



Applying Web Model Update 09 for Version 8.3

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Introduction



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

About this guide

This document describes Web Model Update 09 for Infor CRM version 8.3.

Prerequisites

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

- Infor CRM version 8.3
- 8.3 SNC Update 09
- 8.3 Web Core Update 09



Do not install Web Model Update 09 for Infor CRM 8.3 on any other Infor CRM version.



Web Model Updates are cumulative. You do not need to install earlier Web Model updates before installing Web Model Update 09.

Additional considerations

- Infor CRM Back Office Extension (ICBOE) requires the following updates:
 - SNC Update 04 or later for Infor CRM version 8.3
 - Core Update 04 or later for Infor CRM version 8.3
 - Model Update 04 or later for Infor CRM version 8.3

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- Contour feature requires the following updates:
 - SNC Update 04 or later for Infor CRM version 8.3
 - Core Update 04 or later for Infor CRM version 8.3
 - Model Update 04 or later for Infor CRM version 8.3
 - If your installation includes the Proximity Search third-party product by Xtivia, and you will be converting to Infor's Contour feature, do the following before installing Infor CRM v8.3 Update 04 or later:



If you completed this task in 8.3 Update 04, you do not need to repeat it.

- Stop the Windows Task that was created as part of Proximity Search and delete the task. If the task is not stopped, it may continue to geocode during the upgrade, which may result in some inaccurate data. If the Windows task is still running after the upgrade, it will impede the Infor Job Manager from geocoding for Contour.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/infortxtreme.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

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

Chapter 1

Changes in this Update


1

This chapter lists all of the changes to Infor CRM since version 8.3.

Features added in this update

This table lists the features available in each update and indicates the type of update (SNC, Core, or Model) required, as well as any additional pieces required to fully install the feature.

| Application | Feature | Requires | | | | |
|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| 8.3.0.09 | | | | | | |
| This release only includes fixed issues, there are no new features. | | | | | | |
| Please refer to the Fixed Issues list for a list of issues fixed in 8.3 Web Model Update 09. | | | | | | |
| 8.3.0.08 | | | | | | |
| Web Client | There are now separate options for setting language and regional formats. The new Regional Formats option determines date, time, number, and currency formats. | x | x | x | | |
| Web Client | Account Hierarchy <ul style="list-style-type: none">■ The ability to view a hierarchy view of the parent and all children and grandchildren of an account from the Account detail view.■ Access to a quick view of frequently used entities (contacts, opportunities, sales orders and activities). | x | x | x | | |
| Web Client | The error message "Mail details to your administrator" link now opens an e-mail message that can be sent to an e-mail address defined by the administrator. | x | x | x | | |

| Application | Feature | Requires | | | | |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | Ability to select a language on the Contact Detail view Details tab that will change the list items in the Prefix, Suffix, and Title pick lists for a particular contact. These pick lists must be configured by the administrator in order to support multiple languages. | x | x | x | | |
| Web Client | For Back Office implementations: | | | | | |
| | <ul style="list-style-type: none"> Normalize Base Currency provides an option to store data published by an ERP in terms of the Infor CRM base currency. This allows customers who opt for this service, to work in Infor CRM using the Infor CRM base currency even though the integrated back office ERP system uses a different base currency. | x | x | x | x | |
| | <ul style="list-style-type: none"> ION Workflow enables Infor CRM users to initiate a workflow defined in ION from within Infor CRM. The trigger can be defined as conditional or manual in Infor CRM and the trigger can be extended to other entities. | x | x | x | | |
| | <ul style="list-style-type: none"> Discrete Address provides the option to use a discrete type of address if it is passed from an integrated back office ERP system. | x | x | x | x | |
| | <ul style="list-style-type: none"> Master Data Consolidation is an optional feature that consolidates duplicate accounts, resulting from host systems like ERP-M3, ERP-LX and ERP-Visual, with the same CustomerID into a single Infor CRM account record. | x | x | x | x | |
| |  The publishing of quotes and sales orders from Infor CRM to the host ERP system is not supported with Master Data Consolidation enabled. | | | | | |

| Application | Feature | Requires | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | Infor CRM with Infor Ming.le: | | | | | |
| | <ul style="list-style-type: none"> ■ Infor Ming.le Funnel Chart widget | x | x | x | | x |
| | <ul style="list-style-type: none"> ■ Infor Ming.le Top Prospects widget is a list of my prospective accounts. | x | x | x | | x |
| | <ul style="list-style-type: none"> ■ Infor Ming.le Infor CRM Opportunities widget of associated quotes for each opportunity. | x | x | x | | x |
| | <ul style="list-style-type: none"> ■ Infor Ming.le Infor CRM Contracts widget which provides a detailed view of the contract and associated contacts. | x | x | x | | x |
| | <ul style="list-style-type: none"> ■ Infor Ming.le Infor CRM Activities widget lists a user's daily activities and allows them to “complete” those activities within the widget. | x | x | x | | x |
| <p>Additional steps are required for implementing these new features. For more information, see the <i>Infor CRM with Infor Mingle v8.3.0.08 Release Notes</i> or for new implementations of Infor CRM for Infor Ming.le see <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - Cloud Edition</i> or <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - On-premises Edition</i> documents.</p> | | | | | | |

| Application | Feature | Requires | | | | |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | For administrators and those with appropriate role access: | | | | | |
| | <ul style="list-style-type: none"> Ability to create multi-regional pick lists with different list items for each language. The contents of a multi-regional pick list will depend upon the user's language setting. | x | x | x | | |
| | <ul style="list-style-type: none"> Ability to set a default language for multi-regional pick lists. | x | x | x | | |
| | <ul style="list-style-type: none"> Ability to set the Desired Language on the Name Prefix and Name Suffix so that users can select a language on the Contact Detail view Details tab that will change the list items in the Prefix and Suffix, pick lists. | x | x | x | | |
| | <ul style="list-style-type: none"> A new Office Profile Error Notifications tab that allows you to enable the Error message e-mail link feature and specify one or more e-mail addresses that will automatically populate the e-mail To: field. | x | x | x | | |
| | <ul style="list-style-type: none"> If the Error message e-mail link feature is enabled, users who encounter an error message can send an e-mail to the specified address that contains a link that will display Event Viewer information. The Event Viewer information is only available to administrators or users granted access to the ErrorLookupService/View secured action. | x | x | x | | |
| | <ul style="list-style-type: none"> New secured action for Account Hierarchy - Entities/Account/Hierarchy | x | x | x | | |
| Application Architect | No new features | | | | | |
| Windows Client | No new features | | | | | |
| 8.3.0.07 | | | | | | |
| Web Client | New secured actions for the Job Manager job schedules and triggers. | x | x | | | |

| Application | Feature | Requires | | | | |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | For Back Office implementations: | | | | | |
| | <ul style="list-style-type: none"> The Local Pricing feature allows you to choose, on a per entity basis, between the ERP Pricing Service or local Infor CRM pricing which allows users to modify product pricing and discount amounts in Infor CRM. Using local pricing is only recommended for entities that are not synchronized to an ERP system. | x | x | x | | |
| | <ul style="list-style-type: none"> Improvements for customizing and upgrading customized BOD mappings and BOD field mappings which previously could not be upgraded. | x | x | x | | |
| | <ul style="list-style-type: none"> A new Language Code option for supporting integrated content in a localized environment. | x | x | x | | |
| Web Client | Infor CRM with Infor Ming.le: | | | | | |
| | <ul style="list-style-type: none"> A new Dashboard widget for Group Lists (Infor.CRM.GroupList - v1.0.6.3.zip) is available. | x | x | x | | x |
| | Additional steps are required for implementing this new feature. For more information, see the <i>Infor CRM with Infor Mingle v8.3.0.07 Release Notes</i> or for new implementations of Infor CRM for Infor Ming.le see <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - Cloud Edition</i> or <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - On-premises Edition</i> documents | | | | | |
| Windows Client | No new features | | | | | |
| Application Architect | No new features | | | | | |
| 8.3.0.06 | | | | | | |
| Web Client | The ability to look for potential matching records when adding a new account. | x | x | x | | |
| Web Client | When moving a contact there is a new option to assign all items to the same contact. | x | x | x | | |
| Web Client | Showing groups has been replaced by group Favorites. Favorites determine which groups display as tabs on list and detail views. | x | x | x | | |
| Web Client | Export to File and Export to Excel have been combined and renamed Export in Common Tasks and from the right-click menu. | x | x | x | | |

| Application | Feature | Requires | | | | |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | Changes to Export to improve performance, including a limit to the number of records to be exported and the ability to turn off exporting pivot tables to Microsoft Excel. | x | x | x | | |
| Web Client | Sales Intelligence includes the ability to view the likelihood that a contact or account will make a purchase and provides a Recommendations tab that recommends products the contact or account is likely to purchase in the next 30 days. | x | x | x | | |
| Web Client | Infor CRM with Infor Ming.le: | | | | | |
| | <ul style="list-style-type: none"> A new Dashboard widget for Opportunity Status (CRM.opportunity.Status.zip) is available. | x | x | x | | x |
| | <ul style="list-style-type: none"> An updated WebProvisioningUI.exe that adds provisioning information to the Virtual File System (VFS). | x | x | | | |
| | Additional steps are required for implementing this new feature. For more information, see the <i>Infor CRM with Infor Mingle v8.3.0.06 Release Notes</i> or for new implementations of Infor CRM for Infor Ming.le see <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - Cloud Edition</i> or <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - On-premises Edition</i> documents. | | | | | |
| Web Client | For administrators and those with appropriate role access: | | | | | |
| | <ul style="list-style-type: none"> Steps for configuring Sales Intelligence, including the displaying the purchase likelihood score options. | x | x | x | | |
| | <ul style="list-style-type: none"> New Custom Settings list view and Custom Settings detail view to manage group export settings, CreatePivot and MaxExportRecords. | x | x | x | | |
| | <ul style="list-style-type: none"> There is a new Office Profile Groups tab that allows you to set a limit for the number of groups that can display as tabs on list and detail views. All standard groups will be marked as Favorites by default. | x | x | x | | |
| | <ul style="list-style-type: none"> There is a new common task on the Group Manager view to determine which groups will be marked as Favorites by default for new users. | x | x | x | | |
| Windows Client | No new features | | | | | |
| Application Architect | Performance improvements for applying VFS bundles | x | x | | | |

| Application | Feature | Requires | | | | |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| 8.3.0.05 | | | | | | |
| Web Client | Completed meetings now display contact and account information on the Calendar. | x | x | | | |
| Web Client | SData portal performance enhancements. | x | x | x | | |
| Web Client | Field level security information can now be queried and returned through SData. | x | x | x | | |
| Web Client | Job Server clustering to allow load sharing across multiple machines or multiple nodes on the same machine and to monitor Job Server statistics using SData or Windows Performance Counters. | x | x | | | |
| Web Client | Infor CRM with Infor Ming.le: | | | | | |
| | <ul style="list-style-type: none"> ■ Users and roles are now synchronized between Infor CRM and Infor Ming.le. | x | x | x | | x |
| | <ul style="list-style-type: none"> ■ A new tool to simplify the Infor Ming.le provisioning process. | x | x | x | | x |
| | For more information, see the <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - Cloud Edition</i> or <i>Integrating Infor CRM with Infor Ming.le Infor Ming.le - On-premises Edition</i> documents. | | | | | |
| Windows Client | No new features | | | | | |
| Application Architect | No new features | | | | | |
| 8.3.0.04 | | | | | | |
| Web Client | Contour integration provides the ability to map contact and account addresses in order to view contacts and accounts that are near one another. You can also add places that are not contacts or accounts, such as a hotel or airport. | x | x | x | | |
| Windows Client | No new features | | | | | |
| Application Architect | No new features | | | | | |
| 8.3.0.03 | | | | | | |
| Web Client | The ability to remove bad records from the Sync Digest table. | x | x | | | |

| Application | Feature | Requires | | | | |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | For Back Office implementations: | | | | | |
| | <ul style="list-style-type: none"> System of record support for Inbound Process BODs to create or update Infor CRM content. | x | x | x | | |
| | <ul style="list-style-type: none"> Added the Back Office Extension option Numeric Culture to parse international numeric BOD values. | x | x | | | |
| | <ul style="list-style-type: none"> Addition of Discount Charge Item entity properties for Sales Order and Quotes list levels - DocUnitAdjustmentAmount, UnitAdjustmentAmount, and Method. | x | x | x | | |
| Web Client | Infor CRM with Infor Ming.le: | | | | | |
| | Sharing records and notes and history items | x | x | x | | x |
| | Creating and managing bookmarks | x | x | x | | x |
| | Links in Infor Ming.le that link to Infor CRM | x | x | x | | x |
| | Adding Infor CRM Dashboard widgets in Infor Ming.le | x | x | x | | x |
| | For more information about integrating Infor CRM with Infor Ming.le, see KB 1853014, available from Infor Xtreme www.inforxtreme.com . | | | | | |
| Windows Client | No new features | | | | | |
| Application Architect | No new features | | | | | |
| 8.3.0.02 | | | | | | |
| Web Client | Ability to refresh pricing for sales orders and quotes when using a price service. | x | x | | | |
| | Access to this feature must be granted to users. For more information, see the Web Client online help topic "Enabling Refresh Pricing". | | | | | |
| Web Client | System of record - Enables Infor CRM to function as the authoritative system of record for Opportunities in an integration between Infor CRM and a supported ERP system through Infor ION. | x | x | x | | |
| Windows Client | No new features | | | | | |
| Application Architect | No new features | | | | | |
| 8.3.0.01 | | | | | | |
| Web Client | Creating an ad hoc group with a large number of records now uses the Job Manager. | x | x | | | |
| Web Client | Improvements to Reporting performance. | x | x | | | |

| Application | Feature | Requires | | | | |
|-----------------------|----------------------------------------------------------------------------------------------------------|----------|------|-------|----------|---------------|
| | | SNC | Core | Model | BOD Pack | Infor Ming.le |
| Web Client | Added a Test Link button to the Price Service detail view to test the price and availability end points. | x | x | x | | |
| Web Client | Added logging and exception handling for Price and Availability. | x | x | x | | |
| Web Client | Enhanced the Account detail view Sales Order tab to include additional information. | x | x | x | | |
| Windows Client | Improvements to Reporting performance | x | | | | |
| Application Architect | Ability to change the ad hoc group number of record threshold. | x | x | | | |



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

Issues fixed in this update

Web Model Update 09 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-5174 | Currency symbols do not display in the list view when the Currency format is defined as \$%.2m. |
| INFORCRM-9712 | Words without any spaces need to be rephrased or updated to allow for translations. |
| INFORCRM-10827 | SpeedSearch Security ignores security settings and allows users to see all other users information. |
| INFORCRM-12230 | Dragging and dropping an email with multiple attachments from Microsoft Outlook to Infor CRM appears to fail if the user attempts to remove one of the attachments before recording the email. |
| INFORCRM-13088 | SData for Customer Portal does not set specified user during deployment. |
| INFORCRM-13292 | In a German environment, in Query Builder, after selecting a condition value that contains an umlaut the selected value displays corrupt characters. |
| INFORCRM-13338 | Setting the Opportunity Stage filter to Empty causes all stages to appear. |
| INFORCRM-14541 | In a French web environment, the Query Builder view has no tables or fields. |
| INFORCRM-14558 | Back Office entries that are cloned do not correctly assign SeccodeID. |
| INFORCRM-14862 | Mailing Ticket Details when the user has no email address causes the error "Object reference not set to an instance of an object." |
| INFORCRM-15179 | If the Role Entities / Users / View action is added to the Standard User role, users assigned with role can not only view other users, but they can also edit or enable and disable users. |

| Defect | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-15198 | In the Contacts, list view selected check boxes are cleared when scrolling through the list. |
| INFORCRM-15299 | The error message in the ImportHistoryDuplicates.ascx.resx is incorrect. |
| INFORCRM-15320 | In the Opportunity snapshot, changing the Close Probability requires clicking Save twice in order to correctly perform any calculations. |
| INFORCRM-15674 | On the Form Designer, the Invariant drop-down list only displays DE, FR, IT, RU even if other languages are installed. |
| INFORCRM-15747 | In a localized environment, the Quotes Detail report header is not translated |
| INFORCRM-16024 | In a Multi-Currency enabled environment, the Quotes and Sales Orders Copy to Email does not show the correct values. |
| INFORCRM-16116 | On the Opportunity Detail view, Copy to Email does not copy the Sales Potential amount to the email. |
| INFORCRM-16129 | On the Opportunity Detail view Sales Process tab, sometimes clicking the stage drop down list does not display any list options and causes Infor CRM to stop responding. |
| INFORCRM-16329 | When performing a Copy to E-mail for a closed opportunity, the Sales Potential should be listed in the resulting email, not the Weighted Value. |
| INFORCRM-16348 | On the Sales Order Detail view, some tabs with grid views are not formatted correctly. |
| INFORCRM-16493 | Users cannot drag and drop Library files. |
| INFORCRM-16585 | In the Account, Invoices tab, the Total Amount heading should be Grand Total. |
| INFORCRM-16671 | In a localized environment, on the Opportunity Detail view Quotes tab, the Status is untranslated . |
| INFORCRM-16727 | Merging leads identified as duplicates only keeps the target lead record information even when some source information is selected to be used instead. |
| INFORCRM-16729 | Fixed a spelling mistake in "Unit Price per Quantity" on the Invoice Line Item tab. |
| INFORCRM-16764 | (ICBOE) In an Oracle environment, rejected BODs should be listed in Sync Results with the error message, 'SYNCRESLT'. 'ERRORMESSAGE' (actual: 310, maximum: 255). |
| INFORCRM-16766 | In the Product Lookup, a search based on Configured Items does not return any results. |
| INFORCRM-16793 | In the Parent Account lookup, a search based on City or State does not return any results. |
| INFORCRM-16870 | In an environment with a regional format of Deutsch (Schweiz) [de-ch, in Literature Items list view, the number format is wrong in the On Hand and Reorder Quantity columns. |
| INFORCRM-17030 | (ICBOE) When refreshing Pricing Service with the LN ERP, if the LN password contains a special character Infor CRM does not send the password to LN which causes an error. |
| INFORCRM-17288 | In the Invoices Detail view, on the Sales Persons tab there are duplicate 'Status' columns. |
| INFORCRM-17465 | The Ticket Detail view Journal tab User column displays the Userid instead of user name. |
| INFORCRM-17502 | In the Product Lookup, when searching on Product Status, no pick list items display in the pick list. |
| INFORCRM-17543 | In the Opportunity, Quote and Sales Order Detail views Products tab, the transaction currency values display incorrectly as the base currency. |
| INFORCRM-17579 | Email address extensions that are greater than 7 characters cause validation errors. |
| INFORCRM-17653 | On the Integration Detail view, the Test Link button should only show for the Dated Exchange Rate integration. |
| INFORCRM-17713 | (Ming.Je) The Infor CRM Group List widget drill back link to the sales order entity is not working for any groups. |
| INFORCRM-17814 | In the Quote Detail view Discount/Charges tab , the Amount and Rate columns do not display the currency code. |

Issues fixed in previous updates

Web Model Updates are cumulative, so Web Model Update 09 for Infor CRM 8.3 contains fixes released in previous updates.

Web Model Update 08 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-5937 | Changing a sales process to 'None', results in the error message, "Cannot have multiple items selected in a DropDownList". |
| INFORCRM-9201 | In Application Architect, the Yearly Revenue exchange rate should be set to the base rate. |
| INFORCRM-12417 | Add the ability to configure an email address for the "Mail details of this exception to your administrator" link. |
| INFORCRM-12839 | On the SData Sync Configuration view clicking the Sync All button causes an error and should be removed since it is no longer necessary. |
| INFORCRM-12856 | In a localized environment, some Integration views, such as BOD Mappings contain untranslated strings. |
| INFORCRM-13179 | In a French environment, the Query Builder does not display any fields. |
| INFORCRM-14138 | Columns designated as center or right aligned columns in an editable grid display as left aligned in the Web Client. |
| INFORCRM-14152 | Changes made to an account address do not cascade to related contacts. |
| INFORCRM-14183 | The picklist "Text must match a list item " option is ignored in the Web Client. |
| INFORCRM-14428 | Changed all instances of "Date Due" to "Due Date". |
| INFORCRM-14435 | If a filter is based upon a database column with an underscore the filter will fail with an "Invalid column name" error. |
| INFORCRM-14527 | Performing an export from a detail view fails. |
| INFORCRM-14581 | Update the Dojo date/time formatters to support the new Region setting. |
| INFORCRM-14869 | The Account detail view Opportunities tab does not display Open Count, Closed-Won Count, Closed Lost Count, or Inactive Count values. |
| INFORCRM-15050 | The Opportunity Statistics report will fail if the selected opportunity group contains product fields. |
| INFORCRM-15062 | (ICBOE) On the ERP Person detail view the Associated Manager label should be Account Manager. |
| INFORCRM-15091 | In a Chinese environment, the Contact detail view Preferred Contact picklist contains two similar entries. |
| INFORCRM-15182 | In a localized environment, on the Office Profile Currency tab, some labels are too short. |
| INFORCRM-15259 | There are two instances of Saleslogix that need to be removed from the SData Sync Configuration view, and when deleting a back office from the Back Office tab. |
| INFORCRM-15449 | (ICBOE) In the Customize or Edit BOD Field Mapping dialog box, the Search Clause pick list does not display any values. |
| INFORCRM-15523 | The maxQueryStringLength="16384" changes to the SixClient and SData versions of the web.config are no longer necessary since sdata client library now converts large URLs to post requests. |
| INFORCRM-15801 | In a Dutch environment, on the Campaign detail view Targets tab, the Last Update and Last Response dates are truncated. |

| Defect | Description |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-15824 | Unable to filter results when Account Type is added to the Opportunity Contact lookup. |
| INFORCRM-15957 | In a localized environment, on the Tools, Options, General tab, the Base Template lookup does not open the Select a Template dialog box. |
| INFORCRM-15976 | In a Japanese environment, on the Campaign detail view, labels are wrapping on the Budget/Results tab. |
| INFORCRM-16037 | Infor CRM Library items accessed from Microsoft Outlook will not sort. |
| INFORCRM-16309 | In a German environment, the Account detail view, Contracts tab contains date and number format errors. |
| INFORCRM-16370 | On the Products list view, discontinued products display in the Available Products group. |
| INFORCRM-16675 | If filtering a group by a date range exporting those records to Excel displays the error "An error occurred requesting the job manager. String was not recognized as a valid DateTime." |
| INFORCRM-16749 | (ICBOE) In the Lookup Products dialog box, selecting Configured Item as a lookup criteria results in an SData error. |

Web Model Update 07 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-5639 | In a localized environment, the Link Addresses dialog box has untranslated characters. |
| INFORCRM-8285 | On the Campaign detail view Responses tab, the Type column contains untranslated strings. |
| INFORCRM-12287 | Currency information in editable grids does not display correctly. |
| INFORCRM-12826 | The Ticket Assets lookup should show only those assets owned by the account listed on the ticket. |
| INFORCRM-13938 | In some Add/Edit views, the title uses a back slash instead of a forward slash. |
| INFORCRM-13984 | Instances of Infor CRM Customer Portal should not be translated. |
| INFORCRM-14212 | When Contour is enabled, the "Show on Map" option should be removed if the contact or account does not have a GeoCode. |
| INFORCRM-14252 | When using Microsoft Internet Explorer as the browser, the Contour "Show on Maps" map requires a browser refresh. |

Web Model Update 06 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|------------------------------------------------------------------------------------------------------|
| INFORCRM-7892 | For Add New Account, added ability to check for duplicates. |
| INFORCRM-9190 | BOD field mapping default value is not honored when NULL values are sent in the BOD from ERP. |
| INFORCRM-9602 | Address box is editable with double click, even when set to read only. |
| INFORCRM-10002 | Interface spelling and grammar errors. |
| INFORCRM-10051 | Text strings formatted inappropriately for translation. |
| INFORCRM-10512 | Mobile localization 'Offline Options', 'Lead Addresses' label displays incorrectly. |
| INFORCRM-11214 | Adding a QuickForm to a Web Browser IFRAME control causes an error. |
| INFORCRM-11715 | Add ERP Notes for each of the integrated entities. |
| INFORCRM-12091 | Export to File uses a data table which causes performance issues. |
| INFORCRM-12248 | When creating an opportunity from a converted qualified lead, the lead source is not retained. |
| INFORCRM-12283 | Campaign Task sort order is incorrect. |
| INFORCRM-12432 | A large number of groups causes "unresponsive script" errors. |
| INFORCRM-12740 | New Move Contact option enabled completing all "reassign to contact" fields at once. |
| INFORCRM-12950 | The Read Only Radio Group will show the "unsaved data" prompt even though no changes have been made. |
| INFORCRM-13187 | The SalesOrderBillTo Form Payment Method control has incorrect picklist name. |
| INFORCRM-13237 | The Convert Quote to Sales Order should be blocked for Awarded Quotes. |
| INFORCRM-13318 | In the Web Client, the left aligned columns are shown as right aligned in the datagrid Smart Part. |
| INFORCRM-13417 | In the Russian localization, the layout of Lead detail view is difficult to use. |
| INFORCRM-13470 | Added Group favorites to improve performance. |
| INFORCRM-13485 | Create Secured Actions for Navigation bar and Menu bar items. |
| INFORCRM-13486 | The Web Client has a typographical error. |
| INFORCRM-13488 | The mail merge message contains an unnecessary ellipsis. |
| INFORCRM-13567 | In the Opportunity Competitors Entity, the "Lost Replaced" label should be "Lost/Replaced". |
| INFORCRM-13597 | The Opportunity Statistics does not always reflect the correct number of records in a group. |
| INFORCRM-13727 | In Options, the User Profile tab Language Selection drop-down list is empty. |
| INFORCRM-13756 | Modified the Exchange Sync Integration page with new text and layout for service and domain users. |
| INFORCRM-13892 | In the Sales Order line items, the Discount / Charges are not populating. |
| INFORCRM-13999 | Change "ImportAction" label to "Import Action". |
| INFORCRM-14001 | Change "FullName" label to "Full Name". |

Web Model Update 05 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-7192 | In a localized environment, the Opportunity detail view, Products tab, Status is not translated if the product was configured in CPQ. |
| INFORCRM-8563 | Add support for auth ticket cookie in the SData and SDataCustomer portals. |
| INFORCRM-9034 | (ICBOE) Deleting a product line in Infor CRM should be included in the Process BOD. |
| INFORCRM-9157 | Infor CRM must require unique account entity IDs for a back office. |
| INFORCRM-9388 | Implement bi-directional synchronization of roles between Infor CRM and Infor Ming.le. |
| INFORCRM-9440 | (ICBOE) On the Bill To detail view, the Ship To tab does not show any records. |
| INFORCRM-9913 | (ICBOE) The sales order or quote snapshot amount does not update the amount when a large number of line items are added. |
| INFORCRM-9920 | (ICBOE) When creating a new Ship To address, the Payment Method pick list displays non-A+ Payment Methods. |
| INFORCRM-9995 | Sync History Reprocess and Purge actions are not functioning. |
| INFORCRM-10467 | Address security cross-scripting vulnerabilities in the What's New view. |
| INFORCRM-10471 | Address Cross Site Request Forgery (CSRF) security vulnerabilities in the Web Client. |
| INFORCRM-10472 | Remove information such as files paths, private IP addresses, or overly detailed error messages that can make the Web Client vulnerable. |
| INFORCRM-10953 | The Library only displays part of the form and there is no scrollbar visible when accessing Library files. |
| INFORCRM-10985 | Create an interface for the Ming.le provisioning tool. |
| INFORCRM-11956 | Document new fields on the BOD Field Mapping detail view and BOD Mapping detail view Field Mappings tab. |
| INFORCRM-12082 | Synchronize user information to Infor Ming.le. |
| INFORCRM-12290 | Query Builder requests can be manipulated to show user name and password information. |
| INFORCRM-12577 | The Standard User role allows the ability to delete multiple opportunities. |
| INFORCRM-12703 | (ICBOE) Outbound transactions are failing for certain Location IDs. |
| INFORCRM-12735 | (ICBOE) Add Account Entity support in the Account lookup. |
| INFORCRM-12757 | (ICBOE) On the Edit Product dialog box, ERP Details tab, the Price Per Quantity UOM should be bound to QuoteItem.ErpUnitPricePerQuantityUOM, not Quote.UnitPricePerQuantity. |
| INFORCRM-12886 | If using a fractional currency the Opportunity Snapshot may display incorrect values. |
| INFORCRM-12906 | The ModelUtility does not provide IFieldLevelSecurityService so the POCO build template omits the field level security code. |
| INFORCRM-12908 | In an environment with non-USD base currency, the Opportunity Won/Lost dialog box display incorrect labels. |
| INFORCRM-12971 | (ICBOE) On the sales order and quote Edit Product dialog box, a SmartPart load error occurs due to outdated DiscountChargeItem.SalesOrder relationship. |

| Defect | Description |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-12974 | Changes to the Address.Country property in ErpBillToDetails, ErpShipToDetails, or ErpPayFromDetails fail to update the Address.CountryCode value. |
| INFORCRM-13019 | Add option to include field level security metadata in the dynamic adapter to avoid additional requests. |
| INFORCRM-13084 | Some grids require the browser to be constantly refreshed in order to display the correct data. |
| INFORCRM-13130 | Update Quartz from version 2.3.3 to version 2.4.1. |
| INFORCRM-13206 | In a Chinese environment, an error occurs when selecting "All" in the Results field in a Contour contact or account search. |

Web Model Update 04 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM - 3721 | In a Chinese environment, the Copy Profile dialog box labels are aligned incorrectly. |
| INFORCRM - 4250 | If a language other than English is selected and no language packs are installed, then the Import Process Results page is not responsive. |
| INFORCRM - 5295 | Sync for Gmail requires manual changes to the web.config file. |
| INFORCRM - 9334 | (ICBOE) A Charges tab has been added to the Invoice, Product Invoice Line item, and Receivable entity Detail views. |
| INFORCRM - 9434 | (ICBOE) The Parent Account on the Account detail view should be a link to the parent account detail view. |
| INFORCRM-10530 | In a German environment, an untranslated message displays if the user selects a role that is already selected. |
| INFORCRM-11955 | In a localized environment, the Outbound Transactions mainview Common Tasks label 'Entity Status' is not translated. |
| INFORCRM-12014 | In the Infor CRM Mobile Client, when adding a sales order from an opportunity, the order lines are not updated with product information. |
| INFORCRM - 12024 | In a Russian environment, the Campaign Targets filter view needs to be resized. |
| INFORCRM - 12026 | The Edit icon is missing from the Address field on the Ship To and Bill To tabs. |
| INFORCRM - 12028 | The Add button is missing from the Quote detail view Discount Charges tab. |
| INFORCRM-12072 | New Contour feature adds the ability to map contact and account addresses in order to view contacts and accounts that are near to one another. |
| INFORCRM-12075 | If the Back Office integration is disabled, the Bill-To, Discount Charges and Sales Persons tabs should not be visible in the Quote and Sales Order detail views. |
| INFORCRM-12186 | The PickListView.PickListName - First range has a bad upper value: "0-9" instead of just "9". |
| INFORCRM-12187 | Change Lead.Name & Ticket.Contact -to Lastname only since calculated fields cannot be optimized. |
| INFORCRM-12249 | For certain browsers, the Query Builder does not show conditions or layout. |
| INFORCRM-12483 | Remove the Forms section from Windows Auth in the SData web.config file. |

| Defect | Description |
|----------------|-------------------------------------------------------------------------------------------|
| INFORCRM-12484 | Update Sales Order and Quote Detail view topics to specify which tabs are ICBOE specific. |
| INFORCRM-12485 | Add a new topic for Sales Order detail view Distributed Taxes tab. |
| INFORCRM-12489 | (ICBOE) The Sales Order Distributed Tax tab should be renamed "Tax". |
| INFORCRM-12499 | (ICBOE) The Sales Order Taxes tab should be read only. |

Web Model Update 03 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-8766 | In the Campaign Targets tab, changes made to the Status are not saved. |
| INFORCRM-9034 | (ICBOE) If a sales order or quote product line is deleted in Infor CRM, the deletion must be included in Process BOD. |
| INFORCRM-9704 | (ICBOE) Finance Limit on Account is not populated for VISUAL. |
| INFORCRM-9783 | Fixed spelling errors in error messages. |
| INFORCRM-10153 | In a German environment with a Firefox browser, cannot type German characters into the User Lookup. |
| INFORCRM-10205 | In the Sales Order Snapshot, decimal values in the Discount Rate or Tax fields are automatically rounded up or down to the nearest integer. |
| INFORCRM-10268 | The sales order and quote line level views need to include the following Discount Charge Item entity properties: Calculation Method Code, Unit Adjustment Amount, Document Unit Adjustment Amount. |
| INFORCRM-10484 | Unable to assign a user or team to a new campaign task. |
| INFORCRM-11056 | In SpeedSearch if the headline link is for Activity, the link is not active. |
| INFORCRM-11128 | After clicking Get Order Total or Refresh Prices in the Sales Order or Quote detail view, transaction amounts should be updated in Sales Order or Quote Snapshot. |
| INFORCRM-11160 | (ICBOE) When an account record is created or edited in Infor CRM and is promoted the Base Finance Limit field is not set to read only even though the record Sync Status="Awaiting Acknowledgment". |
| INFORCRM-11234 | When editing integration resources, such as contact, calendar, or tasks, the dialog box is blank. |
| INFORCRM-11248 | The Sales Order detail view Get Order Total task is not working. |
| INFORCRM-11252 | Numerous filters on the same Entity can exceed browser limitations causing filters to not display for some groups. |
| INFORCRM-11406 | (ICBOE) The Price and Availability service should not generate user errors when the service is disabled. |
| INFORCRM-11802 | The Add Discount Charges dialog box has three new items to be added to the Web Client help. |

Web Model Update 02 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-5975 | When you edit an item in a pick list and then click Save & New, the blank "Add item" dialog box should display. |
| INFORCRM-6130 | If multi currency is enabled, the Sales Order Exchange Rate field does not display the correct rate. |
| INFORCRM-8211 | When Office Integration is not installed and a user tries to fulfill a literature request, the message still says "Saleslogix Desktop Integration". |
| INFORCRM-8693 | Opportunity Products Adjusted Price is calculated incorrectly in the Infor CRM Web Client. |
| INFORCRM-9054 | Add "Configurable" to "Lookup Products" and if a product is not configurable and price and availability is configured for the logical ID, then update the products in the products tab with the item price. |
| INFORCRM-9696 | Price Service OrderLineTotal should refresh after changing the currency code. |
| INFORCRM-9788 | On the Quote detail view Discount Charges tab, the add (+) button should be removed. |
| INFORCRM-9841 | Date/Time fields that are exported to file do not use GMT.UTC date rules. |
| INFORCRM-9918 | When TLS 1.0 is disabled, then programs that utilize the DotNetSDataClient library will receive the error "SalesLogix.SData.Client.Framework.SDataException error: "The underlying connection was closed: An unexpected error occurred on a send." |
| INFORCRM-9958 | Cloned Price Services BOD Mappings have a method of "GET" instead of "POST". |
| INFORCRM-10021 | (ICBOE) On the Quote, Sales Order, or Shipment detail view, switching between the Sold To, Bill To, Ship To, or Products tab causes the "You have unsaved data" message to display even though no changes were made. |
| INFORCRM-10056 | (ICBOE) Clicking Get Order Total for quote or sales order with line items should return an error message if the request is rejected. |
| INFORCRM-10080 | Add the pretty key functionality for Opportunity including new AlternateKeyPrefix and AlternateKeySuffix schema and assignment upon record creation. |
| INFORCRM-10109 | The Sales Order detail view Exchange Rate display value should not be rounded. |
| INFORCRM-10121 | After changing the exchange rate for sales order or quotes, the products (line items) should be recalculated with the new exchange rate. |
| INFORCRM-10131 | The Return detail view Ship To tab should include a contact lookup. |
| INFORCRM-10177 | (ICBOE) ERP entities should base values on filter metrics. |
| INFORCRM-10311 | (ICBOE) The Sales Order detail view Bill to tab shows the message "We're sorry, you've encountered an error. If applicable, please try again." |
| INFORCRM-10541 | (ICBOE) Back Office detail view Price Services tab should be able to sort. |
| INFORCRM-10715 | The Sales Order and Quote snapshot totals should include all products when calculating total values. |
| INFORCRM-10755 | The Return Warehouse relationship join should be based upon the SixLocationID. |

Web Model Update 01 for Infor CRM version 8.3 addresses the following issues:



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

| Defect | Description |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-4461 | Users added to a custom Library role may not be able to see additional Library controls in the Web Client. |
| INFORCRM-8765 | Unable to add products to quote or sales order if the selected back office is different from the Account back office. |
| INFORCRM-8823 | The account Timeline displays incorrectly in the Edge browser. |
| INFORCRM-8848 | When adding products to opportunities the line number does not display. |
| INFORCRM-8958 | The Quote status field should not be read-only. |
| INFORCRM-8979 | (ICBOE) On the Bill To detail view, the PaymentTerm and Incoterms picklists storagemode must be CODE. Currently, it is set to Text. |
| INFORCRM-8996 | (ICBOE) Administrators should be able to disable pricing and availability functionality. |
| INFORCRM-9000 | (ICBOE) Selecting an available warehouse and clicking the OK button on the Available Warehouses lookup should refresh the data on the Products tab. |
| INFORCRM-9027 | (ICBOE) The Quote Item and Sales Order Item currency codes are incorrect. |
| INFORCRM-9031 | (ICBOE) The Account Default Warehouse lookup should display descriptions, not ID values. |
| INFORCRM-9034 | (ICBOE) Product Line deleted in Infor CRM does not create a delete request. |
| INFORCRM-9035 | (ICBOE) The Product list for sales orders and quotes should not include canceled products and therefore needs to filter by the ERP status. |
| INFORCRM-9044 | (ICBOE) The Products tab on the Sales Order and Quote detail view should include a Description column. |
| INFORCRM-9047 | (ICBOE) Sales orders with a status of "Invoiced" should be read-only. |
| INFORCRM-9058 | (ICBOE) Implement Price and Availability service. |
| INFORCRM-9080 | (ICBOE) Add Order Date and Net Order Total columns to the Account detail view Sales Order tab. |
| INFORCRM-9088 | (ICBOE) Add debug log messages to all pricing and availability classes and methods and Handling Exception wherever required. |
| INFORCRM-9330 | (ICBOE) Add a Test Link button to the Price Service detail view to test the price and availability end points. |
| INFORCRM-9374 | (ICBOE) On the Shipments, Invoices, and Receivables detail views, the Group List displays the Saleslogix ID instead of External ID. |
| INFORCRM-9421 | (ICBOE) Price Service OrderLineTotal should be updated when Sales Order Items are updated. |
| INFORCRM-9423 | (ICBOE) An incorrect or unresolvable Price and Availability end point URL results in an "Object Reference not set to an object" error message. |
| INFORCRM-9438 | (ICBOE) Updating the quantity in the quote line items does not send a Pricing and Availability request. |
| INFORCRM-9445 | (ICBOE) Deleting a sales order does not behave as expected. |

| Defect | Description |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| INFORCRM-9448 | (ICBOE) When switching between detail view records from the Group List or by using navigation tool bar icons, detail view tool bar icons do not refresh the records have different statuses. |
| INFORCRM-9482 | (ICBOE) When adding existing non-configurable and sellable products to the Quote or Sales Order detail view, the proper price and availability request to the configured ERP returns the error "Operation failed. Message=Value cannot be null. Parameter name: key. HTTP status: Internal Server Error (500)." |
| INFORCRM-9494 | (ICBOE) The Quote Item SlxLocation ID should be updated based on user selection in the Available Warehouses dialog box. |
| INFORCRM-9542 | The record count should be updated in the detail view if a record is deleted. Currently the records count allows users to navigate to the deleted record which causes an error message to display. |
| INFORCRM-9584 | Deleting multiple products from the Products tab on the Sales Order, Opportunity, or Quote detail view does not delete all of the selected products. |
| INFORCRM-9587 | Merging an account does not move associated quotes. |
| INFORCRM-9695 | (ICBOE) When editing a product quantity, on the Sales Order or Quote detail view, the Extended Price and Total columns should update immediately to reflect updated pricing information. |
| INFORCRM-9705 | (ICBOE) In a Visual integration, the Ship To detail view, Sales orders tab, the Total Orders number is correct, but the associated orders are not listed on the tab. |
| INFORCRM-9796 | (ICBOE) The word "UserTriggered" should be two words. |
| INFORCRM-9968 | The next_url query string parameter used as the location for a redirect response is now being transferred between the pages using session state to address a potential security risk. |

File information

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

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

| File Name | File Contents | File Version |
|-----------------------------------------|---------------------------------------------------|--------------|
| Infor_CRM_v830_Web_Model_Update_09.zip | ICRM v8.3.0 VFS Web Model Update 09.zip | |
| ICRM v8.3.0 VFS Web Model Update 09.zip | AccountAccountingEntities.main.quickform.xml | |
| | AccountAccountingEntities.main.quickform.xml.resx | |
| | AccountAccountingEntities.smartpart.xml | |
| | AccountAccountingEntities.smartpart.xml.resx | |
| | AccountContacts.main.quickform.xml | |
| | AccountContacts.main.quickform.xml.*.resx | |
| | AccountContacts.main.quickform.xml.resx | |
| | AccountContracts.main.quickform.xml | |

| File Name | File Contents | File Version |
|-----------|--------------------------------------------------|--------------|
| | AccountContracts.main.quickform.xml.*.resx | |
| | AccountContracts.main.quickform.xml.resx | |
| | AccountDetails.main.quickform.xml | |
| | AccountDetails.main.quickform.xml.*.resx | |
| | AccountDetails.main.quickform.xml.resx | |
| | AccountDistanceSearch.ascx | |
| | AccountDistanceSearch.ascx.cs | |
| | AccountDistanceSearch.ascx.resx | |
| | AccountDistanceSearch.mashup.xml | |
| | AccountDistanceSearch.smartpart.xml | |
| | AccountDistanceSearch.smartpart.xml.resx | |
| | AccountErpDetails.main.quickform.xml | |
| | AccountErpDetails.main.quickform.xml.resx | |
| | AccountExtendedDetails.main.quickform.xml | |
| | AccountExtendedDetails.main.quickform.xml.*.resx | |
| | AccountExtendedDetails.main.quickform.xml.resx | |
| | AccountHierarchy.ascx | |
| | AccountHierarchy.ascx.cs | |
| | AccountHierarchy.ascx.resx | |
| | AccountHierarchy.smartpart.xml | |
| | AccountHierarchy.smartpart.xml.resx | |
| | AccountQuotes.main.quickform.xml | |
| | AccountQuotes.main.quickform.xml.resx | |
| | AccountReturns.main.quickform.xml | |
| | AccountReturns.main.quickform.xml.*.resx | |
| | AccountReturns.main.quickform.xml.resx | |
| | AccountSalesOrders.main.quickform.xml | |
| | AccountSalesOrders.main.quickform.xml.*.resx | |
| | AccountSalesOrders.main.quickform.xml.resx | |
| | AcknowledgeTemplate.main.quickform.xml | |
| | AcknowledgeTemplate.main.quickform.xml.resx | |
| | AcknowledgeTemplate.smartpart.xml | |
| | AcknowledgeTemplate.smartpart.xml.resx | |
| | ActiveIONWorkflows.main.quickform.xml | |
| | ActiveIONWorkflows.main.quickform.xml.resx | |
| | ActiveIONWorkflows.smartpart.xml | |
| | ActiveIONWorkflows.smartpart.xml.resx | |
| | ActivexInfo.aspx.resx | |
| | activity.master | |
| | addCalcField.smartpart.xml | |

| File Name | File Contents | File Version |
|-----------|--------------------------------------------------------|--------------|
| | addCalcField.smartpart.xml.*.resx | |
| | addCalcField.smartpart.xml.resx | |
| | AddEditAddress.ascx.resx | |
| | AddEditAccountAssociation.ascx.resx | |
| | AddEditBackOfficeAcctEntity.main.quickform.xml | |
| | AddEditBackOfficeAcctEntity.main.quickform.xml.resx | |
| | AddEditBODFieldMapping.main.quickform.xml | |
| | AddEditBODFieldMapping.main.quickform.xml.resx | |
| | AddEditBODFieldMapping.smartpart.xml | |
| | AddEditBODFieldMapping.smartpart.xml.resx | |
| | AddEditBOEPAMapping.main.quickform.xml | |
| | AddEditBOEPAMapping.main.quickform.xml.resx | |
| | AddEditBOEPAService.main.quickform.xml | |
| | AddEditBOEPAService.main.quickform.xml.resx | |
| | AddEditConfigGroup.main.quickform.xml | |
| | AddEditConfigGroup.main.quickform.xml.resx | |
| | AddEditContactAssociation.ascx.resx | |
| | AddEditErpBillTo.main.quickform.xml | |
| | AddEditErpBillTo.main.quickform.xml.resx | |
| | AddEditERPShipTo.main.quickform.xml | |
| | AddEditERPShipTo.main.quickform.xml.resx | |
| | AddEditMarketingServicesUser.main.quickform.xml | |
| | AddEditMarketingServicesUser.main.quickform.xml.*.resx | |
| | AddEditMarketingServicesUser.main.quickform.xml.resx | |
| | AddEditPickListItem.ascx | |
| | AddEditPickListItem.ascx.cs | |
| | AddEditPickListItem.ascx.resx | |
| | AddEditReturnShippedProduct.main.quickform.xml | |
| | AddEditReturnShippedProduct.main.quickform.xml.*.resx | |
| | AddEditReturnShippedProduct.main.quickform.xml.resx | |
| | AddEditTask.ascx.cs | |
| | AddPickList.ascx | |
| | AddPickList.ascx.cs | |
| | AddPickList.ascx.resx | |
| | Addresses.main.quickform.xml | |
| | Addresses.main.quickform.xml.resx | |
| | AddressList.ascx.resx | |
| | AddUsers.ascx.cs | |
| | AddUsers.ascx.resx | |
| | admin.master | |
| | appSettings.config | |

| File Name | File Contents | File Version |
|-----------|------------------------------------------------------|--------------|
| | BackOffice.page.xml | |
| | BackOffice.page.xml.resx | |
| | BackOfficeBODMappings.main.quickform.xml | |
| | BackOfficeBODMappings.main.quickform.xml.resx | |
| | BackOfficeBOEPAService.main.quickform.xml | |
| | BackOfficeBOEPAService.main.quickform.xml.resx | |
| | BackOfficeCustomBOEPAService.main.quickform.xml | |
| | BackOfficeCustomBOEPAService.main.quickform.xml.resx | |
| | BackOfficeCustomBOEPAService.smartpart.xml | |
| | BackOfficeCustomBOEPAService.smartpart.xml.resx | |
| | BackOfficeCustomMappings.main.quickform.xml | |
| | BackOfficeCustomMappings.main.quickform.xml.resx | |
| | BackOfficeCustomMappings.smartpart.xml | |
| | BackOfficeCustomMappings.smartpart.xml.resx | |
| | BackOfficeDetails.main.quickform.xml | |
| | BackOfficeDetails.main.quickform.xml.resx | |
| | base.master | |
| | base.master.resx | |
| | BODFieldMapping.page.xml | |
| | BODFieldMapping.page.xml.resx | |
| | BODMappingDetails.main.quickform.xml | |
| | BODMappingDetails.main.quickform.xml.resx | |
| | BODMappingFieldMappings.main.quickform.xml | |
| | BODMappingFieldMappings.main.quickform.xml.resx | |
| | BOEPAMapping.page.xml | |
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| | mnuNew.menu.xml | |
| | mnuNew.menu.xml.*.resx | |
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| | mnuSchedule.menu.xml | |
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| | mnuSchedule.menu.xml.resx | |
| | mnuTools.menu.xml | |
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| | mnuTools.menu.xml.resx | |
| | MobilePortalTemplate.portaltemplate.xml.resx | |
| | MoveContact.ascx | |
| | MoveContact.ascx.cs | |
| | MoveContact.ascx.resx | |
| | navAdministration.navgroup.xml | |
| | navAdministration.navgroup.xml.*.resx | |
| | navAdministration.navgroup.xml.resx | |
| | navEntitiesCustomSetting.navitem.xml | |
| | navEntitiesCustomSetting.navitem.xml.resx | |
| | navIntegration.navgroup.xml | |
| | navIntegration.navgroup.xml.*.resx | |

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|-----------|----------------------------------------------------------------|--------------|
| | navIntegration.navgroup.xml.resx | |
| | navMarketing.navgroup.xml | |
| | navMarketing.navgroup.xml.*.resx | |
| | navMarketing.navgroup.xml.resx | |
| | navPlaces.navitem.xml | |
| | navPlaces.navitem.xml.resx | |
| | navSales.navgroup.xml | |
| | navSales.navgroup.xml.*.resx | |
| | navSales.navgroup.xml.resx | |
| | navService.navgroup.xml | |
| | navService.navgroup.xml.*.resx | |
| | navService.navgroup.xml.resx | |
| | navSupport.navgroup.xml | |
| | navSupport.navgroup.xml.*.resx | |
| | navSupport.navgroup.xml.resx | |
| | new_Place.menu.xml | |
| | new_Place.menu.xml.resx | |
| | new_ToolsSpacer2.menu.xml | |
| | new_ToolsSpacer2.menu.xml.resx | |
| | OpportunityClosedLost.cmdCancel_OnClick.method.xml | |
| | OpportunityClosedLost.lueCompetitorLoss_OnChange.method.xml | |
| | OpportunityClosedLost.main.quickform.xml | |
| | OpportunityClosedLost.main.quickform.xml.*.resx | |
| | OpportunityClosedLost.main.quickform.xml.resx | |
| | OpportunityClosedWon.cmdCancel_OnClick.method.xml | |
| | OpportunityClosedWon.lueCompetitorReplaced_OnChange.method.xml | |
| | OpportunityClosedWon.main.quickform.xml | |
| | OpportunityClosedWon.main.quickform.xml.*.resx | |
| | OpportunityClosedWon.main.quickform.xml.resx | |
| | OpportunityContacts.main.quickform.xml | |
| | OpportunityContacts.main.quickform.xml.*.resx | |
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| | OpportunityDetails.cmdCopyOpportunity_OnClick.method.xml | |
| | OpportunityDetails.main.quickform.xml | |
| | OpportunityDetails.main.quickform.xml.*.resx | |
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| | OpportunityDetails.OnLoad1.method.xml | |
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| | OpportunityErpDetails.main.quickform.xml.resx | |
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| File Name | File Contents | File Version |
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| | OpportunitySalesProcess.ascx.cs | |
| | OpportunitySalesProcess.ascx.resx | |
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| | OpportunityStatistics.mashup.xml | |
| | OutboundTemplate.main.quickform.xml | |
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| | Place.page.xml | |
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| | PlaceContextMenu.contextmenu.xml | |
| | PlaceContextMenu.contextmenu.xml.resx | |
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| | ProdPackageKitView.UnitOfMeasure.21298081b89f46b19f4abc32412e0831.relationship.xml | |
| | ProductAccountingEntities.main.quickform.xml | |
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| | ProductCPQDetails.main.quickform.xml | |
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| | ProductUOM.main.quickform.xml | |
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| | QFSLXSDataLookup.WebControlScriptRenderingTemplate.vm | |
| | QueryBuilderMain.ascx | |
| | QuickForm2Web.vm | |
| | QuickInsertAccountContact.btnOK_OnClick.method.xml | |
| | QuickInsertAccountContact.main.quickform.xml | |
| | QuickInsertAccountContact.main.quickform.xml.*.resx | |
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| | Quote.QuoteAddress.7810b988ec0e47b3906fd7128d5ce907.relationship.xml | |
| | QuoteAddEditDiscountChargeItem.main.quickform.xml | |
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| | QuoteAddEditDistributedTax.main.quickform.xml | |
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| | QuoteDetails.btnCopy_OnClick.method.xml | |
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| | QuoteSnapshot.ascx.cs | |
| | QuoteSoldTo.main.quickform.xml | |
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| | QuoteTasksTasklet.ascx.cs | |

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| | ReturnDetails.main.quickform.xml | |
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| | ReturnShipToDetail.main.quickform.xml | |
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| | ReturnShipToDetail.main.quickform.xml.resx | |
| | RoleDetails.main.quickform.xml | |
| | RoleDetails.main.quickform.xml.*.resx | |
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| | RoleDetails.OnLoadRoleDetails.method.xml | |
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| | RoleTasklet.ascx | |
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| | RoleTasklet.tasklet.xml | |
| | RoleTasklet.tasklet.xml.resx | |
| | RoleUsers.main.quickform.xml | |
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| | Sage.Platform.Scheduling.DelegateSystemJob.job.xml | |
| | Sage.Platform.Scheduling.DelegateUserJob.job.xml | |
| | Sage.SalesLogix.Client.GroupBuilder.Modules.GroupViewerModule.module.xml | |
| | Sage.SnippetLibrary.CSharp.@.0de7b90d-8e9a-4e10-8c00-dc63a41214c4.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.2a58efe6-70aa-48dd-9751-fa42b0f7b9b0.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.2aeba966-e549-4880-8d72-cd34282dea02.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.03ece52b-ed84-472f-acc0-1c9e6f421871.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.5c9de628-c88e-4893-8c52-1a877f68a1e6.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.5f1a7339-5d40-4671-9522-9fe3f4b49035.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.5fc66ecc-305b-4b51-b311-59fa7479c5e0.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.6bae84d4-d7a1-4e90-8709-f38352d24a8a.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.6ca31f10-e98e-4c8c-9b1e-1a9e02633d36.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.6d0c2b05-2371-48a2-a7e6-85499e6b4588.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.7c2f1d21-dd64-490c-8c9f-cd6a297d023f.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.7d5cff5c-0d85-48a2-80ad-8f931bfc9aab.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.9cf68f6b-e657-4280-a31d-609fb82ddd37.codesnippet.cs | |
| | Sage.Snippet.Library.CSharp.@.34fc6dc2-19c4-4016-b79a-c4bf2fe5435c.codesnippet.cs | |

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| | Sage.SnippetLibrary.CSharp.@.50a29bf4-0a49-4cf6-9848-1b93209c6040.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.91d7fa9c-fade-446e-829f-2cfc4b570e1c.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.629d230d-5e07-425f-b494-cf424afbd6fa.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.81526ce1-e9a1-49a6-b66e-eab86a49e14f.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.a208a60c-1b62-4026-9b4e-8cdb57973919.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.b8e3a6ee-fd20-48fa-966d-3d58c4f59478.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.d44aa26d-ea57-49a7-a1c5-fc400d1ab404.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.d91d83f3-efe1-45c0-913c-d94ecbceef36.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.d938e19f-dde6-479b-851e-32a09546fe09.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.db980b6a-4754-4b0f-8a52-7716d51410a4.codesnippet.cs | |
| | Sage.SnippetLibrary.CSharp.@.ea481e10-b8ec-4571-8994-3b1c6e764970.codesnippet.cs | |
| | SalesLogix.resx | |
| | SalesOrder.DiscountChargeItem.cfefb2a763be4b5c9221639464bb0d0f.relationship.xml | |
| | SalesOrder.DiscountChargeItem.f186a7e7179e467c81a0949b9326d0d3.relationship.xml | |
| | SalesOrderBillTo.main.quickform.xml | |
| | SalesOrderBillTo.main.quickform.xml.resx | |
| | SalesOrderDetails.btnCopy_OnClick.method.xml | |
| | SalesOrderDetails.main.quickform.xml | |
| | SalesOrderDetails.main.quickform.xml.*.resx | |
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| | SalesOrderDetails.OnLoad1.method.xml | |
| | SalesOrderDiscountChargeItems.main.quickform.xml | |
| | SalesOrderDiscountChargeItems.main.quickform.xml.resx | |
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| | SalesOrderDiscountChargeItems.smartpart.xml.resx | |
| | SalesOrderDistributedTaxes.main.quickform.xml | |
| | SalesOrderDistributedTaxes.main.quickform.xml.resx | |
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| | SalesOrderDistributedTaxes.smartpart.xml.resx | |
| | SalesOrderErpDetails.main.quickform.xml | |
| | SalesOrderErpDetails.main.quickform.xml.resx | |
| | SalesOrderItem.DiscountChargeItem.732e84f7bbbf4b908e80b5f205ac43cf.relationship.xml | |
| | SalesOrderItem.DiscountChargeItem.dc0adb1b94d1468d87fd8ad985dd7a2b.relationship.xml | |
| | SalesOrderPayFrom.main.quickform.xml | |
| | SalesOrderPayFrom.main.quickform.xml.resx | |
| | SalesOrderProducts.main.quickform.xml | |
| | SalesOrderProducts.main.quickform.xml.*.resx | |
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| | SalesOrderProducts.OnLoadHandler.method.xml | |
| | SalesOrderShipTo.main.quickform.xml | |

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| | SearchAdv.menu.xml | |
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| | SetMingleContext.aspx | |
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| | SIRecommendations.main.quickform.xml | |
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| | SIRecommendations.smartpart.xml | |
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| | SlxClient.cabapp.ptl.xml | |
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| | SLXCustomerPortal.cabapp.ptl.xml.*.resx | |
| | SLXCustomerPortal.cabapp.ptl.xml.resx | |
| | SlxEndPointDetails.btnSave_OnClick.method.xml | |
| | SlxEndPointDetails.main.quickform.xml | |
| | SlxEndPointDetails.main.quickform.xml.*.resx | |
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| | SlxMobile.mobapp.ptl.xml | |
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| | SlxPage.pgtemplate.xml.resx | |
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| | SOAddEditDiscountChargeItem.main.quickform.xml | |
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| | SOAddEditDistributedTax.main.quickform.xml | |
| | SOAddEditDistributedTax.main.quickform.xml.resx | |
| | SOAddEditDistributedTax.smartpart.xml | |
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| | SpeedSearch.ascx.cs | |
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| | SyncResultsHistory.smartpart.xml | |
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| | SyncTemplate.main.quickform.xml | |
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| | TargetResponses.ascx.cs | |
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| | TicketAssets.main.quickform.xml | |
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| | TicketDetails.main.quickform.xml | |
| | TicketDetails.main.quickform.xml.*.resx | |
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| | timeline-bundle.css | |
| | tools_Contour.menu.xml | |
| | tools_Contour.menu.xml.resx | |
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| | tools_Options.menu.xml.*.resx | |
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| | UserDetails.main.quickform.xml | |
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| | UserErpDetails.main.quickform.xml | |
| | UserErpDetails.main.quickform.xml.resx | |
| | UserErpDetails.smartpart.xml | |
| | UserErpDetails.smartpart.xml.resx | |
| | UserProfileOptionsPage.ascx | |
| | UserProfileOptionsPage.ascx.cs | |

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| | UserProfileOptionsPage.ascx.resx | |
| | UserRoles.main.quickform.xml | |
| | UserRoles.main.quickform.xml.*.resx | |
| | UserRoles.main.quickform.xml.resx | |
| | UserServiceAndSupport.main.quickform.xml | |
| | UserServiceAndSupport.main.quickform.xml.*.resx | |
| | UserServiceAndSupport.main.quickform.xml.resx | |
| | UserServiceAndSupport.OnLoad.method.xml | |
| | UserTasklet.tasklet.xml | |
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| | WinAuthLoad.aspx.cs | |

Chapter 2

Applying the Update

2

This Web Model Update affects the following portals:

- Process Host
- SData
- Web Client
- Offline Web Client
- Customer Portal
- SLXJobService



Install the ICRM v8.3.0 VFS Web Model Update 09.zip bundle using the Application Architect, and then build and deploy your Web site(s).

Installing VFS bundles

Install VFS .zip bundles using the Application Architect.



If you are using a local file system, instead of a virtual file system (VFS), you must stop the SLXJobService. You may restart the SLXJobService after building and deploying your web site.

To install the bundles

1. Extract the contents of the **Infor_CRM_v830_Web_Model_Update_09.zip** file to a temporary folder.
2. Ensure the bundle is not blocked.
 - a. Right-click the bundle file and click **Properties**.
 - b. On the **General** tab, if there is an **Unblock** button, click it to unblock the file. The Unblock button only displays if the file is locked.
 - c. Click **Apply**.
 - d. Click **OK**.
3. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
4. Open the **Application Architect**.
5. On the **View** menu, click **Bundle Manager**.
6. Click **Install**.

7. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.3.0 VFS Web Model Update 09.zip**, and then click **Open**.
8. On the **Select Bundle** screen, click **Next**.



- If you have customized your Web Client files, you may receive a message that the bundle contains items that conflict with existing items in this project. See the Application Architect help file topic called 'Merging Changes During Bundle Installation' for instructions before continuing to install the bundle.

9. On the **Select Items** screen, ensure the **Portals** option is selected.
10. Click **Next**, and then click **Finish**.
11. Close Application Architect.
12. Re-open Application Architect.

Merging Configuration files

If you are integrated with Infor Ming.le, you must merge your configuration files with the updated configuration files in this update.

To merge

1. In Application Architect, open the **Virtual File System Explorer**.
2. Expand **Virtual File System Explorer**, expand **Model**, and then expand **Portal**.
3. Merge the SixClient portal web.config files.
 - a. Expand the **SixClient** portal.
 - b. Expand the **Support Files** folder, right-click the **web.config** file, and then click **Open**.
 - c. Open Windows Explorer and browse to the base directory on the Web server, for example, C:\inetpub\wwwroot\, and then double-click the **SixClient** folder.
 - d. Open the **web.config** file.
 - e. Use a comparison tool to merge the contents of both files into the Virtual File System (VFS) version of the web.config file.
 - f. Save your changes.
4. Repeat step 3 for the SixClient **appSettings.config** file.
5. Merge the SData portal web.config files.
 - a. Browse to the **SData** portal.
This is the SData portal you configured when implementing Infor Ming.le.
 - b. Expand the **Support Files** folder, right-click the **web.config** file, and then click **Open**.
 - c. Open Windows Explorer and browse to the base directory on the Web server, for example, C:\inetpub\wwwroot\, and then double-click the **SData** folder.
 - d. Open the **web.config** file.
 - e. Use a comparison tool to merge the contents of both files into the Virtual File System (VFS) version of the web.config file.
 - f. Save your changes.
6. Repeat step 5 for the SData **appSettings.config** file.



When building and deploying, you may see the error "Exception was thrown when getting deployment items: Key already exists." You can safely ignore this error.

Building and deploying the Web changes

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

To build and deploy

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



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

8. Repeat steps 1-6 for each of the affected portals.



If you stopped the SLXJobService prior to applying the VFS bundle, restart the SLXJobService.

Configuring Contour

Before you can use Contour you must enable and configure the Contour integration.



You do not have to reconfigure Contour if you already configured it during a previous update.

To implement Contour, you must:

- Obtain the API for your map provider, either Google Maps or Bing Maps
- Enable the Contour integration
- Configure your map provider API
- Grant permissions or roles to users



For complete steps, see "Configuring Contour Integration" in the Infor CRM Web Client online help.

Infor CRM Back Office Extension (ICBOE) installations

If your installation includes Infor CRM Back Office Extension, you must upgrade the BOD Pack for your ERP system to version 8.3.0.08. For more information, and to download the BOD Packs, see KB 1932176, available from Infor Xtreme www.inforxtreme.com.

Infor CRM ION Workflow

If your installation includes Infor CRM ION Workflow, you must upload additional files to ION Desk and Infor Ming.le. For more information, and to download the files, see KB 1918950, available from Infor Xtreme www.inforxtreme.com.

Configuring Price and Availability

If your Infor CRM installation includes the Back Office Extension feature, the following steps are required to configure Price and Availability.



You do not have to reconfigure Price and Availability if you already configured it during a previous update.

Modifying the content of the Location field

Modify the content of the Location field using information provided by the administrator for your supported ERP system.

This is typically the Warehouse ID, Office ID, or Site ID as defined in the ERP system. This field is only used in publishing new transactions.

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration, 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 **Accounting Entities** tab, click **Edit**.
7. In the **Location** box, type the **Location** information provided by your ERP system administrator.

Adding the End Point URL for the Back Office Price Services

For the Back Office Price services to communicate correctly with the ERP, you must add the unique End Point URL for each Back Office Price service supported by your ERP. Contact your ERP Administrator for these Back Office URL.



Some back offices also require a user name and password. Your ERP Administrator can also provide this information.

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration, 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, select 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.

Update the ION Connection Point and Document Flows

ProcessQuote and ProcessSalesOrders must be added to the ION Connection Point and Document flow to the host ERP system to receive this information from Infor CRM.

For instructions on updating ION Connection points and Document flows, see the Infor CRM BOE Customization Guide.pdf. This document is available in your Infor CRM v8.3 installation media, or from Infor Xtreme at www.inforxtreme.com.

Confirm necessary BOD Mapping Outbound triggers are enabled

These triggers must be enabled on any entity that is bi-directional, for Infor CRM to publish BODs to your host ERP system. The default setting on entities that are not bidirectional is off.

See the Systems Integration Guide for your ERP for a full list of required triggers

To modify

1. Sign in to Infor CRM as Administrator.
2. In the Navigation Bar, expand **Administration, 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:
 - a. Outbound on Create
Enables creating new records in CRM and promoting them to the host system.
 - b. Outbound on Update
Enables modifying promoted records and publishing changes to the host system.
 - c. 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 System of Record



You do not have to re-enable System of Record if you already enabled it during a previous update.

Infor CRM Web Model Update 02 for v8.3 added the ability to enable Infor CRM as the System of Record. If your installation includes an integration with a supported ERP system and you want to enable Infor CRM as the System of Record, you must enable the feature. System of Record is disabled by default.



These instructions assume that Infor CRM Back Office Extension is already configured in your environment. This includes configuration with Infor ION and a supported ERP system.

To enable

1. Sign into the **Infor CRM Web Client** as the **Administrator**.
2. On the **Integrations** List view, click **Back Office Extension**, and click the **Options** tab.
3. 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.

Enabling Permissions for Promote

When Infor CRM is enabled as system of record, users with appropriate permissions will have the ability to promote selected record types to the ERP system. These permissions are controlled by assigning the appropriate Secured Action to a role, and assigning that role to users. The Promote feature will not be available to users who have not been assigned permissions.

To assign Promote permissions

1. Sign into the **Infor CRM Web Client** as the **Administrative user**.
2. In the **Navigation** bar, expand **ADMINISTRATION**, expand **Roles**, and select the role assigned to users who are to be given permissions to Promote.
You may choose to create a new role or assign these permissions to an existing role, such as the Standard Use role.
3. Click the **Actions** tab.
4. Click the Add (plus) button.
5. In the **Lookup**, locate **Entities/Promote**.
6. Double-click and then click **Close**.