.2
Saleslogix Application Entities	EmailTemplate	EmailTemplateDetails		10.0
Saleslogix Application Entities	EmailTemplate	EmailTemplateProperties	Column heading changed" PickList Name" to "Pick List Name" (INFOCRM-29059)	9.1
Saleslogix Application Entities	ERPBillTo	ErpBillToDetails		9.3
Saleslogix Application Entities	ErpInvoice	ErpInvoiceDiscountChargeItems	Updated to be read-only (INFOCRM-33906)	10.0
Saleslogix Application Entities	ErpInvoiceItem	InvoiceItemDetail		10.0
Saleslogix Application Entities	ERPPayFrom	ErpPayFromDetails	Integrated account/Ship To/Bill To records gets hard deleted even the Delete behavior set to Soft (INFOCRM-29919)	9.3
Saleslogix Application Entities	ERPPerson	ErpPersonDetails	ErpShipTo content fails due to optimistic locking failure on ErpCustomerType picklist content. (INFOCRM-30933)	9.3
Saleslogix Application Entities	ERPShipment	ErpShipmentDetails	Checkbox alignment issues (INFOCRM-34151)	10.0
Saleslogix Application Entities	ERPShipment	ErpShipmentItemDetails	Close button moved to the bottom of the dialog box. (INFOCRM-34152)	10.0

Package	Entity	Form Name	Description	Version
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-30848)	9.4
Saleslogix Application Entities	Forecast	ForecastOpportunities	Updated the Refresh icon. (INFORCRM-23875)	10.0
Saleslogix Application Entities	Forecast	ForecastWorksheet	Updated the Refresh icon. (INFORCRM-23875)	10.0
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	AllIntegrationDetails	Added for Generative AI integration	10.0
Saleslogix Application Entities	Integration	AINewsfeeds	Added for Generative AI integration	10.0
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	IntegrationExtendedDetails		10.0
Saleslogix Application Entities	Integration	IntegrationIONWorkFlows		9.1
Saleslogix Application Entities	Integration	NormalizeEntities	Form resized due to font size change (INFORCRM-27876).	9.4
Saleslogix Application Entities	Integration	OCMIntegrationDetails	Added for OCM EMail Marketing integration	10.0

Package	Entity	Form Name	Description	Version
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 horizontal 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	IONWorkflowMapping	InsertIONWorkflowMapping		10.0
Saleslogix Application Entities	IONWorkflowMapping	IONWorkflowMappingDetails		10.0
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
Saleslogix Application Entities	LeadCaptureConfiguration	LeadCaptureConfigurationDetail	Added for Lead Capture	9.4
Saleslogix Application Entities	LeadCapturMapping	InsertLeadCaptureMapping	Added for Lead Capture	9.4
Saleslogix Application Entities	LeadCaptureMapping	LeadCaptureMappingDetail	Added for Lead Capture	9.4
Saleslogix Application Entities	LeadCaptureMapping	LeadCaptureMappingItemDetails	Added for Lead Capture	9.4

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	LeadCaptureMapping	LeadCaptureMappings	Added for Lead Capture	9.4
Saleslogix Application Entities	LeadCaptureMappingDetail	LeadCapturePropertyMappingEdit	Added for Lead Capture	9.4
Saleslogix Application Entities	LeadCaptureMapping	LeadCapturePropertyMappingInsert	Added for Lead Capture	9.4
Saleslogix Application Entities	Opportunity	EditSalesPotential		10.0
Saleslogix Application Entities	Opportunity	InsertOpportunity	Changed Lead Source from a lookup to a pick list (INFORCRM-29107)	9.1
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	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	OpportunityDetails		9.2
Saleslogix Application Entities	Opportunity	OpportunityLeadsHistory	New form added to preserve lead conversion information (INFORCRM-33073)	10.0
Saleslogix Application Entities	Opportunity	OpportunityProducts	Added the Bundle column (INFORCRM-29789) Added toolbar buttons to reorder products. (INFORCRM-15511)	9.1
Saleslogix Application	Opportunity	OpportunityProducts		9.2

Package	Entity	Form Name	Description	Version
Entities				
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
			Checkbox alignment issues (INFORCRM-34151)	10.0
Saleslogix Application Entities	Product	ProductErpDetails		10.0
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 Application Entities	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	QuoteDiscountChargeItems	Updated to be read-only INFORCRM-33906	10.0
Saleslogix Application Entities	Quote	EditQuoteDetail	Fixed error loading the SmartParts/Quote/EditQuoteDetail.ascx (INFORCRM-32378)	9.4
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	9.4

Package	Entity	Form Name	Description	Version
			Expiration Date (INFORCRM-29004)	
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 (INFORCRM-32005)	9.3
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

Package	Entity	Form Name	Description	Version
Saleslogix Application Entities	Return	ReturnComments	Expanded the size of the Comments field. (INFORCRM-33690)	10.0
Saleslogix Application Entities	Return	ReturnDetails		10.0
Saleslogix Application Entities	Return	ReturnExtendedDetails	Expanded the size of the Notes control. (INFORCRM-33690)	10.0
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 Expiration Date (INFORCRM-29004)	9.1
Saleslogix Application Entities	SalesOrder	SalesOrderDiscountCharges	Updated for IsLock business rule to prevent updates if a sales order status is if the status is "Pending Approval". (INFORCRM-32914)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderDiscountCharges	Updated to be read-only INFORCRM-33906	10.0
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
Saleslogix Application Entities	SalesOrder	SalesOrderPayFrom	Fixed border for lookup fields (INFORCRM-32690) Fixed border for lookup fields (INFORCRM-32690)	9.4
Saleslogix Application	SalesOrder	SalesOrderProducts	Added the Bundle column (INFORCRM-29789)	9.1

Package	Entity	Form Name	Description	Version
Entities			Added toolbar buttons to reorder products. (INFORCRM-15511)	
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)	9.4
Saleslogix Application Entities	SalesOrder	SalesOrderSoldTo	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	TicketComments	Expanded the size of the Comments control. (INFORCRM-33690)	9.2
Saleslogix Application Entities	Ticket	TicketDetails		9.2
Saleslogix Application Entities	Ticket	TicketExtendedDetails		9.2
			Expanded the size of the Description and Resolution fields. (INFORCRM-33690)	10.0
Saleslogix Application Entities	Ticket	TicketHistory		10.0
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	Urgency	InsertUrgency	New form for managing Urgencies (INFORCRM-30887)	9.3

Package	Entity	Form Name	Description	Version
Entities				
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	WorkflowStepReviewerInstance	AddApproversOrObserver	Updated to remove debugger statements (INFORCRM-31665)	9.4
Saleslogix Contract Sync Entities	Sync Result	SyncResults		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	User	LoggedInUsers	New form to view logged in users. (INFORCRM-29276)	9.2
Saleslogix Security Support	User	UserDetails	Added new method to support Deployment Manager	9.1
Saleslogix Security Support	User	UserErpDetails	Added new method to support Deployment Manager	9.1
Saleslogix Security Support	User	UserSecurity	Updated for resetting a user's multi-factor authentication devices.	9.3
Saleslogix Security Support	User	UserSummaryView		10.0
Saleslogix	ApplicationBuilderReque	AddPortals	Added for Deployment Manager	9.4

Package	Entity	Form Name	Description	Version
System Support	st			
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
			Form change to add Urgency (INFORCRM-30887) and Customer Portal Web Access user management. (INFORCRM-30904)	9.3
Saleslogix System	OfficeProfile	TicketAutoAssignment	New form for Ticket Auto Assignment (INFORCRM-	9.2

Package	Entity	Form Name	Description	Version
Support			27981)	
Saleslogix System Support	ReleasePlugin	ReleasePluginDetails		9.3
Saleslogix System Support	ReleasePlugin	ReleasePluginList		9.3

Quick Forms

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

Form Name	Version
QFControlsList (Control Rendering Template)	10.0
QFDataGrid (Control Rendering Template)	9.4
QFDateTimePicker (Control Rendering Template)	9.1
QFSDDataGrid (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
QFSLXPhone (Control Rendering Template)	10.0
QFSLXSDDataLookup (Control Rendering Template)	9.3
QFSLXTimeZone (Control Rendering Template)	9.1
QFSLXUrl (Control Rendering Template)	9.1
QFSLXUser (Control Rendering Template)	9.1
QFSLXWidget Panel (Control Rendering Template)	10.0
Rendering Provider Configuration	10.0
Web Form Template	10.0

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	AccountLeadsHistory	10.0
SlxClient	Account Detail	AINewsfeed	10.0

Portal	Page	SmartPart	Version
SlxClient	Account Detail	AISummaryDetails	10.0
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	Activity Groups	LiveGroupViewer (Custom)	10.0
SlxClient	Back Office Detail	AddEditBOEPAService	9.2
SlxClient	Bill To Details	AddEditERPPayFrom	9.2
SlxClient	Bill To Details	SyncResults	9.1
SlxClient	CampaignDetail	AI Summary Details (Custom)	10.0
SlxClient	CampaignDetail	CampaignTargetTasks (Custom)	10.0
SlxClient	Contact Detail	AddEditContactLeadSource	9.2
SlxClient	ContactDetail	AI Summary Details (Custom)	10.0
SlxClient	Contact Detail	ContactCard	9.1
SlxClient	ContactDetail	ContactLeadsHistory	10.0
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	Journey Detail	AddEditStage	9.2
SlxClient	Journey Detail	CopyStage	9.2
SlxClient	Journey Detail	CopyStep	9.2
SlxClient	Journey Detail	CustomerJourneyDetails	9.2
SlxClient	Journey Detail	InsertCustomerJourney	9.2
SlxClient	Journey Detail	JourneyStagesSteps (Custom)	9.2
SlxClient	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

Portal	Page	SmartPart	Version
SlxClient	Events	LiveGroupViewer (Custom)	10.0
SlxClient	Forecast Summary	LiveGroupViewer (Custom)	10.0
SlxClient	History Groups	LiveGroupViewer (Custom)	9.1
SlxClient	ImportLead	ImportLeadsWizard (Custom)	10.0
SlxClient	Insert Journey	InsertCustomerJourney	9.2
SlxClient	Integration Detail	AddEditLink	9.2
SlxClient	Integration Detail	AddEditNewsFeed	10.0
SlxClient	Integration Detail	AllIntegrationDetails	10.0
SlxClient	Integration Detail	AINewsFeeds	10.0
SlxClient	Integration Detail	AISummaryDefinitions	10.0
SlxClient	Integration Detail	IntegrationContourAbout	9.2
SlxClient	Integration Detail	OCMIntegrationDetails	10.0
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
SlxClient	Opportunity Detail	OpportunityLeadsHistory	10.0

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	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	AISummaryDetails (Custom)	10.0
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
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.GroupViewerModule	9.1
SlxClient	Customer Journey Detail	Pages Customer Journey Detail Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	9.2
SlxClient	Modules	Modules	Sage.SalesLogix.Web.Modules.DeveloperToolsModule	9.1
SlxClient	Plugin Manager	Pages Plugin Manager Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	9.3
SlxClient	Release Plugin	Pages Release Plugin Modules	Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule	9.3

Menus

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

Portal	Menu	Menu Item	Version
SlxClient	Administration		9.1
		New Custom Setting	10.0
		New Journey	9.2
		Sync History	9.2
SlxClient	Developer Tools		9.1
		Deploy	9.1
		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	Lead Capture	9.4
SlxClient	Administration	Journeys	9.2
SlxClient	Administration	Database Manager	9.3
SlxClient	Administration	Custom Settings	9.2
SlxClient	Administration	Entity Manager	9.2
SlxClient	Administration	Plugin Manager	9.3
SlxClient	Administration	SpeedSearch Manager	9.3
SlxClient	Marketing	History	9.1
SlxClient	Sales	History	9.1
SlxClient	Service	History	9.1
SlxClient	Support	History	9.1

Context Menus

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

Portal	Context Menu	Menu Item	Version
SlxClient	Journey	Create New Group	9.2
SlxClient	Journey	Lookup Journey	9.2
SlxClient	Journey	New 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

Configuration Files

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

Portal	Location	Filename	Description	Version
SData	SupportFiles	appSettings.config	<ul style="list-style-type: none"> Added RequestQueueLimitPerSession Added AllowConcurrentRequestsPerSession 	10.0
SData	SupportFiles	Web.config	<ul style="list-style-type: none"> Binding Redirect added for: System.Runtime.CompilerServices.Unsafe Added reference to ApplicationBuilder service for downloadable Application Architect. 	9.1
SData	SupportFiles	Web.config	<ul style="list-style-type: none"> Binding Redirect added for System.Formats.Asn 1 	9.3
SData	SupportFiles	web.config	<ul style="list-style-type: none"> Updated to replace the existing CodeDOM providers with the Microsoft.CodeDom.Providers.DotNetCompilerPlatform 	9.4
SData	SupportFiles	web.config	<ul style="list-style-type: none"> Added or updated to support Asynchronous Session State: <ul style="list-style-type: none"> customProvider - SqlSessionStateProviderAsync configSource - connectionStrings.config Session = <remove name="Session" /> <add name="Session" type="Microsoft.AspNet.SessionState.SessionStateModuleAsync, Microsoft.AspNet.SessionState.SessionStateModule.Version=1.1.0.0, Culture=neutral" /> <add name="Session" type="System.Web.SessionState.SessionStateModule" /> Added or updated to support Generative AI integration <ul style="list-style-type: none"> ai/* - <add verb="*" path="ai/*" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" /> AiServiceHandler <add name="AiServiceHandler" preCondition="integratedMode" verb="*" path="ai/*" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" resourceType="Unspecified" /> AiServiceHandler.ashx - add verb="*" path="AiServiceHandler.ashx" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" /> 	10.0

Portal	Location	Filename	Description	Version
			<ul style="list-style-type: none"> ▪ AiServiceHandler - <add name="AiServiceHandler" preCondition="integratedMode" verb="" path="AiServiceHandler.ashx" type="Saleslogix.AI.Handler.AIHttpHandler, Saleslogix.AI.Handler" resourceType="Unspecified" /> 	
SDataCustomer	SupportFiles	Web.config	<ul style="list-style-type: none"> ▪ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ▪ Binding Redirect added for System.Formats.Asn 1 	9.3
SData Integration Host	SupportFiles	Web.config	<ul style="list-style-type: none"> ▪ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ▪ Added reference to ApplicationBuilder service for downloadable Application Architect. 	9.1
SlxClient	SupportFiles	appSettings.config	<ul style="list-style-type: none"> ▪ Updated for storing password hashes. (INFORCRM-30619) 	9.2
SlxClient	SupportFiles	appSettings.config	<ul style="list-style-type: none"> ▪ Help Domain URL updated for 10.0 ▪ Added RequestQueueLimitPerSession = 21474836 ▪ Added AllowConcurrentRequestsPerSession = true 	10.0
SlxClient	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe ▪ Added reference to ApplicationBuilder service for downloadable Application Architect. 	9.1
SlxClient	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ Updated to allow authentication for the static content to be bypassed. 	9.2
SlxClient	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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
SlxClient	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ Added or updated to support Asynchronous Session State: <ul style="list-style-type: none"> ▪ customProvider - SqlSessionStateProviderAsync 	10.0

Portal	Location	Filename	Description	Version
			<ul style="list-style-type: none"> ▪ configSource - connectionStrings.config Session = <remove name="Session" /> ▪ <add name="Session" type="Microsoft.AspNet.SessionState.SessionStateModuleAsync, Microsoft.AspNet.SessionState.SessionStateModule.Version=1.1.0.0, Culture=neutral" /> ▪ <add name="Session" type="System.Web.SessionState.SessionStateModule" /> ▪ Added for Generative AI <ul style="list-style-type: none"> ▪ AiServiceHandler.ashx - - <add verb="*" path="ai/*" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" /> ▪ AiServiceHandler - <add name="AiServiceHandler" precondition="integratedMode" verb="*" path="ai/*" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" resourceType="Unspecified" /> ▪ <add verb="*" path="AiServiceHandler.ashx" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" /> ▪ <add name="AiServiceHandler" precondition="integratedMode" verb="*" path="AiServiceHandler.ashx" type="Saleslogix.AI.Handler.AiHttpHandler, Saleslogix.AI.Handler" resourceType="Unspecified" /> 	
Infor CRM Customer Portal	SupportFiles	appSettings.config	<ul style="list-style-type: none"> ▪ Binding Redirect added for: System.Runtime.CompilerServices.Unsafe 	9.1
Infor CRM Customer Portal	SupportFiles	appSettings.config	<ul style="list-style-type: none"> ▪ Changes for password self-service email settings now set in Office Profile (INFORCRM-30192) 	9.2
Infor CRM Customer Portal	SupportFiles	appSettings.config	<ul style="list-style-type: none"> ▪ Help Domain URL updated for 10.0 	10.0
Infor CRM Customer Portal	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ Binding Redirect added for System.Formats.Asn1 ▪ Binding Redirect added for MimeKit ▪ Binding Redirect added for MailKit 	9.3
Infor CRM Customer	SupportFiles	web.config	<ul style="list-style-type: none"> ▪ Updated sprite map use of .png files with .webp files for better compression to improve performance. 	9.4

Portal	Location	Filename	Description	Version
Portal				
Infor CRM Job Service	SupportFiles	tenant.config	<ul style="list-style-type: none"> Binding Redirect added for: System.Runtime.CompilerServices.Unsafe 	9.1
Infor CRM Job Service	SupportFiles	tenant.config	<ul style="list-style-type: none"> Common Logging.Log4Net.Universal.Log4NetFactory Adapter. 	9.2
Infor CRM Job Service	SupportFiles	tenant.config	<ul style="list-style-type: none"> Binding Redirect added for: Newtonsoft.Json Binding Redirect added for System.Formats.Asn1 Binding Redirect added for MimeKit Binding Redirect added for MailKit 	9.3
Infor CRM Job Service	SupportFiles	web.config	<ul style="list-style-type: none"> Binding Redirect added for: System.Runtime.CompilerServices.Unsafe Common Logging.Log4Net.Universal.Log4NetFactory Adapter. 	9.1
Infor CRM Job Service	SupportFiles	web.config	<ul style="list-style-type: none"> Binding Redirect added for: System.Runtime.CompilerServices.Unsafe Common Logging.Log4Net.Universal.Log4NetFactory Adapter. 	9.3
SlxModelDownload	SupportFiles	log4net.config	<ul style="list-style-type: none"> In support of the new SLXModelPortal for the downloadable Application Architect. 	9.1
SlxModelDownload	SupportFiles	Web.config	<ul style="list-style-type: none"> 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
ActivityOverrideSummaryAge	<p>Activity Override Summary Age in Months</p> <p>Applies to Generative AI</p> <p>Specify the time range (in months) for which activities are available to summarize.</p> <p>The default setting is 12. Activities older than 12 months are excluded when generating a summary.</p> <p>A value of -1 indicates that all activities are available to summarize.</p>	10.0
AllowPartitionedCookieAttribute	<p>Specify if the Partitioned cookie attribute is included in requests.</p> <ul style="list-style-type: none"> Default is True and should remain as True for most implementations. 	9.3

Custom Setting	Description	Version
	<ul style="list-style-type: none"> ▪ Set to False for the following implementations: <ul style="list-style-type: none"> ▪ Single-tenant environments with multiple web servers going through a load balancer. ▪ Infor CRM SLX OS Portal ▪ Infor CRM SLX is hosted inside of an IFrame if the parent frame does not support cookie partitioning. <p>Note: In these environments, including that cookie may cause issues with the "stickiness" of the load balancer requests, causing other issues.</p>	
CampaignOverrideSummaryAge	<p>Campaign Override Summary Age in Months</p> <p>Applies to Generative AI</p> <p>Specify the time range (in months) for which campaigns are available to summarize.</p> <p>The default setting is 36. Campaigns older than 36 months are excluded when generating a summary.</p> <p>A value of -1 indicates that all campaigns are available to summarize.</p>	10.0
DisplayListViewFilterCounts	<p>Display List View Filter Counts</p> <p>Displays or hides list view filter counts.</p> <ul style="list-style-type: none"> ▪ Specify True to calculate and display the count values of list view filters. This is the default value. ▪ Specify False to hide the count values of list view filters. 	10.0
EmailSubject	<p>The email subject of the MFA email message</p> <p>Specify the text to display in the subject of the email notification message for Multi-Factor Authentication when using an Email authentication method.</p>	9.3

Custom Setting	Description	Version
Enable SMTP Tracing	<p>Enables or disables SMTP tracing for Multi-Factor Authentication when using an Email authentication method.</p> <ul style="list-style-type: none"> ▪ Specify False to disable SMTP tracing This is the default value ▪ Specify True to enable SMTP tracing 	9.3
HideContactProcesses	<p>Hide Contact Processes</p> <p>Displays or hides the Processes tab on the Contact detail view and Processes on the navigation bar, under Sales.</p> <ul style="list-style-type: none"> ▪ Specify True to hide instances of Contact Processes. This is the default value for new installs. ▪ Specify False to display instances of Contact Processes. This is the default value for upgrades. 	10.0
HideSalesProcesses	<p>Hide Sales Process</p> <p>Displays or hides the Sales Process tab on the Opportunity detail view and the Default Sales Process option on the Tools Options Opportunities tab.</p> <ul style="list-style-type: none"> ▪ Specify True to hide instances of Sales Process. This is the default value for new installs. ▪ Specify False to display instances of Sales Process. This is the default value for upgrades. 	10.0
HideWelcomePage	<p>Hide the Welcome page</p> <p>Displays or hides Welcome item on the navigation bar, removes Welcome from the Show on Startup option on the Tools Options General tab, and removes the ability to promote a group to the Welcome page.</p> <ul style="list-style-type: none"> ▪ Specify True to hide instances of the Welcome page. This is the default value for new installs. ▪ Specify False to hide instances of the Welcome page. This is the default value for upgrades. 	10.0

Custom Setting	Description	Version
HistoryOverrideSummaryAge	<p>History Override Summary Age in Months</p> <p>Applies to Generative AI</p> <p>Specify the time range (in months) for which history items are available to summarize.</p> <p>The default setting is 24. History items older than 24 months are excluded when generating a summary.</p> <p>A value of -1 indicates that all history items are available to summarize.</p>	10.0
LeadOverrideSummaryAge	<p>Lead Override Summary Age in Months</p> <p>Applies to Generative AI</p> <p>Specify the time range (in months) for which leads are available to summarize.</p> <p>The default setting 36. Leads older than 36 months are excluded when generating a summary.</p> <p>A value of -1 indicates that all leads are available to summarize.</p>	10.0
MfaAuthModuleSkipList	<p>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:</p> <ul style="list-style-type: none"> ▪ SLXWinAuthentication.aspx ▪ WinAuthLoad.aspx 	9.3
MfaFormsAuthReturnUrlSkipList	<p>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</p>	9.4
MfaWinAuthNextUrlSkipList	<p>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</p>	9.4

Custom Setting	Description	Version
OpportunityOverrideSummaryAge	<p>Opportunity Override Summary Age in Months</p> <p>Applies to Generative AI</p> <p>Specify the time range (in months) for which opportunities are available to summarize.</p> <p>The default setting is 48. Opportunities older than 48 months are excluded when generating a summary.</p> <p>A value of -1 indicates that all opportunities are available to summarize.</p>	10.0
ReplyToDisplayName	<p>The reply to display name</p> <p>Specify the display name to use if a user replies to the email notification for Multi-Factor Authentication when using an Email authentication method.</p>	9.3
ReplyToEmailAddress	<p>The reply to email address</p> <p>Specify the email address to use if a user replies to the email notification for Multi-Factor Authentication when using an Email authentication method.</p>	9.3
SchedulingWatchDogTimeoutMinutes	<p>The SLXJobServer Watch Dog functionality scans all executions in either the Running or Interrupting status every 30 seconds.</p> <p>Use the SchedulingWatchDogTimeoutMinutes custom setting to specify the maximum acceptable duration, in minutes, for any individual SLX Job Server based process.</p> <ul style="list-style-type: none"> ▪ -1 disables the feature This is the default value ▪ Valid entries are 1-120. ▪ 30, recommended value for enabling the feature 	9.2
StickyCookieExpires	<p>The number of days the SlxStickySessionId cookie should expire after being created.</p> <p>Valid values are 0-7 (days)</p> <ul style="list-style-type: none"> ▪ A value of 0 creates an ASP.NET Session cookie. ▪ The default value is 0. 	10.0

Custom Setting	Description	Version
SyncDelayBetweenWorkerThreadsInSeconds	<p>Sync delay between worker threads in seconds</p> <p>Back Office Extension</p> <p>Specify the the delay time (in seconds) between the start of each inbound processing thread.</p> <p>The default value is 5 seconds.</p>	10.0
SyncMaxPercentageOfThreadsToConsumeInDecimalFormat	<p>Sync max percentage of threads to consume in decimal format</p> <p>Back Office Extension</p> <p>Specify the portion (as a decimal) of the 10 worker threads that will be used for inbound Bod processing.</p> <p>The default value is 0.8.</p>	10.0
SyncMaxThreadLoadGovernorInKBytes	<p>Sync max thread load governor in KBytes</p> <p>Back Office Extension</p> <p>Specify the maximum Bod content size (in kilobytes) that each inbound worker thread can process.</p> <p>The default value is 40960 (40 MB in KB).</p>	10.0
SyncReloadLowWaterFactorInDecimalFormat	<p>Sync reload low water factor in decimal format</p> <p>Back Office Extension</p> <p>Determines when the inbound processor will add more prioritized BODs to the in-process queue.</p> <p>Specify the maximum fraction (as a decimal) of the "Inbox Message Fetch Size" that can remain in the queue before reloading it with the next batch of prioritized BODs.</p> <p>The default value is 0.2.</p>	10.0
SyncWorkerJobLimit	<p>Specifies the allowed number of concurrent worker jobs for calendar and contact sync.</p>	9.4

Custom Setting	Description	Version
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	10.0
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.		9.0
	Updated to include: <ul style="list-style-type: none"> Entities/Attachment/Delete 	9.1	
	Updated to include: <ul style="list-style-type: none"> Administration/CustomerJourney/Add Administration/CustomerJourney/Delete Administration/CustomerJourney/Edit Administration/CustomerJourneyinstance/Delete Administration/CustomerJourney/View Entities/User/LoggedInUsers 	9.2	
	Updated to include: <ul style="list-style-type: none"> Administration/Plugin/ReleaseToEveryone Administration/SpeedSearchManager/AddIndex Administration/SpeedSearchManager/AddSchedule Administration/SpeedSearchManager/DeleteIndex Administration/SpeedSearchManager/DeleteSchedule Administration/SpeedSearchManager/EditIndex Administration/SpeedSearchManager/EditSchedule Administration/SpeedSearchManager/ManageSettings 	9.3	

Role	Description	Version	10.0
	<ul style="list-style-type: none"> ▪ Administration/SpeedSearchManager/RunSchedule ▪ Administration/SpeedSearchManager/View 		
	Updated to include: <ul style="list-style-type: none"> ▪ Administration/LeadCaptureConfiguration/View ▪ Administration/LeadCaptureConfiguration/Edit 	9.4	
	Updated to include: <ul style="list-style-type: none"> ▪ Administration/GroupManager/ManageGlobalJoins ▪ Administration/ReassignActivities ▪ Dashboard/AddLayout ▪ Dashboard/ShareLayout ▪ Dashboard/DeleteLayout ▪ Toolbar/AIAssistant ▪ Toolbar/Tools/SystemSummaryReport: 	10.0	
Contour	Allows access to Contour map features including places.		
	Updated to include: <ul style="list-style-type: none"> ▪ 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. <ul style="list-style-type: none"> ▪ Toolbar/Developer 	9.1	
	Updated to include: <ul style="list-style-type: none"> ▪ Administration//ExecuteSQL ▪ Administration/ManageCalculatedFields ▪ Administration/ManageDatabase ▪ Administration/ManageDeployments ▪ Administration/ManagePlugins 	10.0	
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: <ul style="list-style-type: none"> ▪ 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: <ul style="list-style-type: none"> ▪ Entities/Attachment/Delete 	9.1	

Role	Description	Version	10.0
	Updated to include: <ul style="list-style-type: none"> Import/History/View 	9.4	
	Updated to include: <ul style="list-style-type: none"> Dashboard/AddLayout Dashboard/ShareLayout Import/History/View Toolbar/AIAssistant 	10.0	

Secured Actions

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

Secured Action	Role/Description	Version
Administration/CustomerJourney/Add	Administrator role: grants permission to create customer journeys.	9.2
Administration/CustomerJourney/Delete	Administrator role: grants permission to delete customer journeys.	9.2
Administration/CustomerJourney/Edit	Administrator role: grants permission to edit customer journeys.	9.2
Administration/CustomerJourneyInstance/Delete	Administrator role: grants permission to delete customer journey instances from the Customer Journey tab on supported details views.	9.2
Administration/CustomerJourney/View	Administrator role: grants permission to view Customer Journey lists and detail views.	9.2
Administration/ExecuteSQL	Developer role: grants permission to access Execute Query on the Tools menu and execute SQL queries.	10.0
Administration/GroupManager/ManageGlobalJoins	Administrator role: grants permission to manage global joins from Query Builder.	10.0
Administration/LeadCaptureConfiguration/View	Administrator role: grants permission to view the Lead Capture Configuration view.	9.4
Administration/LeadCaptureConfiguration/Edit	Administrator role: grants permission to view the Lead Capture Configuration view.	9.4
Administration/License/Add	Administrator role: Grants permission to add an Infor CRM license. Not assigned to any role	9.2

Secured Action	Role/Description	Version
Administration/License/Delete	Grants permission to delete an Infor CRM license. Not assigned to any role	9.2
Administration/ManageCalculatedFields	Developer role: grants permission to manage calculated fields in Query Builder.	10.0
Administration/ManageDatabase	Developer role: grants permission to access Database Manager under Administration in the navigation bar and perform database management actions.	10.0
Administration/ManageDeployments	Developer role: grants permission to access Manage Deployments on the Developer Tools menu and perform deployment actions. The user must also have permission to view the Developer Tools menu (Toolbar/Developer).	10.0
Administration/ManagePlugins	Developer role: grants permission to access Plugin Manager under Administration in the navigation bar and perform plugin management actions.	10.0
Administration/Plugin/ReleaseToEveryone	Administrator role: grants permission to release groups to "Everyone" in Query Builder.	9.3
Administration/ReassignActivities	Administrator role: grants access and permission to Reassign Activities in the Activities list view. Note: Users with this secured action will still require view and edit calendar access to reassign other users' activities.	10.0
Administration/Security/EveryoneOwnerAssignment	Not associated with a role: grants permission to change the owner of a record if the current owner is 'Everyone'.	10.0
Administration/Security/OwnerAssignmentNoAccess	Not associated with a role: grants permission to change record ownership to any other team/user regardless of access to the other team/user	
Administration/SpeedSearchManager/View	Administrator role: grants permission to view SpeedSearch Manager	9.3
Administration/SpeedSearchManager/AddIndex	Administrator role: grants permission to add SpeedSearch indexes	9.3
Administration/SpeedSearchManager/EditIndex	Administrator role: grants permission to edit SpeedSearch indexes	9.3
Administration/SpeedSearchManager/DeleteIndex	Administrator role: grants permission to delete SpeedSearch indexes	9.3
Administration/SpeedSearchManager/AddSchedule	Administrator role: grants permission to	9.3

Secured Action	Role/Description	Version
	add SpeedSearch schedules	
Administration/SpeedSearchManager/EditSchedule	Administrator role: grants permission to edit SpeedSearch schedules	9.3
Administration/SpeedSearchManager/DeleteSchedule	Administrator role: grants permission to edit SpeedSearch schedules	9.3
Administration/SpeedSearchManager/RunSchedule	Administrator role: grants permission to run SpeedSearch schedules	9.3
Administration/SpeedSearchManager/ManageSettings	Administrator 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
Dashboard/AddLayout	Standard User and Administrator roles: grants permission to create, edit, and delete personal layouts and add, edit, or reorder widgets on personal layouts on the Dashboard or in a widget panel.	10.0
Dashboard/DeleteLayout	Administrator role: grants permission to delete any layouts, including shared layouts on the Dashboard or in a widget panel.	10.0
Dashboard/ShareLayout	Standard User and Administrator roles: grants permission to share personal layoutson the Dashboard or in a widget panel.	10.0
Entities/Attachment/Delete	Standard User role: grants permission to delete attachments.	9.1
Entities/JobManager/StartJobService	Administrator role: grants permission to start and stop the Job Service in job Manager.	9.3
Entities/Opportunity/OverridePricing	Not associated with a role: grants permission to override default pricing information (Unit Price, Adjusted Price, Discount, and Extended Discount) for an opportunity product.	10.0
Entities/Product/Import	Not associated with a role: grants permission to import products.	10.0
Entities/User/LoggedInUsers	Administrator 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/AIAssistant	Administrator and Standard User roles: grants permission to access the AI	10.0

Secured Action	Role/Description	Version
	Asistant in the toolbar.	
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
Toolbar/Tools/SystemSummaryReport	Administrator role: grants permission to view the System Summary Report on the Tools menu.	10.0

