

New features

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

Application	Feature
9.2	
General enhancements	
	Connection Manager
	For Microsoft SQL only The SQL Native Client has been replaced with the Microsoft OLE DB Driver for SQL Server. You will need to update your connection information in the Connection Manager. See See "(Microsoft SQL Only) Updating Database Connection in Connection Manager" on page 12 for steps.
	Reporting
	Crystal Reports has been updated to version 13.0.33.4485.
	Conversion Utility
	All events are now written to the log file, including the start and end times of each action.
Windows Client	
	Sales Orders
	When a sales order is closed, the Closed field is set to True and the Closed Date field is populated with the date.
	Tickets
	When a ticket is closed, the Closed field is set to True.
Infor CRM SLX Mail Merge add-in for Microsoft Word	
	Time Zone field formatting.
	You can now type a new Family value and that template family will be visible if a template of that family is shared with another user. Also if the Family picklist is edited in the Web Client, the new Family will be available in the Word add-in.
	A new programmable item.
	When inserting a table in a mail merge template, all available table styles are listed in the document, not just a predefined subset, including custom table styles defined in the document.
	There is a new "Repeat header at the top of each page" option for tables.
	The Mail Merge Field Manager dialog box is wider and the field panel can be re-sized and remembers the slider position.
	Requested By is now available for Quotes.

Web Client	
	General
	The column splitter to re-size columns is now easier to select.
	Customer Journey
New forms*	Customer journeys are a series of stages and steps to guide a user and record, for example an opportunity or contact, through a particular process. The Customer Journey tab on the Contact, Account, Opportunity, and Lead detail views allows users to select and start a customer journey and track progress by performing and completing steps

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	and stages. On the Dashboard, the Customer Journey Opportunity Kanban widget is used to view a list of the opportunities in each stage of a selected customer journey as well as roll-up totals of the sales potential, actual sales amount and weighted potential of the opportunities in each stage.
	SpeedSearch enhancements
Updated form*	■ The SpeedSearch text box in the menu bar and SpeedSearch view: ■ Includes a drop-down list to select the types of records to search against. ■ Most frequently used items appear at the top of the list ■ Supports type-ahead search against the selected record types ■ Supports in-context search. If you are on a list or detail view that can be searched against, that record type is automatically selected for you. ■ The SpeedSearch view user interface has been updated ■ Search options have been simplified ■ Search results are displays by record type in grids that can be sorted and columns can be added, removed, or resized. ■ Matches column lists the number of matches for each record. When hovered over, you can view a preview of the matching text.

Web Client Administrator	
	Customer Journeys
New form*	Ability to create and manage customer journeys and customer journey stags and steps.
	Job Server improvements
	▪ 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*	▪ 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.
	CRM Workflow
	Ability to manually start a workflow using the SData API ▪ Method: QueueWorkflow ▪ ResourceKind - ionWorkflowDefinitions ▪ Parameters - currentEntityType (string), entityId (string) ▪ Result: IONWorkflowId (string)

Application	Feature
	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.
	Manage Licenses
New form*	Ability to add or remove licenses from the Web Office Profile, Licenses tab.
Updated form*	
	Activity Realignment
Updated form*	Ability to reassign activities with Common Tasks option in the Activities List view. Note: This is only available to the administrator.
	Secured Actions
	Administration/CustomerJourney/Add - grants permission to add a customer journey. It is part of the Administrator role.
	Administration/CustomerJourney/Delete - grants permission to delete a customer journey. It is part of the Administrator role.
	Administration/CustomerJourney/Edit - grants permission to edit a customer journey. It is part of the Administrator role.
	Administration/CustomerJourney/View - grants permission to view a customer journey. It is part of the Administrator role.
	Administration/CustomerJourneyInstance/Delete - grants permission to delete a customer journey instance. It is part of the Administrator role.
	Administration/License/Add – grants permission to add an Infor CRM license – Not part of any role.
	Administration/License/Delete – grants permission to delete an Infor CRM license. Not part of any role.
	Entities/User/LoggedInUsers – grants permission to view the currently logged in users.

Back Office	
	Price Service Support for Unpromoted Accounts
Updated form*	Ability to specify pricing for opportunities, quotes, and sales orders of unpromoted accounts. There is a new Default Customer ID field on the Add/Edit Back Office Accounting Entity dialog box to specify the ERP-based customer number for integrated pricing of opportunities, quotes, and sales orders of unpromoted accounts.
	Enhanced Bod processor logic
	Enhanced BOD processor logic limits the BOD content allotted to each worker job thread based on the active BOD payload sizes.

Application	Feature
Customer Portal	
	Password Security
	- Customer Portal passwords are now stored using a one-way hashing function, meaning they cannot be decrypted. - The conversion utility will convert existing passwords. - 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.