



Applying Web Core Update 01 for Version 8.4

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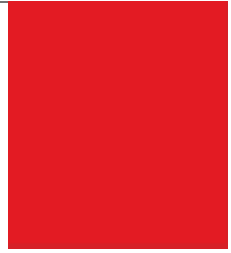
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Introduction



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 Core Update 01 for Infor CRM version 8.4.

Prerequisites

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

- Infor CRM version 8.4
- 8.4 SNC Update 01

If you intend to install only the Core update, your environment must be configured to use the Virtual File System (VFS). If your environment is configured using the Local File System (LFS), you must also apply 8.4 Web Model Update 01, including the steps for updating and merging the tenant.config file. For more information see the Applying Web Model Update 01 for Version 8.4 document.



Do not install Web Core Update 01 for Infor CRM 8.4 on any other Infor CRM version.

Contacting Infor

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

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

This chapter lists all of the changes to Infor CRM since version 8.4.

Breaking Changes

This update contains changes to the Sage.Platform.dll which may cause customizations to not function properly.

The following methods were removed:

- public static IDbConnection CreateConnection(DbProviderFactory factory, string connectionString)
- public static IDbCommand CreateCommand(DbProviderFactory factory, IDbConnection connection)
- public static IDbCommand CreateCommand(DbProviderFactory factory, string commandText)
- public static IDbCommand CreateCommand(DbProviderFactory factory, string commandText, IDbConnection connection)

To modify customization methods

Any customizations that use these functions must be modified. Use the table below to replace the removed methods.

Removed Method	Replace with
IDbConnection CreateConnection(DbProviderFactory factory, string connectionString)	IDbConnection connection = factory.CreateConnection(); connection.ConnectionString = connectionString;
IDbCommand CreateCommand(DbProviderFactory factory, IDbConnection connection)	IDbCommand cmd = factory.CreateCommand(); cmd.Connection = connection;
IDbCommand CreateCommand(DbProviderFactory factory, string commandText)	IDbCommand cmd = factory.CreateCommand(); cmd.CommandText = commandText;
IDbCommand CreateCommand(DbProviderFactory factory, string commandText, IDbConnection connection)	IDbCommand cmd = factory.CreateCommand(); cmd.CommandText = commandText; cmd.Connection = connection;



If you apply this update without modifying your customizations your customizations may no longer function.

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
8.4.0.01						
Web Client	New Help About box: <ul style="list-style-type: none"> In 8.4 and earlier, the Help>About displayed a page in the Web Client online Help that showed the version number. Now that help is hosted separately from the product, the product requires a Help>About box to ensure the accurate version number is available. 	x	x	x		
	New Office Profiles Privacy tab allows Administrators to share anonymous usage data with Infor. Selecting this check box is optional. Data gathered will help Infor improve the product.	x	x	x		
	Performance improvement: <ul style="list-style-type: none"> Inserting and updating GroupStatistics now uses the NHibernate IStatelessSession. 	x	x			
	Contour <ul style="list-style-type: none"> Updated Google API key About tab provides information about the Contour feature. 	x	x	x		
	The Do not solicit field on the Contact Detail view is now selected by default. When creating a new contact, the default setting for the "Do Not Solicit" check box is now selected. This change was made to provide a process to support compliance with GDPR. This only applies to new contact records. Settings for the "Do not solicit" check box for contact records for customers in the system prior to upgrading to Infor CRM v8.4.0.1 are not impacted.	x	x			
	For Back Office implementations:					

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<p>Promotion Failure Notifications</p> <ul style="list-style-type: none"> ■ When Infor CRM is integrated with a supported ERP system, if an update made by Infor CRM is rejected by the ERP, the user is now notified that the update has failed. <ul style="list-style-type: none"> ■ A Ming.le task can be generated to the user who last worked on the record. ■ An email can be sent and the task escalated if it is not assigned or completed. ■ Auto cancellation of outstanding task is possible if an attempt is made to sync data. ■ These actions do not impact the record itself. 	x	x	x		
	<p>Two Way Quotes and Sales Orders</p> <ul style="list-style-type: none"> ■ When Infor CRM is integrated with a supported ERP system, Infor CRM Web Client users who are creating a Sales Order will see the Order location defined using the term that matches the location used by the ERP: Warehouse, Site, or Office. Product selections will be based on ERP: Warehouse, Site, Office, or Logical ID. ■ In an integrated environment, the Products now includes a location lookup and filtered product lookups. 	x	x	x	x	

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	<p>ION Workflow Enhancements</p> <ul style="list-style-type: none"> ■ The following features have been added to support creating new ION Workflows: <ul style="list-style-type: none"> ■ Users with appropriate permissions can create new workflows by copying and editing existing workflows. ■ New workflows created by copying are automatically given a unique workflow name. ■ New workflows are set to inactive and the auto trigger is set to false by default. 	x	x	x		
Application Architect		No new features				
Windows Client		No new features				



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 Core Update 01 for Infor CRM version 8.4 addresses the following issues:



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

Defect	Description
INFORCRM-5030	When saving long URLs as Attachments, an SDATA error occurs.
INFORCRM-5200	On the Dashboard, the Administrator should be able to delete a dashboard shared by a user.
INFORCRM-5578	On the Campaign detail view, changing the Lead Source should prompt for unsaved data.
INFORCRM-5582	In a localized environment, on the Security Manager Profiles tab the Description is untranslated.
INFORCRM-6921	Custom Standard ID fields should not allow the Can BulkUpdate option to be selected.
INFORCRM-7143	On the Campaign detail view Targets tab, selecting or clearing the Initial check boxes, and then navigating to the next or previous campaign should prompt for unsaved data.
INFORCRM-7255	In an environment with UK regional settings, the date format is incorrectly converted to US date format in Query Builder.
INFORCRM-7505	in Application Architect, changing the layout of a group with two filters with same field name, such as Account.SubType and Contact.SubType, causes the values of one filter to be populated with the values of the other filter.
INFORCRM-7515	Adding an Account Manager's name to a mail merge template causes the error "OnRequestFormat (fmtUser)"
INFORCRM-7791	Unable to attach a file with a "+" in the file name.
INFORCRM-7817	Viewing the Print View version of a smart part when a secured-action-restricted button is included in the main form causes the error "Error CS0103: The name [Controllid] does not exist in the current context."
INFORCRM-8370	Under some circumstances the updated data prompt does not appear when there are unsaved changes.
INFORCRM-8757	Opening a group and pressing the Delete key hides the group.
INFORCRM-8921	The SOURCEDATE is shown in UTC/GMT instead of local time.
INFORCRM-8923	When scheduling an activity from a Sales process the start date is yesterday's date, not current date.
INFORCRM-10856	Expired passwords cannot be changed on the User detail view.
INFORCRM-11996	In an Internet Explorer environment, on a custom text field the word wrap does not function properly.
INFORCRM-12298	Grids based on HQL mashups with a formula in the select statement do not display data.
INFORCRM-12966	The Application Architect Quickform Details view does not save changes to the Owner Type Properties.
INFORCRM-13185	The SalesLogix Job Service frequently has an error in the EventViewer.
INFORCRM-13232	Bundled entities do not carry over Properties changes.
INFORCRM-13265	After adding several combo boxes to a Quick form and building and deploying, when a user logs in, only the first combo box has the correct column span.

Defect	Description
INFORCRM-13335	In an Internet Explorer browser, scrollbars on dashboard widgets drag entire widget container upon click release.
INFORCRM-13383	After promoting a group to the dashboard, hovering over the widget displays the move pointer icon.
INFORCRM-13951	On the Users List view, the Lookup button does not work.
INFORCRM-14140	Saving a newly created Contact/Account causes the error message "When saving a contact, an Account entity was expected but was not found." to display.
INFORCRM-14160	The Submit to Speedsearch default option is ignored when set to True.
INFORCRM-14187	When using the Internet Explorer browser, if a user clicks the Account detail view Web URL WWW icon the browser window that opens cannot be maximized.
INFORCRM-14747	Intermittent skipping of records when navigating between Account Detail pages.
INFORCRM-15587	Clicking View Group on the Welcome page My Notes' pane displays an error.
INFORCRM-15835	Computers with touch screen displays are unable to see the complete Customer Portal client.
INFORCRM-15881	In a localized environment, the Job Manager Run/Schedule Job dialog box contains untranslated strings.
INFORCRM-16137	Request to fetch hidden filTer does not encode the key value.
INFORCRM-16236	In the Group Manager, Groups tab the Modify Date and Shared Date in the lower details pane is different than the values in the list for a selected record.
INFORCRM-16305	In an environment with Deutsch (Schweiz) [de-ch regional settings, on the Account detail view, Literature Requests tab, the Request Date should be in the dd.MM.yyyy format.
INFORCRM-16310	In a Thai environment, dates and times must be consistent for both Gregorian and Buddhist calendars.
INFORCRM-16341	In a Thai environment, when adding a user, the page title is truncated.
INFORCRM-16622	The default values for the Activity Regarding and Category are ignored.
INFORCRM-16644	After adding a Timed activity to a ticket, the value is not added in the Total Hours in the Contract Tickets Total Hours column. The Total Labor shows an aggregate of parts and labor costs, but it should only show labor numbers
INFORCRM-16715	Filters on All Open tab for Activities do not return records as expected.
INFORCRM-16852	The Opportunity Statistics report always shows currency values in USD.
INFORCRM-16871	In Application Architect, adding a column in the Addresses Form displays the error "An item with the same key has already been added.
INFORCRM-16894	Incomplete or No Cache-control and Pragma HTTP Header Set
INFORCRM-17029	On the Quote Detail view, clicking Generate Proposal, the wrong error message displays.
INFORCRM-17069	A string User lookup in a tabbed workspace does not refresh on next record.
INFORCRM-17628	The Default address picklist value "Office" is not an actual picklist item.
INFORCRM-17752	Setting a default picklist item does not have any effect.
INFORCRM-17757	On the Dashboard, My Notes widget, the View Link is not linked to a valid page.
INFORCRM-17842	Running Web Reports against ticket or defect ad-hoc groups causes an "Unknown error in response to an HTTP request" error.

Defect	Description
INFORCRM-18138	There is no primary email available when selecting E-mail on Import History.
INFORCRM-18171	In a Chinese environment, the 'unsaved data' message is truncated.
INFORCRM-18443	Unable to manually enter a time when for scheduling reports.
INFORCRM-18502	In an English(UK) environment with US regional settings, manual changes to Date fields are lost upon leaving the field.
INFORCRM-18536	Adding an attachment to a custom entity does not allow other users to view or access the attachment, only the user who added the attachment and the ADMIN can see it in the attachment grid.
INFORCRM-18547	When using Internet Explorer as the browser, on an activity, the Compare button to compare time zones does not work.
INFORCRM-18589	History by Contact report should only show history data if the record has an associated CONTACTID.
INFORCRM-18611	On the Contact and Opportunity detail views check boxes are not aligned correctly.
INFORCRM-18634	Picklist column value formats do not work when picklist data is not in the browser's application local storage when the page loads.
INFORCRM-18749	During a failed logon attempt the username and password are exposed in clear text in the event log.
INFORCRM-18928	When adding a Lookup type filter in the Entity Manager, the filter is created with the "In Dashboard" property selected by default, it should be cleared by default.
INFORCRM-18962	In the Account detail view, an error may occur if the Web URL field is greater than 60 characters.
INFORCRM-18976	After qualifying a lead, the timestamps are wrong for each completed qualification in the Notes/History.
INFORCRM-18988	The word "received" is misspelled in multiple strings.
INFORCRM-19019	When the Meeting Category Codes picklist is modified in Picklist manager to be a required entry, the required flag is ignored.
INFORCRM-19046	UserInfo strings should not be translated.
INFORCRM-19074	When a group is filtered, the record count is incorrect.
INFORCRM-19080	Date based filters with type-ahead display errors because they start processing before the entire date is typed.
INFORCRM-19097	"contact" should be "Contact" in the string "<value>contact {0} in opportunity {1} does not have a defined SalesRole. It is required to synchronize with Marketo</value> "
INFORCRM-19098	The string "<value>Cookie IonApiAuth is Null or Empty.</value>" should be "<value>The IonApiAuth cookie is Null or Empty.</value>"
INFORCRM-19105	When completing an activity from the calendar or activity list view an Event Log error occurs.
INFORCRM-19117	Update the string 'Eq Api' to 'EQ API'.
INFORCRM-19118	The Source Text for the Grid_EmailColumn_Description reference to Phone control should be replaced with "E-Mail".
INFORCRM-19119	'Change Set' should be changed to "changeset".
INFORCRM-19120	Change the string "fully type qualified name" to "fully qualified type name".
INFORCRM-19129	Remove 'at' abbreviations from activity strings.
INFORCRM-19135	In a Russian environment, if a group column Caption is edited to contain Cyrillic characters the characters are corrupted upon saving the group.

Defect	Description
INFORCRM-19140	After editing a record in a detail tab, the tab column headers disappear.
INFORCRM-19142	The help topic for "Adding or Editing a Custom Product" was updated.
INFORCRM-19165	If a validation exception occurs in the business rules, some fields are cleared.
INFORCRM-19185	In a localized environment, the My Pipeline group in Opportunities and the My Pipeline widget on the Welcome page are not formatting dates correctly.
INFORCRM-19189	The Account Owner drop-down should not include Department as an option.
INFORCRM-19213	If a user schedules an activity with a different user as the Leader and then edits the activity an event log error occurs.
INFORCRM-19289	The Ticket Status filter does not show any filter items.
INFORCRM-19290	The Defect Status filter does not show any filter items.
INFORCRM-19322	Exported CSV files are not using commas as the delimiter.
INFORCRM-19324	After editing an ION Workflow condition Attributes and closing the dialog box without first clicking out of the drop-down list, the list continues to display in the left corner of the browser window.
INFORCRM-19325	In a localized environment, the Literature Requests management list view date columns do not use regional formats.
INFORCRM-19337	On the Task Manager, Definitions tab, 'Import task' and Description are in the wrong order.
INFORCRM-19341	In a localized environment, in the Job Manager Definitions tab, when trying to create an ad hoc group an error containing untranslated strings displays.
INFORCRM-19344	In a localized environment, the Check for Duplicates detail view contains untranslated strings.
INFORCRM-19350	In a Chinese environment, in the Literature Requests management list view, the date columns are not formatted correctly.
INFORCRM-19355	When manually cycling the Crystal Reports job, the following message displays "The job service is currently not available."
INFORCRM-19363	In Query Builder when changing the operator on a date field from "equals" to "contains" or "does not Contain" data, the Value field does not clear.
INFORCRM-19370	In the Application Architect Action Item Designer, changes to the height settings are ignored.
INFORCRM-19386	Range filters do not display records with a value that falls between ranges.
INFORCRM-19427	Pre-filters added to custom lookups do not work. All the results for the Lookup are returned and no filtering takes place.
INFORCRM-19438	In Application Architect, the Insert Records action fails if another Insert Action for same table already exists.
INFORCRM-19471	Adding a Remote Office license causes main office and remote office group records to be inaccessible.
INFORCRM-19476	Attempting to save a new account and contact without entering the required information causes the expected validation warnings, but even after adding the required information the record cannot be saved.
INFORCRM-19527	In the Application Architect, when applying a bundle file, types that can be removed should be identified.
INFORCRM-19546	On the User detail view, changes to the Username field do not save, but changes made in the Edit User view save as expected.

Defect	Description
INFORCRM-19547	When an opportunity is associated with a quote and that opportunity is deleted, associating a different opportunity displays the error "No Row with the given identifier exists".
INFORCRM-19567	In a Microsoft Surface Pro 4 environment Customer Portal fails to load.
INFORCRM-19570	Marketo is now supported on Oracle.
INFORCRM-19576	In a group, when Return Distinct Rows is set to True, Group Total Records does not Match Filter Count Total.
INFORCRM-19585	If an Infor CRM account is lower case, and the record is published to Visual, Visual returns the record as upper case which Infor CRM processes as a separate record creating duplicate records.
INFORCRM-19599	In a Windows 7 environment with an Internet Explorer browser, clicking a scroll bar arrow may cause Dashboard widgets to become no longer docked and may cause the Web Client to no longer respond.
INFORCRM-19637	Changing the Account Manager for an account does not update the account manager for any associated contacts.
INFORCRM-19648	(ICBOE) Attempting to accept an AcknowledgeCustomerPartyMaster BOD fails if the ErpExtId is mapped to more than one entity and the wrong entity is selected for processing.
INFORCRM-19677	When attempting to export all account records, a job service error occurs.
INFORCRM-19683	Add validation method for the path when previewing files in SpeedSearch, generating Crystal reports or in the SLX Reporting Assistant parameter editor form.
INFORCRM-19694	When adding a new account; clicking save more than once results in more than one new account record.
INFORCRM-19699	In an Oracle database, any group that contains the ticketassign list condition fails.
INFORCRM-19711	Fix injection vulnerability in Regex expressions with variables.
INFORCRM-19717	An error in code snippet is redirected to the Local Files system instead of the form.
INFORCRM-19720	Fix Injection vulnerability in XPath SelectSingleNode.
INFORCRM-19762	(ICBOE) The BOE DBManager class does not close or dispose of database connections.
INFORCRM-19771	Mail Merge fails with the error "The result for 1 queries was expected, but no data was returned..."
INFORCRM-19775	After disabling the Back Office integration, the "Promote" link should be disabled for users and roles.
INFORCRM-19776	The info message that appears after promoting a user or role should be "The User, "User Name", was successfully submitted for promotion" for user and "The Role, "Role Name", was successfully submitted for promotion" for Role.
INFORCRM-19805	In Application Architect, when installing a bundle, under certain circumstances there are issues with table insertion of records. The issue occurs without error leaving the no evidence that a problem exists.
INFORCRM-19808	Help link on Office Hours tab opens to error.
INFORCRM-19810	Context-sensitive help for Infor CRM v8.4 Web Client is broken.
INFORCRM-19811	Update the context-sensitive help link in the Infor CRM v8.4.0.1 Customer Portal.
INFORCRM-19812	Update the context-sensitive help link in the Infor CRM v8.4.0.1 Web Client.
INFORCRM-19814	(ICBOE) Sales order and quote records are promoted automatically when an associated product is deleted from the record.

Defect	Description
INFORCRM-19816	Updating account addresses and accepting the prompt to update associated contacts fails to update the associated contact addresses..
INFORCRM-19820	The Quote Generate Proposal secured action is misspelled GeneratePropasal.
INFORCRM-19831	Filters can be added to a group even if the associated fields are not present in the layout.
INFORCRM-19912	SQL injection security issue.
INFORCRM-19914	(ICBOE) The BODFieldMapping and BODMapping query results are not cached which may lead to poor performance.
INFORCRM-19930	The Infor CRM Web Client does not set AccountSummary.ParentID field like the Windows Client does.
INFORCRM-19936	Reading the values from Request(QueryString, Requist.params) and sending to clientside via RegisterClientScript call causes an xss security error.
INFORCRM-19952	In the Infor CRM Web Client General Options help topic, step 19 for "Use Active Reporting" should be removed.
INFORCRM-19963	SQL injection security issue.
INFORCRM-20033	Mail Merge must be compatible with the Microsoft Store version of Microsoft Outlook.
INFORCRM-20065	Running any opportunity report with a date range condition causes the error "There was an unknown error in response to an HTTP request.". If you look it up in the job manager, the status is complete, but the phase is "Finalization".
INFORCRM-20067	The contact Suffix field is blank if the Suffix was added when the contact was created.
INFORCRM-20070	In a Russian environment, Cyrillic characters display as symbols.
INFORCRM-20097	When the Display List view check boxes option is selected any groups changed to display in Summary view will not revert to List view.
INFORCRM-20130	The Recently Viewed list does not display recently viewed records until the browser is refreshed.
INFORCRM-20169	Multi-select picklists require two clicks on the ellipses icon to show the available values.
INFORCRM-20190	Running the Open Opportunity by Account report with a date range condition causes the error "There was an unknown error in response to an HTTP request.".
INFORCRM-20197	(ICBOE) An OutOfMemoryException may occur in Saleslogix.Integration.BOE.Jobs.Message.ItemMasterHandler.GetUOMConversionsList ().
INFORCRM-20221	Processing CustomerPartyMaster BODs for accounts fail with a "C_Was_Processed" status of 9 or 999.
INFORCRM-20229	If a contact's work phone number is blank, the Send To Word feature in the Notes/History tab creates the document, but is truncated after Contact Phone.
INFORCRM-20246	To improve performance, use the NHibernate IStatelessSession when inserting/updating GroupStatistics.
INFORCRM-20253	Some of the countries in the Countries view are lowercase and should start with an uppercase letter.
INFORCRM-20298	When adding or editing an opportunity, typing an Estimated Close Date does not save upon leaving the field.
INFORCRM-20299	When a lead is converted to a contact and account, the Import Source is not carried over.

Defect	Description
INFORCRM-20302	If a new multi-regional picklist is added with a Filter value, the Filter value of all other picklists is changed to the new value.
INFORCRM-20308	In localized environment, in Application Architect, Cyrillic characters in an entity's Display Name cause an error.
INFORCRM-20318	(ICBOE) In a Visual integrated environment, when the Inbound CustomerPartyMaster BOD is processed by the ICRM Job Service it is not setting the default value for the Account Type field.
INFORCRM-20336	In an environment with restricted bandwidth, when uploading an attachment file, after the progress bar has reached 100%, an alert titled "undefined" appears and disappears rapidly.
INFORCRM-20339	When a Standard user and the admin use the same browser session, if the admin creates a new team, then the user will see blank fields in any new account created for that team.
INFORCRM-20352	(ICBOE) In an integrated environment, BODs generated from Workflows do not include Unicode data.
INFORCRM-20357	When using the Add Members and Resources lookup for Activity Availability an incorrect number of results is returned.
INFORCRM-20453	(ICBOE) Running the Master Consolidation conversion on a large database may result in a database deadlock.
INFORCRM-20457	When running the CreateUnicodeDB, The ALTER TABLE statement becomes part of the trigger implementation after the conversion. this ALTER TRIGGER statement gets called every time the trigger is executed.
INFORCRM-20459	A database deadlock may occur when the Account.OnBeforeUpdate() business rule method is called. The Account.OnBeforeUpdate() method should not call account.Address.Save() because any change to the Address will cascade when the Account is saved.
INFORCRM-20460	A database deadlock may occur when an Address is added or updated because other Address methods each create their own new ISession and Flush() the changes.
INFORCRM-20465	After rolling over an activity, the start date that displays on the Activities list is two days earlier, but when the activity is opened it is shows the previous day.
INFORCRM-20468	Changing an account owner does not update the SECCODEID on any associated tickets.
INFORCRM-20482	(ICBOE) If a BOD cannot locate the BaseUOMCode for a product the error "System.ArgumentException: An item with the same key has already been added" displays.
INFORCRM-20483	(ICBOE) If a BOD includes multiple product entries with the same Product.ErpUniqueid the error "System.ArgumentNullException: Value cannot be null" displays.
INFORCRM-20484	(ICBOE) The error "System.Collections.Generic.KeyNotFoundException: The given key was not present in the dictionary" occurs in SaveOrUpdateEntity() if Evict() is called for an entity without an id.
INFORCRM-20485	(ICBOE) A database deadlock may occur when deleting SYSBODOutOfOrderRef records using a large IN clause.
INFORCRM-20486	(ICBOE) If the entity associated with a SYSBODOutOfOrderRef record has been deleted from the database A NullReferenceException error will occur.
INFORCRM-20487	(ICBOE) Logged events should record the MessageId (C_ID) when possible.
INFORCRM-20488	(ICBOE) If the XPath is invalid an XPathException error may occur in BodDataArea.SelectSingleNode() .

Defect	Description
INFORCRM-20518	The Saleslogix.Integration.BOE.Jobs.Database.DBManager class does not close or dispose of database connections.
INFORCRM-20522	If a sales process step is completed after 5PM, the Completed Date displays the next day's date.
INFORCRM-20524	Viewing Opportunity Statistics for a group with a filter based on Estimated Close causes an error to display.
INFORCRM-20527	With some regional settings, dates manually typed instead of selected from the calendar are not saved.
INFORCRM-20533	In the Application Architect, using External Assemblies causes errors to occur.
INFORCRM-20535	Custom business rules and event steps may become uneditable.
INFORCRM-20570	Custom business rules may become corrupt and therefore cannot be opened or edited.
INFORCRM-20572	Adding attachments to a custom entity allows only the user who added the attachment and the ADMIN to view the attachment in the Attachments list.
INFORCRM-20574	(ICBOE) A quote proposal created for an account with associated bill to and ship to records does not include the bill to and ship to information.
INFORCRM-20633	If a user does not have permission to view a user, the message should indicate that the user does not have permission to view the user.
INFORCRM-20634	Using the CreateUnicodeDB to convert a database will fail if the database contains any invalid views.
INFORCRM-20660	The error "Sage.SalesLogix.Web.SessionCookieManagerModule - XSRF Attack Detected!" may occur in Event Viewer if a user tries to sign in with the wrong password or when a user opens Infor CRM in multiple browser tabs.
INFORCRM-20707	After adding a custom filter to Opportunities the filter can be applied or cleared as normal, however opening an opportunity from the group that uses the custom filter causes an error.
INFORCRM-20725	If an email address contains a special character, such as an apostrophe or umlaut, when the email address is clicked to open an email message in Gmail or Microsoft Outlook, the email address is truncated after the special character.
INFORCRM-20727	User names with apostrophes should be supported.
INFORCRM-20750	(ICBOE) New users replicated from Ming.le are not created in Infor CRM, because the Sync.SecurityUserMaster BOD is ignored and left in the IOBOX with a status of 0.
INFORCRM-20783	On the Ticket Detail view, after making a change without saving the record, clicking the Ticket Find button to search for tickets does not return any results.
INFORCRM-20794	When opening an activity from a sales process, the title does not include the activity type, only the Regarding value.
INFORCRM-20826	On the Activities list view, selecting multiple activities to Complete and selecting the "Individually" option at the prompt, only one activity is opened to complete. After the first activity is completed the remainder of the selected activities should open one after the other.
INFORCRM-20837	Selecting a filter for a group in a list view, causes incorrect counts to display for other filters.
INFORCRM-20839	Opening, closing, and reopening a lookup causes a vertical scroll bar to appear in the Lookup screen.
INFORCRM-20886	On the Sales Order and Quote detail views, the Bill To and Ship To tabs should display even on non-integrated environments.

Defect	Description
INFORCRM-20888	In a Russian environment, the Add Condition button on a lookup may not be aligned correctly.
INFORCRM-20896	The Sales Order and Quote detail view snapshots do not reflect product totals correctly if they are less than 0.
INFORCRM-20956	Workflows are not triggering because the CRM ProcessWorkflow BOD is not generated.
INFORCRM-20977	In the Architect, adding line breaks to a calculated field prevents all calculated fields displaying in the Web Client
INFORCRM-20983	After enabling X-Content-Type-Options (nosniff) some .png images no longer display.
INFORCRM-21022	Creating a mashup in Application Architect and using a substring in the query causes all column headings to change to Value1, Value2, and so on.
INFORCRM-21024	On the Opportunity detail view Sales Processes tab, clicking an activity link does not open the activity window.
INFORCRM-21037	Viewing the Dashboard, then navigating to a list view, and returning to the Dashboard may cause any funnel widgets to display incorrectly.
INFORCRM-21059	(CPQ only) If CPQ is enabled and the configuration group is defined, all fields in configuration tab are disabled preventing users from making the product configurable.
INFORCRM-21069	Creating an activity for an opportunity and an unrelated account replaces the unrelated account with the account for the selected opportunity when saved.
INFORCRM-21074	There is no email validation on emails, allowing invalid emails to be saved.
INFORCRM-21078	Changing the contact on an activity appears to leave the account as the previous value, but changes the account to the new contact's account upon saving.
INFORCRM-21080	The Account Detail report right hand margin is off the page which causes several fields to be truncated.
INFORCRM-21140	On the Dashboard, the Groups list widget for a quotes groups does not display any records.
INFORCRM-21161	In the Query Builder, on the Conditions tab, selecting Opportunity.Status and using the Browse button to select a value causes an error.
INFORCRM-21173	On the Quotes list view the All Quotes group may load slowly, due to the queries being run in the background.
INFORCRM-21199	When a change is made to an account, if the user tries to navigate to another account using the Group List the Account detail view will not refresh correctly if Cancel is selected on the unsaved data prompt.
INFORCRM-21205	(ICBOE) In a CSI environment, the sales order product unit price is being rounded up when calculating the Extended Price (Base) causing the value to be incorrect.
INFORCRM-21211	(ICBOE) In a CSI environment, the invoice product unit price is being rounded up incorrectly.
INFORCRM-21232	If a user with the Team Owner Profile updates the Account Owner field to be the same Team that they own, an error is thrown.
INFORCRM-21262	The Memcached UDP Amplification Attach needs to be upgraded to a more recent version.
INFORCRM-21263	In a Windows 10 environment with an Internet Explorer 11 browser, in Mail Merge, the call to QueryInterface for IID_IWebBrowser2 may fail.
INFORCRM-21299	The LOGINATTEMPTS does reset to 0 once a user successfully signs on or the Lock timeout limit expires.

Defect	Description
INFORCRM-21338	If the CORS module is configured in the SData portal, the CORS headers are only sent with the preflight OPTIONS request. Since the CORS headers are not present after that, browsers will throw an error that the origin is not allowed.
INFORCRM-21413	When editing an address, updating the country code does not update the country code in the database.
INFORCRM-21462	Update Quartz.NET with fixes associated with blocked jobs.
INFORCRM-21487	In Xbar, on a Contact, selecting the All Open ticket group does not display any tickets for that contact.

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_v840_Web_Core_Update_01.zip	Extra Files folder	
	Infor_CRM_v840_Web_Core_Update_01.exe	
	ICRM v8.4.0 VFS Web Core Update 01.zip	
	ICRM v8.4 Core 01 VFS Actions.zip	
	Updated ICAA files VFS.zip	
Extra Files folder	Sage.Platform.WebPortal.Design.AdminModule.dll	8.4.0.2371
	SlxJobService.exe.config	
	SLXReportingAssistant.exe	8.4.0.2371
Infor_CRM_v840_Web_Core_Update_01.exe	AdminUtil.exe	8.4.0.2367
	AppArchitect.config	
	ConversionUtility_8.4.exe	8.4.0.2367
	CreateUnicodeDB.exe	8.4.0.2367
	GroupTranslator.dll	8.4.0.2368
	Quartz.dll	2.4.1.1
	Sage.Entity.Interfaces.dll	8.4.0.2368
	Sage.Platform.AdminModule.dll	8.4.0.2367
	Sage.Platform.Application.dll	8.4.0.2367
	Sage.Platform.Application.UI.Web.dll	8.4.0.2367
	Sage.Platform.BundleModel.AdminModule.dll	8.4.0.2367
	Sage.Platform.BundleModel.dll	8.4.0.2367
	Sage.Platform.Design.dll	8.4.0.2367
	Sage.Platform.dll	8.4.0.2367
	Sage.Platform.FileSystem.dll	8.4.0.2367
	Sage.Platform.Mashups.dll	8.4.0.2367
	Sage.Platform.Projects.AdminModule.dll	8.4.0.2367
	Sage.Platform.Projects.dll	8.4.0.2367
	Sage.Platform.QuickForms.Designer.dll	8.4.0.2367
	Sage.Platform.QuickForms.dll	8.4.0.2367
	Sage.Platform.QuickForms.WebFormGen.dll	8.4.0.2367
	Sage.Platform.Upgrade.AdminModule.dll	8.4.0.2367
	Sage.Platform.VirtualFileSystem.dll	8.4.0.2367

File Name	File Contents	File Version
	Sage.Platform.WebPortal.Design.AdminModule.dll	8.4.0.2367
	Sage.Platform.WebPortal.Design.dll	8.4.0.2367
	Sage.Platform.WebPortal.dll	8.4.0.2367
	Sage.Platform.Windows.Forms.dll	8.4.0.2367
	Sage.Saleslogix.Activity.dll	8.4.0.2367
	Sage.Saleslogix.Activity.Entities.dll	8.4.0.2368
	Sage.Saleslogix.BundleModel.bundleactions.dll	8.4.0.2367
	Sage.Saleslogix.BusinessRules.dll	8.4.0.2367
	Sage.Saleslogix.Client.Reports.dll	8.4.0.2367
	Sage.Saleslogix.ContractSync.Entities.dll	8.4.0.2368
	Sage.Saleslogix.dll	8.4.0.2367
	Sage.Saleslogix.Entities.dll	8.4.0.2368
	Sage.Saleslogix.HighLevelTypes.dll	8.4.0.2367
	Sage.Saleslogix.PickLists.dll	8.4.0.2367
	Sage.Saleslogix.Plugins.dll	8.4.0.2367
	Sage.Saleslogix.QuickForms.QFControls.Design.dll	8.4.0.2367
	Sage.Saleslogix.QuickForms.QFControls.dll	8.4.0.2367
	Sage.Saleslogix.SchemaSupport.dll	8.4.0.2367
	Sage.Saleslogix.Security.dll	8.4.0.2367
	Sage.Saleslogix.Security.Entities.dll	8.4.0.2368
	Sage.Saleslogix.System.dll	8.4.0.2367
	Sage.Saleslogix.Web.dll	8.4.0.2367
	Sage.Saleslogix.Web.Controls.dll	8.4.0.2367
	Sage.Scheduling.Client.dll	8.4.0.2367
	Sage.Scheduling.dll	8.4.0.2367
	Saleslogix.Integration.BOE.Common.dll	8.4.0.2367
	Saleslogix.Reporting.API.dll	8.4.0.2367
	SLXCacheServer.exe	8.4.0.2367
	SLXCacheServer.exe.config	
	SLXJobServer.exe.config	
	SLXReportingAssistant.exe	8.4.0.2367
	WebProvision.exe	8.4.0.2367
	WebProvisionUI.exe	8.4.0.2367
ICRM v8.4.0 VFS Web Core Update 01.zip	_BaseTaskPaneTasklet.js	
	_DnD-touch-autoscroll.js	
	account_new_16x16.gif	
	Activity.js	

File Name	File Contents	File Version
	Activity_*.js	
	Activity-Combined.js	
	ActivityEditor.html	
	ActivityEditor.js	
	ActivityListPanelConfig.js	
	ActivityNameType.js	
	ActivityService.js	
	ActivityType.js	
	add_products_16x16.png	
	AddEditFiltersDialog.js	
	AddEditPropertiesDialog.js	
	AddressFormatConditionWidget.js	
	Admin.js	
	Admin_*.js	
	Admin-Combined.js	
	Alarm_16x16.gif	
	AllOpenListPanelConfig.js	
	Attachment.js	
	AttachmentList.js	
	Base.js	
	Base_*.js	
	Base-Combined.js	
	BaseGroupContextService.js	
	blue_dot.gif	
	BulkUpdateWidget.js	
	bundleData.xml	
	Calendar_24x24.gif	
	Call_16x16.gif	
	Call_24x24.gif	
	CheckBoxFilter.js	
	ClientBindingManagerService.js	
	columnHider.js	
	ColumnReorder.js	
	ColumnResizer.js	
	CommonTasksTasklet.js	
	Company_24.png	
	CompoundColumns.js	
	ContactDetailSummary.html	

File Name	File Contents	File Version
	Copy_24x24.gif	
	Copy_32x32.gif	
	Currency.js	
	Dashboard.js	
	Dashboard_*.js	
	Dashboard-Combined.js	
	DashboardWidgetCell.js	
	DateTimePicker.js	
	default_favicon.png	
	Delete_16x16.png	
	Delete_16x16-1.png	
	DependControl.js	
	Dialog.js	
	Dialog_*.js	
	Dialog-Combined.js	
	DijitRegistry.js	
	DnD.js	
	DragDropWatcher.js	
	elipses.gif	
	Email.js	
	Filter_16x16.png	
	Folder_add.png	
	Folder_delete.png	
	Folder_edit.png	
	greendot.gif	
	Grid.js	
	GridView.js	
	GroupContextService.js	
	GroupListTasklet.js	
	GroupManager.js	
	GroupManagerActions.js	
	GroupManagerFormatter.js	
	GroupNavigator.js	
	GroupsTitlePaneConfigProvider.js	
	HelpAboutDialog.html	
	HelpAboutDialog.js	
	HelpMenu.js	
	Hide_Details_active_16x16.gif	
	Hide_Details_inactive_16x16.gif	

File Name	File Contents	File Version
	inforSoHoXi.css	
	IONWF CurrentDate Notifcation Job.trigger.xml	
	IonWorkflow.js	
	IONWorkflowHelper.js	
	JobManagerActions.js	
	layout.css	
	Link.js	
	ListPanel.js	
	LookupFilter.js	
	MailMergeService.js	
	MailMergeService_*.js	
	manifest.xml	
	Meeting_16x16.gif	
	MenuBar.js	
	misc.js	
	mouse.js	
	MultiSelectPickList.js	
	Name.js	
	NotesHistoryList.js	
	OfficeIntegrationSetup.exe	8.40.1219.0
	opportunity.gif	
	OpportunityTasksTasklet.js	
	Pagination.js	
	PickList.js	
	plus_16x16.gif	
	plus_16x16.png	
	Print_View_16x16.gif	
	PromoteWidget.js	
	QBAddCondition.ascx	
	QBAddCondition.js	
	Quartz.dll	2.4.1.1
	QueryBuilder.js	
	QueryBuilderMain.ascx	
	QueryBuilderMain.js	
	QuoteTasksTasklet.js	
	recurring.png	
	reddot.gif	
	refresh.png	

File Name	File Contents	File Version
	Report.js	
	Report_*.js	
	Report-Combined.js	
	Reset_16x16.png	
	RoleTasklet.js	
	Sage.js	
	Sage.Platform.Application.dll	8.4.0.2367
	Sage.Platform.Application.UI.Web.dll	8.4.0.2367
	Sage.Platform.Design.dll	8.4.0.2367
	Sage.Platform.dll	8.4.0.2367
	Sage.Platform.FileSystem.dll	8.4.0.2367
	Sage.Platform.Mashups.dll	8.4.0.2367
	Sage.Platform.QuickForms.dll	8.4.0.2367
	Sage.Platform.Scheduling.SData.dll	8.4.0.2367
	Sage.Platform.VirtualFileSystem.dll	8.4.0.2367
	Sage.Platform.WebPortal.Design.dll	8.4.0.2367
	Sage.Platform.WebPortal.dll	8.4.0.2367
	Sage.SalesLogix.Activity.dll	8.4.0.2367
	Sage.SalesLogix.BusinessRules.dll	8.4.0.2367
	Sage.SalesLogix.BusinessRules.Jobs. IONWFCurrentDateNotificationJob.job.xml	
	Sage.SalesLogix.Client.GroupBuilder.dll	8.4.0.2367
	Sage.SalesLogix.Client.IntegrationContract.Modules.dll	8.4.0.2367
	Sage.SalesLogix.Client.MailMerge.dll	8.4.0.2367
	Sage.SalesLogix.Client.Reports.dll	8.4.0.2367
	Sage.SalesLogix.Client.Reports.Helper.dll	8.4.0.2367
	Sage.SalesLogix.dll	8.4.0.2367
	Sage.SalesLogix.HighLevelTypes.dll	8.4.0.2367
	Sage.SalesLogix.IntegrationContract.dll	8.4.0.2367
	Sage.SalesLogix.PickLists.dll	8.4.0.2367
	Sage.SalesLogix.Plugins.dll	8.4.0.2367
	Sage.SalesLogix.Process.Activities.dll	8.4.0.2367
	Sage.SalesLogix.QuickForms.QFControls.dll	8.4.0.2367
	Sage.SalesLogix.SchemaSupport.dll	8.4.0.2367
	Sage.SalesLogix.Security.dll	8.4.0.2367
	Sage.SalesLogix.Services.PotentialMatch.dll	8.4.0.2367
	Sage.SalesLogix.Services.SpeedSearch.dll	8.4.0.2367
	Sage.SalesLogix.System.dll	8.4.0.2367
	Sage.SalesLogix.SystemAdapter.dll	8.4.0.2367

File Name	File Contents	File Version
	Sage.SalesLogix.Web.Controls.dll	8.4.0.2367
	Sage.SalesLogix.Web.dll	8.4.0.2367
	Sage.Scheduling.Client.dll	8.4.0.2367
	Sage.Scheduling.dll	8.4.0.2367
	Sage_*.js	
	Sage-Combined.js	
	sage-platform-integrationcontractservice.js	
	sage-platform-tabworkspace.js	
	sage-styles.css	
	Saleslogix.Geocode.dll	8.4.0.2367
	Saleslogix.Integration.BOE.Common.dll	8.4.0.2367
	Saleslogix.Integration.BOE.Jobs.dll	8.4.0.2367
	Saleslogix.Integration.BOE.PriceAndAvailability.dll	8.4.0.2367
	SalesLogix.Integration.Marketo.API.dll	8.4.0.2367
	SalesLogix.Integration.Marketo.dll	8.4.0.2367
	Saleslogix.Reporting.API.dll	8.4.0.2367
	Saleslogix.Reporting.dll	8.4.0.2367
	Saleslogix.SDataSyncJob.dll	8.4.0.2367
	Schedule_To_Do_16x16.gif	
	SData.js	
	SDataLookup.js	
	SearchConditionWidget.js	
	SecurityManager.js	
	Send_Write_email_16x16.png	
	Service.js	
	ShareGroup.ascx	
	ShareGroup.js	
	Show_Details_active_16x16.gif	
	Show_Details_inactive_16x16.gif	
	SixBase.css	
	SixLink.js	
	SpeedSearch.ascx.cs	
	supportonline_favicon.png	
	sync_all_16x16.png	
	SyncHistoryTasksTasklet.js	
	Task_List_3D_24x24.gif	
	theme.css	
	To_Do_16x16.gif	

File Name	File Contents	File Version
	To_Do_24x24.gif	
	URL.js	
	UserService.js	
	UserTasklet.js	
	Utility.js	
	yellowdot.gif	
ICRM v8.4 Core 01 VFS Actions.zip	<p>Create database object</p> <ul style="list-style-type: none"> ■ ACCOUNT_INTEGRATION_CHANGE (MSSQL) ■ ACTIVITY_INT_INSTEAD_INS(MSSQL) ■ ACTIVITY_INTEGRATION_CHANGE (MSSQL) ■ ACTIVITY_INTEGRATION_INSERT (MSSQL) ■ ACTIVITYATTENDEE_INT_INSTEAD_INS (MSSQL) ■ ACTIVITYATTENDEE_INTEGRATION_CHANGE (MSSQL) ■ ADDRESS_INT_INSTEAD_INS (MSSQL) ■ ADDRESS_INTEGRATION_CHANGE (MSSQL) ■ ADDRESS_INTEGRATION_DELETE (MSSQL) ■ ADDRESS_INTEGRATION_INSERT (MSSQL) ■ ADHOCGROUP_INTEGRATION_INSERT (MSSQL) ■ ADHOCGROUP_INTEGRATION_TOMBSTONE (MSSQL) ■ Alter AccountAccountingEntity (MSSQL) ■ Alter AccountAccountingEntity (Oracle) ■ Alter BackOfficeMapView (MSSQL) ■ Alter BackOfficeMapView (Oracle) ■ BodFieldMapping_Quote_ISACTIVE (All) ■ BRANCHOPTIONS_USECUSTOMERPORTALHELP_USECUSTOMWEBHELP (MSSQL) ■ BRANCHOPTIONS_USECUSTOMERPORTALHELP_USECUSTOMWEBHE(All) 	

File Name	File Contents	File Version
	<ul style="list-style-type: none"> ■ CONTACT_INT_INSTEAD_INS (MSSQL) ■ CONTACT_INTEGRATION_CHANGE (MSSQL) ■ CONTACT_INTEGRATION_INSERT (MSSQL) ■ CONTACT_TOMBSTONE (MSSQL) ■ CreateBoeAckStatusDefinition(Oracle) ■ CreateBackOfficeMappingViews(MSSQL) ■ CreateBackOfficeMappingViews(Oracle) ■ CRMREFIXFRROLES (All) ■ CustomSetting (All) ■ Default Help Url (MSSQL) ■ Default Help Url (Oracle) ■ Drop EXCHANGERATE_PK Index (Oracle) ■ ERPINVOICEVIEW (MSSQL) ■ ERPINVOICEAGINGVIEW (MSSQL) ■ ERPINVOICEVIEW (Oracle) ■ ERPINVOICEAGINGVIEW (Oracle) ■ ERPBILLTOINVOICEAGINGVIEW (MSSQL) ■ ERPBILLTOINVOICEAGINGVIEW (Oracle) ■ ERPSHIPTOINVOICEAGINGVIEW (MSSQL) ■ ERPSHIPTOINVOICEAGINGVIEW (Oracle) ■ ExchangeRate (All) 	
	<ul style="list-style-type: none"> ■ PRODUCTLOCATIONVIEW (MSSQL) ■ PRODUCTLOCATIONVIEW (Oracle) ■ PRODUCTMASTERDATAENABLEDVIEW (Oracle) ■ PRODUCTMASTERDATAENABLEDVIEW (MSSQL) ■ SECTABLEDEFS (All) ■ UPDATE_SYSTEMINFO_COREVERSION ■ UpdateInforSorLocation (All) ■ Update SecuredActionItem (MSSQL) ■ USERACTIVITY_INT_INSTEAD_INS (MSSQL) ■ USERACTIVITY_INTEGRATION_CHANGE (MSSQL) ■ USERACTIVITY_TOMBSTONE (MSSQL) 	

File Name	File Contents	File Version
	Create Table <ul style="list-style-type: none"> ■ PRODUCTLOCATION Create Field <ul style="list-style-type: none"> ■ BRANCHOPTIONS.ANONYMOUSUSAGE ■ IONWORKFLOWDEFINITION.USERNAMEPROPERTY ■ SYSBOEOUTBOUNDTXN.JOBDATA Insert Record(s) <ul style="list-style-type: none"> ■ BACKOFFICE ■ COUNTRYCODEMAPPING ■ CUSTOMSETTINGS ■ EXCHANGERATE ■ INTEGRATION ■ IONWORKFLOWDEFINITION ■ IONWORKFLOWMAPPING ■ LINKEDINCONFIGURATION ■ MARKETOENTITYMAP ■ MARKETOMAPFIELD ■ PERIOD ■ PROVIDER 	
	Insert Picklist <ul style="list-style-type: none"> ■ Address Description (Account) ■ ErpInvoiceStatus ■ Frequencies ■ Marketo Data Type ■ Marketo Field Type ■ Marketo Run Schedule ■ Marketo Sales Insight Tab ■ SyncStatus 	
	Custom Settings <ul style="list-style-type: none"> ■ [ExchangeSync] Notify Members of Completion = True 	

File Name	File Contents	File Version
	Install Plugin <ul style="list-style-type: none"> ■ ACOGroup:OPPORTUNITY:My Pipeline (Infor 8.401) ■ CrystalReport:Account:Account Detail (Infor 8.401) ■ CrystalReport:Defect:Support Defect (INFOR 8.401) ■ CrystalReport:History: History by Contact - Sample (Infor 8.401) ■ CrystalReport:Opportunity: Open Opportunity by Summary (Infor 8.401) ■ CrystalReport:Opportunity: Open Opportunity by Account (Infor 8.401) ■ CrystalReport: Quote: Quote Detail (Infor 8.401) ■ CrystalReport: Quote: Quotation (Infor 8.401) ■ CrystalReport:Ticket:Support Ticket (Infor 8.401) ■ DashboardWidget System:Group List (Infor 8.401) 	
	<ul style="list-style-type: none"> ■ Group:AREACATEGORYISSUE: All (Infor 8.401) ■ Group:DEFECTACTIVITYRATE:AllRates (Infor 8.401) ■ Group:DEDUPRESULT:AllDeDupResults (Infor 8.401) ■ Group: ERPINVOICE:Open (Infor 8.401) ■ Group:ERPINVOICE:PartialPaid (Infor 8.401) ■ Group: ERPPERSON:ActivePersons (Infor 8.401) ■ Group: ERPPERSON:AllPersons (Infor 8.401) ■ Group: ERPPERSON:DeletedPersons (Infor 8.401) ■ Group: ERPPERSON:InactivePersons (Infor 8.401) ■ Group:ERPRECEIVABLE:All Receivables (Infor 8.401) ■ Group: ERPSHIPMENT:MyShipments (Infor 8.401) ■ Group: ERPSHIPMENT:AllShipment (Infor 8.401) ■ Group: EXCHANGERATE:All Exchange Rates (Infor 8.401) ■ Group:INTEGRATION:AllIntegrations (Infor 8.401) ■ Group:LITREQUEST:All Open (Infor 8.401) ■ Group: MARKETOSESSIONLOG:All Session Log Entries (Infor 8.401) ■ Group: MARKETOLEAD: All Marketo Leads (Infor 8.401) ■ Group:PERIOD:All Periods (Infor 8.401) ■ Group:TICKETACTIVITYRATE:AllTicketActivityRates (Infor 8.401) 	

File Name	File Contents	File Version
	<p>Add Secured Action(s)</p> <ul style="list-style-type: none"> ■ Administration/GroupManager/Groups/ToggleUserDefault ■ Entities/Account/PromoteToMarketo ■ Entities/Account/DeleteFromMarketo ■ Entities/ExchangeRate/View ■ Entities/JobManager/ViewAllExecutions ■ Entities/JobManager/ViewAllTriggers ■ Entities/Lead/CancelIONWorkflow ■ Entities/Lead/InitiateWorkflow ■ Entities/MarketoLeads/View ■ Entities/MarketoSessionLog/View ■ Entities/Opportunity/CancelIONWorkflow ■ Entities/Opportunity/ConvertToQuote ■ Entities/Opportunity/DeleteFromMarketo ■ Entities/Opportunity/Import ■ Entities/Opportunity/InitiateWorkflow ■ Entities/Opportunity/Promote ■ Entities/Opportunity/PromoteToMarketo ■ Entities/Opportunity/RePriceOpportunity ■ Entities/Period/DatedExchangeRate/View ■ Entities/Period/ModifyPeriod ■ Entities/Quote/CancelIONWorkflow ■ Entities/Quote/InitiateWorkflow ■ Entities/Quote/GetOrderTotal ■ Entities/Quote/RePriceQuote ■ Entities/Role/Promote ■ Entities/SalesOrder/CancelIONWorkflow ■ Entities/SalesOrder/GetOrderTotal ■ Entities/SalesOrder/InitiateWorkflow ■ Entities/SalesOrder/RePriceOrder ■ Entities/Ticket/Import ■ Entities/User/Promote 	
	<p>Add Role(s)</p> <ul style="list-style-type: none"> ■ Administrator ■ Contour ■ CRM-Marketo User ■ Order and Quote Processor ■ Standard User 	

File Name	File Contents	File Version
Updated ICAA files VFS.zip	AddNewAdHocGroup.method.xml	
	ProcessThis.method.xml	
	Sage.SalesLogix.Analytics.dll	3.0.0.0
	Sage.SalesLogix.Analytics.pdb	
	Sage.SnippetLibrary.CSharp.@.55a856ed-9e39-4678-93aa- ada6b00853cc.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.0ff235ab-34d6-4f82-8eed- b22d30e000ec.codesnippet.cs	

Chapter 2

Applying the Update

2

This Web Core Update affects the following portals:

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

Apply this Update to all computers where the following components have already been installed:

- Administrative Tools and Servers
- Application Architect
- Remote Office
- Offline Web Client
- Web Host


If you intend to install only the Core update, your environment must be configured to use the Virtual File System (VFS). If your environment is configured using the Local File System (LFS), you must also apply 8.4 Web Model Update 01, including the steps for updating and merging the tenant.config file. For more information see the Applying Web Model Update 01 for Version 8.4 document.



Install the VFS bundles using the Application Architect, and then build and deploy your Web site(s).

Installing the update

To begin the install

1. Close all Infor CRM applications on the computer to which you are applying the Update.
2. Stop all Infor CRM services on the computer to which you are applying the Update in the following order:
 - Saleslogix Cache Server
 - Saleslogix DBEventing
 - Saleslogix Job Service
 - Saleslogix Messaging Server
 - Saleslogix SData Synchronization Server
 - Saleslogix SpeedSearch
 - Saleslogix Synchronization Service
 - Saleslogix Server
 - Saleslogix System Service
3. Extract the contents of the **Infor_CRM_v840_Web_Core_Update_01.zip** file to a temporary folder.
4. Navigate to the folder where you extracted the Update files and double-click **Infor_CRM_v840_Web_Core_Update_01.exe**.
5. On the **Infor CRM v8.4.0 Web Core Update 01** screen do the following:
 - a. Select the **Extract and Install the Infor CRM Update** option. The Update files, including the VFS bundle, are extracted to the location you specify. The files are not removed once the installation is complete. Selecting the other option prevents the VFS bundle from being available after the patch is installed, because the files are then deleted.
 - b. Click **Change** to select the location where you want to store the update files.
 -  There is a folder path character limitation that requires the path where you save or copy bundles that are created in the Application Architect to be 57 characters or less (including the drive name).
6. Click **Next**.
7. On the **Welcome** screen, click **Install** to install the patch.
8. If prompted to reboot, click **OK** to allow the reboot.
9. On the **Completed** screen, click **Finished**.



The first time you sign in to Application Architect after applying 8.4.0.01Web Core 01, you will be prompted to upgrade the Virtual File System (VFS). To confirm the upgrade, click Yes.

10. Replace the Sage.Platform.WebPortal.Design.AdminModule.dll.
 - a. Browse to the location where you extracted the update files and open the **Extra Files** folder.
 - b. Copy the **Sage.Platform.WebPortal.Design.AdminModule.dll**.
 - c. Browse to **C:\Program Files (x86)\Saleslogix\Platform** and paste the file.
11. Replace the SLXReportingAssistant.exe.
 - a. Browse to the location where you extracted the update files and open the **Extra Files** folder.
 - b. Copy the **SLXReportingAssistant.exe**.
 - c. Browse to **C:\Program Files (x86)\Saleslogix** and paste the file.

Installing VFS bundles

Install VFS .zip bundles using the Application Architect.

To install the bundle

1. 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**.
2. Ensure you have **Write** permissions to the bundle installation folder. Check permissions on the Security tab on the folder properties.
3. Open the **Application Architect**.
4. On the **View** menu, click **Bundle Manager**.
5. Click **Install**.
6. Select **Filename** and navigate to the folder where you extracted the Update files, click **ICRM v8.4.0 VFS Web Core Update 01.zip**, and then click **Open**.
7. On the **Select Bundle** screen, click **Next**.
8. On the **Select Items** screen, ensure the **Portals** option is selected.
9. Click **Next**, and then click **Finish**.
10. Close Application Architect.
11. Re-open Application Architect.
12. Rebuild the database schema.
 - On the **Tools** menu, click **Rebuild Database Schema**.
13. Repeat steps 3-9 to apply the **ICRM v8.4 Core 01 VFS Actions.zip** bundle.
14. If your installation includes ICAA ,repeat steps 3-9 to apply the **Updated ICAA files VFS.zip** bundle.
15. Close Application Architect.

Modifying the SLXJobServer Configuration file

Infor CRM v8.4.0.01 installs an updated SlxJobServer.exe.config in environments where SlxJobServer.exe.config has not been customized. However, the installation will not overwrite a customized version of SlxJobServer.exe.config.

If you have customized the SlxJobServer.exe.config file, you must complete the following steps.

To update the SlxJobServer.exe.config

1. Navigate to the folder where you extracted the update files, and open the **Extra Files** folder.
2. Open the **SlxJobServer.exe.config** file.
3. Open Windows Explorer and browse to **C:\Program Files (86x)\Saleslogix**.
4. Open the **SlxJobServer.exe.config** file.
5. Use a comparison tool to merge the contents of both files into the local version of the SlxJobServer.exe.config file.
6. Save your changes.

Building and deploying the Web changes

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



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

To build and deploy

1. 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 1-7 for each of the affected portals.
 9. Restart all services that you stopped prior to ["Installing the update" on page 32](#)